

Rockhampton Regional Council

Rockhampton Region Commercial Centres Study

28 August 2021

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Executive Summary

Study Purpose

The purpose of the Rockhampton Regional Commercial Centres study is to prepare a revised centres strategy, taking into consideration:

- Existing and approved centres network in Rockhampton;
- Trends and implications for centres floor space provision;
- Future demand for floor space and appropriate location/s;
- Stakeholder consultation; and
- Challenges and opportunities for Rockhampton centres network.

From this assessment, the study identifies opportunities and challenges for the reuse of existing vacant sites and buildings, outlining the best practice approach to respond to these challenges.

Recommendations and options have been provided relating to:

- Adjustments to the role and function of existing and proposed centres, including regulatory triggers, size and scale and land use mix; and
- Other potential non regulatory policy responses to facilitate commercial growth and redevelopment.

Importance of Planning Scheme to Regulate Centres

Centres' policy is typically the most scrutinised and contested aspect of a planning scheme. It is also the most affected by changing conditions (both economic and demographic) and often substantively influenced by the effect of past development decisions (such as out of centre approvals).

It is critical to get centres policy “right” to support the social and economic sustainability of communities. It can impact the accessibility of employment and services, supports healthy business “ecosystems” and viability as well as underpinning community resilience, local identity and external reputation.

Planning policy is designed to intervene in the market to optimise these outcomes. In particular, it is an important lever for Council to ensure economic health (and vibrancy) of centres by directing development to designated centres and avoiding out of centre development and improve the layout and design of centres to create high quality environments that attract investment.

This requires an understanding of market forces, trends and influences to ensure policy settings are effect in serving the public interest and avoid unintended consequences, especially those that might dampen economic growth. Effective centres policy also requires a careful interplay of economic, land use, transport, built form and urban design dimensions that are coherent and mutually reinforcing.

Centres Overview

Rockhampton Regional Council’s planning scheme outlines the following centres hierarchy:

- **Principal centre:** Rockhampton CBD: The primary business centre for the region with the highest concentration of commercial, retail, entertainment and cultural uses;
- **Major centre:** North Rockhampton (Stockland Rockhampton): Accommodates higher order retail uses (such as discount department stores (e.g. Target, Kmart), supermarkets and specialty retail. Large scale office development is precluded;
- **District centres:** Allenstown, Gracemere and Parkhurst: Intended to service a catchment of 5,000 – 8,000 households to provide a focus for weekly or fortnightly shopping trips and typically accommodate full line supermarkets (Coles / Woolworths);
- **Local centres:** Frenchville, Farm Street, Norman Road, Mount Morgan and a new centre at Parkhurst: Intended to service catchments of 3,000 to 5,000 households, with a focus on convenience needs (i.e. limited line supermarkets such as IGA, as opposed to full line supermarkets);
- **Neighbourhood centres:** Berserker, Kawana, Park Avenue, Wandal and a new centre at Gracemere South: Generally serve a catchment of approximately 1,500 households and provide for day-to-day convenience needs, with small scale shops and personal services;
- **Specialised centres:** Gladstone Road and George Street, Musgrave Street, Yaamba Road: These accommodate showrooms, outdoor sales, food and drink outlets that are highway focused (i.e. typically with drive thru facilities) and small-scale retail.

A review of the network identified that a number of centres have high levels of vacancy, with vacancy rates increasing since the preparation of the previous Commercial Centres study. This trend is of particular concern for the CBD as the region’s economic and community heart. At the other end of the hierarchy, a number of smaller centres have also been impacted by high vacancy rates. Specialised centres are also being affected by changing retail trends more broadly.

Table E-1 Comparative Vacancy Rates (%) – Centres in Rockhampton Regional Council, 2010 and 2021

Centre Name	2010 Vacant sqm	2010 Vacancy Rate	2021 Vacant sqm	2021 Vacancy Rate	Change in Vacancy Rate (%)
Principal Centres					
CBD	21,135	8.8%	43,756	15.6%	6.8%
Major Centres					
Musgrave Street	3,435	3.3%	2,321	2.6%	-0.7%
District Centre					
Gracemere	-	-	594	2.8%	-
Allenstown	312	2.5%	744	4.2%	1.6%
Parkhurst	-	-	1,275	12.8%	-
Local Centre					
Mount Morgan	467	10.0%	3,314	16.0%	6.0%
Norman Gardens	275	4.5%	937	14.4%	9.9%
Frenchville	121	2.8%	939	11.8%	9.0%
Neighbourhood Centre					
Wandal	66	2.6%	559	11.0%	8.4%

Centre Name	2010 Vacant sqm	2010 Vacancy Rate	2021 Vacant sqm	2021 Vacancy Rate	Change in Vacancy Rate (%)
Kawana	434	8.7%	376	7.7%	-1.0%
Berserker	1,609	36.4%	440	4.9%	-31.5%
Park Avenue	327	18.4%	740	12.0%	-6.4%
<i>Specialised Centre</i>					
George Street/Gladstone Road	256	5.0%	4,945	12.6%	7.6%
Musgrave Street	-	-	11,947	15.0%	-
Yaamba Road	-	-	12,023	12.1%	-
Region	28,437	6.4%	84,910	12.2%	5.7%

Note 1: The Gracemere and Parkhurst district centres were yet to be constructed at the time of the 2010 Commercial Centres study.

Note 2: Vacancy rates are based on the outcomes of site inspections at a single point in time and may have since changed.

Source: Urban Economics (2010) and CDM Smith Analysis (2021)

Trends and Implications for Centre Provision

Consideration has been given to a number of current and emerging trends affecting the national and regional economy, including the large-scale shifts to online retail and the consequent impact on retail floor space, new forms of dining, entertainment and lifestyle activities and uncertainty of COVID-19 impacts which have seen the closure of several regional outlets and reduced demand for office space.

Table E-2 summarises the trends and their implications for Rockhampton Regional Council.

Table E-2 Trends and Implications for Centre Provision, Rockhampton Regional Council

Trends	Implications for Rockhampton City
Shift to online retail and the consequent impact on retail floor space provision within regional centres such as Rockhampton	<p>The availability and affordability of technology is expected to continue to positively influence the incidence of online shopping across Australia, particularly in regional areas which may have previously been limited by distribution channels or access to technologies. For regional cities, such as Rockhampton, the growth in online retailing will continue to be a deterrent for large format retailers (bulky goods) considering entering the region as promoting online shopping in these areas brings fewer overheads and a broader market. Large format retail space will, in turn, become increasingly unnecessary.</p> <p>The tenancies which previously had housed large format retailers in Rockhampton City will therefore need to be repurposed. Indoor recreation facilities (such as laser tag, indoor playgrounds and indoor trampoline facilities) are typically situated alongside retail or industrial uses as they require a large floorspace (over 2,000sqm) which is well connected and accessible. Such facilities typically also have a café area inside as a place for parents to wait. Whilst the concept of indoor recreation facilities is relatively new to regional Queensland, South East Queensland (SEQ) has many of these facilities located in or proximate to bulky goods retailers and other retail uses.</p> <p>Indoor recreational uses include laser tag, indoor playgrounds and indoor trampoline facilities. The concept of such facilities is relatively young in regional Queensland. As such, these types of facilities have been located alongside industrial and retail uses.</p> <p>Around Australia there has also been a shift towards online shopping for both fresh food and packaged groceries, which places a question on the necessity of additional physical supermarkets in a given region. However, Rockhampton, and other regional cities across Australia, are unlikely to see a significant shift from physical supermarkets to online channels. This is largely due to three main factors:</p> <ul style="list-style-type: none"> • Patterns of behaviour: oftentimes in regional communities making a trip to the local supermarket can also provide an avenue for socialisation as properties outside of the inner city are isolated; • Perishability and time: the distance between deliveries for supermarket online orders is significantly further than in metropolitan areas. As such the delivery of perishable goods could be compromised; and • Time-frame: the population and distribution of Rockhampton is not such that supermarkets could feasibly offer same day delivery. Therefore, making a trip to the shops is often a more efficient option.
New forms of activity, such as craft breweries, distilleries and artisan producers and shifts towards new forms of centre-based dining, entertainment and lifestyle experience which can often challenge traditional land use definitions and regulatory approaches	<p>The popularity of micro-breweries, distilleries and artisanal production is anticipated to continue, and regional Queensland may provide opportunities for manufacturers to reduce overheads and diversify their consumer market. For Rockhampton City the main considerations when planning for future commercial and retail space is to ensure flexibility in activity definitions in the planning scheme in order to reduce the barriers to entry for new producers and allowing these uses to locate within centres zones where appropriate, particularly within the CBD to achieve the ultimate goal of being a lifestyle and dining precinct.</p> <p>The development of Rookwood Weir is anticipated to improve water security to agricultural producers within the region, allowing for the expansion of agricultural and horticultural production within the region, with outputs potentially sold at markets (either raw production or high value products using horticultural output as an input to production). It is suggested that produce markets are encouraged to be held within the CBD, as opposed to other parts of Rockhampton City, as a means to encourage foot traffic within the CBD.</p>

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Trends	Implications for Rockhampton City
<p>COVID-19 impacts on retail floor space provision (e.g. it is understood that a number of stores have permanently closed due to the impacts of COVID-19 in 2020), and whether these impacts are likely to be short term or sustained in the longer term</p>	<p>The provision of large format retail footprints in centres is likely to only decrease in the future, with a stronger focus on smaller tenancy sizes. It is imperative to ensure that the planning scheme supports flexibility in the adaption of uses within centre zones, as the market transitions away from the provision of large format retail footprints.</p> <p>As previously identified, these tenancies may potentially be repurposed for indoor recreation uses, as evidenced in other centres in capital cities (e.g. the introduction of an indoor skydiving centre in Westfield Chermside in Brisbane City).</p> <p>Alternatively, large format retail footprints may be partitioned where appropriate, to accommodate a mix of smaller scale retail and/or commercial office uses. Stakeholder consultation identified that commercial office tenancies were easier to lease than retail tenancies, indicating that flexibility for tenancies to shift between retail and commercial office uses was imperative.</p>
<p>COVID-19 impacts on commercial office floor space provision (e.g. has working from home reduced the demand for traditional commercial office floor space in the CBD) and whether these impacts are likely to be short term or be sustained in the longer term</p>	<p>The provision of commercial office floor space is anticipated to pivot from permanent offices (e.g. a traditional five year lease) towards commercial buildings which are highly flexible in terms of capacity, lease periods and configurations.</p> <p>Stakeholder consultation identified that COVID-19 represented an opportunity for businesses to re-evaluate their floor space needs, with tenants typically reducing the size of their floor plates.</p> <p>The provision of additional serviced office space by either Council or a private operator was identified as a potential future opportunity.</p>
<p>COVID-19 impacts on perceptions relating to residential built form, particularly within the medium/high density residential segment.</p>	<p>COVID-19 is likely to facilitate a rebalancing of preferences more towards semi-detached and detached dwellings, as opposed to medium to high density dwellings. This suggests that in-centre residential development in the CBD in the short to medium term may ultimately be fewer storeys than originally envisaged (in the form of walk-up product up to three storeys in height), particularly if the site does not offer riverfront views.</p> <p>Residents will increasingly expect private outdoor space, separated office spaces, good acoustic buffering and the ability to separate from other persons residing within their dwelling.</p>

Projected Demand and Key Issues

- There are significant vacancies across retail and office space in the CBD which is unlikely to be filled based on projected demand to 2041. This creates a challenging environment for Rockhampton Regional Council's efforts to revitalise the city centre. However, the CBD Redevelopment Framework has identified a range of significant initiatives particularly within the core precinct.
- There are also significant vacancies in some local and specialised centres. The latter is associated with a reduction in demand for bulky goods space due to a shift towards online retailing and other trends within the sector, particularly in the comparison shopping and bulky goods retail sub-categories.
- Vacancy rates in the centres hierarchy have generally increased since the previous commercial centres study, with our assessment indicating that these vacancies are unlikely to be fully taken up by 2041. While there will be demand for additional supermarkets (refer below), there is limited demand for additional commercial space or other forms of retail space across the whole network (and particularly within those centres where highest vacancies occur).
- Our inventory identified that the proportion of floor space that was described as poor quality was mostly concentrated within local centres and neighbourhood centres, particularly Mount Morgan, Frenchville and Kawana. However, it also occurred within large parts of the CBD. Stakeholder consultation identified that larger vacant tenancies (such as those that occur in the CBD) were typically most difficult to fill. In the commercial office sector, a number of businesses had reduced their required floor plates.
- Landholders in the CBD were not always willing to invest in improved facades or internal fitouts to attract tenants and, anecdotally, lacked financial incentive to do so.
- Within the 2041 horizon, the outlook for additional supermarket floor space is as follows:
 - North Rockhampton: Our analysis suggests demand for an additional full line supermarket within this catchment after 2031 (or before if the proposed Aldi on Yaamba Road does not proceed). The assessment also suggests that demand exists for an additional limited line supermarket over the projection horizon.
 - Gracemere: Our analysis suggests demand for an additional full line supermarket would manifest in the 2031 to 2036 period, with the potential also for an additional limited line supermarket over the projection horizon.
 - Remainder of Rockhampton Regional Council area: Our analysis suggests whilst demand for additional supermarket floor space is anticipated by 2041, the level of demand is not sufficient to support an additional full line supermarket.
- Whilst there are vacant tenancies within the Parkhurst district centre, there is insufficient capacity to accommodate another full line supermarket. Additionally, it would be difficult and unlikely that a further supermarket would be established in the North Rockhampton major centre. This indicates that provision of additional supermarkets within North Rockhampton would need to occur on alternative sites.
- In the southern catchment, there is vacant land within the Gracemere district centre and opportunities within the CBD or within the Gladstone Road specialised centre (on Lot 1 SP161848 – the Fantastic Furniture site adjacent to the existing Aldi) for a possible future supermarket (these are the locations supported by the current planning scheme settings). However, our assessment suggests limited need to allow for a supermarket within the Gladstone Road specialised centre.
- Beyond a need for supermarket floor space, there will be little or no need for additional retail floor space up to and beyond 2041. There may be a modest demand for additional office floor space after 2036, which is likely to be partially met by businesses occupying vacant tenancies within the Rockhampton CBD.

Centres Hierarchy Recommendations

Table E-3 summarises our recommendations for the centres hierarchy in Rockhampton Regional Council.

Other Opportunities to Enhance Centre Performance

Table E-4 outlines other opportunities to enhance centre performance in Rockhampton Regional Council.

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Table E-3 Recommendations for the Centres Hierarchy

Centre	Focus	Changes to current settings and other recommendations
<p>Principal centre Rockhampton Central Business District</p>	<p>This study confirms and supports the current scheme intentions for the CBD. It is to be the primary business centre for the region with the highest concentration of commercial office, lifestyle, entertainment and cultural uses. Important character and heritage values are to be retained.</p> <p>It should accommodate low-medium to high density residential, tourist and short accommodation. Active frontages should be provided, and especially focussed on the core area, together with shaded footpaths, street trees and other pedestrian facilities. It should be well designed, safe and highly accessible and served with all urban infrastructure.</p> <p>It will also form the primary destination and interchange hub for all modes of road and local area public transport.</p> <p>Vacancy rates are to be kept low by retaining current settings which avoid unnecessary expansion of lower order centres and direct larger scale offices (over 500m²) to the CBD core. The provision of a limited line supermarket in the CBD should continue to be supported,</p> <p>Flexibility should be maintained for the expansion of additional food and dining, entertainment and recreational opportunities throughout the CBD, and especially in the Quay Street precinct.</p>	<ul style="list-style-type: none"> • In order to further promote in centre residential opportunities, residential uses could be allowed at ground level (avoiding triggers to higher levels of assessment). The only exception would be in the central “high street” focus area along Denham and East Street (as identified in the CBD Redevelopment Framework. In other locations throughout the CBD, ground level residential uses could be accommodated without substantively threatening activation of casual surveillance outcomes provided they are not excessively wide or orientated away from the street (for example, ensuring balconies overlook the street). • Both short term and long term residential uses could be contemplated in the Denison Street precinct (where they are currently not intended). This may require further detailed review of the current use mix, noting the potential for amenity concerns. However, these issues could be addressed on a site by site basis in order to support a more vibrant transformation of the precinct. • The provision of a limited line supermarket in the CBD is supported. This may require a change to clause (25) in the strategic framework which implies a full line supermarket should locate in the CBD. • Review of car parking rates to ensure reuse and replacement of existing buildings is not penalised where car parking rates may necessitate loss of GFA). This study has not included a car parking or transport strategy, however our high level appraisal is that while car parking rates are not unduly high, there is potential for greater tolerance for lower levels of parking in the CBD, especially in the core precinct. • Include encouragement for craft breweries or distillers and artisan food/craft producers to occur within the CBD and to collocate with food and drink outlets and entertainment facilities. • Align precinct provisions and diagrams with the CBD Redevelopment Framework and streetscape manual. We do not believe this would require substantive changes, although Council could consider: <ul style="list-style-type: none"> - Defining a new smaller core precinct and with the balance as frame. This would primarily relate to street-facing treatment rather than reflect any change in land use mix of built form aspects. It would be the area where Council should continue to require ground level active uses, while more flexibility for ground level residential and commercial can be created for other areas.

Centre	Focus	Changes to current settings and other recommendations
		<ul style="list-style-type: none"> - Some adjustment of elements shown in precinct figures such as active edges, streetscape treatment and function, public realm focus areas, active transport circulation (whether or not precincts are altered). - Making provision for new elements as outlined in the CBD Redevelopment Framework such as the intermodal transport facility and new jetty. • No other changes to existing precinct are required by the framework nor the recommendations from this study. However, future urban design reviews may identify opportunities to refine built form requirements. • Consider the introduction of an infrastructure charges waiver to incentivise in-centre residential development in the Rockhampton CBD. • Do not extend the centre zone designation to include any existing out of zone commercial and retail activity surrounding the CBD to encourage redevelopment for residential purposes to the greatest extent possible (see recommendations for out of centre development below).
<p>Major centre North Rockhampton</p>	<p>This study confirms and supports the current scheme intentions for the Rockhampton’s major centre to accommodate higher order retail and commercial uses (other than large scale offices), with a mix of dining, entertainment and residential opportunities</p> <p>Urban design parameters should continue to focus on providing street oriented buildings, continuous commercial facades, shaded footpaths, street trees and other pedestrian facilities.</p> <p>It should create vibrant focal points for the community and interchange hubs for modes of transport.</p> <p>It should be well designed, safe and highly accessible and served with all urban infrastructure.</p>	<ul style="list-style-type: none"> • Continue to direct large scale retail (such as department and discount department stores) is directed to the major centre as well as to the CBD and discourage large scale offices. No limits on retail or overall floor space are necessary for this centre within the area designated in order to protect the CBD because there is not real prospect of elevating the CBD retail offer to a higher level than North Rockhampton. However, no further outward expansion of the centre is warranted. (Refer to recommendations under specialised centres below regarding the designation of out of centre commercial activities on High Street.) • Continue to allow for a wide range of other activities (including residential) as at present. There is no need to restrict this centre’s ability to add to its lifestyle/experience offer by limiting food and entertainment elements. These are unlikely to undermine the CBD, which will offer a different type of experience and would unnecessarily frustrate other desirable outcomes for this centre. • No change to current strategic framework or zone intentions are required.
<p>District centres Allenstown Gracemere</p>	<p>This study confirms and supports the current scheme intentions for the Rockhampton’s district centres. These are full line supermarket anchored centres, with each supermarket generally serving a</p>	<ul style="list-style-type: none"> • Continue to base these centres around weekly shopping needs, including full line supermarkets and limit the extent of office development. Retain current floor space triggers to impact assessment for retail and offices.

Centre	Focus	Changes to current settings and other recommendations
Parkhurst	<p>catchment of approximately 5,000 to 8,000 households.</p> <p>They provide a focus for weekly or fortnightly shopping trips including full line supermarkets. Flexibility should be provided to accommodate a mix of other uses including residential and food and beverage</p> <p>They should be well designed, safe and highly accessible and served with all urban infrastructure.</p>	<ul style="list-style-type: none"> • Direct a required new full-line supermarket (required over the medium term) serving the southern catchment to Gracemere, rather than allowing expansion of Allenstown (also removing support for a full line supermarket within the Gladstone Road specialised centre, as discussed in specialised centres below). • Some adjustment of current strategic framework and zone intentions will be required to update their intentions. Specifically: <ul style="list-style-type: none"> - Strategic framework outcome (30) and (32) should be revised/combined remove reference to a new supermarket in Parkhurst (Boundary Road) and indicate a second full line supermarket serving the southern catchment should locate in Gracemere district centre rather than Allenstown. - In the zone code, (f) should be revised to say a indicate that in the medium-long term, a second full line supermarket serving the southern catchment should locate in Gracemere district centre rather than Allenstown, although a further, limited line supermarket might be accommodated in Allenstown, with the potential for a limited line supermarket in the CBD should residential densities increase. - In the zone code (g) should be deleted (refer recommendations for Yaamba Road specialised centre below)
Local centres Frenchville Farm Street Norman Road Mount Morgan and New centre at Parkhurst, William Palfrey Road (Lot 5 on SP238731)	<p>This study confirms and supports the current scheme intentions for local centres as generally serving a local catchment of 3,000-5,000 households, providing a focus for convenience needs to serve the local catchment. This may include small convenience-based supermarkets.</p> <p>No additional local centres are required, beyond those that are already zoned or nominated for William Palfrey Road and Norman Road.</p> <p>Existing urban design and built form intentions for these centres are supported.</p>	<ul style="list-style-type: none"> • Continue to base these centres around convenience shopping needs, including small, convenience based supermarkets and limit the extent of office development. Retain current floor space triggers to impact assessment for retail and offices. • No change to current strategic framework or zone intentions are required.
Neighbourhood centres Berserker Kawana Park Avenue Wandal	<p>This study confirms and supports the current scheme intentions for neighbourhood centres, which generally serve a catchment of around 1,500 households.</p> <p>The provide for day to day convenience needs, including small scale shops and personal services.</p>	<ul style="list-style-type: none"> • Continue to base these centres around convenience shopping needs and limit the extent of office development. Retain current floor space triggers to impact assessment for retail and offices. • Current zone intentions should be revised to remove reference to small supermarkets – leaving the test in outcome (a) merely relating to convenience

Centre	Focus	Changes to current settings and other recommendations
and New centre at Gracemere South	<p>No additional local centres are required, beyond those that are already zoned or nominated for Gracemere South.</p> <p>Existing urban design and built form intentions for these centres are supported.</p>	<p>shopping for the immediate catchment. Retain the wording excluding full line supermarkets.</p> <ul style="list-style-type: none"> No change to current strategic framework intentions are required. At the Berserker centre, consider expanding the local centre designation to longstanding commercial and low impact industry uses west of the centre on Elphinstone Street to accommodate changes of commercial activity while still enabling residential redevelopment.
<p>Specialised centres</p> <p>Gladstone Road George Street Musgrave Street Yaamba Road</p>	<p>This study has highlighted changes affecting specialised centres. They may continue to accommodate showrooms, outdoor sales, food and drink outlets that are highway focussed or small-scale and serving visitors and convenience shopping.</p> <p>The specialised centres may also accommodate trade based activities, warehousing and service and low impact industry. Residential redevelopment should be encouraged more extensively across the various precincts, in addition to indoor recreation activities to assist in transitioning vacant land and tenancies.</p>	<ul style="list-style-type: none"> Remove support for a full line supermarket within the Gladstone Road specialised centre (on Lot 1 SP161848 and Lot 1 SP191827), as any further supermarket provision is likely best met in South Rockhampton by Gracemere (This affects zone overall outcomes (4)(b) and (c)). As there is insufficient capacity within the Parkhurst district centre to accommodate another full line supermarket, allow for a full line supermarket on a suitable site within the Yaamba Road specialised centre to meet future needs of the northern catchment. Continue to preclude large-scale offices and retailing (supermarkets, department stores, discount department stores or large-scale shopping centres, apart from the nominated site in the Yaamba Road precinct). Retain existing floor areas triggers for impact assessment. Continue to preclude further expansion of these centres into adjacent residential zones and outside the designated centre areas. However, in the Musgrave Street area, consider including existing commercial uses on the northern side of High Street (east of Ford Street) in the mixed use precinct of the specialised centre zone to allow some opportunities for commercial changes while encouraging residential redevelopment. Review settings for specialised centres to prioritise transition to residential where suitable (and remove requirements for ground level commercial activities) More broadly enable transitioning from bulky goods tenancies to trade based activities, warehousing, service and low impact industries as well as indoor sport and recreation. This may include review of car parking rates, level of assessment triggers and built form requirements.
Out of centre development and other recommendations		<ul style="list-style-type: none"> Apart from suggested rationalisation of some centre zone boundaries mentioned above, continue to articulate strong policies to prevent expansion of existing centres beyond zone land. Retain non-industrial use limitations in industry zones.

Centre	Focus	Changes to current settings and other recommendations
		<ul style="list-style-type: none"> • Retain non-residential use limitations under the low density and high density residential zones (although adjust (h) in the low density zone to remove reference to “full line supermarkets”, saying instead new proposed centres meet the requirements for a neighbourhood centre and do not operate a higher order”. • In the low-medium density residential zone, revise overall outcomes to: <ul style="list-style-type: none"> - Retain allowance for highway oriented uses along Albert Street, although consider limiting this to existing commercial premises (preventing further spread of non residential activities); - Delete outcome (d) and the associated assessment level triggers which suggest offices up to 200m2 are acceptable. Rely instead on the general tests for non residential uses. - In the immediate vicinity of the CBD (the area bounded by George and Albert Streets), allow for reuse of existing non residential buildings, but preclude any further expansion or intensification of these activities. • Review industry threshold tables to avoid capturing craft breweries or other artisanal food/beverage producers as medium or high impact industry.

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Table E-4 Other Recommendations to Enhance Centre Performance in Rockhampton Context

Recommendation
Rockhampton Regional Council to educate external and internal stakeholders on the importance of the centres hierarchy and avoid approval of out of centre development
Implement the strategies identified in the CBD Redevelopment Framework
Rockhampton Regional Council to target landholders with tenancies identified as poor quality, to identify their challenges and barriers to redevelopment / tenancy upgrades
Rockhampton Regional Council to regularly monitor grant funding programs available that encourage activity within the CBD, promote these to the local business community and assist with grant funding applications
Identify opportunities to attract the Rockhampton population into the CBD during non-peak times, with initiatives such as the following to be considered: <ul style="list-style-type: none"> • Outdoor movie events hosted by Council on Friday evening / weekends with a small admission fee to assist in covering costs • Group fitness classes for free / small fee to be run by Council • Produce and/or craft markets on a regular basis along the riverfront • Food trucks on a weekly / fortnightly / monthly basis along the riverfront
Undertake discussions with State Government or engage in a public private partnership to identify and deliver urban renewal opportunities within the Rockhampton CBD to encourage in-centre residential development beyond the waterfront (e.g. Council owned site on William Street)
Investigate placemaking and streetscape improvement opportunities within Rockhampton Regional Council, with a focus on centres that have high vacancy rates
Rockhampton Regional Council to facilitate regular meetings with key stakeholders throughout Rockhampton Regional Council local government area to discuss key opportunities and challenges
Consider strategies to support landowners that have upgraded and cared for their tenancy that is vacant, such as a shopfront activation pilot program, to encourage property owners with vacant premises to provide opportunities for start up businesses in the short term. Incentives could be provided by Council to both the property owner and tenant.
Consideration of amendments to Development Incentives Policy – 1 January 2021 to 31 December 2021 to encourage in-centre residential development in Rockhampton CBD, with a cap on the maximum number of units eligible per development and a fixed cap on the total dollar allocation
Consideration of amendments to Development Incentives Policy – 1 January 2021 to 31 December 2021 to provide additional incentives for selected uses in the CBD, as opposed the Priority Infrastructure Area (PIA) within Rockhampton Regional Council more broadly.
Collate and present key data that encourages and supports business investment, particularly within the Rockhampton CBD, such as data relating to foot traffic, number of workers and in-centre residential population
Proactively identify, evaluate and facilitate redevelopment opportunities for key sites in commercial centres
Review development and rates incentives available to support redevelopment within the CBD
Review car parking and public transport options for commercial centres, including public transport options such as a bus interchange within the CBD

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Section 1 Introduction

1.1 Purpose of Study

CDM Smith (in partnership with Rough Plan) were engaged to prepare a revised commercial centres strategy for Rockhampton Regional Council. The study took into consideration a number of factors, including:

- Existing and approved centres network in Rockhampton;
- Trends and implications for centres floor space provision, including the broader impacts of COVID-19 on Rockhampton;
- Future demand for floor space and appropriate location/s;
- Stakeholder consultation with key representatives, including shopping centre management, real estate agents, industry bodies and key landholders; and
- Challenges and opportunities for Rockhampton centres network.

From this assessment, the study identifies opportunities and challenges for the reuse of existing vacant sites and buildings, outlining the best practice approach to respond to these challenges.

Recommendations and options have been provided relating to:

- Adjustments to the role and function of existing and proposed centres, including regulatory triggers, size and scale and land use mix; and
- Other potential non regulatory policy responses to facilitate commercial growth and redevelopment.

1.2 The Purpose of a Centres Strategy

A commercial centres strategy is an important policy platform for local government in managing growth and development in a way that best serves the community and which supports investment confidence and facilitates successful, prosperous business precincts. It can use both regulatory levers (through the planning scheme) and non-regulatory programs to achieve optimum outcomes for centres.

To be effective, the centres strategy for the Rockhampton region needs to be based on a strong understanding of the demographic profile, market conditions, growth projections, economic trends and Rockhampton Regional Council's broader economic development priorities. These aspects are addressed in the subsequent sections of this report.

The strategy examines and confirms the role and make up of the region's various centres in light of these changing conditions and provides recommendations for the Rockhampton Region Planning Scheme 2015 as well as for other action by Council to support a well-functioning centre hierarchy.

The incorporation of the centres strategy in the planning scheme and the regulation of commercial activity consistent with this strategy is critical to supporting business viability, centre vibrancy and investment confidence. It is also critical to achieving optimum outcomes from public expenditure on infrastructure (especially transport networks) and public realm improvement projects as well as for the efficient provision of government services to the community.

A well planned and well performing centres network:

- Ensures community needs for goods and services are met as conveniently as possible;
- Makes significant employment opportunities accessible;
- Attracts new business and investment;
- Supports efficient use of infrastructure, especially transport networks;

-
- Protects public (and private) investment; and
 - Builds social capital and reinforces sense of identity by providing a focus for community interaction, civic activities, exchange and creativity.

Planning schemes primarily regulate the development of centres in order to ensure economic health of centres by directing development to designated centres and avoiding out of centre development, and to improve the layout and design of centres to create high quality environments.

Once centres policy is established by a local government, it is important for community outcomes and business confidence for it to be adhered. Because of its importance to private investment, it can be one of the most scrutinised and contested aspects of the planning scheme. Fair and consistent decision making by Council is therefore very important. There is room within the decision making framework under the *Planning Act 2016* to apply discretion, especially where needs or economic conditions may change over time. However, this must be done in a way that best serves the community interest, rather than the private interests of applicants or other parties.

Effective centres policy requires a careful interplay of economic, land use, transport, built form and urban design dimensions that are coherent and mutually reinforcing. As identified in the 2010 centres study for Rockhampton region, a well performing centres' hierarchy has the following features:

- A well-defined central business district;
- Centres which caters to a range of retailing and services needs of residents, workers and visitors;
- Public spaces and pedestrian friendly environments – public spaces form an integral part of well performing centres and all centres encourage pedestrian activity and opportunities for community interaction with safe, high quality street-scaping and walkways;
- A focus for higher density dwellings within or at the edge of centres;
- Centres are well serviced and linked by public transport options, minimising the number of private vehicle trips; and
- Centres offer more than retailing – providing lifestyle choices and experiences along with a greater range of facilities and activities.

To achieve these outcomes, there is a strong need for coordination, partnerships and management shared between the public and private sector.

In the absence of effective centres policy, centres floor space provision can end up fragmented, with developers opting to select sites outside of appropriately zoned areas, typically due to lower acquisition costs. The consequence of approving out of centre sites in the absence of demand can lead to a lack of confidence amongst landlords within appropriately zoned areas. This can then lead to increased vacancy rates, reduced investment in the maintenance of tenancies and hence a deterioration in the quality of floor space provision within centre zones representing a sub-optimal outcome from a community perspective.

1.3 Report Structure

This report is structured as follows:

- **Section 1 – Introduction:** this section details the purpose of the study and the structure of the report;
- **Section 2 – Catchment Overview:** this section defines the geographies for assessment and examines the historical and projected population of the catchment areas; dwelling approval trends; the employment profile of the catchment areas; and the impacts of COVID-19 (captured via key economic indicators);
- **Section 3 – Property Market Overview:** this section examines commercial property market sales and attached dwelling sales within the Rockhampton Region, as well as the retail and commercial properties available for rent;

-
- **Section 4 – Centre Supply Assessment:** this section examines the existing retail network within Rockhampton LGA and parts of Livingstone LGA. It also highlights the quantum of floor space available, the anchoring tenants and the quality of floor space within each centre. Focus is also given to approved and proposed centres within these geographies;
 - **Section 5 – Trends and Implications for Centre Provision:** this section examines broader mega-trends (i.e. shifts to online retail, changes to consumer preferences and COVID-19) and the resulting implications for Rockhampton;
 - **Section 6 – Retail Floorspace Demand Assessment:** this section details the annual retail expenditure pool within the defined catchment areas. It also details the supply demand balance for supermarkets and the supply demand balance for total retail. Additionally, focus is also given to net retail expenditure inflows;
 - **Section 7 – Employment Projections:** this section details employment projections by industry for the Central Queensland SA4 and catchments within Rockhampton LGA;
 - **Section 8 – Commercial Office Space Demand Assessment:** this section details sectors that typically utilised commercial office space; provides commercial office employment estimates and commercial office floor space estimates; and examines the supply demand balance of commercial office floor space within Rockhampton LGA;
 - **Section 9 – Stakeholder Consultation:** this section details the broad themes and outcomes that emerged from stakeholder consultation undertaken with key representatives within Rockhampton LGA (i.e. shopping centre management; real estate agents; industry bodies; and key landholders);
 - **Section 10 – Recommendations:** based on the findings in the sections above, this section provides a series of recommendations for the centres network in Rockhampton Regional Council;
 - **Section 11 – References:** this section provides a list of sources referred to throughout the report; and
 - **Section 12 – Appendices:** this section provides supplementary tables and analysis relevant to the study.

Section 2 Catchment Overview

2.1 Catchment Definition

Catchments for centres activity within Rockhampton LGA were defined with regard to the following factors:

- Existing, approved and designated centres network under the Rockhampton Planning Scheme;
- Location, role and function of centres within Rockhampton Regional Council;
- Road network and accessibility of centres, including consideration of any physical or psychological barriers that might impede customers; and
- Geographic boundaries as defined by the Australian Bureau of Statistics.

The catchments identified for the study represent the **core area** that the Rockhampton centres network service on a day to day basis, namely Rockhampton Regional Council and Livingstone Shire Council. It is recognised that higher order services within Rockhampton Regional Council are also accessed by residents within the broader Central Queensland SA4, which includes Central Highlands Regional Council, Gladstone Regional Council and Banana Shire Council.

The catchment areas have been defined at the SA2 level, recognising this is the finest grain for which detailed demographic and socio-economic data is typically available.

The catchment areas are geographically defined as follows:

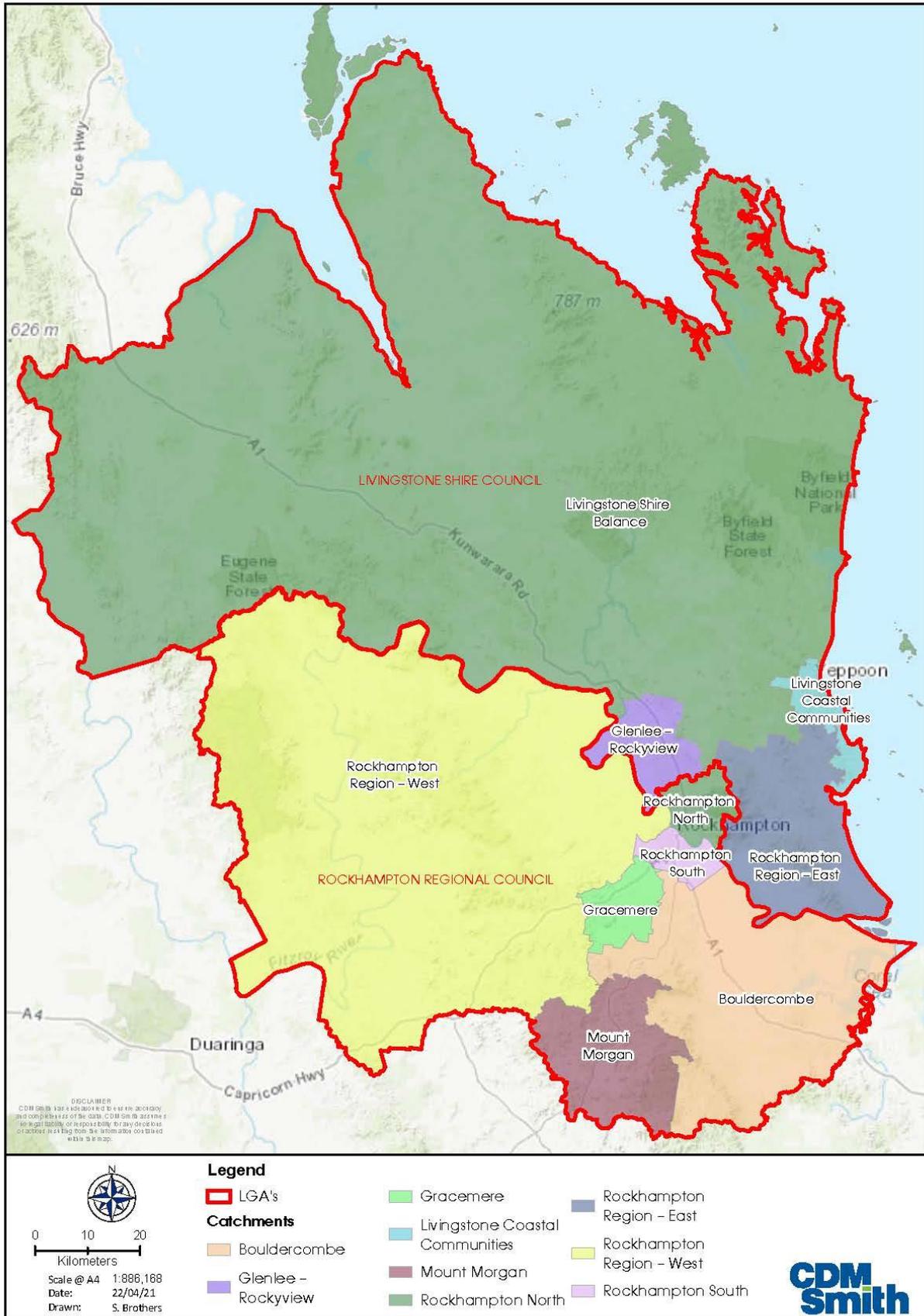
- Rockhampton North, defined by the following SA2s:
 - Parkhurst – Kawana SA2;
 - Park Avenue SA2;
 - Berserker SA2;
 - Lakes Creek SA2;
 - Frenchville – Mount Archer SA2;
 - Norman Gardens SA2;
- Rockhampton South, defined by the following SA2s:
 - Rockhampton – West SA2;
 - The Range – Allentown SA2;
 - Rockhampton City SA2;
- Mount Morgan SA2;
- Gracemere SA2;
- Bouldercombe SA2;
- Rockhampton Region – West SA2;
- Rockhampton Region – East SA2;
- Glenlee – Rockyview SA2 (Livingstone Shire bordering North Rockhampton);
- Livingstone Coastal Communities, defined by the following SA2s:
 - Yeppoon SA2;
 - Emu Park SA2;

-
- Livingstone Shire Balance, defined by the following SA2s:
 - Rockhampton Region – North SA2; and
 - Shoalwater Bay SA2.

The geographical boundaries utilised in the study are illustrated in Figure 2-1 below.

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Figure 2-1 Catchments – Rockhampton Regional Council and Livingstone Shire Council



2.2 Socio-Economic Profile

A targeted, high level assessment of the factors that influence the demand for retail and commercial centres floor space within Rockhampton Regional Council, benchmarked to Central Queensland SA4 and Queensland has been undertaken.

The demographic and socio-economic characteristics of the Rockhampton LGA as at the 2006, 2011 and 2016 Censuses, benchmarked to Central Queensland SA4 and Queensland are summarised below, with a detailed table provided in **Appendix A**.

- At the time of the last two Censuses, the average age of residents within Rockhampton LGA was slightly higher than Central Queensland SA4, but lower than Queensland. The average age in Rockhampton LGA increased from 37.0 years in 2006 to 38.0 years in 2016;
- Over the last three Censuses, Rockhampton LGA and Central Queensland SA4 were characterised by a higher incidence of Aboriginal and/or Torres Strait Islander residents compared to Queensland. As of the 2016 Census, the incidence of Aboriginal and/or Torres Strait Islander residents was 7.4% in Rockhampton LGA and 5.4% in Central Queensland SA4 compared to Queensland at 4.0%;
- In 2016, the average household size across all three areas analysed was 2.6 persons per household. Relative to 2006, where the average household size in Rockhampton LGA was 2.7 persons per household, this represents a marginal decline;
- In the 2006 to 2016 period, the incidences of couple families with children have fallen across all three areas analysed. In 2016, Rockhampton LGA had the lowest incidence of couple families without children and couple families with children, relative to Central Queensland SA4 and Queensland (owing to a higher proportion of single parent families and lone person households);
- Between 2006 and 2016, the incidence of households fully owning a home decreased across all areas analysed. Over the last three Censuses, the incidence of rental households increased in Rockhampton Region by 2.0%, Central Queensland SA4 by 1.7% and Queensland by 2.2%;
- The average weekly rent payment increased between 2006 and 2016 in Rockhampton LGA and Queensland and decreased between 2006 and 2016 in Central Queensland SA4. Average weekly rent in Rockhampton LGA was higher than Central Queensland SA4, but lower than Queensland. As of the 2006 Census, the average weekly rent in Rockhampton LGA was \$159, which increased to \$267 by 2016, representing an average annual increase of 5.3% over 10 years, which was higher than recorded for Central Queensland SA4 (average growth of 4.4% per annum) and Queensland (average of 4.3% per annum) over the same time period. In the March Quarter 2021, median weekly rents for three-bedroom detached dwellings within the Rockhampton Region ranged between \$450 to \$470, with the median weekly rent for two-bedroom units being \$300. Rental vacancy rates in Rockhampton Regional Council have hit record lows and were 0.5% at April 2021 (SQM Research);
- Average monthly housing loan repayments increased significantly between 2006 and 2011 across all areas analysed but decreased in the 2011 to 2016 period for all three areas analysed. As of the 2016 Census, average monthly loan repayments were lower in Rockhampton LGA compared to the benchmark areas analysed;
- Historically, the average weekly household income in Rockhampton LGA has remained below the State average. In 2016, average weekly household incomes were lowest in Rockhampton LGA (\$1,541) relative to Central Queensland SA4 (\$1,707) and Queensland (\$1,699). Accordingly, average housing costs as a proportion of income were lower in Rockhampton LGA relative to the State. Meanwhile, in 2011 and 2016 (where data is available for this indicator), Central Queensland SA4 recorded lower housing average costs as a proportion of income relative to Rockhampton LGA and the State in 2011 and 2016;
- As of the 2016 Census, approximately 17.4% of Rockhampton LGA residents were highly disadvantaged and within the bottom 0-10% of all neighbourhood areas (up from 13.5% in the 2011 Census). This was significantly higher

compared to Central Queensland SA4 (with 11.3% of residents in the bottom 0-10% of all neighbourhood areas) and Central Queensland SA4 (with 9.3% of residents in the bottom 0-10% of all neighbourhoods).

- Over the last three Censuses, Rockhampton LGA exhibited higher unemployment compared to Central Queensland SA4. Relative to Queensland, unemployment in Rockhampton LGA was higher in 2006 and 2016, but lower in 2011. As of the 2016 Census, the unemployment rate in Rockhampton LGA was 9.2% compared to 8.7% in Central Queensland SA4 and 7.6% in Queensland. In the last five years since the Census, the unemployment rate in Rockhampton LGA has typically remained above regional and state averages, and was estimated at 7.1% in the December Quarter 2020 (National Skills Commission, 2021)
- Between 2006 and 2016, the incidence of full-time employment across all areas analysed declined, whilst the incidence of part time employment increased in all areas analysed. Additionally, the labour force participation rate in Rockhampton LGA was lower than the benchmark areas in 2016;
- Between the 2006 and 2016 Censuses, the incidence of persons aged 15 years and over with a post school qualification has increased significantly across all areas analysed. In 2016, the incidence of persons aged 15 years and older with a bachelor degree or higher qualification was higher in Rockhampton LGA relative to Central Queensland SA4 and lower relative to Queensland. Conversely, the incidence of persons with a certificate level qualification in Rockhampton LGA and Central Queensland SA4 were higher than Queensland in 2016;
- In 2016, Rockhampton LGA and Central Queensland SA4 were characterised by a lower incidence of upper white-collar workers relative to Queensland. Conversely, Rockhampton LGA had a higher incidence of lower white-collar workers relative to Central Queensland SA4 and Queensland in 2016. The incidence of blue-collar workers in Rockhampton LGA was lower than Central Queensland SA4, but higher than Queensland in 2016.
- As of the 2016 Census, residents in the Rockhampton LGA, Central Queensland SA4 and Queensland were most likely to be employed by the health care and social assistance industry and the retail trade industry. The latest labour force region data published by the ABS (February 2021) indicates that the incidence of employment in retail trade has declined in both Central Queensland SA4 and Queensland, whereas the incidence of employment in the health care and social assistance sector has continued to grow. The Central Queensland SA4 has also recorded significant growth in the incidence of persons employed within the agriculture, forestry and fishing, mining and manufacturing sectors subsequent to the 2016 Census;

2.3 Population & Households

2.3.1 Historic Population

As at 30 June 2020, the estimated residential population of all Catchment areas was 120,616 (up 9,517 persons or 8.6% relative to 2010). The population amongst these Catchments is distributed as follows:

- Rockhampton North – 44,182;
- Rockhampton South – 17,086;
- Mount Morgan – 2,957;
- Gracemere – 13,053;
- Bouldercombe – 1,781;
- Rockhampton Region – West – 2,940;
- Rockhampton Region – East – 3,322;
- Glenlee – Rockyview – 5,281;
- Livingstone Coastal Communities – 25,559; and
- Livingstone Shire Balance – 4,455.

Across a ten-year timeframe, strong population growth was recorded in Livingstone Coastal Communities (up 4,619 persons), Gracemere (up 4,333 persons) and Rockhampton North (up 939 persons). Meanwhile, a decline in population was observed for Rockhampton South (down 1,377 persons), Mount Morgan (down 144 persons) and Bouldercombe (down 138 persons).

All other areas (Rockhampton Region – West, Rockhampton Region – East, Glenlee – Rockyview and Livingstone Shire Balance) recorded low but positive population growth, ranging within the order of 0.4% to 1.5%.

Table 2-1 Historic Population by Catchment Area, 2010 to 2020

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	Ave. Ann Growth, 2010-20 (%)
Rockhampton North	43,243	43,535	44,201	44,743	44,491	44,231	43,791	43,776	43,653	43,887	44,182	0.2%
Rockhampton South	18,463	18,550	18,711	18,573	18,373	18,083	17,783	17,633	17,396	17,239	17,086	-0.8%
Mount Morgan	3,101	3,102	3,118	3,150	3,123	3,075	2,961	2,931	2,928	2,931	2,957	-0.5%
Gracemere	8,720	9,066	9,750	10,474	11,261	11,743	11,957	12,134	12,390	12,758	13,053	4.1%
Bouldercombe	1,919	1,915	1,942	1,933	1,945	1,936	1,883	1,814	1,800	1,799	1,781	-0.7%
Rockhampton Region - West	2,747	2,771	2,833	2,872	2,943	2,958	2,947	2,905	2,884	2,898	2,940	0.7%
Rockhampton Regional Council	78,193	78,939	80,555	81,745	82,136	82,026	81,322	81,193	81,051	81,512	81,999	0.5%
Rockhampton Region - East	3,178	3,184	3,253	3,331	3,425	3,465	3,476	3,451	3,404	3,345	3,322	0.4%
Glenlee - Rockyview	4,569	4,579	4,639	4,736	4,971	5,052	5,067	5,145	5,136	5,197	5,281	1.5%
Livingstone Coastal Communities	20,940	21,476	22,265	22,932	23,359	23,758	24,084	24,355	24,746	25,162	25,559	2.0%
Livingstone Shire Balance	4,219	4,155	4,224	4,280	4,308	4,304	4,323	4,335	4,343	4,374	4,455	0.5%
Livingstone Shire Council	32,906	33,394	34,381	35,279	36,063	36,579	36,950	37,286	37,629	38,078	38,617	1.6%

Source: ABS (2021), Regional Population, Cat. No. 3218.0, Australian Bureau of Statistics, Canberra

2.3.2 Population Projections

Population projections have been prepared taking into consideration the latest (2018 edition) Queensland Government Statisticians Office (QGSO) medium series projections, rebased to consider the latest estimated resident population estimates published by the Australian Bureau of Statistics (2020 estimated resident population data).

By 2041, the Catchment areas are projected to grow to a total population of 157,857 (up 37,241 persons relative to 2020), representing an AAGR of 1.3% between 2020 and 2041. Population growth (in percentage terms) is expected to be highest in Gracemere with an average annual growth rate (AAGR) of 2.7%; followed by Livingstone Coastal Communities at an AAGR of 2.3% and Rockhampton Region – East at an AAGR of 1.2% between 2020 and 2041.

As of the 2016 Census, average household size was highest in Glenlee - Rockyview (3.4 persons per household), whilst average household size was lowest in Mount Morgan (2.2 persons per household). For this analysis, the average household size across all Catchment areas is assumed to decrease at a rate of 0.1% per annum between 2016 and 2041. Thus, the average household size in all Catchment areas is expected to range between 2.1 persons per household and 3.4 persons per household by 2041. Based on this assumption, there were approximately 46,835 households across all Catchment areas in 2020, with the number of households being distributed as follows:

- Rockhampton North – 17,132;
- Rockhampton South – 6,856;
- Mount Morgan – 1,360;
- Gracemere – 4,565;
- Bouldercombe – 686;
- Rockhampton Region - West – 1,073;
- Rockhampton Region - East – 1,261;
- Glenlee - Rockyview – 1,532;
- Livingstone Coastal Communities – 10,631; and
- Livingstone Shire Balance – 1,739.

Accordingly, household growth is expected to be highest (in percentage terms) in Gracemere with an average annual growth rate (AAGR) of 2.8%; followed by Livingstone Coastal Communities at an AAGR of 2.4% and Rockhampton Region – East at an AAGR of 1.3% between 2020 and 2041. By 2041, the Catchment areas are projected to grow to a total of 62,609 households (up 15,775 households relative to 2020), representing an AAGR of 1.4% between 2020 and 2041.

Table 2-2 Population and Household Projections by Catchment, 2020-41

	2020	2021	2026	2031	2036	2041	AAGR, 2020-41 (%)
Population							
Rockhampton North	44,182	44,557	46,685	49,012	51,192	53,707	0.9%
Rockhampton South	17,086	17,031	16,963	17,006	17,027	16,998	0.0%
Mount Morgan	2,957	2,963	2,966	2,982	3,011	3,043	0.1%
Gracemere	13,053	13,316	15,200	17,355	20,026	22,861	2.7%
Bouldercombe	1,781	1,786	1,816	1,826	1,843	1,867	0.2%
Rockhampton Region - West	2,940	2,942	3,054	3,199	3,343	3,482	0.8%
Rockhampton Regional Council	81,999	82,595	86,684	91,381	96,442	101,959	1.0%
Rockhampton Region - East	3,322	3,316	3,512	3,756	4,008	4,260	1.2%
Glenlee - Rockyview	5,281	5,290	5,372	5,433	5,489	5,564	0.2%
Livingstone Coastal Communities	25,559	25,928	28,890	32,980	37,543	41,463	2.3%
Livingstone Shire Balance	4,455	4,436	4,436	4,490	4,549	4,610	0.2%
Livingstone Shire Council	38,617	38,970	42,210	46,659	51,590	55,898	1.8%
No. of Households							
Rockhampton North	17,132	17,295	18,211	19,215	20,170	21,267	1.0%
Rockhampton South	6,856	6,841	6,848	6,900	6,943	6,966	0.1%
Mount Morgan	1,360	1,364	1,372	1,386	1,407	1,429	0.2%
Gracemere	4,565	4,661	5,348	6,136	7,116	8,164	2.8%
Bouldercombe	686	689	704	712	722	735	0.3%
Rockhampton Region - West	1,073	1,075	1,121	1,180	1,239	1,297	0.9%

	2020	2021	2026	2031	2036	2041	AAGR, 2020-41 (%)
Rockhampton Regional Council	31,672	31,924	33,604	35,529	37,597	39,859	1.1%
Rockhampton Region - East	1,261	1,260	1,341	1,441	1,546	1,651	1.3%
Glenlee - Rockyview	1,532	1,536	1,568	1,593	1,618	1,649	0.3%
Livingstone Coastal Communities	10,631	10,795	12,089	13,870	15,868	17,613	2.4%
Livingstone Shire Balance	1,739	1,733	1,742	1,772	1,804	1,838	0.3%
Livingstone Shire Council	15,163	15,325	16,740	18,677	20,836	22,750	2.0%
Average Household Size							
Rockhampton North	2.6	2.6	2.6	2.6	2.5	2.5	-0.1%
Rockhampton South	2.5	2.5	2.5	2.5	2.5	2.4	-0.1%
Mount Morgan	2.2	2.2	2.2	2.2	2.1	2.1	-0.1%
Gracemere	2.9	2.9	2.8	2.8	2.8	2.8	-0.1%
Bouldercombe	2.6	2.6	2.6	2.6	2.6	2.5	-0.1%
Rockhampton Region - West	2.7	2.7	2.7	2.7	2.7	2.7	-0.1%
Rockhampton Regional Council	2.6	2.6	2.6	2.5	2.5	2.5	-0.1%
Rockhampton Region - East	2.6	2.6	2.6	2.6	2.6	2.6	-0.1%
Glenlee - Rockyview	3.4	3.4	3.4	3.4	3.4	3.4	-0.1%
Livingstone Coastal Communities	2.4	2.4	2.4	2.4	2.4	2.4	-0.1%
Livingstone Shire Balance	2.6	2.6	2.5	2.5	2.5	2.5	-0.1%
Livingstone Shire Council	2.8	2.8	2.7	2.7	2.7	2.7	-0.1%

Source: ABS (2021), Regional Population, Cat. No. 3218.0, Australian Bureau of Statistics, Canberra; ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra; and QGSO (2018), Projected population, by five-year age group and sex, Queensland and regions, 2016 to 2041, Queensland Government, Brisbane

2.4 Dwelling Approvals

The Australian Bureau of Statistics (ABS) reports residential building approvals data at the SA2 level, with the 2011-12 financial year being the earliest accessible records for this geographic boundary. This analysis has considered building approvals for new houses (attached) and new other (detached).

As at 2019-20, there were 143 dwelling approvals in Rockhampton Regional Council (down 149 dwelling approvals relative to 2011-12) and 207 dwelling approvals in Livingstone Shire Council (up 2 dwelling approvals relative to 2011-12). Detached approvals accounted for the majority of dwelling approvals in Rockhampton Regional Council (140 approvals) and Livingstone Shire Council (189 approvals) in 2019-20.

Across the assessment timeframe, detached dwelling approvals accounted for an average of 80.3% of total approvals, whilst attached dwelling approvals accounted for an average of 19.7% of total approvals in Rockhampton Regional Council. Similarly, attached dwelling approvals accounted for an average of 86.1% of total approvals, whilst attached dwelling approvals accounted for an average of 13.9% of total approvals in Livingstone Shire Council.

Cumulatively, the Livingstone Coastal Communities Catchment underpinned detached dwelling approvals in Livingstone Shire Council, with 1,376 detached dwelling approvals recorded between 2011-12 and 2019-20. Meanwhile, the Rockhampton North Catchment recorded the second highest cumulative total of detached dwelling approvals in Rockhampton Regional Council, with 1,021 detached dwelling approvals recorded between 2011-12 and 2019-20. The Gracemere Catchment also recorded a significant number of detached dwelling approvals, peaking with 322 detached dwelling approvals in 2012-13 and contributing a cumulative total of 815 detached dwelling approvals to Rockhampton Regional Council between 2011-12 and 2019-20.

As for attached dwelling approvals, only Rockhampton North (165 approvals), Rockhampton South (234 approvals) and Gracemere (109) recorded attached dwelling approvals throughout the assessment timeframe in Rockhampton Regional Council. The majority of attached approvals in Rockhampton Regional Council were situated west of the Rockhampton CBD. Similarly, only the Livingstone Coastal Communities Catchment (269 approvals) recorded attached dwelling approvals throughout the assessment timeframe in Livingstone Shire Council.

The number of detached dwelling approvals in Rockhampton Regional Council were significantly lower in the past three years relative to longer term averages. Attached dwelling approvals were also relatively low in Rockhampton Regional Council over the past two years, with only three approvals recorded in 2019-20.

Dwelling approvals by Catchment and LGA are denoted in Table 2-4.

Table 2-3 Dwelling Approvals by Catchment, 2011-12 to 2019-20

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
<i>Detached Approvals</i>									
Rockhampton North	54	88	166	165	153	109	114	73	99
Rockhampton South	17	7	11	17	24	29	4	7	8
Mount Morgan	1	6	2	1	1	2	0	4	2
Gracemere	184	322	54	51	56	75	41	10	22
Bouldercombe	7	8	0	3	3	2	1	2	4
Rockhampton Region - West	11	9	7	3	6	9	4	5	5
Rockhampton Regional Council	274	440	240	240	243	226	164	101	140
Rockhampton Region - East	17	13	8	12	10	6	13	8	11
Glenlee - Rockyview	18	17	20	13	19	6	4	9	11
Livingstone Coastal Communities	152	184	190	155	182	161	111	88	153
Livingstone Shire Balance	4	8	3	7	8	11	6	9	14

	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Livingstone Shire Council	191	222	221	187	219	184	134	114	189
Attached Approvals									
Rockhampton North	2	46	6	26	12	4	69	0	0
Rockhampton South	5	40	73	16	13	62	0	22	3
Mount Morgan	0	0	0	0	0	0	0	0	0
Gracemere	11	82	10	0	2	2	2	0	0
Bouldercombe	0	0	0	0	0	0	0	0	0
Rockhampton Region - West	0	0	0	0	0	0	0	0	0
Rockhampton Regional Council	18	168	89	42	27	68	71	22	3
Rockhampton Region - East	0	0	0	0	0	0	0	0	0
Glenlee - Rockyview	0	0	0	0	0	0	0	0	0
Livingstone Coastal Communities	14	70	59	58	8	6	6	30	18
Livingstone Shire Balance	0	0	0	0	0	0	0	0	0
Livingstone Shire Council	14	70	59	58	8	6	6	30	18
Total Approvals									
Rockhampton North	56	134	172	191	165	113	183	73	99
Rockhampton South	22	47	84	33	37	91	4	29	11
Mount Morgan	1	6	2	1	1	2	0	4	2
Gracemere	195	404	64	51	58	77	43	10	22
Bouldercombe	7	8	0	3	3	2	1	2	4
Rockhampton Region - West	11	9	7	3	6	9	4	5	5
Rockhampton Regional Council	292	608	329	282	270	294	235	123	143
Rockhampton Region - East	17	13	8	12	10	6	13	8	11
Glenlee - Rockyview	18	17	20	13	19	6	4	9	11
Livingstone Coastal Communities	166	254	249	213	190	167	117	118	171
Livingstone Shire Balance	4	8	3	7	8	11	6	9	14
Livingstone Shire Council	205	292	280	245	227	190	140	144	207

Source: ABS (2020), Building Approvals, Australia, Cat. No. 8731.0, Australian Bureau of Statistics, Canberra

2.5 Employment

2.5.1 Resident Place of Work

In absolute terms, Rockhampton North had the largest number of employed residents (18,148 persons), followed by Livingstone Coastal Communities (9,079 persons) and Gracemere (4,746 persons) in 2016. Table 2-5 denotes the most prominent places of work at the SA2 level in 2016. SA2s that figure prominently in Catchments are as follows:

- Rockhampton City SA2 (10 out of 10 Catchments);
- Parkhurst – Kawana SA2 (10 out of 10 Catchments);
- The Range – Allentown SA2 (8 out of 10 Catchments);
- Berserker SA2 (5 out of 10 Catchments);
- Gracemere SA2 (4 out of 10 Catchments);

- Park Avenue SA2 (4 out of 10 Catchments); and
- Yeppoon SA2 (3 out of 10 Catchments).

Further detail on the place of work distribution for Catchment residents is available in **Appendix A**.

Table 2-4 Catchment Residents – Place of Work, 2016

Catchment Place of Usual Residence	Resident Workforce Size	Place of Work (SA2)
Rockhampton North	18,148	<ul style="list-style-type: none"> • Rockhampton City (21.0%); • Parkhurst – Kawana (16.1%); • Berserker (11.3%); • Park Avenue (9.4%); and • The Range – Allenstown (9.0%).
Rockhampton South	6,888	<ul style="list-style-type: none"> • Rockhampton City (31.7%); • The Range - Allenstown (22.6%); • Parkhurst - Kawana (8.2%); • Rockhampton - West (6.2%); and • Berserker (6.0%).
Mount Morgan	710	<ul style="list-style-type: none"> • Mount Morgan (43.2%); • Rockhampton City (10.4%); • Parkhurst – Kawana (7.3%); • Gracemere (7.2%); and • The Range – Allenstown (5.5%).
Gracemere	4,746	<ul style="list-style-type: none"> • Gracemere (22.4%); • Rockhampton City (21.8%); • The Range – Allenstown (11.7%); • Parkhurst – Kawana (8.5%); and • Park Avenue (5.6%).
Bouldercombe	745	<ul style="list-style-type: none"> • Bouldercombe (24.6%); • Rockhampton City (18.0%); • The Range – Allenstown (8.5%); • Gracemere (7.9%); • Parkhurst – Kawana (7.2%); • Central Highlands – East (5.1%); • Berserker (5.1%); and • Park Avenue (5.1%).
Rockhampton Region - West	1,344	<ul style="list-style-type: none"> • Rockhampton Region - West (30.9%); • Rockhampton City (18.6%); • The Range – Allenstown (8.5%); • Parkhurst – Kawana (7.3%); and • Gracemere (5.7%).

Catchment Place of Usual Residence	Resident Workforce Size	Place of Work (SA2)
Rockhampton Region - East	1,350	<ul style="list-style-type: none"> Rockhampton Region - East (21.9%); Rockhampton City (13.2%); Yeppoon (12.3%); Parkhurst – Kawana (9.6%); Berserker (5.9%); and The Range - Allenstown (5.5%).
Glenlee - Rockyview	2,157	<ul style="list-style-type: none"> Rockhampton City (19.7%); Parkhurst – Kawana (19.2%); Glenlee – Rockyview (12.7%); Berserker (7.8%); The Range - Allenstown (7.7%); Park Avenue (7.1%); and Norman Gardens (5.0%).
Livingstone Coastal Communities	9,079	<ul style="list-style-type: none"> Yeppoon (45.8%); Rockhampton City (9.5%); Emu Park (7.4%); and Parkhurst – Kawana (5.9%).
Livingstone Shire Balance	1,757	<ul style="list-style-type: none"> Rockhampton Region – North (38.1%); Yeppoon (26.2%); Rockhampton City (5.8%); and Parkhurst – Kawana (5.4%).

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

Rockhampton North and Rockhampton South represent the core employment areas for residents (most travelled to) across the 10 catchments identified. For catchments that are situated outside of the Rockhampton LGA, there is some reliance on Rockhampton North and Rockhampton South for employment, however, residents in the Livingstone Coastal Communities and Livingstone Shire Balance catchments are more reliant on the Livingstone Coastal Communities catchment for employment. Contrarily, despite Bouldercombe being situated relatively far from Central Highlands LGA (an LGA that is directly west of Rockhampton LGA), an SA2 within Central Highlands LGA was responsible for a small proportion of employment in Bouldercombe.

A summary of journey to work trends for catchment residents is as follows:

- Rockhampton North:** Out of the five most common places of work for residents in Rockhampton North, at least 30.0% of employed residents travelled south across the Fitzroy River to attend work, whilst the remaining three most common places of work for residents in Rockhampton North were contained within Rockhampton North in 2016 (at least 36.8%);
- Rockhampton South:** Out of the five most common places of work for residents in Rockhampton South, at least 14.2% of employed residents travelled north across the Fitzroy River to attend work, whilst the remaining three most common places of work for residents in Rockhampton South were contained within Rockhampton South (at least 60.5%) in 2016;
- Mount Morgan:** Most residents that lived in Mount Morgan also worked in Mount Morgan (over two-fifths or 43.2%) in 2016. The next four most common places of work for employed Mount Morgan residents were geographically north of Mount Morgan, extending from Gracemere to SA2s contained in Rockhampton South and over the Fitzroy River to an SA2 contained in Rockhampton North in 2016;

- **Gracemere:** Just over one-fifth of residents that lived in Gracemere also worked in Gracemere (22.4%) in 2016. The next most common places of work were directly north of Gracemere, extending from SA2s contained in Rockhampton South to across the Fitzroy River to an SA2 contained in Rockhampton North in 2016;
- **Bouldercombe:** Almost one-quarter (or 24.6%) of residents that lived in Bouldercombe also worked in Bouldercombe in 2016. The other most common places of work were in catchments located north of Bouldercombe, extending north to Gracemere, SA2s in Rockhampton South and over the Fitzroy River to SA2s in Rockhampton North. Contrastingly, an SA2 within the Central Highlands LGA (adjacent to and west of Rockhampton LGA) also featured as a common place of work;
- **Rockhampton Region - West:** Most residents that lived in Rockhampton Region - West also worked in Rockhampton Region - West (30.9%) in 2016. The next four most common places of work for employed Rockhampton Region - West residents were in Gracemere and SA2s contained within Rockhampton South and an SA2 in Rockhampton North;
- **Rockhampton Region - East:** Just over one-fifth of residents that lived in Rockhampton Region - East also worked in Rockhampton Region - East (21.9%) in 2016. The next five most common places of work for employed Rockhampton Region - East residents were in an SA2 in Livingstone Coastal Communities, SA2s within Rockhampton North and south across the Fitzroy River to an SA2 in Rockhampton South;
- **Glenlee - Rockyview:** The most common places of work for residents in Glenlee - Rockyview were in SA2s contained within Rockhampton North (at least 39.1%), south across the river to SA2s contained within Rockhampton South (at least 27.4%) and Glenlee - Rockyview (12.7%) in 2016;
- **Livingstone Coastal Communities:** Most residents that lived in Livingstone Coastal Communities also worked in Livingstone Coastal Communities (53.2%) in 2016. The other two most common places of work for employed residents in Livingstone Coastal Communities were in an SA2 in Rockhampton North and south across the Fitzroy River to an SA2 within Rockhampton South; and
- **Livingstone Shire Balance:** The most common places of work for residents in Livingstone Shire Balance were in Livingstone Shire Balance (at least 38.1%), an SA2 in Livingstone Coastal Communities, an SA2 in Rockhampton North and south across the Fitzroy River to an SA2 in Livingstone Shire Balance in 2016.

As outlined above, residents in most catchments worked locally (did not travel very far for work) in 2016.

2.5.2 Workforce Origin

In absolute terms, Rockhampton North had the largest workforce (16,280 persons), followed by Rockhampton South (15,819 persons) and Livingstone Coastal Communities (6,010 persons) in 2016.

Table 2-6 denotes the most prominent places of usual residence for workers in the Catchment at the SA2 level in 2016. SA2s that figure prominently in Catchments are as follows:

- Gracemere SA2 (5 out of 10 Catchments);
- Norman Gardens SA2 (5 out of 10 Catchments);
- Frenchville – Mount Archer SA2 (4 out of 10 Catchments);
- Rockhampton – West SA2 (2 out of 10 Catchments); and
- The Range – Allenstown SA2 (2 out of 10 Catchments).

Further detail on the workforce origin distribution within the Catchment is available in **Appendix A**.

Table 2-5 SA2 of Origin – Catchment Workforce, 2016

Catchment Place of Work	Workforce Size	Place of Residence (SA2)
Rockhampton North	16,280	<ul style="list-style-type: none"> Norman Gardens (14.4%); Frenchville – Mount Archer (13.0%); and Parkhurst – Kawana (9.3%).
Rockhampton South	15,819	<ul style="list-style-type: none"> The Range - Allenstown (13.1%); Gracemere (10.7%); Norman Gardens (9.5%); Rockhampton – West (9.3%); and Frenchville – Mount Archer (9.1%).
Mount Morgan	425	<ul style="list-style-type: none"> Mount Morgan (72.2%); Gracemere (6.6%); and Frenchville – Mount Archer (3.3%).
Gracemere	1,988	<ul style="list-style-type: none"> Gracemere (53.5%); The Range – Allenstown (4.1%); and Rockhampton Region – West (3.9%).
Bouldercombe	425	<ul style="list-style-type: none"> Bouldercombe (43.1%); Gracemere (15.1%); and Frenchville – Mount Archer (4.7%).
Rockhampton Region - West	939	<ul style="list-style-type: none"> Rockhampton Region - West (44.2%); Gracemere (9.4%); and Norman Gardens (5.9%).
Rockhampton Region - East	808	<ul style="list-style-type: none"> Rockhampton Region - East (36.6%); Lakes Creek (9.9%); and Norman Gardens (8.7%).
Glenlee - Rockyview	831	<ul style="list-style-type: none"> Glenlee - Rockyview (33.1%); Yeppoon (9.7%); and Norman Gardens (8.8%).
Livingstone Coastal Communities	6,010	<ul style="list-style-type: none"> Yeppoon (66.1%); Emu Park (14.3%); Rockhampton Region - North (7.9%); and Rockhampton Region - East (3.3%).
Livingstone Shire Balance	1,043	<ul style="list-style-type: none"> Yeppoon (66.1%); Emu Park (14.3%); Rockhampton Region - North (7.9%); and Rockhampton Region - East (3.3%).

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

There was a large degree of self-containment amongst the 10 identified catchments (i.e. most workers that worked in a certain catchment also lived within the catchment). Nonetheless, the most prominent places of usual residence for workers across all 10 identified catchments were Rockhampton North, Rockhampton South, Gracemere and Livingstone Coastal Communities in 2016. The Livingstone Coastal Communities catchment and Livingstone Shire Balance catchment did not rely strongly on SA2s in Rockhampton LGA for employment, with Livingstone Coastal Communities representing the core employment area for residents in these two catchments in 2016.

A summary of worker origin trends for each catchment is as follows:

- **Rockhampton North:** Attracted workers predominantly from SA2s contained within Rockhampton North in 2016;
- **Rockhampton South:** Attracted workers predominantly from an SA2 in Rockhampton South, as well as workers that live directly south of the catchment in Gracemere and north of the catchment across the Fitzroy River to SA2s contained within Rockhampton North in 2016;
- **Mount Morgan:** Attracted workers predominantly from Mount Morgan, as well as workers that live directly north of the catchment in Gracemere and further north across the Fitzroy River to an SA2 in Rockhampton North in 2016;
- **Gracemere:** Attracted workers predominantly from Gracemere, an SA2 in Rockhampton South (north of Gracemere) and from Rockhampton Region - West (west of Gracemere) in 2016;
- **Bouldercombe:** Attracted workers predominantly from Bouldercombe, Gracemere (largely north of Bouldercombe) and an SA2 in Rockhampton North (further north across the Fitzroy River) in 2016;
- **Rockhampton Region - West:** Attracted workers predominantly from Rockhampton Region - West, as well as workers that live directly east of the catchment in Gracemere and further north across the Fitzroy River to an SA2 in Rockhampton North in 2016;
- **Rockhampton Region - East:** Attracted workers predominantly from Rockhampton Region - East, as well as workers that live directly east of the catchment in SA2s contained within Rockhampton North in 2016;
- **Glenlee - Rockyview:** Attracted workers predominantly from Glenlee - Rockyview, as well as workers that live directly south of the catchment in an SA2s in Rockhampton North and further east from the catchment in an SA2 contained within Livingstone Coastal Communities in 2016;
- **Livingstone Coastal Communities:** Attracted workers predominantly from Livingstone Coastal Communities, as well as workers from catchments that are directly adjacent (i.e. from an SA2 in Livingstone Shire Balance catchment and the Rockhampton Region – East catchment) in 2016; and
- **Livingstone Shire Balance:** Attracted workers predominantly from adjacent catchments (i.e. Livingstone Coastal Communities and Rockhampton Region - East), along with residents from an SA2 within Livingstone Shire Balance) in 2016.

As outlined above, most workers attracted to the catchments lived close by in 2016.

2.5.3 Occupation Profile

Based on the three most common occupations within each catchment in 2016, the catchments that were mostly white collar or blue collar (based on place of work and place of usual residence) are as follows:

- **Mostly white collar:** Rockhampton North, Rockhampton South, Mount Morgan, Glenlee – Rockyview and Livingstone Coastal Communities; and
- **Mostly blue collar:** Gracemere, Bouldercombe, Rockhampton Region - West, Rockhampton Region - East and Livingstone Shire Balance.

It appears as though the catchments that were denser in terms of population, built form and service amenity were more likely to record a higher proportion of white collar workers in 2016, whilst the catchments that were geographically very large, quite rural and thus were less dense in terms of population, built form and service amenity were more likely to record a higher proportion of blue collar workers in 2016.

A summary of trends in occupation by place of work and catchment in 2016 is as follows:

- **Rockhampton North:** Workers were predominantly employed as technicians and trades workers; professionals; and sales workers;
- **Rockhampton South:** Workers were predominantly employed as professionals; clerical and administrative workers; and community and personal service workers;

- **Mount Morgan:** Workers were predominantly employed as community and personal service workers; professionals; and labourers;
- **Gracemere:** Workers were predominantly employed as machinery operators and drivers; technicians and trades workers; and labourers;
- **Bouldercombe:** Workers were predominantly employed as managers; machinery operators and drivers; and labourers;
- **Rockhampton Region - West:** Workers were predominantly employed as managers; technicians and trades workers; and machinery operators and drivers;
- **Rockhampton Region - East:** Workers were predominantly employed as labourers; managers and technicians and trades workers;
- **Glenlee - Rockyview:** Workers were predominantly employed as community and personal service workers; professionals and clerical and administrative workers;
- **Livingstone Coastal Communities:** Workers were predominantly employed as community and personal service workers; professionals and technicians and trades workers; and
- **Livingstone Shire Balance:** Workers were predominantly employed as managers; labourers and technicians and trades workers.

Appendix A details the distribution of occupations by place of work within each catchment in 2016.

A summary of trends in occupation by place of usual residence and catchment in 2016 is as follows:

- **Rockhampton North:** Workers were predominantly employed as technicians and trades workers; professionals; and clerical and administrative workers;
- **Rockhampton South:** Workers were predominantly employed as professionals; technicians and trades workers; and community and personal service workers;
- **Mount Morgan:** Workers were predominantly employed as community and personal service workers; professionals; and labourers;
- **Gracemere:** Workers were predominantly employed as labourers; machinery operators and drivers; and technicians and trades workers;
- **Bouldercombe:** Workers were predominantly employed as technicians and trades workers; machinery operators and drivers; labourers and managers;
- **Rockhampton Region - West:** Workers were predominantly employed as managers; technicians and trades workers; and labourers;
- **Rockhampton Region - East:** Workers were predominantly employed as technicians and trades workers; machinery operators and drivers; and professionals;
- **Glenlee - Rockyview:** Workers were predominantly employed as technicians and trades workers; clerical and administrative workers; and professionals;
- **Livingstone Coastal Communities:** Workers were predominantly employed as technicians and trades workers; professionals; community and personal service workers; and
- **Livingstone Shire Balance:** Workers were predominantly employed as managers; technicians and trades workers; and labourers.

Appendix A details the distribution of occupations by place of usual residence within each catchment in 2016.

2.5.4 Industry of Employment

The industries of education and training; retail; construction; and health care and social assistance figured prominently across several catchments in 2016. A summary of trends in employment by industry and place of work within each catchment in 2016 is as follows:

- **Rockhampton North:** Workers were predominantly employed in the industries of retail trade; education and training and health care and social assistance;
- **Rockhampton South:** Workers were predominantly employed in the industries of health care and social assistance; public administration and safety; and retail trade;
- **Mount Morgan:** Workers were predominantly employed in the industries of health care and social assistance; education and training; and retail trade;
- **Gracemere:** Workers were predominantly employed in the industries of transport, postal and warehousing; retail trade; and construction;
- **Bouldercombe:** Workers were predominantly employed in the industries of manufacturing; agriculture, forestry and fishing; and construction;
- **Rockhampton Region - West:** Workers were predominantly employed in the industries of agriculture, forestry and fishing; electricity, gas, water and waste services; and transport, postal and warehousing;
- **Rockhampton Region - East:** Workers were predominantly employed in the industries of manufacturing; agriculture, forestry and fishing; and construction;
- **Glenlee - Rockyview:** Workers were predominantly employed in the industries of public administration and safety; education and training; and construction;
- **Livingstone Coastal Communities:** Workers were predominantly employed in the industries of retail trade; health care and social assistance; and education and training; and
- **Livingstone Shire Balance:** Workers were predominantly employed in the industries of agriculture, forestry and fishing; accommodation and food services; construction; and education and training.

Appendix A details the distribution of employment by industry and place of work within each catchment in 2016

The industries of health care and social assistance; and education and training (i.e. largely public sector industries) figured prominently across several catchments in 2016. A summary of trends in employment by industry and place of usual residence within each catchment in 2016 is as follows:

- **Rockhampton North:** Workers were predominantly employed in the industries of health care and social assistance; retail trade; and education and training;
- **Rockhampton South:** Workers were predominantly employed in the industries of health care and social assistance; education and training; and accommodation and food services;
- **Mount Morgan:** Workers were predominantly employed in the industries of health care and social assistance; public administration and safety; and retail trade;
- **Gracemere:** Workers were predominantly employed in the industries of health care and social assistance; retail trade; and mining;
- **Bouldercombe:** Workers were predominantly employed in the industries of transport, postal and warehousing; health care and social assistance; and mining;
- **Rockhampton Region - West:** Workers were predominantly employed in the industries of agriculture, forestry and fishing; construction; and mining;
- **Rockhampton Region - East:** Workers were predominantly employed in the industries of construction; education and training; and health care and social assistance;

- **Glenlee - Rockyview:** Workers were predominantly employed in the industries of health care and social assistance; retail trade; and education and training;
- **Livingstone Coastal Communities:** Workers were predominantly employed in the industries of health care and social assistance; education and training; mining; and retail trade; and
- **Livingstone Shire Balance:** Workers were predominantly employed in the industries of agriculture forestry and fishing; construction; and education and training.

Appendix A details the distribution of employment by industry and place of work within each catchment in 2016.

2.5.5 Employment Retention

Employment retention within a catchment can be determined via measuring the number of workers by place of work against the number of workers by place of usual residence. In this instance, a rate/ratio that is greater than 100% is equal to a net inflow; and a rate/ratio that is less than 100% is equal to a net outflow. Rockhampton South recorded a high net inflow of workers in 2016, with this largely being attributable to Rockhampton City being situated within this Catchment. Meanwhile, the nine (9) remaining Catchments all recorded a net outflow of workers in 2016, with outflows being largest in the Glenlee – Rockyview Catchment (i.e. very low employment retention).

In 2016, the largest net inflows within each catchment pertained to the following sector(s):

- **Rockhampton North:** electricity, gas, water and waste services; and retail trade;
- **Rockhampton South:** financial and insurance services; and public administration and safety;
- **Mount Morgan:** financial and insurance services; and rental, hiring and real estate services;
- **Gracemere:** nil;
- **Bouldercombe:** manufacturing; and agriculture, forestry and fishing;
- **Rockhampton Region - West:** electricity, gas, water and waste services; and transport, postal and warehousing;
- **Rockhampton Region - East:** manufacturing; and agriculture, forestry and fishing;
- **Glenlee - Rockyview:** public administration and safety;
- **Livingstone Coastal Communities:** nil; and
- **Livingstone Shire Balance:** agriculture, forestry and fishing.

Appendix A details the net inflows and net outflows of employment by industry within each catchment in 2016.

2.6 Impacts of COVID-19

Beginning in early 2020, Australia, like most of the world, has been gripped by the outbreak of the COVID-19 pandemic. In attempting to mitigate the spread of the virus, states and the Federal Government have introduced various physical distancing policies, travel restrictions and health protocols. The introduction of such policies combined with general uncertainty has resulted in substantial negative impact on economic activity. In response, Economy ID published various economic data (comparing September Quarter 2019 to September Quarter 2020) to show the economic and industry impacts at the LGA level, including that for the Rockhampton Regional Council.

This section will focus on the impact of COVID-19 on the following economic factors, based on data provided by Economy ID:

- Overview of GRP, Local Jobs and Employed Residents;
- Output;
- Value Added;

- Local Jobs Change; and
- Employed Residents.

2.6.1.1 Overview of Rockhampton Region Economy

Economy ID data indicates between September Quarter 2019 and September Quarter 2020, the Gross Regional Product (GRP) value of Rockhampton Region decreased by approximately 6.4%. This decrease was significantly higher than that recorded for Regional Queensland, State and Nation. Similarly, the number of local jobs in the Rockhampton Region decreased by some 4.0% in the September Quarter of 2020, this was marginally higher than that for Regional Queensland and Australia. However, the number of employed residents in the Rockhampton Region increased by 1.0% in the September Quarter 2020, whereas, the benchmark areas all recorded a decrease in the number of employed residents. However, the full impact of COVID-19 on local and resident employment was largely offset by JobKeeper payments, introduced by the Federal Government in March 2020 to combat the growing unemployment.

Table 2-12 below summaries the impact of COVID-19 on key economic indicators in Rockhampton Region, Regional Queensland, Queensland and Australia.

Table 2-6 Overview of GRP, Local Jobs and Employed Residents, September Quarter 2019 to September Quarter 2020

Category	Rockhampton RC	Regional QLD	Queensland	Australia
GRP	-6.4%	-2.5%	-3.1%	-4.7%
Local Jobs	-3.9%	-3.8%	-3.2%	-3.7%
Employed Residents	0.9%	-2.1%	-3.1%	-3.7%

Note: Local Jobs and Employed Residents consider the JobKeeper Scheme
Source: Economy ID (2021)

2.6.1.2 Output

Total output across all industry sectors of employment in the Rockhampton Region in the September Quarter 2020 declined by \$151 million compared to September Quarter 2019. Output was significantly impacted in the following industry sectors:

- Accommodation and Food Services: output in this industry sector decreased by 38.5% in September Quarter 2020;
- Construction: output in this industry sector decreased by 31.9% in September Quarter 2020; and
- Arts and Recreation Services: outputs in this industry sector decreased by 25.5% in September Quarter 2020.

However, not all industries experienced a decline in output as a result of COVID-19, with the following sectors experiencing an increase:

- Health Care and Social Assistance: output in this industry sector increased by 12.2% in September Quarter 2020;
- Agriculture, Forestry and Fishing: output in this industry sector increased by 10.5% in September Quarter 2020; and
- Public Administration and Safety: outputs in this industry sector increased by 9.9% in September Quarter 2020.

Table 2-13 below shows the change in output by industry in Rockhampton Regional Council due to the impact of COVID-19.

Table 2-7 Impact of COVID-19 on Output by Industry Sector, Rockhampton Region, September Quarter 2019 to September Quarter 2020

Industry sector	Rockhampton Regional Council	
	No. (\$m)	%
Agriculture, Forestry and Fishing	5	10.5%
Mining	-5	-4.0%
Manufacturing	-17	-7.3%
Electricity, Gas, Water and Waste Services	-14	-3.3%
Construction	-75	-31.9%
Wholesale Trade	-3	-4.1%
Retail Trade	-1	-1.4%
Accommodation and Food Services	-24	-38.5%
Transport, Postal and Warehousing	-57	-25.4%
Information Media and Telecommunications	1	4.2%
Financial and Insurance Services	-3	-3.3%
Rental, Hiring and Real Estate Services	2	1.1%
Professional, Scientific and Technical Services	1	1.5%
Administrative and Support Services	0	0.0%
Public Administration and Safety	11	9.9%
Education and Training	12	9.9%
Health Care and Social Assistance	23	12.2%
Arts and Recreation Services	-3	-25.5%
Other Services	-3	-4.6%
Total	-151	-

Source: Economy ID (2021)

2.6.1.3 Value Added

Total value added across all industry sectors of employment in the Rockhampton Region in the September Quarter 2020 declined by \$74 million compared to September Quarter 2019. Value Added was significantly impacted in the following industry sectors:

- Construction: value added in this industry sector decreased by 39.9% in September Quarter 2020;
- Accommodation and Food Services: value added in this industry sector decreased by 35.6% in September Quarter 2020; and
- Transport, Postal and Warehousing: value added in this industry sector decreased by 28.4% in September Quarter 2020.

However, like the trend observed in the preceding section, not all industries experienced a decline in value added as a result of COVID-19, with the following sectors experiencing an increase:

- Health Care and Social Assistance: value added in this industry sector increased by 10.0% in September Quarter 2020;
- Agriculture, Forestry and Fishing: value added in this industry sector increased by 8.4% in September Quarter 2020; and

- Public Administration and Safety: value added in this industry sector increased by 7.8% in September Quarter 2020.

Table 2-14 below shows the change in value added by industry in Rockhampton Regional Council due to the impact of COVID-19.

Table 2-8 Impact of COVID-19 on Value Added by Industry Sector, Rockhampton Region, September Quarter 2019 to September Quarter 2020

Industry sector	Rockhampton Regional Council	
	No. (\$m)	%
Agriculture, Forestry and Fishing	2	8.4%
Mining	-5	-5.9%
Manufacturing	-7	-9.3%
Electricity, Gas, Water and Waste Services	-8	-5.2%
Construction	-26	-35.6%
Wholesale Trade	-3	-6.3%
Retail Trade	-2	-3.4%
Accommodation and Food Services	-12	-39.9%
Transport, Postal and Warehousing	-29	-28.4%
Information Media and Telecommunications	0	1.4%
Financial and Insurance Services	-3	-5.6%
Rental, Hiring and Real Estate Services	0	-1.1%
Professional, Scientific and Technical Services	0	-0.7%
Administrative and Support Services	-1	-1.7%
Public Administration and Safety	6	7.8%
Education and Training	6	7.8%
Health Care and Social Assistance	13	10.0%
Arts and Recreation Services	-1	-24.7%
Other Services	-2	-7.3%
Total	-74	-

Source: Economy ID (2021)

2.6.1.4 Local Jobs

Economy.ID data indicated that employment in the Rockhampton Region in the September Quarter 2020 declined by 1,581 workers compared to September Quarter 2019. The degree of impact COVID-19 has had on local jobs by industry sectors has varied, with the following industry sectors impacted most significantly:

- Accommodation and Food Services: employment in this industry sector decreased by 878 workers in the September Quarter 2020;
- Construction: employment in this industry sector decreased by 606 workers in the September Quarter 2020; and
- Transport, Postal and Warehousing: employment in this industry sector decreased by 476 workers in the September Quarter 2020.

As highlighted in the previous sections, not all industries experienced a decline in because of COVID-19, with the following sectors experiencing an increase in the number of local jobs:

- Health Care and Social Assistance: employment in this industry sector increased by 509 workers in September Quarter 2020;
- Education and Training: employment in this industry sector increased by 325 workers in September Quarter 2020; and
- Public Administration and Safety: employment in this industry sector increased by 237 workers in September Quarter 2020.

Table 2-15 below shows the change in local jobs by industry in Rockhampton Regional Council due to the impact of COVID-19.

Table 2-9 Impact of COVID-19 on Local Jobs by Industry Sector, Rockhampton Region, September Quarter 2019 to September Quarter 2020

Industry sector	No.	% of Total
Agriculture, Forestry and Fishing	67	-4.2%
Mining	-51	3.2%
Manufacturing	-155	9.8%
Electricity, Gas, Water and Waste Services	-66	4.2%
Construction	-606	38.3%
Wholesale Trade	-39	2.5%
Retail Trade	-152	9.6%
Accommodation and Food Services	-878	55.5%
Transport, Postal and Warehousing	-476	30.1%
Information Media and Telecommunications	-9	0.5%
Financial and Insurance Services	-18	1.1%
Rental, Hiring and Real Estate Services	-7	0.5%
Professional, Scientific and Technical Services	-6	0.4%
Administrative and Support Services	-29	1.8%
Public Administration and Safety	237	-15.0%
Education and Training	325	-20.6%
Health Care and Social Assistance	509	-32.2%
Arts and Recreation Services	-91	5.8%
Other Services	-138	8.7%
Total	-1,581	100.0%

Source: Economy ID (2021)

2.6.1.5 Employed Residents

Economy.ID data indicated that the number of Rockhampton Region residents employed in the September Quarter 2020 increased by 326 workers compared to September Quarter 2019. However, the number of employed residents was significantly impacted in the following industry sectors:

- Accommodation and Food Services: employment in this industry sector decreased by 731 workers in the September Quarter 2020;

- Construction: employment in this industry sector decreased by 453 workers in the September Quarter 2020; and
- Transport, Postal and Warehousing: employment in this industry sector decreased by 285 workers in the September Quarter 2020.

Whereas, the following sectors experienced an increase in the number of employed residents:

- Health Care and Social Assistance: employment in this industry sector increased by 768 workers in September Quarter 2020;
- Education and Training: employment in this industry sector increased by 488 workers in September Quarter 2020; and
- Public Administration and Safety: employment in this industry sector increased by 376 workers in September Quarter 2020.

Table 2-16 below shows the change in employed residents by industry in Rockhampton Regional Council due to the impact of COVID-19.

Table 2-10 Impact of COVID-19 on Employed Residents by Industry Sector, Rockhampton Region, September Quarter 2019 to September Quarter 2020

Industry sector	No.	% of Total
Agriculture, Forestry and Fishing	92	28.3%
Mining	-36	-11.0%
Manufacturing	-35	-10.8%
Electricity, Gas, Water and Waste Services	4	1.4%
Construction	-453	-139.2%
Wholesale Trade	38	11.6%
Retail Trade	79	24.2%
Accommodation and Food Services	-731	-224.4%
Transport, Postal and Warehousing	-285	-87.4%
Information Media and Telecommunications	8	2.4%
Financial and Insurance Services	12	3.8%
Rental, Hiring and Real Estate Services	22	6.6%
Professional, Scientific and Technical Services	58	17.8%
Administrative and Support Services	22	6.8%
Public Administration and Safety	376	115.4%
Education and Training	488	149.7%
Health Care and Social Assistance	768	235.9%
Arts and Recreation Services	-70	-21.6%
Other Services	-31	-9.6%
Total	326	100.0%

Source: Economy ID (2021)

2.7 Key Demographic and Labour Force Findings

Historically, the population of Rockhampton Regional Council has grown at a slower rate than the broader Central Queensland SA4. Between 2020 and 2041, population growth is anticipated to be predominantly within the following catchments:

- Livingstone Coastal Communities Catchments (within Livingstone LGA), an increase of 15,904 persons or a growth rate of 2.3% over the projection horizon;
- Gracemere (within Rockhampton LGA), an increase of 9,808 persons or growth rate of 2.7% over the projection horizon; and
- Rockhampton North (within Rockhampton LGA), an increase of 9,525 persons or a growth rate of 0.9% over the projection horizon.

Collectively, the population of catchments within Rockhampton Regional Council is anticipated to increase from 81,999 persons in 2020 to 101,959 persons in 2041 (representing growth of 19,960 persons). Additionally, the number of dwellings are anticipated to increase by 8,187 over this time period.

Based on the population and dwelling projections outlined in this Section, there could be a need for additional retail and/or commercial floor space to service the current and future needs of residents within the defined catchment areas (e.g. a supermarket). In addition to the population growth being a driver of retail and commercial floorspace demand, the current and projected workforce (i.e. number of white collar workers) of each catchment would contribute to projected demand for commercial office floor space.

Similarly to population growth, the employed workforce of Rockhampton Regional Council has grown at a slower rate than the broader Central Queensland SA4. However, this assessment found that there was a large degree of self-containment amongst the 10 identified catchments.

As of 2016, the three most common occupations of workers in each catchment found the following trends in occupations:

- **Mostly white collar:** Rockhampton North, Rockhampton South, Mount Morgan, Glenlee – Rockyview and Livingstone Coastal Communities; and
- **Mostly blue collar:** Gracemere, Bouldercombe, Rockhampton Region - West, Rockhampton Region - East and Livingstone Shire Balance.

The catchments in which white collar employment dominates have a higher demand for commercial office floor space per employed person than the catchments which are mostly blue collar, with this employment generally accommodated either within industrial floor space or in a mobile setting.

The Rockhampton South catchment contains a significant proportion of commercial centres floor space within the LGA with the CBD intended to be the focal point for the provision of commercial office space within the region. The majority of the workforce in this catchment are typically white collar workers, who typically hold some form of further education. As such, Rockhampton Regional Council should encourage any future education and training facilities over and above existing provision to locate within the Rockhampton South catchment (i.e. the Rockhampton CBD) as opposed to other centre zones within the network (e.g. the Rockhampton North catchment, which also has a high proportion of white collar workers).

The industries recording significant growth in an area can provide insight into the variety of commercial, industrial and public spaces in an LGA. Rockhampton Regional Council has achieved significant growth in the following sectors:

- Health Care and Social Assistance (a proportion accommodated in commercial centres);
- Agriculture, Forestry and Fishing (accommodated outside of commercial centres);
- Public Administration and Safety (accommodated in commercial centres); and
- Education and Training (a proportion accommodated in commercial centres).

With respect to future planning in Rockhampton Regional Council, it is important to consider employment growth at a sectoral level and how it influences the provision of retail and commercial floor space. For instance, health care and social assistance operations traditionally co-locate. Thus, as these uses continue to establish in Rockhampton, the opportunity to facilitate co-locations of this nature within centres zones may arise. Stakeholder consultation identified that the health care sector represented a tenant category targeted for centre vacancies, recognising that employment within this sector is likely to further increase over time.

NOT COUNCIL POLICY

Section 3 Property Market Overview

The purpose of this section of the report is to undertake an analysis of the sales performance of commercial office/retail (referred as commercial property sales and excludes industrial property sales) and attached dwelling market within the Rockhampton Region. This section will also provide an analysis of the current leasing market for commercial/retail property. For the purposes of this analysis, commercial market has been defined to exclude industrial properties.

Commercial property sales within Rockhampton Region were considered, with sales over the past ten years identified in the following localities

- Rockhampton City;
- Berserker;
- Allenstown;
- Wandal;
- Mount Morgan; and
- Balance (Kawana, Norman Gardens, Park Avenue, Stanwell, Gracemere, Frenchville, Koongal, The Range, Depot Hill, Parkhurst, Bajool).

Whereas, for attached dwelling sales over the past ten years, sales have been identified in following localities:

- Rockhampton City;
- Berserker;
- Norman Gardens;
- Allenstown;
- Frenchville;
- Kawana;
- Gracemere; and
- Balance (The Range, Koongal, West Rockhampton, Lakes Creek, Wandal, Depot, Park Avenue, Parkhurst, Mount Morgan).

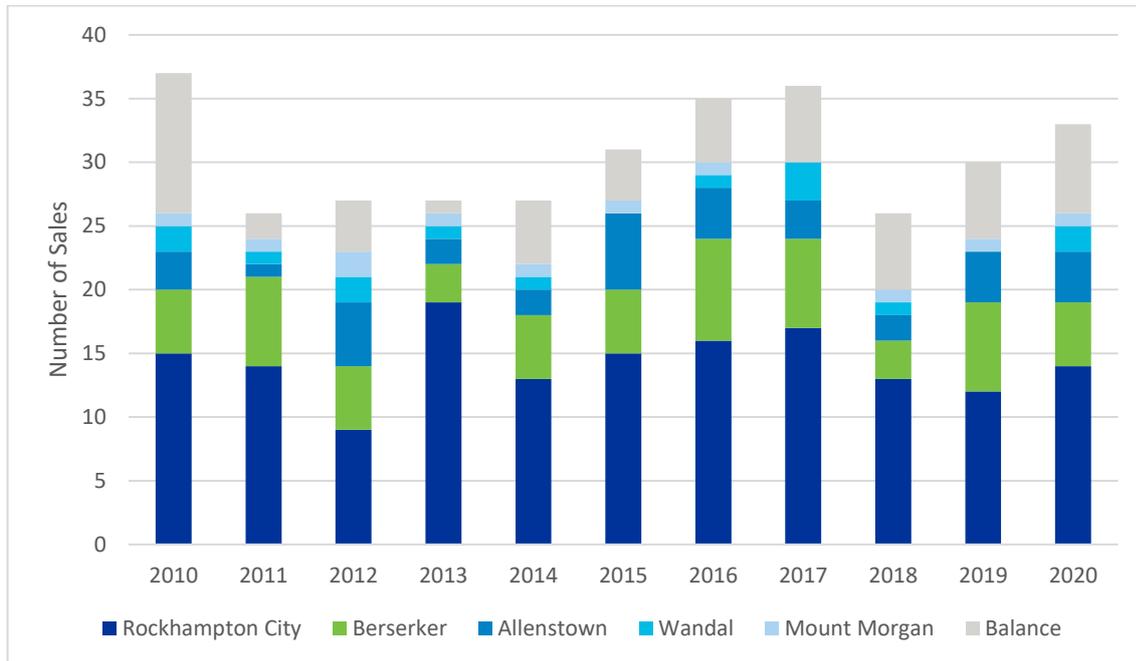
3.1 Commercial Property Sales

The Rockhampton Region recorded strong commercial property sales over the past ten years, with an average of 31 sales per annum. Sales activity peaked in 2010 with 37 sales before declining to a low of 26 sales in 2018. Sales have recovered since 2018 but have remained significantly below the ten-year average. The relatively low sales volume across the Region over the last ten years is indicative of a commercial market with limited properties for sale in a given year, with tenancies often held for the long term by relatively few landholders. In terms of localities, sales were largely concentrated in the suburbs of Rockhampton City and Berserker, with an average of 14 and five sales, respectively.

Figure 3-1 below summarises the volume of commercial property sales within the localities of the Rockhampton Region between 2010 and 2020.

3.1.1 Volume of Sales

Figure 3-1 Sales Volume, Commercial Property Market, Rockhampton Region, 2010 to 2020



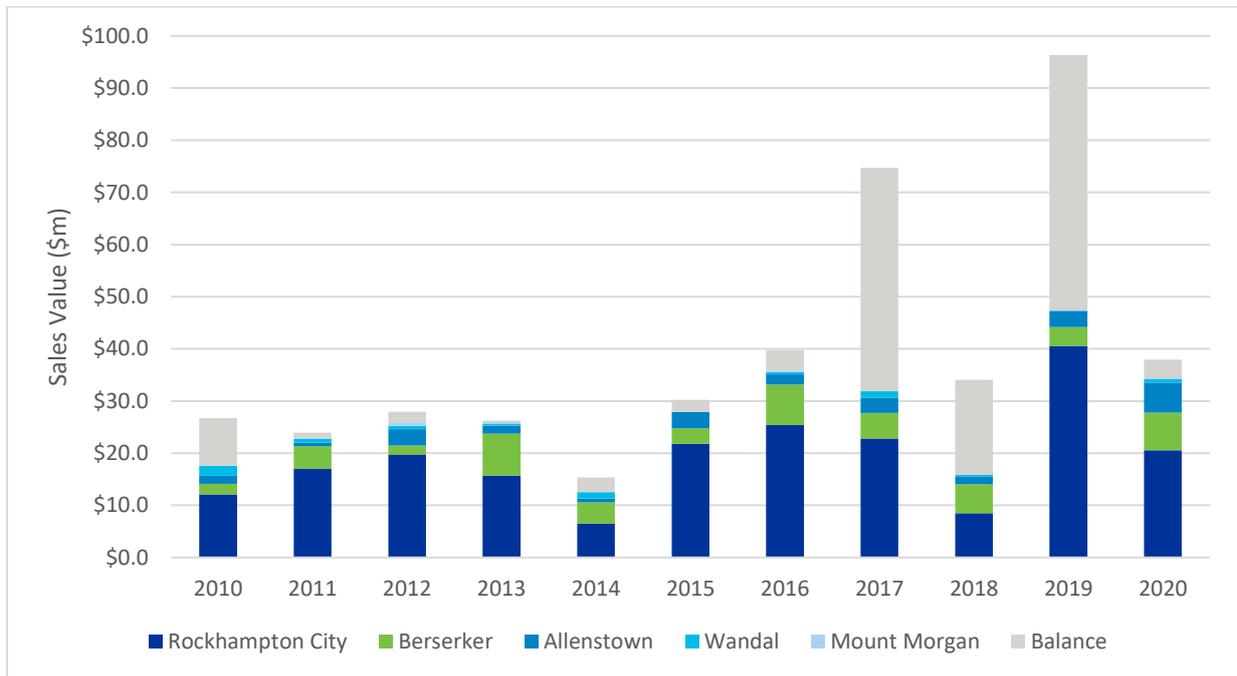
Source: Pricfinder database, February 2021

3.1.2 Value of Sales

Over the past ten years, the average value of commercial property sales within the Rockhampton Region was \$39.4 million per annum, with most sales value concentrated within the suburbs of Rockhampton City and Berserker. In the last ten years, the total value of sales was highest in 2019 at \$96.3 million across Region. The value of sales within Rockhampton City also peaked in 2019 at \$40.6 million.

Figure 3-2 below summarises the value of commercial property sales within the localities of the Rockhampton Region between 2010 and 2020.

Figure 3-2 Sales Value (\$m), Commercial Property Market, Rockhampton Region, 2010 to 2020



Source: Pricefinder database, February 2021

3.1.3 Median Sale Price

Over the last ten years, the median sales price for commercial property within Rockhampton Region was recorded at \$535,000, with the median sale price significantly higher in Rockhampton City and Allenstown. The median sale price across the Region peaked in 2017 at \$750,000 before declining. Across the localities analysed, the median sale price over the last ten years was as follows:

- Rockhampton City: median sale price of \$540,100;
- Berserker: median sale price of \$530,000;
- Allenstown: median sale price of \$599,000;
- Wandal: median sale price of \$364,250;
- Mount Morgan: median sale price of \$185,000; and
- Balance: median sale price of \$570,000.

Interestingly, the median sale price for the Balance area in 2019 was skewed by the sale of the Masters Hardware Centre (5.5ha) in 2019 for \$43.5 million. Additionally, 2019 median sale price for Rockhampton City was skewed by sale of City Centre Plaza (2.1ha) for \$23.5 million. Within Allenstown, 2020 median sale price skewed by sale of Sundowner Motor Inn (2.1ha) for \$23.5 million

Table 3-1 below summarises the median sales price for commercial property within the Rockhampton Region over the last ten years.

Table 3-1 Median Sales Price, Commercial Property, Rockhampton Region, 2010 to 2020

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2010	\$350,000	\$456,500	\$620,000	\$932,500	\$135,000	\$430,000	\$430,000
2011	\$662,500	\$425,000	\$660,000	\$720,000	\$265,000	\$440,000	\$587,500
2012	\$840,000	\$352,000	\$608,000	\$357,500	\$332,500	\$375,400	\$450,000
2013	\$405,000	\$270,000	\$755,000	\$282,700	\$450,000	\$230,000	\$405,000
2014	\$434,500	\$770,000	\$378,750	\$1,200,000	\$104,500	\$595,000	\$477,500
2015	\$770,000	\$275,000	\$457,500	-	\$160,000	\$510,000	\$550,000
2016	\$660,000	\$843,500	\$377,000	\$387,500	\$330,000	\$935,000	\$700,000
2017	\$770,000	\$803,000	\$806,000	\$341,000	-	\$867,500	\$750,000
2018	\$550,000	\$406,000	\$721,850	\$310,000	\$18,000	\$2,200,000	\$545,050
2019	\$1,137,500	\$510,000	\$588,750	-	\$200,000	\$1,035,000	\$655,000
2020	\$433,750	\$550,000	\$1,410,000	\$340,000	\$150,000	\$510,000	\$460,199
Median (2010-2020)	\$540,100	\$530,000	\$599,000	\$364,250	\$185,000	\$570,000	\$535,000

Source: Pricfinder database, February 2021

3.1.4 Median Sale Price Per Square Metre

Between 2010 and 2020, the median sales price for commercial property within the Rockhampton Region was \$676 per square metre, within the identified localities it was as follows:

- Rockhampton City: \$1,111 per square metre;
- Berserker: \$704 per square metre;
- Allenstown: \$759 per square metre;
- Wandal: \$554 per square metre;
- Mount Morgan: \$237 per square metre; and
- Balance: \$548 per square metre.

Table 3-2 below summarises the median sales price per square metre for commercial property within the Rockhampton Region over the last ten years.

Table 3-2 Median Sales Price (\$/sqm), Commercial Property, Rockhampton Region, 2010 to 2020

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2010	\$961	\$753	\$647	\$635	\$389	\$424	\$655
2011	\$1,373	\$661	\$652	\$689	\$264	\$361	\$822
2012	\$1,180	\$741	\$687	\$1,238	\$301	\$557	\$741
2013	\$1,102	\$722	\$615	\$1,297	\$895	\$732	\$922
2014	\$1,067	\$705	\$768	\$1,148	\$207	\$336	\$737
2015	\$1,497	\$583	\$646	-	\$317	\$484	\$754
2016	\$1,427	\$770	\$556	\$407	\$109	\$715	\$794
2017	\$914	\$704	\$759	\$408	-	\$476	\$719

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2018	\$842	\$1,449	\$1,268	\$493	\$118	\$384	\$790
2019	\$2,224	\$562	\$613	-	\$99	\$688	\$819
2020	\$1,635	\$692	\$1,114	\$478	\$61	\$571	\$893
Median (2010-2020)	\$1,111	\$704	\$757	\$554	\$237	\$531	\$768

Note: The median sale price for the Balance area was skewed as only two sales were recorded.

Source: Pricfinder database, February 2021

3.1.5 Floor Plate Sizes

In Rockhampton Region, the median floor plate¹ in 2010 was 607sqm. In 2020, the median floor plate size sold in Rockhampton Region has increased to 951sqm. Throughout a ten-year period (between 2010 and 2020), the median floor plate size in Rockhampton Region was 830sqm. At a sub-regional level, median floor plates were as follows:

- Rockhampton City had a median floor plate size of 531 sqm in 2010, which has increased to 569 sqm in 2020;
- Berserker had a median floor plate size of 446 sqm in 2010, which has increased to 2,244 sqm in 2020;
- Allenstown had a median floor plate size of 647 sqm in 2010, which has increased to 1,202 sqm in 2020;
- Wandal had a median floor plate size of 1,503 sqm in 2010, which has decreased to 737 sqm in 2020;
- Mount Morgan had a median floor plate size of 347 sqm in 2010, which has increased to 2,441 sqm in 2020;
- Balance of Rockhampton Region recorded a median floor plate size of 1,011sqm in 2010, which has increased to 1,200 sqm in 2020.

Median floor plate sizes over the past ten years were highest in the Balance of Rockhampton Region (1,200 sqm), followed by Allenstown (941 sqm), Berserker (878 sqm), Wandal (880 sqm) and Berserker (848 sqm). The trends outlined in Table 3-3 below suggests a correlation exists, i.e. median floor plate size are typically higher in the balance region.

Table 3-3 Median Floor Plate Size (sqm), Commercial Property, Rockhampton Region, 2010 to 2020

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2010	531	446	647	1,503	347	1,011	607
2011	582	908	1,012	1,045	1,002	1,720	972
2012	766	506	910	371	1,265	647	607
2013	427	556	1,376	218	503	314	503
2014	506	1,419	485	1,045	504	1,126	541
2015	809	767	890	-	505	1,106	809
2016	839	1,150	996	951	3,024	1,608	1,012
2017	842	878	582	1,030	-	1,699	1,068
2018	828	911	744	629	152	3,192	980
2019	683	810	1,165	-	2,024	1,379	868

¹ Floor Plate Size is the amount of leasable footage on an individual floor of a commercial building.

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2020	569	2,244	1,202	737	2,441	1,200	951
Median (2010-20)	644	848	941	880	506	1,200	830

Source: Pricfinder database, February 2021

In terms of range (and completeness), minimum and maximum floor plate sizes were also assessed. As expected, commercial floor plate sizes were smallest in Rockhampton City at 76 sqm between 2010 and 2020 (most likely attributable to higher costs per sqm, as per Table 3-2). Meanwhile, Wandal recorded the highest minimum floor plate size at 218 sqm between 2010 and 2020. Table 3-4 details the commercial minimum floor plate sizes between 2010 and 2020.

Table 3-4 Minimum Floor Plate Size (sqm), Commercial Property, Rockhampton Region, 2010 to 2020

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2010	132	99	309	412	347	334	99
2011	96	288	1,012	1,045	1,002	1,012	96
2012	212	293	582	218	506	465	212
2013	96	374	1,040	218	503	314	96
2014	76	417	429	1,045	504	1,012	76
2015	97	301	192	-	505	584	97
2016	150	417	405	951	3,024	334	150
2017	76	139	507	809	-	405	76
2018	152	276	177	629	152	947	152
2019	140	460	542	-	2,024	728	140
2020	120	506	594	523	2,441	212	120
Minimum (2010-20)	76	99	177	218	152	212	76

Source: Pricfinder database, February 2021

Despite higher costs per sqm, commercial floor plate sizes were largest (bar the Balance of Rockhampton Region) in Rockhampton City at 21,380sqm (this represents the sale of City Centre Plaza as a whole) between 2010 and 2020 (attributable this region being the central business district). Meanwhile, Mount Morgan recorded the lowest maximum floor plate size sale at 3,024 sqm between 2010 and 2020. Table 3-5 details the commercial maximum floor plate sizes between 2010 and 2020.

Table 3-5 Maximum Floor Plate Size (sqm), Commercial Property, Rockhampton Region, 2010 to 2020

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2010	1,524	606	1,712	2,593	347	7,465	7,465
2011	2,024	1,803	1,012	1,045	1,002	2,428	2,428
2012	1,548	1,090	1,113	524	2,024	1,032	2,024
2013	4,340	4,059	1,712	218	503	314	4,340
2014	4,421	3,410	541	1,045	504	3,688	4,421

Year	Rockhampton City	Berserker	Allenstown	Wandal	Mount Morgan	Balance	Rockhampton Region
2015	2,099	2,514	1,094	-	505	2,785	2,785
2016	4,340	1,906	1,310	951	3,024	4,553	4,553
2017	4,048	1,903	2,429	6,402	-	55,230	55,230
2018	2,023	1,733	1,311	629	152	26,630	26,630
2019	21,380	1,778	4,824	-	2,024	55,230	55,230
2020	2,024	3,603	1,842	951	2,441	2,438	3,603
Maximum (2010-20)	21,380	4,059	4,824	6,402	3,024	55,230	55,230

Source: Pricer database, February 2021

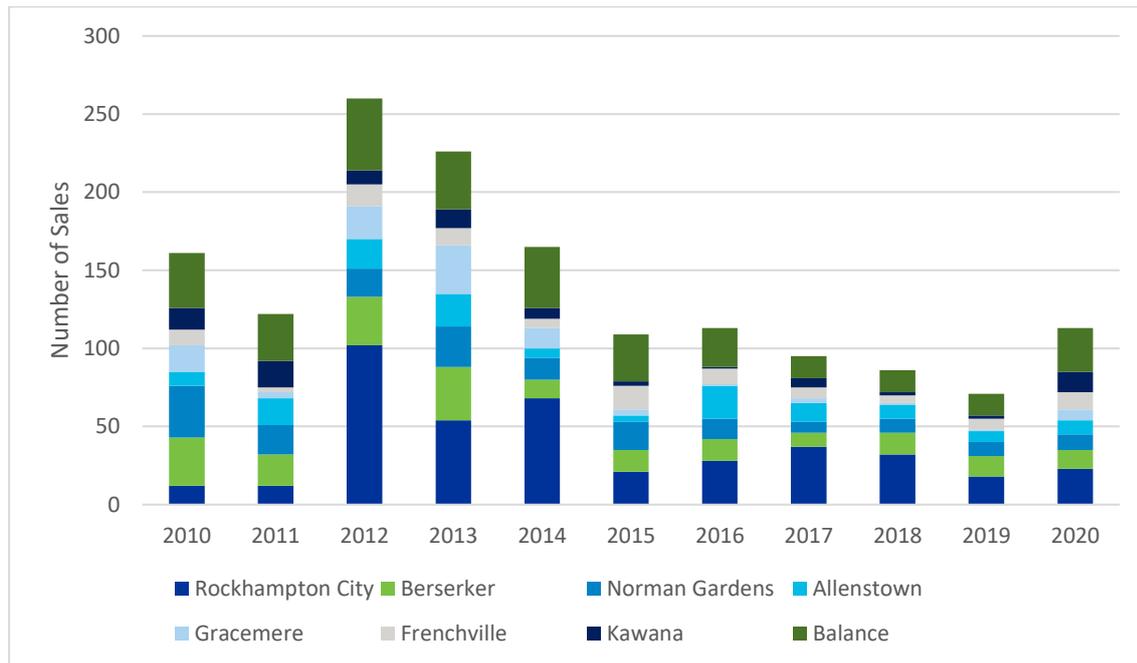
3.2 Attached Dwelling (Duplexes, Units and Townhouses) Sales

3.2.1 Volume of Sales

In the 2010 to 2020 period, there were an average of 138 attached dwelling sales per annum in the Rockhampton Region. Sales were largely concentrated in the suburbs of Rockhampton City, Berserker and Norman Gardens, with an average of 47, 19 and 16 sales per annum. Across the Region, the volume of attached dwelling sales peaked in 2012 with 260 sales. Since 2012, the sales volume has declined significantly to a low of 71 in 2019. In the most recent year, there were 2013 sales showing signs of a recovery.

Figure 3-3 below summarises the volume of attached dwelling sales within the localities of the Rockhampton Region between 2010 and 2020.

Figure 3-3 Volume of Sales, Attached Dwellings, Rockhampton Region, 2010 to 2020



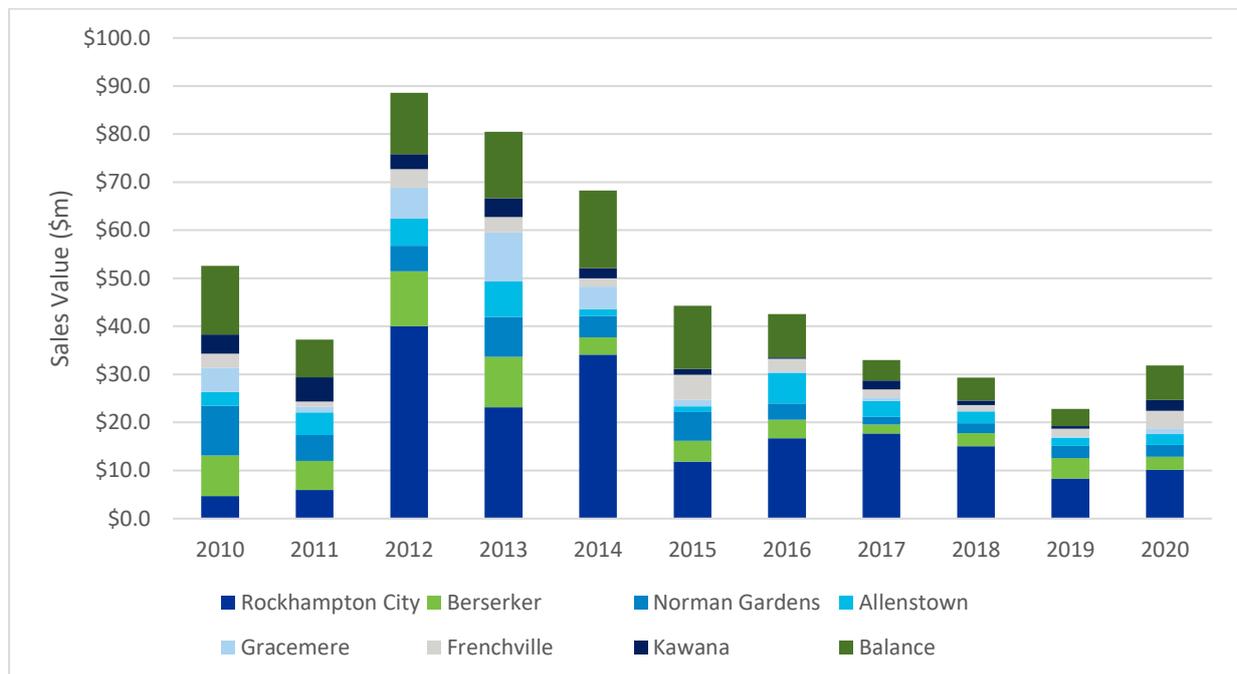
Source: Pricfinder database, February 2021

3.2.2 Value of Sales

Between 2010 and 2020, the average value of attached dwelling sales within the Rockhampton Region was \$48.3 million per annum. The value of sales was highest in the suburbs of Rockhampton City, Berserker and Norman Gardens. Across the Rockhampton Region, the total value of sales was highest in 2012 at \$88.6 million across the Region. The high value of sales in this year can be explained by the sale of new apartments in the Empire Hotel Apartments. The value of sales within Rockhampton City and Berserker also peaked in 2012 at \$40.0 million and \$11.4 million, respectively. In the most recent year, total value of attached dwelling sales across the Region was recorded at \$31.8 million, higher than the two previous years.

Figure 3-4 below summarises the value of attached dwelling property sales within the localities of the Rockhampton Region between 2010 and 2020.

Figure 3-4 Value of Sales (\$m), Attached Dwelling Market, Rockhampton Region, 2010 to 2020



Source: Pricer database, February 2021

3.2.3 Median Sale Price

Over the last ten years, the median sales price for attached dwellings within Rockhampton Region was recorded at \$315,000. In terms of localities, only the suburb Rockhampton City achieved a higher median sale price. The median sale price across the Region peaked in 2014 at \$369,500 before declining. The median sale price over the last ten years within the localities was as follows:

- Rockhampton City: median sale price of \$436,000;
- Berserker: median sale price of \$285,000;
- Norman Gardens: median sale price of \$290,000;
- Allenstown: median sale price of \$280,000;
- Gracemere: median sale price of \$309,500;
- Gracemere: median sale price of \$295,000;
- Kawana: median sale price of \$272,500; and
- Balance: median sale price of \$300,000.

The median sale of attached dwellings was significantly higher in Rockhampton City primarily because of the desirable location, with the suburb encompassing the Rockhampton Central Business District and several employment hubs. The attached dwelling within this suburb were typically in the form of apartments.

Table 3-6 below summarises the median sales price for attached within the Rockhampton Region over the last ten years.

Table 3-6 Median Sales Price, Attached Dwellings, Rockhampton Region, 2010 to 2020

Year	Rockhampton City	Berserker	Norman Gardens	Allenstown	Gracemere	Frenchville	Kawana	Balance	Rockhampton Region
2010	\$372,000	\$260,000	\$290,000	\$290,000	\$299,500	\$303,500	\$257,500	\$315,000	\$290,000
2011	\$417,500	\$290,000	\$281,000	\$268,000	\$292,500	\$335,000	\$278,500	\$254,250	\$285,000
2012	\$325,000	\$290,000	\$276,000	\$320,000	\$295,000	\$269,200	\$335,000	\$263,000	\$319,000
2013	\$442,231	\$309,000	\$315,750	\$396,000	\$356,500	\$280,000	\$321,500	\$320,000	\$340,500
2014	\$439,731	\$305,000	\$325,000	\$208,750	\$369,500	\$297,500	\$285,000	\$355,000	\$369,500
2015	\$439,462	\$323,500	\$347,500	\$290,000	\$358,500	\$355,000	\$270,000	\$303,750	\$348,500
2016	\$502,261	\$299,500	\$280,000	\$319,000	\$227,000	\$267,250	\$223,000	\$295,000	\$319,000
2017	\$432,754	\$210,000	\$240,000	\$310,000	\$200,000	\$217,500	\$247,500	\$335,000	\$307,000
2018	\$465,000	\$172,375	\$195,000	\$237,500	\$55,000	\$299,000	\$475,000	\$300,000	\$295,000
2019	\$492,500	\$200,000	\$297,000	\$225,000	\$330,000	\$185,000	\$258,750	\$294,500	\$297,000
2020	\$384,000	\$206,500	\$220,000	\$232,500	\$170,000	\$375,000	\$160,000	\$247,000	\$240,000
Median (2010-2020)	\$436,000	\$285,000	\$290,000	\$280,000	\$309,500	\$295,000	\$272,500	\$300,000	\$315,000

Note: The median sale price for the Balance area was skewed as only two sales were recorded.

Source: Pricer database, February 2021

3.2.4 Distribution of Attached Dwellings Sales

Entries from the Pricer database indicates that attached dwellings sales between 2010 and 2020 were largely concentrated within three (3) streets, with these being:

- Victoria Parade;
- East Street; and
- Bolsover Street.

Within Rockhampton City, there are eight (8) different buildings of note for attached dwellings in Victoria Parade, with these being: Arkuna Court, Fitzroy Waterfront Apartments, Gallery Apartments, Quest Apartments, Skyview, Southbank on Victoria, The Edge Apartments and The Rocks on Victoria. Approximately 222 sales occurred for attached dwellings on Victoria Parade between 2010 and 2020. East Street in Rockhampton City recorded approximately 160 sales in attached dwellings between 2010 and 2020, with these sales being distributed amongst two buildings, with these being Empire Apartments and The Empire. The other street of note for attached dwelling sales between 2010 and 2020 in Rockhampton City is Bolsover Street, recording approximately 27 sales during this timeframe, with a notable building along this street being City Ville Luxury Apartments.

3.3 Retail & Commercial Property Leasing Market

There were 131 commercial and retail listings identified within the Rockhampton Region, with the majority of listings located in the suburbs of Rockhampton City and Berserker. As mentioned, Rockhampton City recorded the highest number of retail and commercial vacancies (76 listings) as of February 2021. From this total, the majority of vacancies were on East Street (25 listings), followed by Denham Street (11 listings) and Bolsover Street (9 listings).

Relevantly, the median tenancy size of the listings across the broader Region was in the order of 183sqm. The largest listing was in Norman Gardens for a large format retail space. Meanwhile, median asking rent on a per square metre basis for commercial and retail property within the Rockhampton Region varied significantly, ranging from \$167/sqm in Rockhampton City to \$550/sqm in Parkhurst. Across the broader Region, the median asking rent was \$200/sqm.

Section 4 of this report undertakes a comprehensive analysis of vacant commercial and retail tenancies across Rockhampton Region.

Table 3-7 summarises the retail and commercial properties available for rent within the Rockhampton Region by suburb as of February 2021.

Table 3-7 Retail and Commercial Properties for Lease, February 2021

Suburb	Number of listings	Listing Size Range (Sqm)	Median Tenancy Size (Sqm)	Median Asking Rent Per Sqm (Yearly)
Rockhampton City	76	10-1,200	216	\$167
Berserker	30	40-759	137	\$206
Allenstown	6	82-460	115	\$234
Park Avenue	3	100-353	277	\$200
Norman Gardens	4	325-7,660	325	\$250
Kawana	7	130-293	196	\$221
Frenchville	2	79-150	115	\$200
Parkhurst	3	78-262	170	\$550
Rockhampton Region	131	10-7,660	183	\$200

Note: Median Asking Rent excludes GST and Outgoings. Not all listings had floor space size and asking rent.

Source: REA Group Ltd (2021)

Section 4 Centres Supply Assessment

4.1 Centres Hierarchy

The Rockhampton Planning Scheme 2015 has a well developed centres hierarchy with clear statements of purpose, scale and limitations for each identified level of centre and a consistent expression of policy across the strategic framework, zones and assessment tables. Six centres types are identified by the planning scheme which are described in the table below.

Overall, centres are envisaged as provide a mix of land uses, including residential development (generally above ground). Notably, larger scale offices are directed to the principal centre (Rockhampton's CBD) and larger scale retail (such as department and discount department stores) are directed to the principal or major centres, while full line supermarkets are directed to district centres and above. Provision is also made for full line supermarkets on a particular site in the Gladstone Road specialised centre where reusing existing large scale buildings.

There is a strong policy intention that centres are also to be consolidated within zoned areas, with clear policy statements at each level of the planning scheme requiring that expansion does not occur into adjoining areas. However, the scheme anticipates new neighbourhood and local centres in greenfield areas of Gracemere and North Parkhurst.

Emphasis is also placed on the quality of built form, streetscapes and the public realm in centres, with particular attention to the creation of active frontages with built to boundary shopfronts and awnings in key locations.

Assessment levels within the centre zones correlate closely to the intent of each centre or precinct and, overall, is relatively permissive. It provides wide scope for changes of use for a range of community and commercial purposes within existing buildings. These changes are generally accepted subject to requirements, avoiding the necessity of an application provided the relevant requirements are met. The list of applicable requirements does not appear unreasonable nor impractical.

Typically, community and commercial activities are triggered to code assessment (rather than impact assessment) where not meeting the accepted development criteria or requirements. The exceptions, where development is triggered to impact assessment (for example, for offices over 250m²), appear to fairly reflect intentions for different types of centres in the hierarchy.

In additional to the centre zones, residential and industry zones also allow for some limited commercial activities. In the residential zones, this may occur where they are small-scale and do not detract from nearby centres, do not have the effect of expanding an existing centre (i.e. they are stand-alone) and have access to higher order roads. In the low-medium residential zone, provision is also made for highway dependent uses along Albert Street and offices up to 200m² in any location. Shops and food and drink outlets are also contemplated in the high density residential zone which adjoins the CBD.

The low and medium impact industry zones contemplate service stations, small scale food and drink outlets servicing the day-to-day needs as well as uses which would be incompatible in a centres zone because of its size or nature (for example, heavy plant and machinery, wholesale trade supplies, outdoor sales, agricultural supplies store, garden centre and bulk landscape supplies) and uses that share similar characteristics and external impacts such as indoor sport and recreation facilities.

Table 4-1 Overview of Existing Centres Hierarchy, Rockhampton Regional Council

Centre type / location	Purpose / description	Key Provisions	Levels of Assessment
<p>Principal centre Rockhampton CBD</p>	<p>This is the primary business centre for the region with the highest concentration of commercial, retail, entertainment and cultural uses.</p> <p>It is to accommodate high density residential, tourist and short accommodation (except within the Denison Street precinct).</p> <p>Continuous commercial facades are maintained or created as well as shaded footpaths, street trees and other pedestrian facilities.</p> <p>It will also form the primary destination and interchange hub for all modes of road and local area public transport.</p> <p>It should be well designed, safe and highly accessible and served with all urban infrastructure. Important character and heritage values are to be retained.</p> <p>The principal centre is divided into four precincts, namely: (shown in Figure 4-1):</p> <ul style="list-style-type: none"> • The core precinct – the preferred location for office and retail; • The business services precinct – intended for large format retail, business to business services, outdoor sales etc; residential development is also accommodated; • Denison Street precinct - for large format retail, service and low impact industry and no residential uses (note the strategic framework precludes only long term while zone precludes any); and • Quay Street precinct - for retail, tourism, accommodation, food and drink outlets and entertainment optimising river frontage and heritage values. 	<p>Vacancy rates are to be kept low by avoiding unnecessary expansion of lower order centres.</p> <p>Large scale offices (over 500m²) are directed to the CBD core and possibly Quay St precincts and no other precinct.</p> <p>Large scale retail (such as department and discount department stores) is directed to the CBD (any precinct) and major centre.</p> <p>Residential development is above ground floor level or behind ground storey retail, commercial or community related activities</p> <p>The strategic framework anticipates that post 2021, the CBD may include a second full line supermarket to service the population growth that is predicted to occur in South Rockhampton.</p> <p>Building heights are stepped up to 12 storeys (as acceptable outcomes) in the core and business services precincts and lower rise (2 and 3 storeys) in Quay St and Denison St respectively.</p>	<p>A wide range of activities are accepted subject to requirements if in an existing building (no additional car parking is required under the works code). These trigger to code assessment if a new/extended building (which would likely require additional car parking).</p> <p>In the core precinct, offices, shops and showrooms are elevated only to accepted subject to requirements if involving new building.</p> <p>Both short term and long term residential uses are impact assessable (and discouraged) in the Denison Street precinct.</p> <p>Only service industry is encouraged in the business services precinct where service and low impact are facilitated in the Denison precinct.</p>

Centre type / location	Purpose / description	Key Provisions	Levels of Assessment
<p>Major centre North Rockhampton (Stockland centre)</p>	<p>Rockhampton's major centre is to accommodate retail and commercial uses at ground level providing continuous commercial facades, shaded footpaths, street trees and other pedestrian facilities;</p> <p>It should create vibrant focal points for the community and interchange hubs for modes of transport.</p> <p>It should be well designed, safe and highly accessible and served with all urban infrastructure. There are no specific precincts within the centre.</p> <p>See Figure 4-2.</p>	<p>Large scale retail (such as department and discount department stores) is directed to the major centre as well as to the CBD.</p> <p>Large scale offices are precluded.</p> <p>Residential development is accommodated above ground floor level or behind ground storey retail/commercial and any "mid or higher" rise buildings are to be mixed use (with residential at higher levels).</p> <p>Building height acceptable outcome is 4 storeys.</p>	<p>Office development over 250m² is made impact assessable.</p> <p>Otherwise a wide range of activities (including residential) are accepted subject to requirements if in an existing building (no additional car parking is required under the works code). These trigger to code assessment if a new/extended building (which would likely require additional car parking).</p> <p>Bars and hotels are code assessable even in an existing building.</p>
<p>District centres Allentown Gracemere Parkhurst</p>	<p>The district centres generally serve a catchment of 5,000-8,000 households.</p> <p>They provide a focus for weekly or fortnightly shopping trips and can include full line supermarkets.</p> <p>They should be well designed, safe and highly accessible and served with all urban infrastructure.</p> <p>See Figures 4-3 and 4-4.</p>	<p>New full line supermarkets serving the southern catchment are to be located in either Gracemere or the CBD.</p> <p>Parkhurst district centres may also include a supermarket.</p> <p>But Allentown district centre should not include another supermarket.</p> <p>Large scale offices are precluded in all.</p> <p>Residential development is accommodated above ground floor level or behind ground storey retail/commercial and any "mid" rise buildings are to be mixed use (with residential at higher levels).</p> <p>Building height acceptable outcome is 3 storeys.</p>	<p>Office development over 250m² and retail development over 3,000m² are made impact assessable.</p> <p>Otherwise a wide range of activities (including residential) are accepted subject to requirements if in an existing building (no additional car parking is required under the works code). These trigger to code assessment if a new/extended building (which would likely require additional car parking).</p> <p>Bars and hotels are code assessable even in an existing building.</p>

Centre type / location	Purpose / description	Key Provisions	Levels of Assessment
Local centres Frenchville Farm Street Norman Road Mount Morgan and New centre at Parkhurst	Local centres generally serve a catchment of 3,000-5,000 households. They are to provide a focus for convenience needs to serve the local catchment. They should be well designed, safe and highly accessible and served with all urban infrastructure.	No additional local centres (beyond those that are zoned) are required, except for a new local centre in North Parkhurst (William Palfrey Road on Lot 5 SP238731) commensurate with catchment growth. They should include only small scale convenience supermarkets (not full line supermarkets). Building height acceptable outcome is 3 storeys.	Office development over 250m ² and retail and food and drink outlets development over 1,000m ² are made impact assessable. Otherwise a wide range of activities (including residential) are accepted subject to requirements if in an existing building (no additional car parking is required under the works code). These trigger to code assessment if a new/extended building (which would likely require additional car parking). Food outlets with a drive through are made code assessable even if using an existing building.
Neighbourhood centres Berserker Kawana Park Avenue Wandal and New centre at Gracemere South	Neighbourhood centres generally serve a catchment of around 1,500 households. They provide for day to day convenience needs, including small scale shops and personal services They should be well designed, safe and highly accessible and served with all urban infrastructure.	No additional local centres (beyond those that are zoned) are required, except for a new centre in the southern growth area of Gracemere. They should include only small scale convenience supermarkets (not full line supermarkets). Building height acceptable outcome is 3 storeys.	Office development over 200m ² and retail and food and drink outlets development over 500m ² are made impact assessable. Otherwise a wide range of activities (including residential) are accepted subject to requirements if in an existing building (no additional car parking is required under the works code). These trigger to code assessment if a new/extended building (which would likely require additional car parking). Food outlets with a drive through are made code assessable even if using an existing building.

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Centre type / location	Purpose / description	Key Provisions	Levels of Assessment
<p>Specialised centres at Gladstone Road & George Street Musgrave Street Yaamba Road</p>	<p>The specialised centres accommodate showrooms, outdoor sales, food and drink outlets that are highway focussed or small-scale and serving visitors and convenience shopping.</p> <p>Some sub-precincts are intended to transition to/accommodate increasing residential development.</p> <ul style="list-style-type: none"> Gladstone Road & George Street - outdoor sales and services sub-precinct and residential and food services sub-precinct, respectively – Gladstone Road sub-precinct includes specific nominated site for larger scale retail (Aldi and former Fantastic Furniture site) Musgrave Street (mixed use sub-precinct and outdoor sales and services sub-precinct) – large scale offices are intended to relocate. Yaamba Road – does not contain sub-precincts <p>See Figures 4-1, 4-4 and 4-5.</p>	<p>Specialised centres do not accommodate large-scale offices, department stores, discount department stores or large-scale shopping centres, apart from nominated site in Gladstone Road sub-precinct.</p> <p>Further expansion of these centres into adjacent residential zones and outside the designated centre areas (including ribbon development along roads) is not to occur.</p>	<p>Office development over 200m² and retail and food and drink outlets development over 500m² are made impact assessable (except in George Street residential and food services sub-precinct where the trigger is 300m²).</p> <p>A number of other uses are including residential) are accepted subject to requirements if in an existing building. These trigger to code assessment if a new/extended building</p>

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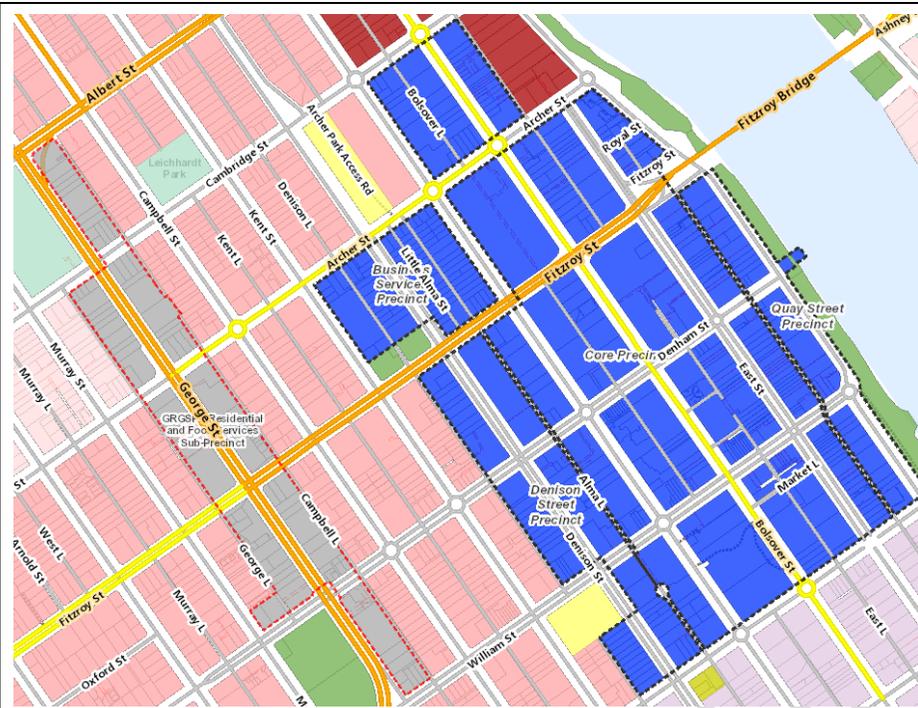


Figure 4-1 Principal Centre Precinct and George Street Specialised Centre

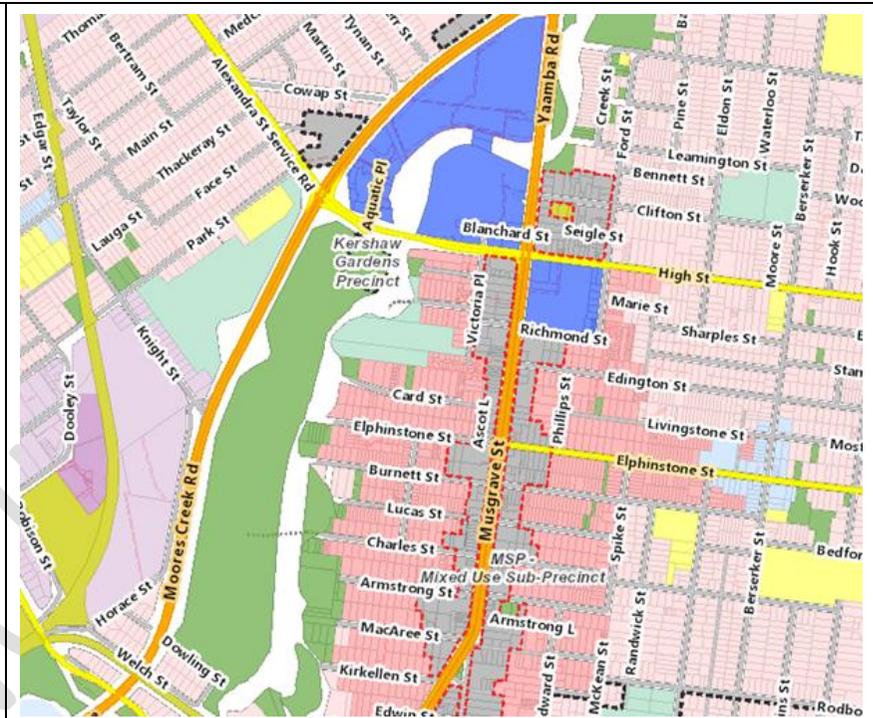


Figure 4-2 Major Centre and Musgrave Street Specialised Centre

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4.2 Existing Centres Assessment

Our existing centres assessment was prepared and informed by an inventory undertaken by Rockhampton Regional Council in January 2021. To supplement this information (and to provide qualitative commentary on each centre), CDM Smith personnel undertook comprehensive site inspections to centres zoned land servicing the Rockhampton Regional Council in March 2021. These site inspections provided on-the-ground information about the size, tenant composition, layout and accessibility of existing centres, as well as scoping the role and function of each centre. The site inspections also identified and quantified vacant tenancies within each centre, as well as vacant land parcels and remnant residential properties. The outcomes of the centres inventory represent the tenancy mix (including vacancies) of each centre at a single point of time and are subject to ongoing change.

An assessment of the quality of each tenancy was undertaken and given a grading of poor, average or high quality based on the following criteria, as summarised in Table 4-2.

Table 4-2 Qualitative Assessment Criteria for Tenancies

Condition	Qualitative Criteria
Poor	<ul style="list-style-type: none"> • Generally older built form showing signs of need for repair • Façade showing signs of ageing -e.g. faded or cracking paint • Roofing in serviceable condition but showing signs of wear • Internals of tenancies appear dated – e.g. flooring in poor condition, paint on walls in need of refresh
Average	<ul style="list-style-type: none"> • Generally built form less than 30 years old • Façade showing some signs of ageing but in reasonable condition • Roofing in good condition • Signs of refurbishment in the past 10-15 years (either internally, externally or both) • Internals of tenancies appear to have signs of refurbishment / modernization (e.g. repainted walls, flooring that has been replaced/refreshed)
High	<ul style="list-style-type: none"> • Generally modern or recently refurbished (<5 years) built form • Façade appears freshly painted in immaculate condition • Roofing recently replaced or refurbished / restored • Internals of tenancies in very good/immaculate condition (freshly painted, modern flooring)

Each existing tenancy in the centres network was classified in accordance with CDM Smith’s categories, with the main categories of interest being retail and commercial/office. The retail categories and sub-categories are as follows:

- Grocery and specialty:
 - Groceries and take home food;
 - Dining and take away food;
 - Clothing, footwear and apparel;
 - Personal and other goods;
 - Takeaway liquor;
- Bulky goods:

- Core bulky goods²;
- Ancillary bulky goods³; and
- Hardware.

Meanwhile, commercial/office categories and sub-categories were derived based on 2-Digit ANZSIC sectors that will likely require office space.

Table 4-3 below outlines the two-digit ANZSIC sectors which typically require office floor space.

Table 4-3 Two Digit ANZSIC Sectors which Typically Require Office Space

One Digit ANZSIC Sector	Two Digit ANZSIC Sectors
Financial & Insurance Services	<ul style="list-style-type: none"> • Finance • Insurance & Superannuation Funds • Auxiliary Finance & Insurance Services • Finance & Insurance Services, nfd
Professional, Scientific & Technical Services	<ul style="list-style-type: none"> • Professional, Scientific & Technical Services (except Computer Systems Design & Related Services) • Professional, Scientific & Technical Services, nfd • Computer Systems Design & Related Services
Health Care & Social Assistance	<ul style="list-style-type: none"> • Medical & Other Health Care Services
Rental, Hiring & Real Estate Services	<ul style="list-style-type: none"> • Property Operators & Real Estate Services
Public Administration & Safety	<ul style="list-style-type: none"> • Public Administration
Information Media & Telecommunications	<ul style="list-style-type: none"> • Internet Publishing & Broadcasting • Internet Service Providers, Web Search Portals & Data Processing Services
Administrative & Support Services	<ul style="list-style-type: none"> • Administrative services

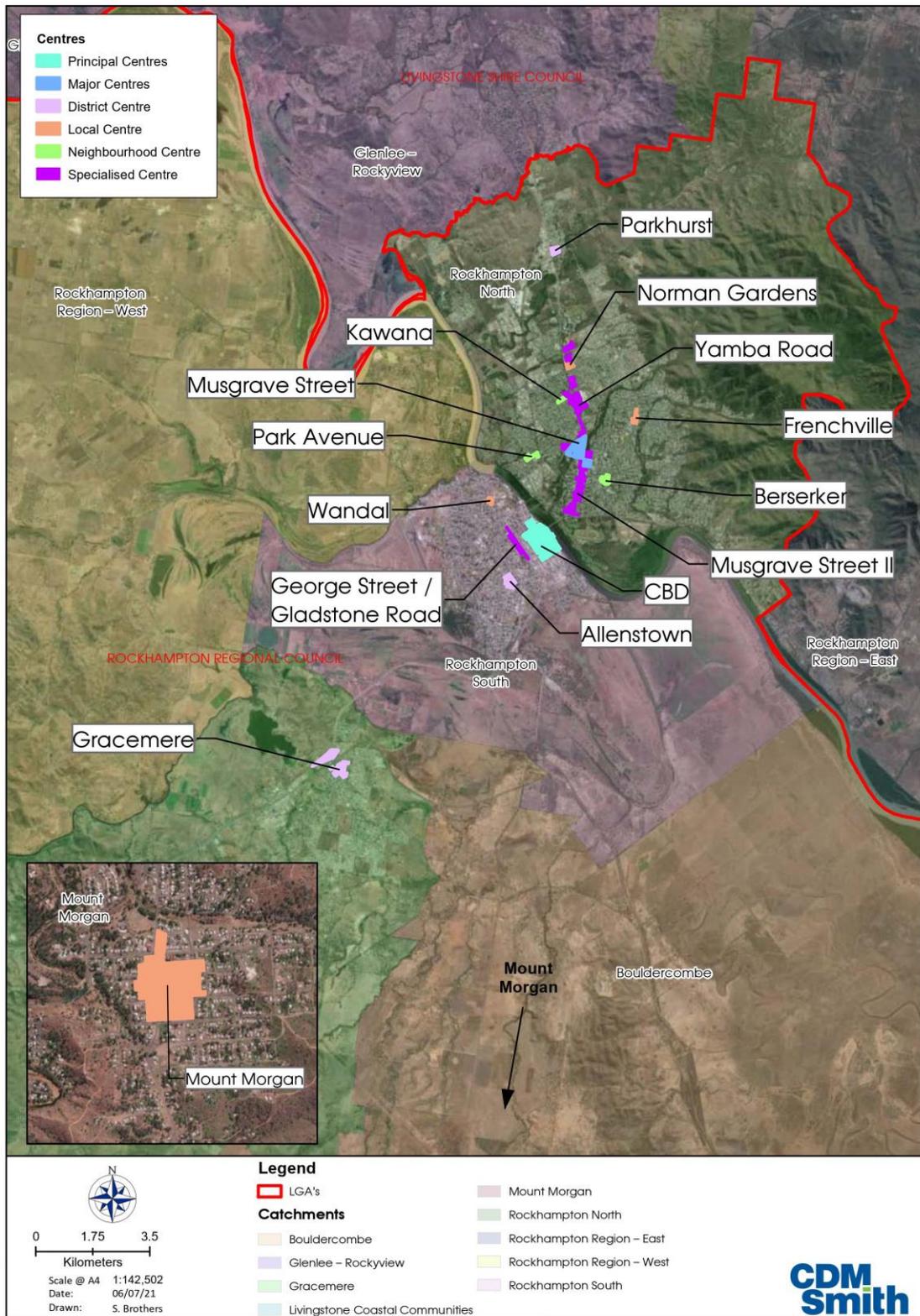
Source: CDM Smith Analysis

A map of the existing centres by zone is outlined in Figure 4-6 below.

² Core bulky goods include furniture and floor coverings, household appliances and audio-visual equipment and parts.

³ Ancillary bulky goods include blankets, household linen and household furnishings, glassware, tableware, cutlery and household utensils, home computer equipment, camping equipment and motor vehicle parts and accessories purchased separately.

Figure 4-6 Existing Centres Network by Catchment – Rockhampton Regional Council



4.2.1 Principal Centre

4.2.1.1 Rockhampton Central Business District (CBD)

The Rockhampton CBD is a principal centre zoning under the Rockhampton Planning Scheme, providing the highest concentration of retail and commercial activity within the broader region. The CBD principal centre covers an expansive area and provides commercial and retail offering in varying conditions. In addition to the commercial and retail offerings, the CBD contains various government and community services including the Court House, Police Headquarters and Council Chambers.

Site inspections in conjunction with documents provided by RRC identified approximately 88,953sqm of retail floor space across the CBD, with City Centre Plaza offering approximately 12,313sqm of retail floorspace. The major retail providers within the CBD included Coles (within the City Centre Plaza), Stewarts and Shop Smart. Further, the collection of street front retail along East Street offered several clothing, footwear and apparel, dining and take-away and personal and other goods retail tenancies (e.g. pharmacy).

Additionally, there was approximately 87,561sqm of commercial floorspace identified within the CBD principal centre. The commercial offerings were largely located along Quay Street, which contained several professional, scientific and technical services as well as administrative and support services. Quay Street was identified as being of high quality, with riverfront tenancies being a major attraction for professional businesses. In terms of other, approximately 59,911sqm was identified within the CBD principal centre, with community purposes accounting for the largest share, followed by industrial and other.

Collectively, there is approximately 280,181sqm of floorspace within the CBD principal centre that is comprised of retail floor space, commercial floor space, other floor space and vacant tenancies. As of March 2021, there was approximately 43,756sqm of vacant tenancies identified in the CBD. The major vacancies included the Arcade on East Street and several tenancies along Bolsover Street. Similarly, there was approximately 6,771sqm of vacant land identified. As for remnant residential, 101 properties were identified.

Table 4-4 below provides a summary of the CBD principal centre by use as of March 2021.

Table 4-4 Gross Floor Area (GFA) by Use, Rockhampton CBD Principal Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	5,279	1.9%
Dining and take-away food	17,925	6.4%
Clothing, footwear and apparel	12,768	4.6%
Personal and other goods	36,461	13.0%
Core bulky goods	4,925	1.8%
Ancillary bulky goods	5,378	1.9%
Hardware	5,339	1.9%
Take away liquor	878	0.3%
Total retail floor space	88,953	31.7%
Commercial		
Financial and insurance services	8,842	3.2%
Rental, hiring and real estate services	3,208	1.1%
Health care and social assistance	4,581	1.6%
Professional, scientific and technical services	37,161	13.3%

	Square Metres	Proportion of Total
Administrative and support services	33,769	12.1%
Total commercial floor space	87,561	31.3%
Other Uses		
Industrial	22,877	8.2%
Community Purposes	35,262	12.6%
Other	1,772	0.6%
Total Other Floorspace	59,911	21.4%
Vacant	43,756	15.6%
Total floor space	280,181	100.0%
Vacant Land	6,771	-
Remnant Residential (no.)	101	-

Source: CDM Smith, Rockhampton City Council (2021)

In terms of the overall quality, the CBD principal centre largely offered average to high quality retail and commercial tenancies. As mentioned in the proceeding section, commercial tenancies were predominately located Quay Street which offered high quality tenancies. Similarly, street retail offerings were largely located along East Street which were of poor to average quality. Meanwhile, the collection of retail tenancies in the old Arcade were deemed in poor condition. As for City Centre Plaza, this building was identified as being of high quality, having undergone refurbishments in recent years. The remainder of the CBD was identified as being predominately of average quality.

Table 4-5 below provides a summary of quality of floor space in the principal centre as of March 2021.

Table 4-5 Quality of Various Types by GFA Proportion, Principal Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	7.6%	47.5%	42.9%
Proportion of Total Commercial GFA	2.6%	41.0%	57.8%
Proportion of Total Industrial GFA	31.9%	35.6%	32.5%
Proportion of Total Community GFA	12.8%	35.1%	52.1%
Proportion of Total Other GFA	0.0%	41.8%	58.2%
Proportion of Total Vacant GFA	8.1%	68.9%	22.9%

Source: CDM Smith (2021)

Additionally, there were several retail and commercial tenants located outside the CBD principal centre zone within the low-medium density residential zoning from the corner of Albert and Campbell Street down to the corner of Denison and Albert Street. This mix consisted of approximately 2,779sqm of retail and 211sqm of commercial floorspace currently contained in residential houses along Albert Street. These tenancies were largely in poor to average condition. The current zone provisions allow for non residential uses which depend on a highway frontage to establish along this strip. Figure 4-7 outlines the Principal Centre zoned land in Rockhampton Central Business District, the vacant land parcels and the entirely vacant buildings within this centre.

Figure 4-7 Principal Centre – Rockhampton Central Business District, March 2021



4.2.2 Major Centre

4.2.2.1 Musgrave Street, Rockhampton

The Musgrave Street major centre zone is located approximately 2.5km from the CBD and runs north towards Parkhurst and Yeppoon. Major centre zoned land on Musgrave Street totals 75,345sqm of retail floorspace, 9,258sqm of commercial floorspace and 2,286sqm of other uses. As at March 2021, no vacant land parcels were identified within Musgrave Street Precinct. Meanwhile, 10 remnant residential properties and 2,321sqm of vacant tenancies were identified within this precinct.

The Stockland Shopping centre is the largest concentration of retail floorspace within the Musgrave Street major centre zone totalling 65,683sqm. In total, retail uses within Stockland accounted for 84.5% of the total GFA in this precinct. Stockland Shopping centre also provided a range of outdoor dining and entertainment offerings. Within the Stockland Shopping Centre there are two vacant tenancies estimated to total 437sqm.

The Musgrave Street major centre zone also accommodates the Northside Plaza Shopping Centre, which is anchored by a 4,372sqm Woolworths.

Collectively, there is approximately 89,211sqm of floorspace within the Musgrave Street Precinct that is comprised of retail floor space, commercial floor space and other floor space. The vacancy rate across the Musgrave Street major centre zone was approximately 2.6%.

Table 4-6 summarises the composition of floor space within major centre zoned land on Musgrave Street as of March 2021.

Table 4-6 Gross Floor Area (GFA) by Use, Musgrave Street Precinct, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	14,368	16.1%
Dining and take-away food	11,255	12.6%
Clothing, footwear and apparel	13,758	15.4%
Personal and other goods	24,693	27.7%
Core bulky goods	6,022	6.8%
Ancillary bulky goods	4,737	5.3%
Hardware	0	-
Take away liquor	512	0.6%
Total retail floor space	75,345	84.5%
Commercial		
Financial and insurance services	2,518	2.8%
Rental, hiring and real estate services	44	0.0%
Health care and social assistance	4,325	4.8%
Professional, scientific and technical services	1,993	2.2%
Administrative and support services	378	0.4%
Total commercial floor space	9,258	10.4%
Other		
Industrial	1,371	1.5%

	Square Metres	Proportion of Total
Community Purpose	915	1.0%
Other	-	-
Total Other Floorspace	2,286	2.6%
Vacant	2,321	2.6%
Total floor space	89,211	100.0%
Vacant Land	-	-
Remnant Residential (no.)	10	-

Source: CDM Smith Analysis (2021)

Additionally, an assessment of quality undertaken by CDM Smith found that almost all retail tenancies in the precinct were of a high quality (93.1%), likely due to the new Stockland shopping centre development. However, across the other types of tenancies (community, industrial, other and vacant), most tenancies were of an average condition with some minor damage or weathering to façade of the building.

A summary of the condition of tenancies on Musgrave Street, within the major centre zone, is listed below in Table 4-7.

Table 4-7 Quality of Various Types by GFA Proportion, Musgrave Street Precinct, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	0.2%	6.7%	93.1%
Proportion of Total Commercial GFA	1.1%	30.2%	68.7%
Proportion of Total Industrial GFA	18.3%	81.7%	0.0%
Proportion of Total Community GFA	0.0%	100.0%	0.0%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	9.3%	67.0%	23.7%

Source: CDM Smith, Rockhampton City Council (2021)

Figure 4-8 outlines the Major Centre zoned land along Musgrave Street and the entirely vacant buildings within this centre (note that there are no vacant land parcels within this centre).

Figure 4-8 Major Centre – Musgrave Street, Rockhampton, March 2021



4.2.3 District Centre

4.2.3.1 Gracemere

The District Centre located in Gracemere, some 10km south-west of Rockhampton CBD, largely provided retail offerings and commercial tenancies.

Gracemere Shopping Centre was identified as the main retail hub within Gracemere, containing approximately 9,238sqm of retail floorspace with major tenants including Woolworths, Best and Less and several national retailers. Site inspections identified approximately 180sqm of tenant vacancies within the Gracemere Shopping Centre. In terms of condition, the shopping centre was of a high quality.

The balance of the district centre in Gracemere consisted of street retail located along Russell Street, John Street, Lawrie Street and McLaughlin Street. The major street retail offerings included Foodworks along Lawrie Street and collection of health care services on the top of Russell Street. Further, McLaughlin Street contained the Gracemere Hotel and Liquor Store and several small commercial tenancies.

Collectively, there is approximately 21,406sqm of floorspace within the Gracemere District centre that is comprised of retail floor space, commercial floor space and other floor space. The vacancy rate across the Gracemere District centre zone was approximately 2.8%.

Additionally, there were several vacant lots identified adjacent to the shopping centre. These vacant lots are anticipated to accommodate the future expansion of the shopping centre. Approximately 22,375sqm of vacant land was identified, with vacant tenancies within Gracemere District Centre totalling 594sqm. As for remnant residential, 29 properties were identified.

Table 4-8 below provides a summary of the Gracemere district centre by use as of March 2021.

Table 4-8 Gross Floor Area (GFA) by Use, Gracemere District Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	6,514	30.4%
Dining and take-away food	1,407	6.6%
Clothing, footwear and apparel	848	4.0%
Personal and other goods	3,934	18.4%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	1,500	7.0%
Take away liquor	1,703	8.0%
Total retail floor space	15,907	74.3%
Commercial		
Financial and insurance services	352	1.6%
Rental, hiring and real estate services	91	0.4%
Health care and social assistance	759	3.5%
Professional, scientific and technical services	320	1.5%
Administrative and support services	-	-
Total commercial floor space	1,522	7.1%

	Square Metres	Proportion of Total
Other Uses		
Industrial	-	-
Community Purposes	3,383	15.8%
Other	-	-
Total Other Floorspace	3,383	15.8%
Vacant	594	2.8%
Total floor space	21,406	100.0%
Vacant Land	22,375	-
Remnant Residential (no.)	29	-

Source: CDM Smith, Rockhampton City Council (2021)

As previously mentioned, the Gracemere Shopping Centre, which contained the highest concentration of retail offerings, was largely of high quality having been developed in recent years. The retail offerings outside of the Gracemere Shopping Centre were identified as being of average quality. Additionally, commercial offerings within this district centre were predominately of average quality.

Table 4-9 below provides a summary of the quality of floor space in the Gracemere district centre as at March 2021.

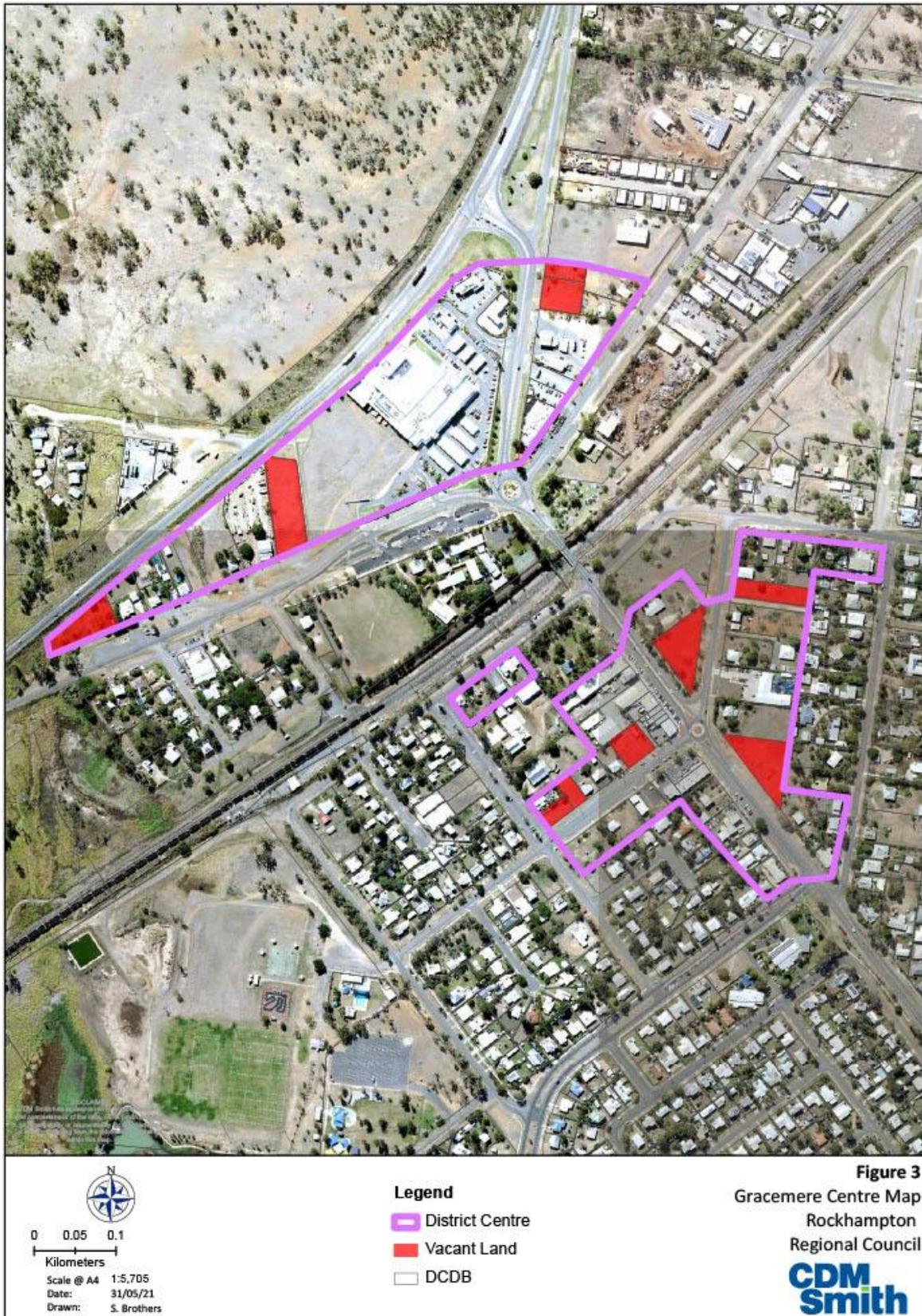
Table 4-9 Quality of Various Types by GFA Proportion, Gracemere District Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	1.9%	41.9%	56.2%
Proportion of Total Commercial GFA	6.7%	33.0%	60.3%
Proportion of Total Industrial GFA	-	-	-
Proportion of Total Community GFA	0.0%	15.7%	12.0%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	0.0%	12.5%	5.4%

Source: CDM Smith (2021)

Figure 4-9 outlines the District Centre zoned land in Gracemere in addition to vacant land parcels and the entirely vacant buildings within this centre, including the current vacant lots to accommodate the Stage 2 approval of the Gracemere Shopping Centre .

Figure 4-9 District Centre – Gracemere, March 2021



4.2.3.2 Allenstown

The Allenstown District Centre consisted of the Allenstown Square and street retail predominately along Upper Dawson Road, Canning Street and Patrick Street. In addition to the retail uses, this district centre contained industrial and community uses.

There was approximately 14,264sqm of retail floorspace contained within this district centre, with the largest concentration located in the Allenstown Square (10,514sqm). Allenstown Square was anchored by Woolworths (4,121sqm) and was of high quality. Whereas, the remainder of retail tenancies comprised of Dan Murphy's (1,766sqm), Rockhampton Mavericks Western Wear (326sqm) and Darryl Randle Men's Barber (296sqm). Interestingly, there were limited commercial offerings contained in this district centre.

Collectively, there is approximately 17,900sqm of floorspace within the Allenstown District Centre that is comprised of retail floor space, commercial floor space, other floor space and vacant tenancies. As of March 2021, approximately 3,138sqm of vacant land was identified across Allenstown District Centre, along with 744 sqm of vacant tenancies. As for remnant residential, 28 properties were identified.

Table 4-10 below provides a summary of Allenstown District Centre floor space by use as of March 2021.

Table 4-10 Gross Floor Area (GFA) by Use, Allenstown District Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	4,888	27.3%
Dining and take-away food	2,566	14.3%
Clothing, footwear and apparel	1,453	8.1%
Personal and other goods	3,323	18.6%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	77	0.4%
Take away liquor	1,957	10.9%
Total retail floor space	14,264	79.7%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	-	-
Health care and social assistance	959	5.4%
Professional, scientific and technical services	-	-
Administrative and support services	46	0.3%
Total commercial floor space	1,005	5.6%
Other		
Industrial	454	2.5%
Community Purpose	1,321	7.4%
Other	112	0.6%
Total Other Floorspace	1,887	10.5%
Vacant	744	4.2%

	Square Metres	Proportion of Total
Total floor space	17,900	100.0%
Vacant Land	3,138	-
Remnant Residential (no.)	28	-

Source: CDM Smith, Rockhampton City Council (2021)

As mentioned in the preceding sections, the Allenstown Square, which contained the highest concentration of retail offerings, was largely of high quality. The retail offerings outside of the major centre were identified as being of average quality. Additionally, commercial offerings within this district centre were identified as being in poor condition.

Table 4-11 below provides a summary of quality of floor space in the Allenstown district centre as at March 2021.

Table 4-11 Quality of Various Types by GFA Proportion, Allenstown District Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	0.7%	34.6%	64.7%
Proportion of Total Commercial GFA	4.6%	0.0%	95.4%
Proportion of Total Industrial GFA	100.0%	0.0%	0.0%
Proportion of Total Community GFA	0.0%	100.0%	0.0%
Proportion of Total Other GFA	0.0%	100.0%	0.0%
Proportion of Total Vacant GFA	30.0%	27.1%	42.9%

Source: CDM Smith (2021)

Figure 4-10 outlines the District Centre zoned land in Allenstown in addition to vacant land parcels and the entirely vacant buildings within this centre.

Figure 4-10 District Centre – Allenstown, March 2021



4.2.3.3 Parkhurst

The Parkhurst district centre consists of the Parkhurst Town Centre (shopping centre), a Puma service station and the Parkhurst Tavern. In total, there is an estimated 8,873sqm of retail floorspace, with the largest tenant being the 3,800sqm Woolworths supermarket. Within this district centre there is approximately 800sqm of commercial tenancies (attributable to the health care facilities located within the precinct).

Collectively, there is approximately 9,995sqm of floorspace within the Parkhurst District. As of March 2021, there was 1,275sqm of vacant specialty tenancies identified within the Parkhurst Town Centre. No vacant land or remnant residential properties were identified in Parkhurst District Centre.

Table 4-12 below provides a summary of Parkhurst District Centre GFA by use as at March 2021.

Table 4-12 Gross Floor Area (GFA) by Use, Parkhurst District Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	4,908	49.1%
Dining and take-away food	1,887	18.9%
Clothing, footwear and apparel	-	-
Personal and other goods	965	9.7%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	-	-
Take away liquor	160	1.6%
Total retail floor space	7,920	79.2%
Commercial		
Financial and insurance services	160	1.6%
Rental, hiring and real estate services	-	-
Health care and social assistance	480	4.8%
Professional, scientific and technical services	-	-
Administrative and support services	160	1.6%
Total commercial floor space	800	8.0%
Other		0.0%
Industrial	-	-
Community Purpose	-	-
Other	-	-
Total Other Floorspace	-	-
Vacant	1,275	12.8%
Total floor space	9,995	100.0%
Vacant Land	-	-
Remnant Residential (no.)	-	-

Source: CDM Smith, Rockhampton City Council (2021)

As the Parkhurst district centre has been developed recently, all retail GFA has been deemed as high quality.

Table 4-13 below provides a summary of quality of floor space within the Parkhurst District Centre as at March 2021.

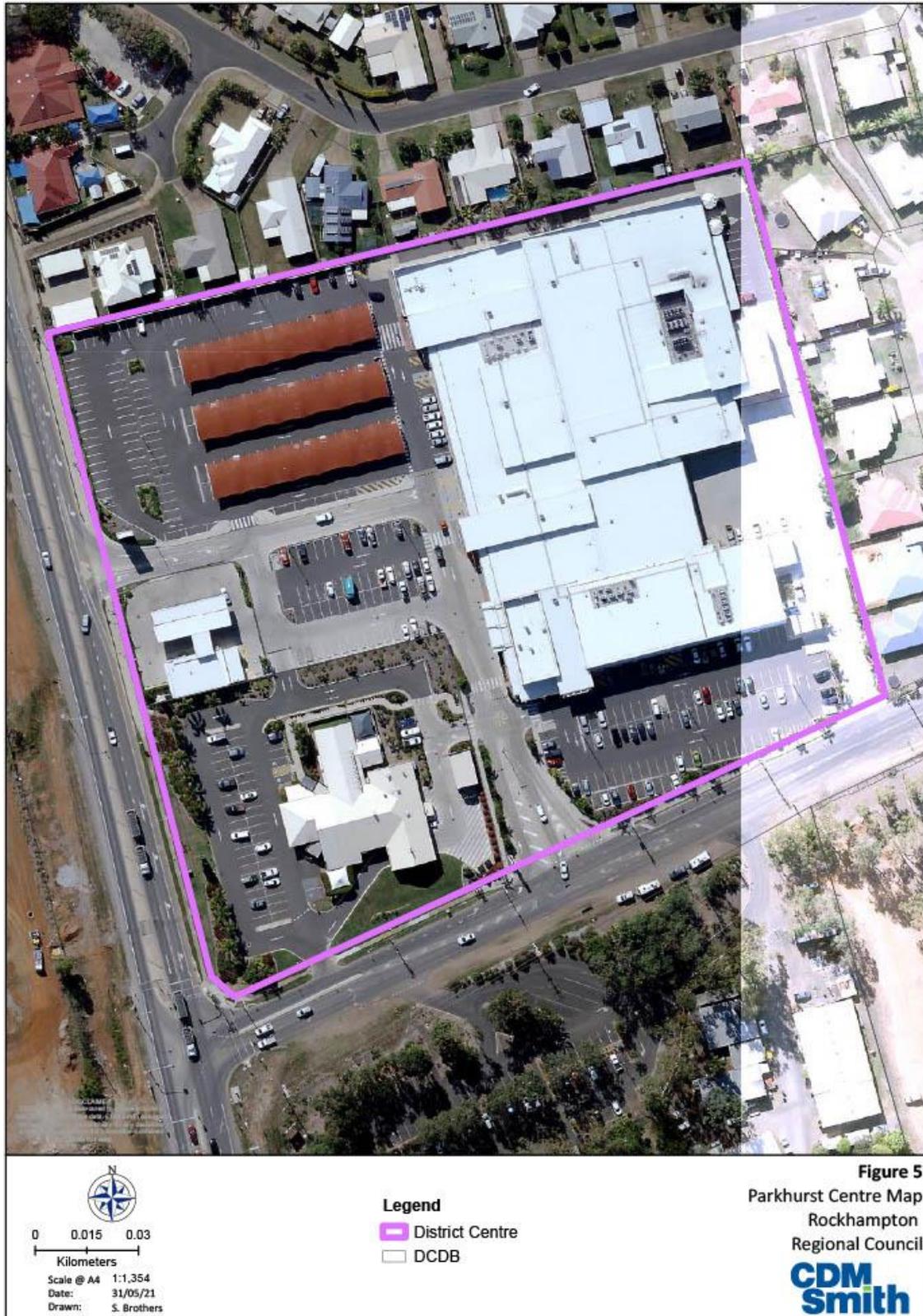
Table 4-13 Quality of Various Types by GFA, Parkhurst District Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	0.0%	0.0%	100.0%
Proportion of Total Commercial GFA	0.0%	0.0%	100.0%
Proportion of Total Industrial GFA	-	-	-
Proportion of Total Community GFA	-	-	-
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	-	-	-

Source: CDM Smith Analysis (2021)

Figure 4-11 outlines the District Centre zoned land in Parkhurst.

Figure 4-11 District Centre – Parkhurst, March 2021



4.2.4 Local Centre

4.2.4.1 Mount Morgan

The Mount Morgan local centre is comprised of 4,869sqm of retail floorspace and further 359sqm of commercial floorspace. The IGA located on the top of Dee Street was approximately 816sqm in size and aimed to serve the immediate grocery and convenience needs of residents. Furthermore, Morgan Street contained the highest concentration of street retail within the local centre. Site inspections identified the Morgan Street precinct as undergoing landscaping and pavement improvements in recent years. However, the retail tenancies were of average quality, with paint and signage fading in some of the tenancies. Further, the centre offerings located along were identified as being of poor quality and were predominately vacant. Relevantly, this local centre also contained several community services including a school, police, and library.

Collectively, there is approximately 20,747sqm of floorspace within Mount Morgan Local Centre that is comprised of retail floor space, commercial floor space, other floor space and significant vacant tenancies (16.0% of total floor space). As of March 2021, approximately 4,002sqm of vacant land was identified across Mount Morgan Local Centre, along with 3,314sqm of vacant tenancies, representing a vacancy rate of 16.0%. As for remnant residential, 17 properties were identified.

Table 4-14 below provides a summary of Mount Morgan local centre GFA by use as at March 2021.

Table 4-14 Gross Floor Area (GFA) by Use, Mount Morgan Local Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	1,062	5.1%
Dining and take-away food	2,062	9.9%
Clothing, footwear and apparel	258	1.2%
Personal and other goods	967	4.7%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	520	2.5%
Take away liquor	-	-
Total retail floor space	4,869	23.5%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	-	-
Health care and social assistance	86	0.4%
Professional, scientific and technical services	116	0.6%
Administrative and support services	157	0.8%
Total commercial floor space	359	1.7%
Other Uses		
Industrial	-	-
Community Purposes	12,205	58.8%
Other	-	-

	Square Metres	Proportion of Total
Total Other Floorspace	12,205	58.8%
Vacant	3,314	16.0%
Total floor space	20,747	100.0%
Vacant Land	4,002	-
Remnant Residential (no.)	17	-

Source: CDM Smith, Rockhampton City Council (2021)

The retail and commercial offerings in the Mount Morgan local centre were identified as being of poor to average quality. Interestingly, approximately 84.0% of vacant tenancies were identified as being in poor condition. However, the community-based services were deemed as of average and high quality.

Table 4-15 below provides a summary of quality of various types by GFA proportion in the Mount Morgan local centre as at March 2021.

Table 4-15 Quality of Various Types by GFA Proportion, Mount Morgan Local Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	48.1%	51.9%	0.0%
Proportion of Total Commercial GFA	24.0%	76.0%	0.0%
Proportion of Total Industrial GFA	-	-	-
Proportion of Total Community GFA	8.9%	60.1%	30.9%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	83.9%	5.4%	0.0%

Source: CDM Smith (2021)

Figure 4-12 outlines the Local Centre zoned land in Mount Morgan in addition to vacant land parcels and the entirely vacant buildings within this centre.

Figure 4-12 Local Centre – Mount Morgan, March 2021



4.2.4.2 Norman Gardens (Farm Street)

The Norman Gardens local centre located on the corner of the Bruce Highway and Farm Street comprised of the Glenmore Shopping Village and several stand-alone centres. The Glenmore Shopping Village is anchored by Drakes (2,007sqm). Outside Glenmore Village, the centre contains a McDonald's (357sqm), Red Rooster (279sqm) and Glenmore Tavern and BWS Drive Thru (1,096sqm).

Collectively, there is approximately 5,591sqm of floorspace within Norman Gardens Local Centre that is comprised of retail floor space and other floor space, with no commercial floor space identified. The vacancy rate across the Norman Gardens local centre zone was approximately 14.4%.

The site inspections and information provided by Rockhampton Regional Council identified approximately 937sqm of vacant tenancies in this local centre. As of March 2021, no vacant land or remnant residential properties were identified.

Table 4-16 below provides a summary of Norman Gardens local centre GFA by use types as of March 2021.

Table 4-16 Gross Floor Area (GFA) by Use, Norman Gardens Local Centre (Farm Street), March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	2,007	30.7%
Dining and take-away food	1,518	23.3%
Clothing, footwear and apparel	-	-
Personal and other goods	592	9.1%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	-	-
Take away liquor	1,268	19.4%
Total retail floor space	5,385	82.5%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	-	-
Health care and social assistance	-	-
Professional, scientific and technical services	-	-
Administrative and support services	-	-
Total commercial floor space	-	-
Other		
Industrial	-	-
Community Purpose	206	3.2%
Other	-	-
Total Other Floorspace	206	3.2%
Vacant	937	14.4%
Total floor space	6,528	100.0%

	Square Metres	Proportion of Total
Vacant Land	-	-
Remnant Residential (no.)	-	-

Source: CDM Smith, Rockhampton City Council (2021)

The retail offerings in the Norman Gardens local centre were identified as being of average (25.5% of all retail) to high (63.1% of all retail) quality, with the Drakes appearing to be recently refurbished. However, all vacant tenancies were identified as being in poor condition.

Table 4-17 below provides a summary of quality of various types by GFA proportion in the Norman Gardens local centre as at March 2021.

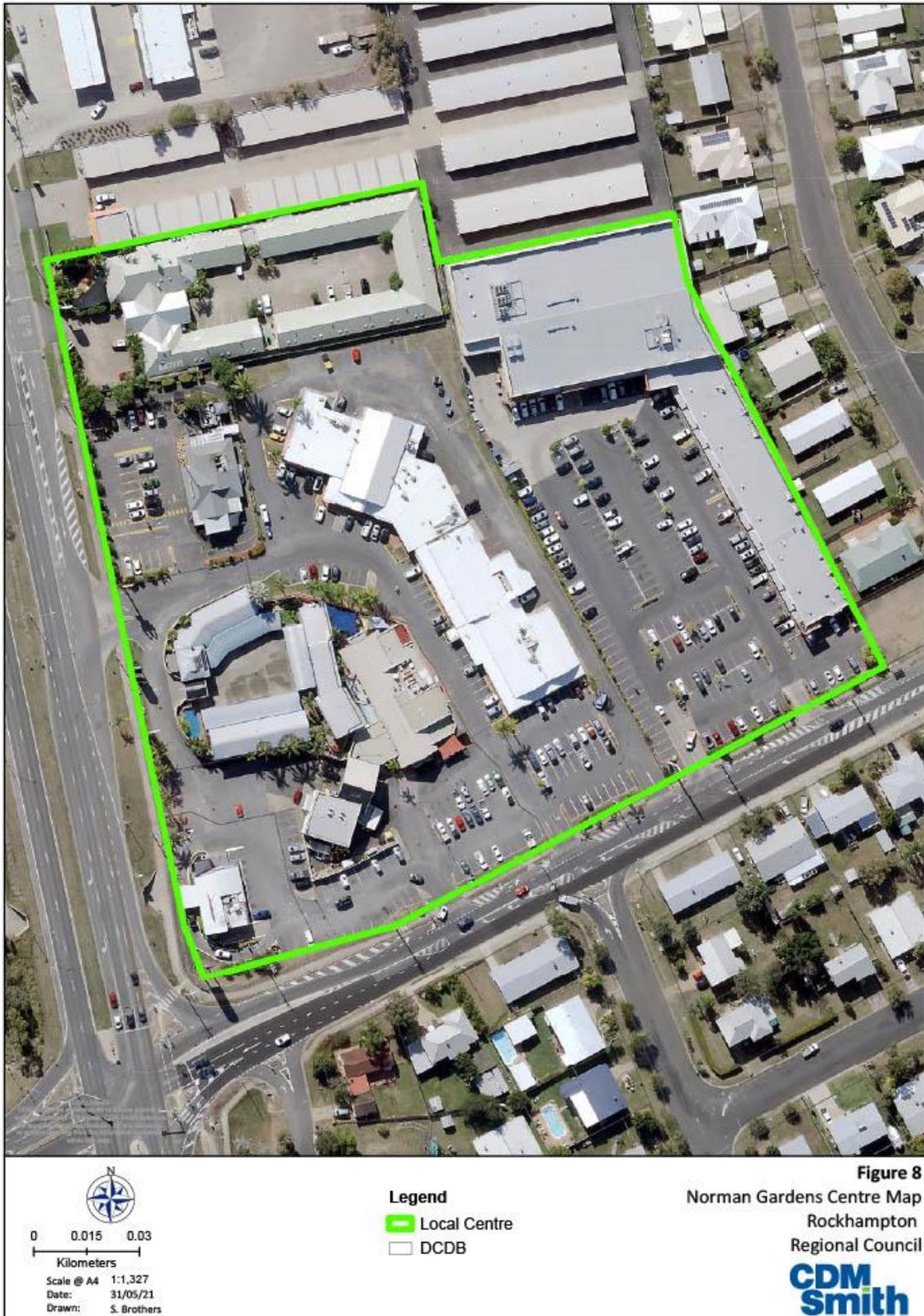
Table 4-17 Quality of Various Types by GFA Proportion, Norman Gardens Local Centre (Farm Street), March 2021

	Poor	Average	High
Proportion of Total Retail GFA	11.4%	25.5%	63.1%
Proportion of Total Commercial GFA	-	-	-
Proportion of Total Industrial GFA	-	-	-
Proportion of Total Community GFA	100.0%	0.0%	0.0%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	100.0%	0.0%	0.0%

Source: CDM Smith (2021)

Figure 4-13 outlines the Local Centre zoned land in Norman Gardens.

Figure 4-13 Local Centre – Norman Gardens (Farm Street), March 2021



4.2.4.3 Frenchville

The Frenchville local centre is comprised of 5,282sqm of retail floorspace and further 1,099sqm of commercial floorspace. The Peries IGA on Dean Street is the largest tenancy in the centre, totalling 1,500sqm.

Additionally, there were four lots (over two street addresses) which were classified as health care and social assistance tenancies. These tenancies include a physiotherapist, a pharmacy and a dentist with a combined GFA in the order of 1,099sqm.

Collectively, there is approximately 7,990sqm of floorspace within Frenchville Local Centre that is comprised of retail floor space, commercial floor space, other floor space and vacant tenancies. Within the Frenchville local centre there were also three remnant residential properties and 939sqm of vacant tenancies. As of March 2021, no vacant land was identified within Frenchville Local Centre.

Table 4-18 below provides a summary of Frenchville local centre GFA by use types as at March 2021.

Table 4-18 Use Gross Floor Area (GFA) by Use, Frenchville Local Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	2,091	26.2%
Dining and take-away food	1,866	23.4%
Clothing, footwear and apparel	-	-
Personal and other goods	746	9.3%
Core bulky goods	-	-
Ancillary bulky goods	79	1.0%
Hardware	250	3.1%
Take away liquor	250	3.1%
Total retail floor space	5,282	66.1%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	-	-
Health care and social assistance	1,099	13.8%
Professional, scientific and technical services	-	-
Administrative and support services	-	-
Total commercial floor space	1,099	13.8%
Other		
Industrial	527	-
Community Purpose	143	1.8%
Other	-	-
Total Other Floorspace	670	8.4%
Vacant	939	11.7%
Total floor space	7,990	100.0%
Vacant Land	-	-

	Square Metres	Proportion of Total
Remnant Residential (no.)	3	-

Source: CDM Smith, Rockhampton City Council (2021)

The retail offerings within the Frenchville local centre were similarly distributed between poor, average and high quality buildings. However, there were no high quality commercial offerings (or vacant tenancies) in the local centre, rather, over two-fifths of all tenancies were deemed to be of a poor quality.

Table 4-19 below provides a summary of quality of various types by GFAs within the Frenchville local centre as at March 2021.

Table 4-19 Quality of Various Types by GFA, Frenchville Local Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	32.9%	33.1%	34.0%
Proportion of Total Commercial GFA	42.8%	57.2%	0.0%
Proportion of Total Industrial GFA	0.0%	0.0%	100.0%
Proportion of Total Community GFA	-	-	-
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	42.9%	57.1%	0.0%

Source: CDM Smith Analysis (2021)

Figure 4-14 outlines the Local Centre zoned land in Frenchville in addition to identifying the entirely vacant buildings within this centre.

Figure 4-14 Local Centre – Frenchville, March 2021



4.2.5 Neighbourhood Centre

4.2.5.1 Wandal

The Wandal neighbourhood centre is a collection of street facing retail predominately located along Wandal Road. Within this local centre, there was approximately 3,422sqm of retail floorspace, with Peries IGA (957sqm) and the Lionleigh Pub and Cellarbrations (340sqm) as major tenants. Further, there was approximately 176sqm of commercial tenancies identified which contained administrative and support services.

Collectively, there is approximately 5,099sqm of floorspace within Wandal neighbourhood centre that is comprised of retail floor space, commercial floor space and other floor space. The vacancy rate across the Wandal neighbourhood centre zone was approximately 11.0%.

As of March 2021, no vacant land was identified and there was approximately 559sqm of vacant tenancies. As for remnant residential, 8 properties were identified.

Table 4-20 below provides a summary of Wandal neighbourhood centre GFA by use types as at March 2021.

Table 4-20 Gross Floor Area (GFA) by Use, Wandal Neighbourhood Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	1,490	29.2%
Dining and take-away food	81	1.6%
Clothing, footwear and apparel	81	1.6%
Personal and other goods	597	11.7%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	-	-
Take away liquor	1,173	23.0%
Total retail floor space	3,422	67.1%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	-	-
Health care and social assistance	-	-
Professional, scientific and technical services	-	-
Administrative and support services	176	3.5%
Total commercial floor space	176	3.5%
Other		
Industrial	646	12.7%
Community Purpose	296	5.8%
Other	-	-
Total Other Floorspace	942	18.5%
Vacant	559	11.0%
Total floor space	5,099	100.0%

	Square Metres	Proportion of Total
Vacant Land	-	-
Remnant Residential (no.)	8	-

Source: CDM Smith, Rockhampton City Council (2021)

The retail offerings in the Wandal neighbourhood centre were identified as being of average to high quality. All vacant tenancies were identified as being in average condition. Furthermore, the community-based and industrial services were largely deemed as of average quality.

Table 4-21 below provides a summary of quality of various types by GFA proportion in the Wandal neighbourhood centre as at March 2021.

Table 4-21 Quality of Various Types by GFA Proportion, Wandal Neighbourhood Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	10.2%	45.9%	43.8%
Proportion of Total Commercial GFA	0.0%	100.0%	0.0%
Proportion of Total Industrial GFA	0.0%	100.0%	0.0%
Proportion of Total Community GFA	0.0%	100.0%	0.0%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	0.0%	100.0%	0.0%

Source: CDM Smith (2021)

Figure 4-15 outlines the Neighbourhood centre zoned land in Wandal.

Figure 4-15 Neighbourhood Centre – Wandal, March 2021



4.2.5.2 Kawana

The Kawana neighbourhood centre is largely concentrated along Richardson Road and is predominately comprised of retail tenancies.

There was approximately 3,256sqm of retail floor space identified in this neighbourhood centre, with Food Sing Trading (591sqm), Tubman's Trade (524sqm) and FoodWorks (440sqm) serving as the major tenants. Furthermore, there was approximately 490sqm of commercial floorspace in this neighbourhood centre, representing 10.1% of all available floorspace in the area.

Collectively, there is approximately 4,868 sqm of floorspace within Kawana Neighbourhood Centre that is comprised of retail floor space, commercial floor space, other floor space and vacant tenancies. As of March 2021, no vacant land and no remnant residential properties were identified. Meanwhile, site inspections estimated approximately 376sqm of vacant tenancies.

Table 4-22 below provides a summary of Kawana Neighbourhood Centre GFA by use types as of March 2021.

Table 4-22 Gross Floor Area (GFA) by Use, Kawana Neighbourhood Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	1,451	29.8%
Dining and take-away food	213	4.4%
Clothing, footwear and apparel	-	-
Personal and other goods	928	19.1%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	524	10.8%
Take away liquor	140	2.9%
Total retail floor space	3,256	66.9%
Commercial		
Financial and insurance services	130	2.7%
Rental, hiring and real estate services	-	-
Health care and social assistance	-	-
Professional, scientific and technical services	-	-
Administrative and support services	360	7.4%
Total commercial floor space	490	10.1%
Other		
Industrial	-	-
Community Purpose	746	15.3%
Other	-	-
Total Other Floorspace	746	15.3%
Vacant	376	7.7%
Total floor space	4,868	100.0%

	Square Metres	Proportion of Total
Vacant Land	-	-
Remnant Residential (no.)	-	-

Source: CDM Smith, Rockhampton City Council (2021)

There were no high-quality tenancies on offer identified in the Kawana neighbourhood centre, with retail and commercial tenants largely in poor condition.

Table 4-23 below provides a summary of quality of various types by GFA proportion in the Kawana neighbourhood centre as of March 2021.

Table 4-23 Quality of Various Types by GFA Proportion, Kawana Neighbourhood Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	70.4%	29.6%	0.0%
Proportion of Total Commercial GFA	100.0%	0.0%	0.0%
Proportion of Total Industrial GFA	-	-	-
Proportion of Total Community GFA	28.2%	71.8%	0.0%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	22.1%	77.9%	0.0%

Source: CDM Smith (2021)

Figure 4-16 outlines the Neighbourhood Centre zoned land in Kawana.

Figure 4-16 Neighbourhood Centre – Kawana, March 2021



4.2.5.3 Berserker

The Berserker Neighbourhood centre is located less than 3km from the Rockhampton City centre and constitutes approximately 46 lots and 9,060sqm of floorspace. The Berserker neighbourhood centre is largely retail uses (5,394sqm), which account for 59.5% of total floorspace. The most significant retail uses are Hardware retailing (new Mitre 10 on Elphinstone Street) and personal and other goods retailing (two hair salons).

Commercial space in the Berserker neighbourhood centre accounts for 6.2% of all floorspace, with administrative and support services being the most significant contributor to this category. Notably, there are no vacant land parcels within this centre, however, there are 11 remnant residential properties and approximately 440sqm of vacant tenancies.

Table 4-24 summarises the occupancy of the Berserker Neighbourhood Centre as of March 2021.

Table 4-24 Gross Floor Area (GFA) by Use, Berserker Neighbourhood Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	504	5.6%
Dining and take-away food	78	0.9%
Clothing, footwear and apparel	221	2.4%
Personal and other goods	1,115	12.3%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	3,477	38.4%
Take away liquor	-	-
Total retail floor space	5,394	59.5%
Commercial		
Financial and insurance services	119	1.3%
Rental, hiring and real estate services	140	1.5%
Health care and social assistance	72	0.8%
Professional, scientific and technical services	-	-
Administrative and support services	233	2.6%
Total commercial floor space	564	6.2%
Other		
Industrial	620	6.8%
Community Purpose	2,043	22.5%
Other	-	-
Total Other Floorspace	2,662	29.4%
Vacant	440	4.9%
Total floor space	9,060	100.0%
Vacant Land	-	-
Remnant Residential (no.)	11	-

Source: CDM Smith, Rockhampton City Council (2021)

Additionally, an assessment of quality undertaken by CDM Smith found that almost all retail tenancies in the precinct were of a high quality (73.8%). However, all industrial tenancies within the centre were deemed to be of a poor quality.

A summary of the condition of tenancies within the Berserker Neighbourhood Centre, is listed below in Table 4-25.

Table 4-25 Quality of Various Types by GFA Proportion, Berserker Neighbourhood Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	14.1%	12.1%	73.8%
Proportion of Total Commercial GFA	37.6%	62.4%	0.0%
Proportion of Total Industrial GFA	100.0%	0.0%	0.0%
Proportion of Total Community GFA	8.4%	91.6%	0.0%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	100.0%	0.0%	0.0%

Source: CDM Smith Analysis (2021)

Figure 4-17 outlines the Neighbourhood Centre zoned land in Berserker in addition to the entirely vacant buildings within this centre.

Figure 4-17 Neighbourhood Centre – Berserker, March 2021



4.2.5.4 Park Avenue

The Park Avenue neighbourhood centre is located less than 4km from the Rockhampton CBD. This centre primarily services the convenience retail needs of the local population and the nearby industrial areas.

In total, this centre has 6,164sqm of GFA on offer for retail, industrial and vacant tenancies, with no commercial uses. The centre has a small (107sqm) industrial tenancy, with retail floorspace accounting for 86.3% of the centre. The retail GFA is largely driven by take-away liquor retailing, where the major tenant is the PA Hotel Motel and Star Liquor on Haynes Street.

Within the Park Avenue neighbourhood centre there are no vacant land parcels as at March 2021. Additionally, there is approximately 740sqm of vacant tenancies and nine remnant residential properties.

Table 4-26 below provides a summary of Park Avenue neighbourhood centre GFA by use as at March 2021.

Table 4-26 Gross Floor Area (GFA) by Use, Park Avenue Neighbourhood Centre, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	1,226	19.9%
Dining and take-away food	65	1.1%
Clothing, footwear and apparel	-	-
Personal and other goods	631	10.2%
Core bulky goods	-	-
Ancillary bulky goods	-	-
Hardware	-	-
Take away liquor	3,394	55.1%
Total retail floor space	5,317	86.3%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	-	-
Health care and social assistance	-	-
Professional, scientific and technical services	-	-
Administrative and support services	-	-
Total commercial floor space	-	-
Other		
Industrial	107	1.7%
Community Purpose	-	-
Other	-	-
Total Other Floorspace	107	1.7%
Vacant	740	12.0%
Total floor space	6,164	100.0%
Vacant Land	-	-

	Square Metres	Proportion of Total
Remnant Residential (no.)	9	-

Source: CDM Smith, Rockhampton City Council (2021)

The retail offerings in the Park Avenue neighbourhood centre were identified as being mostly of a high quality (78.9% of GFA). Interestingly, approximately 52.7% of vacant tenancies were identified as being in poor condition. Similarly, the industrial uses within the centre were all identified as being in poor condition, with evident property damage and/or significantly weathered buildings.

Table 4-27 below provides a summary of quality of various types by GFA proportion in the Park Avenue neighbourhood centre as at March 2021.

Table 4-27 Quality of Various Types by GFA Proportion, Park Avenue Neighbourhood Centre, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	21.1%	0.0%	78.9%
Proportion of Total Commercial GFA	-	-	-
Proportion of Total Industrial GFA	100.0%	0.0%	0.0%
Proportion of Total Community GFA	-	-	-
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	52.7%	0.0%	47.3%

Source: CDM Smith Analysis (2021)

Figure 4-18 outlines the Neighbourhood Centre zoned land in Park Avenue.

Figure 4-18 Neighbourhood Centre – Park Avenue, March 2021



4.2.6 Specialised Centre

4.2.6.1 George Street/Gladstone Road

The George Street/Gladstone Road specialised centre precinct extended from Allenstown to Rockhampton and provided a mix of street facing retail, commercial, industrial and community uses.

There was approximately 30,538sqm of retail floorspace identified within this specialised centre precinct. The retail uses on Gladstone Road comprised of new Aldi (1,999sqm) and Fantastic Furniture (3,169sqm). Furthermore, retail tenancies predominately consisted of a collection of retailers located on 118-130 George Street and 111 George Street. The uses along this precinct predominately consist of highway orientated businesses including take-away (new Carl's Jr) and accommodation.

The commercial offering along this precinct was limited and comprised of 824sqm, whilst other uses totalled 2,961sqm and were primarily for industrial and community purposes. Collectively, there is approximately 39,268sqm of floorspace within George Street/Gladstone Road specialised centre.

As of March 2021, approximately 11,893sqm of vacant land was identified, along with 4,945sqm of vacant tenancies. As for remnant residential, 49 properties were identified.

Table 4-28 below provides a summary of George Street/Gladstone Road specialised centre GFA by use as at March 2021.

Table 4-28 Gross Floor Area (GFA) by Use, George Street/Gladstone Road, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	5,726	14.6%
Dining and take-away food	4,311	11.0%
Clothing, footwear and apparel	2,902	7.4%
Personal and other goods	3,073	7.8%
Core bulky goods	390	1.0%
Ancillary bulky goods	3,720	9.5%
Hardware	9,599	24.4%
Take away liquor	817	2.1%
Total retail floor space	30,538	77.8%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	-	-
Health care and social assistance	-	-
Professional, scientific and technical services	284	0.7%
Administrative and support services	540	1.4%
Total commercial floor space	824	2.1%
Other Uses		
Industrial	1,926	4.9%
Community Purposes	1,035	2.6%
Other	-	-

	Square Metres	Proportion of Total
Total Other Floorspace	2,961	7.5%
Vacant	4,945	12.6%
Total floor space	39,268	100.0%
Vacant Land	11,893	-
Remnant Residential (no.)	49	-

Source: CDM Smith, Rockhampton City Council (2021)

In terms of condition, the retail offerings in this precinct were largely of high (48.9% of all retail GFA) and average (41.7% of all retail GFA) quality, whereas the limited commercial offerings were of average quality. Additionally, there was 4,945sqm of vacant tenancies identified in this precinct, with 61.1% in average condition, 21.2% in high condition and 17.8% in poor condition.

Table 4-29 below provides a summary of quality of various types by GFA proportion in the George Street/Gladstone Road specialised centre as at March 2021.

Table 4-29 Quality of Various Types by GFA Proportion, George Street/Gladstone Road, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	9.4%	41.7%	48.9%
Proportion of Total Commercial GFA	31.3%	68.7%	0.0%
Proportion of Total Industrial GFA	23.5%	70.9%	5.7%
Proportion of Total Community GFA	0.0%	72.9%	27.1%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	17.8%	61.1%	21.2%

Source: CDM Smith (2021)

Figure 4-19 outlines the Specialised Centre zoned land along George Street in Rockhampton, in addition to vacant land parcels and the entirely vacant buildings within this centre.

Figure 4-19 Specialised Centre – George Street/Gladstone Road, March 2021



4.2.6.2 Musgrave Street, Rockhampton

Specialised centre zoned land along Musgrave Street provides space for an array of uses, however, the most common use in this precinct is industrial activities.

In total, this precinct has a GFA of 79,648sqm, 28.9% of which is attributable to industrial activity and 17.9% of which is for community purposes. Retail floorspace accounted for 23.3% of the total GFA in the specialised centre zone, with the most significant contribution to retail GFA being dining and take-away food. Additionally, commercial GFA totalled 11,846sqm and accounted for 14.9% of all GFA in the precinct.

Within the specialised centre zoned land, there were 20 vacant land parcels totalling 10,004sqm and a further 68 remnant resident properties. Additionally, there is approximately 11,947sqm of vacant tenancies in the precinct.

Table 4-30 below provides a summary of Musgrave Street specialised centre GFA by use types as at March 2021.

Table 4-30 Gross Floor Area (GFA) by Use, Musgrave Street, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	2,676	3.4%
Dining and take-away food	4,203	5.3%
Clothing, footwear and apparel	1,971	2.5%
Personal and other goods	3,004	3.8%
Core bulky goods	1,054	1.3%
Ancillary bulky goods	2,297	2.9%
Hardware	1,989	2.5%
Take away liquor	1,384	1.7%
Total retail floor space	18,578	23.3%
Commercial		
Financial and insurance services	1,343	1.7%
Rental, hiring and real estate services	802	1.0%
Health care and social assistance	347	0.4%
Professional, scientific and technical services	4,683	5.9%
Administrative and support services	4,671	5.9%
Total commercial floor space	11,846	14.9%
Other		
Industrial	22,996	28.9%
Community Purpose	14,281	17.9%
Other	-	-
Total Other Floorspace	37,277	46.8%
Vacant	11,947	15.0%
Total floor space	79,648	100.0%
Vacant Land	10,004	-

	Square Metres	Proportion of Total
Remnant Residential (no.)	68	-

Source: CDM Smith, Rockhampton City Council (2021)

In terms of condition, the retail offerings in this precinct were largely of an average quality (64.3% of all retail GFA) and high quality (29.6% of all retail GFA) quality. A similar distribution of quality is evident in the commercial GFA of the Musgrave Street specialised centre precinct. Additionally, almost three quarters of all identified vacant tenancies in the precinct were of an average quality.

Table 4-31 below provides a summary of quality of various types by GFA proportion in the Musgrave Street specialised centre as at March 2021.

Table 4-31 Quality of Various Types by GFA Proportion, Musgrave Street, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	6.1%	64.3%	29.6%
Proportion of Total Commercial GFA	4.1%	71.4%	24.6%
Proportion of Total Industrial GFA	5.8%	80.7%	13.4%
Proportion of Total Community GFA	31.8%	59.2%	8.9%
Proportion of Total Other GFA	-	-	-
Proportion of Total Vacant GFA	14.8%	74.6%	10.5%

Source: CDM Smith (2021)

Figure 4-20 outlines the Specialised Centre zoned land along Musgrave Street in Rockhampton, in addition to vacant land parcels and the entirely vacant buildings within this centre.

Figure 4-20 Specialised Centre – Musgrave Street, Rockhampton, March 2021



4.2.6.3 Yaamba Road, Rockhampton

The Yaamba Road specialised centre precinct extends from Park Avenue to Parkhurst in Rockhampton (adjoining Musgrave Road) and provides a mix of retail, commercial, other and vacant floor space, totalling 99,361sqm.

Retail floorspace within this specialised centre totalled 58,503sqm or 58.9% of the total floorspace in the precinct. This was largely driven by the 28.6% of total floorspace attributable to core bulky goods (major tenants include Harvey Norman and Amart Furniture) and the 13.3% driven by hardware retailing (major tenant is Bunnings Warehouse).

The commercial offering in the Yaamba Road precinct totals 2,083sqm and is most significant in the health care and social assistance industry. These tenancies include a discount chemist and the Scotvale Medical centre.

Notably, within the specialised centre zoned land there is a single vacant land parcel totalling 7,000sqm at 398 Yaamba Road, Norman Gardens QLD 4701. Additionally, there is approximately 12,023sqm of vacant tenancies in the precinct and no remnant residential properties were identified.

Table 4-32 below provides a summary of Yaamba Road specialised centre GFA by use as at March 2021.

Table 4-32 Gross Floor Area (GFA) by Use, Yaamba Road, March 2021

	Square Metres	Proportion of Total
Retail		
Groceries and take-home food	2,595	2.6%
Dining and take-away food	609	0.6%
Clothing, footwear and apparel	670	0.7%
Personal and other goods	7,009	7.1%
Core bulky goods	28,417	28.6%
Ancillary bulky goods	5,562	5.6%
Hardware	13,200	13.3%
Take away liquor	441	0.4%
Total retail floor space	58,503	58.9%
Commercial		
Financial and insurance services	-	-
Rental, hiring and real estate services	215	0.2%
Health care and social assistance	1,578	1.6%
Professional, scientific and technical services	290	0.3%
Administrative and support services	-	-
Total commercial floor space	2,083	2.1%
Other		
Industrial	25,187	25.3%
Community Purpose	905	0.9%
Other	660	0.7%
Total Other Floorspace	26,752	26.9%
Vacant	12,023	12.1%
Total floor space	99,361	100.0%

	Square Metres	Proportion of Total
Vacant Land	7,000	-
Remnant Residential (no.)	-	-

Source: CDM Smith, Rockhampton City Council (2021)

In terms of condition, the retail offerings in this precinct were largely of high quality (86.2% of all retail GFA) and average (12.6% of all retail GFA) quality. Whereas 100% of commercial offerings were of high quality. Additionally, of the vacant tenancies GFA identified, approximately 95.2% were deemed to be of a high quality.

Table 4-33 below provides a summary of quality of various types by GFA proportion in the Yaamba Road specialised centre as at March 2021.

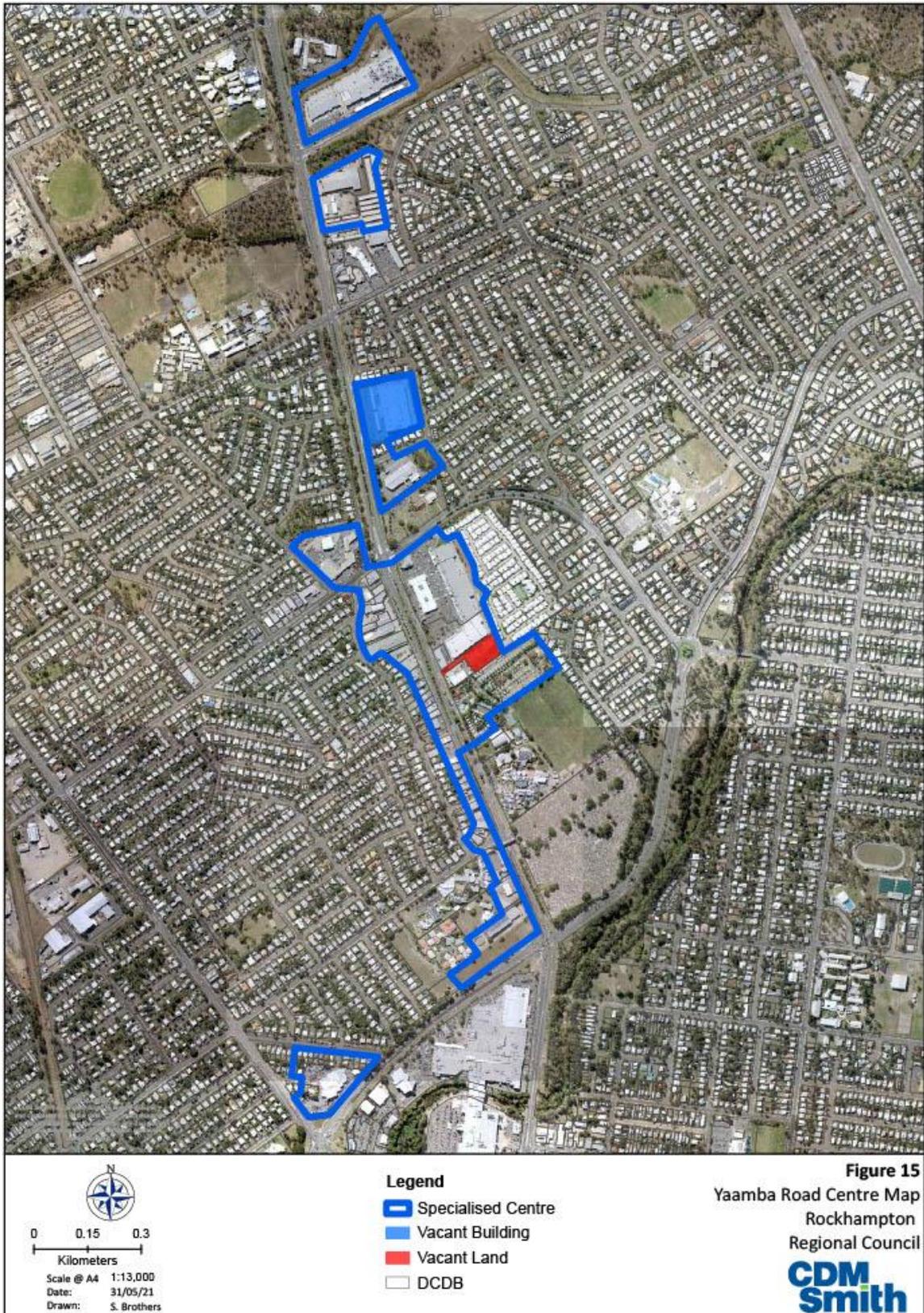
Table 4-33 Quality of Various Types by GFA Proportion, Yaamba Road, March 2021

	Poor	Average	High
Proportion of Total Retail GFA	1.1%	12.6%	86.2%
Proportion of Total Commercial GFA	0.0%	0.0%	100.0%
Proportion of Total Industrial GFA	20.2%	29.6%	50.2%
Proportion of Total Community GFA	0.0%	83.4%	16.6%
Proportion of Total Other GFA	0.0%	0.0%	100.0%
Proportion of Total Vacant GFA	0.0%	4.8%	95.2%

Source: CDM Smith (2021)

Figure 4-21 outlines the Specialised Centre zoned land along Yaamba Road in Rockhampton, in addition to vacant land parcels and the entirely vacant buildings within this centre.

Figure 4-21 Specialised Centre – Yaamba Road, Rockhampton, March 2021



4.2.7 Summary of Findings

4.2.7.1 Vacancy Summary by Centre

Overall, within Rockhampton Regional Council the vacancy rate within the centres network is highest in the Mount Morgan Local Centre, accounting for 16.0% of the total floorspace in the precinct, followed by the Rockhampton CBD (15.6%), which accommodates the largest volume of vacant floorspace within the Rockhampton centres network (43,756sqm). Typically, an overall vacancy rate of 2.5% to 5.0% is considered as “normal” and the result of natural change in tenancies over time. The assessment highlights that several centres within the Rockhampton centres network have vacancy rates significantly higher than benchmark levels.

The vacancy rate of each centre within Rockhampton Regional Council as of March 2021 is detailed in Table 4-34.

Table 4-34 Vacancy Rate by Centre, Rockhampton Regional Council, March 2021

Centre Name	Vacant GFA (sqm)	Vacancy Rate (%)
Principal Centres		
CBD	43,756	15.6%
Major Centres		
Musgrave Street	2,321	2.6%
District Centre		
Gracemere	594	2.8%
Allenstown	744	4.2%
Parkhurst	1,275	12.8%
Local Centre		
Mount Morgan	3,314	16.0%
Norman Gardens	937	14.4%
Frenchville	939	11.7%
Neighbourhood Centre		
Wandal	559	11.0%
Kawana	376	7.7%
Berserker	440	4.9%
Park Avenue	740	12.0%
Specialised Centre		
George Street/Gladstone Road	4,945	12.6%
Musgrave Street	11,947	15.0%
Yaamba Road	12,023	12.1%
Region	84,910	12.2%

Note: Vacancy rates are based on the outcomes of site inspections at a single point in time and may have since changed.
Source: CDM Smith (2021)

The previous commercial centres study (2010) for Rockhampton Regional Council identified the vacancy rates by centre ranging from 2.5% (Allenstown) to 36.4% (Berserker neighbourhood centre). It is noted that the provision of retail floorspace in each centre has changed between 2010 and 2021 with the provision of new stock in Allenstown, Parkhurst, Gracemere and Frenchville and significant expansion of retail floor space within the specialised centre zones.

Increasing vacancy rates are evident across all centres in Rockhampton Regional Council, with the exception of Musgrave Street (0.7% point decrease), Kawana (1.0% point decrease), Berserker (31.5% point decrease) and Park Avenue (6.4% point decrease).

Table 4-35 Comparative Vacancy Rates (%) – Centres in Rockhampton Regional Council, 2010 and 2021

Centre Name	2010 Vacant sqm	2010 Vacancy Rate	2021 Vacant sqm	2021 Vacancy Rate	Change in Vacancy Rate (%)
Principal Centres					
CBD	21,135	8.8%	43,756	15.6%	6.8%
Major Centres					
Musgrave Street	3,435	3.3%	2,321	2.6%	-0.7%
District Centre					
Gracemere	-	-	594	2.8%	-
Allenstown	312	2.5%	744	4.2%	1.6%
Parkhurst	-	-	1,275	12.8%	-
Local Centre					
Mount Morgan	467	10.0%	3,314	16.0%	6.0%
Norman Gardens	275	4.5%	937	14.4%	9.9%
Frenchville	121	2.8%	939	11.8%	9.0%
Neighbourhood Centre					
Wandal	66	2.6%	559	11.0%	8.4%
Kawana	434	8.7%	376	7.7%	-1.0%
Berserker	1,609	36.4%	440	4.9%	-31.5%
Park Avenue	327	18.4%	740	12.0%	-6.4%
Specialised Centre					
George Street/Gladstone Road	256	5.0%	4,945	12.6%	7.6%
Musgrave Street	-	-	11,947	15.0%	-
Yaamba Road	-	-	12,023	12.1%	-
Region	28,437	6.4%	84,910	12.2%	5.7%

Note 1: The Gracemere and Parkhurst district centres were yet to be constructed at the time of the 2010 Commercial Centres study.

Note 2: Vacancy rates are based on the outcomes of site inspections at a single point in time and may have since changed.

Source: Urban Economics (2010) and CDM Smith Analysis (2021)

4.2.7.2 Poor Quality Floorspace

As previously mentioned, each tenancy in Rockhampton Regional Council centre zoned land was rated as either poor, average or high quality based on a number of factors. Of the vacant tenancies in within each centre, the largest proportion of poor quality retail and commercial tenancies were identified in Kawana (70.0% and 73.1% respectively). Additionally, all vacant tenancies in Berserker neighbourhood centre and Norman Gardens Local Centre were identified to be of a poor quality as of March 2021.

Table 4-36 details the proportion of total floorspace attributable as poor quality.

Table 4-36 Proportion of total floorspace attributable to Poor Quality, Rockhampton Regional Council, 2021

Centre Name	% of Retail GFA	% of Commercial GFA	% of Vacant GFA
Principal Centres			
CBD	6,804 (7.6%)	2,262 (2.6%)	3,551 (8.1%)
Major Centres			
Musgrave Street	152 (0.2%)	107 (1.1%)	216 (9.3%)
District Centre			
Gracemere	301 (1.9%)	102 (6.7%)	-
Allenstown	98 (0.7%)	46 (4.6%)	223 (30.0%)
Parkhurst	-	-	-
Local Centre			
Mount Morgan	2,344 (48.1%)	86 (24.0%)	2,782 (83.9%)
Norman Gardens	614 (11.4%)	-	937 (100.0%)
Frenchville	2,035 (32.9%)	532 (42.8%)	360 (42.9%)
Neighbourhood Centre			
Wandal	350 (10.2%)	-	-
Kawana	2,292 (70.4%)	490 (100.0%)	83 (22.1%)
Berserker	760 (14.1%)	212 (37.6%)	440 (100.0%)
Park Avenue	1,123 (21.1%)	-	390 (52.7%)
Specialised Centre			
George Street/Gladstone Road	2,881 (9.4%)	258 (31.3%)	878 (17.8%)
Musgrave Street	1,196 (6.1%)	507 (4.1%)	1,769 (14.8%)
Yaamba Road	697 (1.1%)	-	-

Source: CDM Smith (2021)

4.3 Approved and Proposed Centres

The largest approved development within Rockhampton Regional Council is Gracemere Shoppingworld, where the extension to existing facilities would include a discount department store and specialty retailers. Overall, the expansion would result in a total gross lettable area (GLA) of 16,688sqm at Gracemere Shopping World. Stage 1 of Gracemere Shoppingworld currently is comprised of 6,509sqm of floor space. Meanwhile, Stage 2 of Gracemere Shopping World has been approved for 10,179sqm of floor space. Together, both stages would include approximately:

- 7,660sqm of floor space for a Discount Department Store (DDS);
- 4,123sqm of floor space for a second supermarket;
- 700sqm of floor space for a mini major;
- 135sqm of floor space for a mini major;
- 3,743sqm of floor space for specialty shops; and
- 107sqm for kiosks.

In addition to the four approved centre developments, Rockhampton Regional Council has indicated that there is potential for an extension to the Allenstown Shopping Centre. The expansion would likely occur at 131-137 Derby

Street, Allenstown as these lots have recently been cleared and are within the District Centre zone. The intent for Allenstown could potentially be the development of an additional supermarket with supporting speciality tenancies, but this would be contrary to current planning scheme settings.

The following represents the likely timing of each expansion becoming operational based on application and development stage in addition to application expiration dates:

- Gracemere Shoppingworld: 2024;
- Stockland Rockhampton: 2026; and
- Stockland Rockhampton Restaurant Cinema Precinct: 2026.

Table 4-37 Approved Centres Activity in Rockhampton Regional Council

Name	Details	Total Additional Floorspace (sqm)	New / Expansion / Redevelopment	Date Approved	Building Commencement
Approved Centres					
Gracemere Shoppingworld	Stage 1: <ul style="list-style-type: none"> • Existing Gracemere Shoppingworld totaling 6,509sqm Stage 2: <ul style="list-style-type: none"> • Expansion to the existing facilities totaling 10,179sqm GLA This approval expires August 2024.	10,179	Expansion (only Stage 2)	First approved on 17/08/2010	Stage 1: Complete Stage 2: no commencement of building
Stockland Rockhampton	Proposed Retail Level Plan: <ul style="list-style-type: none"> • Discount Department Store: 2,066sqm GLA • Proposed store: 117sqm GLA 	2,183	Expansion	16/05/2018	No commencement of building
Stockland Rockhampton Restaurant Cinema Precinct	Proposed Plans: <ul style="list-style-type: none"> • Retail expansion of 4,979sqm • Expansion to existing cinemas: 601sqm 	5,580	Expansion / Redevelopment	20/11/2017 (first approval) 29/10/2019 (extension of approval)	No commencement of building
337-341 Yaamba Road, North Rockhampton	A shopping centre complex and service station is approved, with ALDI being a major tenant on this site	1,950	New	02/12/2015 (first approval for reconfiguring a lot) Approval 13/06/2017	No commencement of building

Source: Rockhampton Regional Council (2021)

4.4 Livingstone Shire Centres Network

A high level overview of the Livingstone Shire centres network has been provided, recognising that Livingstone Shire residents are likely to have their convenience and comparison shopping needs at least partially met by the Rockhampton centres network.

The Livingstone Shire Planning Scheme 2018 identifies six centres zones relevant to the commercial study, these being:

- **Major Centre:** the purpose of the major centre zone code is:
 - To identify the desired character and amenity for the zone and to protect it from incompatible development;
 - To provide for the development of the major centre of Yeppoon which is the highest order centre in the planning scheme area; and is a scale that services a large trade catchment in excess of 8,000 households;
 - To provide opportunities for the major centre of Yeppoon to evolve as a lively, mixed-use community hub;
 - Provide for the development of the major centre of Yeppoon as a place comprising the largest range and mixture of uses from within the centre activities group, entertainment activities group and community activities group;
 - To provide for the development of a range and mixture of other uses where they are compatible with preferred uses and they support the needs of the trade catchment area; and
 - To provide for the management of impacts on adjoining sensitive land use;
- **District Centre:** the purpose of the district centre zone code is:
 - To identify the desired character and amenity for the zone and to protect it from incompatible development;
 - To provide for the development of highly accessible district centres which are a scale that services a trade catchment of approximately 5,000 to 8,000 households;
 - To provide for the development of district centres as places comprising a range and mixture of uses from within the centre activities group, entertainment activities group and community activities group;
 - To provide for the development of a range and mixture of other uses where they are compatible with preferred uses and they support the needs of the trade catchment area; and
 - To provide for the management of impacts on adjoining sensitive land use.
- **Local Centre:** The purpose of the local centre zone code is:
 - To identify the desired character and amenity for the zone and to protect it from incompatible development;
 - To provide for the development of highly accessible local centres which are a scale that services a local trade catchment of approximately 3,000 to 5,000 households;
 - To provide for the development of the local centre of Emu Park, which is currently the only local centre in the planning scheme area;
 - To provide for the development of local centres as places comprising a range and mixture of uses from within the centre activities group, entertainment activities group and community activities group; and
 - To provide for the development of a limited range and mixture of other uses where they are compatible with preferred uses and they support the needs of the local trade catchment area.

-
- **Neighbourhood Centre:** the purpose of the neighbourhood centre zone, as per the Livingstone Shire Planning Scheme (2018) is:
 - Provide highly accessible small neighbourhood centres which service a trade catchment of approximately 1,500 households;
 - Neighbourhood centres as places comprising small-scale uses from within the centre activities group (where they serve the convenience needs of the immediate residential area); and
 - To provide for the development of a limited range and mixture of other uses where they are compatible with preferred uses and they support the needs of the immediate residential area.

The centres network in Livingstone Shire is similar to that of Rockhampton Regional Council, however, this local government area does not account for Principal Centres in the planning scheme. As such, Rockhampton Regional Council Principal Centre (Rockhampton CBD) and Specialised Centres (George Street/Gladstone Road, Musgrave Street and Yaamba Road) are the nearest centres to Livingstone Shire for these higher order retailers. Additionally, in Rockhampton Region – East and Glenlee – Rockyview, centres in Parkhurst, Norman Gardens and Kawana also represent proximate retail facilities despite being within the adjoining Rockhampton Local Government Area.

As such, the centres network of Livingstone Shire is of relevance to Rockhampton Regional Council's planning for commercial centres in the future to appropriately account for expenditure inflows and outflows.

4.4.1 Existing Centres

4.4.1.1 Major Centre

Major Centre zoned land within Livingstone Shire is located at proximate to Yeppoon Main Beach within Yeppoon Central Shopping Centre and Keppel Bay Plaza and along James Street. A summary of each retail centre within the Major Centre Zone is as follows:

- Yeppoon Central Shopping Centre is anchored by a Big W and a Woolworths and has a total estimated GFA of 12,716sqm;
- Keppel Bay Plaza is anchored by a Coles and a Target. It is estimated that the total GFA of this shopping centre is in the order of 4,608sqm; and
- Yeppoon CBD: strip retail along James Street is primarily cafés, takeaway food retailers and personal and other goods retailing. In total it is estimated that there is approximately 10,162sqm of retail floorspace within Yeppoon CBD.

4.4.1.2 Local Centre

Local Centre zoned land within Livingstone Shire is primarily in Emu Park, on the south-eastern perimeter of the local government area. This centre is largely strip retail with takeaway food, hardware, personal and other goods retailers, tourist accommodation, a service station and a Supa IGA (most significant tenant). In total, it is estimated the Local Centre at Emu Park has a GFA in the order of 4,554sqm.

4.4.2 Neighbourhood Centre

Neighbourhood Centre zoned land within Livingstone Shire Council is located at Taranganba, within the Cedar Park Shopping Centre. This centre totals 1,500sqm and the two most significant tenancies are the SPAR and the Start Liquor.

4.4.3 Approved and Proposed Centres

An overview of approved, refused and pending development applications for retail activities within Livingstone Shire Council found that there are no outstanding development applications for retail uses, however, there are 9 approved applications yet to begin construction. The largest of these approved applications is the Bunnings Warehouse at 3571 Yeppoon Road, Yeppoon, which is going to have a total GFA of 9,701sqm once completed. Overall, these nine approved development applications have a total retail GFA of 12,572.7sqm.

Table 4-38 Approved Centres in Livingstone Shire Council

Application Number	Status	Address	Description	Additional Retail Floorspace (sqm)	Within Existing Centre Zoned Land
D-243-2019	Approved	12 Anzac Parade, Yeppoon QLD 4703	Multiple dwelling units (forty-five units), Retail Area (750sqm and 200sqm)	950	Yes – Major Centre
D-77-2020	Approved	3571 Yeppoon Road, Yeppoon QLD 4703	Bunnings Warehouse and Food and Drink Outlet and Operational Works	9,701	Yes – Specialised Centre
D-2-2019	Approved	Lot 74 Anzac Parade, Yeppoon QLD 4703	Food and drink outlet (Restaurant) and Function facility	-	No – Open Space
D-138-2018	Approved	66 Farnborough Road, Meikleville Hill QLD 4703	Food and drink outlet (Cafe)	117	No – Low Medium Density Residential
D-58-2018	Approved	99 Matthew Flinders Drive, Cooee Bay QLD 4703	Take-away food store	46.7	No – Low Medium Density Residential
D-147-2017	Approved	14 Normanby Street, Yeppoon QLD 4703	Restaurant	-	Yes – Major Centre
D-119-2016	Approved	Lot 35 Farnborough Road, Farnborough QLD 4703	Adult product shop (bottle shop), Convenience restaurant, Restaurant, Take-away food store, Child care centre, Shop, Indoor sports facility, Medical centre, Service station	1,551	No – Emerging Communities
D-97-2016	Approved	15 Normanby St, Yeppoon QLD 4703	Restaurant	-	Yes – Major Centre
D-210-2015	Approved	2-4 Hoskyn Drive, Hidden Valley QLD 4703	Service station	207	Yes – Specialised Centre
Total Approved	-	-	-	12,572.7	-

Note: Where the column is blank there is no publicly available information.

Source: Livingstone Shire Council Development Application Enquiry (2021)

Section 5 Trends and Implications for Centre Provision

This task will consider recent trends which have already, or are likely to influence centres provision within Rockhampton Regional Council over the projection horizon, including but not limited to:

- Shift to online retail and the consequent impact on retail floor space provision within regional centres such as Rockhampton;
- New forms of activity, such as craft breweries, distilleries and artisan producers and shifts towards new forms of centre-based dining, entertainment and lifestyle experience which can often challenge traditional land use definitions and regulatory approaches;
- COVID-19 impacts on retail floor space provision (e.g. it is understood that a number of stores have permanently closed due to the impacts of COVID-19 in 2020), and whether these impacts are likely to be short term or sustained in the longer term;
- COVID-19 impacts on commercial office floor space provision (e.g. has working from home reduced the demand for traditional commercial office floor space in the CBD) and whether these impacts are likely to be short term or be sustained in the longer term; and
- COVID-19 impacts on perceptions relating to residential built form, particularly within the medium/high density residential segment.

5.1 Shifts to Online Retail

Online retailing is defined as industry retailers operating websites which enable consumers to purchase a range of products such as apparel, computers, recorded music, electronic goods, general merchandise and groceries. As a result of changing consumer attitudes and the mass adoption of in-home technologies over the past decade, online retailing has significantly grown throughout Australia, a trend which has only been furthered by the stay at home orders in response to COVID-19.

Some key industry performance indicators which detail the significance of online retailing in Australia were outlined in IBIS World's Online Shopping in Australia report (Report X0004), 2020 and are as follows:

- Total revenue: \$34.5 billion in 2020;
- The average annual growth in revenue: 13.6% per annum between 2016 and 2021; and
- The average annual growth in the number of businesses: 12.6% per annum between 2016 and 2021.

As a result of COVID-19 non-essential physical stores have closed temporarily (and some permanently) across the country and consumer preferences have been forced to shift from brick and mortar stores to online shopping, particularly for the purchase of discretionary goods (Bartholomeusz, 2020). A report published by KPMG titled COVID-19: Retail's Survival and Revival in April, 2020, identified that eCommerce will play a vital part of retailers response to the crisis and will cause lasting changes in consumer behaviour throughout Australia. The report identifies two-waves of significant eCommerce growth resulting from the pandemic;

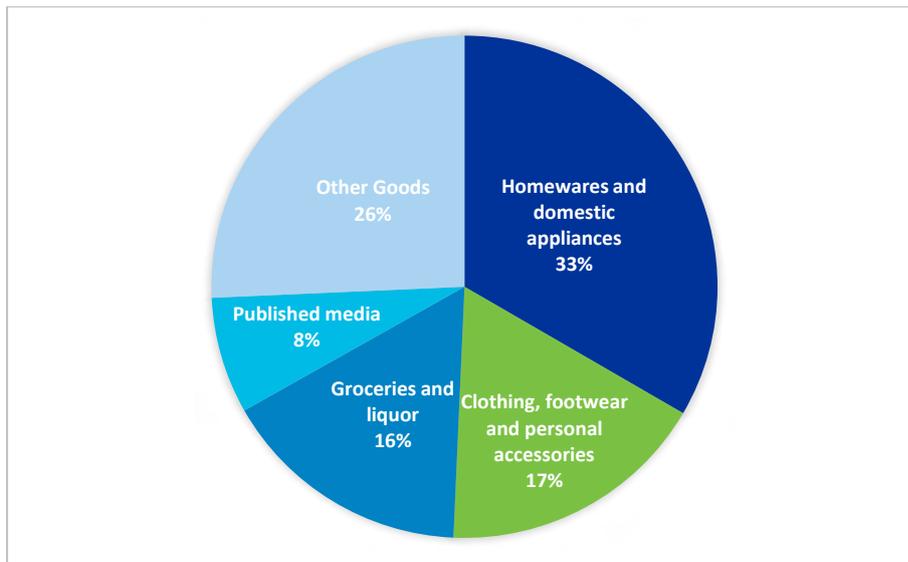
- The shock switch from physical to online channels as a result of public space shutdowns; and
- Regrowth starts and sticks online, due to permanent changes in shopping behaviour.

In Australia, the market share concentration of the industry is considered low, meaning that the largest operators in the market hold less than 50% of the market share (combined). As of 2020, the largest market share was held by Westfarmers Limited (6.5% market share) and Woolworths Group Limited (9.0% market share). It is anticipated that both Westfarmers and Woolworths Group Limited will record significant growth in the 2020-21 financial year due to

the COVID-19 pandemic, which has strongly increased the demand for online groceries and other domestic necessities.

The segmentation of online sales (both products and services) detailed in Figure 5-1 below, outlines that four expenditure categories accounted for almost three quarters of all online transactions in 2020. Interestingly, homewares and domestic appliances was the most significant of the four. The 2020 eCommerce Industry Report published by Australia Post (2020) detailed that across all home and garden product online sales, the homewares and domestic appliances category grew the most significantly in Victoria during 2020. Notably, Victoria also experienced the longest stay at home order than anywhere else in Australia during 2020.

Figure 5-1 Industry Products and Services in Australia, 2020



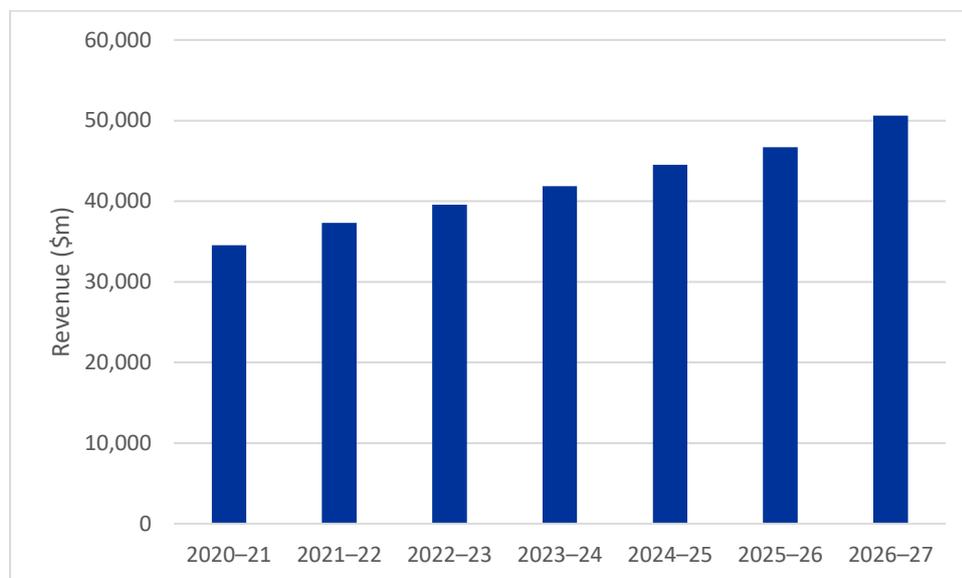
Source: IBIS World, Online Shopping in Australia (2020)

There are five key external driving factors which have been identified as contributing significantly to the online growth in the above detailed sectors, both to date and moving forward. The key driving factors are as follows (IBIS World, 2020):

- Internet Subscribers: the number of internet subscribers is expected to increase in 2020-21, creating an opportunity for online retailers to increase sales;
- Real Household Discretionary Income: real household discretionary income is expected to decrease in 2020-21, threatening industry growth;
- Consumer Sentiment Index: consumer sentiment is expected to rise but remain negative in 2020-21;
- Demand from Department Store: demand from department stores is expected to decrease in 2020-21; and
- Mobile Telecommunications Density: mobile telecommunications density is expected to increase in 2020-21.

The acceleration of online activity and mobile telecommunications density are the most significant driving factors in online retail growth beyond 2020. IBISWorld industry projections (2020) indicate that revenue in the online retail industry will increase from \$34,530 million in 2020-21 to \$50,620 million by 2026,27, representing a slower average annual growth rate of approximately 5.6% per annum when compared to historic growth over the past 5 years.

Figure 5-2 Estimated Industry Revenue – Online Retail in Australia, 2020-21 to 2026-27



Source: IBIS World, Online Shopping in Australia (2020)

There are noteworthy consequences which arise as a result of the continued growth in online shopping (particularly over the next decade). Bricks and mortar retailers are faced with competing against virtual stores with none of the retail overheads, while simultaneously bricks and mortar retailers are developing their own virtual stores that compete against their own shops. Companies such as Uber Eats and Menulog have demonstrated that there are few products which cannot be fulfilled through technological advancements and online platforms utilised by the consumer. Anecdotal evidence indicates that there was considerable take-up of food delivery services in Rockhampton since COVID-19. The table below outlines the dimensions of selected product types that might facilitate or impeded online fulfilment.

Table 5-1 Product Criteria which Facilitate or Impede Online Fulfillment

Product	Perishable	Purchase Frequency	Price to Weight Ratio	Type of Purchase	Repeat Inspection Required	Online
Fresh Food	Yes	Regular & Frequent	Low	Convenience	Yes	High
Packaged Groceries	No	Regular & Frequent	Low	Convenience	No	Low
Apparel & Accessories	No	Category-Frequent Item – infrequent	High	Comparison	Yes	Medium
CD/DVD	No	Category – Frequent	High	Comparison	No	Low
Books	No	Item – infrequent	High	Comparison	No	Low
Cosmetic & Personal Items	No	Regular & Occasional	Very High	Comparison	No	Low

Source: CDM Smith Assessment (2021)

Notably, technology and online retail has significantly changed the landscape of entertainment. For example, subscription based streaming services such as Spotify and Netflix have essentially eliminated the need for physical stores with the core business being CD and DVD retailing. So, whilst these products historically would have been ideal for online fulfillment as they are highly uniform, online platforms have entirely replaced the need for purchasing the physical item.

Online retailing is already changing how retail developments are delivered, with centres moving away from their traditional retail focus towards more lifestyle-oriented centres. Online retailing will and already is having substantial impacts on retailers that have traditionally relied on large format stores (e.g. supermarkets, discount department stores, department stores, category killers). The ultimate consequence will be an overall reduction in the demand for physical retail floor space per capita, it remains to be seen whether this will result in fewer or smaller stores, this is a trend which has been furthered by the COVID-19 pandemic.

Use of dark stores both during and post-COVID

National comparison – still relatively low penetration compared to other countries – UK, China etc

Opportunities and not just threats?

5.1.1 Implications for Rockhampton City

Rockhampton City is classified as inner regional Australia under the ABS remoteness area boundaries and according to Australia Post (2020) inner regional Australia recorded growth in online shopping in excess of 10.0% per annum over the past two years as detailed in Figure 5-3 below.

Figure 5-3 Growth in Online Shopping by Remoteness Area – Australia, 2019 to April 2020



Source: Australia Post (2020)

The availability and affordability of technology is expected to continue to positively influence the incidence of online shopping across Australia, particularly in regional areas which may have previously been limited by distribution channels or access to technologies. For regional cities, such as Rockhampton, the growth in online retailing will continue to be a deterrent for large format retailers (bulky goods) considering entering the region as promoting online shopping in these areas brings fewer overheads and a broader market. Large format retail space will, in turn, become increasingly unnecessary.

The tenancies which previously had housed large format retailers in Rockhampton City will therefore need to be repurposed. Indoor recreation facilities (such as laser tag, indoor playgrounds and indoor trampoline facilities) are typically situated alongside retail or industrial uses as they require a large floorspace (over 2,000sqm) which is well connected and accessible. Such facilities typically also have a café area inside as a place for parents to wait. Whilst the concept of indoor recreation facilities is relatively new to regional Queensland, South East Queensland (SEQ) has many of these facilities located in or proximate to bulky goods retailers and other retail uses.

Indoor recreational uses include laser tag, indoor playgrounds and indoor trampoline facilities. The concept of such facilities is relatively young in regional Queensland. As such, these types of facilities have been located alongside industrial and retail uses.

Around Australia there has also been a shift towards online shopping for both fresh food and packaged groceries, which places a question on the necessity of additional physical supermarkets in a given region. However, Rockhampton, and other regional cities across Australia, are unlikely to see a significant shift from physical supermarkets to online channels. This is largely due to three main factors:

- Patterns of behaviour: oftentimes in regional communities making a trip to the local supermarket can also provide an avenue for socialisation as properties outside of the inner city are isolated;
- Perishability and time: the distance between deliveries for supermarket online orders is significantly further than in metropolitan areas. As such the delivery of perishable goods could be compromised; and
- Time-frame: the population and distribution of Rockhampton is not such that supermarkets could feasibly offer same day delivery. Therefore, making a trip to the shops is often a more efficient option. Dark stores/fulfilment centres?

Although Rockhampton City is unlikely to see a significant shift towards online retailing within the supermarket sector in the near term, the fulfillment of online orders through brick-and-mortar stores is expected to continue. Services such as click and collect allow the convenience of online shopping, however, combat the three barriers to online fulfillment detailed above.

5.2 New Activities

5.2.1 Changes to Consumer Preferences and Expectations

New forms of activities such as breweries, distilleries, and artisan producers have had increasing popularity among Australians over the past decade. The boom in micro-breweries has seen the number of facilities increase to 526 businesses by 2020, with an average annual growth rate of 12.0% per annum between 2016 and 2016 (IBISWorld, 2020). A similar trend is evidenced in the emergence in the popularity of distilleries, however, this is a younger industry in the Queensland context.

These activities typically locate in industrial or rurally zoned land due to the manufacturing aspect of the business. However, onsite bars, dining and take-away liquor sales have historically made it difficult to find appropriately zoned land which is appealing to consumers. An example of the challenges to land use definitions was evident in 2018 when the New South Wales government amended its retail land use definitions to establish brewing as an artisan industry. Whilst this was beneficial in some respects, the classification meant that microbreweries were no longer permitted on rurally zoned land which inadvertently restricts the industry further (Burnett, 2019).

The Queensland Craft Brewing Strategy details that the planning scheme plays an important role in supporting the growth of the industry (The Department of State Development, Manufacturing, Infrastructure and Planning, 2018). Craft brewing is not a defined term in the Planning Regulation 2017. To assist the industry in determining how a craft brewery is to be defined for the purposes of development, the local governments could identify that use as an example of an appropriate activity in given zones.

In recent times, consumers have also been increasingly drawn to purchasing fresh locally sourced produce, as evidenced by the success of the Farmers Markets (held in various Brisbane locations) and artisan products. Coles and Woolworths have responded to this trend by actively promoting their fresh food focus. Woolworths have made their in-store butchers and bakers more visible to shoppers in a number of stores, suggesting to customers that their product is essentially prepared locally and on-site. The layout of the fresh produce section in both Coles and Woolworths has also been altered to provide a 'market' feel.

The ongoing shift towards online shopping (as discussed in the preceding section) also applies pressure to major centres to pivot towards becoming a 'lifestyle' centre in order to draw customers and remain competitive in the digital age. Lifestyle centres include entertainment, leisure and retail spaces all within the centre, in the aim of becoming a destination rather than the historic dependency of convenience retail. These changes in consumer preferences have also led to a shift in consumer expectations when dining out. For example, centre facilities have been pressured to increase the quality and quantity of dining options, with many Queensland centres establishing courtyard dining precincts which provide the surrounding suburbs with an alternative to travelling closer to the CBD for a niche dining experience. These dining precincts further the centre as a lifestyle destination.

5.2.2 Implications for Rockhampton City

The popularity of micro-breweries, distilleries and artisanal production is anticipated to continue, and regional Queensland may provide opportunities for manufacturers to reduce overheads and diversify their consumer market. For Rockhampton City the main considerations when planning for future commercial and retail space is to ensure flexibility in activity definitions in the planning scheme in order to reduce the barriers to entry for new producers to ensure where appropriate, these uses can establish within centres zones. The development of Rookwood Weir will provide water security for the region and is anticipated to increase agricultural production and hence local produce available for purchase, that could be sold at local markets.

Additionally, encouraging commercial centres to transition to lifestyle centres will also be integral in building resilience in the retail sector against online shopping prevalence.

5.3 COVID-19 Implications

5.3.1 Retail Floorspace

As both the types of retail shoppers and shopping trips have evolved over time, the retail industry has adjusted to meet the ever-changing needs of consumers. Evolving trends have highlighted the need for centres strategies and planning schemes to be designed in order to accommodate the diverse and evolving nature of retailing. Recent trends in retail development include the following:

- **Bulky goods retailing:** these large format stores were gaining momentum in the early to mid 2000s as it reduces overheads and allowed for increases in the offering of the store (JB Hi-Fi is an example of this). However, online shopping has deterred this shift as more bulk goods can be purchased online. Increases in technology have also reduced the cost incurred in freight and logistics networks making door to door delivery feasible for businesses and more convenient for consumers (a trend particularly evident in regional Queensland);
- **Factory outlets:** these outlets rely on lower prices and the cumulative attraction of an agglomeration of tenants to generate consumer interest and ultimately shopper trips. With Australia's small population base, factory outlet centres might well be limited to a small number in capital city and major provincial areas;
- **Fresh food focus:** consumers have been increasingly drawn to purchasing fresh locally sourced produce, as evidenced by the success of farmers markets, such as the Rocklea Markets in Brisbane. Coles and Woolworths have responded to this trend by actively promoting their fresh food focus and adopting in-store butchers and bakers; and

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- Convenience retail: increasingly time-poor consumers are demanding quick, convenient access to chore activities such as food and grocery shopping, with shoppers shopping more often for a smaller basket of goods. Supermarkets have responded with extended trading hours, store and centre layout designs aimed at amplifying convenience, and incorporating meal solutions.

Whilst these trends have historically been significant factor to consider in land use planning, COVID-19 has altered the retail landscape in Australia and across the world. Retail expenditure considerably decreased with high unemployment and a resulting decrease in discretionary spending. ABS Retail Trade data indicates retail spending has showed signs of a recovery after restrictions begun to ease in May and June, with increased spending within the electrical and electronic goods and household goods retail subcategory most pronounced. Spending at cafes, restaurants and catering services has also recovered to pre COVID-19 levels as of late 2020. Customer visitation to large shopping centres, such as Westfield centres, has recovered from the low experienced in March and April, and remained below pre COVID-19 levels for an extended period (Scentre Group, 2020), but had recovered to pre COVID-19 levels by late 2020. Although Westfield Centres continue to operate, not all centre tenants are trading at full capacity. The restrictions induced by COVID-19 has resulted in the permanent closure of some retail chains, with many unable to continue to afford rent (The Australian Financial Review, 2020). Smaller, agile retail businesses will bounce back faster than larger national chains, unencumbered of long supply lines and large fleets of stores.

Online shopping popularity means that physical stores do not require as much space for sales, however, warehousing and distribution space is in high demand, particularly in metropolitan centres. Some retailers are turning parts of their stores into fulfillment centres, but those that will continue as traditional stores will not need as much space. Smaller square footage can also help brands cut costs during economic uncertainty (Morgan, 2020). PWC's report 'Where next for retail and consumer?' was published in 2020 and suggests that a potential response to COVID-19 and the sustained behavioural shift towards online shopping, retailers should evaluate the viability of the existing store footprint for the future of the store (PricewaterhouseCoopers, 2020).

With respect to short, medium and long term implications of COVID-19 on retail floorspace demand, PWC (2020) explains the following horizon of implications:

- Short to medium-term: strict social distancing rules leading to spikes in online retail and consumer focus on non-discretionary spending will cause a significant decrease in the demand for retail floorspace; and
- Long term: sustained behavioural shift of consumers to online retail, changes in product/pricing expectations and continued industry consolidation will lead to a sustained reduction for large floorplates of retail space.

As the retail industry moves away from large format stores, there has been observed increase in footfall in local stores and neighbourhood shopping precincts. This trend is likely to reduce over time as movement restrictions are eased, however, some of this change is likely to remain in the long run driven by sustained behavioural changes and local shopping precincts becoming increasingly competitive (KPMG, 2020). Therefore, it is likely that smaller neighbourhood centric retail space will be in higher demand than space in large format major centres.

5.3.2 Commercial Floorspace

Historically, a number of trends in the commercial office market were observed, including:

- Preference for CBD Location: Central business districts offer a large range of often prestige office space, access to amenities and services for both employers and employees and access to high standard public transport. At present the Rockhampton CBD has limited public transport options with amenities and services dispersed throughout the centres network, so does not offer the same advantages relative to a thriving CBD in a metropolitan city;
- Other locational requirements: In an increasingly tight labour market, the needs and expectations of employees become increasingly significant in the locational decisions of businesses. Factors considered particularly important include access to public transport and dining/takeaway food options for staff. Presently, the

Rockhampton CBD, whilst offering dining and takeaway food options, does not offer significant benefits relative to other locations within the centres network such as Stockland Rockhampton (which is somewhat limited to provide additional commercial office space);

- Campus style accommodation: Large floor plate, low rise commercial office buildings have been developed in recent years to provide lower cost office accommodation in city fringe locations. An example of campus style accommodation office provision in the metropolitan context is Brisbane Technology Park at Eight Mile Plains. Other facilities typically provided in campus style accommodation include relatively generous carparking provision and a range of dining/takeaway food options. Campus style accommodation is typically unsuitable in dense high cost CBD locations due to its low floor space yield (i.e. it is land extensive). However, in the Rockhampton context, the provision of large floor plate, low rise commercial office buildings could occur, but is likely limited to some extent by the projected size of the commercial office workforce and the requirements of businesses;
- Co-location of business activity: In an effort to streamline business operation, there has been an increasing trend to co-locate office, warehouse/manufacturing and distribution activities in the one location. This has generated increased demand for office space in low impact industrial precincts such as North Lakes Business Park, which accommodates a mix of commercial office and industrial tenants; and
- Changing floor plate sizes: Demand for floor space per person in Australia increased from approximately 14sqm per person in the 1970s to 20sqm per person in the 1990s. The provision of commercial office space per person in high cost CBD locations is typically less generous than in suburban and regional markets.

Despite these historic trends in the commercial office industry, COVID-19 has significantly disrupted the industry. During COVID-19, the majority of the country's office-based workforce pivoted to remote working. For many Australians, the option to work remotely 1-2 days per week has become a preference to consider in employers.

As of the 2016 Census, approximately 4.7% of the working population of Australia worked from home, however, in 2019 (prior to COVID-19) it was estimated that 15.0% of employees had the option to work remotely (Knight, 2020). The changes to traditional work arrangements which have been imposed due to the pandemic have meant that almost a third of the Australian workforce have been working from home since the inception of restrictions (Roy Morgan, 2020). A report published by Global Workplace Analytics (2020) indicates that as a result of the pandemic approximately 25.0% to 30.0% of the workforce will be working from home multiple days a week by the end of 2021.

Increasing incidences of remote working reduces the demand for traditional commercial floorspace as it is unlikely that the capacity of the office will need to host the entire workforce at one time. In the medium to long-run, commercial spaces will need to be increasingly flexible, both in terms of scale and lease lengths (JLL, 2020).

JLL (USA) anticipates flexible commercial space will exceed demand growth for traditional commercial spaces. As such, prospective tenants will expect the following amenities from property managers/landlords (JLL, 2020):

- Pre-built/fit out spaces;
- Lease flexibility; and
- Smaller satellite style offices in suburbs to reduce commuting.

Additionally, JLL (2020) estimates that the increase in flexible workspace will lead to 30.0% of all office space being consumed flexibly by 2031.

5.3.3 Residential Preferences

The short-term lifestyle changes which have been imposed as a result of the COVID-19 pandemic are anticipated to have lasting changes on the expectations for the design quality and flexibility of houses. One of the most significant changes to lifestyle has been the widespread adoption of work from home practices. As previously detailed, COVID-19 work from home orders are anticipated to cause a sustained shift in consumer preferences towards flexibility in

remote working. It is anticipated that approximately 25.0% to 30.0% of the workforce will be working from home multiple days a week by the end of 2021.

The dramatic increase in the proportion of the workforce likely to work from home will inevitably shift the preferences of in house features as more value will be placed on the arrangement of the workplace at home. It is likely that spatial organisation will change, with the necessity of a home office transitioning from a small area to a separate room with large windows, blackout curtains and comfortable furniture. This space will also be technically equipped and sound insulated (Makhna, 2020).

A potential outcome could be a decrease in the demand for high-rise apartments. Generally, high-rise buildings have not placed health and hygiene at the forefront of design (Makhna, 2020). This can make it more difficult for residents living in high rise buildings to follow health guidelines by avoiding contact with elevator, elevator buttons, door handles, surfaces and neighbours. Already, this has prompted developers to investigate how to better design high density residential projects, and to identify new materials that limit transmission of virus and bacteria and technology that better assists residents in following public health guidance.

Social distancing and self-isolation practices will also have an impact on the configuration of houses in the future. In the wake of COVID-19, when looking at new residences, people will quickly imagine what it would be like to isolate with their household for months at a time within the space. The need for private space in a confined environment will become increasingly important and therefore there is an anticipated shift away from open plan houses towards more separable spaces in the home. Bedrooms will be spaced apart to increase acoustic buffering for residents working from home (Chayka, 2020).

Additionally, mandated self-isolation in high density apartments, above ground floor with limited to no outdoor space, will encourage residents to seek accommodation where there is private outdoor space (e.g. a courtyard or terrace). This could facilitate a rebalancing of preferences more towards semi-detached and detached dwellings, as well as compel developers of high density apartments to improve access to outdoor areas or improve natural ventilation.

5.3.4 Implications for Rockhampton

Land use planning for Rockhampton City will therefore need to consider the ongoing future implications of COVID-19. A common theme among the impacts to retail, commercial and residential floorspace demand is that sustained behavioural shifts in consumer/worker preferences are likely to remain after the immediate effects of the global pandemic have subsided. The most significant medium to long term implications for Rockhampton City are as follows:

- Retail floorspace: the provision for large format retail footprints in centres should decrease in the future, with a stronger focus on smaller tenancies with a neighbourhood focus;
- Commercial floorspace: the provision for commercial space should pivot from permanent offices (e.g. a traditional five-year lease) towards commercial buildings which are highly flexible in terms of capacity, lease periods and configurations; and
- Residential Preferences: residents of medium/high density dwellings will expect some private outdoor space, separated office spaces, good acoustic buffering, and the ability to separate from other persons residing within the dwelling.

Section 6 Retail Floor Space Demand Assessment

This section of the report provides an assessment of the demand for additional retail floor space within the Rockhampton centres network to 2041, through consideration of projected household expenditure patterns at a catchment level, converted to supportable floor space estimates (after adjusting for net inflows/outflows of retail expenditure).

6.1 Retail Expenditure

Retail expenditure patterns are estimated based on the CDM Smith retail expenditure model which generates small area retail expenditure estimates based on a simulation utilising a range of small area demographic data sourced from the Census and ATO; regional level data from the ABS Household Expenditure Survey; and broader state and national level data from state and national accounts.

Expenditure categories relevant to retail and commercial centres in Rockhampton City are as follows:

- Groceries & take home food;
- Dining & take away food;
- Clothing, footwear & apparel;
- Personal & other goods;
- Core bulky goods;
- Ancillary bulky goods;
- Hardware; and
- Takeaway liquor.

Detailed retail expenditure estimates pertaining to these categories are listed in Appendix B. Summary tables included throughout this section include the following categories:

- Total grocery and specialty;
 - Groceries & take home food;
 - Dining & take away food;
 - Clothing, footwear & apparel;
 - Personal & other goods;
 - Takeaway liquor;
- Total bulky goods;
 - Core bulky goods;
 - Ancillary bulky goods; and
 - Hardware.

Based on the provision of retail floorspace in Livingstone Shire Council and the proximity of residents of the council areas to major retail precincts in Rockhampton Regional Council, it is likely that retail and commercial centres in Rockhampton also support a significant proportion of residents in Livingstone.

Typically this support would be in comparison retail categories, such as clothing, footwear and apparel and bulky goods. In addition, the population of Glenlee-Rockyview is likely to utilise supermarket provision within North Rockhampton as opposed to supermarkets within Yeppoon.

As such, the retail expenditure assessment has also considered retail expenditure trends within Livingstone Shire.

6.1.1 Retail Expenditure

6.1.1.1 Weekly Household Retail Expenditure

Weekly household retail expenditure estimates are presented in 2020 dollars and assume real expenditure growth of 1.0% per annum, as per standard industry practice.

Average weekly household expenditure for each catchment area is anticipated increase as follows:

- **Rockhampton North:** estimated to increase from \$606.88 per week in 2020 to \$747.92 by 2041;
- **Rockhampton South:** anticipated to grow from \$621.93 per week to \$766.46 per week between 2020 and 2041;
- **Mount Morgan:** average weekly retail expenditure is estimated to increase from \$563.32 to \$694.23 per week over the projection period;
- **Gracemere:** estimated increase from \$602.25 per week to \$742.21 per week between 2020 and 2041;
- **Bouldercombe:** anticipated to grow from \$601.34 to \$741.09 per week between 2020 and 2041;
- **Rockhampton Region – West:** average weekly retail expenditure is estimated to increase from \$649.14 per week in 2020 to \$800.00 per week in 2041;
- **Rockhampton Region - East:** estimated to increase from \$596.61 per week in 2020 to \$735.26 by 2041;
- **Glenlee - Rockyview:** anticipated to grow from \$757.95 per week to \$934.09 per week between 2020 and 2041;
- **Livingstone Coastal Communities:** average weekly retail expenditure is estimated to increase from \$599.02 to \$738.23 per week over the projection period; and
- **Livingstone Shire Balance:** estimated increase from \$602.46 per week to \$742.47 per week between 2020 and 2041.

Although Rockhampton Region – East, Glenlee – Rockyview, Livingstone Coastal Communities and Livingstone Shire Balance are not within the Rockhampton Regional Council area, they are of significance when considering retail expenditure in the area, particularly within comparison retail categories. Additionally, residents within Glenlee-Rockyview primarily utilise supermarket facilities within Rockhampton City Council, as these represent the most proximate opportunities.

Typically, expenditure leakage from Livingstone Shire Council would be in comparison retail expenditure categories accessible at higher-order retail centres (e.g. Stockland Rockhampton).

Table 6-1 reports the average weekly household retail expenditure for each catchment between 2020 and 2041. A detailed summary of the estimated average weekly household expenditure by retail category and catchment is provided in Appendix B, Table B-1.

Table 6-1 Average weekly household expenditure (\$ per household, 2020 dollars) by Catchment Area, 2020 to 2041

	2020	2021	2026	2031	2036	2041
Rockhampton North						
Total Grocery & Specialty	\$489.21	\$494.10	\$519.30	\$545.79	\$573.63	\$602.89

	2020	2021	2026	2031	2036	2041
Total Bulky Goods	\$117.68	\$118.85	\$124.92	\$131.29	\$137.98	\$145.02
Total	\$606.88	\$612.95	\$644.22	\$677.08	\$711.62	\$747.92
Rockhampton South						
Total Grocery & Specialty	\$502.24	\$507.26	\$533.14	\$560.33	\$588.91	\$618.95
Total Bulky Goods	\$119.69	\$120.89	\$127.05	\$133.53	\$140.35	\$147.51
Total	\$621.93	\$628.15	\$660.19	\$693.87	\$729.26	\$766.46
Mount Morgan						
Total Grocery & Specialty	\$458.43	\$463.01	\$486.63	\$511.45	\$537.54	\$564.96
Total Bulky Goods	\$104.89	\$105.94	\$111.35	\$117.03	\$123.00	\$129.27
Total	\$563.32	\$568.95	\$597.98	\$628.48	\$660.54	\$694.23
Gracemere						
Total Grocery & Specialty	\$485.78	\$490.64	\$515.67	\$541.97	\$569.62	\$598.67
Total Bulky Goods	\$116.47	\$117.63	\$123.63	\$129.94	\$136.57	\$143.53
Total	\$602.25	\$608.27	\$639.30	\$671.91	\$706.18	\$742.21
Bouldercombe						
Total Grocery & Specialty	\$485.14	\$489.99	\$514.99	\$541.26	\$568.87	\$597.89
Total Bulky Goods	\$116.20	\$117.36	\$123.35	\$129.64	\$136.25	\$143.20
Total	\$601.34	\$607.35	\$638.34	\$670.90	\$705.12	\$741.09
Rockhampton Region - West						
Total Grocery & Specialty	\$525.81	\$531.07	\$558.16	\$586.63	\$616.56	\$648.01
Total Bulky Goods	\$123.33	\$124.57	\$130.92	\$137.60	\$144.62	\$152.00
Total	\$649.14	\$655.64	\$689.08	\$724.23	\$761.17	\$800.00
Rockhampton Region - East						
Total Grocery & Specialty	\$481.82	\$486.64	\$511.46	\$537.55	\$564.97	\$593.79
Total Bulky Goods	\$114.79	\$115.94	\$121.86	\$128.07	\$134.60	\$141.47
Total	\$596.61	\$602.58	\$633.32	\$665.62	\$699.58	\$735.26
Glenlee - Rockyview						
Total Grocery & Specialty	\$620.05	\$626.25	\$658.20	\$691.77	\$727.06	\$764.15
Total Bulky Goods	\$137.90	\$139.28	\$146.38	\$153.85	\$161.69	\$169.94
Total	\$757.95	\$765.53	\$804.58	\$845.62	\$888.75	\$934.09
Livingstone Coastal Communities						
Total Grocery & Specialty	\$483.51	\$488.35	\$513.26	\$539.44	\$566.96	\$595.88
Total Bulky Goods	\$115.51	\$116.66	\$122.61	\$128.87	\$135.44	\$142.35
Total	\$599.02	\$605.01	\$635.87	\$668.31	\$702.40	\$738.23
Livingstone Shire Balance						
Total Grocery & Specialty	\$485.38	\$490.23	\$515.24	\$541.52	\$569.14	\$598.17
Total Bulky Goods	\$117.08	\$118.26	\$124.29	\$130.63	\$137.29	\$144.29

	2020	2021	2026	2031	2036	2041
Total	\$602.46	\$608.48	\$639.52	\$672.15	\$706.43	\$742.47

Source: Derived from ABS (2016) Retail Trade publication and ABS (2017) Household Expenditure Survey

6.1.1.2 Annual Available Retail Expenditure

To convert average weekly household estimates to annual available expenditure estimates, the assessment has utilised the household projections reported in Section 2.3. Extrapolating the average annual weekly expenditure per household in each area to be an annual figure, then multiplying this value by the number of households per catchment yields a total annual available expenditure by catchment over the projection horizon.

Annual available retail expenditure within each catchment area is anticipated to increase as follows:

- **Rockhampton North:** estimated to increase from \$540.64 million in 2020 to \$827.12 million in 2041;
- **Rockhampton South:** anticipated to grow from \$221.74 million to \$277.64 million between 2020 and 2041;
- **Mount Morgan:** expected to increase to \$39.83 million from \$51.60 million over the projection period;
- **Gracemere:** estimated increase from \$142.95 million to \$315.10 million between 2020 and 2041;
- **Bouldercombe:** between 2020 and 2041, the anticipated growth is from \$21.47 million in 2020 to \$28.32 million;
- **Rockhampton Region – West:** annual available expenditure is estimated to increase from \$36.21 million in 2020 to \$53.97 million in 2041;
- **Rockhampton Regional Council Total:** in total is it anticipated that the annual available retail expenditure from residents of Rockhampton Regional Council will increase from \$1,002.84 million to \$1,553.74 million between 2020 and 2041;
- **Rockhampton Region – East:** estimated to increase from \$39.11 million in 2020 to \$63.13 million in 2041;
- **Glenlee – Rockyview:** anticipated to grow from \$60.38 million to \$80.07 million between 2020 and 2041;
- **Livingstone Coastal Communities:** expected increase to \$331.15 million from \$676.12 million over the projection period;
- **Livingstone Shire Balance:** estimated increase from \$54.48 million to \$70.96 million between 2020 and 2041; and
- **Livingstone Shire Regional Council Total:** in total is it anticipated that the annual available retail expenditure from residents of Livingstone Shire will increase from \$485.13 million to \$890.28 million between 2020 and 2041.

Table 6-2 reports the available annual retail expenditure (in millions) for each catchment between 2020 and 2041. A detailed summary of the estimated annual retail expenditure by retail category and catchment is provided in Appendix B, Table B-2.

Table 6-2 Annual available expenditure (\$m), 2020 to 2041 (2020 dollars)

	2020	2021	2026	2031	2036	2041
Rockhampton North						
Total Grocery & Specialty	\$435.81	\$444.35	\$491.77	\$545.34	\$601.65	\$666.74
Total Bulky Goods	\$104.83	\$106.89	\$118.29	\$131.18	\$144.72	\$160.38
Total	\$540.64	\$551.24	\$610.06	\$676.52	\$746.37	\$827.12
Rockhampton South						
Total Grocery & Specialty	\$179.07	\$180.45	\$189.86	\$201.05	\$212.63	\$224.21

	2020	2021	2026	2031	2036	2041
Total Bulky Goods	\$42.67	\$43.00	\$45.25	\$47.91	\$50.67	\$53.43
Total	\$221.74	\$223.46	\$235.10	\$248.96	\$263.30	\$277.64
Mount Morgan						
Total Grocery & Specialty	\$32.41	\$32.83	\$34.72	\$36.87	\$39.32	\$41.99
Total Bulky Goods	\$7.42	\$7.51	\$7.94	\$8.44	\$9.00	\$9.61
Total	\$39.83	\$40.35	\$42.66	\$45.31	\$48.32	\$51.60
Gracemere						
Total Grocery & Specialty	\$115.31	\$118.92	\$143.39	\$172.94	\$210.78	\$254.16
Total Bulky Goods	\$27.65	\$28.51	\$34.38	\$41.46	\$50.54	\$60.94
Total	\$142.95	\$147.43	\$177.77	\$214.40	\$261.31	\$315.10
Bouldercombe						
Total Grocery & Specialty	\$17.32	\$17.56	\$18.86	\$20.03	\$21.36	\$22.85
Total Bulky Goods	\$4.15	\$4.21	\$4.52	\$4.80	\$5.12	\$5.47
Total	\$21.47	\$21.77	\$23.38	\$24.82	\$26.47	\$28.32
Rockhampton Region - West						
Total Grocery & Specialty	\$29.33	\$29.67	\$32.53	\$35.99	\$39.73	\$43.72
Total Bulky Goods	\$6.88	\$6.96	\$7.63	\$8.44	\$9.32	\$10.25
Total	\$36.21	\$36.64	\$40.16	\$44.43	\$49.05	\$53.97
Rockhampton Regional Council Total						
Total Grocery & Specialty	\$809.24	\$823.79	\$911.13	\$1,012.22	\$1,125.47	\$1,253.66
Total Bulky Goods	\$193.59	\$197.08	\$218.01	\$242.23	\$269.36	\$300.08
Total	\$1,002.84	\$1,020.88	\$1,129.14	\$1,254.45	\$1,394.83	\$1,553.74
Rockhampton Region - East						
Total Grocery & Specialty	\$31.59	\$31.88	\$35.66	\$40.29	\$45.41	\$50.98
Total Bulky Goods	\$7.53	\$7.60	\$8.50	\$9.60	\$10.82	\$12.15
Total	\$39.11	\$39.48	\$44.16	\$49.89	\$56.23	\$63.13
Glenlee - Rockyview						
Total Grocery & Specialty	\$49.40	\$50.03	\$53.66	\$57.32	\$61.18	\$65.51
Total Bulky Goods	\$10.99	\$11.13	\$11.93	\$12.75	\$13.61	\$14.57
Total	\$60.38	\$61.15	\$65.59	\$70.07	\$74.79	\$80.07
Livingstone Coastal Communities						
Total Grocery & Specialty	\$267.30	\$274.14	\$322.65	\$389.06	\$467.82	\$545.74
Total Bulky Goods	\$63.86	\$65.49	\$77.08	\$92.95	\$111.76	\$130.38
Total	\$331.15	\$339.63	\$399.73	\$482.01	\$579.57	\$676.12
Livingstone Shire Balance						
Total Grocery & Specialty	\$43.89	\$44.19	\$46.67	\$49.90	\$53.40	\$57.17

	2020	2021	2026	2031	2036	2041
Total Bulky Goods	\$10.59	\$10.66	\$11.26	\$12.04	\$12.88	\$13.79
Total	\$54.48	\$54.84	\$57.93	\$61.94	\$66.28	\$70.96
Livingstone Shire Council Total						
Total Grocery & Specialty	\$392.17	\$400.23	\$458.64	\$536.57	\$627.80	\$719.40
Total Bulky Goods	\$92.96	\$94.87	\$108.77	\$127.33	\$149.06	\$170.88
Total	\$485.13	\$495.10	\$567.41	\$663.90	\$776.87	\$890.28

Source: Derived from ABS (2018) Retail Trade publication, ABS (2018) Household Expenditure Survey and QGSO (2018) medium series population projections

6.1.2 Adjusted Retail Expenditure

According to the 2020 eCommerce Industry Report (Australia Post, 2020), it has been estimated that by the end of 2020, online spending will account for 15.0% of the total retail market in Australia. Therefore, adjusting retail expenditure estimates to account for an ongoing shift to online purchasing and fulfilment is paramount. Based on the regional nature of Rockhampton, it is likely that the shift towards online shopping, particularly with respect to grocery shopping, will be slower than in metropolitan areas (as discussed in Section 5.1.1). This is largely due to online grocery orders ultimately being fulfilled by local supermarkets, as opposed to dark stores, as is the case in the metropolitan context. However, a small allowance for online expenditure for groceries and take home-food has been accounted for, recognising that grocery needs may partially be met by online retailers without a local retail shopfront.

As such, the proportion of retail expenditure attributable to online shopping is likely to vary across the retail expenditure categories and is also likely to continue to increase over time as online shopping becomes increasingly accessible. The proportion of sales attributable to online retailers is likely to be significantly higher for the comparison retail categories and has likely been accelerated by the COVID-19 pandemic, with residents adjusting their shopping habits permanently within these categories.

Table 6-3 below details the proportion of retail expenditure which is likely to be leaked from Rockhampton City due to online sales, by retail expenditure category over the projection horizon.

Table 6-3 Proportion of Retail Sales Attributable to Online Shopping – Rockhampton City, 2020 to 2041

Online Leakage	2020	2021	2026	2031	2036	2041
Groceries & take home food	2.5%	2.6%	3.2%	3.8%	4.4%	5.0%
Dining & take away food	5.0%	5.1%	5.7%	6.3%	6.9%	7.5%
Clothing, footwear & apparel	22.5%	22.9%	24.6%	26.4%	28.2%	30.0%
Personal & other goods	22.5%	22.9%	24.6%	26.4%	28.2%	30.0%
Core bulky goods	22.5%	22.9%	24.6%	26.4%	28.2%	30.0%
Ancillary bulky goods	22.5%	22.9%	24.6%	26.4%	28.2%	30.0%
Hardware	10.0%	10.2%	11.4%	12.6%	13.8%	15.0%
Takeaway liquor	5.0%	5.1%	5.7%	6.3%	6.9%	7.5%
Average	14.1%	14.3%	15.6%	16.8%	18.1%	19.4%

Source: CDM Smith Analysis (2021)

6.1.2.1 Annual Available Retail Expenditure

To convert average weekly household estimates to annual available expenditure estimates, the assessment has utilised the household projections reported in Section 2.3. Extrapolating the average annual weekly expenditure per

household in each area to be an annual figure, then multiplying this value by the number of households per catchment yields a total annual available expenditure by catchment.

Annual available retail expenditure within each catchment area is anticipated to increase as follows:

- **Rockhampton North:** estimated to increase from \$482.16 million in 2020 to \$700.64 million in 2041;
- **Rockhampton South:** anticipated to grow from \$197.79 million to \$235.24 million between 2020 and 2041;
- **Mount Morgan:** expected increase to \$35.68 million from \$43.96 million over the projection period;
- **Gracemere:** estimated increase from \$127.53 million to \$267.03 million between 2020 and 2041;
- **Bouldercombe:** between 2020 and 2041, the anticipated growth is from \$19.15 million in 2020 to \$24.00 million;
- **Rockhampton Region – West:** annual available expenditure is estimated to increase from \$32.30 million in 2020 to \$45.75 million in 2041; and
- **Rockhampton Regional Council Total:** in total is it anticipated that the adjusted annual available retail expenditure from residents of Rockhampton Regional Council will increase from \$894.62 million to \$1,316.61 million between 2020 and 2041.

Table 6-4 reports the adjusted available annual retail expenditure (in millions) for each catchment between 2020 and 2041. A detailed summary of the estimated annual retail expenditure by retail category and catchment is provided in Appendix B, Table B-5.

Table 6-4 Annual available expenditure (\$m), 2020 to 2041 (2020 dollars)

	2020	2021	2026	2031	2036	2041
Rockhampton North						
Total Grocery & Specialty	\$398.81	\$405.82	\$444.62	\$488.07	\$532.95	\$584.51
Total Bulky Goods	\$83.35	\$84.62	\$91.65	\$99.42	\$107.24	\$116.13
Total	\$482.16	\$490.44	\$536.28	\$587.49	\$640.19	\$700.64
Rockhampton South						
Total Grocery & Specialty	\$163.86	\$164.80	\$171.65	\$179.93	\$188.35	\$196.55
Total Bulky Goods	\$33.92	\$34.04	\$35.05	\$36.31	\$37.54	\$38.68
Total	\$197.79	\$198.84	\$206.70	\$216.24	\$225.89	\$235.24
Mount Morgan						
Total Grocery & Specialty	\$29.78	\$30.10	\$31.52	\$33.15	\$35.00	\$36.99
Total Bulky Goods	\$5.90	\$5.95	\$6.16	\$6.40	\$6.68	\$6.97
Total	\$35.68	\$36.06	\$37.68	\$39.55	\$41.67	\$43.96
Gracemere						
Total Grocery & Specialty	\$105.55	\$108.64	\$129.69	\$154.83	\$186.78	\$222.90
Total Bulky Goods	\$21.98	\$22.58	\$26.64	\$31.43	\$37.45	\$44.13
Total	\$127.53	\$131.22	\$156.33	\$186.26	\$224.23	\$267.03
Bouldercombe						
Total Grocery & Specialty	\$15.85	\$16.05	\$17.06	\$17.93	\$18.93	\$20.04
Total Bulky Goods	\$3.30	\$3.33	\$3.50	\$3.64	\$3.79	\$3.96

	2020	2021	2026	2031	2036	2041
Total	\$19.15	\$19.38	\$20.56	\$21.57	\$22.72	\$24.00
Rockhampton Region - West						
Total Grocery & Specialty	\$26.84	\$27.10	\$29.41	\$32.21	\$35.19	\$38.33
Total Bulky Goods	\$5.47	\$5.51	\$5.91	\$6.40	\$6.90	\$7.42
Total	\$32.30	\$32.61	\$35.32	\$38.61	\$42.10	\$45.75
Rockhampton Regional Council Total						
Total Grocery & Specialty	\$740.69	\$752.51	\$823.95	\$906.12	\$997.20	\$1,099.32
Total Bulky Goods	\$153.93	\$156.03	\$168.92	\$183.59	\$199.60	\$217.29
Total	\$894.62	\$908.54	\$992.87	\$1,089.71	\$1,196.80	\$1,316.61
Rockhampton Region - East						
Total Grocery & Specialty	\$28.93	\$29.14	\$32.27	\$36.09	\$40.26	\$44.74
Total Bulky Goods	\$5.98	\$6.01	\$6.58	\$7.28	\$8.02	\$8.80
Total	\$34.91	\$35.16	\$38.86	\$43.37	\$48.28	\$53.54
Glenlee - Rockyview						
Total Grocery & Specialty	\$45.20	\$45.68	\$48.51	\$51.30	\$54.19	\$57.42
Total Bulky Goods	\$8.72	\$8.80	\$9.23	\$9.65	\$10.07	\$10.53
Total	\$53.92	\$54.48	\$57.74	\$60.94	\$64.26	\$67.95
Livingstone Coastal Communities						
Total Grocery & Specialty	\$244.75	\$250.51	\$291.90	\$348.44	\$414.70	\$478.80
Total Bulky Goods	\$50.78	\$51.86	\$59.73	\$70.46	\$82.83	\$94.43
Total	\$295.53	\$302.37	\$351.63	\$418.89	\$497.53	\$573.22
Livingstone Shire Balance						
Total Grocery & Specialty	\$40.16	\$40.35	\$42.20	\$44.66	\$47.30	\$50.12
Total Bulky Goods	\$8.42	\$8.44	\$8.72	\$9.12	\$9.55	\$9.99
Total	\$48.58	\$48.79	\$50.92	\$53.78	\$56.85	\$60.10
Livingstone Shire Council Total						
Total Grocery & Specialty	\$359.04	\$365.69	\$414.88	\$480.48	\$556.45	\$631.07
Total Bulky Goods	\$73.91	\$75.11	\$84.27	\$96.50	\$110.46	\$123.74
Total	\$432.95	\$440.80	\$499.15	\$576.98	\$666.91	\$754.81

Source: Derived from ABS (2018) Retail Trade publication, ABS (2018) Household Expenditure Survey and QGSO (2018) medium series population projections

6.2 Supermarket Demand Assessment

6.2.1 Supermarket Expenditure

The estimates outlined in Table 6-4 above provide a high-level overview of the total available retail expenditure for each catchment. However, when assessing supermarket demand the retail category of relevance is the groceries and take-home food category. As previously identified, the assessment of future demand for supermarkets is limited to

consideration of the catchments within Rockhampton Regional Council plus Glenlee-Rockyview, as other parts of Livingstone Shire Council are likely to have their needs predominately met by supermarket provision within Livingstone Shire.

Table 6-5 denotes groceries and take home food expenditure estimates by Catchment between 2020 and 2041.

Table 6-5 Groceries and take home food expenditure by catchment, 2020 to 2041

Groceries and Take Home Food	2020	2021	2026	2031	2036	2041
Rockhampton North	\$206.40	\$210.19	\$231.20	\$254.81	\$279.38	\$307.67
Rockhampton South	\$84.56	\$85.11	\$89.00	\$93.67	\$98.45	\$103.17
Mount Morgan	\$16.34	\$16.53	\$17.37	\$18.34	\$19.43	\$20.62
Gracemere	\$54.90	\$56.55	\$67.77	\$81.23	\$98.40	\$117.91
Bouldercombe	\$8.26	\$8.36	\$8.92	\$9.42	\$9.98	\$10.61
Rockhampton Region - West	\$13.78	\$13.93	\$15.18	\$16.69	\$18.31	\$20.02
Glenlee - Rockyview	\$22.85	\$23.11	\$24.64	\$26.16	\$27.74	\$29.52
Total	\$407.09	\$413.78	\$454.08	\$500.32	\$551.69	\$609.52

Source: Derived from Appendix B Table

By nature of the groceries and take home food sector, these estimates include purchases which are not likely to occur at a supermarket. Additionally, supermarkets also sell non-grocery items. As such, the analysis of available supermarket expenditure within the catchment areas relies on the following assumptions:

- 80% of available expenditure on groceries and take-home food in each catchment is captured by supermarkets. Typically, supermarkets capture in the order of 75-80% of grocery and take-home food expenditure, with our analysis adopting the upper level of this range. This assumption is held constant over the projection period; and
- 10% of total expenditure at supermarkets is spent on general merchandise (non-grocery items). Supermarkets generally generate between 5% and 10% of their turnover from general merchandise items. This assessment has assumed that 10% of total expenditure at supermarkets within the trade area is spent on general merchandise, with this assumption held constant over the projection period.

Overall, the relevant catchment areas (Rockhampton Regional Council plus Glenlee-Rockyview) are anticipated to have annual available supermarket expenditure of \$341.08 million in 2020, growing to \$510.68 million by 2041, with Rockhampton North anticipated to contribute most towards this total (\$172.93 million in 2020, increasing to \$257.78 million in 2041).

Table 6-6 denotes supermarket expenditure (groceries plus general merchandise) by catchment between 2020 and 2041.

Table 6-6 Annual Available Supermarket Expenditure by Catchment (\$m), 2020 to 2041

	2020	2021	2026	2031	2036	2041
Rockhampton North	\$172.93	\$176.10	\$193.71	\$213.49	\$234.07	\$257.78
Rockhampton South	\$70.85	\$71.31	\$74.57	\$78.48	\$82.48	\$86.44
Mount Morgan	\$13.69	\$13.85	\$14.55	\$15.36	\$16.28	\$17.28
Gracemere	\$46.00	\$47.38	\$56.78	\$68.06	\$82.44	\$98.79
Bouldercombe	\$6.92	\$7.01	\$7.48	\$7.89	\$8.36	\$8.89
Rockhampton Region - West	\$11.55	\$11.67	\$12.71	\$13.98	\$15.34	\$16.77

	2020	2021	2026	2031	2036	2041
Glenlee - Rockyview	\$19.14	\$19.36	\$20.64	\$21.91	\$23.24	\$24.73
Total	\$341.08	\$346.68	\$380.44	\$419.17	\$462.21	\$510.68

Source: CDM Smith estimates

6.2.2 Supportable Supermarket Floorspace

To convert available supermarket expenditure estimates to supportable floor space, the assessment has assumed an average turnover productivity of \$9,500/sqm, as per standard industry practice, increasing at an average annual rate of 0.5% per annum over the projection horizon.

Based on the above assumptions, supportable supermarket floor space within the relevant catchment area is projected to increase from 35,903 sqm in 2020 to 48,411 sqm by 2041.

The supportable supermarket floor space (measured in square metres) for each catchment is as follows:

- **Rockhampton North:** anticipated to increase by 6,233sqm between 2020 and 2041;
- **Rockhampton South:** between 2020 and 2041 estimated increase in demand in the order of 736sqm;
- **Mount Morgan:** increase in demand of 197sqm between 2020 and 2041;
- **Gracemere:** anticipated increase in demand of 4,523sqm by 2041;
- **Bouldercombe:** represents the least growth in supermarket floorspace of 115sqm between 2020 and 2041;
- **Rockhampton Region – West:** anticipated to increase by 374sqm between 2020 and 2041; and
- **Glenlee-Rockyview:** anticipated to increase from 2,015sqm in 2020 to 2,345sqm in 2041.

Table 6-7 summarises the supportable supermarket floor space by catchment between 2020 and 2041.

Table 6-7 Supermarket Floor Space Demand (sqm) by Catchment, 2020 to 2041

Catchment	2020	2021	2026	2031	2036	2041
Rockhampton North	18,203	18,445	19,789	21,273	22,749	24,436
Rockhampton South	7,458	7,469	7,618	7,820	8,017	8,194
Mount Morgan	1,441	1,450	1,487	1,531	1,582	1,638
Gracemere	4,842	4,963	5,801	6,782	8,012	9,365
Bouldercombe	728	734	764	786	813	843
Rockhampton Region - West	1,216	1,222	1,299	1,393	1,491	1,590
Glenlee - Rockyview	2,015	2,028	2,109	2,184	2,259	2,345
Total	35,903	36,311	38,867	41,769	44,923	48,411

Source: CDM Smith estimates

6.2.3 Supply Demand Balance

In assessing the need for additional supermarket floor space within Rockhampton, the following sub-regions were analysed:

- **Combined Rockhampton North and Glenlee-Rockyview catchments:** This approach has been taken to recognise that residents within Glenlee-Rockyview have their supermarket needs met by supermarket provision within the Rockhampton North catchment, as opposed to supermarkets within the coastal areas of Livingstone Shire. It is

also understood that development pressures for additional supermarket provision are most pressing within North Rockhampton;

- **Gracemere:** The demand for supermarkets within the Gracemere catchment has been assessed in isolation, recognising its relative distance from other communities; and
- **Balance of Rockhampton:** The remaining catchments have been amalgamated recognising that residents within these catchments are likely to have their supermarket needs either fully or partially met by centres within Rockhampton South (i.e. Allenstown Plaza or City Centre Plaza in the CBD). It is also understood that Allenstown Plaza has intent to expand their supermarket offering, with the identified catchments likely representative of the broadest area from which trade would be captured.

The assessment has compared existing supply against projected demand to determine future supermarket need at a catchment level to 2041. In identifying the need for additional supermarkets at a catchment level, the assessment has considered existing approvals and designated centres, as outlined in the discussion presented below. Based on the above assumptions, the assessment identifies the following additional supermarket need to 2041:

- **Combined Rockhampton North and Glenlee-Rockyview catchments:** The analysis suggests demand for approximately two additional full line supermarkets within this catchment by 2041 (a full line supermarket is typically ~3,000-4,000sqm in size). It is understood that development approval has been granted for an Aldi supermarket at North Rockhampton, but construction is yet to commence. Additionally, it is understood that development approval has been granted for a centre at the corner of Springfield Drive and Nagle Drive for a centre anchored by a 750sqm supermarket, with the developer currently advertising for expressions of interest (i.e. the designated neighbourhood centre at Norman Road, Norman Gardens).

These developments would capture the growth in supermarket floor space demand within the combined Rockhampton North and Glenlee – Rockyview catchment until the 2026 to 2031 period, with demand for another full line supermarket not manifesting until between 2036 and 2041. Whilst Parkhurst represents the ideal location for additional supermarket floor space in Rockhampton North given its District Centre designation, the inventory identified that whilst there were vacancies, there was insufficient capacity within District Centre zoned land to accommodate centre expansion to accommodate another full line supermarket. Should the approved Aldi and/or supermarket development at the corner of Springfield Drive and Nagle Drive ultimately not proceed an additional full line supermarket within Rockhampton North would be required between 2026 and 2031.

- **Gracemere:** The analysis indicates that demand is likely to manifest for an additional full line supermarket in the 2031 to 2036 period, based solely on demand within the Gracemere catchment. By 2041, the analysis suggests potential also exists for a limited line supermarket (~1,500sqm) within Gracemere.
- **Balance of region:** A need for additional supermarket floor space manifests from 2031 onwards but is of insufficient scale to support an additional full line supermarket throughout the projection horizon. It is suggested that the expansion of further supermarket provision be concentrated within the Rockhampton South catchment, with the assessment suggestive of demand for an additional limited line supermarket, which is likely to be accommodated within Allenstown.

Table 6-8 summarises the supply demand balance assessment for additional supermarket floor space within the defined sub-areas between 2020 and 2041.

Table 6-8 Supermarket Floor Space Demand (sqm) by Catchment, 2020 to 2041

Catchment	2020	2021	2026	2031	2036	2041
Rockhampton North + Glenlee -Rockyview						
Existing Supply	21,360	21,360	21,360	21,360	21,360	21,360
Demand	21,450	21,721	23,232	24,886	26,532	28,413

Catchment	2020	2021	2026	2031	2036	2041
Supply Demand Balance	-90	-360	-1,871	-3,525	-5,172	-7,052
Gracemere						
Existing Supply	4,323	4,323	4,323	4,323	4,323	4,323
Demand	5,137	5,265	6,154	7,195	8,500	9,935
Supply Demand Balance	-814	-942	-1,831	-2,872	-4,177	-5,612
Rockhampton Regional Council Balance						
Existing Supply	11,563	11,563	11,563	11,563	11,563	11,563
Demand	11,503	11,538	11,848	12,233	12,628	13,012
Supply Demand Balance	60	25	-285	-669	-1,065	-1,448

Source: CDM Smith estimates

6.3 Retail Floor Space Demand Assessment

Section 6.2 of the report focussed on the demand for supermarket floor space within Rockhampton Regional Council. The purpose of this section of the report is to identify the demand for additional retail floor space with Rockhampton Regional Council more broadly, to understand whether need exists to accommodate additional retail floor space, particularly within the comparison categories of specialty retail and bulky goods/showroom floor space.

Unlike the supermarket demand assessment, retail floor space within Rockhampton Regional Council is supported by demand both within Rockhampton Regional Council and within Livingstone Shire Council as a whole. Additionally, stakeholder consultation identified that Stockland Rockhampton also attracts expenditure from other major townships including Emerald and Gladstone. However, in addition to retail expenditure inflows to the region, there are significant expenditure outflows, predominately to online retailers, which offers a broader range of products and services. The previous Commercial Centres Study had assumed that on balance, retail expenditure outflows within the combined Rockhampton Regional Council / Livingstone Shire Council were balanced by retail expenditure inflows. This study has assumed that the combined Rockhampton Regional Council / Livingstone Shire Council represents the appropriate area of assessment, particularly within the comparison retail categories (i.e. residents within Livingstone Shire Council will travel to Rockhampton to have their higher order retail needs met).

However, the prevalence of online retailing has increased significantly subsequent to the completion this study. Therefore on balance, we have assumed that net outflows of expenditure by retail expenditure category are consistent with those presented in Table 6-3 of the report.

6.3.1 Supportable Retail Floor Space

The total supportable retail floorspace in each catchment is dependent on the retail turnover productivities of each retail expenditure category. Industry averages suggest an average turnover per square metre of between \$3,500 per square metre (hardware retailing) to \$9,500 per square metre (groceries and take home food) in 2020, with assumed turnover per square metre increasing at 0.5% per annum.

Table 6-9 details the assumed turnover productivities adopted in this assessment for each retail expenditure category.

Table 6-9 Annual Turnover Productivities by Retail Expenditure Category (\$/sqm)

Retail Expenditure Categories	2020	2021	2026	2031	2036	2041
Groceries & take home food	\$9,500	\$9,548	\$9,789	\$10,036	\$10,289	\$10,549
Dining & take away food	\$5,500	\$5,528	\$5,667	\$5,810	\$5,957	\$6,107
Clothing, footwear & apparel	\$5,500	\$5,528	\$5,667	\$5,810	\$5,957	\$6,107
Personal & other goods	\$5,500	\$5,528	\$5,667	\$5,810	\$5,957	\$6,107
Core bulky goods	\$4,500	\$4,523	\$4,637	\$4,754	\$4,874	\$4,997
Ancillary bulky goods	\$5,500	\$5,528	\$5,667	\$5,810	\$5,957	\$6,107
Hardware	\$3,500	\$3,518	\$3,606	\$3,697	\$3,791	\$3,886
Takeaway liquor	\$9,000	\$9,045	\$9,273	\$9,508	\$9,748	\$9,994
Average	\$6,063	\$6,093	\$6,247	\$6,404	\$6,566	\$6,732

Source: CDM Smith Analysis (2021)

Applying the turnovers in Table 6-9 to the adjusted retail expenditure estimates summarised in Table 6-4 and detailed in Appendix B (Table B-5), supportable retail floorspace estimates can be calculated. These calculations yield the following floorspace estimates by catchment:

Total supportable floorspace in each catchment area is anticipated to increase as follows:

- **Rockhampton North:** anticipated to increase from 73,468sqm in 2020 to 95,457sqm by 2041;
- **Rockhampton South:** anticipated to increase from 30,143sqm in 2020 to 32,056sqm by 2041;
- **Mount Morgan:** anticipated to increase from 5,343sqm in 2020 to 5,885sqm by 2041;
- **Gracemere:** anticipated to increase from 19,405sqm in 2020 to 36,330sqm by 2041;
- **Bouldercombe:** anticipated to increase from 2,913sqm in 2020 to 3,264sqm by 2041; and
- **Rockhampton Region – West:** anticipated to increase from 4,925sqm in 2020 to 6,237sqm by 2041.

Overall, Rockhampton Regional Council's supportable retail floorspace is estimated at 136,197sqm as of 2020, increasing to 179,229sqm in 2041. As previously noted, Livingstone Shire Council has its own centres network serving the local population, however, Rockhampton does service some retail needs of the adjoining local government area, as such, floorspace estimates for Livingstone Shire Council have also been estimated. It is anticipated that in total, residents within Livingstone Shire Council can currently support 65,845sqm of retail floor space, increasing to 102,622sqm in 2041.

Table 6-10 below summarises the supportable floorspace for each catchment. A detailed summary of the estimated supportable retail floorspace by retail category and catchment is provided in Appendix B, Table B-6.

Table 6-10 Supportable Retail Floorspace (sqm) by Catchment, 2020 to 2041

	2020	2021	2026	2031	2036	2041
Rockhampton North	73,468	74,333	79,148	84,429	89,583	95,457
Rockhampton South	30,143	30,143	30,513	31,083	31,615	32,056
Mount Morgan	5,343	5,371	5,466	5,586	5,731	5,885
Gracemere	19,405	19,861	23,041	26,730	31,334	36,330
Bouldercombe	2,913	2,932	3,029	3,094	3,174	3,264
Rockhampton Region - West	4,925	4,945	5,216	5,551	5,894	6,237

	2020	2021	2026	2031	2036	2041
Rockhampton Regional Council Total	136,197	137,584	146,412	156,473	167,330	179,229
Rockhampton Region - East	5,301	5,309	5,714	6,210	6,732	7,268
Glenlee – Rockyview	8,229	8,270	8,536	8,773	9,007	9,275
Livingstone Coastal Communities	44,913	45,709	51,761	60,042	69,436	77,891
Livingstone Shire Balance	7,402	7,395	7,515	7,729	7,954	8,188
Livingstone Shire Council Total	65,845	66,683	73,526	82,753	93,129	102,622

Source: CDM Smith Analysis (2021)

6.3.1.1 Supply Demand Balance

The comparison of existing and approved retail floor space supply (as identified in Section 4.3 of the report) against projected floor space demand highlights a significant oversupply of retail floor space within the broader region. This suggests that existing retail tenancies within Rockhampton Regional Council are likely to be underperforming relative to industry benchmarks, particularly those within the Rockhampton CBD and within the specialised centre zone precincts, based on existing levels of vacancy within these areas.

Whilst the supply demand balance is anticipated to improve over time, particularly if additional floor space provision is mostly limited to additional supermarket floor space, the oversupply of floor space is likely to persist over the project horizon.

This supply demand balance is summarised in Table 6-11 and is further detailed in Appendix B (Table B-7).

Table 6-11 Supply Demand Balance of Retail Floorspace – Rockhampton Regional Council and Livingstone Shire Council, 2020 to 2041

	2020	2021	2026	2031	2036	2041
Supply						
Rockhampton Regional Council	342,932	342,932	362,824	363,474	363,474	363,474
Livingstone Shire Council	33,540	33,540	46,113	46,113	46,113	46,113
Total	376,472	376,472	408,937	409,587	409,587	409,587
Demand						
Rockhampton Regional Council	136,197	137,584	146,412	156,473	167,330	179,229
Livingstone Shire Council	75,424	76,592	85,612	97,698	111,501	124,627
Total	211,621	214,176	232,024	254,171	278,831	303,856
Supply Demand Balance						
Rockhampton Regional Council	206,735	205,348	216,412	207,001	196,144	184,245
Livingstone Shire Council	-41,884	-43,052	-39,499	-51,585	-65,388	-78,514
Total	164,850	162,296	176,913	155,415	130,756	105,731

Note: A positive supply demand balance indicates an oversupply of retail floorspace in Rockhampton Regional Council.

Source: CDM Smith Analysis (2021) and Rockhampton Regional Council (2021)

6.4 Retail Expenditure Inflows Required to Achieve Industry Turnover Benchmarks

Section 6.3 of the report identified that based on our assessment of retail expenditure growth, expenditure retention assumptions and industry benchmarks by retail sub-category, there is currently a significant oversupply of retail floor space within Rockhampton Regional Council, particularly within the bulky goods and comparison-shopping sub-categories.

The purpose of this section is to identify the level of net expenditure inflows required for all occupied retail floor space in each catchment to achieve industry benchmark trading levels.

Residents of each catchment are likely to spend money in other areas of Rockhampton City, particularly on convenience retail on trips to and from work, school and home. Additionally, Rockhampton City is likely to lose some retail expenditure to larger regional cities (such as Mackay) or to Brisbane City, as residents purchase goods that are not available in Rockhampton Regional Council. This assessment has assumed that the incidence of leakage to surrounding areas (outside of Rockhampton) is likely to remain consistent across retail expenditure categories and constant over the projection period. However, based on the offering of retail in each catchment, there are likely to be varying degrees of expenditure leakage. For example, the Bouldercombe and Rockhampton Region – West catchments do not currently have any centres to service the local population, and therefore 100% of all retail expenditure generated by residents of these catchments would be leaked into other catchments within Rockhampton Regional Council.

Whilst residents of Rockhampton Regional Council may travel outside of their catchment and local government area to larger centres, the retail offering available within Rockhampton also attracts an inflow of retail expenditure from surrounding local government areas, predominantly Livingstone Shire. As such, Rockhampton offers the closest retail facilities to the portion of the neighbouring local government area. As with retail expenditure leakage, this assessment has assumed that the incidence of inflows from surrounding areas is likely to remain consistent across retail expenditure categories and constant over the projection period. However, based on the offering of retail in each catchment, there are likely to be varying degrees of expenditure inflows. For example, Rockhampton North contains Stockland Shopping Centre which is the largest offering of personal and other goods retailing within Rockhampton Regional Council and is therefore likely to draw expenditure from other Rockhampton catchments and from Livingstone Shire Council.

Based on the location and offering of retail facilities in Rockhampton Regional Council, it is likely that there would be a net retail expenditure inflow (i.e. more expenditure coming to Rockhampton Regional Council than escaping to other local government areas). However, the scale of net retail expenditure inflow required to account for the oversupply of retail floorspace in Rockhampton Regional Council is significant.

Table 6-12 below highlights that the approximate total expenditure necessary within each catchment to ensure the existing retail floorspace (342,932sqm) achieves benchmark trading levels is in the order of \$2,079.02 million as of 2020. Expenditure within Rockhampton Regional Council (as generated by residents of the area) accounts for less than half of this amount, as such, net retail expenditure inflows would need to account for approximately 232.4% of all expenditure in the area, with net inflows highest to the Rockhampton North and Rockhampton South catchments. The level of expenditure inflows to the Rockhampton North and Rockhampton South catchments are significant, highlighting that the oversupply of comparison retail floor space (i.e. specialty retail floor space in Rockhampton South and bulky goods retail floor space in Rockhampton North) is concentrated within these catchments.

Table 6-12 Estimated Necessary Net Retail Expenditure Inflow – Rockhampton Regional Council, 2020

	Current Available Retail Expenditure (\$m)	Current Retail Floorspace Demand	Current Retail Floorspace Provision	Approx. Necessary Retail Expenditure (\$m)	Net Inflow (%)
Rockhampton North	\$482.16	73,468	184,979	\$1,121.44	232.6%
Rockhampton South	\$197.79	30,143	137,177	\$831.64	420.5%
Mount Morgan	\$35.68	5,343	4,869	\$29.52	82.7%
Gracemere	\$127.53	19,405	15,907	\$96.43	75.6%
Bouldercombe	\$19.15	2,913	0	\$0.00	0.0%
Rockhampton Region – West	\$32.30	4,925	0	\$0.00	0.0%
Rockhampton Regional Council Total	\$894.62	136,197	342,932	\$2,079.02	232.4%

Source: CDM Smith Analysis (2021)

Section 7 Employment Projections

This section details employment projections for Rockhampton Regional Council and its component catchments, which represent a key input into the assessment of commercial office floor space demand.

7.1 Approach

Employment projections throughout this section have been derived based on the Queensland Government Statistician's Office (QGSO) employment projections. However, these employment projections are only available at the SA4 level and are not published at the local government area or SA2 level. Therefore, to establish employment projections for Rockhampton Regional Council, several assumptions have been made regarding the proportion of employment in the Central Queensland SA4 attributable to each SA2 within Rockhampton Regional Council. These assumptions include an assessment of the working population, built form and major economic activities in the region.

7.1.1 Employment Growth in Central Queensland SA4

Queensland Government Statistician's Office (QGSO) undertook employment projections for Queensland for five-year intervals to 2041 at the local government area level for SEQ and at the SA4 level for the remainder of Queensland. The Rockhampton Regional Council is contained within the Central Queensland SA4.

In the 2016 to 2041 period, the number of employed persons in Central Queensland SA4 is anticipated to increase from 125,051 persons in 2015-16 to 170,049 persons in 2040-41, or by 1.2% per annum. Employment growth in Central Queensland SA4 is anticipated to be highest in the sectors of rental, hiring and real estate services (2.7% per annum), professional, scientific and technical services (2.6% per annum) and administrative and support services (2.3% per annum). Agriculture, forestry and fishing sector within Central Queensland SA4 is anticipated to record the highest decline in total employment between 2015-16 and 2040-41.

Table 7-1 reports employment projections by industry type in Central Queensland SA4 in 2015-16 to 2040-41 period.

Table 7-1 Employment Projections by Industry – Central Queensland SA4, 2015-16 to 2040-41

Industry sector	2015-16	2020-21	2025-26	2030-31	2035-36	2040-41	Ave Ann Growth, 2015-16 to 2040-41
Agriculture, Forestry and Fishing	4,680	4,429	4,227	4,019	3,854	3,721	-0.9%
Mining	14,451	17,053	18,622	19,913	20,894	21,812	1.7%
Manufacturing	11,425	11,532	12,039	12,991	14,261	15,676	1.3%
Electricity, Gas, Water and Waste Services	2,683	2,765	2,635	2,737	2,948	3,167	0.7%
Construction	11,669	13,647	14,106	14,426	14,666	14,869	1.0%
Wholesale Trade	3,111	3,232	3,334	3,451	3,568	3,696	0.7%
Retail Trade	12,320	12,258	12,116	11,979	11,842	11,662	-0.2%
Accommodation and Food Services	9,164	9,688	10,387	11,135	11,900	12,677	1.3%
Transport, Postal and Warehousing	7,641	7,968	8,215	8,493	8,735	8,976	0.6%
Information Media and Telecommunications	597	612	644	682	714	747	0.9%
Financial and Insurance Services	2,140	2,044	1,916	1,865	1,952	2,091	-0.1%

Industry sector	2015-16	2020-21	2025-26	2030-31	2035-36	2040-41	Ave Ann Growth, 2015-16 to 2040-41
Rental, Hiring and Real Estate Services	1,600	1,869	2,172	2,490	2,800	3,143	2.7%
Professional, Scientific and Technical Services	5,725	6,586	7,556	8,573	9,601	10,810	2.6%
Administrative and Support Services	2,621	2,846	3,248	3,680	4,117	4,605	2.3%
Public Administration and Safety	6,863	7,314	7,880	8,465	9,071	9,654	1.4%
Education and Training	9,767	10,562	11,527	12,554	13,605	14,581	1.6%
Health Care and Social Assistance	12,784	14,195	15,795	17,558	19,376	21,110	2.0%
Arts and Recreation Services	716	745	778	815	857	899	0.9%
Other Services	5,095	5,330	5,525	5,739	5,952	6,153	0.8%
Total persons employed	125,051	134,675	142,724	151,566	160,713	170,049	1.2%

Source: QGSO (2018)

7.1.2 Rockhampton Regional Council and Catchments

The working population data at the SA2 level (Section 2.5.4) was rebased to coincide with the Economy ID working population total for Rockhampton Region Council. Based on this, employment in Rockhampton Regional Council accounted for 35.0% and 33.4% of total employment within Central Queensland SA4 as of the 2011 and 2016 Censuses respectively. The most significant sectors (in terms of proportion of total employment) in Central Queensland SA4 were:

- Information Media and Telecommunications: 62.5% and 66.2% of employment in Central Queensland SA4 in 2011 and 2016 (201 employed persons in 2011, increasing to 225 employed persons in 2016);
- Health Care and Social Assistance: 54.2% and 53.2% of employment in Central Queensland SA4 in 2011 and 2016 (1,272 employed persons in 2011, increasing to 1,544 employed persons in 2016); and
- Arts and Recreation Services: 48.5% and 52.7% of employment in Central Queensland SA4 in 2011 and 2016 (337 employed persons in 2011, increasing to 377 employed persons in 2016).

Across the catchments identified, employment as a share of total employment in Central Queensland SA4 was most significant in the Rockhampton North (15.8% or 18,467 employed persons) in 2011 and 15.3% or 19,126 employed persons in 2016) and Rockhampton South (16.2% or 18,951 employed persons in 2011 and 14.7% or 18,348 persons in 2016) catchments.

Table 7-2 reports Rockhampton Regional Council and share of employment in Central Queensland SA4 based on working population data.

Table 7-2 Rockhampton Regional Council share of Central Queensland SA4 Employment by Industry, 2011 and 2016 Census

Industry Sector	Rockhampton North		Rockhampton South		Mount Morgan		Gracemere		Bouldercombe		Rockhampton Regional - West		Rockhampton Regional Council	
	2011	2016	2011	2016	2011	2016	2011	2016	2011	2016	2011	2016	2011	2016
Agriculture, Forestry and Fishing	1.7%	2.3%	1.5%	2.5%	0.6%	0.5%	1.5%	1.6%	1.8%	1.8%	5.9%	7.6%	13.0%	16.2%
Mining	2.2%	2.8%	0.8%	0.7%	0.2%	0.1%	0.1%	0.2%	0.6%	0.3%	0.3%	0.3%	4.2%	4.4%
Manufacturing	21.0%	16.7%	5.1%	3.3%	0.1%	0.0%	0.6%	0.6%	0.9%	0.9%	0.1%	0.1%	27.8%	21.6%
Electricity, Gas, Water and Waste Services	24.5%	34.1%	12.0%	5.5%	0.0%	0.4%	1.2%	1.0%	0.0%	0.0%	7.3%	9.9%	45.0%	50.8%
Construction	13.9%	15.7%	9.1%	8.5%	0.3%	0.1%	2.1%	2.3%	0.6%	0.8%	0.8%	0.9%	26.8%	28.4%
Wholesale Trade	19.1%	21.5%	24.6%	21.1%	0.0%	0.0%	1.4%	2.6%	0.1%	0.2%	0.6%	0.4%	45.8%	45.7%
Retail Trade	25.1%	23.9%	14.4%	12.8%	0.4%	0.5%	1.0%	2.0%	0.2%	0.1%	0.1%	0.0%	41.3%	39.4%
Accommodation and Food Services	16.2%	13.9%	19.0%	15.8%	0.3%	0.3%	0.8%	1.9%	0.2%	0.1%	0.2%	0.2%	36.7%	32.2%
Transport, Postal and Warehousing	12.8%	10.9%	19.5%	17.1%	0.3%	0.2%	5.0%	6.6%	1.0%	0.7%	0.4%	1.6%	39.0%	37.1%
Information Media and Telecommunications	25.7%	25.4%	35.1%	39.1%	0.0%	0.7%	1.0%	0.9%	0.8%	0.0%	0.0%	0.0%	62.5%	66.2%
Financial and Insurance Services	16.3%	11.2%	33.1%	20.9%	0.0%	0.0%	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	49.7%	32.3%
Rental, Hiring and Real Estate Services	15.4%	13.3%	14.3%	20.3%	0.0%	0.9%	3.1%	3.6%	0.2%	0.8%	0.6%	0.3%	33.6%	39.1%
Professional, Scientific and Technical Services	11.1%	10.9%	20.1%	17.6%	0.2%	0.1%	0.6%	0.6%	0.0%	0.1%	0.2%	0.3%	32.3%	29.5%
Administrative and Support Services	18.7%	22.0%	14.3%	16.0%	0.3%	0.5%	0.9%	2.5%	0.3%	0.6%	1.2%	1.0%	35.8%	42.4%
Public Administration and Safety	14.5%	13.0%	32.5%	27.6%	0.6%	0.6%	1.8%	1.3%	0.2%	0.2%	0.0%	0.0%	49.6%	42.8%
Education and Training	26.7%	25.4%	17.2%	16.9%	1.0%	0.9%	1.9%	2.1%	0.5%	0.4%	0.4%	0.4%	47.7%	46.0%
Health Care and Social Assistance	12.4%	13.9%	39.0%	37.0%	1.0%	1.0%	1.6%	1.6%	0.0%	0.0%	0.1%	0.0%	54.2%	53.5%
Arts and Recreation Services	26.2%	27.3%	19.0%	20.9%	0.0%	0.0%	2.0%	4.4%	0.0%	0.0%	1.3%	0.0%	48.5%	52.7%
Other Services	20.3%	21.3%	18.9%	14.8%	0.4%	0.3%	1.7%	2.5%	0.3%	0.2%	0.5%	0.5%	42.1%	39.6%
Total persons employed	15.8%	15.3%	16.2%	14.7%	0.4%	0.4%	1.5%	1.8%	0.5%	0.4%	0.8%	0.8%	35.0%	33.4%

Source: Economy ID (2021), ABS Census of Population and Housing (2011 and 2016)

7.1.3 Assumptions

In preparing employment projections for the identified catchments within Rockhampton Regional Council, the following approach has been utilised:

- Working population employment by industry as a share of Central Queensland SA4 employment within each identified catchment within Rockhampton Regional Council is anticipated to increase at the same rate recorded between 2011 and 2016 in the 2016 to 2026 period (e.g. if agriculture employment within Rockhampton Regional Council as a share of total Central Queensland SA4 employment increased by 3.2% points between 2011 and 2016, then it is assumed agriculture will grow at this rate between 2016 and 2026); and
- From 2026, working population employment by industry as a share of Central Queensland SA4 employment within the Rockhampton Regional Council is anticipated to continue to increase, but at a slower rate relative to the 2016 to 2026 period.

To disaggregate to the two-digit ANZSIC level, consideration was given to the two-digit ANZSIC employment estimates as of the 2011 and 2016 Census for the catchments and Rockhampton Regional Council (rebased to Economy ID working population for RRC). In undertaking employment projections at the two-digit level, two-digit employment by industry share is anticipated to increase at the same rate recorded between 2011 and 2016 in the 2016 to 2026 period. Employment by industry share is anticipated to gradually increase at a slower rate from 2026 onwards.

7.2 Employment Projections for Rockhampton Regional Council and Catchments

7.2.1 Rockhampton Regional Council

Based on the approach detailed in Section 7.1.2, total employment within Rockhampton Regional Council is projected to increase from 41,790 persons in 2016 to 55,399 persons in 2041, or by 1.1% per annum. The most significant growth is anticipated to be in the following sectors:

- Rental, Hiring and Real Estate Services: anticipated increase of 4.6% per annum between 2016 and 2041;
- Administrative and Support Services: anticipated increase of 4.1% per annum between 2016 and 2041; and
- Mining: anticipated increase of 3.2% per annum between 2016 and 2041.

Conversely, the financial and insurance services (decreasing by 6.3% per annum) and manufacturing (decreasing by 1.0% per annum) are anticipated to record employment declines over the projection horizon.

Growth in total employment is anticipated to be highest in the health care and social assistance (additional 4,085 employed persons) and education and training (additional 2,935 employed persons) between 2016 and 2041.

Table 7-3 outlines projected employment at the one digit level for Rockhampton Region Council between 2016 and 2041, with Appendix C providing employment projections at the two-digit level.

Table 7-3 Employment Projections – Rockhampton Regional Council, 2016 to 2041

	2016	2021	2026	2031	2036	2041	Ave Ann Growth, 2016 to 2041
Agriculture, Forestry and Fishing	758	872	992	1,057	1,068	1,044	1.3%
Mining	641	808	1,024	1,214	1,337	1,412	3.2%
Manufacturing	2,471	1,803	1,428	1,567	1,744	1,924	-1.0%
Electricity, Gas, Water and Waste Services	1,362	1,605	1,854	2,197	2,546	2,784	2.9%
Construction	3,310	4,093	4,476	4,765	4,940	5,033	1.7%
Wholesale Trade	1,423	1,504	1,584	1,669	1,741	1,808	1.0%
Retail Trade	4,858	4,611	4,340	4,152	4,038	3,961	-0.8%
Accommodation and Food Services	2,955	2,693	2,434	2,460	2,583	2,740	-0.3%
Transport, Postal and Warehousing	2,835	2,827	2,835	2,930	3,059	3,155	0.4%
Information Media and Telecommunications	395	467	580	685	754	799	2.9%
Financial and Insurance Services	692	429	234	163	137	137	-6.3%
Rental, Hiring and Real Estate Services	626	835	1,110	1,414	1,680	1,910	4.6%
Professional, Scientific and Technical Services	1,689	1,766	1,844	1,941	2,090	2,329	1.3%
Administrative and Support Services	1,112	1,397	1,822	2,263	2,667	3,022	4.1%
Public Administration and Safety	2,935	2,639	2,436	2,308	2,313	2,422	-0.8%
Education and Training	4,495	4,682	5,356	6,179	6,884	7,430	2.0%
Health Care and Social Assistance	6,840	7,518	8,279	9,132	10,038	10,925	1.9%
Arts and Recreation Services	377	433	495	572	630	668	2.3%
Other Services	2,016	1,976	1,920	1,895	1,915	1,986	-0.1%
Total persons employed	41,790	42,958	45,043	48,563	52,164	55,489	1.1%

Source: CDM Smith (2021)

7.2.2 Employment Projections by Catchment

Based on the approach detailed in Section 7.1.3, within the identified catchments, employment growth is anticipated to be highest within the Gracemere and Rockhampton Regional - West catchments, increasing at an average annual growth rate of 3.1% and 2.6% per annum, respectively. Conversely, employment projections indicate employment in the Rockhampton South and Bouldercombe catchments are anticipated to grow at a slower rate compared to the other identified areas between 2016 and 2041, increasing at an average annual average growth rate of 0.1% and 1.2% per annum, respectively.

Overall, increases in total employment are anticipated to be highest in the Rockhampton North (8,900 persons) and Gracemere (2,663 persons).

Table 7-4 outlines projected total employment by catchment between 2016 and 2041, with Appendix C providing employment projections at the two-digit level.

Table 7-4 Total Employment Projections – Catchments in Rockhampton Regional Council, 2016 to 2041

Catchment	2016	2021	2026	2031	2036	2041	Ave. Ann Growth Rate, 2016-2041
Rockhampton North	19,126	20,079	21,612	24,048	26,284	28,026	1.5%
Rockhampton South	18,348	17,600	17,109	17,225	17,891	19,015	0.1%
Mount Morgan	474	510	588	668	739	798	2.1%
Gracemere	2,292	2,960	3,648	4,255	4,680	4,955	3.1%
Bouldercombe	503	488	524	585	641	684	1.2%
Rockhampton Regional - West	1,047	1,320	1,563	1,782	1,929	2,011	2.6%
Rockhampton Regional Council	41,790	42,957	45,044	48,563	52,164	55,489	1.1%

Note: AAGR is average annual growth rate.

Source: QGSO Employment Projections (2018), Economy ID (2020), ABS Census of Population and Housing (2016)

Section 8 Commercial Office Floor Space Demand Assessment

8.1 Commercial Office Demand

8.1.1 Sectors that Typically Utilise Commercial Office Space

The demand for commercial office space has been estimated in terms of traditional office space. The sectors that traditionally utilise commercial office space at the two-digit ANZSIC level are summarised in Table 8-1.

Table 8-1 Two Digit ANZSIC Sectors which Typically Require Commercial Office Space

One Digit ANZSIC Sectors	Two Digit ANZSIC Sectors
Financial & Insurance Services	<ul style="list-style-type: none"> Finance Insurance & Superannuation Funds Auxiliary Finance & Insurance Services
Professional, Scientific & Technical Services	<ul style="list-style-type: none"> Professional, Scientific & Technical Services (except Computer Systems Design & Related Services) Computer Systems Design & Related Services
Health Care & Social Assistance	<ul style="list-style-type: none"> Medical & Other Health Care Services
Rental, Hiring & Real Estate Services	<ul style="list-style-type: none"> Property Operators & Real Estate Services
Public Administration & Safety	<ul style="list-style-type: none"> Public Administration
Information Media & Telecommunications	<ul style="list-style-type: none"> Internet Publishing & Broadcasting Internet Service Providers, Web Search Portals & Data Processing Services
Administrative & Support Services	<ul style="list-style-type: none"> Administrative services

Source: CDM Smith Analysis, 2021

8.1.2 Projected Employment in Commercial Office Sectors

Based on the employment projections generated in Section 7 of the report and sectors requiring commercial floor space, total employment in commercial office sectors is anticipated to increase from 7,495 workers in 2021 to 10,498 workers in 2041.

Table 8-2 summarises the total employment in commercial office sectors between 2021 and 2041 with Rockhampton Regional Council and Appendix D providing a breakdown by catchment.

Table 8-2 Projected Total Employment in Commercial Office Sectors, Rockhampton Region Council, 2021 to 2041

	2021	2026	2031	2036	2041
Internet Publishing and Broadcasting	23	25	26	27	28
Internet Service Providers, Web Search Portals and Data Processing Services	21	31	40	45	48
Finance	185	83	46	34	33
Insurance and Superannuation Funds	83	53	42	38	40
Auxiliary Finance and Insurance Services	160	98	75	64	64
Property Operators and Real Estate Services	650	916	1,192	1,430	1,630

	2021	2026	2031	2036	2041
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	1,534	1,589	1,662	1,781	1,982
Computer System Design and Related Services	232	254	279	309	347
Public Administration	1,823	1,676	1,596	1,611	1,691
Medical and Other Health Care Services	2,238	2,665	3,070	3,440	3,761
Administrative Services	545	622	691	779	873
Total	7,495	8,012	8,719	9,558	10,498

Source: CDM Smith Analysis, 2021

The number of workers employed in commercial office sectors by catchment is anticipated to increase as follows:

- Rockhampton North: increasing from 2,638 workers in 2021 to 3,804 workers in 2041;
- Rockhampton South: increasing from 4,411 workers in 2021 to 5,802 workers in 2041;
- Mount Morgan: increasing from 113 workers in 2021 to 255 workers in 2041;
- Gracemere: increasing from 246 workers in 2021 to 375 workers in 2041;
- Bouldercombe: increasing from 56 workers in 2021 to 192 workers in 2041; and
- Rockhampton Regional - West: increasing from 30 workers in 2021 to 71 workers in 2041.

Table 8-3 summarises the projected total employment in commercial office sectors by catchment between 2021 and 2041.

Table 8-3 Total Employment in Commercial Office Sectors by Catchment, 2021 to 2041

	2021	2026	2031	2036	2041
Rockhampton North	2,638	2,835	3,109	3,449	3,804
Rockhampton South	4,411	4,609	4,921	5,313	5,802
Mount Morgan	113	155	197	230	255
Gracemere	246	273	304	338	375
Bouldercombe	56	99	137	167	192
Rockhampton Regional – West	30	40	52	62	71

Source: CDM Smith Analysis (2021)

The accommodation requirements of businesses within these sectors vary depending on employment size. Typically, requirements can be considered in terms of businesses that are sole traders or employing businesses (i.e. businesses that employ more than one person). Sole traders can often work from home and as such, do not require commercial office space.

To estimate the proportion of employment contained as sole traders and within employing businesses, the assessment has utilised data from the ABS Counts of Australian Businesses publication (Cat. No. 8165.0) for the SA2s within the catchments identified. As of June 2020, the incidence of employment within sole traders varied by industry sector and catchment, Table 8-3 below summarises the distribution of employment by business size by relevant single digit industry sectors in 2020.

For the purposes of this assessment, it was assumed that the proportion of employment contained within sole traders in 2020 by catchment remains constant throughout the projection period.

Table 8-4 Proportion of Employment in Service Office Sectors by Employment Size, Catchments, June 2020

Sectors	Rockhampton North		Rockhampton South		Mount Morgan		Gracemere		Bouldercombe		Rockhampton Regional - West		Rockhampton Regional Council	
	% in employing	% Sole Trading	% in employing	% Sole Trading	% in employing	% Sole Trading	% in employing	% Sole Trading	% in employing	% Sole Trading	% in employing	% Sole Trading	% in employing	% Sole Trading
Financial and Insurance Services	15.0%	85.0%	20.0%	80.0%	-	-	0.0%	100.0%	60.0%	40.0%	0.0%	100.0%	15.0%	85.0%
Professional, Scientific and Technical Services	45.0%	55.0%	65.0%	35.0%	-	-	30.0%	70.0%	45.0%	55.0%	50.0%	50.0%	55.0%	45.0%
Health Care and Social Assistance	50.0%	50.0%	55.0%	45.0%	-	-	35.0%	65.0%	-	-	0.0%	100.0%	50.0%	50.0%
Rental, Hiring and Real Estate Services	15.0%	85.0%	20.0%	80.0%	45.0%	55.0%	10.0%	90.0%	85.0%	15.0%	15.0%	85.0%	20.0%	80.0%
Public Administration and Safety	65.0%	35.0%	50.0%	50.0%	-	-	0.0%	100.0%	-	-	-	-	50.0%	50.0%
Information Media and Telecommunications	55.0%	45.0%	65.0%	35.0%	-	-	100.0%	0.0%	-	-	-	-	65.0%	35.0%
Administrative and Support Services	50.0%	50.0%	45.0%	55.0%	0.0%	100.0%	50.0%	50.0%	0.0%	100.0%	0.0%	100.0%	40.0%	60.0%

Note: Estimates are rounded to the nearest 5%.

Source: ABS Counts of Australian Businesses Cat. No. 8165.0 (2021)

Applying the proportion of employment within sole traders to the employment estimates in Table 8-2 provides an estimate on the number of persons employed as sole traders and persons in employing business within the catchments and Rockhampton Regional Council more broadly.

Based on these assumptions, the number of persons employed as sole traders and in employing businesses within Rockhampton Region Council is anticipated to increase as follows:

- Sole Traders: anticipated to increase from 3,821 workers in 2021 to 5,431 workers in 2041; and
- Employing businesses: anticipated to increase from 3,674 workers in 2021 to 5,066 workers in 2041.

Table 8-4 summarises the number of employees in sole trader or employing businesses between 2021 and 2041, within Rockhampton Regional Council.

Table 8-5 Employment in Sole Trader and Employing Businesses, Rockhampton Regional Council, 2021 to 2041

Industry Sector	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	10	10	10	10	11
Internet Service Providers, Web Search Portals and Data Processing Services	7	11	14	16	17
Finance	151	68	38	28	27
Insurance and Superannuation Funds	69	45	35	32	33
Auxiliary Finance and Insurance Services	130	78	60	51	51
Property Operators and Real Estate Services	514	709	917	1,098	1,251
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	666	702	747	809	902
Computer System Design and Related Services	112	128	144	162	182
Public Administration	828	748	701	704	738
Medical and Other Health Care Services	1,037	1,231	1,415	1,584	1,732
Administrative Services	297	342	384	433	486
Total	3,821	4,071	4,467	4,927	5,431
Employment within Employing Businesses					
Internet Publishing and Broadcasting	14	15	16	16	17
Internet Service Providers, Web Search Portals and Data Processing Services	14	20	26	30	31
Finance	34	15	8	6	6
Insurance and Superannuation Funds	14	9	7	6	6
Auxiliary Finance and Insurance Services	31	20	15	13	13
Property Operators and Real Estate Services	136	207	275	332	379
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	869	887	915	972	1,080
Computer System Design and Related Services	120	127	135	148	165
Public Administration	995	928	894	907	953
Medical and Other Health Care Services	1,201	1,434	1,655	1,855	2,029
Administrative Services	248	280	307	345	387

Industry Sector	2021	2026	2031	2036	2041
Total	3,674	3,941	4,253	4,631	5,066
Total Employment					
Internet Publishing and Broadcasting	23	25	26	27	28
Internet Service Providers, Web Search Portals and Data Processing Services	21	31	40	45	48
Finance	185	83	46	34	33
Insurance and Superannuation Funds	83	53	42	38	40
Auxiliary Finance and Insurance Services	160	98	75	64	64
Property Operators and Real Estate Services	650	916	1,192	1,430	1,630
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	1,534	1,589	1,662	1,781	1,982
Computer System Design and Related Services	232	254	279	309	347
Public Administration	1,823	1,676	1,596	1,611	1,691
Medical and Other Health Care Services	2,238	2,665	3,070	3,440	3,761
Administrative Services	545	622	691	779	873
Total	7,495	8,012	8,719	9,558	10,498

Source: CDM Smith Analysis (2021)

By applying the above assumptions to the catchments, the number of persons employed as sole traders and in employing businesses is anticipated to be most significant in the Rockhampton North and Rockhampton South catchments. Conversely, employment is anticipated to lowest in the Mount Morgan and Rockhampton Regional – West catchments.

Table 8-6 summarises the total number of employees in sole trader or employing businesses between 2021 and 2041 by catchment with Appendix E providing a breakdown by catchment.

Table 8-6 Employment in Sole Trader and Employing Businesses, Catchments, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Rockhampton North	1,360	1,450	1,599	1,782	1,973
Rockhampton South	2,212	2,331	2,527	2,755	3,021
Mount Morgan	14	21	30	37	42
Gracemere	186	195	210	231	257
Bouldercombe	33	54	75	91	104
Rockhampton Regional – West	16	20	26	31	35
Employment within Employing Businesses					
Rockhampton North	1,278	1,385	1,510	1,666	1,831
Rockhampton South	2,199	2,278	2,394	2,558	2,781
Mount Morgan	100	135	167	193	213
Gracemere	61	78	94	106	118
Bouldercombe	23	44	62	77	88
Rockhampton Regional – West	14	20	26	31	35

	2021	2026	2031	2036	2041
Total Employment					
Rockhampton North	2,638	2,835	3,109	3,449	3,804
Rockhampton South	4,411	4,609	4,921	5,313	5,802
Mount Morgan	113	155	197	230	255
Gracemere	246	273	304	338	375
Bouldercombe	56	99	137	167	192
Rockhampton Regional – West	30	40	52	62	71

Source: CDM Smith Analysis (2021)

8.1.3 Projected Employment Accommodated in Commercial Office Space

8.1.3.1 Incidence of Persons Working from Home

As mentioned in the preceding sections, not all persons employed as sole traders or in employing businesses will ultimately be accommodated in commercial office space, due to the increasing availability and affordability of home technologies and the expectation that working from home (or remote workplace arrangements) will become increasingly popular.

As illustrated in Table 8-6 there was an increase in the incidence of persons working from home in Rockhampton Regional Council over the last two Censuses. Hence, not all those that are employed in commercial office sectors are anticipated to require commercial office space. The incidence of persons working from home within commercial office sectors has been higher than the overall average and increased at a faster rate between the 2011 and 2016 Censuses.

Growth in the incidence of persons working from home varied significantly across sectors and was highest within the internet publishing and broadcasting, computer system design and related services and administrative services sectors.

Table 8-7 summarises the incidence of persons working from home in commercial office sectors in Rockhampton Regional Council between 2011 and 2016. Appendix F summarises the incidence of persons working from home by catchment.

Table 8-7 Incidence of persons working from home – Commercial Office Sectors, Rockhampton Regional Council

	2011	2016	% change
Internet Publishing and Broadcasting	-	98.2%	-
Internet Service Providers, Web Search Portals and Data Processing Services	0.0%	0.0%	0.0%
Finance	0.0%	0.0%	0.0%
Insurance and Superannuation Funds	3.0%	0.0%	-3.0%
Auxiliary Finance and Insurance Services	2.2%	3.4%	1.2%
Property Operators and Real Estate Services	6.2%	6.1%	-0.1%
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	8.5%	9.2%	0.8%
Computer System Design and Related Services	6.3%	9.1%	2.8%
Public Administration	0.5%	0.3%	-0.2%
Medical and Other Health Care Services	2.0%	2.9%	0.9%
Administrative Services	0.9%	7.8%	6.9%

	2011	2016	% change
Commercial Sectors	3.1%	4.0%	0.9%
All Sectors	2.4%	2.6%	0.1%

Source: ABS Census of Population and Housing, 2011 and 2016

Over time, it is anticipated that the incidence of persons within commercial office sectors that work from home will continue to increase. The assessment has assumed the following changes in the incidence of persons working from home:

- **2016 to 2026 period:** The incidence of persons working from home in commercial office sectors continues to increase at the same rate between 2011 and 2016 (i.e. increasing at 0.9% points in Rockhampton Regional Council over each five-year time period); and
- **2026 to 2041 period:** The incidence of persons working from home in commercial office sectors continues to increase at the slower rate (i.e. increasing at 0.5% points in Rockhampton Regional Council over each five-year time period).

8.1.3.2 Proportion of Employment to be Accommodated in Commercial Office Space

Our assessment has made the following assumptions relating to the proportion of employment in commercial office sectors to be accommodated in commercial office space:

- Sole traders: 50.0% of sole traders will require commercial office space; and
- Employing businesses: The proportion of workers in employing businesses requiring commercial office space has been adjusted downwards based on the assumptions regarding historical and projected incidences of persons working from home.

Based on the above assumptions, persons employed as sole traders and in employing businesses requiring commercial office space within the Rockhampton Regional Council is anticipated to increase from 5,401 workers in 2021 to 7,408 workers in 2041.

Table 8-8 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space , Rockhampton Regional Council, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	5	5	5	5	5
Internet Service Providers, Web Search Portals and Data Processing Services	4	5	7	8	8
Finance	75	34	19	14	14
Insurance and Superannuation Funds	35	22	17	16	17
Auxiliary Finance and Insurance Services	65	39	30	26	26
Property Operators and Real Estate Services	257	355	459	549	625
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	333	351	374	404	451
Computer System Design and Related Services	56	64	72	81	91
Public Administration	414	374	351	352	369
Medical and Other Health Care Services	518	616	708	792	866
Administrative Services	149	171	192	217	243
Total	1,911	2,036	2,233	2,464	2,716

	2021	2026	2031	2036	2041
Employment within Employing Businesses					
Internet Publishing and Broadcasting	8	7	6	6	6
Internet Service Providers, Web Search Portals and Data Processing Services	14	20	25	29	30
Finance	34	15	8	6	6
Insurance and Superannuation Funds	14	9	7	6	6
Auxiliary Finance and Insurance Services	30	19	14	12	12
Property Operators and Real Estate Services	128	194	257	309	352
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	788	796	816	864	956
Computer System Design and Related Services	108	112	118	127	142
Public Administration	984	911	875	885	925
Medical and Other Health Care Services	1,158	1,372	1,576	1,759	1,913
Administrative Services	226	254	276	309	344
Total	3,490	3,708	3,979	4,311	4,693
Total Employment					
Internet Publishing and Broadcasting	13	12	11	11	11
Internet Service Providers, Web Search Portals and Data Processing Services	17	25	32	37	39
Finance	109	49	27	20	19
Insurance and Superannuation Funds	49	31	24	22	23
Auxiliary Finance and Insurance Services	94	58	44	38	38
Property Operators and Real Estate Services	385	548	716	858	977
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	1,121	1,147	1,190	1,268	1,408
Computer System Design and Related Services	164	176	190	208	233
Public Administration	1,398	1,285	1,226	1,237	1,295
Medical and Other Health Care Services	1,676	1,988	2,284	2,551	2,779
Administrative Services	375	424	468	525	587
Total	5,401	5,743	6,212	6,775	7,408

Source: CDM Smith Analysis, 2021

The number of workers anticipated to be accommodated in commercial office space by catchment is anticipated to increase as follows:

- Rockhampton North: increasing from 1,888 workers in 2021 to 2,691 workers in 2041;
- Rockhampton South: increasing from 3,208 workers in 2021 to 4,008 workers in 2041;
- Mount Morgan: increasing from 106 workers in 2021 to 234 workers in 2041;
- Gracemere: increasing from 141 workers in 2021 to 209 workers in 2041;
- Bouldercombe: increasing from 40 workers in 2021 to 140 workers in 2041; and
- Rockhampton Regional - West: increasing from 17 workers in 2021 to 47 workers in 2041.

Table 8-8 summarises the total employment in commercial offices sectors requiring commercial office space by catchment between 2021 and 2041 by catchment with Appendix G providing further detail.

Table 8-9 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space , Catchments, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Traders Employment					
Rockhampton North	664	664	664	664	664
Rockhampton South	1,106	1,166	1,264	1,378	1,510
Mount Morgan	7	10	15	18	21
Gracemere	93	98	105	116	128
Bouldercombe	17	27	37	45	52
Rockhampton Regional – West	8	10	13	15	18
Employment within Employing Businesses					
Rockhampton North	1,208	1,301	1,413	1,555	1,705
Rockhampton South	2,102	2,151	2,246	2,385	2,577
Mount Morgan	100	135	167	193	213
Gracemere	48	62	71	77	81
Bouldercombe	23	44	62	77	88
Rockhampton Regional – West	9	14	20	24	29
Total Employment					
Rockhampton North	1,872	1,966	2,077	2,219	2,369
Rockhampton South	3,208	3,316	3,509	3,762	4,088
Mount Morgan	106	145	182	211	234
Gracemere	141	160	176	193	209
Bouldercombe	40	71	100	122	140
Rockhampton Regional – West	17	24	33	40	47

Source: CDM Smith Analysis (2021)

8.1.4 Projected Commercial Office Floor Space Demand

To convert employment projections to commercial office floor space demand, the analysis has assumed the following floor space provision:

- Sole traders: floor space requirement of 25sqm per worker; and
- Employing Businesses: floor space requirement of 15sqm per worker.

Based on the above assumptions, commercial office floor space demand in Rockhampton Regional Council is projected to increase from 100,114sqm in 2021 to 138,283sqm in 2041, with medical and other health care services and public administration sectors the major drivers of demand.

Table 8-9 reports projected demand for commercial office floor space in Rockhampton Regional Council under employment projections between 2021 and 2041.

Table 8-10 Projected Commercial Office Floor Space Demand (sqm), Rockhampton Regional Council, 2021-2041

	2021	2026	2031	2036	2041
Sole Trader Demand (Sqm)					
Internet Publishing and Broadcasting	120	126	128	130	134
Internet Service Providers, Web Search Portals and Data Processing Services	93	137	175	199	212
Finance	1,881	847	476	353	343
Insurance and Superannuation Funds	868	557	437	403	417
Auxiliary Finance and Insurance Services	1,621	976	748	640	642
Property Operators and Real Estate Services	6,421	8,866	11,467	13,722	15,637
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	8,321	8,779	9,340	10,107	11,281
Computer System Design and Related Services	1,403	1,597	1,803	2,019	2,273
Public Administration	10,356	9,349	8,767	8,797	9,228
Medical and Other Health Care Services	12,962	15,388	17,693	19,802	21,645
Administrative Services	3,719	4,270	4,798	5,416	6,077
Total	47,764	50,893	55,831	61,588	67,891
Employing Businesses Demand (Sqm)					
Internet Publishing and Broadcasting	119	109	94	86	86
Internet Service Providers, Web Search Portals and Data Processing Services	204	299	380	429	454
Finance	508	224	123	89	86
Insurance and Superannuation Funds	207	129	99	90	93
Auxiliary Finance and Insurance Services	445	279	213	181	181
Property Operators and Real Estate Services	1,921	2,906	3,857	4,642	5,279
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	11,815	11,938	12,243	12,958	14,345
Computer System Design and Related Services	1,616	1,677	1,767	1,911	2,124
Public Administration	14,762	13,665	13,124	13,271	13,882
Medical and Other Health Care Services	17,366	20,584	23,643	26,380	28,702
Administrative Services	3,387	3,804	4,140	4,629	5,159
Total	52,349	55,614	59,683	64,665	70,392
Total Demand (sqm)					
Internet Publishing and Broadcasting	238	235	222	215	220
Internet Service Providers, Web Search Portals and Data Processing Services	297	437	555	627	666
Finance	2,390	1,070	598	442	430
Insurance and Superannuation Funds	1,075	686	536	493	510
Auxiliary Finance and Insurance Services	2,066	1,255	961	820	823
Property Operators and Real Estate Services	8,342	11,772	15,324	18,364	20,916

	2021	2026	2031	2036	2041
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	20,136	20,716	21,583	23,065	25,626
Computer System Design and Related Services	3,020	3,274	3,570	3,930	4,397
Public Administration	25,118	23,015	21,890	22,068	23,111
Medical and Other Health Care Services	30,328	35,972	41,336	46,182	50,346
Administrative Services	7,106	8,074	8,938	10,045	11,236
Total	100,114	106,507	115,514	126,254	138,283

Source: CDM Smith Analysis, 2021

Similarly, based on the above assumptions, commercial office floor space demand by catchment is anticipated as follows:

- Rockhampton North: increasing from 35,120sqm in 2021 to 50,230sqm in 2041;
- Rockhampton South: increasing from 59,188sqm in 2021 to 76,421sqm in 2041;
- Mount Morgan: increasing from 1,666sqm in 2021 to 3,719sqm in 2041;
- Gracemere: increasing from 3,040sqm in 2021 to 4,421sqm in 2041;
- Bouldercombe: increasing from 762sqm in 2021 to 2,614sqm in 2041; and
- Rockhampton Regional - West: increasing from 399sqm in 2021 to 878sqm in 2041.

Table 8-10 reports projected demand for commercial office floor space by catchment under employment projections between 2021 and 2041, with Appendix H providing further detail.

Table 8-11 Projected Commercial Office Floor Space Demand (sqm), Catchment, 2021-2041

	2021	2026	2031	2036	2041
Sole Trader Businesses					
Rockhampton North	17,002	18,125	19,990	22,279	24,656
Rockhampton South	27,654	29,143	31,592	34,440	37,761
Mount Morgan	172	258	370	458	526
Gracemere	2,320	2,438	2,623	2,890	3,209
Bouldercombe	416	679	932	1,134	1,297
Rockhampton Regional - West	200	249	324	386	441
Employing Businesses					
Rockhampton North	18,118	19,522	21,196	23,328	25,573
Rockhampton South	31,534	32,260	33,685	35,770	38,660
Mount Morgan	1,493	2,022	2,503	2,895	3,193
Gracemere	720	930	1,070	1,157	1,212
Bouldercombe	345	663	934	1,148	1,317
Rockhampton Regional - West	139	217	296	367	437
All Businesses					
Rockhampton North	35,120	37,648	41,186	45,607	50,230
Rockhampton South	59,188	61,403	65,277	70,210	76,421

	2021	2026	2031	2036	2041
Mount Morgan	1,666	2,280	2,874	3,352	3,719
Gracemere	3,040	3,368	3,692	4,048	4,421
Bouldercombe	762	1,342	1,867	2,283	2,614
Rockhampton Regional - West	339	466	620	754	878

Source: CDM Smith Analysis (2021)

8.1.5 Supply Demand Balance

The supply demand balance assessment is used to determine the balance of provision and expected demand for commercial floor space within the broader Region over the projection horizon (2021 to 2041). The supply demand balance assessment has been calculated with reference to the existing provision of commercial floor space. As discussed in Section 4, there was an estimated 118,815sqm of commercial floor space in Rockhampton Regional Council as of 2021. Commercial floor space was largely concentrated in the Rockhampton South catchment which captures the Rockhampton CBD.

Based on the existing supply and projected demand (detailed in the proceeding section), the assessment shows a shortfall in commercial office supply from 2036 (demand for further 7,439qm). The shortfall is anticipated to reach 19,468sqm by 2041.

In the 2021 to 2031 period, the analysis suggests that there is an oversupply of commercial office floor space provision within Rockhampton Regional Council, which is likely attributable to businesses occupying larger floor plates than they require based on tenancy availability or ensuring sufficient capacity within their tenancy to expand without needing to relocate.

Table 8-11 reports the findings of the supply demand balance of commercial floor space provision within Rockhampton Regional Council for the 2021 to 2041 period.

Table 8-12 Commercial Office Floorspace Supply Demand Balance (sqm), Rockhampton Regional Council, 2021-2041

Supply Demand Balance	2021	2026	2031	2036	2041
Existing Supply (2021 levels)	118,815	118,815	118,815	118,815	118,815
Demand	100,114	106,507	115,514	126,254	138,283
Supply-Demand Balance	18,701	12,308	3,300	-7,439	-19,468

Note: A negative supply demand balance suggests a shortage of floor space

Source: CDM Smith Estimates

Section 9 Stakeholder Consultation

To inform the Rockhampton Commercial Centres Study, stakeholder consultation was undertaken with a number of key representatives within Rockhampton Regional Council, including shopping centre management, real estate agents, industry bodies and key landholders within Rockhampton. The key outcomes of stakeholder consultation have been summarised under a number of broad themes, namely:

- **Positive sentiment** – All stakeholders were of the view that it was an ideal time to undertake the study and generally expressed that the region was in an upswing with a number of major projects including Shoalwater Bay, Rookwood Weir and the Rockhampton Ring Road. However, some stakeholders identified that these major projects, whilst boosting business confidence within the region, typically translated to additional demand for residential and industrial land, as opposed to retail and commercial office floor space.

Stakeholders were positive about the opportunities that the new Art Gallery could bring and assist in attracting people back to the Rockhampton CBD, although some were of the view that insufficient parking was provided as part of the redevelopment;

- **CBD ownership** – Stakeholders indicated that the Rockhampton CBD was owned by few landholders which represented both a potential impediment and opportunity, with some landholders unwilling to invest in improved facades or internal fitouts to attract tenants;
- **Retail floor space provision in Rockhampton CBD** – Stakeholders were of the view that there was sufficient retail floor space provision in the Rockhampton CBD, and perhaps an oversupply of provision. A stakeholder indicated that success within the comparison retail space was still possible but required a bespoke approach – i.e. targeted buying to suit the demographic of Rockhampton. Stakeholders were of the view that commercial office tenancies were easier to lease than retail tenancies, with a suggestion made to allow flexibility for tenancies to shift between retail and commercial office uses. Stakeholders also recognised that there had been changes in the retail landscape more generally (e.g. online retail), which made comparison retail challenging in any market. It was also identified that a number of tenancies sat vacant for long periods, with larger tenancies typically the most difficult to fill.

Stakeholders were generally positive regarding the prospect of the provision of an IGA / limited line supermarket within the CBD but did not see the need for an additional full line supermarket in the CBD. Landholders within the CBD expressed some reluctance in fitting out tenancies to accommodate tenants, with tenants sometimes pulling out of leasing agreements at the last minute. Headricks Lane and the Boathouse were commonly cited as examples of successful retail tenancies within Rockhampton in recent years. A preference for national tenants was expressed by some stakeholders as these businesses were typically more stable, although locally owned tenancies was seen as preferential for butchers and cafes. Stakeholders expressed a preference to see additional cafes and restaurants along the riverfront of the CBD, but it was also identified that these businesses offered limited trading hours, particularly on Sundays;

- **Commercial office floor space provision** – Stakeholders saw more opportunities within the commercial office sector, with the health sector (e.g. general practitioners and allied health professionals such as dentists and physiotherapists) often identified as a key prospect for growth, including by shopping centre managers. Stakeholders had also identified that commercial office tenancies were increasingly interested in smaller floor plates in response to reduced staff numbers post COVID, which had represented an opportunity for businesses to review their operations and downsize their workforce. Sentiment was positive regarding the serviced office space run by Rockhampton Regional Council on Quay Street and the provision of additional serviced office space by either Council or a private operator was identified as a potential future opportunity. One stakeholder indicated that he was able to fill his commercial office tenancies by targeting national tenants and providing a fitout that suited their needs, including on-site parking for customers and staff;

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- **Impacts of COVID-19** – Stakeholders were of the view that COVID-19 typically did not lead to the closure of businesses within Rockhampton, with businesses that closed typically already recording declining business performance prior to COVID-19. Jobkeeper was cited as an issue by some stakeholders, due to the inability to attract staff, particularly within the hospitality sector;
 - **In centre residential in Rockhampton CBD** – Stakeholders could see the merit of allowing for additional in-centre residential development within the CBD but were unsure of the market acceptance of in-centre residential development, particularly if it was not waterfront. Stakeholders were of the view that waterfront multi-unit development had been well received in Rockhampton and was predominantly purchased by locals. It was identified that the residential market was currently strong within Rockhampton, with residential vacancy rates currently less than 1%. East Street was identified as a potential location to expand in-centre residential provision;
 - **Car parking** – Car parking was a contentious issue with stakeholders, with some of the view that insufficient parking was provided within Rockhampton CBD, with workers having to move their cars throughout the day due to time restrictions. Stakeholders also made mention of the Kern Arcade car park, which had previously been available for both short term and long term parking but was now only available for long term parking since the closure of the centre for a nominal fee.

Section 10 Recommendations

Key Issues

- There are significant vacancies across retail and office space in the CBD which is unlikely to be filled based on projected demand to 2041. This creates a challenging environment for Rockhampton Regional Council's efforts to revitalise the city centre. However, the CBD Redevelopment Framework has identified a range of significant initiatives particularly within the core precinct.
- There are also significant vacancies in some local and specialised centres. The latter is associated with a reduction in demand for bulky goods space due to a shift towards online retailing and other trends within the sector, particularly in the comparison shopping and bulky goods retail sub-categories.
- Vacancy rates in the centres hierarchy have generally increased since the previous commercial centres study, with our assessment indicating that these vacancies are unlikely to be fully taken up by 2041. While there will be demand for additional supermarkets (refer below), there is limited demand for additional commercial space or other forms of retail space across the whole network (and particularly within those centres where highest vacancies occur).
- Our inventory identified that the proportion of floor space that was described as poor quality was mostly concentrated within local centres and neighbourhood centres, particularly Mount Morgan, Frenchville and Kawana. However, it also occurred within large parts of the CBD. Stakeholder consultation identified that larger vacant tenancies (such as those that occur in the CBD) were typically most difficult to fill. In the commercial office sector, a number of businesses had reduced their required floor plates.
- Landholders in the CBD were not always willing to invest in improved facades or internal fitouts to attract tenants and, anecdotally, lacked financial incentive to do so.
- Within the 2041 horizon, the outlook for additional supermarket floor space is as follows:
 - North Rockhampton: Our analysis suggests demand for an additional full line supermarket within this catchment after 2031 (or before if the proposed Aldi on Yaamba Road does not proceed). The assessment also suggests that demand exists for an additional limited line supermarket over the projection horizon.
 - Gracemere: Our analysis suggests demand for an additional full line supermarket would manifest in the 2031 to 2036 period, with the potential also for an additional limited line supermarket over the projection horizon.
 - Remainder of Rockhampton Regional Council area: Our analysis suggests whilst demand for additional supermarket floor space is anticipated by 2041, the level of demand is not sufficient to support an additional full line supermarket.
- Whilst there are vacant tenancies within the Parkhurst district centre, there is insufficient capacity to accommodate another full line supermarket. Additionally, it would be difficult and unlikely that a further supermarket would be established in the North Rockhampton major centre. This indicates that provision of additional supermarkets within North Rockhampton would need to occur on an alternative site.
- In the southern catchment, there is vacant land within the Gracemere district centre and opportunities within the CBD or within the Gladstone Road specialised centre (on Lot 1 SP161848 – the Fantastic Furniture site adjacent to the existing Aldi) for a possible future supermarket (these are the locations supported by the current planning scheme settings). However, our assessment suggests limited need to allow for a supermarket within the Gladstone Road specialised centre.
- Beyond a need for supermarket floor space, there will be little or no need for additional retail floor space up to and beyond 2041. There may be a modest demand for additional office floor space after 2036, which is likely to be partially met by businesses occupying vacant tenancies within the Rockhampton CBD.

Current Planning Scheme Settings

- The current planning scheme provisions have proven to be clear and robust, directing all significant new office uses to the CBD and “large scale retail” (meaning department and discount department stores to either the CBD or the major centre (North Rockhampton)).
- The planning scheme is already reasonably permissive within the centre zones in terms of mix of uses anticipated and their associated levels of assessment, although some adjustments may be warranted for emerging activities and to increase opportunities for in centre residential development (discussed further below).
- Full line supermarkets are directed to district centres and above, with the planning scheme anticipating a new supermarket in the Parkhurst district centre (which has since occurred) and anticipating a further supermarket to service the southern catchment which it directs to either Gracemere or the CBD (and specifically excluding Allenstown). It also allows for a supermarket on two sites in the Gladstone Road specialised centre, one of which has subsequently been taken up by Aldi.
- A second Aldi was approved in the Yaamba Road specialised centre despite it conflicting with the planning scheme, reflecting the growing need over the life of the planning scheme in the northern catchment.
- While continued flexibility for a range of activities within centre zones is supported, there is no need for further expansion of centre zoned land, other than for limited cases where some lower order centre boundaries could be rationalised to reflect long standing commercial uses that form a logical part of the centre (discussed further below).

Key Recommendations for the Planning Scheme

Confirmation of the role of each level of centre and recommendations for refinements and changes to current planning scheme settings are contained in Table 10-1.

Other Opportunities to Enhance Centre Performance

Non-regulatory opportunities have also been identified to enhance centre performance within Rockhampton Regional Council, which are summarised below in Table 10-2.

Table 10-1 Recommendations for the Centres Hierarchy

Centre	Focus	Changes to current settings and other recommendations
<p>Principal centre Rockhampton Central Business District</p>	<p>This study confirms and supports the current scheme intentions for the CBD. It is to be the primary business centre for the region with the highest concentration of commercial office, lifestyle, entertainment and cultural uses. Important character and heritage values are to be retained.</p> <p>It should accommodate low-medium to high density residential, tourist and short accommodation. Active frontages should be provided, and especially focussed on the core area, together with shaded footpaths, street trees and other pedestrian facilities. It should be well designed, safe and highly accessible and served with all urban infrastructure.</p> <p>It will also form the primary destination and interchange hub for all modes of road and local area public transport.</p> <p>Vacancy rates are to be kept low by retaining current settings which avoid unnecessary expansion of lower order centres and direct larger scale offices (over 500m²) to the CBD core. The provision of a limited line supermarket in the CBD should continue to be supported,</p> <p>Flexibility should be maintained for the expansion of additional food and dining, entertainment and recreational opportunities throughout the CBD, and especially in the Quay Street precinct.</p>	<ul style="list-style-type: none"> • In order to further promote in centre residential opportunities, residential uses could be allowed at ground level (avoiding triggers to higher levels of assessment). The only exception would be in the central “high street” focus area along Denham and East Street (as identified in the CBD Redevelopment Framework. In other locations throughout the CBD, ground level residential uses could be accommodated without substantively threatening activation of casual surveillance outcomes provided they are not excessively wide or orientated away from the street (for example, ensuring balconies overlook the street). • Both short term and long term residential uses could be contemplated in the Denison Street precinct (where they are currently not intended). This may require further detailed review of the current use mix, noting the potential for amenity concerns. However, these issues could be addressed on a site by site basis in order to support a more vibrant transformation of the precinct. • The provision of a limited line supermarket in the CBD is supported. This may require a change to clause (25) in the strategic framework which implies a full line supermarket should locate in the CBD. • Review of car parking rates to ensure reuse and replacement of existing buildings is not penalised where car parking rates may necessitate loss of GFA). This study has not included a car parking or transport strategy, however our high level appraisal is that while car parking rates are not unduly high, there is potential for greater tolerance for lower levels of parking in the CBD, especially in the core precinct. • Include encouragement for craft breweries or distillers and artisan food/craft producers to occur within the CBD and to collocate with food and drink outlets and entertainment facilities. • Align precinct provisions and diagrams with the CBD Redevelopment Framework and streetscape manual. We do not believe this would require substantive changes, although Council could consider: <ul style="list-style-type: none"> - Defining a new smaller core precinct and with the balance as frame. This would primarily relate to street-facing treatment rather than reflect any change in land use mix of built form aspects. It would be the area where Council should continue to require ground level active uses, while more flexibility for ground level residential and commercial can be created for other areas.

Centre	Focus	Changes to current settings and other recommendations
		<ul style="list-style-type: none"> - Some adjustment of elements shown in precinct figures such as active edges, streetscape treatment and function, public realm focus areas, active transport circulation (whether or not precincts are altered). - Making provision for new elements as outlined in the CBD Redevelopment Framework such as the intermodal transport facility and new jetty. • No other changes to existing precinct are required by the framework nor the recommendations from this study. However, future urban design reviews may identify opportunities to refine built form requirements. • Consider the introduction of an infrastructure charges waiver to incentivise in-centre residential development in the Rockhampton CBD. • Do not extend the centre zone designation to include any existing out of zone commercial and retail activity surrounding the CBD to encourage redevelopment for residential purposes to the greatest extent possible (see recommendations for out of centre development below).
<p>Major centre North Rockhampton</p>	<p>This study confirms and supports the current scheme intentions for the Rockhampton’s major centre to accommodate higher order retail and commercial uses (other than large scale offices), with a mix of dining, entertainment and residential opportunities</p> <p>Urban design parameters should continue to focus on providing street oriented buildings, continuous commercial facades, shaded footpaths, street trees and other pedestrian facilities.</p> <p>It should create vibrant focal points for the community and interchange hubs for modes of transport.</p> <p>It should be well designed, safe and highly accessible and served with all urban infrastructure.</p>	<ul style="list-style-type: none"> • Continue to direct large scale retail (such as department and discount department stores) is directed to the major centre as well as to the CBD and discourage large scale offices. No limits on retail or overall floor space are necessary for this centre within the area designated in order to protect the CBD because there is not real prospect of elevating the CBD retail offer to a higher level than North Rockhampton. However, no further outward expansion of the centre is warranted. (Refer to recommendations under specialised centres below regarding the designation of out of centre commercial activities on High Street.) • Continue to allow for a wide range of other activities (including residential) as at present. There is no need to restrict this centre’s ability to add to its lifestyle/experience offer by limiting food and entertainment elements. These are unlikely to undermine the CBD, which will offer a different type of experience and would unnecessarily frustrate other desirable outcomes for this centre. • No change to current strategic framework or zone intentions are required.

Centre	Focus	Changes to current settings and other recommendations
<p>District centres</p> <p>Allenstown Gracemere Parkhurst</p>	<p>This study confirms and supports the current scheme intentions for the Rockhampton's district centres. These are full line supermarket anchored centres, with each supermarket generally serving a catchment of approximately 5,000 to 8,000 households.</p> <p>They provide a focus for weekly or fortnightly shopping trips including full line supermarkets. Flexibility should be provided to accommodate a mix of other uses including residential and food and beverage</p> <p>They should be well designed, safe and highly accessible and served with all urban infrastructure.</p>	<ul style="list-style-type: none"> • Continue to base these centres around weekly shopping needs, including full line supermarkets and limit the extent of office development. Retain current floor space triggers to impact assessment for retail and offices. • Direct a required new full-line supermarket (required over the medium term) serving the southern catchment to Gracemere, rather than allowing expansion of Allenstown (also removing support for a full line supermarket within the Gladstone Road specialised centre, as discussed in specialised centres below). • Some adjustment of current strategic framework and zone intentions will be required to update their intentions. Specifically: <ul style="list-style-type: none"> - Strategic framework outcome (30) and (32) should be revised/combined remove reference to a new supermarket in Parkhurst (Boundary Road) and indicate a second full line supermarket serving the southern catchment should locate in Gracemere district centre rather than Allenstown. - In the zone code, (f) should be revised to say a indicate that in the medium-long term, a second full line supermarket serving the southern catchment should locate in Gracemere district centre rather than Allenstown, although a further, limited line supermarket might be accommodated in Allenstown, with the potential for a limited line supermarket in the CBD should residential densities increase. - In the zone code (g) should be deleted (refer recommendations for Yaamba Road specialised centre below)
<p>Local centres</p> <p>Frenchville Farm Street Norman Road Mount Morgan and New centre at Parkhurst, William Palfrey Road (Lot 5 on SP238731)</p>	<p>This study confirms and supports the current scheme intentions for local centres as generally serving a local catchment of 3,000-5,000 households, providing a focus for convenience needs to serve the local catchment. This may include small convenience-based supermarkets.</p> <p>No additional local centres are required, beyond those that are already zoned or nominated for William Palfrey Road and Norman Road.</p> <p>Existing urban design and built form intentions for these centres are supported.</p>	<ul style="list-style-type: none"> • Continue to base these centres around convenience shopping needs, including small, convenience based supermarkets and limit the extent of office development. Retain current floor space triggers to impact assessment for retail and offices. • No change to current strategic framework or zone intentions are required.

Centre	Focus	Changes to current settings and other recommendations
<p>Neighbourhood centres</p> <p>Berserker Kawana Park Avenue Wandal and New centre at Gracemere South</p>	<p>This study confirms and supports the current scheme intentions for neighbourhood centres, which generally serve a catchment of around 1,500 households.</p> <p>The provide for day to day convenience needs, including small scale shops and personal services.</p> <p>No additional local centres are required, beyond those that are already zoned or nominated for Gracemere South.</p> <p>Existing urban design and built form intentions for these centres are supported.</p>	<ul style="list-style-type: none"> Continue to base these centres around convenience shopping needs and limit the extent of office development. Retain current floor space triggers to impact assessment for retail and offices. Current zone intentions should be revised to remove reference to small supermarkets – leaving the test in outcome (a) merely relating to convenience shopping for the immediate catchment. Retain the wording excluding full line supermarkets. No change to current strategic framework intentions are required. At the Berserker centre, consider expanding the local centre designation to longstanding commercial and low impact industry uses west of the centre on Elphinstone Street to accommodate changes of commercial activity while still enabling residential redevelopment.
<p>Specialised centres</p> <p>Gladstone Road George Street Musgrave Street Yaamba Road</p>	<p>This study has highlighted changes affecting specialised centres. They may continue to accommodate showrooms, outdoor sales, food and drink outlets that are highway focussed or small-scale and serving visitors and convenience shopping.</p> <p>The specialised centres may also accommodate trade based activities, warehousing and service and low impact industry. Residential redevelopment should be encouraged more extensively across the various precincts, in addition to indoor recreation activities to assist in transitioning vacant land and tenancies.</p>	<ul style="list-style-type: none"> Remove support for a full line supermarket within the Gladstone Road specialised centre (on Lot 1 SP161848 and Lot 1 SP191827), as any further supermarket provision is likely best met in South Rockhampton by Gracemere (This affects zone overall outcomes (4)(b) and (c). As there is insufficient capacity within the Parkhurst district centre to accommodate another full line supermarket, allow for a full line supermarket on a suitable site within the Yaamba Road specialised centre to meet future needs of the northern catchment. Continue to preclude large-scale offices and retailing (supermarkets, department stores, discount department stores or large-scale shopping centres, apart from the nominated site in the Yaamba Road precinct). Retain existing floor areas triggers for impact assessment. Continue to preclude further expansion of these centres into adjacent residential zones and outside the designated centre areas. However, in the Musgrave Street area, consider including existing commercial uses on the northern side of High Street (east of Ford Street) in the mixed use precinct of the specialised centre zone to allow some opportunities for commercial changes while encouraging residential redevelopment. Review settings for specialised centres to prioritise transition to residential where suitable (and remove requirements for ground level commercial activities) More broadly enable transitioning from bulky goods tenancies to trade based activities, warehousing, service and low impact industries as well as indoor

Centre	Focus	Changes to current settings and other recommendations
Out of centre development and other recommendations	<ul style="list-style-type: none"> • Apart from suggested rationalisation of some centre zone boundaries mentioned above, continue to articulate strong policies to prevent expansion of existing centres beyond zone land. • Retain non-industrial use limitations in industry zones. • Retain non-residential use limitations under the low density and high density residential zones (although adjust (h) in the low density zone to remove reference to “full line supermarkets”, saying instead new proposed centres meet the requirements for a neighbourhood centre and do not operate a higher order”. • In the low-medium density residential zone, revise overall outcomes to: <ul style="list-style-type: none"> - Retain allowance for highway oriented uses along Albert Street, although consider limiting this to existing commercial premises (preventing further spread of non residential activities); - Delete outcome (d) and the associated assessment level triggers which suggest offices up to 200m2 are acceptable. Rely instead on the general tests for non residential uses. - In the immediate vicinity of the CBD (the area bounded by George and Albert Streets), allow for reuse of existing non residential buildings, but preclude any further expansion or intensification of these activities. • Review industry threshold tables to avoid capturing craft breweries or other artisanal food/beverage producers as medium or high impact industry. 	<p>sport and recreation. This may include review of car parking rates, level of assessment triggers and built form requirements.</p>

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Table 10-2 Other Recommendations to Enhance Centre Performance in Rockhampton Context

Recommendation	Advantages / Disadvantages
Rockhampton Regional Council to educate external and internal stakeholders on the importance of the centres hierarchy and avoid approval of out of centre development	Enhanced understanding of importance of centres network by stakeholders Provide confidence to existing landholders and tenants in their investments, potentially incentivising redevelopment / upgrades to facades and fitouts, although this confidence is likely to establish in the medium to long term
Implement the strategies identified in the CBD Redevelopment Framework	Improved amenity and catalyst projects will encourage visitation and incentivise other redevelopment. Can come at significant cost to Council
Rockhampton Regional Council to target landholders with tenancies identified as poor quality, to identify their challenges and barriers to redevelopment / tenancy upgrades	Cost to Council is potentially limited to the diversion of Council staff's time from other projects, as opposed to significant upfront cost Key risk is that impacted landholders are unwilling to engage with Council, limiting future opportunities for redevelopment.
Rockhampton Regional Council to regularly monitor grant funding programs available that encourage activity within the CBD, promote these to the local business community and assist with grant funding applications	Cost to Council is potentially limited to the diversion of Council staff's time from other projects, as opposed to significant upfront cost Grant funding usually available within a narrow window and requires regular monitoring Significant effort likely required by both Council and applicant to ensure grant funding application is of required standard
<p>Identify opportunities to attract the Rockhampton population into the CBD during non-peak times, with initiatives such as the following to be considered:</p> <ul style="list-style-type: none"> • Outdoor movie events hosted by Council on Friday evening / weekends with a small admission fee to assist in covering costs • Group fitness classes for free / small fee to be run by Council • Produce and/or craft markets on a regular basis along the riverfront • Food trucks on a weekly / fortnightly / monthly basis along the riverfront 	<p>Initiatives can be delivered at relatively little cost to Council and can enliven the CBD during non-peak times</p> <p>Attendance at events is not guaranteed and potential risk that events run at a loss</p> <p>Surrounding retail tenancies see events as a direct competitor, as opposed to an opportunity to attract business before or after attendance at events</p>
Undertake discussions with State Government or engage in a public private partnership to identify and deliver urban renewal opportunities within the Rockhampton CBD to encourage in-centre residential development beyond the waterfront (e.g. Council owned site on William Street)	<p>Opportunity for Council to acquire a strategic site for redevelopment, although this would likely come at significant cost</p> <p>Ability to demonstrate to the market that residential development is feasible beyond the riverfront</p> <p>Opportunity to deliver a typology to market which conveys Council's desire for residential development in terms of urban design outcomes</p>

Recommendation	Advantages / Disadvantages
Investigate placemaking and streetscape improvement opportunities within Rockhampton Regional Council, with a focus on centres that have high vacancy rates	<p>Improved amenity is anticipated to encourage visitation and foot traffic to a centre</p> <p>Can come at significant cost to Council</p> <p>No guarantee that streetscape improvements will encourage investment by landholders, however improvements will provide an uplift of areas, ready for investment.</p>
Rockhampton Regional Council to facilitate regular meetings with tenants, centre managers and key landholders throughout Rockhampton Regional Council to discuss key opportunities and challenges	<p>Allows for an up-to-date understanding of key issues and challenges facing commercial centres</p> <p>Business community positive and willing to engage</p> <p>Facilitating regular meetings does not guarantee attendance, although sentiment of business community within region suggests this may not be a challenge, at least in the short term</p> <p>Opportunities identified by attendees may be difficult to achieve as they are beyond the scope of Council's responsibility (e.g. unruly behaviour in the CBD in the evening) but represent an opportunity for the broader business community to lobby for change, as opposed to landholders / tenants individually.</p>
Consider strategies to support landowners that have upgraded and cared for their tenancy that is vacant.	<p>Relatively low cost program to Council and allows for the identification of emerging industry sectors that are looking for affordable space</p> <p>Assists in the activation of vacant tenancies</p> <p>No guarantee program would be taken up by the business community</p>
Consideration of amendments to Development Incentives Policy – 1 January 2021 to 31 December 2021 to encourage in-centre residential development in Rockhampton CBD, with a cap on the maximum number of units eligible per development and a fixed cap on the total dollar allocation	<p>Policy lever represents an opportunity to incentivise in-centre residential development</p> <p>Infrastructure charges rebate could be targeted within a specific precinct in the CBD, or across the CBD more broadly</p> <p>Infrastructure capacity should be sufficient to support redevelopment as within a brownfield as opposed to greenfield area</p> <p>Timing is ideal due to relatively low vacancy rates and recent success in marketing other attached dwelling developments in the CBD</p> <p>Expense represents lost revenue to Council, as opposed to an upfront cost</p>
Consideration of amendments to Development Incentives Policy – 1 January 2021 to 31 December 2021 to provide additional incentives for selected uses in the CBD, as opposed the Priority Infrastructure Area (PIA) within Rockhampton Regional Council more broadly.	<p>Policy lever represents an opportunity to incentivise priority land uses to Council, with incentives greater in the CBD than within the remainder of the Priority Infrastructure Area (PIA)</p> <p>Infrastructure capacity should be mostly sufficient to support redevelopment</p> <p>Expense represents lost revenue to Council, as opposed to an upfront cost</p>

Recommendation	Advantages / Disadvantages
Collate and present key data that encourages and supports business investment, particularly within the Rockhampton CBD, such as data relating to foot traffic, number of workers and in-centre residential population	<p>Provision of clear and easily understood data can be compiled by internal agencies within Council</p> <p>Establishment of a prospectus can be an effective marketing tool to promote the region to a broader market (i.e. beyond Rockhampton Regional Council) and facilitate investment</p> <p>Provision of key data can enhance business confidence locally and help support investment decisions of businesses</p>
Proactively identify, evaluate and facilitate redevelopment opportunities for key sites in commercial centres	<p>Regular monitoring of opportunities by Council allows for the identification of opportunities as they arise</p> <p>Opportunity for Council to identify redevelopment sites and market to the broader business community</p> <p>Potential to leverage previous investments made by Council, such as along the riverfront (Quay Street), the Art Gallery and streetscaping improvements in the CBD</p> <p>Purchase of strategic sites by Council likely at significant cost</p>
Review development and rates incentives available to support redevelopment within the CBD	<p>Consideration of development and rates incentives more broadly act as a lever to facilitate / encourage investment</p> <p>Development incentives can be structured to ensure costs represent lost revenue to Council, as opposed to significant upfront costs</p>
Review car parking and public transport options for commercial centres, including public transport options such as a bus interchange within the CBD	<p>Provides confidence to local business community that their concerns regarding parking are being appropriately considered</p> <p>Review provides opportunity to also identify areas to prioritise for streetscaping and public domain improvements</p> <p>Ability to provide public transport to the CBD has the potential to reduce reliance on private motor vehicle travel to the CBD</p>

Section 11 References

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Section 12 Appendices

NOT COUNCIL POLICY



Appendix A Socio Economic Profile and Employment Trends by Catchment

2016 Census

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Table 12-1 Socio-Economic Profile – Rockhampton LGA, Central Queensland SA4 and Queensland, Latest Censuses

	Rockhampton LGA			Central Queensland SA4			Queensland		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Ave. Annual Population Growth (%)	-	1.2%	0.8%	-	1.7%	0.9%	-	2.1%	1.7%
Age Distribution									
0-14 years	21.7%	21.3%	20.8%	23.0%	22.2%	21.6%	20.7%	20.2%	19.4%
15-24 years	15.1%	14.5%	13.7%	13.7%	13.3%	12.5%	13.8%	13.6%	13.0%
25-34 years	12.4%	13.5%	13.9%	13.0%	13.4%	13.6%	13.4%	13.6%	13.8%
35-44 years	13.6%	12.7%	12.0%	14.9%	14.0%	13.2%	14.7%	14.3%	13.4%
45-54 years	13.4%	13.4%	13.0%	14.3%	14.4%	14.0%	13.8%	13.6%	13.4%
55-64 years	10.2%	10.9%	11.6%	10.4%	11.2%	12.0%	11.2%	11.6%	11.8%
65+ years	13.7%	13.7%	15.0%	10.9%	11.4%	13.1%	12.4%	13.1%	15.3%
Average age (years)	37.0	37.2	38.0	35.8	36.4	37.5	37.2	37.6	38.8
Aboriginal and/or Torres Strait Islander	5.9%	6.4%	7.4%	4.6%	5.0%	5.7%	3.3%	3.6%	4.0%
Household Type (% of dwellings)									
Couple families with children	28.2%	28.1%	26.8%	31.0%	30.3%	28.5%	29.4%	29.5%	28.7%
Couple families without children	24.6%	24.7%	24.1%	26.0%	25.8%	25.2%	26.0%	26.6%	25.9%
Single parent family	12.4%	12.1%	12.7%	9.7%	9.4%	9.9%	10.5%	10.7%	10.7%
Lone person households	23.5%	23.7%	24.3%	20.4%	20.1%	21.9%	21.0%	21.4%	21.7%
Average household size	2.7	2.6	2.6	2.6	2.6	2.6	2.6	2.6	2.6
Household Finances									
% of households fully owning home	32.6%	29.1%	27.5%	31.7%	28.8%	27.1%	30.4%	28.4%	27.4%
% of households purchasing home	29.8%	31.2%	31.3%	30.5%	31.1%	30.8%	31.4%	32.6%	31.4%
% of households renting	29.8%	31.5%	31.8%	30.0%	31.3%	31.7%	30.0%	32.0%	32.2%

	Rockhampton LGA			Central Queensland SA4			Queensland		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Average weekly household income ⁴	\$1,073	\$1,416	\$1,541	-	\$1,639	\$1,707	\$1,202	\$1,501	\$1,699
Average monthly housing loan repayment	\$1,128	\$1,735	\$1,707	\$1,274	\$1,945	\$1,898	\$1,470	\$2,034	\$1,958
Average weekly rent payment	\$159	\$240	\$267	\$163	\$253	\$249	\$222	\$302	\$337
Average housing costs (as a % of income)	11.6%	14.2%	13.5%	-	13.3%	12.5%	14.4%	16.6%	14.7%
Socio – Economic Index (IRSD)									
Decile 1	-	13.5%	17.4%	-	8.4%	11.3%	-	8.5%	9.3%
Decile 2	-	19.8%	22.3%	-	10.4%	15.2%	-	10.0%	10.7%
Decile 3	-	14.2%	17.3%	-	12.9%	13.7%	-	10.4%	10.7%
Decile 4	-	11.1%	12.2%	-	10.8%	15.6%	-	10.4%	10.6%
Decile 5	-	10.5%	8.5%	-	10.9%	12.3%	-	10.8%	10.6%
Decile 6	-	11.1%	5.9%	-	13.0%	7.8%	-	11.1%	10.5%
Decile 7	-	8.1%	5.1%	-	12.5%	9.7%	-	10.4%	10.6%
Decile 8	-	3.4%	4.8%	-	8.0%	8.0%	-	10.3%	10.5%
Decile 9	-	3.5%	4.3%	-	7.6%	4.9%	-	8.9%	8.5%
Decile 10	-	4.7%	2.2%	-	5.2%	1.0%	-	8.3%	7.2%
Labour Market									
Full-time employment (% labour force)	61.9%	62.8%	57.8%	64.4%	65.0%	59.3%	61.6%	60.0%	57.7%
Part-time employment (% labour force)	26.6%	25.4%	27.9%	24.6%	24.1%	26.6%	27.7%	28.2%	29.9%
Total employment (% labour force)	94.4%	94.7%	90.8%	95.4%	95.6%	91.3%	95.3%	93.9%	92.4%
Unemployment rate (% labour force)	5.6%	5.3%	9.2%	4.6%	4.4%	8.7%	4.7%	6.1%	7.6%
Participation rate (% of population > 15 years)	59.2%	61.4%	59.8%	63.0%	64.3%	61.8%	61.8%	62.8%	61.0%
Qualifications									
% of persons with a non-school qualification	30.2%	36.0%	40.7%	32.8%	38.0%	42.5%	37.6%	43.3%	48.3%

⁴ Note: The Australian Statistical Geography Standard (ASGS) boundaries for Rockhampton in 2016 align with the following 2006 Australian Standard Geographical Classification (ASGC) and 2011 ASGS boundaries: Mount Morgan SLA, Fitzroy – Pt A SLA, Fitzroy – Pt B SLA and Rockhampton SLA. Meanwhile, the 2016 ASGS boundary for Central Queensland SA4 is equivalent to the 2011 ASGS boundary for Fitzroy SA4.

	Rockhampton LGA			Central Queensland SA4			Queensland		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
% of persons with Bachelor or higher	9.5%	11.0%	11.9%	9.0%	10.3%	11.4%	13.1%	11.7%	18.3%
% of persons with Diploma	4.3%	5.1%	6.0%	4.5%	5.4%	6.2%	6.6%	7.5%	8.7%
% of persons with Certificate	16.5%	19.9%	22.8%	19.3%	22.3%	24.9%	17.9%	19.9%	21.3%
Occupation									
Upper White Collar									
Managers	9.5%	8.7%	9.0%	12.1%	11.1%	11.2%	12.4%	12.0%	12.1%
Professionals	14.9%	15.6%	16.1%	13.0%	13.6%	14.1%	17.1%	18.9%	19.8%
<i>Subtotal</i>	24.4%	24.3%	25.1%	25.1%	24.7%	25.4%	29.5%	31.0%	31.9%
Lower White Collar									
Community & Personal Service Workers	9.7%	10.5%	12.4%	7.9%	8.4%	10.2%	9.1%	10.0%	11.3%
Clerical and Admin Workers	14.9%	14.2%	13.1%	12.7%	12.5%	11.8%	14.8%	14.7%	13.6%
Sales Workers	10.4%	9.5%	9.9%	8.7%	8.2%	8.8%	10.4%	9.8%	9.7%
<i>Subtotal</i>	35.1%	34.2%	35.4%	29.2%	29.1%	30.7%	34.2%	34.4%	34.7%
Upper Blue Collar									
Technicians & Trades Workers	16.8%	17.2%	16.5%	18.5%	18.9%	18.2%	15.4%	14.9%	14.3%
<i>Subtotal</i>	16.8%	17.2%	16.5%	18.5%	18.9%	18.2%	15.4%	14.9%	14.3%
Lower Blue Collar									
Machinery Operators & Drivers	8.2%	9.4%	9.0%	11.8%	12.9%	11.8%	7.2%	7.3%	6.9%
Labourers	13.9%	12.9%	12.6%	13.5%	12.4%	12.4%	11.9%	10.6%	10.5%
<i>Subtotal</i>	22.1%	22.4%	21.6%	25.3%	25.3%	24.2%	19.1%	17.9%	17.5%
Employment by Industry (% of employees)									
Agriculture, forestry & fishing	2.0%	1.6%	2.0%	5.7%	4.5%	5.1%	3.4%	2.7%	2.8%
Mining	2.3%	4.1%	5.1%	6.6%	8.7%	8.7%	1.7%	2.6%	2.3%
Manufacturing	9.3%	8.2%	6.0%	10.7%	9.6%	7.3%	9.9%	8.4%	6.0%
Electricity, gas, water & waste services	2.8%	2.8%	2.8%	2.3%	2.4%	2.6%	1.0%	1.2%	1.1%
Construction	7.8%	8.0%	7.2%	9.4%	9.7%	8.2%	9.0%	9.0%	9.0%

	Rockhampton LGA			Central Queensland SA4			Queensland		
	2006	2011	2016	2006	2011	2016	2006	2011	2016
Wholesale trade	3.8%	3.8%	2.9%	3.0%	3.0%	2.4%	3.9%	3.6%	2.6%
Retail trade	12.1%	11.1%	10.6%	10.6%	9.7%	9.6%	11.6%	10.7%	9.9%
Accommodation & food services	7.0%	7.1%	7.2%	6.8%	6.6%	6.7%	7.0%	7.0%	7.3%
Transport, postal & warehousing	6.7%	7.0%	6.2%	5.8%	6.1%	5.9%	5.1%	5.3%	5.1%
Information media & telecommunications	1.1%	0.8%	0.7%	0.8%	0.6%	0.5%	1.4%	1.2%	1.2%
Financial & insurance services	2.2%	1.7%	1.4%	1.6%	1.4%	1.1%	2.9%	2.7%	2.5%
Rental, hiring & real estate services	1.6%	1.4%	1.4%	1.7%	1.6%	1.5%	2.1%	1.8%	2.0%
Professional, scientific & technical services	3.2%	3.6%	3.6%	3.5%	4.5%	3.9%	5.6%	6.5%	6.3%
Administrative & support services	2.4%	2.4%	2.6%	2.3%	2.4%	2.9%	3.1%	3.2%	3.5%
Public administration & safety	6.6%	6.6%	6.7%	5.6%	5.3%	5.5%	6.7%	6.7%	6.6%
Education & training	9.7%	8.6%	9.8%	8.3%	7.7%	9.0%	7.6%	7.9%	9.0%
Health care & social assistance	12.2%	13.8%	15.1%	8.5%	9.3%	10.5%	10.2%	11.9%	13.0%
Arts & recreation services	0.8%	0.8%	0.8%	0.6%	0.6%	0.8%	1.3%	1.4%	1.6%
Other services	4.4%	4.3%	4.4%	3.7%	3.9%	4.1%	3.7%	3.9%	3.9%

Source: ABS Census of Population and Housing (2006, 2011 and 2016)

Resident Place of Work

As at 2016, approximately 18,148 residents in Rockhampton North were employed. The majority of residents in Rockhampton North worked in the following SA2s:

- Rockhampton City (21.0%);
- Parkhurst – Kawana (16.1%);
- Berserker (11.3%);
- Park Avenue (9.4%); and
- The Range - Allenstown (9.0%).

Table 12-2 Place of Work, Rockhampton North Residents, 2016

Place of Work SA2	Rockhampton North	% of Total
Rockhampton City	3,805	21.0%
Parkhurst - Kawana	2,917	16.1%
Berserker	2,055	11.3%
Park Avenue	1,709	9.4%
The Range - Allenstown	1,630	9.0%
Norman Gardens	1,243	6.8%
Lakes Creek	869	4.8%
Frenchville - Mount Archer	751	4.1%
Rockhampton - West	407	2.2%
Gracemere	343	1.9%
Rockhampton Region - East	327	1.8%
Glenlee - Rockyview	295	1.6%
Central Highlands - East	273	1.5%
Yeppoon	270	1.5%
Rockhampton Region - West	165	0.9%
Broadsound - Nebo	162	0.9%
Central Highlands - West	86	0.5%
Robina	82	0.5%
Bouldercombe	78	0.4%
Banana	76	0.4%
Moranbah	60	0.3%
Other SA2s	545	3.0%
Total	18,148	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 6,888 residents in Rockhampton South were employed. The majority of residents in Rockhampton South worked in the following SA2s:

- Rockhampton City (31.7%);
- The Range - Allenstown (22.6%);
- Parkhurst - Kawana (8.2%);
- Rockhampton - West (6.2%); and
- Berserker (6.0%).

Table 12-3 Place of Work, Rockhampton South Residents, 2016

Place of Work SA2	Rockhampton South	% of Total
Rockhampton City	2,181	31.7%
The Range - Allenstown	1,558	22.6%
Parkhurst - Kawana	567	8.2%
Rockhampton - West	427	6.2%
Berserker	411	6.0%
Park Avenue	324	4.7%
Norman Gardens	199	2.9%
Gracemere	195	2.8%
Central Highlands - East	114	1.7%
Rockhampton Region - West	92	1.3%
Lakes Creek	83	1.2%
Frenchville - Mount Archer	79	1.1%
Glenlee - Rockyview	59	0.9%
Yeppoon	53	0.8%
Broadsound - Nebo	50	0.7%
Other SA2s	496	7.2%
Total	6,888	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 710 residents in Mount Morgan were employed. The majority of residents in Mount Morgan also worked in Mount Morgan (43.2%). The SA2s responsible for significant outflows of workers from Mount Morgan were:

- Rockhampton City (10.4%);
- Parkhurst – Kawana (7.3%);
- Gracemere (7.2%); and
- The Range – Allenstown (5.5%).

Table 12-4 Place of Work, Mount Morgan Residents, 2016

Place of Work SA2	Mount Morgan	% of Total
Mount Morgan	307	43.2%

Place of Work SA2	Mount Morgan	% of Total
Rockhampton City	74	10.4%
Parkhurst - Kawana	52	7.3%
Gracemere	51	7.2%
The Range - Allenstown	39	5.5%
Park Avenue	30	4.2%
Berserker	21	3.0%
Central Highlands - East	18	2.5%
Bouldercombe	15	2.1%
Banana	15	2.1%
Broadsound - Nebo	13	1.8%
Central Highlands - West	11	1.5%
Rockhampton Region - West	11	1.5%
Yeppoon	10	1.4%
Moranbah	8	1.1%
Lakes Creek	6	0.8%
Rockhampton Region - East	6	0.8%
Rockhampton - West	5	0.7%
Robina	5	0.7%
South Trees	4	0.6%
Frenchville - Mount Archer	3	0.4%
Norman Gardens	3	0.4%
Runaway Bay	3	0.4%
Total	710	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 4,746 residents in Gracemere were employed. The majority of residents in Gracemere also worked in Gracemere (22.4%). The SA2s responsible for significant outflows of workers from Gracemere were:

- Rockhampton City (21.8%);
- The Range – Allenstown (11.7%);
- Parkhurst – Kawana (8.5%); and
- Park Avenue (5.6%).

Table 12-5 Place of Work, Gracemere Residents, 2016

Place of Work SA2	Gracemere	% of Total
Gracemere	1,063	22.4%
Rockhampton City	1,033	21.8%
The Range - Allenstown	555	11.7%

Place of Work SA2	Gracemere	% of Total
Parkhurst - Kawana	402	8.5%
Park Avenue	264	5.6%
Berserker	225	4.7%
Central Highlands - East	197	4.2%
Broadsound - Nebo	117	2.5%
Rockhampton - West	100	2.1%
Norman Gardens	90	1.9%
Rockhampton Region - West	88	1.9%
Bouldercombe	64	1.3%
Banana	57	1.2%
Lakes Creek	52	1.1%
Other SA2s	439	9.2%
Total	4,746	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 745 residents in Bouldercombe were employed. The majority of residents in Bouldercombe also worked in Bouldercombe (24.6%). The SA2s responsible for significant outflows of workers from Bouldercombe were:

- Rockhampton City (18.0%);
- The Range – Allenstown (8.5%);
- Gracemere (7.9%);
- Parkhurst – Kawana (7.2%);
- Central Highlands – East (5.1%);
- Berserker (5.1%); and
- Park Avenue (5.1%).

Table 12-6 Place of Work, Bouldercombe Residents, 2016

Place of Work SA2	Bouldercombe	% of Total
Bouldercombe	183	24.6%
Rockhampton City	134	18.0%
The Range - Allenstown	63	8.5%
Gracemere	59	7.9%
Parkhurst - Kawana	54	7.2%
Central Highlands - East	38	5.1%
Berserker	38	5.1%
Park Avenue	38	5.1%
Rockhampton - West	17	2.3%

Place of Work SA2	Bouldercombe	% of Total
Rockhampton Region - West	16	2.1%
Mount Morgan	10	1.3%
Central Highlands - West	9	1.2%
Glenlee - Rockyview	9	1.2%
Norman Gardens	9	1.2%
Broadsound - Nebo	9	1.2%
Lakes Creek	8	1.1%
Banana	8	1.1%
Callemondah	8	1.1%
Other SA2s	35	4.7%
Total	745	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 1,344 residents in Rockhampton Region - West were employed. The majority of residents in Rockhampton Region - West also worked in Rockhampton Region - West (30.9%). The SA2s responsible for significant outflows of workers from Rockhampton Region - West were:

- Rockhampton City (18.6%);
- The Range – Allenstown (8.5%);
- Parkhurst – Kawana (7.3%); and
- Gracemere (5.7%).

Table 12-7 Place of Work, Rockhampton Region - West Residents, 2016

Place of Work SA2	Rockhampton Region - West	% of Total
Rockhampton Region - West	415	30.9%
Rockhampton City	250	18.6%
The Range - Allenstown	114	8.5%
Parkhurst - Kawana	98	7.3%
Gracemere	77	5.7%
Park Avenue	60	4.5%
Central Highlands - East	58	4.3%
Rockhampton - West	41	3.1%
Berserker	39	2.9%
Broadsound - Nebo	31	2.3%
Central Highlands - West	21	1.6%
Frenchville - Mount Archer	20	1.5%
Banana	19	1.4%
Moranbah	18	1.3%

Place of Work SA2	Rockhampton Region - West	% of Total
Norman Gardens	12	0.9%
Other SA2s	71	5.3%
Total	1,344	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 1,350 residents in Rockhampton Region - East were employed. The majority of residents in Rockhampton Region - East also worked in Rockhampton Region - East (21.9%). The SA2s responsible for significant outflows of workers from Rockhampton Region - East were:

- Rockhampton City (13.2%);
- Yeppoon (12.3%);
- Parkhurst – Kawana (9.6%);
- Berserker (5.9%); and
- The Range - Allenstown (5.5%).

Table 12-8 Place of Work, Rockhampton Region - East Residents, 2016

Place of Work SA2	Rockhampton Region - East	% of Total
Rockhampton Region - East	296	21.9%
Rockhampton City	178	13.2%
Yeppoon	166	12.3%
Parkhurst - Kawana	129	9.6%
Berserker	79	5.9%
The Range - Allenstown	74	5.5%
Central Highlands - East	48	3.6%
Park Avenue	47	3.5%
Emu Park	35	2.6%
Norman Gardens	32	2.4%
Broadsound - Nebo	30	2.2%
Glenlee - Rockyview	26	1.9%
Frenchville - Mount Archer	23	1.7%
Lakes Creek	19	1.4%
Central Highlands - West	18	1.3%
Gracemere	17	1.3%
Rockhampton Region - North	17	1.3%
Banana	17	1.3%
Rockhampton - West	16	1.2%
Rockhampton Region - West	14	1.0%
Other SA2s	69	5.1%

Place of Work SA2	Rockhampton Region - East	% of Total
Total	1,350	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 2,157 residents in Glenlee - Rockyview were employed. The majority of residents in Glenlee - Rockyview worked in Rockhampton City (19.7%), whilst only 12.7% worked in Glenlee - Rockyview. The SA2s responsible for significant outflows of workers from Glenlee - Rockyview were:

- Parkhurst – Kawana (19.2%);
- Berserker (7.8%);
- The Range - Allenstown (7.7%);
- Park Avenue (7.1%); and
- Norman Gardens (5.0%).

Table 12-9 Place of Work, Glenlee - Rockyview Residents, 2016

Place of Work SA2	Glenlee - Rockyview	% of Total
Rockhampton City	425	19.7%
Parkhurst - Kawana	414	19.2%
Glenlee - Rockyview	275	12.7%
Berserker	168	7.8%
The Range - Allenstown	166	7.7%
Park Avenue	154	7.1%
Norman Gardens	107	5.0%
Central Highlands - East	52	2.4%
Rockhampton - West	40	1.9%
Frenchville - Mount Archer	39	1.8%
Yeppoon	37	1.7%
Gracemere	33	1.5%
Central Highlands - West	27	1.3%
Lakes Creek	26	1.2%
Broadsound - Nebo	26	1.2%
Rockhampton Region - West	20	0.9%
Rockhampton Region - North	19	0.9%
Rockhampton Region - East	15	0.7%
Banana	15	0.7%
Other SA2s	99	4.6%
Total	2,157	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 9,079 Livingstone Coastal Communities residents in were employed. The majority of residents in Livingstone Coastal Communities worked in the following SA2s:

- Yeppoon (45.8%);
- Rockhampton City (9.5%);
- Emu Park (7.4%); and
- Parkhurst – Kawana (5.9%).

Table 12-10 Place of Work, Livingstone Coastal Communities Residents, 2016

Place of Work SA2	Livingstone Coastal Communities	% of Total
Yeppoon	4,159	45.8%
Rockhampton City	866	9.5%
Emu Park	672	7.4%
Parkhurst - Kawana	539	5.9%
Central Highlands - East	351	3.9%
The Range - Allenstown	297	3.3%
Park Avenue	271	3.0%
Broadsound - Nebo	266	2.9%
Berserker	238	2.6%
Rockhampton Region - North	219	2.4%
Norman Gardens	174	1.9%
Central Highlands - West	122	1.3%
Glenlee - Rockyview	107	1.2%
Frenchville - Mount Archer	73	0.8%
Banana	72	0.8%
Gracemere	70	0.8%
Rockhampton Region - East	68	0.7%
Moranbah	67	0.7%
Rockhampton - West	61	0.7%
Other SA2s	387	4.3%
Total	9,079	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, approximately 1,757 Livingstone Shire Balance residents in were employed. The majority of residents in Livingstone Shire Balance worked in the following SA2s:

- Rockhampton Region – North (38.1%);
- Yeppoon (26.2%);
- Rockhampton City (5.8%); and
- Parkhurst – Kawana (5.4%).

Table 12-11 Place of Work, Livingstone Shire Balance Residents, 2016

Place of Work SA2	Livingstone Shire Balance	% of Total
Rockhampton Region - North	669	38.1%
Yeppoon	461	26.2%
Rockhampton City	102	5.8%
Parkhurst - Kawana	95	5.4%
Broadsound - Nebo	56	3.2%
The Range - Allenstown	55	3.1%
Central Highlands - East	50	2.8%
Berserker	36	2.0%
Park Avenue	34	1.9%
Glenlee - Rockyview	28	1.6%
Norman Gardens	19	1.1%
Rockhampton Region - East	16	0.9%
Emu Park	15	0.9%
Moranbah	12	0.7%
Central Highlands - West	11	0.6%
Frenchville - Mount Archer	11	0.6%
Gracemere	11	0.6%
Other SA2s	76	4.3%
Total	1,757	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

Workforce Origin

As at 2016, there were approximately 16,280 workers in Rockhampton North. The majority of workers in Rockhampton North are residents of the following SA2s:

- Norman Gardens (14.4%);
- Frenchville – Mount Archer (13.0%); and
- Parkhurst – Kawana (9.3%).

Table 12-12 SA2 of Origin, Rockhampton North Workforce, 2016

SA2 of Usual Residence	Rockhampton North	% of Total
Norman Gardens	2,339	14.4%
Frenchville - Mount Archer	2,122	13.0%
Parkhurst - Kawana	1,517	9.3%
Berserker	1,395	8.6%
Park Avenue	1,090	6.7%
Lakes Creek	1,081	6.6%
Gracemere	1,077	6.6%
Yeppoon	1,071	6.6%
Glenlee - Rockyview	908	5.6%
The Range - Allentown	728	4.5%
Rockhampton - West	629	3.9%
Rockhampton Region - East	329	2.0%
Rockhampton City	306	1.9%
Emu Park	265	1.6%
Rockhampton Region - West	234	1.4%
Rockhampton Region - North	198	1.2%
Bouldercombe	150	0.9%
Mount Morgan	115	0.7%
Buderim - South	26	0.2%
Other SA2s	726	4.5%
Total	16,280	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 15,819 workers in Rockhampton South. The majority of workers in Rockhampton South are residents of the following SA2s:

- The Range - Allentown (13.1%);
- Gracemere (10.7%);
- Norman Gardens (9.5%);
- Rockhampton – West (9.3%); and

- Frenchville – Mount Archer (9.1%).

Table 12-13 SA2 of Origin, Rockhampton South Workforce, 2016

SA2 of Usual Residence	Rockhampton South	% of Total
The Range - Allenstown	2,065	13.1%
Gracemere	1,688	10.7%
Norman Gardens	1,503	9.5%
Rockhampton - West	1,478	9.3%
Frenchville - Mount Archer	1,444	9.1%
Yeppoon	941	5.9%
Parkhurst - Kawana	863	5.5%
Berserker	804	5.1%
Park Avenue	650	4.1%
Glenlee - Rockyview	631	4.0%
Rockhampton City	623	3.9%
Lakes Creek	578	3.7%
Rockhampton Region - West	405	2.6%
Emu Park	283	1.8%
Rockhampton Region - East	268	1.7%
Bouldercombe	214	1.4%
Rockhampton Region - North	161	1.0%
Mount Morgan	118	0.7%
Other SA2s	1,102	7.0%
Total	15,819	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 425 workers in Mount Morgan. The majority of workers in Mount Morgan also lived in Mount Morgan (72.2%). The SA2s responsible for the second and third highest inflows of workers to Mount Morgan were:

- Gracemere (6.6%); and
- Frenchville – Mount Archer (3.3%).

Table 12-14 SA2 of Origin, Mount Morgan Workforce, 2016

SA2 of Usual Residence	Mount Morgan	% of Total
Mount Morgan	307	72.2%
Gracemere	28	6.6%
Frenchville - Mount Archer	14	3.3%
Bouldercombe	10	2.4%
Norman Gardens	10	2.4%

SA2 of Usual Residence	Mount Morgan	% of Total
Lockyer Valley - East	8	1.9%
The Range - Allenstown	5	1.2%
Banana	4	0.9%
Ipswich - East	4	0.9%
Leichhardt - One Mile	4	0.9%
Urangan - Wondunna	4	0.9%
Emerald	3	0.7%
Berserker	3	0.7%
Glenlee - Rockyview	3	0.7%
Parkhurst - Kawana	3	0.7%
Rockhampton - West	3	0.7%
Boonah	3	0.7%
Lowood	3	0.7%
Ipswich - Central	3	0.7%
Andergrove - Beaconsfield	3	0.7%
Total	425	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 1,988 workers in Gracemere. The majority of workers in Gracemere also lived in Gracemere (53.5%). The SA2s responsible for the second and third highest inflows of workers to Gracemere were:

- The Range – Allenstown (4.1%); and
- Rockhampton Region – West (3.9%).

Table 12-15 SA2 of Origin, Gracemere Workforce, 2016

SA2 of Usual Residence	Gracemere	% of Total
Gracemere	1,063	53.5%
The Range - Allenstown	82	4.1%
Rockhampton Region - West	77	3.9%
Berserker	68	3.4%
Frenchville - Mount Archer	68	3.4%
Rockhampton - West	65	3.3%
Parkhurst - Kawana	62	3.1%
Norman Gardens	60	3.0%
Bouldercombe	59	3.0%
Lakes Creek	52	2.6%
Mount Morgan	51	2.6%
Yeppoon	50	2.5%

SA2 of Usual Residence	Gracemere	% of Total
Rockhampton City	48	2.4%
Glenlee - Rockyview	33	1.7%
Park Avenue	33	1.7%
Central Highlands - West	20	1.0%
Emu Park	20	1.0%
Rockhampton Region - East	17	0.9%
Rockhampton Region - North	11	0.6%
Other SA2s	49	2.5%
Total	1,988	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 425 workers in Bouldercombe. The majority of workers in Bouldercombe also lived in Bouldercombe (43.1%). The SA2s responsible for the second and third highest inflows of workers to Bouldercombe were:

- Gracemere (15.1%); and
- Frenchville – Mount Archer (4.7%).

Table 12-16 SA2 of Origin, Bouldercombe Workforce, 2016

SA2 of Usual Residence	Bouldercombe	% of Total
Bouldercombe	183	43.1%
Gracemere	64	15.1%
Frenchville - Mount Archer	20	4.7%
Berserker	18	4.2%
Rockhampton - West	18	4.2%
Mount Morgan	15	3.5%
Norman Gardens	14	3.3%
The Range - Allentown	14	3.3%
Parkhurst - Kawana	11	2.6%
Lakes Creek	9	2.1%
Rockhampton City	9	2.1%
Gladstone Hinterland	9	2.1%
Rockhampton Region - West	8	1.9%
Park Avenue	6	1.4%
Banana	6	1.4%
Helensvale	6	1.4%
Central Highlands - West	4	0.9%
Emu Park	4	0.9%
Yeppoon	4	0.9%

SA2 of Usual Residence	Bouldercombe	% of Total
Glenlee - Rockyview	3	0.7%
Total	425	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 939 workers in Rockhampton Region - West. The majority of workers in Rockhampton Region - West also lived in Rockhampton Region - West (44.2%). The SA2s responsible for the second and third highest inflows of workers to Rockhampton Region - West were:

- Gracemere (9.4%); and
- Norman Gardens (5.9%).

Table 12-17 SA2 of Origin, Rockhampton Region - West Workforce, 2016

SA2 of Usual Residence	Rockhampton Region - West	% of Total
Rockhampton Region - West	415	44.2%
Gracemere	88	9.4%
Norman Gardens	55	5.9%
The Range - Allenstown	43	4.6%
Rockhampton - West	40	4.3%
Frenchville - Mount Archer	37	3.9%
Parkhurst - Kawana	36	3.8%
Yeppoon	30	3.2%
Glenlee - Rockyview	20	2.1%
Central Highlands - West	16	1.7%
Bouldercombe	16	1.7%
Lakes Creek	15	1.6%
Rockhampton Region - East	14	1.5%
Banana	12	1.3%
Berserker	11	1.2%
Emu Park	11	1.2%
Mount Morgan	11	1.2%
Park Avenue	11	1.2%
Other SA2s	58	6.2%
Total	939	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 808 workers in Rockhampton Region - East. The majority of workers in Rockhampton Region - East also lived in Rockhampton Region - East (36.6%). The SA2s responsible for the second and third highest inflows of workers to Rockhampton Region - East were:

- Lakes Creek (9.9%); and
- Norman Gardens (8.7%).

Table 12-18 SA2 of Origin, Rockhampton Region - East Workforce, 2016

SA2 of Usual Residence	Rockhampton Region - East	% of Total
Rockhampton Region - East	296	36.6%
Lakes Creek	80	9.9%
Norman Gardens	70	8.7%
Berserker	50	6.2%
Frenchville - Mount Archer	50	6.2%
Parkhurst - Kawana	41	5.1%
Park Avenue	36	4.5%
Yeppoon	35	4.3%
Emu Park	33	4.1%
Gracemere	20	2.5%
Rockhampton - West	20	2.5%
Rockhampton Region - North	16	2.0%
Glenlee - Rockyview	15	1.9%
The Range - Allentown	15	1.9%
Banana	8	1.0%
Mount Morgan	6	0.7%
Bouldercombe	5	0.6%
Rockhampton Region - West	5	0.6%
Rockhampton City	4	0.5%
Central Highlands - West	3	0.4%
Total	808	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 831 workers in Glenlee - Rockyview. The majority of workers in Glenlee - Rockyview also lived in Glenlee - Rockyview (33.1%). The SA2s responsible for the second and third highest inflows of workers to Glenlee - Rockyview were:

- Yeppoon (9.7%); and
- Norman Gardens (8.8%).

Table 12-19 SA2 of Origin, Glenlee - Rockyview Workforce, 2016

SA2 of Usual Residence	Glenlee - Rockyview	% of Total
Glenlee - Rockyview	275	33.1%
Yeppoon	81	9.7%
Norman Gardens	73	8.8%
Frenchville - Mount Archer	71	8.5%
Parkhurst - Kawana	61	7.3%

SA2 of Usual Residence	Glenlee - Rockyview	% of Total
Berserker	33	4.0%
Gracemere	32	3.9%
Park Avenue	30	3.6%
Rockhampton Region - North	28	3.4%
Lakes Creek	27	3.2%
Rockhampton - West	27	3.2%
Emu Park	26	3.1%
Rockhampton Region - East	26	3.1%
The Range - Allenstown	25	3.0%
Bouldercombe	9	1.1%
Rockhampton City	7	0.8%
Total	831	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 6,010 workers in Livingstone Coastal Communities. The majority of workers in Livingstone Coastal Communities are residents of the following SA2s:

- Yeppoon (66.1%);
- Emu Park (14.3%);
- Rockhampton Region - North (7.9%); and
- Rockhampton Region - East (3.3%).

Table 12-20 SA2 of Origin, Livingstone Coastal Communities Workforce, 2016

SA2 of Usual Residence	Livingstone Coastal Communities	% of Total
Yeppoon	3,974	66.1%
Emu Park	857	14.3%
Rockhampton Region - North	476	7.9%
Rockhampton Region - East	201	3.3%
Norman Gardens	74	1.2%
Parkhurst - Kawana	60	1.0%
Frenchville - Mount Archer	58	1.0%
Berserker	46	0.8%
The Range - Allenstown	41	0.7%
Glenlee - Rockyview	40	0.7%
Park Avenue	36	0.6%
Gracemere	34	0.6%
Lakes Creek	28	0.5%
Rockhampton - West	15	0.2%

SA2 of Usual Residence	Livingstone Coastal Communities	% of Total
Mount Morgan	10	0.2%
Other SA2s	60	1.0%
Total	6,010	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

As at 2016, there were approximately 1,043 workers in Livingstone Shire Balance. The majority of workers in Livingstone Shire Balance are residents of the following SA2s:

- Yeppoon (66.1%);
- Emu Park (14.3%);
- Rockhampton Region - North (7.9%); and
- Rockhampton Region - East (3.3%).

Table 12-21 SA2 of Origin, Livingstone Shire Balance Workforce, 2016

SA2 of Usual Residence	Livingstone Shire Balance	% of Total
Rockhampton Region - North	669	64.1%
Yeppoon	193	18.5%
Norman Gardens	27	2.6%
Emu Park	26	2.5%
Glenlee - Rockyview	19	1.8%
Rockhampton Region - East	17	1.6%
Broadsound - Nebo	16	1.5%
Johnstone	10	1.0%
Gracemere	8	0.8%
Central Highlands - West	6	0.6%
Berserker	6	0.6%
Parkhurst - Kawana	6	0.6%
Bouldercombe	5	0.5%
The Range - Allentown	5	0.5%
Tarragindi	4	0.4%
Rockhampton City	4	0.4%
Rockhampton Region - West	4	0.4%
Frenchville - Mount Archer	3	0.3%
Park Avenue	3	0.3%
Banana	3	0.3%
Proserpine	3	0.3%
Maroochy Hinterland	3	0.3%
Maryborough (Qld)	3	0.3%

SA2 of Usual Residence	Livingstone Shire Balance	% of Total
Total	1,043	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

Occupation Profile

Table 12-21 below details distribution of occupations by place of work within each catchment in 2016, where Table 12-22 below provides distribution of occupations by place of usual residence within each catchment in 2016.

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Table 12-22 Occupation by Place of Work and Catchment, 2016

	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Managers	9.7%	9.2%	8.6%	9.3%	21.4%	26.2%	15.3%	9.6%	9.8%	30.9%
Professionals	14.8%	23.9%	17.2%	9.4%	5.7%	7.5%	4.4%	19.4%	15.5%	7.8%
Technicians and Trades Workers	17.2%	12.3%	9.5%	15.0%	12.8%	23.7%	12.1%	14.4%	15.2%	12.8%
Community and Personal Service Workers	10.8%	14.7%	19.2%	11.6%	5.5%	2.7%	4.1%	26.0%	15.9%	6.2%
Clerical and Administrative Workers	13.3%	16.5%	10.6%	11.9%	7.8%	7.2%	7.4%	15.4%	13.0%	9.3%
Sales Workers	13.6%	8.5%	10.9%	11.3%	4.8%	0.8%	1.7%	3.2%	13.1%	3.7%
Machinery Operators and Drivers	6.8%	4.9%	5.7%	17.3%	20.9%	15.8%	7.7%	4.8%	4.5%	6.7%
Labourers	12.8%	8.5%	15.6%	12.9%	18.5%	13.8%	45.7%	5.6%	11.5%	20.8%
Inadequately described	0.7%	0.9%	1.1%	0.8%	1.4%	1.0%	0.7%	0.8%	0.7%	0.7%
Not stated	0.4%	0.6%	1.6%	0.5%	1.2%	1.3%	0.8%	0.9%	0.7%	1.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

Table 12-23 Occupation by Place of Usual Residence and Catchment, 2016

	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Managers	8.1%	10.1%	7.3%	7.3%	13.7%	19.4%	12.5%	11.1%	10.4%	18.8%
Professionals	15.9%	22.3%	8.9%	12.0%	10.2%	10.0%	12.7%	15.3%	16.4%	12.5%
Technicians and Trades Workers	16.7%	14.9%	14.4%	17.5%	15.7%	19.1%	18.7%	21.0%	17.7%	16.8%
Community and Personal Service Workers	12.3%	13.2%	14.3%	13.3%	9.1%	7.0%	10.4%	8.9%	12.4%	10.0%
Clerical and Administrative Workers	13.8%	12.0%	8.8%	13.5%	13.1%	11.4%	11.2%	15.7%	12.3%	11.1%
Sales Workers	10.8%	8.4%	9.2%	10.3%	7.2%	6.9%	6.9%	9.9%	9.5%	7.2%
Machinery Operators and Drivers	7.7%	7.0%	14.8%	14.0%	14.7%	12.0%	12.9%	9.5%	10.1%	9.2%
Labourers	13.5%	10.7%	20.0%	10.8%	13.7%	11.9%	12.1%	7.4%	9.6%	12.6%
Inadequately described	0.8%	0.8%	0.8%	0.9%	1.1%	1.1%	1.2%	1.0%	0.9%	0.7%
Not stated	0.4%	0.6%	1.6%	0.5%	1.6%	1.2%	1.2%	0.4%	0.7%	1.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

Industry of Employment

Table 12-23 details the distribution of employment by industry and place of work within each catchment in 2016, whereas Table 12-24 details the distribution of employment by industry and place of work within each catchment in 2016.

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Table 12-24 Industry of Employment by Place of Work and Catchment, 2016

	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Agriculture, Forestry and Fishing	0.5%	0.7%	4.3%	3.3%	15.9%	32.1%	13.8%	3.6%	1.2%	35.2%
Mining	2.1%	0.5%	1.9%	1.4%	6.8%	3.6%	4.4%	2.2%	1.5%	4.5%
Manufacturing	9.2%	2.0%	0.6%	3.0%	17.7%	1.2%	43.7%	2.5%	2.9%	2.7%
Electricity, Gas, Water and Waste Services	4.6%	0.8%	1.7%	1.3%	0.0%	25.3%	0.0%	0.4%	0.5%	0.9%
Construction	7.7%	4.3%	3.0%	9.7%	15.9%	9.0%	8.0%	10.9%	8.9%	8.5%
Wholesale Trade	3.3%	3.3%	0.0%	2.8%	1.4%	0.7%	3.6%	0.9%	1.3%	1.5%
Retail Trade	15.7%	8.4%	11.3%	10.8%	3.7%	1.0%	2.5%	2.8%	14.3%	3.7%
Accommodation and Food Services	6.9%	7.9%	5.6%	7.9%	1.6%	1.2%	1.2%	4.4%	12.5%	12.4%
Transport, Postal and Warehousing	4.1%	6.9%	3.0%	20.8%	12.6%	10.9%	3.1%	2.3%	2.1%	3.1%
Information Media and Telecommunications	0.6%	1.1%	0.6%	0.2%	0.0%	0.0%	0.0%	0.0%	0.7%	0.3%
Financial and Insurance Services	1.2%	2.3%	1.9%	0.5%	0.0%	0.0%	0.0%	0.0%	1.6%	0.5%
Rental, Hiring and Real Estate Services	1.1%	1.7%	3.2%	2.5%	1.6%	0.0%	1.1%	0.8%	2.3%	0.8%
Professional, Scientific and Technical Services	3.1%	5.1%	0.6%	1.2%	1.2%	2.1%	1.3%	2.7%	3.7%	3.4%
Administrative and Support Services	2.7%	2.0%	3.0%	2.4%	1.9%	1.7%	2.8%	3.5%	3.3%	2.9%
Public Administration and Safety	4.7%	10.1%	8.4%	4.1%	2.1%	0.0%	0.7%	29.6%	7.1%	1.7%
Education and Training	13.0%	8.9%	17.7%	9.1%	7.7%	4.1%	3.7%	22.3%	12.8%	8.5%
Health Care and Social Assistance	9.3%	26.2%	26.2%	8.8%	1.6%	0.4%	1.3%	3.5%	13.1%	1.2%
Arts and Recreation Services	1.1%	0.8%	0.0%	1.0%	0.0%	0.4%	0.6%	1.1%	1.5%	1.1%
Other Services	5.5%	4.0%	2.2%	5.2%	0.9%	1.8%	4.1%	2.7%	4.9%	2.4%

	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Inadequately described	2.6%	2.0%	1.9%	2.8%	5.8%	2.7%	3.5%	2.9%	2.5%	3.6%
Not stated	0.9%	0.9%	2.4%	1.2%	1.6%	1.7%	0.5%	0.9%	1.1%	1.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

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Table 12-25 Industry of Employment by Place of Usual Residence and Catchment, 2016

	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Agriculture, Forestry and Fishing	0.8%	1.3%	4.1%	1.9%	8.2%	19.0%	6.9%	1.8%	1.7%	16.4%
Mining	4.2%	3.5%	6.9%	9.1%	9.5%	8.5%	8.8%	8.0%	10.2%	8.0%
Manufacturing	7.7%	3.8%	4.1%	3.8%	4.9%	3.4%	5.1%	4.8%	3.2%	3.7%
Electricity, Gas, Water and Waste Services	3.2%	2.0%	1.9%	2.5%	2.3%	1.9%	2.2%	3.6%	1.6%	1.6%
Construction	6.9%	7.2%	6.5%	7.9%	8.7%	8.8%	11.5%	9.7%	9.4%	9.7%
Wholesale Trade	3.0%	2.4%	1.7%	3.4%	3.6%	2.7%	2.4%	3.1%	2.2%	1.8%
Retail Trade	11.6%	8.8%	9.8%	11.1%	5.7%	7.7%	7.1%	10.9%	10.2%	7.6%
Accommodation and Food Services	7.0%	9.2%	5.3%	6.7%	4.6%	3.6%	4.8%	4.6%	8.3%	7.6%
Transport, Postal and Warehousing	5.5%	5.3%	7.6%	8.9%	10.9%	6.0%	5.0%	5.8%	3.6%	3.2%
Information Media and Telecommunications	0.8%	0.8%	0.4%	0.6%	0.0%	0.0%	0.3%	0.7%	0.6%	0.7%
Financial and Insurance Services	1.6%	1.4%	0.4%	0.9%	1.0%	1.1%	0.7%	1.4%	1.4%	0.8%
Rental, Hiring and Real Estate Services	1.4%	1.4%	0.9%	1.5%	1.0%	1.4%	1.5%	1.5%	1.9%	1.0%
Professional, Scientific and Technical Services	3.7%	4.2%	1.3%	2.7%	3.1%	3.8%	2.8%	3.3%	3.7%	3.7%
Administrative and Support Services	2.7%	2.7%	3.9%	2.4%	3.5%	2.1%	3.2%	2.7%	3.3%	3.0%
Public Administration and Safety	6.9%	6.6%	10.5%	6.0%	6.4%	4.5%	6.6%	6.2%	6.9%	4.0%
Education and Training	10.5%	10.7%	8.5%	7.0%	7.7%	7.2%	10.7%	10.3%	11.3%	9.4%
Health Care and Social Assistance	13.9%	20.2%	17.2%	14.9%	10.3%	8.3%	10.3%	11.1%	12.0%	9.2%
Arts and Recreation Services	0.9%	0.9%	0.4%	0.8%	0.0%	0.9%	0.6%	1.0%	1.2%	1.1%
Other Services	4.5%	4.3%	2.8%	4.4%	3.7%	4.4%	4.6%	5.9%	4.1%	3.2%

	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Inadequately described	2.4%	2.0%	3.1%	2.4%	4.1%	3.4%	2.9%	2.4%	2.2%	2.6%
Not stated	0.8%	1.2%	2.6%	0.9%	1.0%	1.3%	1.8%	1.2%	0.9%	1.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: ABS (2017), 2016 Census of Population and Households, Australian Bureau of Statistics, Canberra

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Employment Retention

Table 12-25 details the net inflows and net outflows of employment by industry within each catchment in 2016.

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Table 12-26 Employment by Place of Work and Place of Usual Residence, Catchment Areas, 2016

Industry of Employment	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Agriculture, Forestry and Fishing	51.0%	110.3%	62.5%	72.0%	103.0%	108.7%	112.7%	75.6%	44.4%	124.2%
Mining	43.6%	32.5%	17.0%	6.1%	37.7%	27.6%	28.5%	10.3%	9.3%	32.2%
Manufacturing	104.0%	119.5%	9.4%	32.1%	190.0%	22.0%	485.3%	19.1%	56.0%	41.4%
Electricity, Gas, Water and Waste Services	125.9%	86.6%	53.3%	21.1%	0.0%	842.9%	0.0%	3.7%	19.1%	32.3%
Construction	98.2%	133.6%	28.0%	49.9%	97.1%	65.6%	39.4%	41.9%	58.9%	50.8%
Wholesale Trade	94.1%	308.8%	0.0%	33.5%	20.7%	17.9%	85.7%	11.4%	37.3%	45.7%
Retail Trade	117.5%	212.9%	68.4%	39.4%	34.8%	8.0%	20.0%	9.6%	87.4%	27.8%
Accommodation and Food Services	86.1%	193.2%	63.4%	47.5%	18.9%	20.8%	14.3%	35.8%	94.0%	93.8%
Transport, Postal and Warehousing	65.6%	286.8%	23.7%	94.2%	61.4%	117.2%	35.1%	15.0%	37.0%	56.7%
Information Media and Telecommunications	67.1%	300.0%	100.0%	12.9%	0.0%	0.0%	0.0%	0.0%	63.5%	21.4%
Financial and Insurance Services	64.1%	369.7%	300.0%	22.2%	0.0%	0.0%	0.0%	0.0%	67.9%	37.5%
Rental, Hiring and Real Estate Services	71.1%	273.5%	214.3%	68.5%	87.5%	0.0%	40.9%	20.0%	77.2%	50.0%
Professional, Scientific and Technical Services	73.8%	276.0%	30.0%	18.4%	20.0%	35.7%	26.8%	30.3%	63.2%	52.1%
Administrative and Support Services	89.5%	169.6%	46.7%	40.5%	28.6%	51.6%	48.9%	48.4%	63.0%	57.1%
Public Administration and Safety	59.3%	341.3%	48.1%	27.4%	17.3%	0.0%	6.2%	178.2%	64.3%	25.0%
Education and Training	108.2%	186.8%	124.2%	52.4%	53.2%	36.2%	19.6%	80.6%	70.5%	52.2%
Health Care and Social Assistance	58.1%	289.6%	91.0%	23.9%	8.4%	3.3%	7.2%	11.8%	68.1%	7.4%
Arts and Recreation Services	114.1%	193.8%	0.0%	53.8%	0.0%	30.8%	55.6%	39.1%	75.4%	57.1%

Industry of Employment	Rockhampton North	Rockhampton South	Mount Morgan	Gracemere	Bouldercombe	Rockhampton Region - West	Rockhampton Region - East	Glenlee - Rockyview	Livingstone Coastal Communities	Livingstone Shire Balance
Other Services	106.3%	207.4%	45.5%	47.5%	13.3%	26.6%	50.7%	16.9%	75.1%	43.3%
Employment Retention Rate (%)	87.2%	223.0%	56.8%	40.6%	53.7%	64.7%	56.8%	37.0%	62.5%	57.6%
Employment by POW	16,605	16,113	440	2,037	431	944	838	842	6,102	1,097
Employment by POUR	19,042	7,226	775	5,014	802	1,459	1,476	2,276	9,766	1,905

Source: ABS (2017), 2016 Census of Population and Housing, Australian Bureau of Statistics, Canberra

NOT COUNCIL PROPERTY

Appendix B Retail Expenditure Analysis

By Category

B.1 Detailed Retail Expenditure Estimates

Table B-1 Adjusted Annual available expenditure by retail category (\$m), 2020 to 2041 (2020 dollars)

	2020	2021	2026	2031	2036	2041
Rockhampton North						
Groceries & take home food	\$206.40	\$210.19	\$231.20	\$254.81	\$279.38	\$307.67
Dining & take away food	\$81.67	\$83.17	\$91.47	\$100.79	\$110.49	\$121.66
Clothing, footwear & apparel	\$35.75	\$36.28	\$39.22	\$42.46	\$45.71	\$49.40
Personal & other goods	\$55.02	\$55.84	\$60.37	\$65.36	\$70.36	\$76.04
Core bulky goods	\$35.64	\$36.18	\$39.11	\$42.34	\$45.58	\$49.25
Ancillary bulky goods	\$32.55	\$33.04	\$35.72	\$38.67	\$41.63	\$44.98
Hardware	\$15.15	\$15.41	\$16.83	\$18.41	\$20.03	\$21.89
Takeaway liquor	\$19.96	\$20.33	\$22.36	\$24.64	\$27.01	\$29.74
Total Grocery & Specialty	\$398.81	\$405.82	\$444.62	\$488.07	\$532.95	\$584.51
Total Bulky Goods	\$83.35	\$84.62	\$91.65	\$99.42	\$107.24	\$116.13
Total	\$482.16	\$490.44	\$536.28	\$587.49	\$640.19	\$700.64
Rockhampton South						
Groceries & take home food	\$84.56	\$85.11	\$89.00	\$93.67	\$98.45	\$103.17
Dining & take away food	\$33.97	\$34.19	\$35.75	\$37.61	\$39.53	\$41.41
Clothing, footwear & apparel	\$14.73	\$14.77	\$15.18	\$15.70	\$16.20	\$16.65
Personal & other goods	\$22.56	\$22.63	\$23.25	\$24.04	\$24.81	\$25.51
Core bulky goods	\$14.52	\$14.57	\$14.97	\$15.48	\$15.97	\$16.42
Ancillary bulky goods	\$13.27	\$13.31	\$13.68	\$14.14	\$14.59	\$15.01
Hardware	\$6.13	\$6.17	\$6.40	\$6.69	\$6.98	\$7.25
Takeaway liquor	\$8.05	\$8.10	\$8.47	\$8.91	\$9.36	\$9.81
Total Grocery & Specialty	\$163.86	\$164.80	\$171.65	\$179.93	\$188.35	\$196.55
Total Bulky Goods	\$33.92	\$34.04	\$35.05	\$36.31	\$37.54	\$38.68
Total	\$197.79	\$198.84	\$206.70	\$216.24	\$225.89	\$235.24
Mount Morgan						
Groceries & take home food	\$16.34	\$16.53	\$17.37	\$18.34	\$19.43	\$20.62
Dining & take away food	\$5.55	\$5.62	\$5.90	\$6.23	\$6.60	\$7.00
Clothing, footwear & apparel	\$2.51	\$2.53	\$2.62	\$2.71	\$2.82	\$2.94
Personal & other goods	\$3.85	\$3.88	\$4.01	\$4.16	\$4.32	\$4.50
Core bulky goods	\$2.43	\$2.45	\$2.54	\$2.63	\$2.74	\$2.85
Ancillary bulky goods	\$2.35	\$2.37	\$2.45	\$2.54	\$2.64	\$2.75
Hardware	\$1.12	\$1.13	\$1.18	\$1.24	\$1.30	\$1.37
Takeaway liquor	\$1.53	\$1.55	\$1.63	\$1.72	\$1.82	\$1.93
Total Grocery & Specialty	\$29.78	\$30.10	\$31.52	\$33.15	\$35.00	\$36.99
Total Bulky Goods	\$5.90	\$5.95	\$6.16	\$6.40	\$6.68	\$6.97
Total	\$35.68	\$36.06	\$37.68	\$39.55	\$41.67	\$43.96
Gracemere						

	2020	2021	2026	2031	2036	2041
Groceries & take home food	\$54.90	\$56.55	\$67.77	\$81.23	\$98.40	\$117.91
Dining & take away food	\$21.44	\$22.09	\$26.47	\$31.72	\$38.41	\$46.02
Clothing, footwear & apparel	\$9.41	\$9.67	\$11.38	\$13.40	\$15.94	\$18.74
Personal & other goods	\$14.49	\$14.88	\$17.52	\$20.63	\$24.54	\$28.85
Core bulky goods	\$9.37	\$9.62	\$11.34	\$13.35	\$15.87	\$18.66
Ancillary bulky goods	\$8.60	\$8.83	\$10.39	\$12.24	\$14.56	\$17.11
Hardware	\$4.01	\$4.13	\$4.91	\$5.84	\$7.02	\$8.35
Takeaway liquor	\$5.30	\$5.46	\$6.54	\$7.84	\$9.50	\$11.38
Total Grocery & Specialty	\$105.55	\$108.64	\$129.69	\$154.83	\$186.78	\$222.90
Total Bulky Goods	\$21.98	\$22.58	\$26.64	\$31.43	\$37.45	\$44.13
Total	\$127.53	\$131.22	\$156.33	\$186.26	\$224.23	\$267.03
Bouldercombe						
Groceries & take home food	\$8.26	\$8.36	\$8.92	\$9.42	\$9.98	\$10.61
Dining & take away food	\$3.22	\$3.26	\$3.47	\$3.67	\$3.89	\$4.13
Clothing, footwear & apparel	\$1.41	\$1.43	\$1.50	\$1.55	\$1.61	\$1.68
Personal & other goods	\$2.17	\$2.19	\$2.30	\$2.39	\$2.48	\$2.59
Core bulky goods	\$1.41	\$1.42	\$1.49	\$1.54	\$1.61	\$1.67
Ancillary bulky goods	\$1.29	\$1.30	\$1.37	\$1.42	\$1.47	\$1.54
Hardware	\$0.60	\$0.61	\$0.65	\$0.68	\$0.71	\$0.75
Takeaway liquor	\$0.80	\$0.81	\$0.86	\$0.91	\$0.96	\$1.02
Total Grocery & Specialty	\$15.85	\$16.05	\$17.06	\$17.93	\$18.93	\$20.04
Total Bulky Goods	\$3.30	\$3.33	\$3.50	\$3.64	\$3.79	\$3.96
Total	\$19.15	\$19.38	\$20.56	\$21.57	\$22.72	\$24.00
Rockhampton Region - West						
Groceries & take home food	\$13.78	\$13.93	\$15.18	\$16.69	\$18.31	\$20.02
Dining & take away food	\$5.68	\$5.74	\$6.25	\$6.87	\$7.54	\$8.24
Clothing, footwear & apparel	\$2.42	\$2.44	\$2.61	\$2.82	\$3.04	\$3.26
Personal & other goods	\$3.68	\$3.71	\$3.97	\$4.29	\$4.62	\$4.96
Core bulky goods	\$2.34	\$2.36	\$2.53	\$2.73	\$2.94	\$3.16
Ancillary bulky goods	\$2.14	\$2.16	\$2.31	\$2.50	\$2.69	\$2.89
Hardware	\$0.98	\$0.99	\$1.07	\$1.17	\$1.27	\$1.38
Takeaway liquor	\$1.28	\$1.29	\$1.40	\$1.54	\$1.69	\$1.85
Total Grocery & Specialty	\$26.84	\$27.10	\$29.41	\$32.21	\$35.19	\$38.33
Total Bulky Goods	\$5.47	\$5.51	\$5.91	\$6.40	\$6.90	\$7.42
Total	\$32.30	\$32.61	\$35.32	\$38.61	\$42.10	\$45.75
Rockhampton Regional Council						
Groceries & take home food	\$384.24	\$390.67	\$429.44	\$474.15	\$523.94	\$580.00
Dining & take away food	\$151.53	\$154.06	\$169.31	\$186.89	\$206.46	\$228.47
Clothing, footwear & apparel	\$66.23	\$67.11	\$72.51	\$78.65	\$85.32	\$92.68
Personal & other goods	\$101.77	\$103.13	\$111.43	\$120.87	\$131.13	\$142.44
Core bulky goods	\$65.72	\$66.60	\$71.97	\$78.07	\$84.71	\$92.02

	2020	2021	2026	2031	2036	2041
Ancillary bulky goods	\$60.20	\$61.00	\$65.91	\$71.50	\$77.58	\$84.27
Hardware	\$28.00	\$28.43	\$31.03	\$34.02	\$37.32	\$41.00
Takeaway liquor	\$36.91	\$37.53	\$41.26	\$45.56	\$50.34	\$55.73
Total Grocery & Specialty	\$740.69	\$752.51	\$823.95	\$906.12	\$997.20	\$1,099.32
Total Bulky Goods	\$153.93	\$156.03	\$168.92	\$183.59	\$199.60	\$217.29
Total	\$894.62	\$908.54	\$992.87	\$1,089.71	\$1,196.80	\$1,316.61
Rockhampton Region - East						
Groceries & take home food	\$15.16	\$15.28	\$16.99	\$19.08	\$21.37	\$23.84
Dining & take away food	\$5.81	\$5.86	\$6.51	\$7.31	\$8.19	\$9.13
Clothing, footwear & apparel	\$2.56	\$2.57	\$2.81	\$3.10	\$3.41	\$3.73
Personal & other goods	\$3.94	\$3.96	\$4.32	\$4.77	\$5.25	\$5.74
Core bulky goods	\$2.54	\$2.55	\$2.79	\$3.08	\$3.38	\$3.70
Ancillary bulky goods	\$2.35	\$2.36	\$2.58	\$2.84	\$3.12	\$3.42
Hardware	\$1.10	\$1.11	\$1.22	\$1.36	\$1.51	\$1.67
Takeaway liquor	\$1.46	\$1.47	\$1.63	\$1.83	\$2.05	\$2.29
Total Grocery & Specialty	\$28.93	\$29.14	\$32.27	\$36.09	\$40.26	\$44.74
Total Bulky Goods	\$5.98	\$6.01	\$6.58	\$7.28	\$8.02	\$8.80
Total	\$34.91	\$35.16	\$38.86	\$43.37	\$48.28	\$53.54
Glenlee - Rockyview						
Groceries & take home food	\$22.85	\$23.11	\$24.64	\$26.16	\$27.74	\$29.52
Dining & take away food	\$10.18	\$10.30	\$10.98	\$11.65	\$12.36	\$13.14
Clothing, footwear & apparel	\$4.14	\$4.17	\$4.37	\$4.56	\$4.74	\$4.95
Personal & other goods	\$6.12	\$6.17	\$6.46	\$6.74	\$7.02	\$7.33
Core bulky goods	\$3.76	\$3.79	\$3.97	\$4.14	\$4.31	\$4.51
Ancillary bulky goods	\$3.45	\$3.48	\$3.64	\$3.80	\$3.96	\$4.13
Hardware	\$1.51	\$1.53	\$1.62	\$1.70	\$1.79	\$1.89
Takeaway liquor	\$1.92	\$1.94	\$2.06	\$2.19	\$2.32	\$2.47
Total Grocery & Specialty	\$45.20	\$45.68	\$48.51	\$51.30	\$54.19	\$57.42
Total Bulky Goods	\$8.72	\$8.80	\$9.23	\$9.65	\$10.07	\$10.53
Total	\$53.92	\$54.48	\$57.74	\$60.94	\$64.26	\$67.95
Livingstone Coastal Communities						
Groceries & take home food	\$127.85	\$130.96	\$153.20	\$183.59	\$219.39	\$254.34
Dining & take away food	\$49.40	\$50.60	\$59.18	\$70.91	\$84.73	\$98.21
Clothing, footwear & apparel	\$21.74	\$22.19	\$25.51	\$30.03	\$35.24	\$40.08
Personal & other goods	\$33.45	\$34.14	\$39.26	\$46.21	\$54.22	\$61.68
Core bulky goods	\$21.60	\$22.05	\$25.35	\$29.85	\$35.02	\$39.84
Ancillary bulky goods	\$19.88	\$20.30	\$23.34	\$27.47	\$32.23	\$36.67
Hardware	\$9.29	\$9.51	\$11.04	\$13.13	\$15.58	\$17.92
Takeaway liquor	\$12.31	\$12.61	\$14.75	\$17.68	\$21.12	\$24.48
Total Grocery & Specialty	\$244.75	\$250.51	\$291.90	\$348.44	\$414.70	\$478.80
Total Bulky Goods	\$50.78	\$51.86	\$59.73	\$70.46	\$82.83	\$94.43

	2020	2021	2026	2031	2036	2041
Total	\$295.53	\$302.37	\$351.63	\$418.89	\$497.53	\$573.22
Livingstone Shire Balance						
Groceries & take home food	\$20.80	\$20.92	\$21.96	\$23.34	\$24.82	\$26.40
Dining & take away food	\$8.19	\$8.24	\$8.65	\$9.19	\$9.77	\$10.39
Clothing, footwear & apparel	\$3.60	\$3.60	\$3.72	\$3.88	\$4.05	\$4.23
Personal & other goods	\$5.55	\$5.56	\$5.73	\$5.99	\$6.25	\$6.52
Core bulky goods	\$3.60	\$3.61	\$3.72	\$3.88	\$4.06	\$4.23
Ancillary bulky goods	\$3.29	\$3.29	\$3.40	\$3.55	\$3.70	\$3.87
Hardware	\$1.53	\$1.54	\$1.60	\$1.69	\$1.79	\$1.89
Takeaway liquor	\$2.02	\$2.03	\$2.13	\$2.27	\$2.41	\$2.56
Total Grocery & Specialty	\$40.16	\$40.35	\$42.20	\$44.66	\$47.30	\$50.12
Total Bulky Goods	\$8.42	\$8.44	\$8.72	\$9.12	\$9.55	\$9.99
Total	\$48.58	\$48.79	\$50.92	\$53.78	\$56.85	\$60.10
Livingstone Shire Council Total						
Groceries & take home food	\$186.66	\$190.28	\$216.78	\$252.16	\$293.32	\$334.11
Dining & take away food	\$73.59	\$75.00	\$85.32	\$99.06	\$115.04	\$130.88
Clothing, footwear & apparel	\$32.03	\$32.54	\$36.41	\$41.57	\$47.45	\$53.00
Personal & other goods	\$49.05	\$49.83	\$55.78	\$63.71	\$72.74	\$81.28
Core bulky goods	\$31.50	\$32.00	\$35.84	\$40.95	\$46.77	\$52.28
Ancillary bulky goods	\$28.97	\$29.43	\$32.96	\$37.66	\$43.02	\$48.09
Hardware	\$13.44	\$13.68	\$15.48	\$17.89	\$20.67	\$23.37
Takeaway liquor	\$17.71	\$18.05	\$20.58	\$23.97	\$27.91	\$31.81
Total Grocery & Specialty	\$359.04	\$365.69	\$414.88	\$480.48	\$556.45	\$631.07
Total Bulky Goods	\$73.91	\$75.11	\$84.27	\$96.50	\$110.46	\$123.74
Total	\$432.95	\$440.80	\$499.15	\$576.98	\$666.91	\$754.81

Source: CDM Smith Analysis (2021)

Table B-2 Adjusted Supportable Retail Floorspace (sqm), 2020 to 2041

	2020	2021	2026	2031	2036	2041
Rockhampton North						
Groceries & take home food	21,726	22,015	23,619	25,390	27,153	29,166
Dining & take away food	14,850	15,047	16,140	17,348	18,549	19,921
Clothing, footwear & apparel	6,500	6,564	6,921	7,309	7,674	8,088
Personal & other goods	10,005	10,103	10,653	11,250	11,812	12,450
Core bulky goods	7,921	7,999	8,435	8,907	9,352	9,857
Ancillary bulky goods	5,919	5,977	6,302	6,655	6,988	7,365
Hardware	4,329	4,381	4,666	4,979	5,285	5,633
Takeaway liquor	2,218	2,248	2,411	2,591	2,771	2,976
Total Grocery & Specialty	55,299	55,976	59,745	63,888	67,958	72,601
Total Bulky Goods	18,169	18,357	19,403	20,541	21,625	22,856
Total	73,468	74,333	79,148	84,429	89,583	95,457

	2020	2021	2026	2031	2036	2041
Rockhampton South						
Groceries & take home food	8,901	8,915	9,092	9,333	9,568	9,780
Dining & take away food	6,176	6,185	6,308	6,474	6,636	6,781
Clothing, footwear & apparel	2,677	2,672	2,679	2,701	2,719	2,727
Personal & other goods	4,101	4,093	4,103	4,138	4,165	4,177
Core bulky goods	3,227	3,221	3,229	3,256	3,277	3,287
Ancillary bulky goods	2,412	2,408	2,414	2,434	2,450	2,457
Hardware	1,753	1,753	1,775	1,809	1,840	1,867
Takeaway liquor	894	896	913	937	961	982
Total Grocery & Specialty	22,751	22,761	23,095	23,584	24,048	24,446
Total Bulky Goods	7,392	7,382	7,417	7,499	7,567	7,610
Total	30,143	30,143	30,513	31,083	31,615	32,056
Mount Morgan						
Groceries & take home food	1,720	1,731	1,775	1,827	1,889	1,955
Dining & take away food	1,010	1,016	1,042	1,072	1,108	1,147
Clothing, footwear & apparel	457	458	461	467	474	481
Personal & other goods	700	702	707	715	726	737
Core bulky goods	541	543	547	553	561	570
Ancillary bulky goods	427	428	432	437	443	450
Hardware	320	322	328	335	343	353
Takeaway liquor	170	171	175	180	186	193
Total Grocery & Specialty	4,055	4,078	4,160	4,261	4,383	4,512
Total Bulky Goods	1,288	1,293	1,306	1,324	1,348	1,373
Total	5,343	5,371	5,466	5,586	5,731	5,885
Gracemere						
Groceries & take home food	5,779	5,923	6,924	8,094	9,563	11,177
Dining & take away food	3,899	3,996	4,670	5,459	6,449	7,536
Clothing, footwear & apparel	1,712	1,749	2,009	2,307	2,676	3,069
Personal & other goods	2,635	2,691	3,092	3,551	4,119	4,724
Core bulky goods	2,083	2,128	2,445	2,808	3,257	3,735
Ancillary bulky goods	1,563	1,597	1,834	2,107	2,444	2,802
Hardware	1,146	1,173	1,361	1,580	1,852	2,149
Takeaway liquor	589	604	706	825	974	1,138
Total Grocery & Specialty	14,613	14,963	17,400	20,236	23,781	27,644
Total Bulky Goods	4,792	4,898	5,640	6,494	7,553	8,686
Total	19,405	19,861	23,041	26,730	31,334	36,330
Bouldercombe						
Groceries & take home food	869	876	912	939	970	1,006
Dining & take away food	585	589	613	631	652	676
Clothing, footwear & apparel	257	258	264	267	271	276
Personal & other goods	395	397	406	411	417	424

	2020	2021	2026	2031	2036	2041
Core bulky goods	312	314	321	325	329	335
Ancillary bulky goods	235	236	241	244	247	252
Hardware	172	173	179	183	188	193
Takeaway liquor	89	89	93	96	99	102
Total Grocery & Specialty	2,194	2,209	2,288	2,343	2,409	2,484
Total Bulky Goods	719	723	741	751	765	780
Total	2,913	2,932	3,029	3,094	3,174	3,264
Rockhampton Region - West						
Groceries & take home food	1,451	1,459	1,550	1,663	1,779	1,898
Dining & take away food	1,032	1,038	1,103	1,183	1,265	1,349
Clothing, footwear & apparel	440	441	461	486	510	534
Personal & other goods	669	671	700	738	775	811
Core bulky goods	521	522	545	574	604	632
Ancillary bulky goods	390	391	408	430	452	473
Hardware	280	281	297	316	335	355
Takeaway liquor	142	142	151	162	174	185
Total Grocery & Specialty	3,734	3,751	3,966	4,231	4,504	4,778
Total Bulky Goods	1,191	1,194	1,250	1,320	1,390	1,459
Total	4,925	4,945	5,216	5,551	5,894	6,237
Rockhampton Regional Council Total						
Groceries & take home food	40,446	40,919	43,872	47,246	50,922	54,981
Dining & take away food	27,551	27,871	29,876	32,167	34,659	37,410
Clothing, footwear & apparel	12,042	12,142	12,795	13,536	14,323	15,175
Personal & other goods	18,504	18,657	19,663	20,803	22,014	23,323
Core bulky goods	14,605	14,726	15,521	16,423	17,380	18,416
Ancillary bulky goods	10,945	11,036	11,631	12,306	13,023	13,799
Hardware	8,000	8,083	8,605	9,201	9,844	10,549
Takeaway liquor	4,102	4,150	4,449	4,792	5,165	5,577
Total Grocery & Specialty	102,646	103,739	110,655	118,544	127,083	136,466
Total Bulky Goods	33,551	33,845	35,758	37,930	40,247	42,764
Total	136,197	137,584	146,412	156,473	167,330	179,229

Source: Derived from ABS (2018) Retail Trade publication and ABS (2019) Household Expenditure Survey

Table B-3 Adjusted Supply Demand Balance of Supportable Retail Floorspace (sqm) – Rockhampton Regional Council, 2020 to 2041

	2020	2021	2026	2031	2036	2041
Existing Supply						
Rockhampton North	185,758	185,758	185,758	185,758	185,758	185,758
Rockhampton South	139,956	139,956	139,956	139,956	139,956	139,956
Mount Morgan	4,869	4,869	4,869	4,869	4,869	4,869
Gracemere	15,907	15,907	15,907	15,907	15,907	15,907
Bouldercombe	0	0	0	0	0	0

	2020	2021	2026	2031	2036	2041
Rockhampton Region - West	0	0	0	0	0	0
Rockhampton Regional Council Total	346,489	346,489	346,489	346,489	346,489	346,489
Approved Centres						
Rockhampton North	0	0	9,713	9,713	9,713	9,713
Rockhampton South	0	0	0	650	650	650
Mount Morgan	0	0	0	0	0	0
Gracemere	0	0	10,179	10,179	10,179	10,179
Bouldercombe	0	0	0	0	0	0
Rockhampton Region - West	0	0	0	0	0	0
Rockhampton Regional Council Total	0	0	19,892	20,542	20,542	20,542
Total Existing Retail and Approved Floorspace						
Rockhampton North	185,758	185,758	195,471	195,471	195,471	195,471
Rockhampton South	139,956	139,956	139,956	140,606	140,606	140,606
Mount Morgan	4,869	4,869	4,869	4,869	4,869	4,869
Gracemere	15,907	15,907	26,086	26,086	26,086	26,086
Bouldercombe	0	0	0	0	0	0
Rockhampton Region - West	0	0	0	0	0	0
Rockhampton Regional Council Total	346,489	346,489	366,381	367,031	367,031	367,031
Demand						
Rockhampton North	73,468	74,333	79,148	84,429	89,583	95,457
Rockhampton South	30,143	30,143	30,513	31,083	31,615	32,056
Mount Morgan	5,343	5,371	5,466	5,586	5,731	5,885
Gracemere	19,405	19,861	23,041	26,730	31,334	36,330
Bouldercombe	2,913	2,932	3,029	3,094	3,174	3,264
Rockhampton Region - West	4,925	4,945	5,216	5,551	5,894	6,237
Rockhampton Regional Council Total	136,197	137,584	146,412	156,473	167,330	179,229
Supply Demand Balance						
Rockhampton North	112,290	111,425	116,322	111,041	105,888	100,014
Rockhampton South	109,813	109,813	109,443	109,523	108,990	108,549
Mount Morgan	-474	-502	-597	-717	-862	-1,016
Gracemere	-3,499	-3,954	3,045	-645	-5,248	-10,245
Bouldercombe	-2,913	-2,932	-3,029	-3,094	-3,174	-3,264
Rockhampton Region - West	-4,925	-4,945	-5,216	-5,551	-5,894	-6,237
Rockhampton Regional Council Total	210,292	208,905	219,969	210,558	199,701	187,802

Source: CDM Smith Analysis (2021)

B.2 Supply Demand Balance by Retail Expenditure Category

Table B-4 Supply Demand Balance by retail category (sqm), 2021

	2021 Occupied Retail Supply	2021 Demand	2021 Supply Demand Balance
Rockhampton North			
Groceries & take home food	31,826	22,015	9,811
Dining & take away food	21,693	15,047	6,646
Clothing, footwear & apparel	16,620	6,564	10,056
Personal & other goods	39,683	10,103	29,580
Core bulky goods	35,493	7,999	27,494
Ancillary bulky goods	12,675	5,977	6,698
Hardware	19,440	4,381	15,059
Takeaway liquor	7,550	2,248	5,302
Total Grocery & Specialty	117,372	55,976	61,395
Total Bulky Goods	67,608	18,357	49,251
Total	184,979	74,333	110,646
Rockhampton South			
Groceries & take home food	17,383	8,915	8,468
Dining & take away food	24,883	6,185	18,698
Clothing, footwear & apparel	17,203	2,672	14,531
Personal & other goods	43,454	4,093	39,360
Core bulky goods	5,315	3,221	2,094
Ancillary bulky goods	9,098	2,408	6,690
Hardware	15,015	1,753	13,262
Takeaway liquor	4,826	896	3,930
Total Grocery & Specialty	107,749	22,761	84,988
Total Bulky Goods	29,428	7,382	22,046
Total	137,177	30,143	107,034
Mount Morgan			
Groceries & take home food	1,062	1,731	-669
Dining & take away food	2,062	1,016	1,046
Clothing, footwear & apparel	258	458	-200
Personal & other goods	967	702	265
Core bulky goods	-	543	-543
Ancillary bulky goods	-	428	-428
Hardware	520	322	198
Takeaway liquor	-	171	-171
Total Grocery & Specialty	4,349	4,078	271
Total Bulky Goods	520	1,293	-773
Total	4,869	5,371	-502
Gracemere			
Groceries & take home food	6,514	5,923	591

	2021 Occupied Retail Supply	2021 Demand	2021 Supply Demand Balance
Dining & take away food	1,407	3,996	-2,589
Clothing, footwear & apparel	848	1,749	-901
Personal & other goods	3,934	2,691	1,243
Core bulky goods	-	2,128	-2,128
Ancillary bulky goods	-	1,597	-1,597
Hardware	1,500	1,173	327
Takeaway liquor	1,703	604	1,100
Total Grocery & Specialty	14,407	14,963	-556
Total Bulky Goods	1,500	4,898	-3,398
Total	15,907	19,861	-3,954
Bouldercombe			
Groceries & take home food	-	876	-876
Dining & take away food	-	589	-589
Clothing, footwear & apparel	-	258	-258
Personal & other goods	-	397	-397
Core bulky goods	-	314	-314
Ancillary bulky goods	-	236	-236
Hardware	-	173	-173
Takeaway liquor	-	89	-89
Total Grocery & Specialty	-	2,209	-2,209
Total Bulky Goods	-	723	-723
Total	-	2,932	-2,932
Rockhampton Region - West			
Groceries & take home food	-	1,459	-1,459
Dining & take away food	-	1,038	-1,038
Clothing, footwear & apparel	-	441	-441
Personal & other goods	-	671	-671
Core bulky goods	-	522	-522
Ancillary bulky goods	-	391	-391
Hardware	-	281	-281
Takeaway liquor	-	142	-142
Total Grocery & Specialty	-	3,751	-3,751
Total Bulky Goods	-	1,194	-1,194
Total	-	4,945	-4,945
Rockhampton Regional Council			
Groceries & take home food	56,785	40,919	15,866
Dining & take away food	50,046	27,871	22,174
Clothing, footwear & apparel	34,930	12,142	22,788
Personal & other goods	88,038	18,657	69,381
Core bulky goods	40,808	14,726	26,082
Ancillary bulky goods	21,772	11,036	10,736

	2021 Occupied Retail Supply	2021 Demand	2021 Supply Demand Balance
Hardware	36,474	8,083	28,392
Takeaway liquor	14,079	4,150	9,929
Total Grocery & Specialty	243,877	103,739	140,138
Total Bulky Goods	99,055	33,845	65,210
Total	342,932	137,584	205,348

Source: CDM Smith Analysis (2021)

NOT COUNCIL POLICY

Appendix C Two-Digit Employment Projections

NOT COUNCIL POLICY

C.1.1 Two Digit Employment Projections, Rockhampton Regional Council, 2016 to 2041

	2016	2021	2026	2031	2036	2041
Agriculture	661	715	764	778	769	748
Aquaculture	5	9	12	15	15	15
Forestry and Logging	11	13	15	17	17	17
Fishing, Hunting and Trapping	21	40	54	64	67	66
Agriculture, Forestry and Fishing Support Services	60	95	145	184	200	199
Coal Mining	250	410	529	630	696	735
Oil and Gas Extraction	2	1	2	3	3	4
Metal Ore Mining	71	109	145	176	196	207
Non-Metallic Mineral Mining and Quarrying	175	251	317	375	413	438
Exploration and Other Mining Support Services	143	36	31	29	28	29
Food Product Manufacturing	1,086	962	871	911	989	1,084
Beverage and Tobacco Product Manufacturing	28	26	13	15	17	19
Textile, Leather, Clothing and Footwear Manufacturing	30	30	33	39	44	49
Wood Product Manufacturing	64	32	10	12	14	16
Pulp, Paper and Converted Paper Product Manufacturing	9	9	13	18	22	25
Printing (including the Reproduction of Recorded Media)	36	26	19	25	31	35
Petroleum and Coal Product Manufacturing	15	20	23	30	35	40
Basic Chemical and Chemical Product Manufacturing	67	56	58	66	74	82
Polymer Product and Rubber Product Manufacturing	19	9	5	5	6	6
Non-Metallic Mineral Product Manufacturing	240	87	54	59	65	72
Primary Metal and Metal Product Manufacturing	168	119	89	101	114	126
Fabricated Metal Product Manufacturing	200	125	69	82	95	106

	2016	2021	2026	2031	2036	2041
Transport Equipment Manufacturing	193	124	84	98	115	129
Machinery and Equipment Manufacturing	233	132	67	79	91	102
Furniture and Other Manufacturing	83	47	20	26	30	34
Electricity Supply	1,168	1,459	1,750	2,121	2,460	2,690
Gas Supply	18	23	12	0	0	0
Water Supply, Sewerage and Drainage Services	81	47	28	19	23	25
Waste Collection, Treatment and Disposal Services	95	77	64	57	63	69
Building Construction	638	601	537	519	512	515
Heavy and Civil Engineering Construction	353	511	647	782	860	889
Construction Services	2,319	2,981	3,291	3,464	3,568	3,629
Basic Material Wholesaling	274	271	263	267	278	289
Machinery and Equipment Wholesaling	556	546	539	544	553	571
Motor Vehicle and Motor Vehicle Parts Wholesaling	189	206	225	238	248	257
Grocery, Liquor and Tobacco Product Wholesaling	241	276	326	365	388	405
Other Goods Wholesaling	97	93	81	77	77	79
Commission-Based Wholesaling	67	112	150	179	197	207
Motor Vehicle and Motor Vehicle Parts Retailing	515	435	353	312	292	283
Fuel Retailing	337	463	580	667	703	703
Food Retailing	1,617	1,810	1,944	2,010	2,024	2,002
Other Store-Based Retailing	2,330	1,838	1,389	1,090	949	903
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	59	65	73	74	71	69
Accommodation	770	732	733	808	883	947
Food and Beverage Services	2,185	1,961	1,701	1,652	1,700	1,793
Road Transport	1,085	906	788	764	792	816

	2016	2021	2026	2031	2036	2041
Rail Transport	1,078	1,118	1,153	1,195	1,228	1,262
Water Transport	25	49	71	86	94	98
Air and Space Transport	51	58	59	60	63	64
Other Transport	44	31	9	0	0	0
Postal and Courier Pick-up and Delivery Services	250	259	251	242	243	248
Transport Support Services	256	321	379	432	473	494
Warehousing and Storage Services	46	86	124	152	166	173
Publishing (except Internet and Music Publishing)	94	75	104	131	149	159
Motion Picture and Sound Recording Activities	39	54	64	72	77	81
Broadcasting (except Internet)	99	154	203	249	280	298
Internet Publishing and Broadcasting	15	23	25	26	27	28
Telecommunications Services	111	123	140	156	167	176
Internet Service Providers, Web Search Portals and Data Processing Services	15	21	31	40	45	48
Library and Other Information Services	22	16	12	10	9	9
Finance	361	185	83	46	34	33
Insurance and Superannuation Funds	122	83	53	42	38	40
Auxiliary Finance and Insurance Services	209	160	98	75	64	64
Rental and Hiring Services (except Real Estate)	199	186	194	222	250	280
Property Operators and Real Estate Services	427	650	916	1,192	1,430	1,630
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	1,474	1,534	1,589	1,662	1,781	1,982
Computer System Design and Related Services	215	232	254	279	309	347
Administrative Services	485	545	622	691	779	873
Building Cleaning, Pest Control and Other Support Services	627	852	1,200	1,572	1,889	2,149
Public Administration	2,035	1,823	1,676	1,596	1,611	1,691

	2016	2021	2026	2031	2036	2041
Defence	83	60	66	63	59	61
Public Order, Safety and Regulatory Services	817	755	694	650	642	670
Preschool and School Education	3,589	3,416	3,450	3,699	3,972	4,248
Tertiary Education	569	949	1,583	2,160	2,587	2,840
Adult, Community and Other Education	338	317	323	319	324	342
Hospitals	2,585	2,649	2,709	2,817	3,005	3,246
Medical and Other Health Care Services	1,818	2,238	2,665	3,070	3,440	3,761
Residential Care Services	1,001	1,111	1,244	1,407	1,569	1,714
Social Assistance Services	1,436	1,520	1,661	1,837	2,025	2,205
Heritage Activities	70	54	43	42	43	45
Creative and Performing Arts Activities	26	39	57	71	81	87
Sports and Recreation Activities	245	286	314	350	378	399
Gambling Activities	37	53	82	109	127	137
Repair and Maintenance	1,101	1,043	965	909	893	918
Personal and Other Services	847	854	862	880	908	949
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	67	79	93	106	114	119
Total	41,790	42,958	45,043	48,563	52,164	55,489

Source: CDM Smith Estimates

C.1.2 Two Digit Employment Projections, Rockhampton North Catchment 2016 to 2041

	2016	2021	2026	2031	2036	2041
Agriculture	66	64	73	78	78	76
Aquaculture	0	0	0	0	0	0
Forestry and Logging	11	13	15	17	17	17
Fishing, Hunting and Trapping	21	40	54	64	67	66
Agriculture, Forestry and Fishing Support Services	7	19	34	44	48	48
Coal Mining	144	260	343	413	458	485
Oil and Gas Extraction	1	1	1	1	1	1
Metal Ore Mining	56	81	98	113	124	131
Non-Metallic Mineral Mining and Quarrying	110	200	264	321	358	379
Exploration and Other Mining Support Services	89	33	31	29	28	29
Food Product Manufacturing	869	815	793	843	918	1,007
Beverage and Tobacco Product Manufacturing	28	26	13	15	17	19
Textile, Leather, Clothing and Footwear Manufacturing	14	13	11	12	13	14
Wood Product Manufacturing	64	32	10	12	14	16
Pulp, Paper and Converted Paper Product Manufacturing	4	8	13	18	22	25
Printing (including the Reproduction of Recorded Media)	14	17	18	25	31	35
Petroleum and Coal Product Manufacturing	12	16	19	26	31	35
Basic Chemical and Chemical Product Manufacturing	22	21	24	29	34	38
Polymer Product and Rubber Product Manufacturing	14	7	5	5	6	6
Non-Metallic Mineral Product Manufacturing	215	65	41	46	52	57
Primary Metal and Metal Product Manufacturing	138	99	70	82	94	104
Fabricated Metal Product Manufacturing	174	102	50	60	70	78

	2016	2021	2026	2031	2036	2041
Transport Equipment Manufacturing	73	74	79	98	115	129
Machinery and Equipment Manufacturing	194	89	24	30	36	40
Furniture and Other Manufacturing	78	46	20	26	30	34
Electricity Supply	765	1,098	1,346	1,654	1,931	2,115
Gas Supply	18	23	12	0	0	0
Water Supply, Sewerage and Drainage Services	61	37	13	0	0	0
Waste Collection, Treatment and Disposal Services	70	55	43	34	39	43
Building Construction	343	367	357	365	370	375
Heavy and Civil Engineering Construction	165	210	254	319	358	372
Construction Services	1,326	1,822	2,132	2,322	2,431	2,482
Basic Material Wholesaling	126	112	97	95	101	106
Machinery and Equipment Wholesaling	161	221	283	332	360	377
Motor Vehicle and Motor Vehicle Parts Wholesaling	146	167	184	199	209	217
Grocery, Liquor and Tobacco Product Wholesaling	198	243	296	338	362	379
Other Goods Wholesaling	28	31	31	32	34	36
Commission-Based Wholesaling	10	12	14	15	15	16
Motor Vehicle and Motor Vehicle Parts Retailing	225	190	157	147	143	140
Fuel Retailing	232	360	479	558	592	593
Food Retailing	1,008	1,126	1,192	1,209	1,204	1,187
Other Store-Based Retailing	1,463	1,117	799	581	478	447
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	22	4	0	0	0	0
Accommodation	324	402	512	643	738	800
Food and Beverage Services	953	727	466	384	382	400
Road Transport	453	285	131	61	59	60

	2016	2021	2026	2031	2036	2041
Rail Transport	23	6	5	5	4	4
Water Transport	12	27	43	52	58	60
Air and Space Transport	9	13	11	7	6	6
Other Transport	44	31	9	0	0	0
Postal and Courier Pick-up and Delivery Services	181	199	184	165	161	162
Transport Support Services	77	93	112	130	143	150
Warehousing and Storage Services	35	68	100	123	135	141
Publishing (except Internet and Music Publishing)	50	75	104	131	149	159
Motion Picture and Sound Recording Activities	23	23	22	20	19	19
Broadcasting (except Internet)	16	37	63	89	106	114
Internet Publishing and Broadcasting	10	14	13	11	10	10
Telecommunications Services	41	29	27	25	24	24
Internet Service Providers, Web Search Portals and Data Processing Services	6	0	0	0	0	0
Library and Other Information Services	5	0	0	0	0	0
Finance	106	44	22	16	14	15
Insurance and Superannuation Funds	72	56	39	33	31	33
Auxiliary Finance and Insurance Services	62	26	0	0	0	0
Rental and Hiring Services (except Real Estate)	72	61	54	53	59	66
Property Operators and Real Estate Services	141	149	159	185	215	243
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	508	564	640	724	810	912
Computer System Design and Related Services	114	138	165	193	219	248
Administrative Services	244	273	307	335	400	456
Building Cleaning, Pest Control and Other Support Services	332	445	619	804	949	1,074
Public Administration	652	598	562	548	561	590

	2016	2021	2026	2031	2036	2041
Defence	29	44	50	47	43	44
Public Order, Safety and Regulatory Services	214	204	184	186	194	205
Preschool and School Education	1,987	1,646	1,506	1,617	1,734	1,853
Tertiary Education	331	767	1,435	1,991	2,399	2,637
Adult, Community and Other Education	162	127	118	102	93	95
Hospitals	165	242	335	416	484	535
Medical and Other Health Care Services	608	776	928	1,064	1,188	1,297
Residential Care Services	400	438	482	543	602	657
Social Assistance Services	601	715	897	1,102	1,278	1,409
Heritage Activities	42	43	43	42	43	45
Creative and Performing Arts Activities	2	0	0	0	0	0
Sports and Recreation Activities	135	153	170	194	213	226
Gambling Activities	17	16	17	18	19	20
Repair and Maintenance	623	625	615	610	617	633
Personal and Other Services	395	483	577	662	720	753
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	66	79	93	106	114	119
Total	19,126	20,079	21,612	24,048	26,284	28,026

Source: CDM Smith Estimates

C.1.3 Two Digit Employment Projections, Rockhampton South Catchment, 2016 to 2041

	2016	2021	2026	2031	2036	2041
Agriculture	107	154	189	210	215	211
Aquaculture	0	0	0	0	0	0
Forestry and Logging	0	0	0	0	0	0
Fishing, Hunting and Trapping	0	0	0	0	0	0
Agriculture, Forestry and Fishing Support Services	11	1	0	0	0	0
Coal Mining	64	85	89	94	99	103
Oil and Gas Extraction	0	0	0	0	0	0
Metal Ore Mining	4	8	10	11	12	12
Non-Metallic Mineral Mining and Quarrying	11	12	14	16	17	18
Exploration and Other Mining Support Services	26	0	0	0	0	0
Food Product Manufacturing	139	78	14	5	5	5
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	0
Textile, Leather, Clothing and Footwear Manufacturing	7	0	0	0	0	0
Wood Product Manufacturing	0	0	0	0	0	0
Pulp, Paper and Converted Paper Product Manufacturing	5	1	0	0	0	0
Printing (including the Reproduction of Recorded Media)	22	9	1	0	0	0
Petroleum and Coal Product Manufacturing	2	2	1	1	1	1
Basic Chemical and Chemical Product Manufacturing	13	3	0	0	0	0
Polymer Product and Rubber Product Manufacturing	5	2	0	0	0	0
Non-Metallic Mineral Product Manufacturing	13	9	1	0	0	0
Primary Metal and Metal Product Manufacturing	11	0	0	0	0	0
Fabricated Metal Product Manufacturing	26	23	19	22	26	28

	2016	2021	2026	2031	2036	2041
Transport Equipment Manufacturing	107	49	5	0	0	0
Machinery and Equipment Manufacturing	26	22	19	22	25	28
Furniture and Other Manufacturing	5	1	0	0	0	0
Electricity Supply	122	5	3	3	2	2
Gas Supply	0	0	0	0	0	0
Water Supply, Sewerage and Drainage Services	15	0	0	0	0	0
Waste Collection, Treatment and Disposal Services	11	6	4	3	3	3
Building Construction	239	195	142	112	99	96
Heavy and Civil Engineering Construction	69	106	134	154	165	169
Construction Services	688	784	763	732	720	723
Basic Material Wholesaling	101	95	86	80	77	78
Machinery and Equipment Wholesaling	388	322	256	212	194	194
Motor Vehicle and Motor Vehicle Parts Wholesaling	37	39	40	40	39	40
Grocery, Liquor and Tobacco Product Wholesaling	38	32	30	27	26	26
Other Goods Wholesaling	59	56	50	45	42	43
Commission-Based Wholesaling	34	41	45	48	50	52
Motor Vehicle and Motor Vehicle Parts Retailing	286	245	196	165	149	143
Fuel Retailing	62	78	90	97	98	97
Food Retailing	423	366	308	271	250	242
Other Store-Based Retailing	773	625	496	419	384	371
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	37	61	73	74	71	69
Accommodation	408	297	189	134	114	114
Food and Beverage Services	1,038	915	774	674	630	646
Road Transport	290	270	280	291	298	306

	2016	2021	2026	2031	2036	2041
Rail Transport	781	689	609	558	536	541
Water Transport	13	21	28	34	36	38
Air and Space Transport	42	45	48	53	56	58
Other Transport	0	0	0	0	0	0
Postal and Courier Pick-up and Delivery Services	53	40	41	44	46	47
Transport Support Services	117	107	73	38	24	20
Warehousing and Storage Services	11	18	24	28	31	32
Publishing (except Internet and Music Publishing)	44	0	0	0	0	0
Motion Picture and Sound Recording Activities	16	30	42	52	58	61
Broadcasting (except Internet)	83	118	139	160	174	184
Internet Publishing and Broadcasting	5	9	12	15	17	18
Telecommunications Services	60	81	95	108	118	124
Internet Service Providers, Web Search Portals and Data Processing Services	9	21	31	40	45	48
Library and Other Information Services	17	16	12	10	9	9
Finance	251	138	59	30	20	19
Insurance and Superannuation Funds	50	27	14	9	7	7
Auxiliary Finance and Insurance Services	147	135	98	75	64	64
Rental and Hiring Services (except Real Estate)	87	74	73	76	78	85
Property Operators and Real Estate Services	237	416	625	835	1,009	1,153
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	914	904	867	837	854	938
Computer System Design and Related Services	93	84	73	64	63	68
Administrative Services	201	214	238	259	267	292
Building Cleaning, Pest Control and Other Support Services	218	287	397	520	638	730
Public Administration	1,270	1,145	1,058	1,008	1,015	1,063

	2016	2021	2026	2031	2036	2041
Defence	54	16	17	16	16	17
Public Order, Safety and Regulatory Services	571	509	468	426	412	427
Preschool and School Education	1,264	1,413	1,562	1,670	1,793	1,917
Tertiary Education	234	175	139	159	177	191
Adult, Community and Other Education	151	163	176	185	197	211
Hospitals	2,369	2,349	2,313	2,336	2,451	2,636
Medical and Other Health Care Services	1,122	1,318	1,533	1,750	1,952	2,133
Residential Care Services	506	590	695	809	915	1,003
Social Assistance Services	734	708	663	624	624	662
Heritage Activities	21	8	0	0	0	0
Creative and Performing Arts Activities	18	21	22	22	23	24
Sports and Recreation Activities	91	104	108	115	122	128
Gambling Activities	20	38	65	91	108	117
Repair and Maintenance	357	276	187	119	86	87
Personal and Other Services	397	297	182	89	41	40
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	1	0	0	0	0	0
Total	18,348	17,600	17,109	17,225	17,891	19,015

Source: CDM Smith Estimates

C.1.4 Two Digit Employment Projections, Mount Morgan Catchment, 2016 to 2041

	2016	2021	2026	2031	2036	2041
Agriculture	23	16	11	7	5	4
Aquaculture	0	0	0	0	0	0
Forestry and Logging	0	0	0	0	0	0
Fishing, Hunting and Trapping	0	0	0	0	0	0
Agriculture, Forestry and Fishing Support Services	0	0	0	0	0	0
Coal Mining	6	0	0	0	0	0
Oil and Gas Extraction	0	0	0	0	0	0
Metal Ore Mining	4	0	0	0	0	0
Non-Metallic Mineral Mining and Quarrying	0	0	0	0	0	0
Exploration and Other Mining Support Services	0	0	0	0	0	0
Food Product Manufacturing	4	0	0	0	0	0
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	0
Textile, Leather, Clothing and Footwear Manufacturing	0	0	0	0	0	0
Wood Product Manufacturing	0	0	0	0	0	0
Pulp, Paper and Converted Paper Product Manufacturing	0	0	0	0	0	0
Printing (including the Reproduction of Recorded Media)	0	0	0	0	0	0
Petroleum and Coal Product Manufacturing	0	0	0	0	0	0
Basic Chemical and Chemical Product Manufacturing	0	0	0	0	0	0
Polymer Product and Rubber Product Manufacturing	0	0	0	0	0	0
Non-Metallic Mineral Product Manufacturing	0	0	0	0	0	0
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	0
Fabricated Metal Product Manufacturing	0	0	0	0	0	0

	2016	2021	2026	2031	2036	2041
Transport Equipment Manufacturing	0	0	0	0	0	0
Machinery and Equipment Manufacturing	0	0	0	0	0	0
Furniture and Other Manufacturing	0	0	0	0	0	0
Electricity Supply	0	0	0	0	0	0
Gas Supply	0	0	0	0	0	0
Water Supply, Sewerage and Drainage Services	5	10	15	19	23	25
Waste Collection, Treatment and Disposal Services	5	10	14	18	21	23
Building Construction	5	0	0	0	0	0
Heavy and Civil Engineering Construction	3	0	0	0	0	0
Construction Services	5	0	0	0	0	0
Basic Material Wholesaling	0	0	0	0	0	0
Machinery and Equipment Wholesaling	0	0	0	0	0	0
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	0
Grocery, Liquor and Tobacco Product Wholesaling	0	0	0	0	0	0
Other Goods Wholesaling	0	0	0	0	0	0
Commission-Based Wholesaling	0	0	0	0	0	0
Motor Vehicle and Motor Vehicle Parts Retailing	0	0	0	0	0	0
Fuel Retailing	4	8	10	12	13	13
Food Retailing	47	63	68	71	72	72
Other Store-Based Retailing	12	0	0	0	0	0
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	0	0	0	0	0	0
Accommodation	14	16	16	17	17	18
Food and Beverage Services	16	22	31	39	46	50
Road Transport	13	15	16	15	15	15

	2016	2021	2026	2031	2036	2041
Rail Transport	0	0	0	0	0	0
Water Transport	0	0	0	0	0	0
Air and Space Transport	0	0	0	0	0	0
Other Transport	0	0	0	0	0	0
Postal and Courier Pick-up and Delivery Services	5	2	0	0	0	0
Transport Support Services	0	0	0	0	0	0
Warehousing and Storage Services	0	0	0	0	0	0
Publishing (except Internet and Music Publishing)	0	0	0	0	0	0
Motion Picture and Sound Recording Activities	0	0	0	0	0	0
Broadcasting (except Internet)	0	0	0	0	0	0
Internet Publishing and Broadcasting	0	0	0	0	0	0
Telecommunications Services	4	8	13	18	20	22
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0	0
Library and Other Information Services	0	0	0	0	0	0
Finance	0	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0	0
Rental and Hiring Services (except Real Estate)	5	12	20	29	36	42
Property Operators and Real Estate Services	9	22	38	54	67	76
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0	0
Computer System Design and Related Services	3	0	0	0	0	0
Administrative Services	3	2	0	0	0	0
Building Cleaning, Pest Control and Other Support Services	9	16	25	32	38	43
Public Administration	31	32	33	34	35	37

	2016	2021	2026	2031	2036	2041
Defence	0	0	0	0	0	0
Public Order, Safety and Regulatory Services	10	15	22	28	32	35
Preschool and School Education	82	77	72	70	71	74
Tertiary Education	4	6	9	11	12	13
Adult, Community and Other Education	0	0	0	0	0	0
Hospitals	51	58	61	65	70	76
Medical and Other Health Care Services	32	58	85	109	128	141
Residential Care Services	31	28	24	19	18	19
Social Assistance Services	15	4	0	0	0	0
Heritage Activities	0	0	0	0	0	0
Creative and Performing Arts Activities	0	0	0	0	0	0
Sports and Recreation Activities	0	0	0	0	0	0
Gambling Activities	0	0	0	0	0	0
Repair and Maintenance	4	1	0	0	0	0
Personal and Other Services	10	9	6	3	1	1
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	0	0	0	0	0	0
Total	474	510	588	668	739	798

Source: CDM Smith Estimates

C.1.5 Two Digit Employment Projections, Gracemere Catchment, 2016 to 2041

	2016	2021	2026	2031	2036	2041
Agriculture	68	70	73	73	72	70
Aquaculture	0	0	0	0	0	0
Forestry and Logging	0	0	0	0	0	0
Fishing, Hunting and Trapping	0	0	0	0	0	0
Agriculture, Forestry and Fishing Support Services	6	4	2	0	0	0
Coal Mining	15	37	50	62	70	74
Oil and Gas Extraction	0	0	1	1	1	1
Metal Ore Mining	0	0	0	0	0	0
Non-Metallic Mineral Mining and Quarrying	5	16	25	33	38	41
Exploration and Other Mining Support Services	11	0	0	0	0	0
Food Product Manufacturing	16	17	16	16	17	18
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	0
Textile, Leather, Clothing and Footwear Manufacturing	6	10	12	14	16	17
Wood Product Manufacturing	0	0	0	0	0	0
Pulp, Paper and Converted Paper Product Manufacturing	0	0	0	0	0	0
Printing (including the Reproduction of Recorded Media)	0	0	0	0	0	0
Petroleum and Coal Product Manufacturing	0	1	1	1	1	1
Basic Chemical and Chemical Product Manufacturing	0	0	0	0	0	0
Polymer Product and Rubber Product Manufacturing	0	0	0	0	0	0
Non-Metallic Mineral Product Manufacturing	0	0	0	0	0	0
Primary Metal and Metal Product Manufacturing	20	20	19	19	21	23
Fabricated Metal Product Manufacturing	0	0	0	0	0	0

	2016	2021	2026	2031	2036	2041
Transport Equipment Manufacturing	13	1	0	0	0	0
Machinery and Equipment Manufacturing	14	20	24	27	30	33
Furniture and Other Manufacturing	0	0	0	0	0	0
Electricity Supply	16	11	6	2	0	0
Gas Supply	0	0	0	0	0	0
Water Supply, Sewerage and Drainage Services	0	0	0	0	0	0
Waste Collection, Treatment and Disposal Services	9	7	3	1	0	0
Building Construction	27	7	0	0	0	0
Heavy and Civil Engineering Construction	59	116	163	197	215	222
Construction Services	179	204	193	181	176	177
Basic Material Wholesaling	34	56	70	81	88	92
Machinery and Equipment Wholesaling	6	3	0	0	0	0
Motor Vehicle and Motor Vehicle Parts Wholesaling	6	0	0	0	0	0
Grocery, Liquor and Tobacco Product Wholesaling	5	0	0	0	0	0
Other Goods Wholesaling	4	2	0	0	0	0
Commission-Based Wholesaling	23	59	92	117	132	139
Motor Vehicle and Motor Vehicle Parts Retailing	4	0	0	0	0	0
Fuel Retailing	28	13	0	0	0	0
Food Retailing	135	256	376	459	497	500
Other Store-Based Retailing	79	91	93	89	87	85
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	0	0	0	0	0	0
Accommodation	7	0	0	0	0	0
Food and Beverage Services	168	293	430	554	642	698
Road Transport	257	310	358	397	421	435

	2016	2021	2026	2031	2036	2041
Rail Transport	182	205	221	231	238	245
Water Transport	0	0	0	0	0	0
Air and Space Transport	0	0	0	0	0	0
Other Transport	0	0	0	0	0	0
Postal and Courier Pick-up and Delivery Services	11	18	26	33	37	39
Transport Support Services	54	117	194	264	306	324
Warehousing and Storage Services	0	0	0	0	0	0
Publishing (except Internet and Music Publishing)	0	0	0	0	0	0
Motion Picture and Sound Recording Activities	0	0	0	0	0	0
Broadcasting (except Internet)	0	0	0	0	0	0
Internet Publishing and Broadcasting	0	0	0	0	0	0
Telecommunications Services	5	5	5	5	5	5
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0	0
Library and Other Information Services	0	0	0	0	0	0
Finance	4	3	1	1	0	0
Insurance and Superannuation Funds	0	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0	0
Rental and Hiring Services (except Real Estate)	21	32	47	63	76	87
Property Operators and Real Estate Services	36	44	52	60	67	75
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	29	27	24	21	21	23
Computer System Design and Related Services	5	10	16	22	27	31
Administrative Services	20	30	40	46	50	56
Building Cleaning, Pest Control and Other Support Services	46	87	147	210	261	299
Public Administration	75	47	22	6	0	0

	2016	2021	2026	2031	2036	2041
Defence	0	0	0	0	0	0
Public Order, Safety and Regulatory Services	17	19	14	5	0	0
Preschool and School Education	191	227	271	314	351	379
Tertiary Education	0	0	0	0	0	0
Adult, Community and Other Education	15	14	13	11	11	11
Hospitals	0	0	0	0	0	0
Medical and Other Health Care Services	56	86	118	148	172	190
Residential Care Services	64	54	44	37	34	36
Social Assistance Services	81	80	80	83	88	95
Heritage Activities	7	3	0	0	0	0
Creative and Performing Arts Activities	6	18	34	48	58	62
Sports and Recreation Activities	19	29	36	40	43	45
Gambling Activities	0	0	0	0	0	0
Repair and Maintenance	90	116	139	155	166	172
Personal and Other Services	40	66	97	127	146	155
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	0	0	0	0	0	0
Total	2,292	2,960	3,648	4,255	4,680	4,955

Source: CDM Smith Estimates

C.1.6 Two Digit Employment Projections, Bouldercombe Catchment, 2016 to 2041

	2016	2021	2026	2031	2036	2041
Agriculture	73	61	51	43	39	37
Aquaculture	5	9	12	15	15	15
Forestry and Logging	0	0	0	0	0	0
Fishing, Hunting and Trapping	0	0	0	0	0	0
Agriculture, Forestry and Fishing Support Services	6	10	15	18	19	18
Coal Mining	8	0	0	0	0	0
Oil and Gas Extraction	0	0	0	0	0	0
Metal Ore Mining	0	0	0	0	0	0
Non-Metallic Mineral Mining and Quarrying	28	2	0	0	0	0
Exploration and Other Mining Support Services	11	0	0	0	0	0
Food Product Manufacturing	50	44	39	37	38	41
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	0
Textile, Leather, Clothing and Footwear Manufacturing	3	7	10	13	16	18
Wood Product Manufacturing	0	0	0	0	0	0
Pulp, Paper and Converted Paper Product Manufacturing	0	0	0	0	0	0
Printing (including the Reproduction of Recorded Media)	0	0	0	0	0	0
Petroleum and Coal Product Manufacturing	1	1	2	2	2	3
Basic Chemical and Chemical Product Manufacturing	32	33	34	37	40	44
Polymer Product and Rubber Product Manufacturing	0	0	0	0	0	0
Non-Metallic Mineral Product Manufacturing	12	12	12	13	14	15
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	0
Fabricated Metal Product Manufacturing	0	0	0	0	0	0

	2016	2021	2026	2031	2036	2041
Transport Equipment Manufacturing	0	0	0	0	0	0
Machinery and Equipment Manufacturing	0	0	0	0	0	0
Furniture and Other Manufacturing	0	0	0	0	0	0
Electricity Supply	0	0	0	0	0	0
Gas Supply	0	0	0	0	0	0
Water Supply, Sewerage and Drainage Services	0	0	0	0	0	0
Waste Collection, Treatment and Disposal Services	0	0	0	0	0	0
Building Construction	9	12	11	10	10	9
Heavy and Civil Engineering Construction	29	51	75	95	107	111
Construction Services	57	84	103	116	123	126
Basic Material Wholesaling	6	8	9	11	12	13
Machinery and Equipment Wholesaling	0	0	0	0	0	0
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	0
Grocery, Liquor and Tobacco Product Wholesaling	0	0	0	0	0	0
Other Goods Wholesaling	0	0	0	0	0	0
Commission-Based Wholesaling	0	0	0	0	0	0
Motor Vehicle and Motor Vehicle Parts Retailing	0	0	0	0	0	0
Fuel Retailing	12	4	1	0	0	0
Food Retailing	0	0	0	0	0	0
Other Store-Based Retailing	5	6	3	0	0	0
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	0	0	0	0	0	0
Accommodation	6	5	1	0	0	0
Food and Beverage Services	7	2	0	0	0	0
Road Transport	45	25	4	0	0	0

	2016	2021	2026	2031	2036	2041
Rail Transport	0	0	0	0	0	0
Water Transport	0	0	0	0	0	0
Air and Space Transport	0	0	0	0	0	0
Other Transport	0	0	0	0	0	0
Postal and Courier Pick-up and Delivery Services	0	0	0	0	0	0
Transport Support Services	7	5	1	0	0	0
Warehousing and Storage Services	0	0	0	0	0	0
Publishing (except Internet and Music Publishing)	0	0	0	0	0	0
Motion Picture and Sound Recording Activities	0	0	0	0	0	0
Broadcasting (except Internet)	0	0	0	0	0	0
Internet Publishing and Broadcasting	0	0	0	0	0	0
Telecommunications Services	0	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0	0
Library and Other Information Services	0	0	0	0	0	0
Finance	0	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0	0
Rental and Hiring Services (except Real Estate)	8	6	0	0	0	0
Property Operators and Real Estate Services	5	19	42	59	72	83
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	5	11	19	27	34	39
Computer System Design and Related Services	0	0	0	0	0	0
Administrative Services	9	24	37	51	61	70
Building Cleaning, Pest Control and Other Support Services	5	0	0	0	0	0
Public Administration	7	2	0	0	0	0

	2016	2021	2026	2031	2036	2041
Defence	0	0	0	0	0	0
Public Order, Safety and Regulatory Services	5	7	7	4	3	3
Preschool and School Education	34	25	14	5	0	0
Tertiary Education	0	0	0	0	0	0
Adult, Community and Other Education	0	0	0	0	0	0
Hospitals	0	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0	0
Residential Care Services	0	0	0	0	0	0
Social Assistance Services	6	13	21	29	35	40
Heritage Activities	0	0	0	0	0	0
Creative and Performing Arts Activities	0	0	0	0	0	0
Sports and Recreation Activities	0	0	0	0	0	0
Gambling Activities	0	0	0	0	0	0
Repair and Maintenance	9	0	0	0	0	0
Personal and Other Services	0	0	0	0	0	0
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	0	0	0	0	0	0
Total	503	488	524	585	641	684

Source: CDM Smith Estimates

C.1.7 Two Digit Employment Projections, Rockhampton Region -West Catchment, 2016 to 2041

	2016	2021	2026	2031	2036	2041
Agriculture	324	350	367	368	360	349
Aquaculture	0	0	0	0	0	0
Forestry and Logging	0	0	0	0	0	0
Fishing, Hunting and Trapping	0	0	0	0	0	0
Agriculture, Forestry and Fishing Support Services	31	60	95	122	133	133
Coal Mining	14	29	46	61	69	73
Oil and Gas Extraction	0	0	1	1	1	1
Metal Ore Mining	7	20	37	52	61	64
Non-Metallic Mineral Mining and Quarrying	21	21	14	4	0	0
Exploration and Other Mining Support Services	8	3	0	0	0	0
Food Product Manufacturing	8	9	9	10	11	13
Beverage and Tobacco Product Manufacturing	0	0	0	0	0	0
Textile, Leather, Clothing and Footwear Manufacturing	0	0	0	0	0	0
Wood Product Manufacturing	0	0	0	0	0	0
Pulp, Paper and Converted Paper Product Manufacturing	0	0	0	0	0	0
Printing (including the Reproduction of Recorded Media)	0	0	0	0	0	0
Petroleum and Coal Product Manufacturing	0	0	0	0	0	0
Basic Chemical and Chemical Product Manufacturing	0	0	0	0	0	0
Polymer Product and Rubber Product Manufacturing	0	0	0	0	0	0
Non-Metallic Mineral Product Manufacturing	0	0	0	0	0	0
Primary Metal and Metal Product Manufacturing	0	0	0	0	0	0
Fabricated Metal Product Manufacturing	0	0	0	0	0	0

	2016	2021	2026	2031	2036	2041
Transport Equipment Manufacturing	0	0	0	0	0	0
Machinery and Equipment Manufacturing	0	0	0	0	0	0
Furniture and Other Manufacturing	0	0	0	0	0	0
Electricity Supply	265	344	395	463	527	573
Gas Supply	0	0	0	0	0	0
Water Supply, Sewerage and Drainage Services	0	0	0	0	0	0
Waste Collection, Treatment and Disposal Services	0	0	0	0	0	0
Building Construction	15	21	27	32	34	35
Heavy and Civil Engineering Construction	28	28	22	17	14	13
Construction Services	65	86	100	112	119	121
Basic Material Wholesaling	6	1	0	0	0	0
Machinery and Equipment Wholesaling	0	0	0	0	0	0
Motor Vehicle and Motor Vehicle Parts Wholesaling	0	0	0	0	0	0
Grocery, Liquor and Tobacco Product Wholesaling	0	0	0	0	0	0
Other Goods Wholesaling	5	4	0	0	0	0
Commission-Based Wholesaling	0	0	0	0	0	0
Motor Vehicle and Motor Vehicle Parts Retailing	0	0	0	0	0	0
Fuel Retailing	0	0	0	0	0	0
Food Retailing	3	0	0	0	0	0
Other Store-Based Retailing	0	0	0	0	0	0
Non-Store Retailing and Retail Commission-Based Buying and/or Selling	0	0	0	0	0	0
Accommodation	11	13	14	14	14	15
Food and Beverage Services	4	2	0	0	0	0
Road Transport	28	0	0	0	0	0

	2016	2021	2026	2031	2036	2041
Rail Transport	93	217	317	401	449	471
Water Transport	0	0	0	0	0	0
Air and Space Transport	0	0	0	0	0	0
Other Transport	0	0	0	0	0	0
Postal and Courier Pick-up and Delivery Services	0	0	0	0	0	0
Transport Support Services	0	0	0	0	0	0
Warehousing and Storage Services	0	0	0	0	0	0
Publishing (except Internet and Music Publishing)	0	0	0	0	0	0
Motion Picture and Sound Recording Activities	0	0	0	0	0	0
Broadcasting (except Internet)	0	0	0	0	0	0
Internet Publishing and Broadcasting	0	0	0	0	0	0
Telecommunications Services	0	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0	0
Library and Other Information Services	0	0	0	0	0	0
Finance	0	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0	0
Rental and Hiring Services (except Real Estate)	5	1	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	18	28	40	52	62	71
Computer System Design and Related Services	0	0	0	0	0	0
Administrative Services	7	2	0	0	0	0
Building Cleaning, Pest Control and Other Support Services	18	17	13	6	3	2
Public Administration	0	0	0	0	0	0

	2016	2021	2026	2031	2036	2041
Defence	0	0	0	0	0	0
Public Order, Safety and Regulatory Services	0	0	0	0	0	0
Preschool and School Education	30	28	25	24	24	25
Tertiary Education	0	0	0	0	0	0
Adult, Community and Other Education	9	13	17	20	23	25
Hospitals	0	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0	0
Residential Care Services	0	0	0	0	0	0
Social Assistance Services	0	0	0	0	0	0
Heritage Activities	0	0	0	0	0	0
Creative and Performing Arts Activities	0	0	0	0	0	0
Sports and Recreation Activities	0	0	0	0	0	0
Gambling Activities	0	0	0	0	0	0
Repair and Maintenance	20	24	24	24	24	25
Personal and Other Services	5	0	0	0	0	0
Private Households Employing Staff and Undifferentiated Goods and Service-Producing Activities of Households for Own Use	0	0	0	0	0	0
Total	1,047	1,320	1,563	1,782	1,929	2,011

Source: CDM Smith Estimates

Appendix D Projected Employment in Commercial Office Sectors by Catchment

NOT COUNCIL POLICY

D.1.1 Projected Total Employment in Commercial Office Sectors, By Catchment, 2021 to 2041

	2021	2026	2031	2036	2041
Rockhampton North					
Internet Publishing and Broadcasting	14	13	11	10	10
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	44	22	16	14	15
Insurance and Superannuation Funds	56	39	33	31	33
Auxiliary Finance and Insurance Services	26	0	0	0	0
Property Operators and Real Estate Services	149	159	185	215	243
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	564	640	724	810	912
Computer System Design and Related Services	138	165	193	219	248
Public Administration	598	562	548	561	590
Medical and Other Health Care Services	776	928	1,064	1,188	1,297
Administrative Services	273	307	335	400	456
Total	2,638	2,835	3,109	3,449	3,804
Rockhampton South					
Internet Publishing and Broadcasting	9	12	15	17	18
Internet Service Providers, Web Search Portals and Data Processing Services	21	31	40	45	48
Finance	138	59	30	20	19
Insurance and Superannuation Funds	27	14	9	7	7
Auxiliary Finance and Insurance Services	135	98	75	64	64
Property Operators and Real Estate Services	416	625	835	1,009	1,153
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	904	867	837	854	938
Computer System Design and Related Services	84	73	64	63	68
Public Administration	1,145	1,058	1,008	1,015	1,063
Medical and Other Health Care Services	1,318	1,533	1,750	1,952	2,133
Administrative Services	214	238	259	267	292
Total	4,411	4,609	4,921	5,313	5,802
Mount Morgan					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	22	38	54	67	76

	2021	2026	2031	2036	2041
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	32	33	34	35	37
Medical and Other Health Care Services	58	85	109	128	141
Administrative Services	2	0	0	0	0
Total	113	155	197	230	255
Gracemere					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	3	1	1	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	44	52	60	67	75
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	27	24	21	21	23
Computer System Design and Related Services	10	16	22	27	31
Public Administration	47	22	6	0	0
Medical and Other Health Care Services	86	118	148	172	190
Administrative Services	30	40	46	50	56
Total	246	273	304	338	375
Bouldercombe					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	19	42	59	72	83
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	11	19	27	34	39
Computer System Design and Related Services	0	0	0	0	0
Public Administration	2	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	24	37	51	61	70
Total	56	99	137	167	192
Rockhampton Region West					
Internet Publishing and Broadcasting	0	0	0	0	0

	2021	2026	2031	2036	2041
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	28	40	52	62	71
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	2	0	0	0	0
Total	30	40	52	62	71

Appendix E All Employment in Sole Traders and Employing Businesses, by Catchment, 2021 to 2041

NOT COUNCIL POLICY

E.1.1 Employment in Sole Trader and Employing Businesses, Rockhampton North, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	6	6	5	5	5
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	38	19	14	12	12
Insurance and Superannuation Funds	48	33	28	27	28
Auxiliary Finance and Insurance Services	22	0	0	0	0
Property Operators and Real Estate Services	127	135	157	183	207
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	310	352	398	446	502
Computer System Design and Related Services	76	91	106	121	136
Public Administration	209	197	192	196	207
Medical and Other Health Care Services	388	464	532	594	649
Administrative Services	137	154	168	200	228
Total	1,360	1,450	1,599	1,782	1,973
Employment within Employing Businesses					
Internet Publishing and Broadcasting	8	7	6	6	6
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	7	3	2	2	2
Insurance and Superannuation Funds	8	6	5	5	5
Auxiliary Finance and Insurance Services	4	0	0	0	0
Property Operators and Real Estate Services	22	24	28	32	36
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	254	288	326	365	411
Computer System Design and Related Services	62	74	87	99	111

	2021	2026	2031	2036	2041
Public Administration	389	366	356	365	384
Medical and Other Health Care Services	388	464	532	594	649
Administrative Services	137	154	168	200	228
Total	1,278	1,385	1,510	1,666	1,831
Total Employment					
Internet Publishing and Broadcasting	14	13	11	10	10
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	44	22	16	14	15
Insurance and Superannuation Funds	56	39	33	31	33
Auxiliary Finance and Insurance Services	26	0	0	0	0
Property Operators and Real Estate Services	149	159	185	215	243
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	564	640	724	810	912
Computer System Design and Related Services	138	165	193	219	248
Public Administration	598	562	548	561	590
Medical and Other Health Care Services	776	928	1,064	1,188	1,297
Administrative Services	273	307	335	400	456
Total	2,638	2,835	3,109	3,449	3,804

E.1.2 Employment in Sole Trader and Employing Businesses, Rockhampton South, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	3	4	5	6	6
Internet Service Providers, Web Search Portals and Data Processing Services	7	11	14	16	17
Finance	110	47	24	16	15
Insurance and Superannuation Funds	22	12	7	6	5
Auxiliary Finance and Insurance Services	108	78	60	51	51
Property Operators and Real Estate Services	333	500	668	807	922
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	316	303	293	299	328
Computer System Design and Related Services	29	26	22	22	24

	2021	2026	2031	2036	2041
Public Administration	572	529	504	508	532
Medical and Other Health Care Services	593	690	787	879	960
Administrative Services	117	131	143	147	160
Total	2,212	2,331	2,527	2,755	3,021
Employment within Employing Businesses					
Internet Publishing and Broadcasting	6	8	10	11	11
Internet Service Providers, Web Search Portals and Data Processing Services	14	20	26	30	31
Finance	28	12	6	4	4
Insurance and Superannuation Funds	5	3	2	1	1
Auxiliary Finance and Insurance Services	27	20	15	13	13
Property Operators and Real Estate Services	83	125	167	202	231
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	588	563	544	555	610
Computer System Design and Related Services	55	47	42	41	44
Public Administration	572	529	504	508	532
Medical and Other Health Care Services	725	843	962	1,074	1,173
Administrative Services	96	107	117	120	131
Total	2,199	2,278	2,394	2,558	2,781
Total Employment					
Internet Publishing and Broadcasting	9	12	15	17	18
Internet Service Providers, Web Search Portals and Data Processing Services	21	31	40	45	48
Finance	138	59	30	20	19
Insurance and Superannuation Funds	27	14	9	7	7
Auxiliary Finance and Insurance Services	135	98	75	64	64
Property Operators and Real Estate Services	416	625	835	1,009	1,153
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	904	867	837	854	938
Computer System Design and Related Services	84	73	64	63	68
Public Administration	1,145	1,058	1,008	1,015	1,063
Medical and Other Health Care Services	1,318	1,533	1,750	1,952	2,133
Administrative Services	214	238	259	267	292
Total	4,411	4,609	4,921	5,313	5,802

E.1.3 Employment in Sole Trader and Employing Businesses, Mount Morgan, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0

	2021	2026	2031	2036	2041
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	12	21	30	37	42
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	2	0	0	0	0
Total	14	21	30	37	42
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	10	17	24	30	34
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	32	33	34	35	37
Medical and Other Health Care Services	58	85	109	128	141
Administrative Services	0	0	0	0	0
Total	100	135	167	193	213
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	22	38	54	67	76
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	32	33	34	35	37
Medical and Other Health Care Services	58	85	109	128	141
Administrative Services	2	0	0	0	0
Total	113	155	197	230	255

E.1.4 Employment in Sole Trader and Employing Businesses, Gracemere, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	3	1	1	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	39	47	54	60	68
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	19	17	15	15	16
Computer System Design and Related Services	7	12	16	19	22
Public Administration	47	22	6	0	0
Medical and Other Health Care Services	56	77	96	112	123
Administrative Services	15	20	23	25	28
Total	186	195	210	231	257
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	4	5	6	7	8
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	8	7	6	6	7
Computer System Design and Related Services	3	5	7	8	9
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	30	41	52	60	66
Administrative Services	15	20	23	25	28
Total	61	78	94	106	118
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	3	1	1	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	44	52	60	67	75

	2021	2026	2031	2036	2041
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	27	24	21	21	23
Computer System Design and Related Services	10	16	22	27	31
Public Administration	47	22	6	0	0
Medical and Other Health Care Services	86	118	148	172	190
Administrative Services	30	40	46	50	56
Total	246	273	304	338	375

E.1.5 Employment in Sole Trader and Employing Businesses, Bouldercombe, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	3	6	9	11	12
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	6	11	15	18	21
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	24	37	51	61	70
Total	33	54	75	91	104
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	16	36	50	61	70
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	5	9	12	15	17
Computer System Design and Related Services	0	0	0	0	0
Public Administration	2	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	0	0	0	0	0
Total	23	44	62	77	88

	2021	2026	2031	2036	2041
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	19	42	59	72	83
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	11	19	27	34	39
Computer System Design and Related Services	0	0	0	0	0
Public Administration	2	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	24	37	51	61	70
Total	56	99	137	167	192

E.1.6 Employment in Sole Trader and Employing Businesses, Rockhampton Region - West, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	14	20	26	31	35
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	2	0	0	0	0
Total	16	20	26	31	35
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0

	2021	2026	2031	2036	2041
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	14	20	26	31	35
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	0	0	0	0	0
Total	14	20	26	31	35
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	28	40	52	62	71
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	2	0	0	0	0
Total	30	40	52	62	71

Appendix F Incidence of Working From Home by Catchment

NOT COUNCIL POLICY

F.1.1 Incidence of persons working from home – Commercial Office Sectors, Catchments

Commercial Sector	Rockhampton North			Rockhampton South			Mount Morgan			Gracemere			Bouldercombe			Rockhampton Regional - West		
	2011	2016	% change	2011	2016	% change	2011	2016	% change	2011	2016	% change	2011	2016	% change	2011	2016	% change
Internet Publishing and Broadcasting	-	-	-	-	98.2%	-	-	-	-	-	-	-	-	-	-	-	-	-
Internet Service Providers, Web Search Portals and Data Processing Services	0.0%	0.0%	0.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Finance	0.0%	0.0%	0.0%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Insurance and Superannuation Funds	6.3%	0.0%	-6.3%	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Auxiliary Finance and Insurance Services	5.3%	5.2%	-0.2%	0.0%	2.5%	2.5%	-	-	-	-	-	-	-	-	-	-	-	-
Property Operators and Real Estate Services	7.1%	2.4%	-4.7%	6.7%	5.8%	-0.9%	-	-	-	-	25.9%	25.9%	-	-	-	-	-	-
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	12.6%	12.0%	-0.6%	4.2%	5.8%	1.7%	33.3%	-	-33.3%	34.6%	45.8%	11.2%	-	-	-	77.8%	40.0%	-37.8%
Computer System Design and Related Services	11.5%	9.0%	-2.6%	3.3%	6.2%	3.0%	-	-	-	-	75.0%	75.0%	-	-	-	-	-	-
Public Administration	0.5%	0.5%	0.0%	0.3%	0.3%	0.0%	-	-	-	3.5%	0.0%	-3.5%	-	-	-	-	-	-
Medical and Other Health Care Services	3.0%	4.5%	1.4%	1.7%	2.0%	0.3%	-	-	-	0.0%	6.4%	6.4%	-	-	-	-	-	-
Administrative Services	1.9%	7.8%	5.9%	0.0%	7.5%	7.5%	-	-	-	0.0%	17.6%	17.6%	-	-	-	-	-	-
Commercial Sectors	4.8%	5.0%	0.3%	1.7%	2.8%	1.1%	6.5%	0.0%	-6.5%	7.0%	14.7%	7.7%	-	-	-	35.0%	28.6%	-6.4%
All Sectors	1.9%	2.0%	0.1%	1.2%	1.5%	0.2%	4.4%	1.9%	-2.4%	6.8%	6.3%	-0.5%	13.1%	12.6%	-0.5%	23.6%	18.5%	-5.1%

Source: ABS Census of Population and Housing, 2011 and 2016

**Appendix G Employment in Sole Traders and
Employing Businesses Requiring Commercial Office
Space, by Catchment, 2021 to 2041**

NOT COUNCIL POLICY

G.1.1 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space, Rockhampton North, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	3	3	3	2	2
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	19	9	7	6	6
Insurance and Superannuation Funds	24	17	14	13	14
Auxiliary Finance and Insurance Services	11	0	0	0	0
Property Operators and Real Estate Services	63	68	78	91	103
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	155	176	199	223	251
Computer System Design and Related Services	38	45	53	60	68
Public Administration	105	98	96	98	103
Medical and Other Health Care Services	194	232	266	297	324
Administrative Services	68	77	84	100	114
Total	680	725	800	891	986
Employment within Employing Businesses					
Internet Publishing and Broadcasting	8	7	6	6	6
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	7	3	2	2	2
Insurance and Superannuation Funds	8	6	5	5	5
Auxiliary Finance and Insurance Services	4	0	0	0	0
Property Operators and Real Estate Services	22	23	27	31	35
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	223	252	285	318	357
Computer System Design and Related Services	56	67	78	89	100
Public Administration	386	362	352	360	378
Medical and Other Health Care Services	370	441	504	562	614
Administrative Services	126	141	153	183	208
Total	1,208	1,301	1,413	1,555	1,705
Total Employment					
Internet Publishing and Broadcasting	11	10	9	8	8
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	25	13	9	8	8
Insurance and Superannuation Funds	32	22	19	18	19
Auxiliary Finance and Insurance Services	15	0	0	0	0
Property Operators and Real Estate Services	85	91	105	122	138

	2021	2026	2031	2036	2041
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	378	428	484	541	608
Computer System Design and Related Services	94	112	131	149	169
Public Administration	490	460	448	458	481
Medical and Other Health Care Services	564	673	770	859	938
Administrative Services	194	217	237	283	322
Total	1,888	2,027	2,213	2,446	2,691

G.1.2 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space, Rockhampton South, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	2	2	3	3	3
Internet Service Providers, Web Search Portals and Data Processing Services	4	5	7	8	8
Finance	55	24	12	8	7
Insurance and Superannuation Funds	11	6	4	3	3
Auxiliary Finance and Insurance Services	54	39	30	26	26
Property Operators and Real Estate Services	167	250	334	404	461
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	158	152	146	149	164
Computer System Design and Related Services	15	13	11	11	12
Public Administration	286	265	252	254	266
Medical and Other Health Care Services	297	345	394	439	480
Administrative Services	59	65	71	73	80
Total	1,106	1,166	1,264	1,378	1,510
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	14	20	25	29	30
Finance	27	12	6	4	4
Insurance and Superannuation Funds	5	3	2	1	1
Auxiliary Finance and Insurance Services	26	19	14	12	12
Property Operators and Real Estate Services	77	115	153	183	208
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	547	518	497	504	551
Computer System Design and Related Services	51	43	38	37	40
Public Administration	565	516	489	490	510
Medical and Other Health Care Services	702	808	917	1,017	1,105
Administrative Services	88	97	105	107	116

	2021	2026	2031	2036	2041
Total	2,102	2,151	2,246	2,385	2,577
Total Employment					
Internet Publishing and Broadcasting	2	2	3	3	3
Internet Service Providers, Web Search Portals and Data Processing Services	17	25	32	37	39
Finance	82	35	18	12	11
Insurance and Superannuation Funds	16	9	5	4	4
Auxiliary Finance and Insurance Services	80	58	44	38	38
Property Operators and Real Estate Services	244	365	487	587	669
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	705	670	644	654	715
Computer System Design and Related Services	65	56	49	48	52
Public Administration	851	781	741	743	776
Medical and Other Health Care Services	999	1,153	1,310	1,456	1,584
Administrative Services	147	162	176	181	197
Total	3,208	3,316	3,509	3,762	4,088

G.1.3 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space, Mount Morgan, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	6	10	15	18	21
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	1	0	0	0	0
Total	7	10	15	18	21
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0

	2021	2026	2031	2036	2041
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	10	17	24	30	34
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	32	33	34	35	37
Medical and Other Health Care Services	58	85	109	128	141
Administrative Services	0	0	0	0	0
Total	100	135	167	193	213
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	16	27	39	48	55
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	32	33	34	35	37
Medical and Other Health Care Services	58	85	109	128	141
Administrative Services	1	0	0	0	0
Total	106	145	182	211	234

G.1.4 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space, Gracemere, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	1	1	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	20	23	27	30	34
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	9	8	7	7	8
Computer System Design and Related Services	4	6	8	9	11
Public Administration	23	11	3	0	0

	2021	2026	2031	2036	2041
Medical and Other Health Care Services	28	38	48	56	62
Administrative Services	8	10	11	13	14
Total	93	98	105	116	128
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	3	3	3	3	4
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	4	3	2	2	2
Computer System Design and Related Services	1	1	1	1	1
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	28	39	46	52	54
Administrative Services	12	16	18	19	20
Total	48	62	71	77	81
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	1	1	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	23	26	30	34	37
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	13	11	10	9	10
Computer System Design and Related Services	4	7	9	11	12
Public Administration	23	11	3	0	0
Medical and Other Health Care Services	56	77	95	107	116
Administrative Services	20	26	29	31	34
Total	141	160	176	193	209

G.1.5 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space, Bouldercombe, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0

	2021	2026	2031	2036	2041
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	1	3	4	5	6
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	3	5	7	9	11
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	12	19	25	31	35
Total	17	27	37	45	52
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	16	36	50	61	70
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	5	9	12	15	17
Computer System Design and Related Services	0	0	0	0	0
Public Administration	2	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	0	0	0	0	0
Total	23	44	62	77	88
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	18	39	54	67	77
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	8	14	20	24	28
Computer System Design and Related Services	0	0	0	0	0
Public Administration	2	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	12	19	25	31	35
Total	40	71	100	122	140

G.1.6 Persons Employed as Sole Traders and in Employing Businesses Requiring Commercial Office Space, Rockhampton Region - West, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	7	10	13	15	18
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	1	0	0	0	0
Total	8	10	13	15	18
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	9	14	20	24	29
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	0	0	0	0	0
Total	9	14	20	24	29
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0

	2021	2026	2031	2036	2041
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	16	24	33	40	47
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	1	0	0	0	0
Total	17	24	33	40	47

NOT COUNCIL POLICY

Appendix H Projected Commercial Office Floor Space Demand (sqm), by Catchment, 2021 to 2041

NOT COUNCIL POLICY

H.1.1 Projected Commercial Office Floor Space Demand (sqm), Rockhampton North, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	80	73	63	57	57
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	470	236	173	152	155
Insurance and Superannuation Funds	596	413	348	334	349
Auxiliary Finance and Insurance Services	274	0	0	0	0
Property Operators and Real Estate Services	1,583	1,691	1,961	2,282	2,581
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	3,879	4,397	4,980	5,572	6,272
Computer System Design and Related Services	947	1,134	1,326	1,507	1,703
Public Administration	2,616	2,461	2,398	2,453	2,582
Medical and Other Health Care Services	4,849	5,801	6,647	7,423	8,108
Administrative Services	1,708	1,919	2,094	2,499	2,848
Total	17,002	18,125	19,990	22,279	24,656
Employment within Employing Businesses					
Internet Publishing and Broadcasting	117	107	92	83	83
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	99	50	36	32	33
Insurance and Superannuation Funds	126	87	73	70	73
Auxiliary Finance and Insurance Services	55	0	0	0	0
Property Operators and Real Estate Services	326	348	403	468	529
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	3,340	3,775	4,268	4,768	5,359
Computer System Design and Related Services	844	1,007	1,177	1,335	1,507
Public Administration	5,784	5,426	5,281	5,395	5,670
Medical and Other Health Care Services	5,543	6,613	7,566	8,437	9,203
Administrative Services	1,884	2,110	2,300	2,740	3,118
Total	18,118	19,522	21,196	23,328	25,573
Total Employment					
Internet Publishing and Broadcasting	197	180	155	140	140
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	569	286	209	184	188
Insurance and Superannuation Funds	722	500	421	404	423
Auxiliary Finance and Insurance Services	329	0	0	0	0

	2021	2026	2031	2036	2041
Property Operators and Real Estate Services	1,909	2,039	2,363	2,749	3,110
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	7,219	8,172	9,248	10,339	11,630
Computer System Design and Related Services	1,790	2,141	2,503	2,843	3,210
Public Administration	8,400	7,887	7,680	7,849	8,252
Medical and Other Health Care Services	10,392	12,414	14,214	15,860	17,311
Administrative Services	3,592	4,029	4,394	5,240	5,966
Total	35,120	37,648	41,186	45,607	50,230

H.1.2 Projected Commercial Office Floor Space Demand (sqm), Rockhampton South, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	40	53	65	73	77
Internet Service Providers, Web Search Portals and Data Processing Services	93	137	175	199	212
Finance	1,379	593	295	198	186
Insurance and Superannuation Funds	272	144	90	69	68
Auxiliary Finance and Insurance Services	1,347	976	748	640	642
Property Operators and Real Estate Services	4,163	6,254	8,352	10,091	11,527
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	3,956	3,793	3,662	3,735	4,103
Computer System Design and Related Services	368	319	281	275	299
Public Administration	7,154	6,614	6,299	6,344	6,647
Medical and Other Health Care Services	7,414	8,625	9,842	10,983	11,996
Administrative Services	1,468	1,635	1,783	1,834	2,004
Total	27,654	29,143	31,592	34,440	37,761
Employment within Employing Businesses					
Internet Publishing and Broadcasting	2	2	3	3	3
Internet Service Providers, Web Search Portals and Data Processing Services	204	299	380	429	454
Finance	409	174	86	57	54
Insurance and Superannuation Funds	81	42	26	20	20
Auxiliary Finance and Insurance Services	390	279	213	181	181
Property Operators and Real Estate Services	1,162	1,726	2,291	2,752	3,125
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	8,205	7,775	7,462	7,567	8,261
Computer System Design and Related Services	761	652	570	555	599
Public Administration	8,469	7,743	7,333	7,344	7,651

	2021	2026	2031	2036	2041
Medical and Other Health Care Services	10,534	12,119	13,750	15,256	16,568
Administrative Services	1,318	1,450	1,571	1,607	1,745
Total	31,534	32,260	33,685	35,770	38,660
Total Employment					
Internet Publishing and Broadcasting	41	55	68	75	80
Internet Service Providers, Web Search Portals and Data Processing Services	297	437	555	627	666
Finance	1,788	767	382	255	239
Insurance and Superannuation Funds	353	186	116	90	88
Auxiliary Finance and Insurance Services	1,737	1,255	961	820	823
Property Operators and Real Estate Services	5,325	7,979	10,644	12,843	14,652
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	12,161	11,567	11,123	11,302	12,363
Computer System Design and Related Services	1,130	971	850	830	898
Public Administration	15,623	14,356	13,632	13,688	14,298
Medical and Other Health Care Services	17,948	20,744	23,592	26,238	28,565
Administrative Services	2,786	3,085	3,354	3,442	3,749
Total	59,188	61,403	65,277	70,210	76,421

H.1.3 Projected Commercial Office Floor Space Demand (sqm), Mount Morgan, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	148	258	370	458	526
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	24	0	0	0	0
Total	172	258	370	458	526
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0

	2021	2026	2031	2036	2041
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	146	254	363	450	516
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	482	497	510	532	562
Medical and Other Health Care Services	865	1,271	1,630	1,913	2,115
Administrative Services	0	0	0	0	0
Total	1,493	2,022	2,503	2,895	3,193
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	294	512	734	908	1,042
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	0	0	0	0	0
Computer System Design and Related Services	0	0	0	0	0
Public Administration	482	497	510	532	562
Medical and Other Health Care Services	865	1,271	1,630	1,913	2,115
Administrative Services	24	0	0	0	0
Total	1,666	2,280	2,874	3,352	3,719

H.1.4 Projected Commercial Office Floor Space Demand (sqm), Gracemere, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	32	18	8	3	2
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	491	585	673	755	847
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	235	208	187	183	199
Computer System Design and Related Services	88	144	196	237	271
Public Administration	586	275	69	0	0

	2021	2026	2031	2036	2041
Medical and Other Health Care Services	699	962	1,204	1,397	1,540
Administrative Services	188	247	286	315	350
Total	2,320	2,438	2,623	2,890	3,209
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	44	46	49	51	53
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	56	41	34	29	28
Computer System Design and Related Services	11	18	21	21	19
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	423	581	697	774	815
Administrative Services	186	244	269	281	297
Total	720	930	1,070	1,157	1,212
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	32	18	8	3	2
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	535	631	723	807	900
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	291	249	220	213	227
Computer System Design and Related Services	100	163	218	258	290
Public Administration	586	275	69	0	0
Medical and Other Health Care Services	1,122	1,542	1,901	2,171	2,355
Administrative Services	374	491	554	596	646
Total	3,040	3,368	3,692	4,048	4,421

H.1.5 Projected Commercial Office Floor Space Demand (sqm), Bouldercombe, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0

	2021	2026	2031	2036	2041
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	36	78	110	136	155
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	77	132	187	231	266
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	304	469	635	768	875
Total	416	679	932	1,134	1,297
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	243	533	750	921	1,056
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	75	130	184	227	261
Computer System Design and Related Services	0	0	0	0	0
Public Administration	27	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	0	0	0	0	0
Total	345	663	934	1,148	1,317
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	279	612	860	1,057	1,212
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	152	262	372	458	527
Computer System Design and Related Services	0	0	0	0	0
Public Administration	27	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	304	469	635	768	875
Total	762	1,342	1,867	2,283	2,614

H.1.6 Projected Commercial Office Floor Space Demand (sqm), Rockhampton Region - West, 2021 to 2041

	2021	2026	2031	2036	2041
Sole Trader Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	174	249	324	386	441
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	26	0	0	0	0
Total	200	249	324	386	441
Employment within Employing Businesses					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	139	217	296	367	437
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	0	0	0	0	0
Total	139	217	296	367	437
Total Employment					
Internet Publishing and Broadcasting	0	0	0	0	0
Internet Service Providers, Web Search Portals and Data Processing Services	0	0	0	0	0
Finance	0	0	0	0	0
Insurance and Superannuation Funds	0	0	0	0	0
Auxiliary Finance and Insurance Services	0	0	0	0	0
Property Operators and Real Estate Services	0	0	0	0	0
Professional, Scientific and Technical Services (except Computer System Design and Related Services)	312	466	620	754	878

	2021	2026	2031	2036	2041
Computer System Design and Related Services	0	0	0	0	0
Public Administration	0	0	0	0	0
Medical and Other Health Care Services	0	0	0	0	0
Administrative Services	26	0	0	0	0
Total	339	466	620	754	878

NOT COUNCIL POLICY