

Livingstone Shire Centres Assessment

17 April 2025
Livingstone Industry and Centres Assessment

Livingstone Shire Centres Assessment

Client: Livingstone Shire Council

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17 April 2025

Job No.: 60727600

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Quality Information

Document Livingstone Shire Centres Assessment

Ref 60727600

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Date 17 April 2025

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Revision History

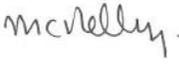
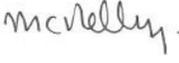
Rev	Date	Details	Approved	
			Name/Position	Signature
0	5-Mar-25	Internal Draft	Matthew Rolley ANZ Practice Director, Urbanism + Planning	
1	05-Mar-2025	Draft for Issue	Matthew Rolley Practice Director - Urbanism + Planning ANZ	
2	17-Apr-2025	Final	Matthew Rolley Practice Director - Urbanism + Planning ANZ	

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1.0 Introduction

1.1 Background and Purpose

The Livingstone Shire local government area (LGA) is projected to experience continued residential and employment growth over the next 20 years. To support this growth and inform future reviews of the Livingstone Shire Planning Scheme 2018 (the planning scheme), Livingstone Shire Council (Council) is planning for future centres in the region.

In August 2024, Council engaged AECOM Australia Pty Ltd (AECOM) and AEC Group Pty Ltd (AEC) to undertake a centres assessment – this project. This project seeks to estimate the demand for retail / commercial uses up to 2046, assess the existing Centres Hierarchy of the planning scheme and make recommendations to update the centres hierarchy based on the findings of the assessment. In addition, an Industry Assessment was also undertaken simultaneously. The outcomes of that work form a separate report.

1.2 Approach

The project was undertaken across five key stages as illustrated in Figure 1 and described in this section.

1. **Identify and categorise existing centres** — Existing and planned centres were identified in collaboration with Council and analysed to understand the role and function of each. This was informed by a site visit in October 2024 and background information provided by Council.
 - **Profile key socio-economic characteristics of each centre** — Key demographic and growth data was reviewed, alongside limited spend data from the Spendmapp platform, to understand the estimated growth in the area to 2046 and the way spending is distributed to different centres across the region.
 - **Forecast demand and supply** — AEC modelled expenditure distribution across the region to determine revenue by gross floor area (GFA) and future retail floorspace demand in each centre. This was compared with an assessment of the indicative capacity of each existing centre to accommodate this demand to understand the balance / shortfall of floorspace across the region at 2046.

- **Preferred Centres Hierarchy 2046** — A preferred centres hierarchy for development up to 2046 was recommended based on the identified balance / shortfall in supply and demand in each centre and across the region, as well as planning principles for centres hierarchies.
- **Planning scheme recommendations** — Based on the findings of the previous tasks, the planning scheme was reviewed and analysed to make recommendations relating to potential planning scheme changes required to support the introduction of the preferred centres hierarchy.

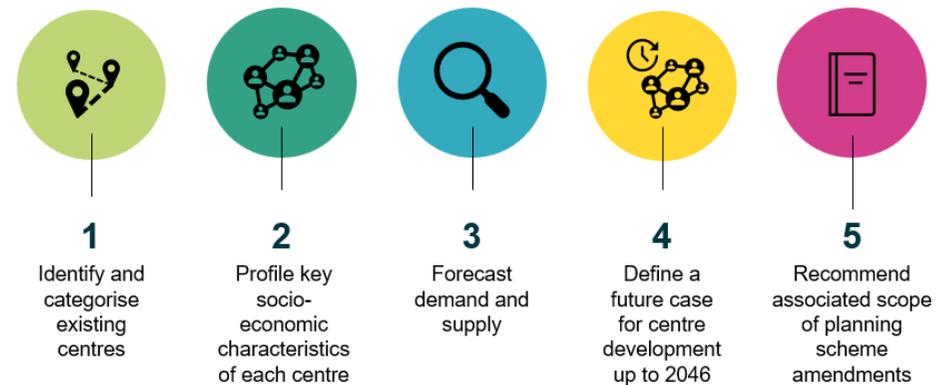


Figure 1: Centres Assessment Approach

1.3 Assumptions and Limitations

General assumptions and limitations are outlined below. See Appendix A for a full list of assumptions that informed modelling.

- Community use floorspace in centres is excluded from this assessment.
- Data limitations did not allow for employment projections to be broken down into ANZSIC codes per centre.
- Spendmapp data is limited to bank transactions and provides local spend, online spend and 'escape' spend data. Transaction data is divided into 14 expenditure categories being Food & Beverages, Housing, Utilities, Transport, Health, Education, Recreation, Clothing, Personal Care, Financial Services, Communications, Tobacco, Alcohol, and Other Goods & Services. However, the data provided did not include a full breakdown of spending per category, so analysis of this data is limited to local, online and escape spend.

2.0 Context and Drivers

AEC has undertaken detailed analysis of the situation and underlying drivers that influence centres in Livingstone Shire. This section provides a summary of the key contextual elements and drivers that have informed this report. Refer to **Appendix A – Livingstone Shire Centres Hierarchy Assessment: Background Report** prepared by AEC for full detail.

2.1 Location Context

Livingstone Shire is located on the coast of Central Queensland, adjoining Rockhampton, Gladstone and Isaac LGAs. Yeppoon, the major population and economic centre for Livingstone, is approximately 40 kilometres (km) north-east of Rockhampton City.

The Central Queensland Regional Plan 2013 recognises Yeppoon as a ‘larger town’ while Rockhampton and Gladstone are the two major regional centres for the Central Queensland region¹.

Rockhampton provides a variety of specialist services as well as major infrastructure including Rockhampton Airport. Due to its location adjoining the LGA and its connectivity with Livingstone, Rockhampton acts as the Principal Centre for Livingstone Shire. This is recognised in the current 2018 Livingstone Planning Scheme.

Settlement in Livingstone is mostly concentrated along the Capricorn Coast around and between the key centres of Yeppoon to the north and Emu Park to the south, as well as areas such as Glenlee, Glendale and Rockyview immediately north of Rockhampton. There are also several townships in rural areas, mostly along the Bruce Highway.

The Bruce Highway, Yeppoon Road and Emu Park Road are the key road connections for Livingstone Shire providing access to Rockhampton and other destinations north and south. Tanby Road is the key connector between Yeppoon and Emu Park, while the Scenic Highway provides a local and scenic route along the coast. There is an approximately 20-minute drive between Yeppoon and Emu Park.

¹ It is noted that the Central Queensland Regional Plan (CQRP) was under review at the time of this report, including the industrial portion of the CQRP. No outcomes of the technical analysis informing the CQRP were available at the time of this report.



Figure 2: Livingstone Shire and surrounding region

2.2 Population and Demographics

In 2023, the total population of the LGA was 41,906 people (ABS, 2024). The majority of the population, 21,688 or 51.8%, resided in the Yeppoon SA2.

Population projections for Livingstone Shire show a 51% increase in residents between 2023 and 2046 (QGSO, 2023) (see Figure 3). This translates to nearly 21,500 additional residents, equivalent to around 8,580 new homes, assuming an average household size of 2.5 persons.

Yeppoon (SA2)² is projected to account for most of the population growth in Livingstone (63.5%), increasing by 13,631 people to a total population of 35,319 people in 2046. Emu Park (SA2)³ is projected to account for another 21.6% of the Livingstone population growth, increasing by 4,633 people to a total population of 10,750 people in 2046.

Compared to Queensland, Livingstone has:

- a higher proportion of detached dwellings (83.5% compared to 72.1%);
- relatively high home ownership, with roughly two-thirds of all homes being owner-occupied;
- more couples without children and less families with children;
- a higher proportion of residents who are 65 years of older (21% compared to 17%), particularly in Emu Park (28.2%); and
- a smaller proportion of 15 to 34 year olds (21% compared to 26%).

2.3 Tourism

Livingstone has experienced inconsistent visitation in recent years with spikes in 2017, 2019 and 2021 and significant impacts from the COVID-19 pandemic between 2020 and 2022. Despite this volatility, visitor numbers rebounded to approximately 700,000 annual visitors, consisting of mostly daytrip or domestic overnight trips. Steady growth in total tourists is anticipated, with a projected 63.4% increase, reaching a total of 1.2 million visitors by 2046.

² The Yeppoon SA2 includes the localities of Pacific Heights, Barlows Hill, Meikleville Hill, Inverness, Barmaryee, Yeppoon, Cooee Bay, Taranganba, Lammermoor, Hidden Valley, Taroomball, Rosslyn, Mulambin and Causeway Lake.

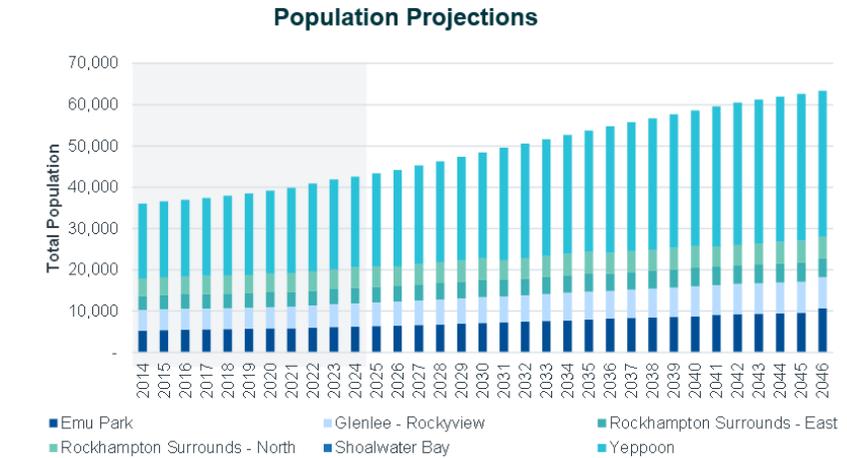


Figure 3: Population Projections (AEC, 2025)

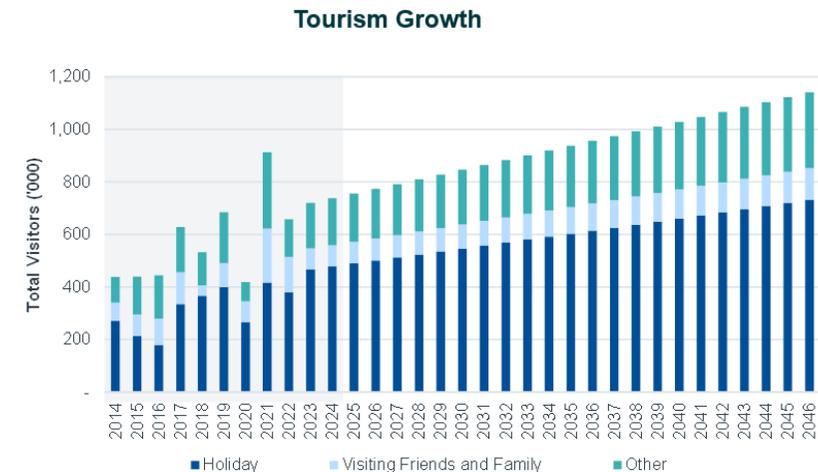


Figure 4: Livingstone Shire Visitors by Reason for Visit, 2014 to 2046 (AEC, 2025)

³ Emu Park (SA2) includes the localities of Kinka Beach, Emu Park and Zilzie.

2.4 Employment and Income

In 2023, there were 11,413 full-time equivalent (FTE) jobs across the Livingstone Shire (by place of work).

The top six industries of employment were Education and training (1,553 FTE), Health care and social assistance (1,425 FTE), Construction (1,324 FTE), Accommodation and food services (1,297 FTE), Retail trade (1,171 FTE), and Public administration and safety (1,094 FTE).

Yeppoon is estimated to have the highest employment in the LGA with 7,177 FTE jobs, most of which are in the accommodation and food services and retail trade industries.

Livingstone is also home to many who work outside the region, with residents commonly commuting to Rockhampton or working on a fly-in fly-out or drive-in drive-out basis. Data indicates that for every FTE position employed and living within Livingstone Shire, an additional 0.66 reside in Livingstone and are employed outside the region.

Employment projections indicate that the number of people employed and living in Livingstone will increase to 25,732 by 2046. This represents an average annual employment growth rate (by Place of Usual Residence (POUR)) of around 1.3% over the forecast period. The sectors with the greatest growth rates from 2023 to 2046 are Education and Training (2.5% CAGR), Mining (2.1% CAGR), and Public Administration and Safety (2.0% CAGR).

Total income of employed residents is forecast to grow around 1.4% per annum over the forecast horizon, reaching \$2.1 billion (in real 2024 terms) by 2046. Yeppoon residents are expected to remain the primary source of income, accounting for 54.9% of total income. The primary driver of income growth is anticipated to come from the mining industry, which is one of the fastest-growing industries by employment and has the highest average weekly earnings (ABS, 2022).

2.5 Catchment Area Expenditure

AEC sourced two independent data series that provide information on aggregate spending capacity of Livingstone residents – Spendmapp data and ABS data relating to aggregate retail spending.

It is estimated that the total spending capacity of Livingstone residents surged from 2021 to 2023, before declining to \$1.2 billion in 2024. Total spending capacity is forecast, based on projections of total income of employed Livingstone residents, to return to growth in 2025, rising to \$1.6 billion by 2046 – a 35.6% increase over the forecast period.

Expenditure by Livingstone residents is broken down into three spending categories: local spend, non-local spend, and online spending. The share of local spending is expected to see a marginal decline to approximately 41% as the share of online spending increases to approximately 26% by 2046.

Livingstone residents' local spend is estimated to have increased from \$422 million in 2021 to \$490 million in 2024, a cumulative increase of 16.2%. Based on total spending capacity growth and the relative share of local expenditure, local spend is expected to rise strongly to \$658 million by 2046 – a 34.1% rise over this period. Yeppoon residents account for the majority of expenditure, with 54.9% of total Livingstone resident expenditure, followed by Emu Park with 11.9%.

Total visitor expenditure with merchants inside Livingstone, as reported by Spendmapp, was estimated at \$186 million in 2024. This is expected to grow substantially to \$345 million by 2046, representing an 85% cumulative increase over this period.

In 2024, total expenditure with merchants within Livingstone was estimated to have reached \$677 million, with 72.5% attributed to local residents. Growth, supported by both local and visitor expenditure, is forecast to just break the \$1 billion barrier by 2046, representing a 48.2% increase over this period. This growth is a key driver of retail floorspace demand and highlights the need to assess the retail supply capacity within Livingstone to accommodate such demand.

3.0 Existing Centres

This section profiles the existing centres in Livingstone Shire being:

- Yeppoon Major Centre (area depicted in Figure 12)
- Emu Park Local Centre (area depicted in Figure 19)
- Taranganba Neighbourhood Centres (area depicted in Figure 24)
- Rosslyn Bay Tourism Centre. (area depicted in Figure 29)

Each centre has been assessed in terms of its current role and function compared to its planned role and function including strengths, challenges and opportunities. An indicative capacity assessment has also been undertaken based on the current planning scheme and assumed plot ratios. This assessment is high level only and is not representative of actual capacity of each individual site available for development, as no allowance for specific site constraints has been considered.

This section also considers the existing planning scheme hierarchy which includes existing and planned future centres.

3.1 Planning Scheme Centres Hierarchy

The planning scheme's Strategic Framework sets out the long-term strategic plan for Livingstone Shire, including the intended settlement pattern and Centres Hierarchy. The Centres Hierarchy includes both existing centres and investigation areas (IAs), defining their respective roles, intended mix of uses and contributions to the network of centres in the region.

Centre Place Types

The Strategic Framework defines the Centre Place Types as detailed in Table 1 including: Major Centre, District Centre, Local Centre, Neighbourhood Centre and Specialised Centre. Other relevant Place Types include Tourism and Townships.

It is noted that Specialised Centre place types provide for large format retail development along with low impact industry activities (service industry) and specialty businesses. Existing Specialised Centre land is located in Yeppoon close to Yeppoon Road and Tanby Road. While these areas can accommodate centre activities, they have not been included in detail in the

assessment of centres land as they may be taken up by non-centre activities, due to their specialised function, and they do not strictly align with the economic data available. This approach provides a conservative estimate of centre land supply so as not to include land that may not be used for centre activities. Specialised Centre land has also been considered as part of the concurrent Industry Assessment.

Similarly, Township zones provide a specific function for rural communities and have been excluded in the assessment of centres land.

Centres Hierarchy

The planning scheme recognises the regional relationship with Rockhampton and acknowledges Rockhampton as the Principal Centre for the Region. No Principal Centre is located or planned in Livingstone Shire.

Yeppoon is the Major Centre for Livingstone Shire being the highest order centre with the most diverse mix of uses.

Currently, Emu Park Local Centre is the next most diverse centre, servicing the southern portion of the Shire. However, the Strategic Framework identifies an Investigation Area for a potential future District Centre in Emu Park (IA2) to the west of the existing centre. This future District Centre is intended to be in addition to the existing centre and cater for larger floorplate uses such as discount department stores and full-line supermarkets.

Taranganba Neighbourhood Centre is the only lower order centre in Livingstone, providing local convenience retail to the surrounding neighbourhoods.

Rosslyn Bay is a specialised tourism centre acting as a destination and gateway to the Keppel Group of Islands. The planning scheme states that Rosslyn Bay is for uses aligned with the marine, dining, tourist and convenience sectors.

The Strategic Framework also identifies a series of Neighbourhood Centre Investigation Areas (IAs), aligned with future residential growth corridors or previous development proposals.

Neighbourhood Centre Investigation Areas

Neighbourhood centre Investigation Areas generally align with the following current and lapsed Development Approvals (DA):

- Hidden Valley IA4: The Pineapple Patch Area 1 – Preliminary Approval including a 1,500 m² neighbourhood centre (development permit D318-2006).
- Pacific Heights IA5: DA for 2,000 m² neighbourhood centre (development permit D119-2016) – lapses May 2025.
- Taroomball IA6:
 - Nautica Breeze Estate / Tanby Road Local Plan – Preliminary Approval (development permit D63-2015) with a maximum 2,500 m² neighbourhood centre incorporated into the Local Plan. Related to the Preliminary Approval are Reconfiguring a Lot development permits D324-2021 and D11-2024. The centre has not been pursued at this stage.
 - DA for 2,762 m² neighbourhood centre at Keppel Bay Estate, Lakeside Drive (development permit D590-2012) – lapsed.
- Zilzie IA12: DA for ~1,500 m² neighbourhood centre at Seaspray Estate - Svendsen Road (development permit D119-2009 by court order) – lapsed.
- Zilzie IA13 Great Barrier Reef International Resort Master Plan included a centre. Additional stages of this development have not advanced, with some lands zoned for residential development.

Other Relevant DAs

Other notable development approvals and applications are summarised below.

- Dawson Road Local Plan – Preliminary approval for neighbourhood centre (Glenlee in the Northern Corridor) (development permit D63-2015)
- Cooe Bay DA for ~1,000 m² neighbourhood centre (development permit D202-2014) – lapsed. Figure 24 shows the location of this site.
- Taranganba Road, (cnr Tanby Road), Taroomball DA for ~5,000 m² centre currently under assessment (development permit D246-2024).

Table 1: Centre place types of the planning scheme (Source: Livingstone Planning Scheme 2018 Strategic Framework)

Place Type	Definition	Existing Locations	Investigation Areas (IA)
Major Centre	The Major Centre accommodates the highest mixture and concentration of centre activities which cater for shopping, business, entertainment and community needs. Short-term and long-term residential dwelling options developed at medium densities are located within this centre where it is located above ground level or where it supports or enhances the strength and vibrancy of the centre. The scale and intensity of development, the mixture and concentration of land uses and the role and function of the centre, attracts visitors in larger numbers and from a wider trade catchment area compared to that of other centres in the planning scheme area.	Yeppoon	
District Centre	A district centre will accommodate a mixture of centre activities which cater for shopping, business, entertainment and community needs. The mixture and concentration of land uses is capable of servicing a trade catchment area of 5,000 to 8,000 households. Short-term and long-term residential dwelling options developed at medium densities are located within these centres where they support or enhance the strength and vibrancy of the centre.	N/A	Emu Park (IA 2)
Local Centre	Local centres accommodate a mixture of centre activities primarily focussed on providing convenience goods and services for 'week to week' needs and community focussed activities. The size and scale of local centres and the mixture of land uses is capable of servicing a trade catchment area of between 3,000 to 5,000 households. Short-term and long-term residential dwelling options developed at medium densities are located within local centres.	Emu Park	
Neighbourhood Centre	Neighbourhood centres accommodate a limited mixture of centre activities primarily focussed on providing convenience goods and services for 'day to day' needs. The size and scale of neighbourhood centres and the mixture of land uses is capable of servicing a trade catchment area of approximately 1,500 households. Note — neighbourhood centres are not shown on the strategic framework maps. They may be identified by zoning, however, their small-scale nature, limited number and mixture of uses, and convenience function means that they may potentially be accommodated at specific sites within urban places, new urban places, or future urban places.	Taranganba ⁴	Hidden Valley (IA 4) Pacific Heights (IA 5) Taroomball (IA 6) Zilzie (Seaspray Estate – IA 12) Zilzie (Great Barrier Reef International Resort Estate – IA 13)
Specialised Centre	A specialised centre accommodates a limited range of business activities including showrooms, large format shops, service industry, and other specialty businesses.	Hidden Valley Yeppoon	

⁴ Note: The Strategic Framework also references Taroomball (Keppel Bay Estate) as an existing neighbourhood centre. This centre was approved as part of a development application but has not

been constructed. A subsequent residential subdivision approval was granted over the site and the site is zoned Low Density Residential.

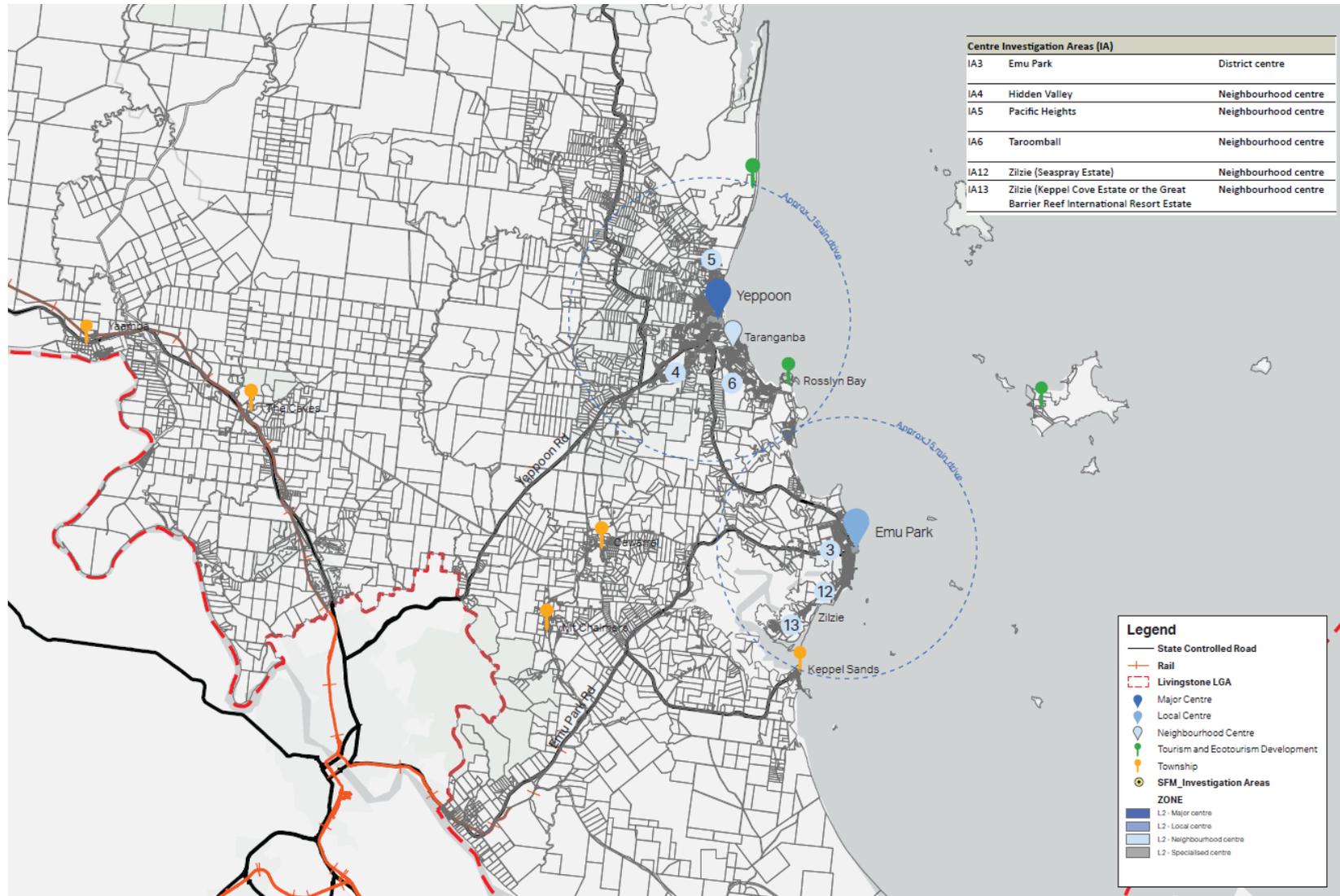


Figure 5: Existing and Planned Centre Places (Livingstone Shire Planning Scheme 2018)

3.2 Yeppoon

Yeppoon is the largest centre in the region with the most diverse mix of uses including retail, food and beverage, services, commercial and tourist activities, and functioning as the major centre for the region.

It has two distinct areas being the retail and commercial tenancies centred along James Street, including Bay Plaza at the western end of James Street, and Yeppoon Central Shopping Centre to the southwest along Park Street.

The Major Centre Commercial Transition Precinct in the Medium density residential zone around the centre (see Figure 12) allows for commercial uses within existing buildings.

Table 2: Yeppoon centre details

Planning Scheme type / zone	Major Centre
Observed role and function	Major Centre
Approx. zoned land area	38 hectares (ha)
Approx. existing GFA	60,000m ² comprising approx. 39,000m ² retail, 11,000m ² commercial and 10,000m ² community GFA. Approx. 6,000m ² is vacant.
Types of businesses	Two supermarket anchored shopping centres, retail, food and beverage, office, services, community centres.
Hours of activity	<ul style="list-style-type: none"> • Day trade includes all uses • Evening trade for hospitality uses, shopping centres (weekdays)
Connectivity	<ul style="list-style-type: none"> • Bus services along Park Street, James Street and Queen Street connecting to nearby suburbs, Rosslyn Bay, Emu Park and Rockhampton • Significant car parking available on street, in shopping centres and in the public multi-deck Yeppoon Town Centre Carpark

Urban character

- Fine-grain main street retail tenancy character along James Street and Anzac Parade
- Separation between Yeppoon Central Shopping Centre and the primary area around James Street
- Is walkable between centres with some shade afforded
- Distance not ideal for trolleys or carting large items or goods



Figure 6: Bay Plaza Shopping Centre



Figure 7: James Street



Figure 8: James Street



Figure 9: Yeppoon Town Hall



Figure 10: Yeppoon Central Shopping Centre



Figure 11: Anzac Parade & James Street

Strengths

- Performs its role as a Major Centre for the region
- Provides a variety of business and services, community facilities, commercial, residential accommodation
- Walkable centre along James Street, Normanby Street and Anzac Parade
- Public realm and green space along coast and Beaman Park
- Capacity to accommodate growth and reinforce its role / realise potential as a Major Centre
- Large vacant sites with development opportunity
- Large multi-deck carpark and on-street parking

Challenges

- Two distinct areas – James Street/Normanby Street activities and Yeppoon Central shopping centre
- Large portion of area occupied by dwelling houses with ancillary improvements
- Car dominated streets and development proposals

Opportunities

- Maintain and reinforce the Major Centre role of Yeppoon (i.e. do not introduce new higher order centres that could undermine Yeppoon)
- Continue to allow for re-use of residential buildings and confirm edge of centre development policies
- Ensure development outcomes contribute to the character of James Street as the key retail street in the centre
- Encourage redevelopment of dwelling houses on centre zoned land

Indicative Capacity

The findings of a high-level assessment of development capacity in Yeppoon are summarised in Table 3. This takes into account vacant sites as well as potential redevelopment sites where the lot size, current use, age of building and ownership present a possible incentive for redevelopment.

Note this does not include any sites included in the Major Centre Commercial Transition Precinct or existing commercial uses outside the Major Centre zoned land. Nearby Specialised Centre land has also been excluded.

In order to understand the potential GFA capacity, an assumed plot ratio has been identified. The planning scheme currently identifies a maximum site coverage of 80% for the Major Centre zone. Typically, larger sites have lower plot ratios than smaller sites related to the types of development that occur. Given the number of larger sites in Yeppoon, a plot ratio of 50% has been assumed, allowing for spaces that do not contribute to GFA including parking, circulation, services and landscaping.

Table 3: Yeppoon Capacity Assessment

Type	Indicative Capacity (m ²)
Existing	
Developed GFA - Occupied	56,493
Developed GFA - Vacant	5,986
Total Developed GFA	62,479
Future Potential	
Vacant Land	12,177
Sites with redevelopment potential	5,391
Sites with redevelopment potential where amalgamated	1,996
Total Existing and Potential	82,043

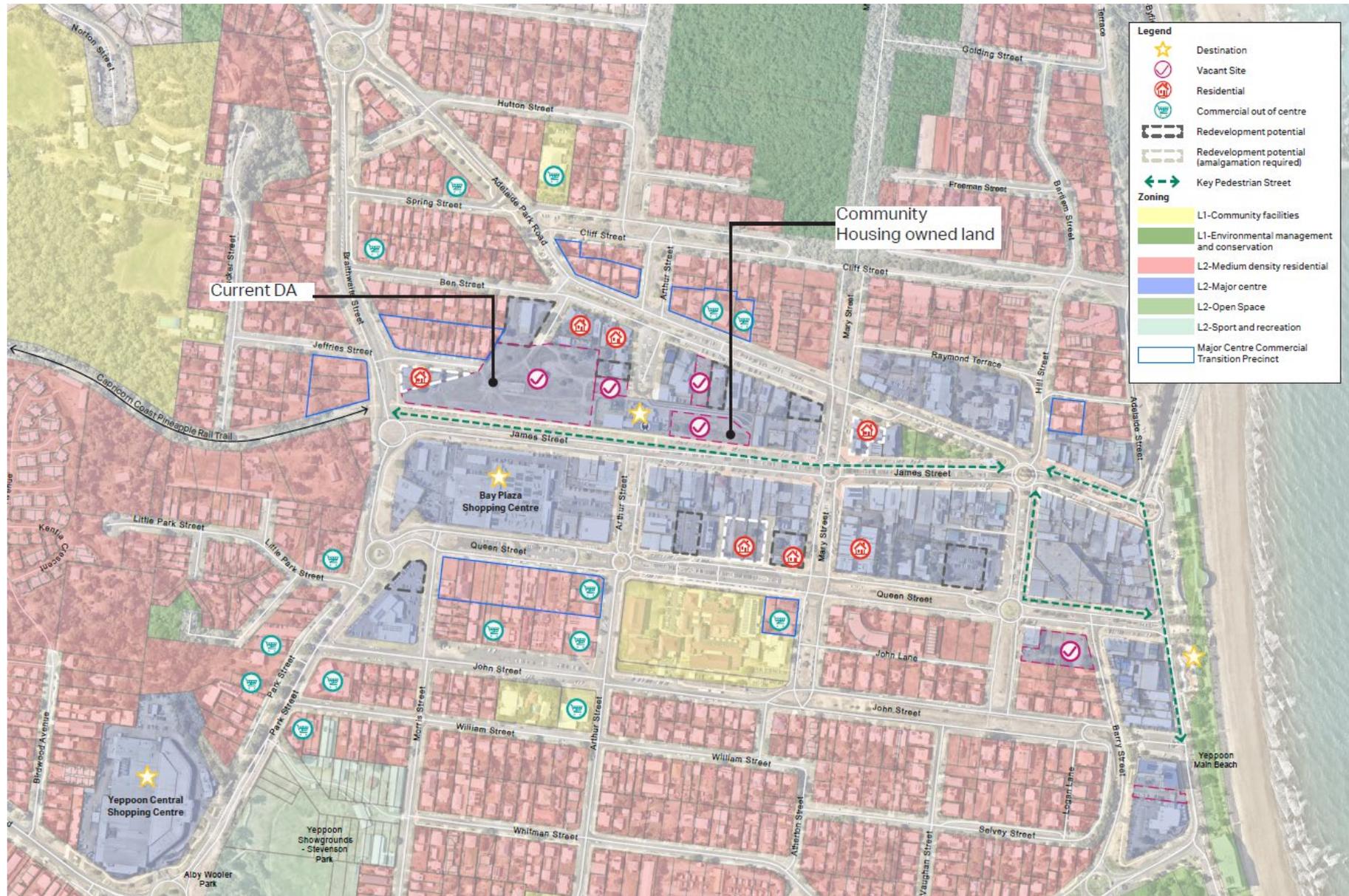


Figure 12: Yeppoon Major Centre Analysis Map

3.3 Emu Park

Emu Park is the key centre for coastal suburbs to the south of Livingstone Shire. The centre has a small, coastal centre feel and serves both locals and visitors. Hill Street is the main retail street in the centre while the remainder of the centre includes a relatively high proportion of residential development.

Table 4: Emu Park centre details

Planning Scheme type / zone	Local Centre
Observed role and function	Small local centre with a walkable village feel. Significant proportion of residential development.
Approx. zoned land area	6 ha
Approx. existing GFA	10,250 m ² including approx. 6,516 m ² of retail GFA.
Types of businesses	Supermarket (Drakes), specialist stores, cafes, hotel, small-scale commercial, and community uses.
Hours of activity	<ul style="list-style-type: none"> Day trade includes all uses Evening trade for hospitality uses, supermarket
Connectivity	<ul style="list-style-type: none"> Bus services at Pattison Street connecting suburbs between Keppel Cove to the south and Yeppoon to the north, as well as to Rockhampton Significant car parking available on street
Urban character	<ul style="list-style-type: none"> Local village feel with curated streetscape design along Hill Street Residential nature on Archer Street Mixed nature on Pattison Street and Emu Street



Figure 13: Drakes Supermarket, Emu Street



Figure 15: Pine Beach Hotel Motel



Figure 17: Residential uses in the centre



Figure 14: Streetscapes on Hill Street



Figure 16: Speciality Stores



Figure 18: Centre car parking

Strengths

- Currently provides local convenience needs - supermarket, specialist stores, cafes and small-scale commercial
- Capacity to accommodate growth and opportunity to realise potential as a Local Centre
- Streetscape improvements on Hill Street and Emu Street
- Walkable neighbourhood with good connections to local community facilities and parks
- Some adjoining lots with consolidated ownership – may increase development potential
- Proximity to Bell Park, parkland, community facilities and proximity to the beach provide a unique feel and amenity

Challenges

- Fragmented ownership
- Dispersed area
- Large portion of area occupied by dwelling houses with ancillary improvements (see Figure 19)
- Ability to extend to dwelling houses may undermine centre zoning
- Low/no uptake of adjoining medium density land to support centre

Opportunities

- Consolidate existing centre uses
- Encourage additional residential diversity and density to support the centre
- Maintain the character of the existing centre while allowing it to meet its Local Centre potential

Indicative Capacity

The findings of a high-level assessment of development capacity in Emu Park are summarised in Table 3. This takes into account vacant sites as well as potential redevelopment sites where the lot size, current use, age of building and ownership present a possible incentive for redevelopment.

In order to understand the potential GFA capacity, an assumed plot ratio has been identified. The planning scheme currently identifies a maximum site coverage of 80% for the Local Centre zone. Considering the smaller sites in Emu Park, a plot ratio of 65% has been assumed, allowing for spaces that do not contribute to GFA including parking, circulation, services and landscaping.

Table 5: Emu Park Capacity Assessment

Type	Indicative Capacity (m ²)
Existing	
Developed GFA	6,516 (6,321 occupied)
Future Potential	
Vacant Land	3,554
Sites with redevelopment potential	892
Sites with redevelopment potential where amalgamated	3,528
Total	14,490



Figure 19: Emu Park Local Centre Analysis Map

3.4 Taranganba

Cedar Park Shopping Centre at Taranganba provides for convenience needs for the local neighbourhood. The nearby Cooee Bay Accommodation precinct also allows for small scale centre activities.

Table 6: Taranganba centre details

Planning Scheme type/ zone	Neighbourhood Centre
Observed role and function	Neighbourhood Centre
Approx. zoned land area	0.9 ha
Approx. existing GFA	2,107 m ²
Types of businesses	Small-scale local businesses, convenience grocery, retail, take away and café.
Hours of activity	<ul style="list-style-type: none"> • Day trade includes all uses • Evening trade for takeaway uses
Connectivity	<ul style="list-style-type: none"> • Bus services at Swordfish Avenue connecting local suburbs to Yeppoon • Car Parking on site
Urban character	<ul style="list-style-type: none"> • Vehicle focused convenience centre

Strengths

- Successful and well-utilised Neighbourhood Centre
- Provides convenience needs – convenience supermarket, specialist stores and take-away

Challenges

- No tenancy vacancies observed on site
- Limited opportunity for further development

Opportunities

- Maintain existing role and function of the centre
- Meet any additional Neighbourhood Centre demand through new appropriately located Neighbourhood Centre(s) – see following sections for further analysis.



Figure 20: Cedar Park Shopping Centre



Figure 22: Cedar Park Shopping Centre



Figure 21: Rear Carpark



Figure 23: Cedar Park Shopping Centre

Indicative Capacity

The Taranganba neighbourhood centre is a single site operating successfully. While the existing development does not maximise the GFA on the site (a significant portion of the site is carparking), given the age of the building(s) and successful operation, it is not likely to be redeveloped before 2046.



Figure 24: Taranganba Neighbourhood Centre Analysis Map

3.5 Rosslyn Bay

Rosslyn Bay is a tourism and marine focused centre and mixed use precinct including a marina, restaurants, residential and marine related uses situated in the locality of Rosslyn. There is a mix of tenures in this location including private freehold, lands lease, reserve, and state-owned land.

The identified areas for centre activities are located within the Harbour Business and Tourism Sub-precinct, the Marina Accommodation and Marine Retail Sub-precinct (shop only), the Marina Business and Tourism Sub-precinct and the Marina Tourist Accommodation and Business Sub-precinct in the Rosslyn Bay Precinct.

Table 7: Rosslyn Bay centre details

Planning Scheme type/ zone	Tourism
Observed role and function	Tourism and marine specialised centre
Approx. zoned land area	29 ha (in precincts where centre activities can occur)
Approx. existing GFA	1,509 m ²
Types of businesses	Marine related businesses, restaurants, convenience
Hours of activity	<ul style="list-style-type: none"> Day trade includes all uses Evening trade for restaurants
Connectivity	<ul style="list-style-type: none"> Bus service connecting to Yeppoon and Emu Park Car Parking on site
Urban character	<ul style="list-style-type: none"> Harbour and marine activities

•



Figure 25: Restaurant at Rosslyn Bay



Figure 27: Coast Guard



Figure 26: Marina



Figure 28: Vacant, planned residential land

Strengths

- Capacity to accommodate growth on vacant land to meet marine and tourism needs
- Unique location and function

Challenges

- Isolated from adjoining residential development and low uptake of residential uses within existing marina/harbour
- Specialised role - centre uses limited to shop or food and drink outlet

Opportunities

- Revisit the masterplan and planning scheme to consider a wider range of uses to support the marine industry and reinforce tourism

Indicative Capacity

Planning for Rosslyn Bay has been informed by a State Government masterplan, reflected in the planning scheme zone precincts and sub-precincts, that present a narrow range of potential uses and development outcomes. While there is capacity in Rosslyn Bay, this is not considered able to cater for demand from other centres due to the specialised function and isolated location of Rosslyn Bay.

Based on an assumed plot ratio of 40%, the indicative capacity of Rosslyn Bay for centre activities is summarised in Table 8.

Table 8: Rosslyn Bay Capacity Assessment

Type	Indicative Capacity (m ²)
Developed GFA	1,509 (1,464 occupied)
Sites with redevelopment potential	7,660
Total	9,169



Figure 29: Rosslyn Bay Analysis Map

4.0 Forecast Demand and Supply

AEC has undertaken detailed analysis of the economic capture and estimated future demand for commercial and retail GFA. This section provides a summary of the key outcomes of this analysis. Refer to **Appendix A – Livingstone Shire Centres Hierarchy Assessment: Background Report** prepared by AEC for full detail.

It is acknowledged that Rockhampton acts as the Principal Centre for the region and Livingstone Shire residents will spend a proportion of their income in Rockhampton, particularly for specialist goods not available within the Livingstone LGA. However, this analysis is limited to expenditure within the Livingstone LGA.

Broadly, the analysis distributed expenditure in the region to the existing centres and then forecasted future retail floorspace demand. The analysis treated Yeppoon Major Centre as three distinct areas being Yeppoon Shopping Centres, Yeppoon James Street and Bay Plaza Yeppoon.

4.1 Expenditure Distribution

The provided Spendmap data was compared with an analysis process that mapped expenditure to existing centres to ensure the validity of assumptions and outcomes. Expenditure was distributed to different centres based on the inherent locational advantages of each centre and their ability to serve each SA2 region, as well as the current condition and retail experience offered by each centre. The process involved analysis of the following factors:

- Convenience factor / “attractiveness” including:
 - Location of the centre;
 - Proximity to other centres;
 - Range of retail / commercial offerings;
 - Retail expenditure breakdown by category;
 - Scale of retail / commercial offerings;
 - Relative competition.
- Locality condition rating, including:
 - Built form and character;
 - Building age and condition;
 - Availability of car parking and other amenities.

The analysis found that the majority of retail spending by residents and visitors from every region is directed towards the Yeppoon Major Centre, which is expected given its breadth of retail offerings. Some centres have limited spending categories, thereby directing residents to the Yeppoon Major Centre.

Emu Park residents and visitors are estimated to spend a sizeable 29% of their retail expenditure at the Emu Park local centre, while other residents in the region spend less than 5% of their expenditure there. This highlights the convenience, location and proximity of the Emu Park Local Centre for Emu Park residents, especially for main weekly shopping for groceries and household essentials, which is typically done at a nearby centre with a supermarket. This trip is considered a necessity and preferred to be done conveniently, cheaply and efficiently. Overall, this distribution of geographic

and inherent locality preference is assumed to remain fixed over the evaluation period.

Centre Locality "Attractiveness" Coefficient

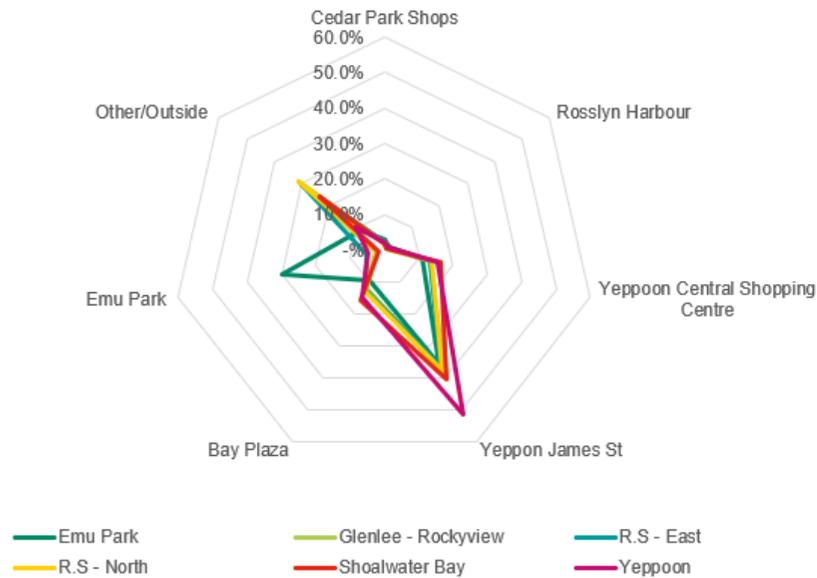


Figure 30: Centre locality "attractiveness" coefficient by SA2 (Source: AEC)

In terms of 'locality condition rating', each centre was assigned a rating out of 10. The average score was 6.8, with Bay Plaza Shopping Centre scoring the highest rating of 10 due to recent upgrades and Cedar Park Shopping Centre scoring a low of 5.

These factors were used to conclude the final distribution of expenditure by locality for 2024 as follows:

- Yeppoon Major Centre:** Captures approximately 72.6% of the region's spend, equating to \$491 million. This centre attracts the largest share of expenditure across all regions due to its extensive and diverse range of retail services, making it the key centre for activity. Of the three sections at Yeppoon, James Street dominates retail activity, capturing 43.1% of the total expenditure in Livingstone alone.
- Emu Park Local Centre:** Captures approximately 8.2% of the region's spend, equating to \$55 million. A significant portion of this expenditure comes from its own residents, given the relative distance from other centres, making it a convenient option for local shopping needs.
- Taranganba Neighbourhood Centre:** Captures approximately 2.3% of the region's spend, equating to \$16 million. This centre has limited retail offerings and is very close to the Yeppoon Major Centre, which reduces its share of the overall expenditure.
- Rossllyn Bay:** Captures approximately 1.5% of the region's spend, equating to \$10 million. This centre focuses on niche activities and does not have a supermarket, which limits its share of the overall expenditure.
- Other/Outside Areas:** Approximately 15.5% of the total spend within the LGA is assumed to be captured outside these centres. This accounts for the majority of spending on bulky items and transport, as well as some spending on professional services, as categorised by Spendmapp.

4.2 Revenue by Gross Floor Area

In terms of aggregate revenue per retail floorspace, the average across the centres is indicated to be \$8,359 per GFA. Bay Plaza Yeppoon is estimated to show the largest revenue per GFA, which is to be expected given its prime location, diverse retail offerings, and relatively new building condition.

AEC researched benchmark data (including both published data and confidentially commercial data available to AEC) to establish a reasonable benchmark gross revenue per GFA for regionally-based retail in regional Queensland. This research indicates an expected level of \$6,600 gross revenue per sqm GFA in 2024 provides an expected level of turnover.

The analysis indicates that all existing centres in Livingstone LGA are performing at or above this benchmark level of revenue expected to support viability.

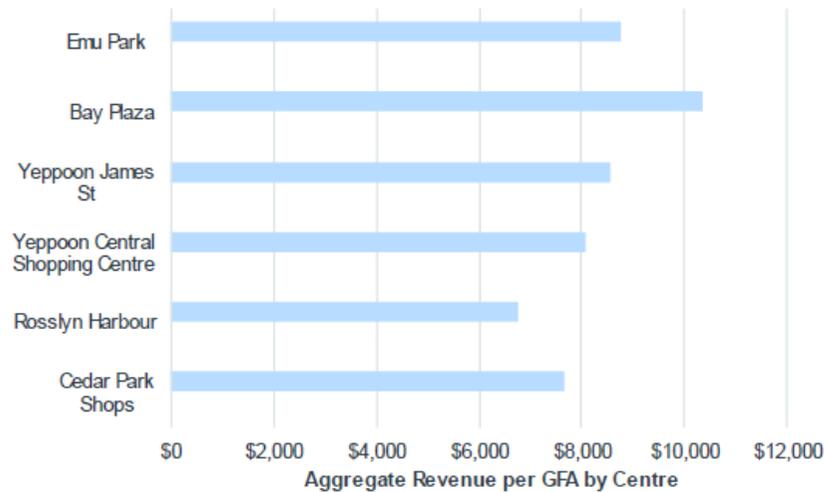


Figure 31: Aggregate revenue per GFA by Centre, 2024 (Source: AEC)

4.3 Future Retail Floorspace Demand Analysis

AEC forecasted demand for retail floorspace at each designated centre. This forecast is based on current trading patterns and anticipates that demand will increase in proportion to the aggregate expenditure received at each centre. Understanding these dynamics is essential for ensuring that retail infrastructure can meet future needs and support regional growth.

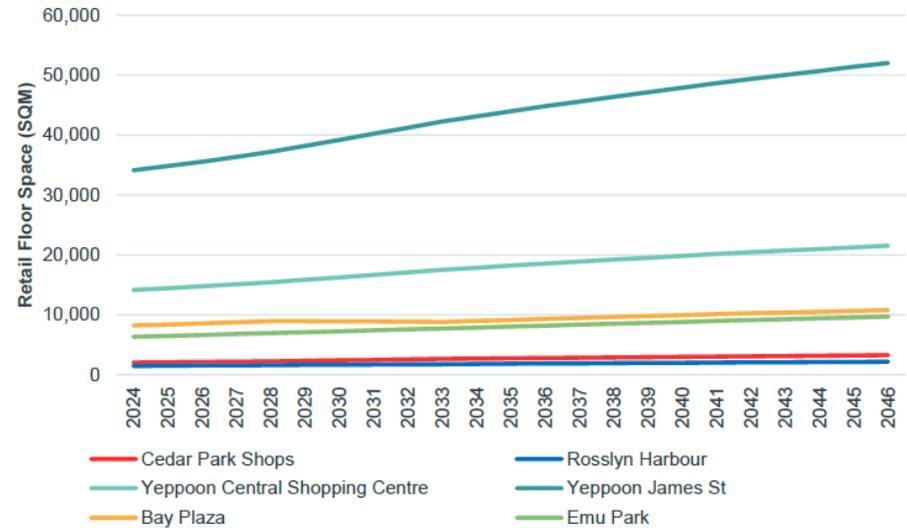


Figure 32: Forecast retail demand GFA (Source: AEC)

Demand for retail floorspace at the six designated centres is projected to rise from an estimated 66,321 m² in 2024 (currently occupied GFA) to **99,489 m²** in 2046. This represents a significant increase of 33,168 m² or 50% over the forecast period. The primary drivers of this demand will be the three centres in Yeppoon, followed by Emu Park, reflecting their roles as key retail hubs in the region.

4.4 Supply Scenarios

A series of supply scenarios have been explored to understand the relationship between the estimated demand at 2046 (**99,489 m²**) and potential supply based on the existing centres hierarchy.

The indicative capacity of each centre (presented in Section 3.0) has been analysed against forecast demand to identify the year at which the centre's GFA reaches capacity and the demand / supply balance at the end of the forecast period, considering the below scenarios.

1	2	3
Existing GFA (no additional development)	Development of Vacant Land in Centres	Development of all Indicative Capacity
Assumes: <ul style="list-style-type: none"> Fixed developed GFA No expansion 3% vacancy rate Spillover effect Fixed external supply and demand 	Scenario 1 plus indicative capacity of vacant land in existing centres.	Scenario 2 plus indicative capacity of redeveloped land in existing centres.

These scenarios are also compared to the Ultimate Scenario based on the current planning scheme strategic framework.

The model prepared by AEC includes a series of assumptions which are detailed in **Appendix A** — Livingstone Shire Centres Hierarchy Assessment: Background Report. Of particular note, this includes a 'spillover effect' assumption, which means that once a given centre reaches maximum occupancy (3% churn), it is assumed that customers will begin to prefer the next nearest centre that is equal or higher on the centre hierarchy. This includes absorption of demand from Bay Plaza and Yeppoon Central Shopping Centres into James Street at Yeppoon. It is important to note that spending at Emu Park, Rosslyn Bay, and 'Other/Outside' have not been assumed to "spill over" to the Yeppoon Major Centre.

The results of the analysis are summarised in this section.

Scenario 1 — No additional development

The results of the analysis are presented in Table 9 and found:

- Capacity Constraints:** All centres are expected to reach capacity by 2025, with the exception of James Street and Bay Plaza in Yeppoon. These centres are anticipated to reach capacity in 2028 and 2027, respectively, as they have vacant developed GFA available to absorb additional demand.
- GFA Deficit:** By 2046, all centres are forecast to experience a deficit in available (existing) built form capable of meeting demand. This indicates that demand for retail floorspace will incentivise development of additional retail / commercial facilities in all centres during the forecast horizon, provided suitable appropriately zoned land exists within the planning scheme.

Table 9: Retail GFA demand & supply forecasts by centre – Scenario 1 (Source: AEC)

Centre	Developed GFA (m ²)	Currently Occupied GFA (m ²)	GFA Demand at 2046 (m ²)	Balance at 2046 (m ²)	Demand reaches capacity
Yeppoon — Central Shopping Centre	14,900	14,155	21,530	-6,630	2025
Yeppoon — James Street	37,917	34,125	52,055	-14,138	2028
Yeppoon — Bay Plaza	9,662	8,213	10,790	-1,128	2027
Emu Park	6,516	6,321	9,698	-3,182	2024
Taranganba (Cedar Park)	2,107	2,044	3,251	-1,144	2024
Rosslyn Bay	1,509	1,464	2,164	-655	2024

Scenario 2 — Development of vacant land

This scenario allows for future development on vacant land (if available) to absorb excess demand for retail floorspace. By considering development on vacant land already zoned for retail and/or commercial, the total retail floorspace capacity is projected to increase to 88,870m², a total increase of 15,731m² from the currently developed GFA.

The results of the analysis are presented in Table 10 and found:

- At the Yeppoon Major Centre, James Street contains all identified vacant land and is expected to be capable of absorbing the spillover demand from all three sections of Yeppoon and Cedar Park shops through to 2036. However, the overall deficit will reach 10,863m² (including Cedar Park) by 2046.
- Emu Park has a substantial area of vacant allotments, amounting to approximately 54.5% of its currently developed GFA. This is expected to adequately accommodate the additional demand over the forecast horizon, resulting in a surplus of 372m² by 2046.
- With no vacant land at Taranganba (Cedar Park), demand will have reached capacity in 2024 in line with the base case.
- Vacant lots at Rosslyn Bay are not reflective of available capacity due to mixed use nature of land within Rosslyn Bay, so have not been considered in this scenario, but are considered in Scenario 3.

Table 10: Retail GFA demand & supply forecasts by centre - Scenario 2 (Source: AEC)

Centre	Developed GFA & Vacant Land	Currently Occupied GFA (m ²)	GFA Demand at 2046 (m ²)	Balance at 2046 (m ²)	Demand reaches capacity
Yeppoon — Central Shopping Centre	14,900	14,155	21,530	-6,630	2025
Yeppoon — James Street	50,094	34,125	52,055	-1,961	2036
Yeppoon — Bay Plaza	9,662	8,213	10,790	-1,128	2027
Emu Park	10,070	6,321	9,698	372	-
Taranganba (Cedar Park)	2,107	2,044	3,251	-1,144	2024
Rosslyn Bay	1,509	1,464	2,164	-655	2024

Scenario 3 — Redevelopment of existing centres

This scenario allows for future redevelopment on both vacant land and sites with redevelopment potential for retail and commercial development under the current planning regulations, to assess the ability of the current planning scheme to provide for projected demand for retail floorspace.

By considering development on these sites, the total retail floorspace capacity in the centres considered is projected to increase to 107,810m², a total increase of 35,199m² from the currently developed GFA. While this exceeds the total floorspace demand expected in Livingstone, estimated at just under 100,000m², the surplus capacity that exists at Rosslyn Bay and Emu Park will not necessarily adequately service excess demand from other centres due to their specialised nature and isolated location from other centres and residents respectively.

The results of the analysis are presented in Table 11 and found:

- At the Yeppoon Major Centre, James Street also contains all identified redevelopment sites, amounting to approximately 7,387m² of estimated GFA. It is expected to be capable of absorbing the spillover demand from all three sections of Yeppoon and Cedar Park shops to 2041.
- The allowance for sites with further development potential further increases the surplus at Emu Park compared to Scenario 1, with the surplus expected to reach 4,793m² by 2046.
- Rosslyn Bay has significant redevelopment potential, amounting to an estimated 7,660m² of potential GFA. This far exceeds the current developed GFA and can easily accommodate the expected demand at the centre, resulting in a surplus of more than 7,000m² by 2046.

Overall, this analysis suggests that approximately 3,500m² of additional land is required to accommodate the expected additional demand from Yeppoon Major Centre (shortfall of 2,332m²) and Taranganba (Cedar Park – shortfall of 1,144m²) at 2046, while Emu Park and Rosslyn Bay are capable of accommodating demand within the existing zoned centre land.

Table 11: Retail GFA demand & supply forecasts by centre - Scenario 3 (Source: AEC)

Centre	Developed GFA & Vacant Land	Currently Occupied GFA (m ²)	GFA Demand at 2046 (m ²)	Balance at 2046 (m ²)	Demand reaches capacity
Yeppoon — Central Shopping Centre	14,900	14,155	21,530	-6,630	2025
Yeppoon — James Street	57,481	34,125	52,055	5,426	2041
Yeppoon — Bay Plaza	9,662	8,213	10,790	-1,128	2027
Emu Park	14,491	6,321	9,698	4,793	-
Taranganba (Cedar Park)	2,107	2,044	3,251	-1,144	2024
Rosslyn Bay	9,169	1,464	2,164	7,005	-

Existing Scheme Centres Hierarchy — Ultimate Scenario

The planning scheme Strategic Framework includes centres investigation areas and associated underlying planning assumptions for estimated Gross Floor Area as summarised in Table 12.

Table 12: Centre Investigation Areas – Indicative Capacity

Investigation Area	Centre Type	Estimated Ultimate GFA
Emu Park (IA3)	District centre	15,000m ²
Hidden Valley (IA4)	Neighbourhood centre	2,500m ²
Pacific Heights (IA5)	Neighbourhood centre	2,500m ²
Taroomball (IA6)	Neighbourhood centre	2,500m ²
Zilzie (IA12)	Neighbourhood centre	2,500m ²
Zilzie (IA13)	Neighbourhood centre	2,500m ²
Total potential GFA		27,500m²

It is noted that two additional neighbourhood centres would satisfy the estimated shortfall at 2046. If all Centre Investigation Areas were to be developed, there would be a surplus of centres land of approximately 24,000m² which is similar in size to the combined GFA of Yeppoon Central Shopping Centre and Bay Plaza Shopping Centres. This indicates that there is not sufficient demand at 2046 to make the Emu Park District Centre IA and three of the neighbourhood centre IAs viable.

5.0 Preferred Centres Hierarchy 2046

5.1 Centres Hierarchy Recommendations

In defining a Centres Hierarchy, we recommend closely aligning the land supply with demand, alongside other important elements including:

- Establishing an efficient and effective settlement pattern
- Providing for the right mix of services in the right location at the right time
- Protecting the economic viability of centres without preventing competition
- Aligning development sequencing with infrastructure planning
- Fostering social cohesion and place identity.

Based on the analysis presented in Section 3.0 and Section 4.0, and in consideration of the elements above, it is recommended that the preferred Centres Hierarchy at 2046 is based on the following:

- **Clear roles and functions within a network of centres** — Maintain the primacy of Yeppoon Major Centre, while allowing Emu Park to meet its potential as a Local Centre. Any additional centres must have a complementary role and function to these centres. As such, it is recommended that no higher order centres are introduced to the Centres Hierarchy for a 2046 planning horizon. Any areas identified for future centres beyond 2046 should be protected from piecemeal development that may jeopardise its future use.
- **Consolidate demand into existing centres** — In support of the role and function of each centre, excess demand should first be accommodated within existing centres where possible. This is particularly the case for Yeppoon, Emu Park and Rossllyn Bay where there is significant indicative capacity.
- **Provide for neighbourhood convenience needs** — Taranganba is the only neighbourhood centre in Livingstone and demand forecasts show an imminent shortfall in GFA compared to demand.

- **Align new centre land with growth and transport** — Significant residential development has occurred, commenced or been approved in and around Hidden Valley and Taroomball. These suburbs are strategically located between the Yeppoon Rockhampton Road and eastwards towards Lammermoor and Taranganba respectively. Additional neighbourhood centre land in these areas would provide convenience needs aligned with growth areas and key transport corridors.
- **Clarify timing for future centres** — There are several Investigation Areas (IAs) identified in the strategic framework for new centres. The demand and supply analysis presented in this study estimates that the majority of these centres are not required at 2046. This includes the District Centre IA at Emu Park, which may conflict with the existing Local Centre, as well as Local Centre IAs at Zilzie and Pacific Heights.
- **Create a monitoring program** — Analysis shows that the planning scheme has an abundance of land supply allocated to existing and planned centres. This overprovision undermines the intent of the policy and we have observed that development applications are made in a variety of ad hoc locations across the shire. As part of future planning scheme updates, monitor demand and supply for centres land and update the Centres Hierarchy.

As such, the centres are recommended for the 2046 future case are illustrated in Figure 33 and described below:

- Major Centre at Yeppoon
- Local Centre at Emu Park
- Neighbourhood Centres at Taranganba (existing), Hidden Valley (IA), and Taroomball (IA).

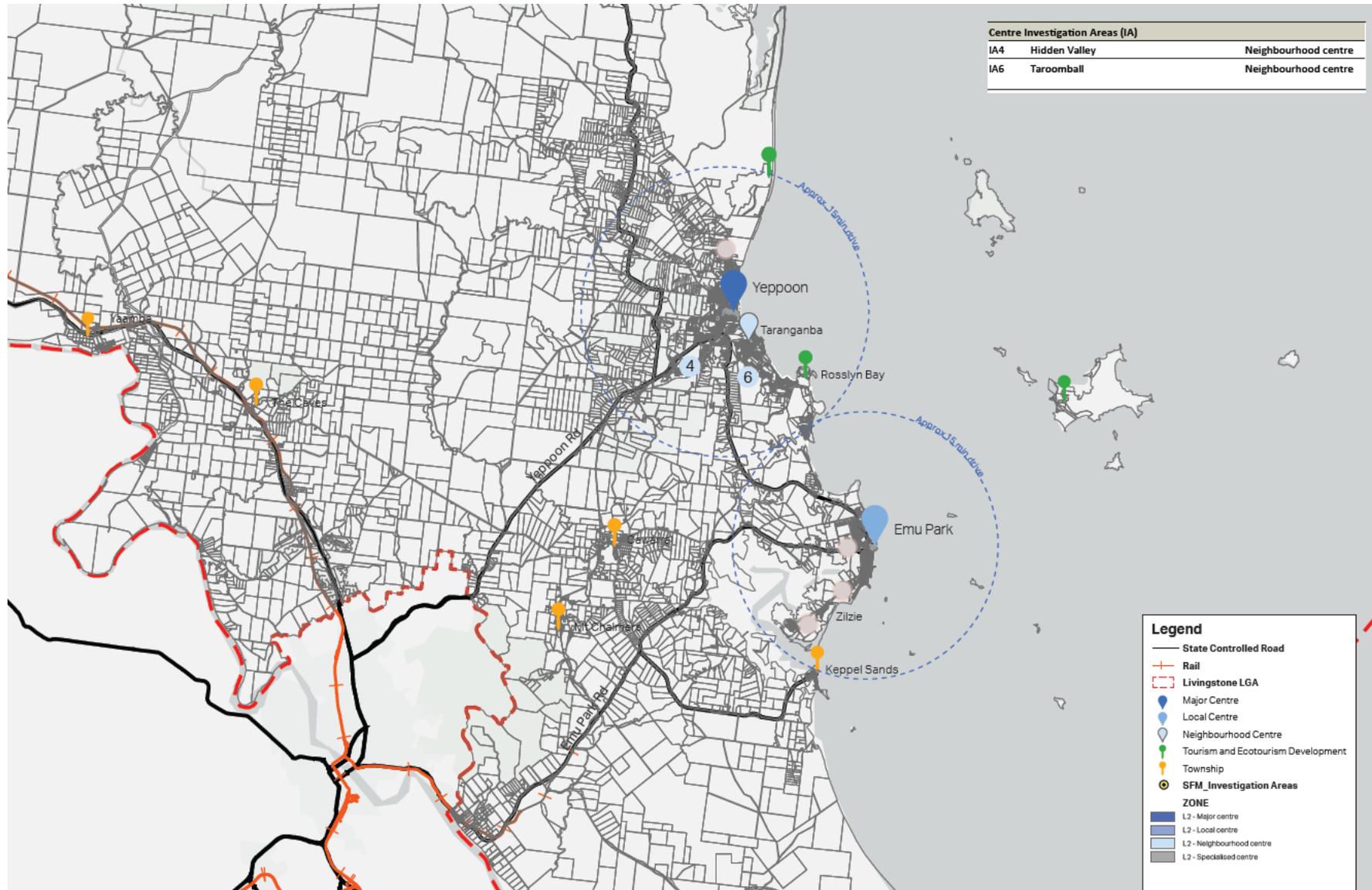


Figure 33: Recommended centres hierarchy for 2046

5.2 Planning Scheme Recommendations

The planning scheme has been reviewed to identify changes required to introduce the proposed centres hierarchy including any gaps in existing assessment benchmarks that limit the development potential of centre land. The centres hierarchy has been compared against other Queensland and Australian planning schemes to refine definitions and approaches. The recent Queensland Government [Consultation Paper](#) “Opportunities to generate further competition in the grocery sector through Queensland’s planning framework” has also been considered.

Recommended changes to the planning scheme are outlined below. Recommendations are on a ‘by exception’ basis, meaning that they are only made where a change is recommended.

Strategic Framework

- Centre Place Type definitions are generally considered appropriate, though the following recommendations are made to clarify the expected GFA or catchment of certain centres:
 - Major Centre — add that a Major Centre includes multiple full-line supermarkets and more than 40,000m² retail GFA.
 - District Centre — include GFA thresholds of 15,000-25,000m² retail GFA and more than 5,000m² commercial GFA, which speak to the economic function of the centre. Clarify that a District Centre may include one or more full line supermarkets.
 - Local Centre — include GFA thresholds of 5,000-7,000m² retail GFA and 2,000-5,000m² commercial GFA. Clarify that a Local Centre may include one supermarket.
 - Neighbourhood Centre — include GFA thresholds of 2,500m² retail and commercial GFA. Clarify that Neighbourhood Centres may include convenience grocery activities. Remove the Taroomball centre from the definition as this is not existing.
- Remove redundant Investigation Areas or clarify the timing of the IAs to be provided:
 - Hidden Valley and Taroomball Neighbourhood Centres – prior to the year 2041
 - Emu Park District Centre, both Zizlie Neighbourhood Centres, Pacific Heights Neighbourhood Centre — beyond the year 2046.
- As noted in the strategic intent Centre Place Type definition, Neighbourhood Centres are not shown on strategic framework maps. However, Neighbourhood Centre IAs are shown. It is recommended that these are removed from maps or shown consistently.
- Add a statement to the Centres specific outcomes and land use strategies to clarify that centre activities should occur only in centre places. Note that the Queensland Government is exploring new ‘tests’ for out-of-centre development that may include a ‘competition test’ rather than demonstrating need and preventing impacts to existing centres. Council should seek further guidance from the State Government in preparing out-of-centre planning amendments.
- Maintain statements about the centres at IAs only occurring once the population of the catchment area is sufficient to support a centre of that scale without compromising the viability of the other centres. Consider adding to these statements that new supermarkets may be supported where evidence is demonstrated through a ‘competition test’. Nevertheless, it is noted that any amendment should align with proposed policy reforms coming from the Queensland Government review of the planning framework relating to the grocery sector

Zoning

- Emu Park Local Centre — consider rezoning land fronting Archer Street between Hill Street and Granville Street (excluding 24 Hill Street and 15–19 Granville Street) to reflect its predominant use as remnant housing. Consider options such as Mixed-Use or Medium-Density Residential zoning to better align with current land use and growth objectives. This approach would signal to landowners, prospective purchasers, and developers that Council supports increasing the supply of housing in and around the centre zone, particularly in mixed-use settings that promote vibrant and sustainable urban environments.
- Rosslyn Bay — consider rezoning land within Rosslyn Bay Marina to waterfront and marine industry and tourist accommodation zones to be clear about the intent for use of the land. Overall, zoning and categories of assessment for land in Rosslyn Bay could be simplified to allow greater flexibility in the types and scale of uses that can occur in this area.
- Neighbourhood Centre IAs do not require rezoning to allow the market to determine the most appropriate site for a future centre. Rezoning can occur once a Neighbourhood Centre has been constructed.
- Existing zone precincts that allow for centre activities in existing buildings outside the zoned centre land allow for flexible use, support existing centres and provide opportunities for small business tenancies. These precincts can be retained but no expansion is recommended.
- Demand and supply should be monitored annually from relevant data sources and development assessment activities and considered through future planning scheme reviews before changing zoning of other land.

Tables of Assessment

- Retain Impact Assessment for Dwelling houses and lots smaller than 1,000m² in centre zones.
- Continue to support Centre Activities, Entertainment Activities, and Community Activities as Accepted Development when located within existing buildings.
- In Emu Park, allow Home-based businesses as Accepted Development when located within existing buildings to support small-scale commercial uses.
- Encourage a variety of housing types, including mixed use, shop-top housing within centres, and gentle density such as apartments, townhouses, and duplexes adjoining the Centre.

Development Provisions

- Review built form outcomes including building height, setbacks, and site cover to ensure development feasibility, in conjunction with community consultation to align built form outcomes with community expectations and future growth needs.
- Review design requirements in assessment benchmarks and invest in centres/streetscape improvement plans to attract development and support a climate responsive, high-quality urban form. This should have a particular focus on providing adequate shade through trees and awnings, on site deep planting and green building responses and tropical built form providing for outdoor living, and place-based character responses.

Car Parking

- Investigate reducing car parking requirements in centres that are intended to serve higher-density, walkable catchments and have sufficient on-street parking or the potential to facilitate on-street parking (e.g., wide road reserves or grassed landscape medians). Potential locations for consideration could include Hill and Emu Streets in Emu Park.

5.3 Non-Planning Scheme Recommendations

- Ensure urban design in centres and residential neighbourhoods facilitates walkability and other modes of active transport, through permeability and convenience, design of paths and streets, safety and comfort and user facilities.
- Investigate a reduction in infrastructure charges and development fees to incentivise new commercial development on vacant and underutilised land.
- Where feasible, integrate landscaped median parking into streetscape designs to offset reduced on-site car parking rates. Potential locations for consideration could include Pattison Street in Emu Park.
- Work with the State to update the Master Planning of Rosslyn Bay Marina to better support its role in providing land for Marine Services and tourism aligned uses.
- Communicate expected changes / increase awareness of centre outcomes within centres, including acceptable development provisions.
- Develop a program to enhance tree canopy in centres by identifying suitable planting locations and selecting appropriate species to improve shading and aesthetics.
- Create community focal points in centres that underpin social cohesion, resilience, and identity by enhancing accessibility, convenience, amenity and a sense of place
- Provide a free prelodgement service for centre activities or supporting uses within centres to encourage landowners to work with Council to facilitate appropriate development.

Appendix A

Livingstone Shire Centres Hierarchy Assessment: Background Report

LIVINGSTONE SHIRE CENTRES HIERARCHY ASSESSMENT: BACKGROUND REPORT

AECOM

DOCUMENT CONTROL

Job ID: J002987
Job Name: Livingstone Shire Industry and Centres Assessment
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Document Name: AEC Livingstone Centres Hierarchy Assessment Report Final
Last Saved: 1/4/2025 5:15 PM

Version	Date	Reviewed	Approved
Draft V0.1	04/02/2024	AM/LR	AM
Final	05/02/2024	AM/LR	AM
Final (following review)	01/04/2024	AM/LR	AM

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EXECUTIVE SUMMARY

BACKGROUND

Livingstone Shire Council (LSC) aims to evaluate the current and forecast demand for retail and commercial space within the Livingstone region. This involves assessing whether the existing retail and commercial premises, along with the maximum permissible yield under current planning regulations, can meet the forecast demand within the forecast horizon. Given that several retail and commercial centres are already experiencing low vacancy rates, and with the population in the trade catchment expected to grow steadily over the long term, this study is essential.

The insights gained from this assessment will inform LSC's future planning and development strategies for the retail sector. By leveraging these insights, LSC aims to foster a vibrant and sustainable retail environment that not only supports the anticipated growth but also adapts to the evolving needs of the Livingstone community.

PURPOSE AND APPROACH

This report provides a comprehensive analysis of the economic factors driving the future demand for retail and commercial floor space in Livingstone through to 2046. It compares these forecasts against the current and maximum allowable floor space within the region.

The report focuses on four key centres: Yeppoon Major Centre, Emu Park Local Centre, Cedar Park Neighbourhood Centre, and Rosslyn Bay Special Purpose Centre.

The report maps current and projected retail expenditure at each centre and provides floor space projections based on spending patterns and future outlooks. These projections will be compared with the existing and maximum permissible retail infrastructure supply.

The findings from this analysis will contribute to a broader report prepared by AECOM - "Livingstone Shire Centres Assessment." This report will outline the strategic actions necessary to guide LSC's future decision-making processes regarding the development and planning of retail centres within the region.

KEY FINDINGS

Demand for retail floorspace at the six designated centres is forecast to rise from an estimated 66,321 sqm in 2024 to 99,489 sqm in 2046, a 50% increase driven by population growth and increased spending capacity. The analysis indicates that existing retail infrastructure will face capacity constraints soon, with all centres expected to reach capacity by 2025, except for James Street and Bay Plaza (both part of Yeppoon Major Centre), which are anticipated to reach capacity in 2028 and 2027, respectively.

Given these projections, it is necessary to explore scenarios to meet the additional retail and commercial floor space demand within the existing development controls as defined in the Livingstone Planning Scheme 2018. Two scenarios were investigated:

- **Scenario 1 - Development on Vacant Land:** This scenario projects an increase in total retail floorspace capacity to 88,870 sqm, with Emu Park adequately accommodating additional demand due to its substantial vacant allotments. However, other centres, particularly Yeppoon Major Centre, will still face significant capacity constraints by 2046.
- **Scenario 2 - Redevelopment of Vacant and Potential Sites:** This scenario assesses the ability of the current planning scheme to provide for projected demand by considering development on both vacant land and sites with redevelopment potential. The total retail floorspace capacity is projected to increase to 107,810 sqm, exceeding the total floorspace demand expected at the six designated centres.

However, the surplus capacity is not necessarily aligned with the demand, which results in some areas experiencing shortfalls of supply, even while the aggregate supply exceeds aggregate demand. Rosslyn and Emu Park are areas where our model forecasts excess supply, but due to geographical constraints, this excess supply will not meet the excess demand experienced in other centres.

Overall, future development potential at each designated centre indicates that Rosslyn Harbour and Emu Park can accommodate the additional projected demand, with surplus capacity of appropriately zoned land available through to 2046. Even with redevelopment of all currently zoned land, Yeppoon Major Centre and Cedar Park are expected to face capacity pressures before the end of the forecast period, suggesting that additional land zoned for retail and commercial will be required. Cedar Park has already reached this limit, while Yeppoon Major Centre is forecast to reach capacity by 2041.

Table ES.1: Current & Forecast Retail Floorspace Demand and Supply

Centre	Developed GFA (sqm)	Scenario 1 - GFA (sqm)	Scenario 2 - GFA (sqm)	Currently Occupied GFA (sqm)	GFA Demand at 2046 (sqm)	Capacity Reached - Central Case (Year)	Capacity Reached - Scenario 1 (year)	Capacity Reached - Scenario 2 (year)
Cedar Park Shops	2,107	2,107	2,107	2,044	3,251	2024	2024	2024
Rosslyn Harbour	1,509	1,509	9,169	1,464	2,164	2024	2024	-
Yeppoon Central Shopping Centre	14,900	14,900	14,900	14,155	21,530	2025	2025	2025
Yeppoon James St	37,917	50,094	57,481	34,125	52,055	2028	2036	2041
Bay Plaza	9,662	9,662	9,662	8,213	10,790	2027	2027	2027
Emu Park	6,516	10,070	14,491	6,321	9,698	2024	-	-

Source: AEC.

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1. INTRODUCTION

1.1 BACKGROUND

LSC has engaged AECOM and AEC Group to prepare the Livingstone Shire Centres Hierarchy Assessment and Strategy (the Centres Assessment). This strategy provides the strategic foundation for future planning and development of the region's retail sector and activity centres.

Livingstone Shire's population is projected to grow steadily over the long term, with several new residential developments expected to be delivered in the region during the analysis period of this report. This growth is anticipated to increase demand for retail and commercial floor space. Several retail centres already experience low vacancy rates. Consequently, LSC has identified the need to evaluate this potential future demand for retail and commercial floorspace and the capacity of the identified and planned centres in the region to accommodate such demand.

Throughout this report, we have considered the aggregate of retail and commercial floor area for two reasons:

- 1 Planning regulations rarely (if ever) permit commercial development whilst precluding retail services, or vice versa
- 2 Building facilities that are capable of accommodating retail uses are often capable of conversion for commercial uses, and vice versa.

Although this is not true for all possible types of commercial and retail, the overlap in permissible development and facility application is sufficient to make separation of retail and commercial uses moot.

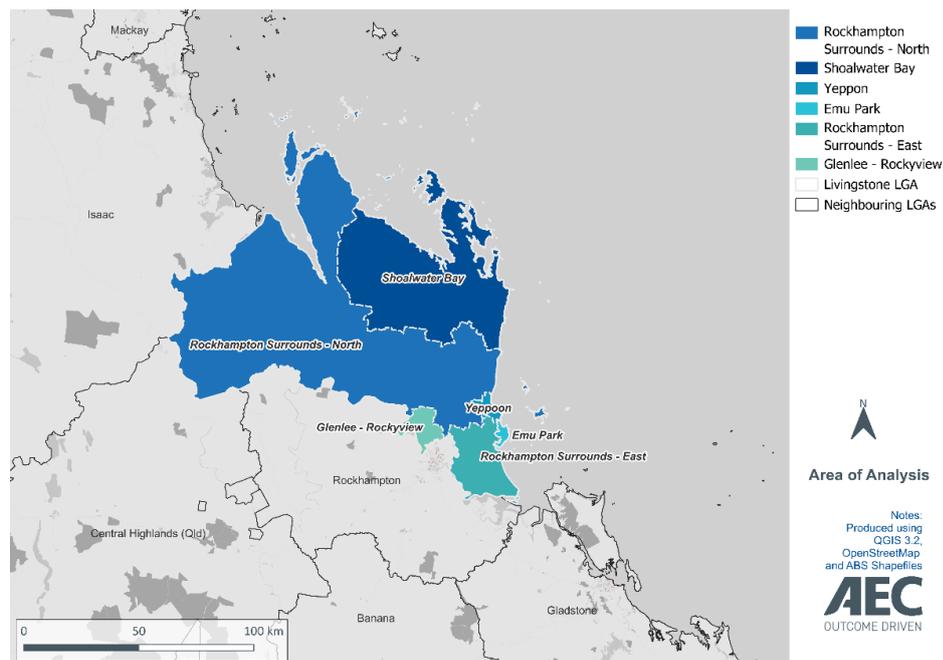
LSC aims to ensure that future planning and development decisions for the region's retail sector are evidence-based, proactive, and promote economic and regional development. By doing so, LSC seeks to create a vibrant and sustainable retail environment that meets the needs of its growing population and supports local businesses.

1.2 STUDY AREA

The Livingstone Shire Local Government Area (LGA) is 11,776 square kilometres, located in Central Queensland and is neighboured by Rockhampton LGA and Gladstone LGA. The Livingstone LGA comprises six Australian Bureau of Statistics (ABS) Statistical Area 2 zones (SA2s):

- Yeppoon
- Emu Park
- Glenlee – Rockyview
- Rockhampton Surrounds – North
- Rockhampton Surrounds – East
- Shoalwater Bay.

Figure 1.1: Livingstone Shire Local Government Area



Source: AEC.

1.3 PURPOSE & APPROACH

This report aims to provide a detailed and data-driven foundation for strategic planning by presenting the economic analysis and background research necessary to understand Livingstone Shire's future demand for retail floorspace. It compares this demand to the current developed floorspace supply in the region, along with potential increases through new development on identified vacant allotments and sites with increased development potential. This report will support and inform a report prepared by AECOM - "Centres Assessment and Strategy Report," which will outline the vision, objectives, and actions to guide LSC's future decision-making regarding retail centre development and planning in Livingstone Shire.

This report provides:

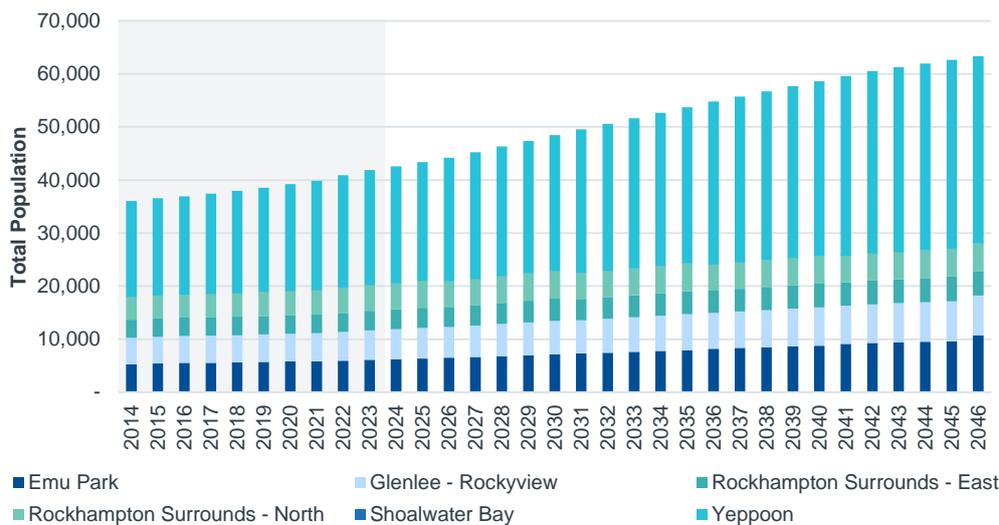
- **Section 2: Situation Analysis & Underlying Drivers:** Analyses the key underlying drivers of retail demand in Livingstone, such as population and employment growth, tourism growth, and projected spending within the region.
- **Section 3: Centres Network:** Identifies and describes the six retail centres in Livingstone, and maps the current and forecast retail expenditure at each designated centre.
- **Section 4: Future Retail Floorspace Demand Analysis:** Provides retail floorspace projections for each designated centre based on spending patterns and outlook, and compares them against current capacity. Two scenarios will be investigated to determine whether vacant allotments and new development potential at each site can absorb future retail demand.

2. SITUATION ANALYSIS AND UNDERLYING DRIVERS

2.1 POPULATION OVERVIEW AND PROJECTIONS

In 2023, the total population of the Livingstone Shire Local Government Area (LGA) (refer to as either Livingstone or the Livingstone LGA) was 41,906 people (ABS, 2024a). The majority of the population, 21,688 (or 51.8%), resided in the Yeppoon SA2. Emu Park, Glenlee - Rockyview, and Rockhampton Surrounds – North are similarly sized, accounting for 6,117, 5,571, and 4,867 people respectively. Collectively, these three SA2s represented 39.5% of the Livingstone population.

Figure 2.1: Livingstone Shire Population by SA2, 2014 to 2046



Source: ABS (2024a), QGSO (2023).

The average historical growth rate across Livingstone was 1.9% per annum from 2011 to 2023, with strong growth of 2.6% and 2.5% in 2022 and 2023. This recent population growth, much like the population growth seen across Queensland, has been largely driven by interstate migration to Queensland during the COVID-19 pandemic. The 2022 migration to Central Queensland (SA4) saw strong net increases in population from both New South Wales (15.2% of total migration) and Victoria (7.8% of total migration) (Queensland Treasury, 2023).

Based on Queensland government population projections in the medium growth scenario, Livingstone’s population is expected to continue its solid growth over the forecast period, with a projected 51% increase by 2046. This translates to nearly 21,500 additional residents, equivalent to around 8,580 new homes, assuming an average household size of 2.5 persons. The following sections outline the key growth areas of Yeppoon and Emu Park, which are estimated to account for 85.1% of the total population growth (18,265 new residents).

YEPPOON SA2

Historically, the Yeppoon population increased by 21.6% over the 10 years to 2023 (an increase of 3,858 people). Population growth in Yeppoon is expected to accelerate over the next 10 years, with population increasing in aggregate by 30.4% by 2033 (6,586 additional residents). By 2046, Yeppoon is projected to increase by a total of 13,631 people, representing a 62.9% increase on the current (2023) estimated resident population of 21,688 people. Yeppoon is projected to account for the majority of the population growth in Livingstone (63.5%) as this is the location of the majority of planned growth in urban footprint, together with providing the greatest opportunities for densification.

EMU PARK SA2

Emu Park is projected to experience a similar acceleration in population growth. Having increased by 19.9% over the 10 years to 2023 (an increase of 1,015 people), the next 10 years (2024 to 2033) are estimated to see a 24.7% increase. This equates to an increase in population of 1,508 additional residents by 2033. By 2046, Emu Park is

estimated to be home to 10,750 people, which is a projected increase of 4,633 people over the 23-year forecast period and 75.7% greater than the current population.

2.1.1 COMMUNITY RESIDENTIAL PROFILES

DWELLING TYPES

- The majority of dwellings in Livingstone (83.5%) are detached dwellings. By comparison, of all homes across Queensland, 72.1% are detached dwellings.
- Within Livingstone, detached dwellings account for 77.2% of households in Yeppoon and approximately 82.1% of homes in Emu Park. Detached dwellings account for 95.6% of homes within the other four SA2s in Livingstone.
- Attached dwellings (units, apartments, or townhouses) account for only 10.1% of homes in Emu Park, while 17.7% of homes in Yeppoon are attached dwellings. Over a quarter of all homes in Queensland (26.0%) are attached dwellings.

TENURE TYPE

- Livingstone home ownership is high relative to Queensland, with roughly two-thirds (65.9%) of all homes being owner-occupied (either with or without a mortgage) in the region compared to 58.5% of all homes across Queensland. Similarly, the rate of home ownership without a mortgage is higher in Livingstone (34.1%) than across Queensland more broadly (27.3%).
- Approximately 61.0% of residences are either owned outright or with a mortgage in Yeppoon. Similarly, 61.6% of homes in Emu Park are owner occupied. Across the other four SA2s, owner-occupied tenures account for 77.6% of all homes.
- Nearly a quarter of homes (24.5%) are rented in Yeppoon and 22.7% in Emu Park, while rented homes only account for 7.6% of homes tenures across the remaining SA2s in Livingstone.

HOUSEHOLD COMPOSITION

- Families with children (including single parent families) in Livingstone account for 34.0% of all families. Approximately 33.9% of families in Yeppoon and 27.5% of families in Emu Park are families with children.
- Couples without children account for 28.6% and 29.5% of households in Yeppoon and Emu Park, respectively.
- Non-family households in Livingstone make up 19.4% of all households. Emu Park (21.8%) and Yeppoon (21.7%) trend above the region's average proportion of households comprised as 'non-family' households.
- Livingstone trends below the Queensland average in terms of families with children (38.0% in Queensland), and above the Queensland average in terms of couples without children (25.7% in Queensland). Nearly a quarter of households in Queensland are 'non-family' (24.7%).

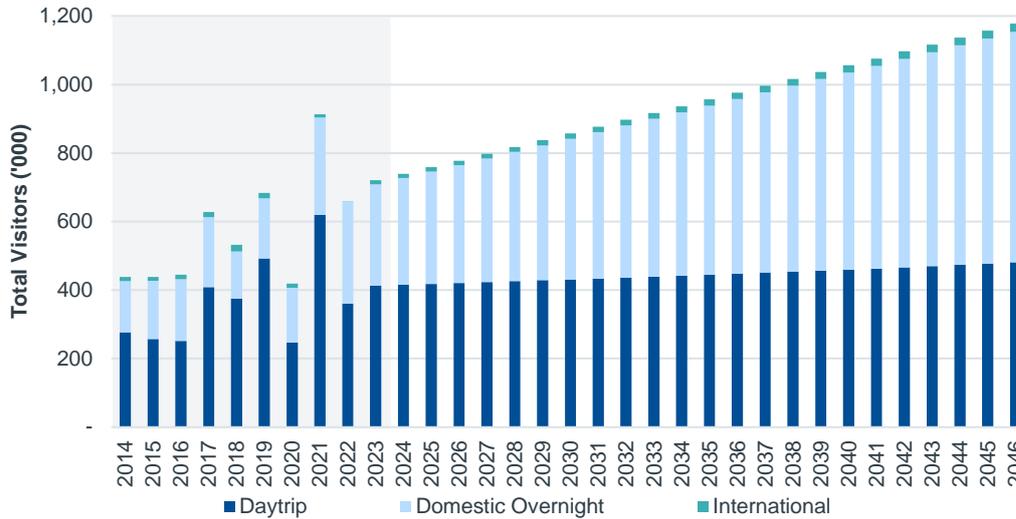
AVERAGE AGE

- The population in Livingstone has a higher proportion of residents who are 65 years or older (21.0%) when compared to Queensland (17.0%). Emu Park, in particular, has a proportionally older population than both Livingstone and Queensland with over a quarter of the population (28.2%) who are 65 years or older. This age demographic accounts for 21.0% of Yeppoon's population.
- The age groups 'under 15' and '15 to 34' in Livingstone are both smaller in size than the Queensland average. In particular, those aged 15 to 34 account for 21.0% of the population in Livingstone, compared to 26.0% of the population in Queensland. Those under 15 years of age account for a similar proportion of the population in both Livingstone (18.2%) and Queensland (18.7%).

2.2 LIVINGSTONE TOURISM FORECAST

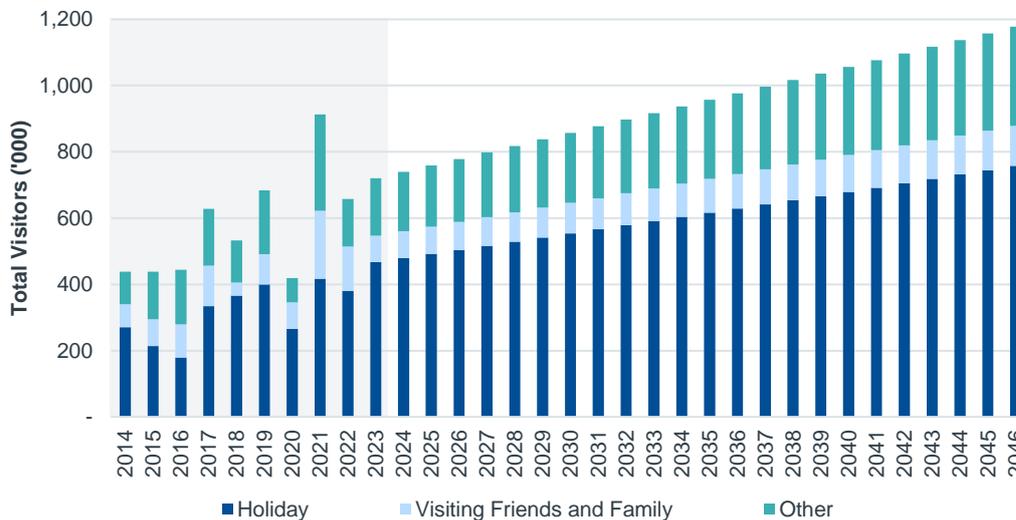
In recent years, visitation to Livingstone has been relatively inconsistent, with notable spikes in 2017, 2019, and 2021. The COVID-19 pandemic significantly impacted visitation between 2020 and 2022, causing a sharp decline due to border closures and travel restrictions. Despite this recent volatility, visitor numbers rebounded to a relatively high 721 thousand in 2023 (TRA, 2023a; 2023b; 2023c). Looking ahead, steady growth in total tourists is anticipated over the forecast period, with a projected 63.4% increase, reaching a total of 1.2 million visitors by 2046.

Figure 2.2: Livingstone Shire Visitors by Type of Visitor, 2014 to 2046



Source: TRA (2023a, 2023b, 2023c), AEC.

Figure 2.3: Livingstone Shire Visitors by Reason for Visit, 2014 to 2046



Source: TRA (2023a, 2023b, 2023c), AEC.

Daytrip visitors are expected to grow at an annual rate of 0.7% over the forecast period. Among these visitors, those visiting family and friends are projected to increase in line with Livingstone’s population growth. This is based on the rationale that a rise in residents will lead to more visitors in this category. Growth in the ‘Holiday’ and ‘Other’ visitor categories is expected to align with the softer average population growth in the neighbouring local government areas of Rockhampton and Gladstone, as these short trips are primarily anticipated to be undertaken by visitors from surrounding regions. Overall, daytrip visitors are forecasted to grow from 413 thousand in 2023 to 481 thousand by 2046.

Domestic overnight visitors are projected to experience the highest growth rate among visitor types over the forecast period, with a cumulative annual growth rate (CAGR) of 3.6%. By 2046, the number of domestic overnight visitors is expected to more than double, increasing from 296 thousand in 2023 to 673 thousand. Growth in international visitors is estimated at approximately 531 additional visitors each year, reaching 24 thousand by 2046. Both domestic overnight and international visitor growth is expected to be strongest among holiday visitors, with CAGRs of 3.9% and 4.3%, respectively. Similar to daytrip visitors, the number of domestic overnight and international visitors coming to visit family and friends is expected to increase in proportion to Livingstone’s population growth. Growth in the ‘Holiday’ and ‘Other’ visitor categories is based on historical and pre-COVID visitation patterns.

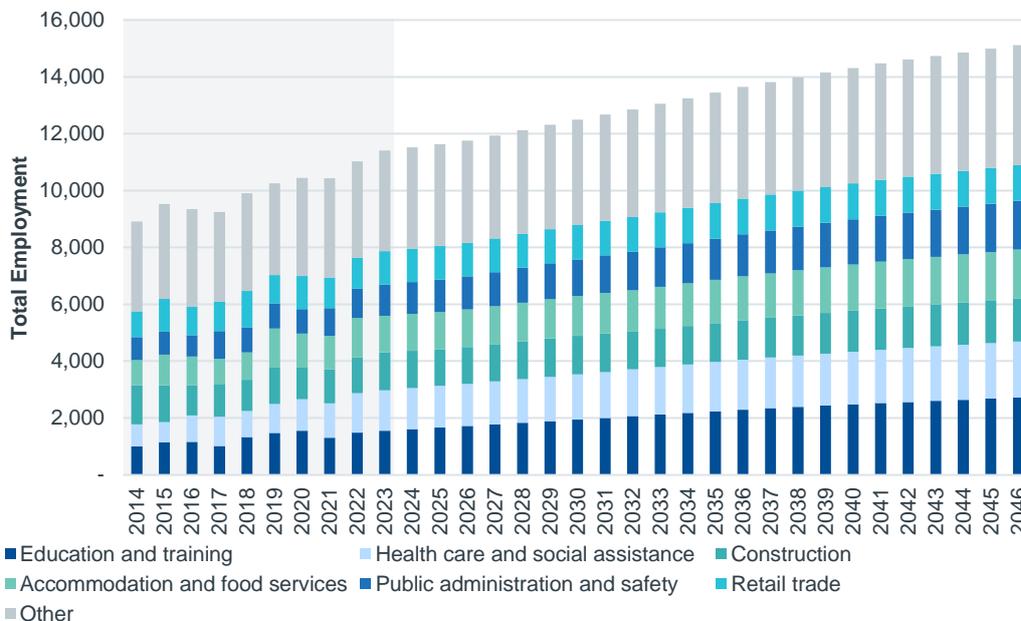
2.3 CATCHMENT AREA EMPLOYMENT ASSESSMENT

In 2023, there were 11,413 full-time equivalent (FTE) jobs across the Livingstone Shire (by place of work (POW)). The top six industries of employment were:

- Education and training (1,553 FTE)
- Health care and social assistance (1,425 FTE)
- Construction (1,324 FTE)
- Accommodation and food services (1,297 FTE)
- Retail trade (1,171 FTE)
- Public administration and safety (1,094 FTE).

Collectively, these six industries accounted for 68.9% of the total employment across the region. In the 10 years to 2023, health and social care assistance saw the largest increase in employment with a CAGR of 7.8% and increasing by 112.5% (754 FTE) over the 10 years. This growth rate was followed by education and training which increased by a CAGR of 4.7%, increasing by 576 FTE over the 10 years. Construction was the only top six industry to have a reduction between 2013 and 2023, with a marginal contraction of 0.2% (or 27 jobs).

Figure 2.4: Livingstone Shire Total Employment by POW, 2014 to 2046



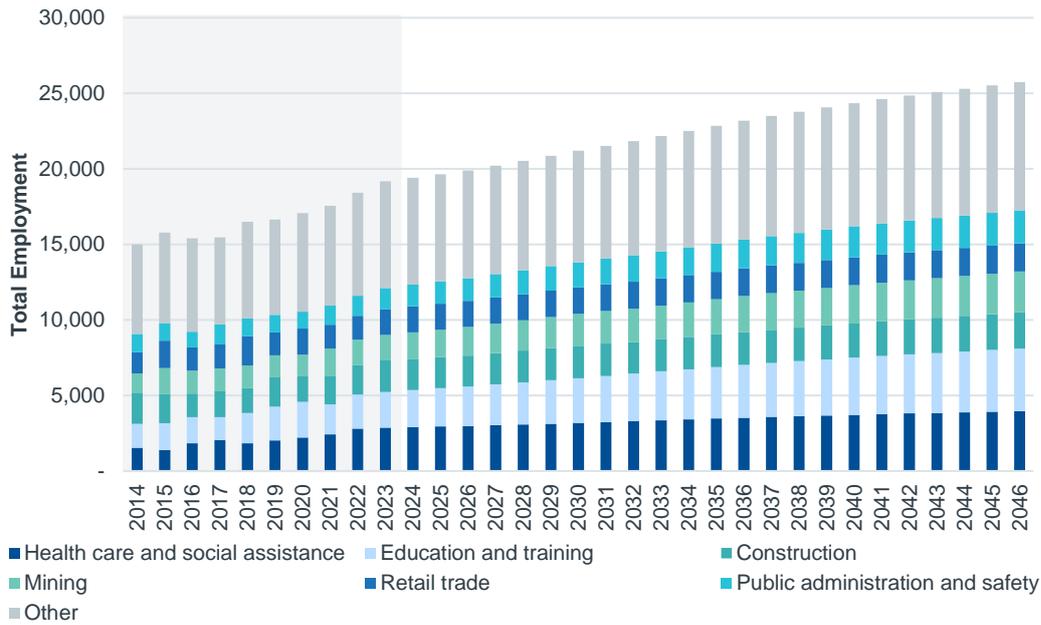
Source: ABS (2012, 2017, 2022), AEC (unpublished).

Across the SA2s, Yeppoon is estimated to be the region with the highest employment with 7,177 FTE jobs (or 62.9%) located within the Yeppoon SA2. Accommodation and food services and retail trade are the largest employers within Yeppoon and collectively account for 28.3% of all jobs in Yeppoon.

Livingstone shire is home to many who work outside the region, with residents commonly commuting to Rockhampton or working on a fly-in fly-out basis (or drive-in drive-out). Historically, employment by place of usual residence (POUR) has averaged a ratio of 1.66 to employment by POW which indicates that for every FTE position employed and living within Livingstone Shire, an additional 0.66 FTE reside in Livingstone and are employed outside the region.

The largest industries which employ residents of Livingstone are largely the same as those who work in the region. Mining is one of the largest industries for Livingstone in terms of employment by place of usual residence and has very little employment within the region itself. Manufacturing is the only industry in Livingstone which employs more people than has residents who work in the industry, indicating an influx of employment from surrounding regions.

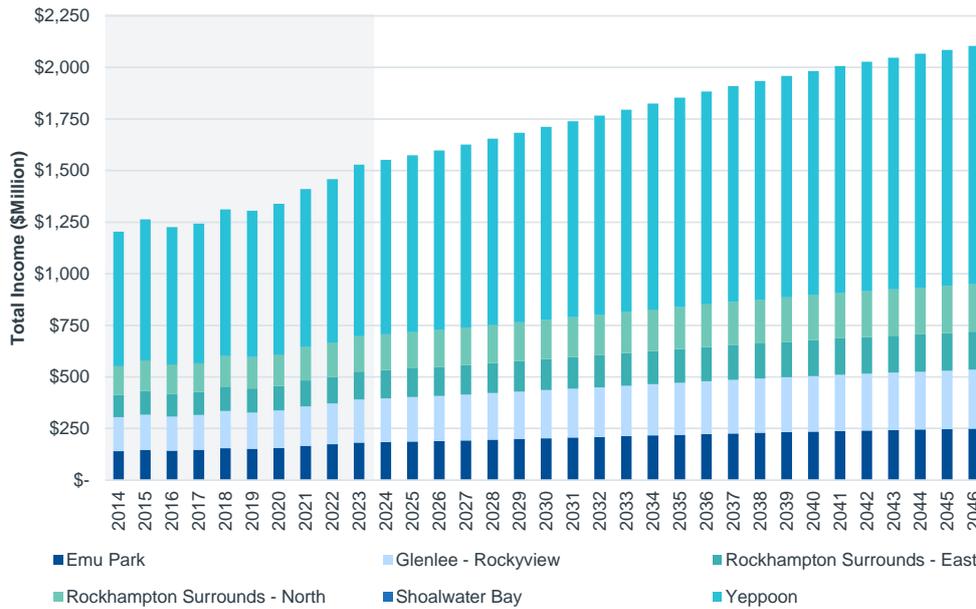
Figure 2.5: Livingstone Shire Total Employment by POUR, 2014 to 2046



Source: ABS (2012, 2017, 2022), AEC (unpublished).

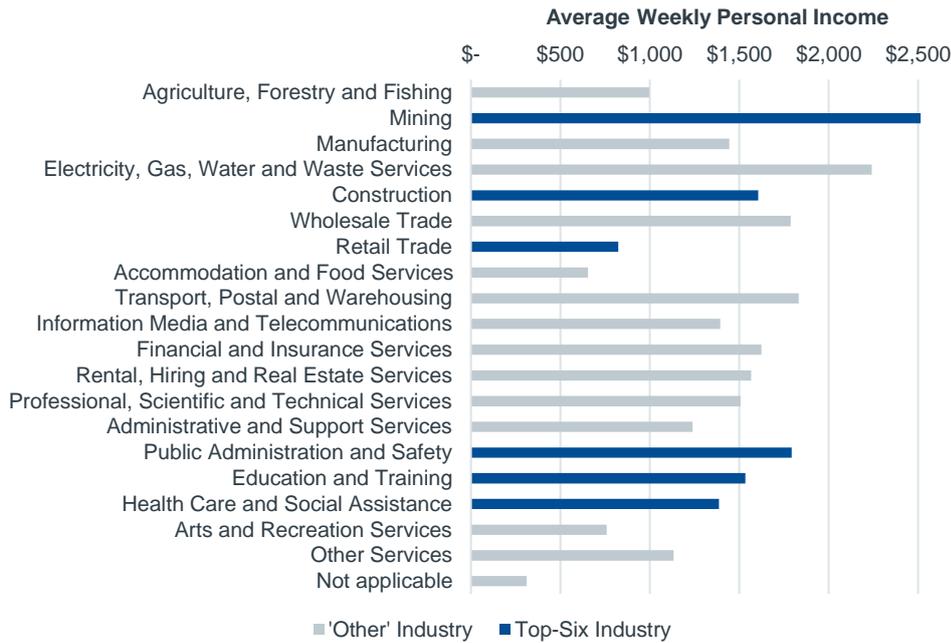
Employment projections indicate that the ratio of employed residents to those who work within the region will increase to 1.70, reaching 25,732 people employed and living in Livingstone by 2046. This represents an average annual employment growth rate (POUR) of around 1.3% over the forecast period. The sectors with the greatest growth rates from 2023 to 2046 are Education and Training (2.5% CAGR), Mining (2.1% CAGR), and Public Administration and Safety (2.0% CAGR).

Figure 2.6: Total Income of Employed Residents by SA2, 2014 to 2046. \$ (Real, 2024)



Source: ABS (2012, 2017, 2022, 2024b), AEC (unpublished).

Figure 2.7: Livingstone Shire Average Weekly Earnings by Industry of Employment, \$ (Real, 2024)



Source: ABS (2022, 2024b).

Total income of employed Livingstone residents is based on employment by POUR projections and average weekly income data, adjusted to annual terms.¹ The POUR measure is preferred for estimating the spending capacity of Livingstone residents, as the POW measure does not capture residents' significant income earned outside the catchment.

Total income of employed residents is forecast to grow around 1.4% per annum over the forecast horizon, reaching \$2.1 billion (in real 2024 terms) by 2046. Yeppoon residents are expected to remain the primary source of income, accounting for 54.9% of total income. The primary driver of income growth is anticipated to come from the mining

¹ FTE data is sourced from Employment by POUR, excluding the "Not Applicable" category.

industry, which is one of the fastest-growing industries by employment and has the highest average weekly earnings (ABS, 2022).

2.3.1 COMMUNITY EMPLOYMENT PROFILES

LABOUR FORCE PARTICIPATION

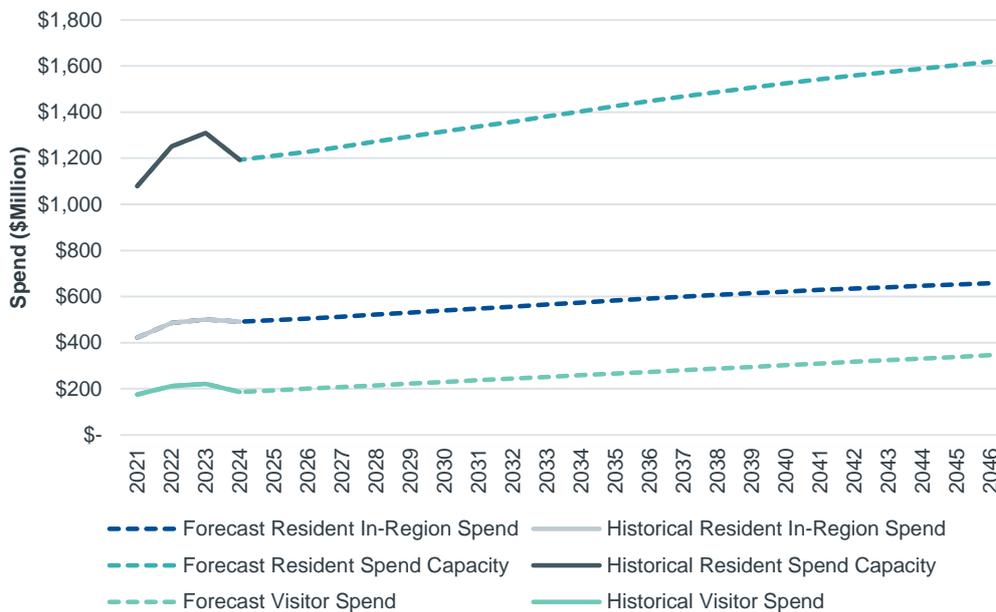
- The labour force participation rate² for Livingstone is 51.0%, which is lower than Queensland’s labour force participation rate of 53.5%.
- Within Livingstone, Emu Park’s labour force participation rate is 43.3% and Yeppoon’s labour force participation rate is 52.4%.

LABOUR FORCE STATUS

- In September 2024, 97.6% of Livingstone’s labour force were employed (2.4% of the labour force are unemployed). Emu Park and Yeppoon had the lowest rates of employment in the region, with 95.9% and 97.6% of the labour force employed, respectively.
- Yeppoon has one of the highest rates of full-time employment in the region, with 60.4% of those employed working full-time. 57.0% of Emu Park’s employed workforce are full-time employees. Across Livingstone, 60.4% of all employment is on a full-time basis.
- Livingstone has a lower unemployment rate than Queensland, and of those employed, have a marginally higher rate of full-time employment when compared to Queensland more broadly. In September 2024, the unemployment rate in Queensland was 3.8% (compared to 2.4% in Livingstone), and of those employed, 59.0% in Queensland are employed full-time.

2.4 CATCHMENT AREA EXPENDITURE ASSESSMENT

Figure 2.8: Forecast Resident Spend and Visitor Spend in Livingstone, 2021 to 2046, \$ (Real, 2024)



Source: Spendmapp (2024), AEC.

² The labour force participation rate is a measure of an economy’s workforce, and includes persons who are over 15 years of age and are looking for work (either employed or unemployed). People unemployed but not looking for work are not considered part of the labour force (such as retirees or persons unable to work).

We have sourced two independent data series that provide information on aggregate spending capacity of Livingstone residents – Spendmapp data (Spendmapp, 2024) and ABS data relating to resident income. We have generally used Spendmapp data when referring to aggregate retail spending, but have used ABS and other data and projections to calculate forecasts. The decision to use Spendmapp data to report aggregate retail spending does not impact our forecasts for future retail GFA demand, but is the more conservative data set when drawing conclusions regarding the current retail revenue for existing businesses.

The total spending capacity of Livingstone residents, as sourced from Spendmapp, is the estimated total expenditure by Livingstone residents with merchants (irrespective of region) based on bank transaction data. It is estimated that the total spending capacity of Livingstone residents surged from 2021 to 2023, before declining to \$1.2 billion in 2024. Total spending capacity is forecast, based on projections of total income of employed Livingstone residents, to return to growth in 2025, rising to \$1.6 billion by 2046 – a 35.6% increase over the forecast period.³

Expenditure by Livingstone residents is broken down into three spending categories: local spend, non-local spend, and online spending. The share of local spending has remained relatively stable in recent years, while the share of online expenditure increased from 22.3% in 2021 to 24.0% by 2024. Conversely, expenditure spent elsewhere (non-locally), with a significant portion spent in the adjacent Rockhampton region, declined from 38.6% to 34.9% over the same period. The share of online retail is expected to grow incrementally to 26.2% by 2046. We have assumed only marginal growth, due to Livingstone's online share already being significantly higher than the national average. Much of this increase will come at the expense of the share spent elsewhere, while the share of local spending will see a marginal decline, hovering to approximately 41%.

Livingstone residents' expenditure with merchants within Livingstone (local spend) is estimated to have increased from \$422 million in 2021 to \$490 million in 2024, a cumulative increase of 16.2%. Based on total spending capacity growth and the relative share of local expenditure, local spend is expected to rise strongly to \$658 million by 2046 – a 34.1% rise over this period.

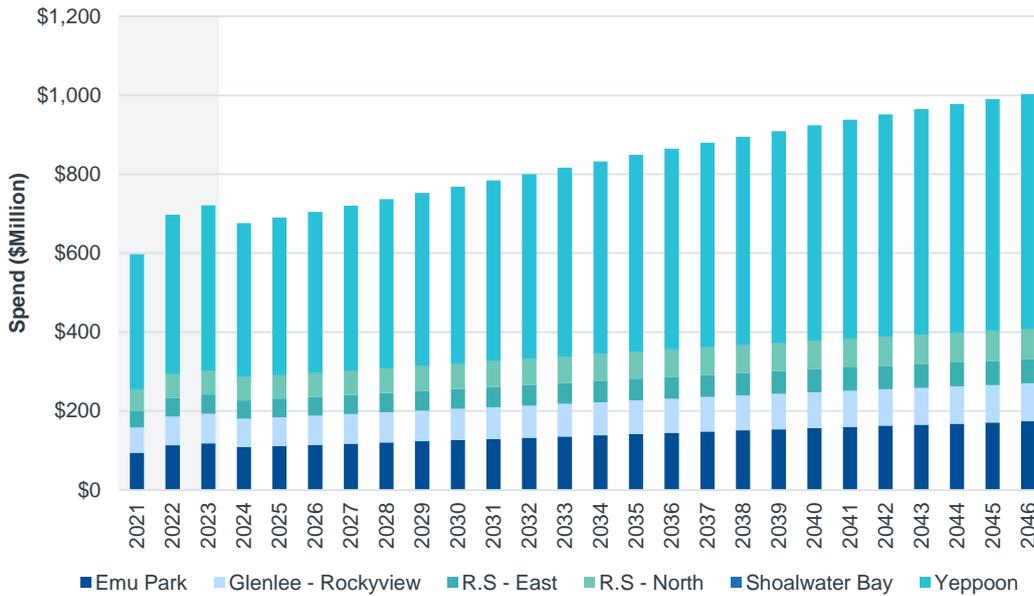
The source of the local spend in Livingstone is distributed across the six SA2 regions based on the region's share of total income of employed residents, as higher spending capacity is assumed to lead to higher expenditure. This distribution reflects the spending capacity of residents in each SA2 region, rather than the expenditure occurring within the SA2 region itself. Yeppoon residents account for the majority of expenditure, with 54.9% of total Livingstone resident expenditure, followed by Emu Park with 11.9%.

Total visitor expenditure with merchants inside Livingstone, as reported by Spendmapp, was estimated at \$186 million in 2024. This is expected to grow substantially to \$345 million by 2046, representing an 85% cumulative increase over this period. The growth projections are based on the duration of visitors' stays rather than the number of trips, as overnight and international visitors typically spend multiple days in the region, leading to higher expenditure. For the forecast period, it is assumed that the average number of days/nights spent by visitors will remain stable for each visitor type.

Visitor expenditure is also allocated across the SA2 regions, effectively representing the source of expenditure rather than its destination. The spending patterns of visitors are assumed to mirror those of residents staying in the same locations. For visitors who are family and friends, spending is distributed according to the population share of each SA2 region, assuming these visitors stay with or near family and friends. Meanwhile, holiday and other nights are assumed to be split 70% at Yeppoon and 30% at Emu Park, based on the assumption that these are (and will remain) the primary short-stay accommodation areas.

³ It is assumed that income growth for individuals classified as "Not Applicable" will align with the aggregate income growth of currently employed persons. It is important to note that the income (and therefore expenditure) of this group contributes only a small fraction of the overall retail and commercial demand. Consequently, any changes in the growth rate assumption for this group are unlikely to significantly impact the forecasted aggregate expenditure.

Figure 2.9: Source of Total Spend in Livingstone by SA2, 2021 to 2046, \$ (Real, 2024)



Source: Spendmapp (2024), AEC.

In 2024, total expenditure with merchants within Livingstone was estimated to have reached \$677 million, with 72.5% attributed to local residents. Growth, supported by both local and visitor expenditure, is forecast to just break the \$1 billion barrier by 2046, representing a 48.2% increase over this period. This growth is a key driver of retail floorspace demand and highlights the need to assess the retail supply capacity within Livingstone to accommodate such demand.

Yeppoon residents are forecast to remain the primary contributors to expenditure within the region throughout the forecast period. It is important to note that this represents the expenditure of Livingstone residents (and visitors assigned to SA2 regions based on likely location of their temporary accommodation), not the location of expenditure, which will be covered in the next section.

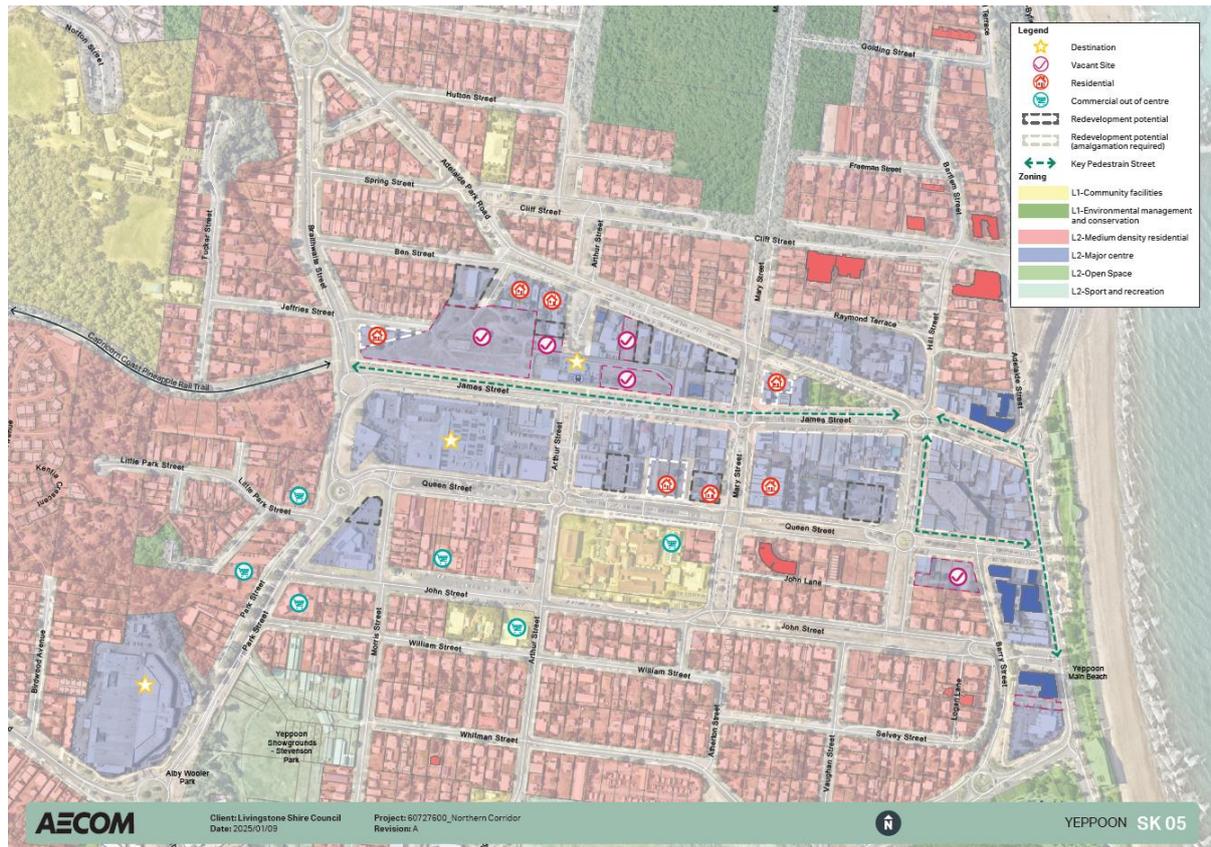
3. CENTRES NETWORK

3.1 EXISTING CENTRES OVERVIEW

Livingstone Shire features four existing key retail centres - Yeppoon Centre, which serves as the Major Centre for the region; Emu Park as a Local Centre; and two Neighbourhood Centres – Cedar Park (Taranganba) and a special purpose centre in Rosslyn Bay.

YEPPOON MAJOR CENTRE

Figure 3.1: Yeppoon Major Centre



Source: AECOM.

The Yeppoon major centre is the central focus of retail activity for the Livingstone trade area, boasting 62,479 sqm of developed retail Gross Floor Area (GFA), far exceeding the next largest centre, Emu Park, which has 6,516 sqm. This centre is divided into three primary sections: James Street, Bay Plaza, and Yeppoon Central Shopping Centre. The shopping centres alone exceed the developed GFA in other centres analysed in this report, and therefore these sections will be assessed separately, although it is arguable that functionally they operate as a single major centre. We have therefore assessed individual capacity, as well as the effects of ‘spillover demand’.

James Street: One of the main streets in Yeppoon, James Street features a walkable environment and provides a diverse range of businesses and services, including a full-line supermarket (IGA), community facilities, commercial spaces, residential areas, and accommodation. James Street is estimated to host 37,917 sqm of developed retail GFA, with a vacancy rate of 10% based on a site visit. This means 34,125 sqm of developed GFA is currently occupied by tenants, making it the largest retail area in Livingstone. James Street has significant

capacity for growth, with large vacant sites available for development, estimated at 12,177 sqm, and 7,387 sqm of sites with development potential.⁴

Bay Plaza: The Bay Plaza is a one-storey shopping centre on James Street that underwent a significant upgrade in recent years. This shopping centre offers a variety of retail and commercial services, anchored by Coles supermarket, and includes a cinema, gym, and many specialty stores. Bay Plaza has 9,662 sqm of developed GFA, and based on a site visit and desktop research, it is estimated to have a 15% vacancy rate, meaning 8,213 sqm of GFA is occupied by tenants. There are no vacant allotments and no development potential, with any additional demand assumed to spill over to James Street.

Yeppoon Central Shopping Centre: The largest shopping centre in the region, Yeppoon Central Shopping Centre is a two-storey building with most of the shops on the second floor, and the car park, Reject Shop, and Australia Post on the ground floor. This shopping centre offers a wider range of retail and commercial services than Bay Plaza and hosts several major stores, including Woolworths and Big W. Yeppoon Central Shopping Centre has 14,900 sqm of developed GFA, and based on a site visit, it is estimated to have a 5% vacancy rate, meaning 14,155 sqm of GFA is occupied by tenants. There are no vacant allotments and no development potential, with any additional demand also assumed to spill over to James Street.

EMU PARK LOCAL CENTRE

Figure 3.2: Emu Park Local Centre



Source: AECOM.

Emu Park is a small coastal centre catering to both locals and visitors. It is a walkable neighbourhood, with recent streetscape improvements on Hill and Emu Streets. The centre currently meets local convenience needs with a full-line supermarket (Drakes), specialist stores, cafes, and small-scale commercial establishments. It is the furthest

⁴ As advised by AECOM. Assumed plot ratio of 50% applied in Yeppoon, based on observed development application proposals and existing development outcomes.

designated centre from Yeppoon, roughly a 20-minute drive away, and the only centre outside the Yeppoon SA2 region.

Emu Park centre is estimated to host 6,516 sqm of developed retail GFA, with a low vacancy rate of 3% observed during a site visit. This means 6,321 sqm of developed GFA is currently occupied by tenants. The centre has the capacity to grow and realise its potential as a local centre, with an estimated 3,554 sqm of vacant allotments identified and 4,421 sqm of sites with new development potential.⁵

CEDAR PARK (TARANGANBA) NEIGHBOURHOOD CENTRE

Figure 3.3: Cedar Park (Taranganba) Neighbourhood Centre



Source: AECOM.

Cedar Park (Taranganba) is a neighbourhood centre providing convenience needs through a small variety of small-scale stores. It is the closest centre to Yeppoon and falls under the Yeppoon SA2 region. Cedar Park has 2,107 sqm of developed GFA. No vacancies were observed during a site visit, but a minimal churn rate⁶ of 3% has been assumed based on benchmark data. This results in a calculated annual mean of 2,044 sqm of developed GFA currently occupied by tenants (adjusted for churn). While the surrounding areas are slated for residential expansion, opportunities for further retail and commercial development are limited, with no vacant allotments identified. Any additional retail demand is assumed to spill over to the Yeppoon Major centre given its proximity.

⁵ As advised by AECOM. Assumed plot ratio of 65% applied in Emu Park, based on observed development application proposals and existing development outcomes.

⁶ Churn rate reflects the annualized loss of retail occupancy in a retail centre that is nominally fully occupied, which is attributable to occasional change-over of occupants.

ROSSLYN BAY SPECIAL PURPOSE CENTRE

Figure 3.4: Rosslyn Bay Special Purpose Centre



Source: AECOM.

Rosslyn Bay is a visitor-focused centre geared towards marine-related activities, with uses limited to shops or food and drink outlets, and no supermarket. Although it is part of the Yeppoon SA2 region, it is uniquely located and somewhat isolated from adjoining residential developments. It is assumed that any additional retail demand exceeding Rosslyn Bay's capacity will not spill over to the Yeppoon Major centre. Rosslyn Bay has 1,509 sqm of developed GFA, with a minimal allowance for vacancy and churn of 3% based on a site visit. This means 1,464 sqm of developed GFA is currently occupied by tenants. Rosslyn Bay has significant capacity for growth, with 7,660 sqm of sites with new development potential.⁷

3.2 ECONOMIC CAPTURE BY EXISTING CENTRES

The next step involves mapping the expenditure of Livingstone SA2 residents (including visitors assigned to the SA2 regions) onto the six designated centres, as well as the 'other/outside' category. The 'other/outside' category reflects retail expenditure that occurs outside of the designated centres, often in isolated specialised retailers such as petrol stations, licensed venues, etc.

The retail centre that captures retail expenditure demand from residents (and temporarily residing visitors) is influenced by both the inherent locational advantages of each centre and their ability to serve each SA2 region, as well as the current condition and retail experience offered by each centre. The process to determine locality spending patterns is as follows:

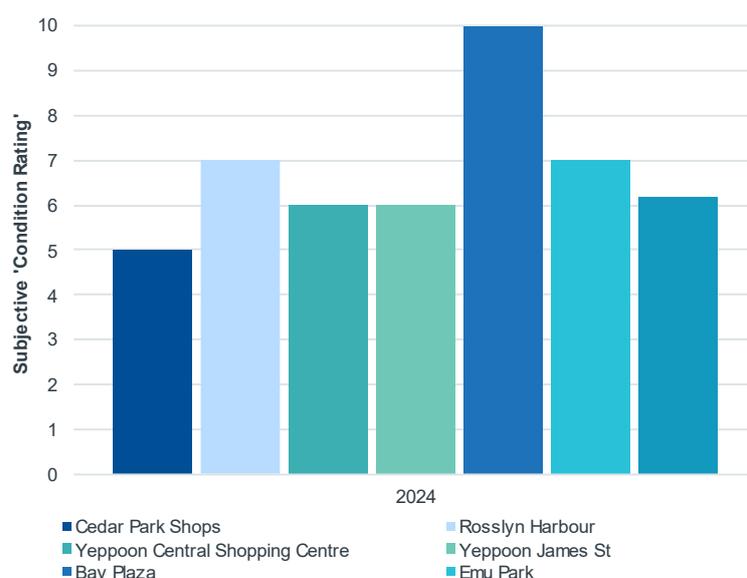
⁷ As advised by AECOM. Assumed plot ratio of 40% applied in Rosslyn Bay, based on observed development application proposals and existing development outcomes.

- **Convenience Factor:** The inherent features of each centre were analysed to ascertain the likely distribution of expenditure within Livingstone by expenditure category (sourced from Spendmapp and assumed to be the same distribution for each resident and visitor) to each designated centre. The key features considered include:
 - **Location of the Centre:** Proximity to the SA2 region plays a crucial role in determining where residents and visitors choose to spend their money. Centres that are more conveniently located relative to the population they serve tend to capture a larger share of expenditure.
 - **Proximity to Other Centres:** The distance between centres influences spending patterns, with closer centres often competing for the same customer base.
 - **Range of Retail/Commercial Offerings:** Centres with a diverse range of retail and commercial services are more likely to attract a broader customer base, thereby capturing a larger share of expenditure.
 - **Retail expenditure breakdown by category:** The breakdown between 'local convenience shopping' versus shopping in the main centre was influenced by Spendmapp data related to retail expenditure breakdown by category (food and grocery, clothing, travel, etc).
 - **Scale of Retail/Commercial Offerings:** Larger centres with more extensive facilities and services tend to draw more customers, increasing their share of the overall expenditure.
 - **Relative Competition:** The presence of competing centres can impact the distribution of expenditure.

The majority of retail spending by residents and visitors from every region is directed towards the Yeppoon major centre, which is expected given its breadth of retail offerings. Some centres offer very little to none in certain spending categories, thereby directing residents to the Yeppoon major centre. There are varying extents of this majority; for instance, Emu Park residents and visitors are estimated to spend a sizeable 29% of their retail expenditure at the Emu Park local centre, while other residents spend less than 5% of their expenditure there. This highlights the convenience, location, and proximity of the Emu Park local centre for Emu Park residents, especially for main weekly shopping for groceries and household essentials, which is typically done at a nearby centre with a supermarket. This trip is considered a chore to be done conveniently, cheaply, and efficiently. Overall, this distribution of geographic and inherent locality preference is assumed to remain fixed over the evaluation period.

- **Locality Condition Rating:** A portion of the aggregate expenditure currently received in each centre is assumed to be impacted by the relative 'attractiveness' of each centre, assessed in terms of a Locality Condition Rating. This subjective assessment of each development's 'attractiveness' was developed based on visual inspections of the centres during a site visit. This involved observing the following characteristics:
 - **Built Form and Character:** The architectural style and overall aesthetic appeal of the centre.
 - **Building Age and Condition:** Including recent upgrades and cleanliness, which can significantly influence consumer perceptions and shopping preferences.
 - **Availability of Car Parking and Other Amenities:** The convenience and accessibility of parking and other facilities such as restrooms, seating areas, and customer service

These elements formed the basis for a rating out of 10 for each centre, as shown in Figure 3.5.

Figure 3.5: Subjective Condition Rating of Each Centre, 2024

Source: AEC.

The average rating across all centres was 6.8, with Bay Plaza scoring the highest rating of 10 due to recent upgrades, while Cedar Park Shops scored a low 5. It is expected that consumers will be more attracted to and opt to shop at Bay Plaza, holding all other factors constant, than other centres.

The distribution of aggregate spend by locality was therefore adjusted to reflect this influence, and the resulting adjusted aggregate expenditure was verified by comparing the resulting data with Spendmapp data (see Section 3.3). These temporary 'drivers' are gradually removed from the model as the influence of current renovations diminishes and other centres may benefit from future improvements.

Table 3.1: Adjusted Convenience Factor & Total Spend at Centre, 2024

Centres - Adjusted Convenience Factor	Emu Park	Glenlee - Rockyview	R.S - East	R.S - North	Shoalwater Bay	Yeppoon	Total Spend (\$Million)
Cedar Park Shops	2.7%	2.0%	2.3%	1.8%	1.6%	2.4%	\$16
Rosslyn Harbour	1.7%	1.1%	1.5%	0.9%	0.8%	1.6%	\$10
Yeppoon Central Shopping Centre	13.0%	15.0%	14.5%	16.0%	18.0%	18.7%	\$114
Yeppoon James St	34.5%	36.9%	34.5%	35.4%	39.1%	48.9%	\$292
Bay Plaza	10.0%	12.1%	12.5%	12.8%	15.0%	13.3%	\$85
Emu Park	29.3%	2.5%	4.9%	2.2%	1.9%	4.7%	\$55
Other/Outside	8.9%	30.4%	29.9%	31.0%	23.7%	10.5%	\$105
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	\$677

Source: AEC.

Overall, the final distribution of expenditure by locality for 2024 is as follows:

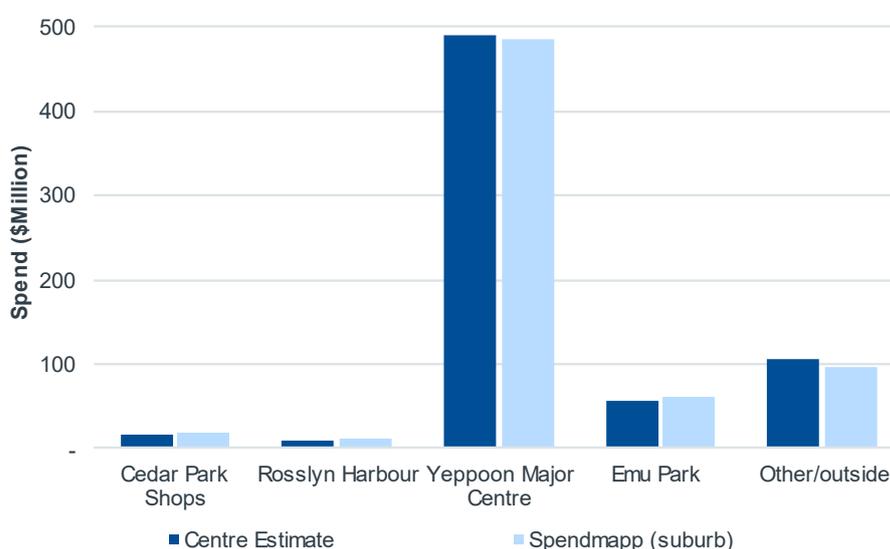
- Yeppoon Major Centre:** Captures approximately 72.6% of the region's spend, equating to \$491 million. This centre attracts the largest share of expenditure across all regions due to its extensive and diverse range of retail services, making it the key centre for activity. Of the three sections at Yeppoon, James Street dominates retail activity, capturing 43.1% of the total expenditure in Livingstone alone.
- Emu Park Local Centre:** Captures approximately 8.2% of the region's spend, equating to \$55 million. A significant portion of this expenditure comes from its own residents, given the relative distance from other centres, making it a convenient option for local shopping needs.

- **Taranganba Neighbourhood Centre:** Captures approximately 2.3% of the region's spend, equating to \$16 million. This centre has limited retail offerings and is very close to the Yeppoon Major Centre, which reduces its share of the overall expenditure.
- **Rosslyn Bay Special Centre:** Captures approximately 1.5% of the region's spend, equating to \$10 million. This centre focuses on niche activities and does not have a supermarket, which limits its share of the overall expenditure.
- **Other/Outside Areas:** Approximately 15.5% of the total spend within the LGA is assumed to be captured outside these centres. This accounts for the majority of spending on bulky items and transport, as well as some spending on professional services, as categorised by Spendmapp.

3.3 COMPARATIVE ANALYSIS OF EXPENDITURE DISTRIBUTION

The model's aggregated expenditure by centre was compared to Spendmapp's aggregate expenditure by suburb in Livingstone, as illustrated in Figure 3.6. This comparison helps validate the model's accuracy and provides insights into the distribution of retail spending across different areas.

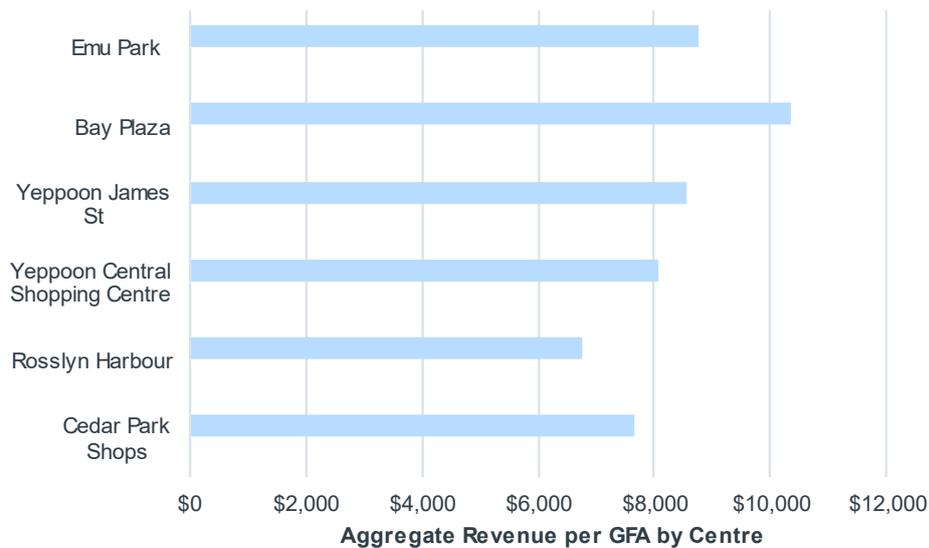
Figure 3.6: Modelled Expenditure at Each Centre vs Spendmapp Data, 2024



Source: Spendmapp (2024), AEC.

The model's output is fairly consistent with Spendmapp data, with differences largely explained by the fact that the trade catchments are not an exact match. As noted earlier, Spendmapp data reflects expenditure at the suburb level, not specifically at designated 'centres'. Therefore, spending recorded for a suburb will not represent spending exclusively at the centre within that suburb. A small portion of expenditure is assumed to occur outside the centre but within the suburb, representing leakage. The 'Other/outside' category in our modelling reflects this expenditure at retail establishments outside of the suburbs with designated centres and the leakage within the suburbs.

Figure 3.7: Aggregate Revenue Per GFA by Centre, 2024



Source: AEC.

In terms of aggregate revenue per retail floorspace, the average across the centres is indicated to be \$8,359 per GFA. Bay Plaza is estimated to show the largest revenue per GFA, which is to be expected given its prime location, diverse retail offerings, and relatively new building condition.

We have researched benchmark data (including both published data and confidentially commercial data available to AEC) to establish a reasonable benchmark gross revenue per GFA for regionally-based retail in regional Queensland. Our research indicates an expected level of \$6,600 gross revenue per sqm GFA in 2024 provides an expected level of turnover.

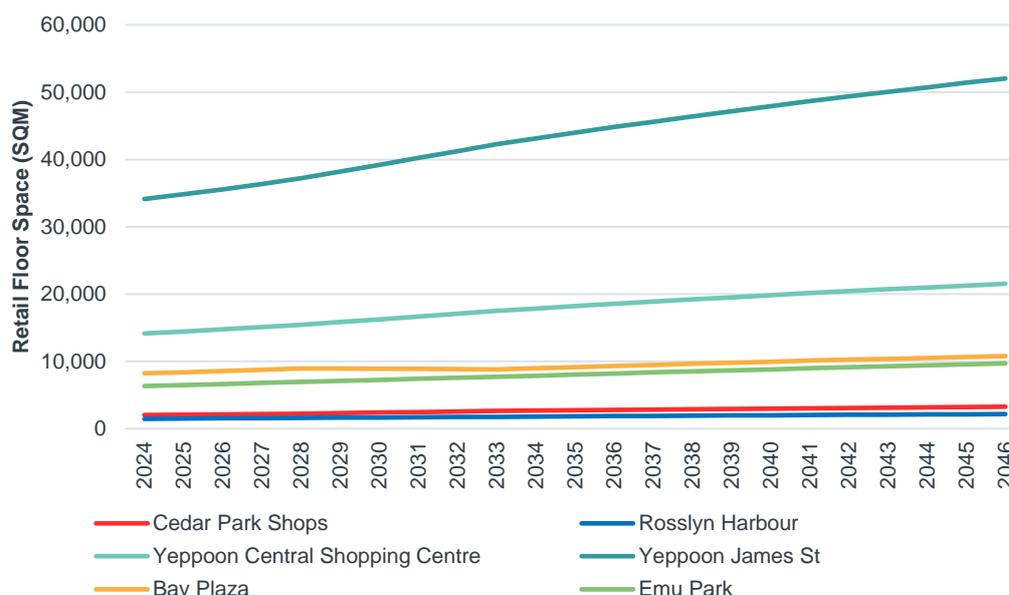
The analysis indicates that all existing centres in Livingstone LGA are performing at or above this benchmark level of revenue expected to support viability.

4. FUTURE RETAIL FLOORSPACE DEMAND ANALYSIS

4.1 FORECAST OF RETAIL FLOORSPACE DEMAND

The demand for retail floorspace at each designated centre is a critical aspect of planning and economic development. This forecast is based on current trading patterns and anticipates that demand will increase in proportion to the aggregate expenditure received at each centre. Understanding these dynamics is essential for ensuring that retail infrastructure can meet future needs and support regional growth.

Figure 4.1: Retail Floorspace Demand Forecasts by Centre, 2024 to 2046



Source: AEC.

Demand for retail floorspace at the six designated centres is projected to rise from an estimated 66,321 sqm in 2024 (currently occupied Gross Floor Area, GFA) to 99,489 sqm in 2046. This represents a significant increase of 33,168 sqm or 50% over the forecast period. The primary drivers of this demand will be the three centres in Yeppoon, followed by Emu Park, reflecting their roles as key retail hubs in the region.

To determine the demand and supply balance at each centre, we have initially examined a scenario where we assess the ability of currently existing retail and commercial premises to meet the needs of projected demand. The following assumptions have therefore been used:

- **Fixed Developed GFA:** The developed GFA at each designated centre is assumed to remain fixed over the forecast period.
- **Exclusion of Expansion:** The potential for expanding retail floorspace through vacant allotments or utilising development potential is excluded from this analysis. This aspect will be investigated in the following section.
- **Vacancy Rate:** A 3% vacancy rate is assumed to be the average churn rate, representing the rate at which floorspace capacity is effectively full. This allows for a small buffer of available space to accommodate normal business turnover.
- **Spillover Effect:** Once a given centre reaches maximum occupancy (3% churn), it is assumed that customers will begin to prefer the next nearest centre that is equal or higher on the centre hierarchy. It is important to note that spending at Emu Park, Rosslyn, and 'Other/Outside' have not been assumed to "spill over" to the Yeppoon major centre.
- **Other/Outside Retail Floorspace Supply:** The supply of retail floorspace outside the designated centres is assumed to grow in line with its own demand, focusing the analysis on the designated centres.

- **Potential of major investment projects not yet committed:** We have modelled future tourism visitation based on continuation of established trend growth. We have not included major changes in visitation, employment or expenditure capacity that may occur in the event of major investment in tourism facilities, such as a major redevelopment of Great Keppel Island. Forecasts may require review in the event that any such projects are committed.

Table 4.1: Retail Floorspace Demand & Supply Forecasts by Centre

Centre	Developed GFA (sqm)	Currently Occupied GFA (sqm)	GFA Demand at 2046 (sqm)	Balance at 2046 (sqm)	Demand Reaches Capacity (Year)
Cedar Park Shops	2,107	2,044	3,251	-1,144	2024
Roslyn Harbour	1,509	1,464	2,164	-655	2024
Yeppoon Central Shopping Centre	14,900	14,155	21,530	-6,630	2025
Yeppoon James St	37,917	34,125	52,055	-14,138	2028
Bay Plaza	9,662	8,213	10,790	-1,128	2027
Emu Park	6,516	6,321	9,698	-3,182	2024

Source: AEC.

The results of this analysis are shown in Table 4.1, which includes the year at which retail floorspace demand reaches capacity and the demand/supply balance at the end of the forecast period:

- **Capacity Constraints:** All centres are expected to reach capacity by 2025, with the exception of James Street and Bay Plaza. These centres are anticipated to reach capacity in 2028 and 2027, respectively, as they have vacant developed GFA available to absorb additional demand.
- **GFA Deficit:** By 2046, all centres are forecast to experience a deficit in available (existing) built form capable of meeting demand. This indicates that demand for retail floorspace will incentivise development of additional retail / commercial facilities in all centres during the forecast horizon, provided suitable appropriately zoned land exists within the planning scheme.

Given these projections, it is evident that there will be a need to explore several scenarios to investigate the capacity to meet demand for additional retail and commercial floor space within the existing development controls in the Livingstone Planning Scheme 2018. This will ensure that the retail infrastructure can be developed to support the anticipated growth and continue to meet the needs of the Livingstone community.

4.2 SCENARIOS

To address the increasing retail demand pressure, two scenarios were investigated to effectively increase the retail floorspace capacity. This involved considering development on identified vacant allotments and on sites with where potential exists under the current planning scheme for retail and/or commercial redevelopment. Both scenarios assume that the new development potential on James Street will absorb the spillover demand from the two shopping centres in Yeppoon and Cedar Parks, which have already maximised permissible developed area under current planning regulations.

SCENARIO 1: INCREASE RETAIL FLOORSPACE CAPACITY VIA VACANT ALLOTMENTS

This scenario allows for future development on vacant land (if available) to absorb excess demand for retail floorspace. By considering development on vacant land already zoned for retail and/or commercial, the total retail floorspace capacity is projected to increase to 88,870 sqm, a total increase of 15,731 sqm from the currently developed GFA.

Table 4.2: Retail Floorspace Demand & Supply Forecasts by Centre, Scenario 1

Centre	Developed GFA & Vacant Land (sqm)	Currently Occupied GFA (sqm)	GFA Demand at 2046 (sqm)	Balance at 2046 (sqm)	Demand Reaches Capacity (Year)
Cedar Park Shops	2,107	2,044	3,251	-1,144	2024
Rosslyn Harbour	1,509	1,464	2,164	-655	2024
Yeppoon Central Shopping Centre	14,900	14,155	21,530	-6,630	2025
Yeppoon James St	50,094	34,125	52,055	-1,961	2036
Bay Plaza	9,662	8,213	10,790	-1,128	2027
Emu Park	10,070	6,321	9,698	372	-

Source: AEC.

This scenario reveals the following insights:

- With no vacant allotments identified at Cedar Park and Rosslyn Harbour, demand will reach capacity in 2024, similar to the base case.
- Emu Park has a substantial area of vacant allotments, amounting to approximately 54.5% of its currently developed GFA. This is expected to adequately accommodate the additional demand over the forecast horizon, resulting in a surplus of 372 sqm by 2046.
- At the Yeppoon major centre, James Street contains all of the vacant allotments and is expected to be capable of absorbing the spillover demand from all three sections of Yeppoon and Cedar Park shops through to 2036. However, the overall deficit will reach 10,863 sqm (including Cedar Parks) by 2046.
- Retail floorspace capacity constraints will emerge across all centres, except for the Emu Park local centre, over the forecast horizon.

SCENARIO 2: INCREASE RETAIL FLOORSPACE CAPACITY VIA REDEVELOPMENT OF SITES WITH DEVELOPMENT POTENTIAL

This scenario allows for future redevelopment on both vacant land and sites with redevelopment potential for retail and commercial development under the current planning regulations, to assess the ability of the current planning scheme and zonings to provide for projected demand for retail floorspace. By considering development on these sites, the total retail floorspace capacity is projected to increase to 107,810 sqm, a total increase of 35,199 sqm from the currently developed GFA. While this exceeds the total floorspace demand expected in Livingstone, estimated at just under 100,000 sqm, the surplus capacity that exists will not necessarily adequately service excess demand in Rosslyn and Emu Park, which may be located too far to offer a suitable substitute location.

Table 4.3: Retail Floorspace Demand & Supply Forecasts by Centre, Scenario 2

Centre	Developed GFA & Total Development Potential (sqm)	Currently Occupied GFA (sqm)	GFA Demand at 2046 (sqm)	Balance at 2046 (sqm)	Demand Reaches Capacity (Year)
Cedar Park Shops	2,107	2,044	3,251	-1,144	2024
Rosslyn Harbour	9,169	1,464	2,164	7,005	-
Yeppoon Central Shopping Centre	14,900	14,155	21,530	-6,630	2025
Yeppoon James St	57,481	34,125	52,055	5,426	2041
Bay Plaza	9,662	8,213	10,790	-1,128	2027
Emu Park	14,491	6,321	9,698	4,793	-

Source: AEC.

This scenario reveals the following insights:

- With no future new development potential identified at Cedar Park, demand will reach capacity in 2024.
- Rosslyn Harbour has significant new site development potential, amounting to 7,660 sqm. This far exceeds the current developed GFA and can easily accommodate the expected demand at the centre, resulting in a surplus of 7,005 sqm by 2046.
- The allowance for sites with further development potential further increases the surplus at Emu Park compared to Scenario 1, with the surplus expected to reach 4,793 sqm by 2046.
- At the Yeppoon major centre, James Street also contains all the sites with new development potential, amounting to approximately 7,387 sqm. It is expected to absorb the spillover demand from all three sections of Yeppoon and Cedar Park shops by 2042.

Overall, considering future development potential at each designated centre indicates that Rosslyn Harbour and Emu Park are able to accommodate the additional projected demand, with a sizeable surplus capacity of already appropriately zoned land remaining available through to 2046. Even when redevelopment of all currently zoned land under the planning scheme is considered, demand at the Yeppoon major centre and Cedar Parks is expected to face capacity pressures before the end of the forecast period, suggesting that additional land zoned for retail and commercial will be required to accommodate the expected additional demand. Whilst Cedar park has already reached this limit, Yeppoon major centre is forecast to reach the limit of existing zoned land by 2041.

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APPENDIX A TECHNICAL ASSUMPTIONS

The AEC Livingstone Shire Centres Hierarchy Assessment Report has been prepared on the basis of a number of technical assumptions, which are summarised in this Appendix.

SOURCE OF SPENDING

- Historical Local and Visitor Expenditure at Livingstone LGA
 - Based on Spendmapp data, historical expenditure figures have been adjusted to 2024 prices using the Australian Consumer Price Index (CPI).
 - For 2024, only data from January to May is available. The average monthly expenditure for these months has been used to estimate spending for the remainder of the year, and has been compared to independent ABS data for annual spending capacity at the SA2 statistical area level.
- Spendmapp Data Representation
 - Spendmapp data reflects expenditure at the suburb level, not specifically at designated 'centres'.
 - Therefore, spending recorded for a suburb will not represent spending at the centre within that suburb. We have estimated the portion of expenditure assumed to occur outside the centre but within the suburb, representing leakage.
 - The 'Other/outside' category in our modelling reflects this expenditure at retail establishments outside of the suburbs with a designated centre(s) and the leakage within the suburbs.
 - Monthly data is only provided by Spendmapp for the top three suburbs in Livingstone in any given month. Reliable spending data is available for Yeppoon and Emu Park, as these suburbs consistently rank in the top two for expenditure. However, data for Taranganba and Rosslyn is partial, with these suburbs alternating in the third position. Consequently, Spendmapp data for these centres may understate actual expenditure. The difference between actual expenditure and the 2024 'nowcast' at the designated centre is assumed to reflect spillover to other retail establishments within the suburb.

LOCAL SPEND IN LIVINGSTONE

- Forecasting Total Spend Capacity
 - The total spend capacity of Livingstone residents, sourced from Spendmapp, is forecast based on income growth projections for Livingstone LGA residents using a range of ABS data for forecasting purposes.
 - Under the ABS's "Industry of Employment" classification, the "Not Applicable" category includes individuals who are:
 - Unemployed
 - Not in the labour force (including pensioners and self-funded retirees)
 - Under 15 years of age

It is assumed that income growth for "Not Applicable" individuals will match the aggregate income growth of currently employed persons.

Note that the income (and therefore expenditure) of this group contributes only a small fraction of the overall retail and commercial demand, and therefore a change in the growth rate assumption here is unlikely to impact the forecast aggregate expenditure.

- Local Expenditure Distribution

- Local expenditure by Livingstone residents is distributed across the six SA2 regions based on the total income share of residents. This is derived from the FTE by industry and SA2 region, multiplied by the average weekly income for the industry, adjusted to annual terms.

VISITOR SPEND IN LIVINGSTONE

- Visitor Expenditure Forecasts are based on the projected total visitor nights in the region, which are forecast to remain constant for each respective visitor type:
 - Total Visitor Trips and Nights
 - We have adopted TRA estimate of the aggregate number of nights stay, rather than the number of trips, as this is a more accurate forecast for the expenditure share by overnight and international visitors, as many of these visitors spend multiple days in Livingstone.
 - Day Trip Forecasts
 - Family & Friends: We have indexed growth in this category of visitors to Livingstone resident population growth projections. The rationale is that an increase in residents will lead to more visitors from this category.
 - Holiday and Other: We have forecast growth in this component of visitor spend based on central Queensland population projections. These short trips are assumed to be primarily undertaken by visitors from surrounding regions of Livingstone.
 - Overnight and International Trip Forecasts
 - Family & Friends: Have also been indexed to Livingstone population growth projections, similar to day trips.
 - Holiday and Other: Based on historical activity data.
- Distribution of Visitor Spend
 - Visitor spend and its forecasts are distributed by SA2 region. Visitors' spending patterns with respect to geographic distribution are assumed to exhibit similar patterns to those that would be expected for a resident staying in the same location. Expenditure forecasts are informed by separate research of visitor spend per day as noted above.
 - Family and Friends Nights: Distributed according to the population share of each SA2 region, assuming these visitors stay with or near family and friends.
 - Holiday and Other Nights: Split assumed to be 70% at Yeppoon and 30% at Emu Park, based on the assumption that these are (and will remain) the primary short-stay accommodation areas.

MAP SPENDING TO DESIGNATED CENTRES

- We have assumed that the distribution of expenditure between alternative 'Centres' is influenced by both the inherent locational (and other) advantages of each Centre with respect to their ability to serve each SA2 region, as well as the current condition and retail experience offered by each Centre.
- Distribution of Expenditure by Convenience Factor
 - The expenditure of SA2 residents (including visitors assumed to be residing in the SA2 regions) is distributed to the six designated centres and the 'other/outside' category. This distribution considers the inherent features of each centre, such as location, proximity, range of retail offerings, relative competition from other centres, and other factors.
 - In terms of aggregate expenditure (used to check average revenue per m2 GFA for retail) we have assumed that the Spendmapp data is comprehensive, rather than using the ABS data. This creates a

conservative assumption of current retail revenue per m2 GFA, but does not impact forecast growth rates for retail GFA demand, which has been based on ABS population and industry growth forecasts.

- Each SA2 resident's spend in each category (Spendmapp, 2024) has been allocated by AEC across the six designated centres and the 'other' category based on these features. This distribution (of geographic and inherent locality preference) is assumed to remain fixed over the evaluation period.
 - Spendmapp data provides expenditure by category only for the top five categories each month. Therefore, annual figures may not capture the full expenditure in each category due to changing rankings throughout the year. We have averaged the available monthly data. Categories that do not consistently rank in the top five throughout the year are grouped under 'other,' representing approximately 25% of total expenditure.
- Subjective Locality Condition Ratings
 - Locality 'current condition' ratings were developed based on visual inspections during our site visit, considering factors such as new vs. run-down conditions, suitability to current needs vs. outdated designs, cleanliness, occupancy, and availability of parking.
 - The locality spending patterns were first determined using the inherent Convenience Factor noted above.
 - We then assumed that a portion of the aggregate expenditure currently received in each Centre has been impacted by the relative 'attractiveness' of each Centre, assessed in terms of this Locality Condition Rating. The distribution of aggregate spend by locality was therefore adjusted to reflect this influence.
 - The adjustment due to the current locality condition rating has been gradually reduced (over a five year period) to 0% (no impact). This reflects the expectation that the attractiveness of current renovations will diminish over time, and other centres may benefit from future renovations and improvements. As such, for longer term forecasting we have adjusted the distribution to be influenced by the underlying inherent locational advantages, rather than temporary current facility conditions.

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