

Commercial & Retail Land Needs Review - Component 1

Final Report

May 2013



ECONOMIC ASSOCIATES

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Prepared for:

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1 INTRODUCTION

1.1 Project Background

1.1.1 Emerging Commercial and Retail Sector Trends

Subsequent to the preparation of the *Toowoomba Regional Planning Project: Activity Centres Study* and the *Toowoomba City Centre Master Plan* in 2009 there has been a number of important changes in the Toowoomba region's economic context, broader economic and activity centre trends and regional economic data availability.

The realisation of major resource sector investment and consequent take-up of land within the Charlton Wellcamp Enterprise Area has the potential to yield significant upstream and downstream supply chain effects that would typically manifest in white collar office based employment (e.g. professional & vocational training, scientific & technical consulting services, professional services, etc).

Similarly, the prospect of the development of a regional scale airport capable of accommodating jet aircraft would enhance the attractiveness of Toowoomba as a business and residential location to service the Surat Basin, and potentially the southern Galilee Basin.

In a retail context, there are a number of trends becoming increasingly apparent within Australia. A number of major rollout of new retail formats is about to commence. Council would be well aware of the existing major rollouts of Aldi and Masters, but other store roll-outs are about to commence for which Toowoomba would represent an attractive locational opportunity. A prime example is Costco, which is actively seeking sites in locations with service catchments of up to 200,000 persons. On a smaller scale, the retail sector is seeing the rollout of 'fast fashion' chains (e.g. Zara, H&M, Topshop, Forever 21, etc). The 'fast fashion' rollouts have implications for major centre managers, which would no doubt be front-of-mind for QIC in their redevelopment of Grand Central and Gardentown.

We are also aware that a number of centre developments have been approved, which may have implications for the centres hierarchy (e.g. approval of the Northpoint Shopping Centre in Harlaxton and the proposed Aldi on neighbouring land).

Subsequent to 2009 there have been a number of notable data releases; chief among these would be the 2011 Census data and the 2009-10 Household Expenditure Survey (HES). The combined significance of these two key data releases is that they form the basis for all retail expenditure analysis and have a significant influence on employment modelling.

1.1.2 A Large Floor Plate Office Strategy for Toowoomba

There is growing interest in Toowoomba as a regional head office location. To a large extent this has been driven by major resource sector investment, but Toowoomba's traditional strengths in agriculture, education and as a major regional service hub have also contributed. We understand that the Toowoomba branch of the Urban Development Institute of Australia (UDIA) has also raised this issue with Council.

The challenge facing Council is that it must facilitate sustainable economic and physical development for the CBD by responding flexibly to changing investor requirements and

emerging trends. Cities thrive with competitive and connected small businesses encouraging investment and employment. The greater the range of these ‘engines’ of growth, the healthier any community. Expanding the opportunity for different forms of office provision is part of improving Toowoomba’s economic development.

Major office development within the Toowoomba City Centre has the potential to reinforce the role and function of Toowoomba as a major regional services hub. However, Toowoomba is likely to be competing with a number of other regional centres to host head or branch office functions. There are a range of factors that may need to be addressed to consolidate Toowoomba’s competitive position; these include inter-regional accessibility, amenity, access to professional and vocational training, access to cultural and recreational opportunities and more.

Toowoomba’s proximity to Brisbane and Ipswich presents both opportunities and challenges, with the balance between these being integral to any assessment of large floor plate office opportunities.

By definition large floor plate offices have large footprints and if developed poorly can have the same unfortunate urban design outcomes of some ‘big box’ retail developments.

1.2 Purpose of Study

The purpose of the Commercial & Retail Land Needs Review is to:

- Inform strategic reviews and/or potential amendments of the Toowoomba Regional Planning Scheme (TRPS) and/or the Toowoomba City Centre Master Plan (TCCMP);
- Inform future land supply monitoring programs;
- Inform major development assessment activities in the region; and
- To provide leverage and marketing opportunities by Toowoomba Regional Council and/or the development community for attracting investment and development in the region.

1.3 Report Structure

The report is structured as follows:

- Chapter 1: Introduction: Provides an overview to the project background and purpose of study;
- Chapter 2: Literature Review: Provides a brief overview of the key studies likely to influence the outcomes of this study;
- Chapter 3: Supply Analysis: Provides a brief overview of the existing centres hierarchy within Toowoomba Regional Council;
- Chapter 4: Retail Floor Space Assessment: Provides an overview of the future demand for retail development within each catchment;
- Chapter 5: Commercial Office Floor Space Assessment: Provides an assessment of the future demand for commercial office space in Toowoomba Regional Council, in particular the CBD, with consideration given to the likely impact of future coal and gas activity within the Surat Basin on commercial office demand;

- Chapter 6: Large Floor Plate Office Market Assessment: Provides an overview of the commercial office market within Toowoomba City and estimates the potential demand for large floor plate offices within the CBD;
- Chapter 7: Recommendations & Revised Strategy: Provides recommendations for the future centres hierarchy within Toowoomba Regional Council and guidance regarding the policy implications associated with the centres hierarchy; and
- Chapter 8: References: Outlines the references used to complete the study.

The report also contains the following appendices:

- Appendix A: Land Use and Floor Space Survey: An overview of the activity within each activity centre within Toowoomba Regional Council;
- Appendix B: Detailed Socio-Economic Profiles: Provides detailed socio-economic profiles as of the 2006 and 2011 Census for each of the catchments analysed in the study, benchmarked to Toowoomba Regional Council and Queensland;
- Appendix C: Detailed Retail Expenditure Tables: Provides an overview of the detailed retail expenditure tables used in the analysis within Chapter 4 of the report; and
- Appendix D: Comparison Between 2009 and 2013 Centres Hierarchy Recommendations: Provides a comparison between the centres recommendations in the 2009 and 2013 studies.

2 LITERATURE REVIEW

2.1 Toowoomba Regional Council Planning Scheme

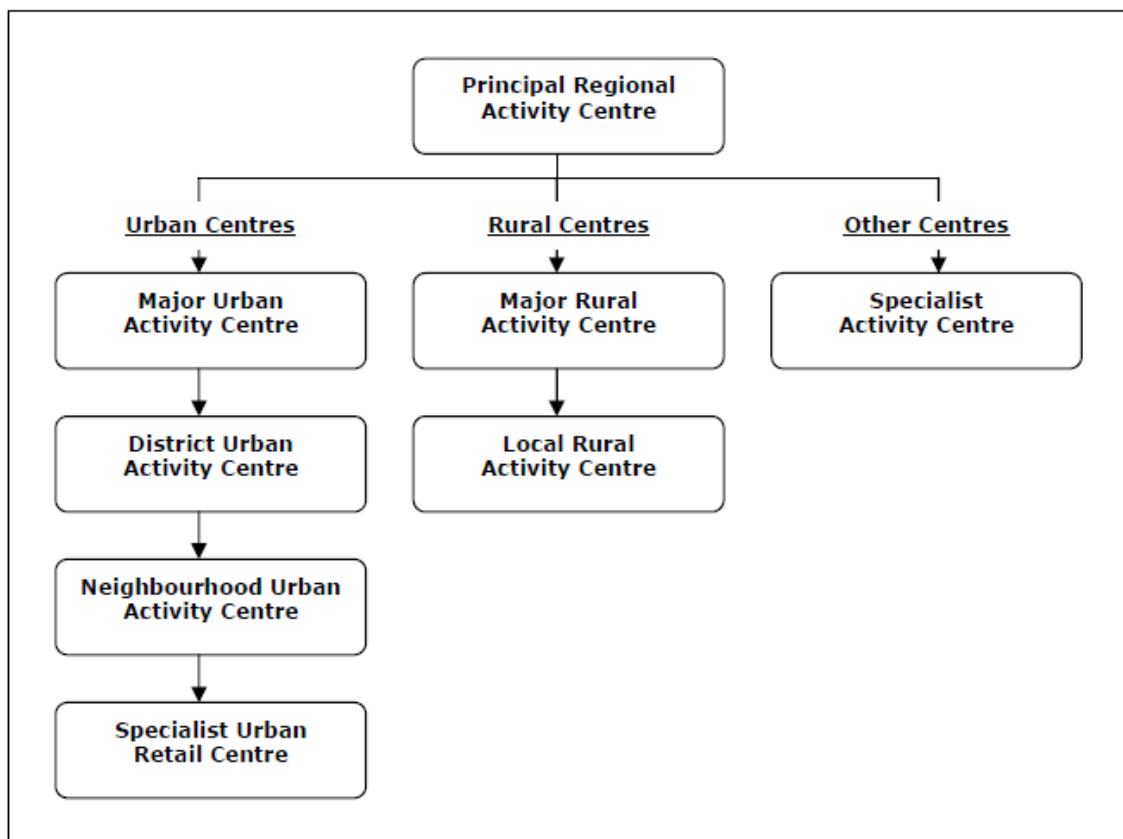
2.1.1 Activity Centres Study (2009)

The Activity Centres Study, prepared by Humphreys Reynolds Perkins Planning Consultants, Urban Economics and Malcolm Middleton Architects, was completed in December 2009.

The purpose of the Activity Centres Study was to identify the preferred activity centres network for Toowoomba Regional Council. In determining the preferred activity centres network, the study considered future commercial office and retail floor space demand, as well as the preferred settlement pattern.

The preferred activity centres network for urban (defined as the former Toowoomba City LGA) and rural (defined as the remainder of Toowoomba Regional Council) centres within Toowoomba Regional Council is outlined in Figure 2.1.

Figure 2.1: Preferred Activity Centres Network



Source: Humphreys Reynolds Perkins, Urban Economics and Malcolm Middleton Architects (2009)

The report estimated that by 2031, there would be demand for an additional:

- Toowoomba CBD:
 - 70,000m² retail;
 - 40,000m²-60,000m² commercial office space;
 - 20,000m² bulky goods floor space;
- Urban Centres:
 - 60,900m² retail floor space;
 - 35,300m² commercial office floor space;
 - 50,120m² bulky goods floor space;
- Rural Centres:
 - 4,500m² retail floor space;
 - 2,600m² commercial office floor space; and
 - 3,500m² bulky goods floor space.

Table 2.1 below provides a summary of the centres in which the additional floor space was projected to be accommodated.

Table 2.1: Activity Centres Projected to Require Additional Retail, Commercial Office and Bulky Goods Floor Space to 2031

Centre Name	Position in Network	Additional Floor Space Required (sqm)		
		Retail	Office	Bulky Goods
Regional Centre		70,000	40,000 - 60,000	20,000
Toowoomba CBD	Principal Activity Centre	70,000	40,000 - 60,000	20,000
Urban Centres		60,900	35,300	50,120
Highfields Town Centre	Major Urban Activity Centre	15,000	7,000	5,000
Kearneys Spring	Major Urban Activity Centre	15,000	14,000	22,000
Wilsonton	Major Urban Activity Centre	10,000	8,000	3,000
Clifford Gardens	Major Urban Activity Centre	-	3,000	-
Bridge Street Plaza	District Urban Activity Centre	1,000	300	-
Wyalga Plaza	District Urban Activity Centre	500	-	-
Newtown Shopping Centre	District Urban Activity Centre	500	200	-
High Street Plaza	District Urban Activity Centre	500	-	-
West Ridge	District Urban Activity Centre	1,000	-	-
Glenvale	District Urban Activity Centre	4,850	300	120
Northlands	Neighbourhood Urban Activity Centre	1,000	200	-
Mary Street Village	Neighbourhood Urban Activity Centre	500	-	-
Tor Street	Neighbourhood Urban Activity Centre	650	200	-
Ruthven Central	Neighbourhood Urban Activity Centre	400	-	-
Tower Shopping Village	Neighbourhood Urban Activity Centre	1,000	300	-
Centenary Heights / Southtown	Neighbourhood Urban Activity Centre	500	-	-
Foodworks on Mackenzie	Neighbourhood Urban Activity Centre	1,500	200	-
Drayton	Neighbourhood Urban Activity Centre	2,600	200	-
Uni Plaza	Neighbourhood Urban Activity Centre	3,000	400	-
Gowrie	Neighbourhood Urban Activity Centre	400	-	-
New Bulky Goods Centre	Specialist Urban Retail Centre	1,000	1,000	20,000
Rural Centres		4,500	2,600	3,500
Oakey	Major Rural Activity Centre	1,000	1,000	1,000
Pittsworth	Major Rural Activity Centre	1,000	1,000	1,000

Centre Name	Position in Network	Additional Floor Space Required (sqm)		
		Retail	Office	Bulky Goods
Crows Nest	Major Rural Activity Centre	1,000	200	500
Millmerran	Major Rural Activity Centre	500	400	500
Clifton	Major Rural Activity Centre	1,000	-	500

Source: Humphreys Reynolds Perkins, Urban Economics and Malcolm Middleton Architects (2009)

2.2 Toowoomba City Centre Master Plan (2009-2010)

In late 2008, Toowoomba City Council engaged Urbis to prepare a master plan for the Toowoomba City Centre (known as the Toowoomba City Centre Master Plan or TCCMP). The final version of the Toowoomba City Centre Master Plan was delivered in March 2010, with background papers completed in late 2009.

2.2.1 Economics & Prosperity Paper (2009)

Purpose of Study

As part of preparing the Toowoomba City Centre Master Plan, a number of background papers were prepared, including:

- Economics & Prosperity;
- Land Use & Housing;
- Traffic & Transport;
- Mobility;
- Public Realm;
- Environmental Values;
- Community Facilities & Services;
- Culture & Heritage;
- Infrastructure; and
- Governance & Institutional Arrangements.

The purpose of the Economics & Prosperity paper was to provide a strategic assessment of retail, commercial and industrial opportunities within the Toowoomba city centre.

Key Findings - Commercial Office

Fragmented land ownership was identified as an impediment to redevelopment activity in Toowoomba. Commercial redevelopment activity has occurred mainly at the eastern end of the Toowoomba city centre where land parcels were less fragmented. The heritage status of a number of buildings in Toowoomba was also identified as an impediment to redevelopment.

The main opportunity identified for commercial office development was government space demand, as it would help establish Toowoomba as a significant regional office location. Urbis estimated that future commercial office floor space demand between 2009 and 2031 would increase by between 37,400m² and 51,200m².

Urbis identified the following commercial office opportunities for the Toowoomba city centre:

- Future commercial floorspace development within the Toowoomba city centre is best located within the existing commercial office precinct, bounded by Herries Street, Ruthven Street and Kitchener Street, Chalk Lane and Chalk Drive;
- Development within the existing commercial office precinct is likely to occur via redevelopment of existing lower density office or other land uses for mainly small to medium sized office developments;
- Development of medium to larger office developments could be undertaken on existing car park sites within the commercial office precinct, particularly those located along Neil Street. Larger scale development could re-incorporate car parking on the first few levels with office floor space located above. The paper also identified the potential to provide ground floor / podium level retail as part of the redevelopment;
- The local government office precinct at the north-west corner of Herries and Ruthven Streets was identified as an opportunity for redevelopment or increased development intensity of the site and existing buildings; and
- The paper recommended that office development located in the Residential Office zone to the west of the Toowoomba city centre boundary along Russell and Margaret Streets be restricted from further development; and office uses within this area should be encouraged to move to the main commercial precinct within the city centre.

Key Findings - Retail

The Economics and Prosperity Paper of the TCCMP estimated that between 2009 and 2031 there would be demand for an additional 86,500m² to 118,000m² of retail floor space in the Toowoomba city centre.

Urbis identified the following retail opportunities for the Toowoomba city centre:

- Expansion of the provision of anchor tenants, including supermarkets, discount department stores and potentially a second department store in the longer term;
- Redevelopment and strengthening of Gardentown Shopping Centre
- Improvement to pedestrian connections and permeability to encourage main street shopping;
- Development of laneways and link to car parking;
- Development of stronger connections between retail and key entertainment and civic functions. This could be realised through the strengthening of an entertainment precinct around the eastern end of Margaret Street. This could form a retail and entertainment precinct anchored by Grand Central at the western end and an entertainment precinct at the eastern end, connected by Margaret Street in between including 'Eat Street';
- Attraction of a wider range of national retail tenants;
- Improvement on the depth of retail offer to differentiate the CBD from the retail available in surrounding suburbs, possibly including some higher end retailers;
- Build on the presence of one off traders and iconic local businesses, which create a point of difference;

- Consider the introduction of Sunday trading to extend City Centre activity including retail. This would encourage residents into the City Centre at the weekends and visitors to extend their stay. This may also assist in capturing some of the retail spending currently escaping from Toowoomba to other regions; and
- Change Thursday night late night trading to Friday night as per Brisbane CBD to encourage people into the city for shopping and other associated activities such as dining and entertainment.

The Economics and Prosperity Paper of the TCCMP outlines the findings of a retail expenditure survey undertaken by Lawrence Consulting in September 2008 on behalf of Toowoomba Regional Council. The survey was sent to 20,000 random households within Toowoomba Regional Council, with 5,646 responses collated. Survey respondents spent an average of \$2,560 per annum outside Toowoomba Regional Council. Based on this result, Urbis estimated that total escape expenditure by households in Toowoomba Regional Council is approximately \$133.1 million per annum. The 2009 Activity Centres Study, prepared by Humphreys Reynolds Perkins Town Planning Consultants, Urban Economics and Malcolm Middleton Architects, does not account for escape expenditure by households in Toowoomba Regional Council.

Urbis undertook a shopper survey at Grand Central Shopping Centre, which indicated that on average, survey respondents shopped in Brisbane once every three months. Approximately half of all respondents indicated they had shopped in Brisbane in the past year. An estimated 6% of respondents reported regularly visiting Brisbane for fashion shopping.

Urbis identified the following gaps in the current retail provision in Toowoomba:

- Greater choice of brands at mid to high level retailers within Brisbane; and
- Limited apparel choice in Toowoomba, with the offer in toys and lifestyle / leisure stores also lacking.

Key Findings - Industrial

The Economics and Prosperity Paper of the TCCMP recommended that industrial development should not be encouraged within the Toowoomba city centre, with existing industrial uses being encouraged to relocate to alternative sites.

Urbis identified the following opportunities for existing industrial sites within the Toowoomba city centre:

- Encourage redevelopment of industrial land close to the centre, potentially through the increase in rates on this land;
- Facilitation of the development of key industrial sites such as the Rail Yards and Foundry either by the Toowoomba Regional Council or State Government;
- Expedient implementation of the Toowoomba Bypass allowing the redirection of unnecessary freight movements out of the centre; and
- Provision of additional industrial land supply through the development of the Charlton Wellcamp industrial precinct at the earliest opportunity.

2.2.2 Implementation Plan (2010)

Purpose of Study

The Toowoomba City Centre Implementation Plan 2010 was developed to provide a comprehensive and flexible framework for the delivery of the Toowoomba City Centre Master Plan. The Implementation Plan outlines the investment priorities, key actions and decision making frameworks that will allow the vision for the Toowoomba city centre to be realised.

Key Findings

The Key Projects and Catalytic Projects chapters of the report (Chapters 4 and 5) are the most relevant to this present study.

The key land use projects, as identified in the Implementation Plan, are as follows:

- Delivery of a defined and thriving retail heart;
- Creation of the Civic Sub Precinct;
- Strengthen the Entertainment and Arts Precinct;
- Establish the Health Precinct;
- Redevelop the railyards / foundry site;
- Redevelop the former TAFE site;
- Redevelop the gasworks site;
- Increase residential uses within the city centre;
- Relocation of the library to a new iconic building within the Civic Sub Precinct;
- Redevelop the Duggan Street car park;
- Redevelop the Milne Bay Aquatic Centre;
- Deliver the West Creek community facilities precinct; and
- Russell Street revitalisation.

Five catalytic projects considered of primary importance to the realisation of the Toowoomba City Centre Master Plan were identified:

- Implementation of the governance framework to lead and guide change in the City Centre (detailed in Section 2 of the Implementation Plan);
- Refurbishment and integration of Grand Central and Gardentown Shopping Centres. This project seeks to further define a compact retail heart for the centre and, based on the scale, required investment and physical change, will have a significant catalytic impact on the City Centre;
- The Civic Sub Precinct project, including the substantial redevelopment of the block between Herries, Victoria, Little and Ruthven Streets as well as the refurbishment of the Milne Bay pool complex;

- A New Garden Square Sub Precinct, focussing on the transformation of the existing Neil Street car park into an attractive new open space for the city centre. This project, through public realm enhancements, aims to catalyse the development of adjacent sites; and
- Road Network Improvements, including a suite of upgrades and alterations to the existing road network and hierarchy with the aim of improving circulation and re-balancing the street scene back toward the pedestrian.

2.2.3 Master Plan Report (TCCMP)

The vision of the Toowoomba City Master Plan is as follows:

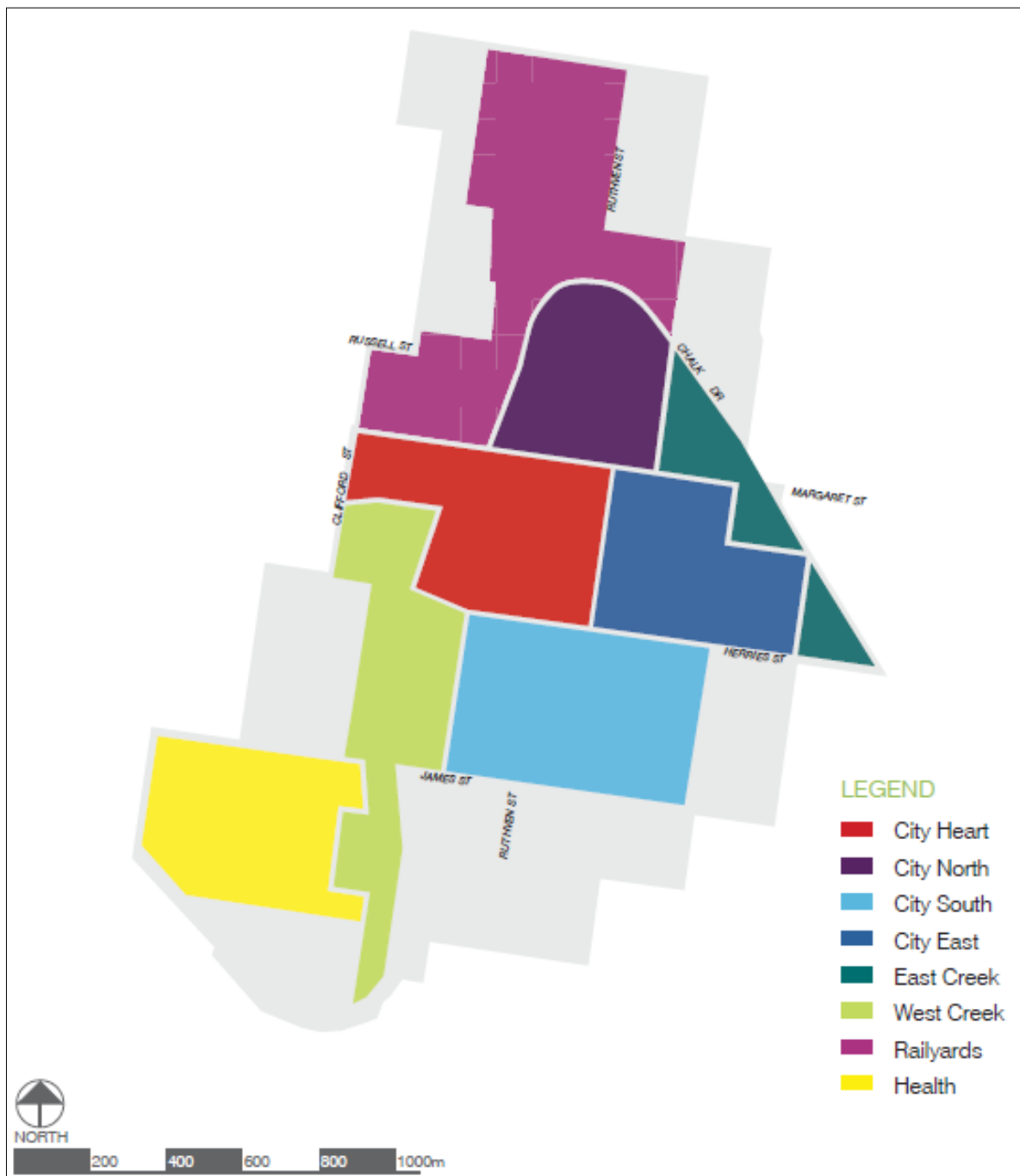
Toowoomba City Centre will capture the opportunities that exist to cement its position as a key regional activity centre. Development and change will be driven by the themes of sustainability, civic vibrancy, heritage, and investment to create a thriving place that is truly the heart of the region.

The Toowoomba City Master Plan aims to:

- Build a first class public realm.
- Adopt new and innovative approaches to planning policy.
- Create a focus for economic prosperity.
- Balance the protection of heritage with contemporary architecture.
- Deliver a sustainable future.
- Capitalise on key sites and catalytic projects.
- Balance traffic movements and car parking provision with a high quality pedestrian environment.

There were eight precincts defined within the Toowoomba City Master Plan, as outlined in Figure 2.3.

Figure 2.2: Precinct Plan



Source: Urbis (2010b)

Table 2.2 below summarises the vision for each precinct.

Table 2.2: Vision and Objective by Precinct, Toowoomba City

Precinct	Vision
City Heart	Toowoomba's City Heart will be the 'centre' for the city and the civic, shopping and recreational focus for the Darling Downs, accommodating major employment, retail, commercial and recreational developments within a framework of fine heritage buildings and radically improved streets and public spaces that celebrate Toowoomba as a Garden City. The City Heart will, through the redevelopment of key sites, integrate and consolidate the city centre shopping and civic experience; improve relationships with West Creek; provide exciting new civic and community developments, and be regarded as a leading example of transit oriented development and temperate to sub-tropical design.
City East	The City East Precinct will become a thriving focus for employment and entertainment that is characterised by a fine mesh of laneways, tree lined streets and a rich diversity of building types set around a major new garden square. The City East Precinct will be intrinsically connected to the historic arteries of Margaret and Ruthven Streets and offer direct pedestrian connection through the redeveloped former TAFE site to East Creek and Queens Park.
City North	The City North Precinct sits immediately to the north of Margaret Street and forms an urban peninsula defined by the visual amenity of the two adjacent creek corridors. The Precinct plays a key role as a major gateway to the centre and in itself contains fine groupings of heritage buildings along Russell Street in playful combination with significant new residential and mixed-use development opportunities to deliver a unique urban village in the heart of the city.
City South	The vision for the City South Precinct is of a dynamic and evolving urban community of employment and residential uses that benefits from its proximity to the City Heart, City East, West Creek and the Health Precinct. Over time the existing industrial and service uses will consolidate into a more efficient urban form containing areas of employment as well as residential development that benefits from its central location and the significant views to the north of the green ridgelines that frame the city.
East Creek	The East Creek Precinct provides an attractive balance of linear green spaces, access to Queens Park, and first class residential development. Investment in the environmental quality of the Creek corridor itself will ensure it supplements the wider open space system of the city centre and will drive the creation of a new park side precinct characterised by a striking balance between built form and landscape.
West Creek	West Creek will become the major green recreational artery for the city centre. Containing a new aquatic complex and a range of existing recreational uses, the environmental quality of the corridor will be greatly improved to encourage its use as a major part of the city wide cycle and pedestrian movement network. Lined by a mix of community facilities and medium to high-density residential development, West Creek will become one of the city's major attractions and consolidate further the garden city image of Toowoomba.
Railyards	The Railyards Precinct represents a once in a generation opportunity to deliver an exceptional mixed-use revitalisation project in a post industrial setting immediately adjacent to the City Heart of Toowoomba. The vision for the Railyards Precinct is to create an intense urban village that is characterised by active streets and spaces and that benefits from a direct relationship with a major new city park on the redundant (nonoperational) railway land to the west. The precinct has direct access to the proposed outer circulating road boulevard network and services and facilities of the city centre to the south.
Health	The Health Precinct is centred on the existing Toowoomba hospital and seeks to provide a range of synergistic uses and expansion possibilities for this key employment driver of the centre. The vision is to, over time, develop an attractive health campus in which buildings are set around open courtyards and clear points of arrival and to connect the campus to adjacent precincts and the city heart via a network of pedestrian and cycle connections.

Source: Urbis (2010b)

2.3 Toowoomba Region Economic Development Strategy

The Toowoomba Region Economic Development Strategy has been developed around a strategic vision and nine key economic policy drivers relevant at the Toowoomba Region level.

The vision for the Toowoomba Region Economy is as follows:

To foster an innovative, sustainable and balanced economy that provides valuable employment opportunities for residents and enhances the region's high quality of life.

The strategies identified as a basis of supporting specific outcomes and potential actions aimed at achieving the Regional Economic Development Vision:

- Key Policy Driver 1: Economic and business governance;
- Key Policy Driver 2: Creating a supportive business environment;
- Key Policy Driver 3: Infrastructure and mechanisms to support growth;
- Key Policy Driver 4: Diversification and value adding;
- Key Policy Driver 5: Skills and training;
- Key Policy Driver 6: Marketing and investment attraction;
- Key Policy Driver 7: Enhancing the visitor experience;
- Key Policy Driver 8: Enhance tertiary services provision in Toowoomba City; and
- Key Policy Driver 9: Sustainable regional centres.

The objective, rationale and desired economic outcomes for each key policy driver is summarised in Table 2.3 below.

Table 2.3: Objective, Rationale and Desired Economic Outcomes for each Key Policy Driver

Key Policy Driver	Objective	Rationale	Desired Economic Outcomes
Key Policy Driver1	To provide a governance framework for the delivery of economic development initiatives and enhance the quality of business governance within the Toowoomba Region.	To ensure that the execution of regional economic development initiatives is efficient and coordinated as it is imperative that economic development actors (including Council, TSBE, major institutions and businesses) understand their roles, responsibilities and accountabilities.	• Establishment of a framework for the delivery of economic development initiatives within the Toowoomba Region; • Establishment of a framework to collaborate with economic development organisation outside the Toowoomba Region to deliver broader regional initiatives; • National and state government decision making processes pertinent to the Toowoomba Region are based in-region; and • Facilitate a program to develop business and management skills in local businesses.
Key Policy Driver 2	To foster a supportive environment for existing and prospective businesses from start-up to maturation.	The creation of an environment conducive to business will assist in retaining and developing existing businesses and attract or encourage the start-up of new businesses in the region.	• Retention, development and attraction of local businesses (including start-ups); • Review of the local regulatory environment to ensure there are no layers of unnecessary regulation and that regulation is being administered efficiently; • New and prospective businesses have reliable access to market information and emerging trends in the Toowoomba Region; • There is an adequate supply of appropriately zoned land for the expansion of existing businesses and/or relocation of new businesses to the region; and • Property owners invest in building refurbishment and redevelopment with confidence.
Key Policy Driver 3	To increase the competitiveness and investment attractiveness of the Toowoomba Region through the development of an efficient infrastructure network.	An efficient infrastructure network provides accessibility to and the efficient movement of necessary inputs, such as energy, water, materials and labour, which is imperative for the sustainability of local businesses and the attraction of new businesses to the region.	• Infrastructure is delivered in a timely and cost effective manner that facilitates ongoing business development and enhances the region's competitive advantages; • Collaboration in the delivery of strategic inter-regional infrastructure; • Freight efficiency is enhanced through a Toowoomba Region transport & logistics strategy; • Air services (including RPT, charter, aerial work and flight training) within Toowoomba are expanded; • Development assessments are conducted within statutory timeframes; • Businesses have access to cutting edge information and communications technology throughout the region; and • Liveability within the Toowoomba Region is enhanced.

Key Policy Driver	Objective	Rationale	Desired Economic Outcomes
Key Policy Driver 4	Businesses within the Toowoomba Region leverage off the economic drivers of the broader region to diverse and develop value adding opportunities within the agricultural and mining sectors.	The mining sector is expected to experience rapid growth in the broader region within which Toowoomba is located. Agricultural represents the traditional economic base of the Toowoomba Region. Diversification and value adding within both the agricultural and mining sectors would insulate the Toowoomba Region from the cyclical nature of these primary sectors while also creating greater regional employment and wealth.	• Toowoomba remains the agricultural and horticultural services hub for the Darling Downs and South Western Queensland; • Toowoomba is the professional and contracting services base for the Surat Basin; and • Upstream and downstream value adding related to the agricultural and mining sectors is expanded.
Key Policy Driver 5	To respond to the evolving skills and training requirements of industry to ensure businesses have access to appropriately skilled labour to innovate and grow.	With labour being a key input to most businesses, access to a suitable skilled labour force is a key requirement to meet the challenges of an increasingly competitive and globalised economy. Access to a skilled workforce is a key investment criteria for businesses looking to establish operations in a new region. Additionally, the nurturing of a culture of learning and skills development can provide an engine room for regional innovation and investment attractiveness.	• Ongoing engagement and collaboration between all levels of government, industry and training providers within the Toowoomba Region; • The Toowoomba Region hosts regional scale conference and training facilities; and • Tertiary education and vocational training services and facilities are available in the region for a wide range of skill sets.
Key Policy Driver 6	To position and market the Toowoomba Region as an investment location of choice and to identify businesses that complement or leverage off the region's competitive advantages.	The communication of the region's competitive advantage is imperative to attract new businesses and investment to the region. The attraction of new businesses brings new markets and opportunities to the region and a diversification and growth in the region's economic base.	• The development of a Toowoomba Region marketing plan to guide regional marketing and branding strategies; • Recording and tracking of new business enquiries; • Ongoing engagement and collaboration between industry, the community and all levels government; and • The Toowoomba Region develops national and international profile as a place to invest and grow.

Key Policy Driver	Objective	Rationale	Desired Economic Outcomes
Key Policy Driver 7	To enhance the quality of the visitor experience within the Toowoomba Region through the provision of quality accommodation, catering and attractions.	Tourism is a highly segmented industry with the potential to add value to the Toowoomba Region at many levels. A quality visitor experience can significantly add to the perception of a region as a place to do business. In addition to recreational tourism and those visiting family and friends, the Toowoomba Region is likely to experience significant growth in business travellers off the back of major resource and infrastructure investment in the Surat Basin.	• Toowoomba City is considered a desirable location for business events, and hosts a number of conferences of regional, state and national significance; and • The Toowoomba Region is considered an attractive destination by intrastate, interstate and overseas visitors, offering a range of activities and services to enhance the visitor experience.
Key Policy Driver 8	To maximise the range of higher order business and community services available in the region.	The ready availability of higher order services supports and facilitates investment attraction, deepens regional business skill sets and enhances regional quality of life.	• A full range of professional and business services is available in Toowoomba City; • Existing high order business and personal services are retained and expanded in Toowoomba; • The health and wellbeing sector continues to expand and develop; and • The education and training sector continues to expand and develop.
Key Policy Driver 9	To ensure the sustainability of the Toowoomba Region's regional centres.	The Toowoomba Region comprises a series of regional communities each with its own character and competitive advantages. It is imperative that these regional centres prosper to provide the region with depth and diversity.	• Toowoomba has a network of sustainable regional centres; • Regional communities, such as Yarraman, Crow's Nest, Oakey, Pittsworth, Millmerran and Clifton, establish their own intrinsic competitive advantages and character; and • Regional centres have access to project funding.

Source: Economic Associates (2012)

3 SUPPLY ANALYSIS

3.1 Existing Activity within Toowoomba Regional Council

Inspections were carried out on all designated retail and commercial centres across Toowoomba Regional Council based on the existing zonings as per the existing Toowoomba Regional Council planning scheme. The inspections noted the details of each individual tenancy, based on the following broad categories:

- Retail;
- Commercial & medical;
- Community & other; and
- Vacant shopfront.

The floor space inventory included all ground floor tenancies and accessible upper level tenancies. Inaccessible upper level tenancies were excluded from the floor space analysis.

These categories are consistent with the classifications in the previous Activity Centres Study.

Vacancies in the Toowoomba CBD were classified as being either vacant retail tenancies or vacant commercial office tenancies.

Activity within Toowoomba Regional Council was divided into the following geographic areas:

- Toowoomba CBD (as defined in the Toowoomba City Centre Master Plan):
 - Toowoomba CBD core (consistent with the Principal Centre zone in the Toowoomba Regional Council planning scheme);
 - Toowoomba CBD mixed use precinct (consistent with the Mixed Use Precinct zone in the Toowoomba Regional Council planning scheme);
- Remainder of Toowoomba City (i.e. Toowoomba City less Toowoomba CBD); and
- Remainder of Toowoomba Regional Council.

This section of the report provides an overview of the major findings of the land use and floor space survey, with detailed tables provided in Appendix A.

Figure 3.1 and Figure 3.2 provide an overview of the existing centres network within Toowoomba Regional Council.

Figure 3.1: Existing Centres Network, Toowoomba Regional Council

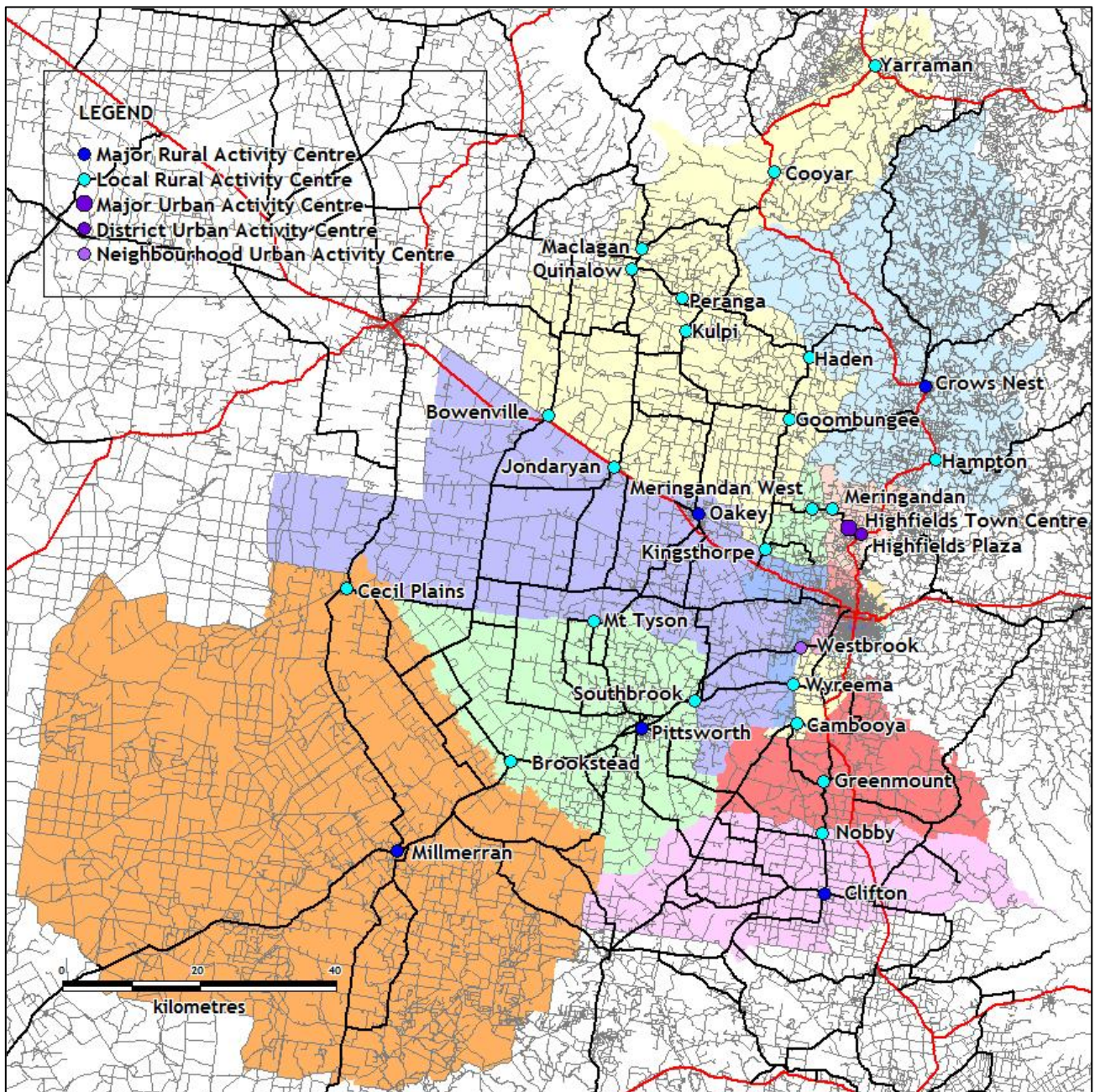
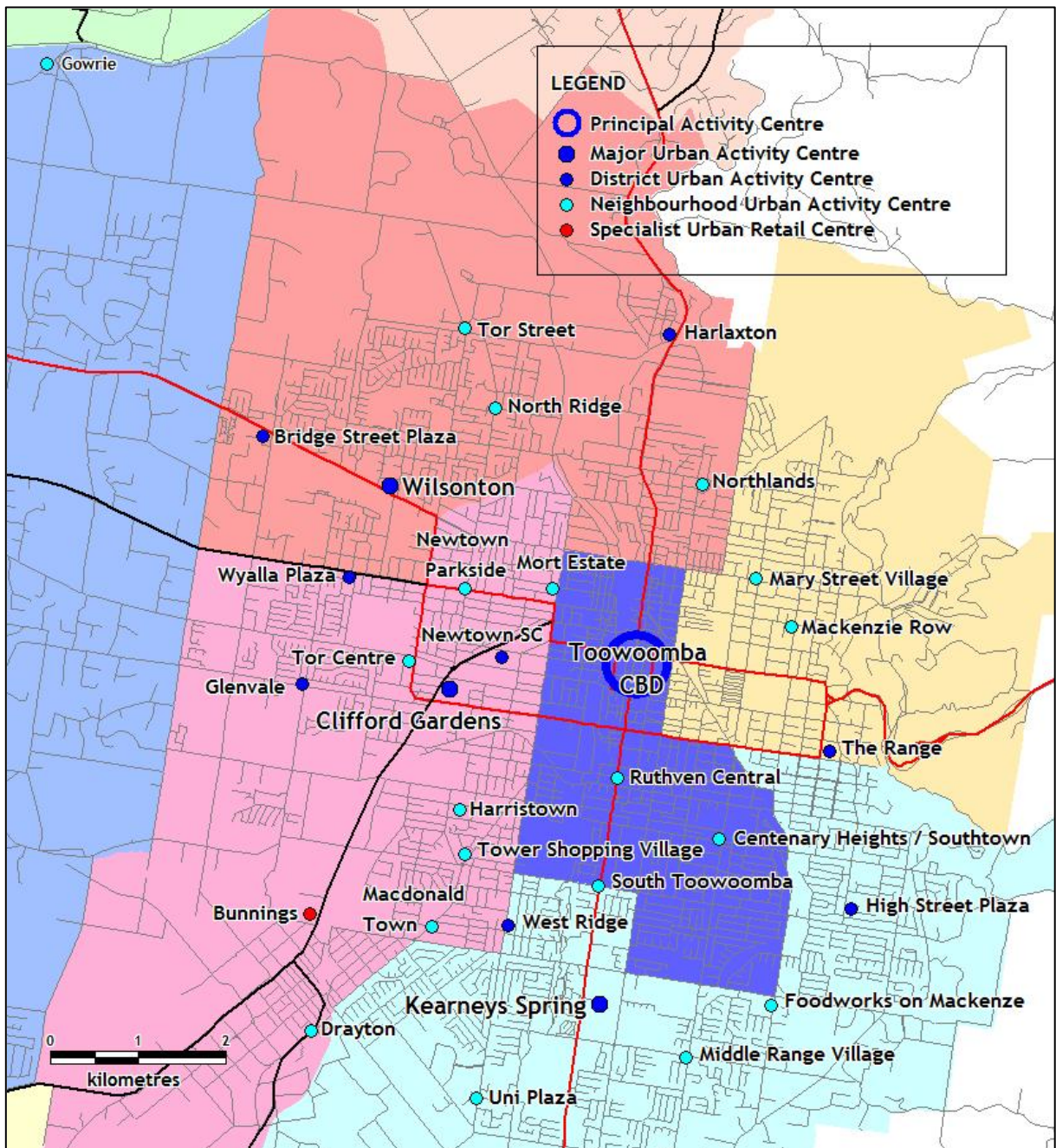


Figure 3.2: Existing Centres Network, Toowoomba City Inset



3.1.1 Toowoomba CBD

Toowoomba CBD Core

- There is an estimated 109,157m² of retail floor space and 137,453m² of commercial office floor space within the Toowoomba CBD core;
- The largest retail centre within the Toowoomba CBD core is Grand Central, with an estimated 44,374m² of floor space. The majority of this centre (96.5%) is occupied by retail tenancies. A small area of vacant shopfronts existed in the centre (1.5%);
- The retail vacancy rate within the Toowoomba CBD core is 9.7%, with an 8.2% vacancy rate recorded for commercial office tenancies;
- A number of vacant tenancies within the Toowoomba CBD are of a low standard and in need of refurbishment;
- There are a number of low rent tenancies identified within the Toowoomba CBD Core, including discount variety stores, thrift shops and adult shops; and
- Of the 62 commercial office vacancies identified within the Toowoomba CBD, the majority are located within the Toowoomba CBD core (53 vacancies). However, the average size of commercial office vacancies in the Toowoomba CBD core (231m²) is significantly lower than in the Toowoomba CBD mixed use precinct (798m²). Hence within the mixed use precinct there appears to be a small number of larger vacant tenancies.

Toowoomba CBD Mixed Use Precinct

- There is an estimated 41,685m² of retail floor space and 54,581m² of commercial office floor space within the Toowoomba CBD mixed use precinct;
- The retail vacancy rate within the Toowoomba CBD mixed use precinct is 10.0%, with a 11.6% vacancy rate recorded for commercial office tenancies;
- The largest commercial office vacancy within the Toowoomba CBD mixed use precinct is the former Toowoomba Chronicle building, offering 4,000m² of commercial office floor space;
- The Toowoomba CBD mixed use precinct contains a number of tenancies of a low standard and in need of refurbishment; and
- There is a number of low rent tenancies identified within the Toowoomba CBD mixed use precinct including discount variety stores, thrift shops and adult shops.

3.1.2 Remainder of Toowoomba City

- The remainder of Toowoomba City is dominated by three major centres:
 - Kearney Springs (46,647m²);
 - Clifford Gardens (32,082m²); and
 - Wilsonton (17,681m²);
- The Kearney Springs major centre has a 2.8% vacancy rate, significantly less than the 14% vacancy rate recorded in 2009;

- The Clifford Gardens major centre was 100% occupied, compared to a vacancy rate of 0.5% recorded in 2009;
- The Wilsonton major centre is operating slightly under capacity (2.8% vacant shopfronts), however this was lower than the 3.6% vacancy rate recorded in 2009;
- As a whole, Toowoomba City (excluding CBD) recorded a vacancy rate of 6.1%, (down from the 9% vacancy rate recorded in 2009), with vacancy rates highest in the following centres:
 - McDonald Town (44% of total floor space at the centre or 440m² vacant floor space);
 - Newtown Parkside (25% of total floor space at the centre of 410m² of vacant floor space); and
 - South Toowoomba (22% of total floor space at the centre or 300m² of vacant floor space); and
- Half of the centres (outside of the three above listed centres) are fully tenanted (12 out of 24 suburban centres have no shopfront vacancy).

3.1.3 Remainder of Toowoomba Regional Council

- The major rural activity centres within Toowoomba Regional Council are:
 - Oakey (19,050m²); and
 - Pittsworth (18,490m²);
- Other significant centres within the remainder of Toowoomba Regional Council are:
 - Highfields Village (major centre - 6,862m²);
 - Millmerran (local centre - 6,620m²);
 - Crows Nest (major centre - 6,487m²); and
 - Highfields Plaza (district centre - 5,180m²);
- There are numerous small rural community centre townships across Toowoomba Regional Council, with several consisting of a single multi-functional general store. With increased urbanisation and declining rural industries, a number of these centres have recorded declines in retail activity.

3.1.4 Summary of Existing Supply

Toowoomba City

Tables 3.1 and 3.2 below provide a summary of the existing retail and commercial office provision within the former Toowoomba City by precinct.

Vacancies within the Toowoomba CBD are classified as either retail or commercial. However, it is difficult to ascertain whether vacancies outside of the Toowoomba CBD were either retail or commercial tenancies as they were typically shopfront. As a result, all vacancies outside the Toowoomba CBD have been enumerated as retail vacancies.

Table 3.1: Summary of Existing Retail Activity (m²), Toowoomba City

	Traditional Retail	Bulky Goods	Vacant	Vacancy Rate
Toowoomba CBD	107,188	43,654	16,285	9.7%
Core	84,512	24,645	11,670	9.7%
Mixed Use Zone	22,676	19,009	4,615	10.0%
Major Centres	59,273	23,517	1,654	2.0%
Kearney Springs	25,843	15,980	1,214	2.8%
Clifford Gardens	22,235	3,727	-	-
Wilsonton	11,196	3,809	440	2.8%
Remainder of Toowoomba City	37,529	38,237	8,690	10.3%
Total Toowoomba City	203,991	105,407	26,629	7.9%

Note: Vacancies in non-CBD locations may include potential commercial tenancies.

Source: Economic Associates inventory, March 2013

Table 3.2: Summary of Existing Commercial Office Activity (m²), Toowoomba City

	Occupied Floor space	Vacant Floor space	Vacancy Rate
Toowoomba CBD	192,034	19,422	9.2%
Core	137,453	12,244	8.2%
Mixed Use Zone	54,581	7,178	11.6%
Major Centres			
Kearney Springs	1,540	-	-
Clifford Gardens	2,360	-	-
Wilsonton	1,924	-	-
Remainder of Toowoomba City	7,190	-	-

Note 1: Commercial tenancies in non-CBD locations are typically shopfront; as such these vacancies are enumerated in retail supply.

Note 2: Occupied floor space estimates include government offices (classified within community & other category in Appendix A).

Source: Economic Associates inventory, March 2013

Remainder of Toowoomba Regional Council

Tables 3.3 and 3.4 below provide a summary of the existing retail and commercial office provision within the remainder of Toowoomba Regional Council by precinct.

As mentioned above, all vacancies within the remainder of Toowoomba Regional Council have been enumerated as retail vacancies as they were typically shopfront.

Table 3.3: Summary of Existing Retail Activity (m²), Remainder of Toowoomba Regional Council

	Traditional Retail	Bulky Goods	Vacant	Vacancy Rate
Highfields	9,712	830	400	3.7%
Gowrie	1,260	-	-	-
Westbrook	600	-	60	9.1%
Cambooya	410	-	-	-
Crows Nest	3,480	1,190	1,005	17.7%
Rosalie	2,652	80	2,538	48.2%
Jondaryan	8,941	4,090	492	3.6%
Greenmount	90	-	60	40.0%
Pittsworth	9,480	4,010	1,050	7.2%
Millmerran	2,220	2,040	1,230	22.4%
Clifton	1,500	1,220	520	16.0%
Total	40,345	13,460	7,355	12.0%

Note: Vacancies in non-CBD locations may include potential commercial tenancies.

Source: Economic Associates inventory, March 2013

Table 3.4: Summary of Existing Commercial Office Activity (m²), Remainder of Toowoomba Regional Council

	Occupied Commercial Office Floor Space
Highfields	1,680
Gowrie	330
Westbrook	-
Cambooya	160
Crows Nest	570
Rosalie	880
Jondaryan	2,277
Greenmount	-
Pittsworth	2,090
Millmerran	760
Clifton	530
Total	9,277

Note: Commercial tenancies in non-CBD locations are typically shopfront, as such these vacancies are enumerated in retail supply.

Source: Economic Associates inventory, March 2013

3.2 Development Approvals

This section of the report provides an overview of the development approvals granted and yet to be constructed as of March 2013¹, based on information provided by Toowoomba Regional Council.

3.2.1 Toowoomba City Approvals

Dan Murphy's Wilsonton

In August 2011, development approval was granted for a 1,480m² Dan Murphy's bottle shop and a 12 unit motel development adjacent to the existing Wilsonton Hotel and BWS bottle shop,

¹ Economic Associates updated the retail and commercial inventory for Toowoomba Regional Council as of March 2013.

located within the Wilsonton major centre zone at 40 Richmond Drive, Wilsonton. Site inspections indicate the Dan Murphy's is yet to be constructed.

Kearneys Spring Medical Centre

The Kearney's Spring Medical Centre is located at 881 Ruthven Street, Kearneys Spring. The centre is an estimated 2,692m² in size, and includes four medical consulting rooms, a procedure room, dentist, pathology, x-ray and ancillary facilities such as common areas, a training room and board room. Of the 2,692m² floor space at the centre, 205m² is occupied by a cafe and pharmacy. The Kearneys Spring medical centre was approved in March 2012.

Northpoint Shopping Centre

The proposed Northpoint Shopping Centre is located at 121-129 Ruthven Street, Harlaxton and comprises the following elements:

- A 3,226m² full line supermarket;
- 212m² commercial office;
- 393m² medical centre; and
- 2,586m² specialty tenancies.

Toowoomba North Convenience Centre Development

The proposed convenience centre in Toowoomba North is located at the corner of Ruthven and North Streets, Harlaxton. The 1,003m² centre includes a 488m² shop (most likely to be a convenience store), three fast food tenancies and a cafe tenancy. The centre was approved in December 2011.

Harlaxton Aldi

The proposed 1,542m² Aldi is located at the corner of North and Parrot Streets, Harlaxton and was approved in December 2012.

Kearneys Spring Masters Store

A 13,310m² Masters Hardware store was approved in October 2012 at 471 Hume Street, Kearneys Spring, and will be the first Masters store in Toowoomba Regional Council. The centre is contained within the major centre zone and is located immediately to the east of the Harvey Norman bulky goods centre. The store is currently under construction and due to open in May 2013.

Drayton Central

In July 2012, approval was granted for a supermarket anchored centre at 48-54 Brisbane Street, Drayton. The centre is due to open October 2013 and will be anchored by a 3,563m² Woolworths and also include 1,090m² of specialty tenancies.

Harristown Convenience Centre

In April 2013, development approval was granted for a 199.9m² supermarket and 249.7m² of specialty tenancies at 538 Alderley Street, Harristown.

Ruthven Street Mixed Use Centre

In May 2011, development approval was granted for a mixed use development at 677-683 Ruthven Street, South Toowoomba. The approved development comprises:

- 32 residential apartments;
- 349m² of takeaway food / dining tenancies;
- 1,038m² medical centre;
- 151m² office;
- 344m² shop; and
- 1,926m² retail showroom.

Healy Street Mixed Use Centre

In December 2011, development approval was granted for a mixed use development at 4 Healy Street, Toowoomba. The approved development comprises:

- 86 residential apartments;
- 573m² of takeaway food / dining tenancies;
- 491m² shop; and
- 100m² office.

Cohoe Street Food Outlets

In December 2012, approval was granted for 1,776m² of take away / dining tenancies, with approximately half of the floor space to be occupied by KFC and McDonalds. The approval is currently under appeal.

Newtown McDonalds

In June 2011, development approval was granted for a 353.5m² McDonalds restaurant at 1-15 Glenvale Road, Newtown. It is understood the McDonalds restaurant opened in late April 2013.

South Toowoomba Food Outlets

In February 2012, development approval was granted for 415m² of takeaway food / dining tenancies at 795-797 Ruthven Street, South Toowoomba.

Kearneys Spring Food Outlet

In March 2013, development approval was granted for a 112m² takeaway food / dining tenancy at 857-867 Ruthven Street, Kearneys Spring.

North Toowoomba Office Development

In March 2013, development approval was granted for 1,169m² of commercial office tenancies at 151 Ruthven Street, North Toowoomba.

East Toowoomba Medical Centre

In November 2012, a 235m² medical centre was approved at 90 Curzon Street, East Toowoomba.

3.2.2 Remainder of Toowoomba Regional Council

Glenvale Centre

In January 2009, development approval was granted for a 5,087m² retail development at Glenvale, including a 3,100m² full line supermarket and 1,987m² of specialty retail.

Crows Nest Centre

In February 2009, approval was granted for a 1,450m² limited line supermarket at 14 William Street, Crows Nest. The applicant requested an extension of the approval currency period as of March 2013, with this request currently under assessment.

Kingsthorpe Centre

In June 2009, approval was granted for 1,729m² of retail floor space, to be constructed over two stages:

- Stage 1: 200m² supermarket and 249m² specialty retail; and
- Stage 2: 600m² supermarket expansion and additional 680m² of specialty retail.

The applicant requested an extension of the approval currency period as of March 2013, with this request currently under assessment.

3.3 Summary of Existing and Future Supply

Toowoomba City

Table 3.5 below provides a summary of the existing and future retail and commercial floor space supply within Toowoomba City, assuming that all development approvals are constructed.

Table 3.5: Summary of Existing and Future Retail and Commercial Office Supply, Toowoomba City

	Traditional Retail	Bulky Goods	Commercial Office
Toowoomba CBD	107,188	43,654	192,034
Core	84,512	24,645	137,453
Mixed Use Zone	22,676	19,009	54,581
Major Centres	61,070	36,827	8,311
Kearney Springs	26,160	29,290	4,027
Clifford Gardens	22,235	3,727	2,360
Wilsonton	12,676	3,809	1,924
Remainder of Toowoomba City	55,291	40,163	10,488
Total Toowoomba City	223,549	120,643	210,833

Source: Economic Associates inventory, March 2013 and information provided by Toowoomba Regional Council

Remainder of Toowoomba Regional Council

Table 3.6 below provides a summary of the existing and future retail and commercial floor space supply within the remainder of Toowoomba Regional Council, assuming that all development approvals are constructed.

Table 3.6: Summary of Existing and Future Retail and Commercial Office Supply, Remainder of Toowoomba Regional Council

	Traditional Retail	Bulky Goods	Commercial Office
Highfields	9,712	830	1,680
Gowrie	2,989	-	330
Westbrook	5,687	-	-
Cambooya	410	-	160
Crows Nest	4,930	1,190	570
Rosalie	2,652	80	880
Jondaryan	8,941	4,090	2,277
Greenmount	90	-	-
Pittsworth	9,480	4,010	2,090
Millmerran	2,220	2,040	760
Clifton	1,500	1,220	530
Total	48,611	13,460	9,277

Source: Economic Associates inventory, March 2013 and information provided by Toowoomba Regional Council

4 RETAIL FLOOR SPACE ASSESSMENT

The retail floor space assessment presented here differs from the approach taken in the 2009 Activity Centres Study prepared by Humphreys Reynolds Planning Consultants, Urban Economics and Malcolm Middleton Architects because it includes:

- Consideration of retail floor space demand by catchment;
- Consideration of retail expenditure inflows / outflows from the Toowoomba region; and
- Quantitative assessment of existing and future retail supply against existing and future retail demand (i.e. calculation of the supply-demand balance).

The 2009 Activity Centres Study assessed retail floor space demand for Toowoomba Regional Council as a whole², with no estimates presented for retail floor space demand within each catchment. Our approach presents retail floor space demand estimates for Toowoomba City and each of the rural catchments to facilitate a quantitative assessment of future demand.

The 2009 Activity Centres Study did not consider the potential inflows (injection) and outflows (leakage) of the retail expenditure across the region, but rather assumed that the level of escape expenditure³ from Toowoomba Regional Council was precisely offset by expenditure inflows from leisure and business visitors to the region. The analysis presented here considers the following retail expenditure inflows / outflows:

- Retail expenditure inflows:
 - Retail expenditure inflows from the Darling Downs and South West and Lockyer Valley regions to centres within Toowoomba City;
 - Retail expenditure inflows from the Toowoomba rural catchments to centres within Toowoomba City;
- Retail expenditure outflows:
 - Retail expenditure outflows from Toowoomba City to centres outside Toowoomba Regional Council (e.g. Brisbane and Gold Coast); and
 - Retail expenditure outflows from the Toowoomba rural catchments to centres outside Toowoomba Regional Council.

This study also considers the supply-demand balance for retail floor space within Toowoomba City and each of the rural catchments within Toowoomba Regional Council. Previous activity centres studies (2004 and 2009) undertaken for Toowoomba Regional Council (and previously Toowoomba City Council) only allocated future demand based on incremental floor space demand (i.e. when additional floor space demand over and above existing levels). This approach may be appropriate when the existing retail market is considered to be in equilibrium (i.e. there are no indications the market is in oversupply or unbalanced). However, the land use survey carried out for this present study highlighted this was unlikely to be the case, particularly within the CBD, due to the following factors:

² Refer to Table 6.6 of the 2009 Activity Centres Study report (pg 93)

³ Otherwise referred to as retail expenditure leakage

- High vacancy rate within the CBD: The retail vacancy rate within the Toowoomba CBD was estimated at 9.7%, as compared to only 2.0% within the major centres. A 'healthy' vacancy rate is considered to be in the order of 5% to 7%; at these levels new entrants can access vacant tenancies while centre owners are not exposed to a high vacancy burden. Estimated vacancy rates for Toowoomba City suggest that while the major centres are performing strongly, the CBD is performing below average;
- Quality of tenancies: Underperforming centres are typically characterised by poor quality tenancies as evidenced by a lack of ongoing investment and refurbishment. The Toowoomba CBD in particular has a large number of tenancies in need of refurbishment; and
- Quality of tenants: The Toowoomba CBD has a relatively high representation of 'low rent seeking' tenants. Examples of this include thrift/second hand shops, discount variety stores (including chain and independent stores), adult shops and a range of tenancies that do not trade standard business hours. These types of tenancies typically seek lower than average rents, due to their relatively low sales productivities and/or quality expectations. A higher incidence of these types of tenants tends to suggest an underperforming centre.

Based on the above factors, it was determined that it was appropriate to investigate the supply-demand balance of the Toowoomba City retail market. Or put another way, the above factors suggested that the Toowoomba City retail market is not in equilibrium.

In recent times, Toowoomba Regional Council has undertaken a number of policy initiatives to reinforce the primacy of the Toowoomba CBD in the centres hierarchy, most notably the implementation of the Toowoomba City Master Plan. It is envisaged that these policy initiatives will strengthen and reinforce the role of Toowoomba CBD in the centres hierarchy and lead to reduced vacancy rates and improved tenancy quality and mix over time.

4.1 Catchment Definition

For the purpose of this present study, sixteen catchments have been identified within Toowoomba Regional Council. The study areas have been defined based on 2008 Australian Bureau of Statistics (ABS) statistical local area boundaries (SLA). The catchments defined are consistent with those presented in the 2009 Activity Centres Study.

The sixteen catchments have been placed into three sub-categories, these being:

- Toowoomba City catchments: These five catchments make up the former Toowoomba City boundary;
- TSD Balance catchments: These four catchments are located outside of the former Toowoomba City boundary but form part of the broader Toowoomba Statistical District (TSD); and
- Toowoomba Rural catchments: These seven catchments comprise the remainder of Toowoomba Regional Council.

Table 4.1 below summarises the localities contained within each of the study areas.

Table 4.1: Catchment Areas, Toowoomba Regional Council

Catchment Area	Localities / Suburbs
Toowoomba City Catchments	
Toowoomba Central	Toowoomba CBD, Centenary Heights, South Toowoomba
Toowoomba North-East	Mt Lofty, Prince Henry Heights
Toowoomba North-West	Harlaxton, North Toowoomba, Rockville, Wilsonton
Toowoomba South-East	Rangeville, Middle Range, Kearney Springs, Darling Heights
Toowoomba West	Newtown, Toowoomba West, Harristown, Drayton
TSD Balance Catchments	
Highfields	Highfields, Meringandan
Gowrie	Gowrie Junction, Kingsthorpe, Meringandan West
Westbrook	Glenvale, Torrington, Westbrook, Charlton, Wellcamp
Cambooya	Cambooya, Wyreema
Toowoomba Rural Catchments	
Crows Nest	Crows Nest, Hampton
Rosalie	Yarraman, Goombungee, Cooyar, Bowenville
Jondaryan	Oakey, Jondaryan
Greenmount	Greenmount, East Greenmount
Pittsworth	Pittsworth, Brookstead, Mt Tyson (i.e. former Pittsworth Shire)
Millmerran	Millmerran, Cecil Plans (i.e. former Millmerran Shire)
Clifton	Clifton (i.e. former Clifton Shire)

Source: Australian Bureau of Statistics (2011a)

Figure 4.1 below provides a geographic representation of the catchments within Toowoomba Regional Council. Figure 4.2 below provides clarification regarding the catchment definition within Toowoomba City.

Figure 4.1: Catchment Definition, Toowoomba Regional Council

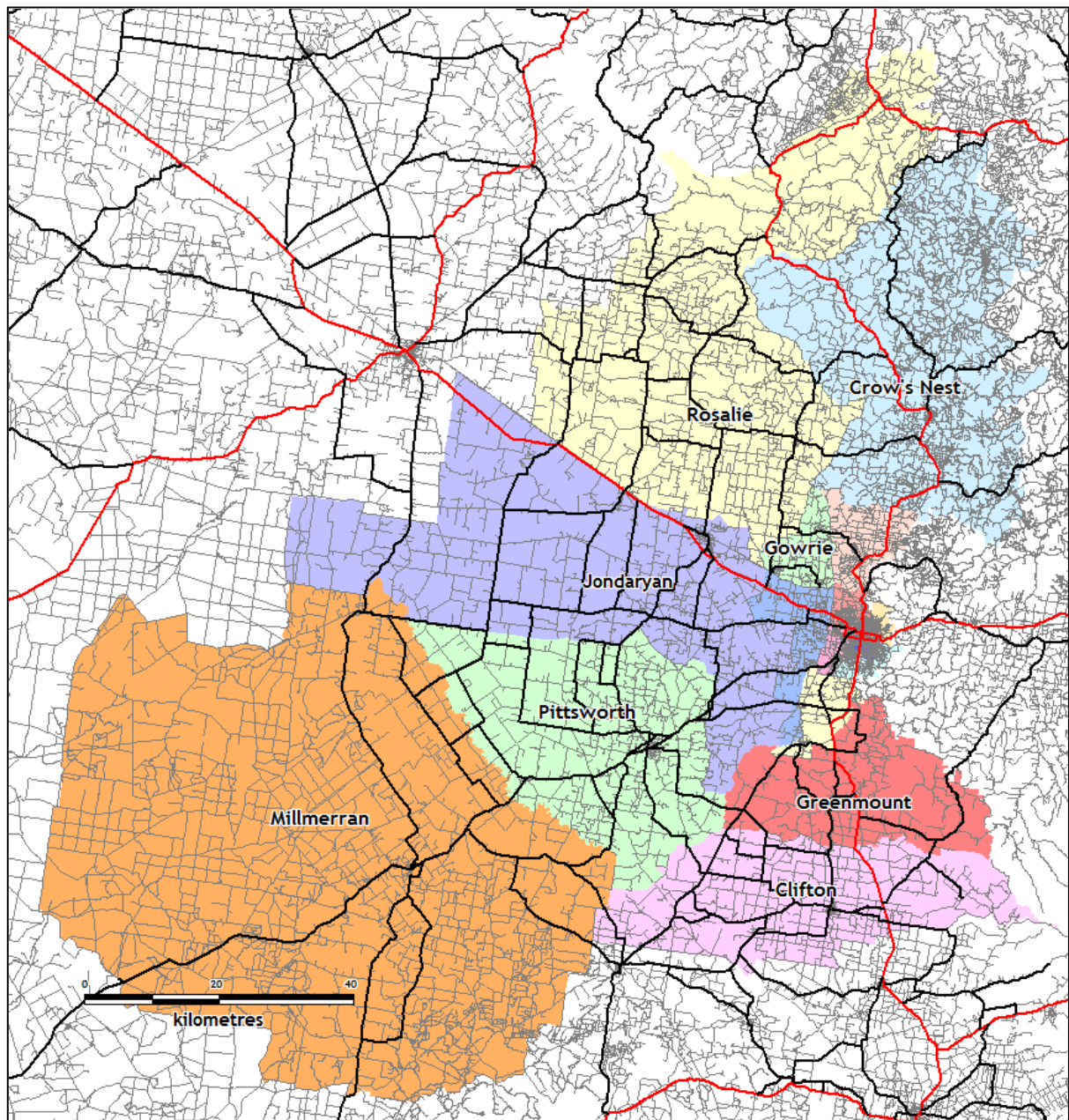
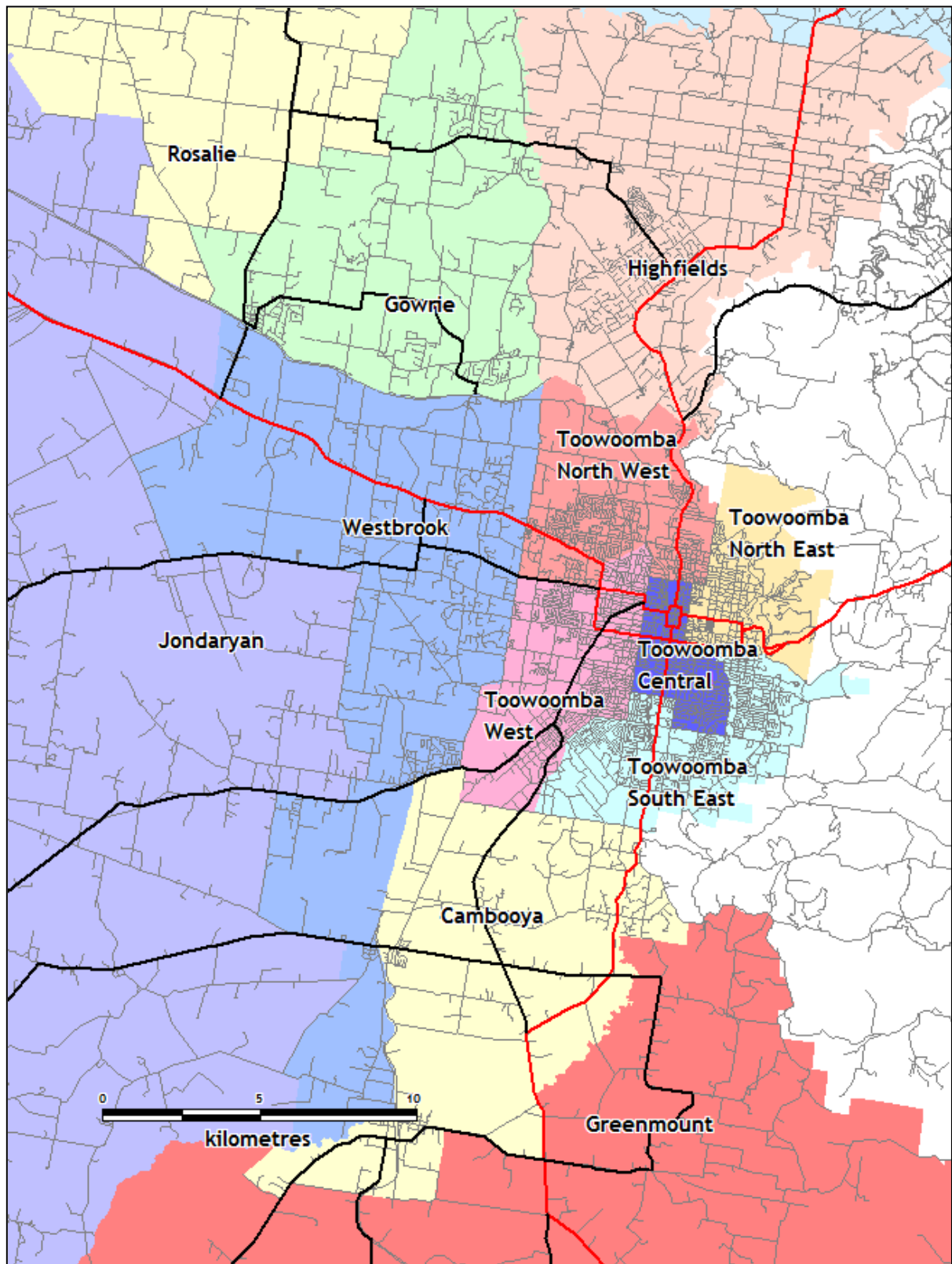


Figure 4.2: Catchment Definition, Toowoomba City Inset



4.2 Socio Economic Profile of the Toowoomba Region

Table 4.2 below provides a socio-economic profile of the combined Toowoomba City, TSD Balance and Toowoomba Rural catchments as at the 2006 and 2011 Censuses of Population and Housing, benchmarked against Toowoomba Regional Council and Queensland.

Detailed socio-economic profiles for each individual catchment are provided in Appendix B.

A number of key points can be drawn from the Toowoomba regional profile including:

- In 2011, the population of Toowoomba Regional Council was approximately 149,212 persons, comprising:
 - 92,206 persons in Toowoomba City;
 - 28,607 persons in TSD Balance; and
 - 28,377 persons in Toowoomba Rural;
- TSD Balance recorded the highest average annual population growth between 2006 and 2011 at 3.8% per annum;
- The average age of residents was 38.3 years in Toowoomba City, 35.2 years in TSD Balance and 40.2 years in Toowoomba Rural, compared with 38.1 years in Toowoomba Regional Council and 38.0 years in Queensland. Toowoomba City recorded a higher proportion of residents aged 15 to 34 years and 65 years and over than Toowoomba Regional Council and Queensland. TSD Balance recorded the highest incidence of persons aged 0-14 years;
- Toowoomba City is characterised by a high incidence of lone person households that are renting;
- TSD Balance is characterised by couple families with children that have a mortgage;
- Toowoomba Rural is characterised by couple families with or without children that either fully own their home.
- The incidence of couple families with children was significantly higher in TSD Balance than Toowoomba Regional Council and Queensland);
- On average, incomes were higher in TSD Balance than Toowoomba City, Toowoomba Rural, and Queensland;
- Toowoomba Rural also recorded average housing loan repayments above Toowoomba City and TSD Balance, but below the state average;
- Rents were higher in TSD Balance than Toowoomba City and Toowoomba Rural, and similar to the state average;
- Unemployment was higher in Toowoomba City than TSD Balance and Toowoomba Rural, but lower than the Queensland average;
- Toowoomba City recorded a significantly higher proportion of persons employed in the education and training, and health care and social assistance industries than Toowoomba Rural, Toowoomba Regional Council and Queensland; and

- Toowoomba Rural recorded a significantly higher proportion of persons employed in the agriculture, forestry and fishing industry and to a lesser extent the manufacturing industry than Toowoomba City, TSD Balance, Toowoomba Regional Council and Queensland.

Table 4.2: Socio Economic Profile, Toowoomba City, TSD Balance, Toowoomba Rural, Toowoomba Regional Council and Queensland, 2006 and 2011 Censuses

	Toowoomba City		TSD Balance		Toowoomba Rural		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Population	89,792	92,206	23,779	28,607	27,448	28,377	141,021	149,212	3,973,958	4,392,097
Ave. Annual Population Growth	-	0.5%	-	3.8%	-	0.7%	-	1.1%	-	2.0%
Age Distribution										
0-14 years	20.6%	20.5%	27.0%	26.1%	23.4%	21.8%	22.2%	21.8%	20.4%	20.0%
15-24 years	16.6%	14.8%	12.5%	12.4%	10.7%	10.9%	14.7%	13.6%	13.6%	13.4%
25-34 years	12.5%	13.2%	11.3%	9.8%	9.8%	9.1%	11.8%	11.8%	13.3%	13.4%
35-44 years	12.4%	12.2%	16.5%	15.4%	14.0%	12.5%	13.4%	12.8%	14.6%	14.2%
45-54 years	12.4%	12.2%	14.8%	15.0%	14.4%	14.2%	13.2%	13.1%	13.7%	13.6%
55-64 years	10.2%	10.8%	10.2%	11.3%	13.2%	13.7%	10.8%	11.5%	11.4%	11.7%
65 years and over	15.3%	16.3%	7.7%	10.1%	14.6%	17.8%	13.8%	15.4%	13.0%	13.7%
Average age (years)	37.6	38.3	33.6	35.2	38.5	40.2	37.1	38.1	37.6	38.0
Household Type (% of families)										
Couple families with children	26.3%	24.7%	49.2%	45.7%	32.5%	28.6%	30.8%	29.0%	29.4%	29.5%
Couple families without children	25.8%	25.6%	30.5%	32.2%	32.3%	32.5%	27.8%	28.1%	26.0%	26.6%
Single parent family	11.5%	11.8%	6.8%	7.1%	9.0%	8.9%	10.3%	10.5%	10.5%	10.7%
Lone person	26.9%	28.9%	9.7%	10.8%	20.0%	22.0%	23.1%	24.6%	21.0%	21.4%
Average household size	2.6	2.5	3.0	3.0	2.7	2.6	2.7	2.6	2.6	2.7
Household Finances										
% of households fully owning home	32.1%	29.7%	32.3%	33.3%	42.2%	39.4%	34.3%	32.2%	30.4%	28.4%
% of households purchasing home	28.2%	28.4%	49.6%	50.5%	28.0%	28.3%	31.5%	32.0%	31.4%	32.6%
% of households renting	33.3%	35.5%	10.6%	12.8%	24.2%	25.2%	28.3%	29.7%	30.0%	32.0%
Average weekly family income	\$874	\$1,046	\$1,368	\$1,614	\$865	\$1,022	\$883	\$1,067	\$1,029	\$1,277
Average monthly housing loan repayment	\$1,230	\$1,644	\$1,362	\$1,830	\$1,143	\$1,495	\$1,249	\$1,671	\$1,466	\$2,020
Average weekly rent payment	\$180	\$235	\$206	\$290	\$125	\$181	\$172	\$230	\$219	\$300
Labour Market (15-64 population)										
Full-time employment (% labour force)	61.0%	60.1%	63.7%	61.5%	65.6%	63.1%	62.4%	60.9%	61.8%	60.4%
Part-time employment (% labour force)	28.6%	28.6%	28.2%	29.8%	24.4%	26.6%	27.7%	28.5%	27.3%	27.6%
Total employment (% labour force)	94.8%	94.3%	97.4%	96.6%	95.6%	95.6%	95.4%	95.0%	95.2%	93.8%
Unemployment rate (% labour force)	5.2%	5.7%	2.6%	3.4%	4.4%	4.4%	4.6%	5.0%	4.8%	6.2%
Participation rate (% of population 15-64 years)	71.2%	71.9%	76.1%	78.6%	71.8%	70.4%	72.2%	73.0%	71.3%	72.7%

	Toowoomba City		TSD Balance		Toowoomba Rural		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Qualifications										
% of persons with a post-school qualification	36.6%	36.0%	40.9%	46.3%	29.0%	33.3%	35.5%	40.7%	37.5%	43.3%
% of persons with Bachelor or higher	10.5%	13.1%	12.9%	14.4%	7.1%	8.1%	11.9%	13.9%	13.1%	15.9%
% of persons with Diploma	5.6%	6.3%	7.4%	8.5%	5.4%	6.1%	6.3%	7.0%	6.6%	7.6%
% of persons with Certificate	20.5%	16.7%	20.6%	23.4%	16.5%	19.1%	17.3%	19.7%	17.8%	19.8%
Occupation										
Upper White Collar										
Managers	9.8%	9.5%	12.1%	12.3%	25.6%	22.9%	13.3%	12.6%	12.4%	12.1%
Professionals	18.2%	20.2%	16.8%	17.2%	9.4%	10.3%	16.3%	17.7%	17.2%	19.0%
<i>Subtotal</i>	28.1%	29.7%	28.9%	29.6%	35.0%	33.2%	29.6%	30.3%	29.6%	31.1%
Lower White Collar										
Community & Personal Service Workers	9.7%	10.9%	8.4%	9.5%	6.9%	7.4%	8.9%	10.0%	9.1%	9.9%
Clerical and Admin Workers	14.4%	14.2%	15.3%	16.0%	9.4%	10.3%	13.6%	13.9%	14.8%	14.7%
Sales Workers	11.2%	10.3%	10.0%	9.5%	6.1%	6.4%	10.0%	9.4%	10.3%	9.8%
<i>Subtotal</i>	35.3%	35.4%	33.8%	35.0%	22.3%	24.2%	32.5%	33.3%	34.2%	34.4%
Upper Blue Collar										
Technicians & Trades Workers	15.4%	14.9%	17.3%	17.1%	13.5%	14.4%	15.4%	15.3%	15.3%	14.9%
<i>Subtotal</i>	15.4%	14.9%	17.3%	17.1%	13.5%	14.4%	15.4%	15.3%	15.3%	14.9%
Lower Blue Collar										
Machinery Operators & Drivers	6.0%	6.0%	7.0%	7.3%	9.0%	9.7%	6.7%	6.9%	7.2%	7.3%
Labourers	13.8%	12.4%	11.7%	9.5%	18.4%	16.8%	14.3%	12.6%	11.9%	10.5%
<i>Subtotal</i>	19.8%	18.4%	18.6%	16.9%	27.4%	26.5%	21.0%	19.6%	19.1%	17.8%
Employment by Industry (% of employees)										
Agriculture, forestry & fishing	2.2%	1.9%	3.9%	3.2%	26.1%	24.0%	7.2%	6.2%	3.4%	2.8%
Mining	0.5%	1.1%	0.8%	2.2%	1.1%	2.3%	0.6%	1.6%	1.7%	2.6%
Manufacturing	11.6%	9.1%	11.8%	9.1%	12.6%	10.7%	11.8%	9.4%	9.9%	8.4%
Electricity, gas, water & waste services	0.8%	0.9%	1.0%	1.3%	1.3%	1.4%	1.0%	1.1%	1.0%	1.2%
Construction	7.0%	7.3%	9.5%	9.6%	6.1%	6.6%	7.3%	7.7%	9.0%	9.0%
Wholesale trade	3.7%	3.8%	4.0%	4.0%	3.6%	3.1%	3.8%	3.7%	3.9%	3.6%
Retail trade	12.7%	11.7%	11.8%	11.2%	8.5%	8.3%	11.7%	11.0%	11.6%	10.6%
Accommodation & food services	6.2%	6.7%	4.4%	4.9%	3.3%	3.7%	5.3%	5.8%	7.0%	6.9%
Transport, postal & warehousing	4.0%	4.2%	5.2%	5.0%	5.0%	5.6%	4.4%	4.7%	5.1%	5.2%
Information media & telecommunications	1.3%	1.2%	0.9%	0.9%	0.5%	0.3%	1.1%	1.0%	1.4%	1.2%

	Toowoomba City		TSD Balance		Toowoomba Rural		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Financial & insurance services	3.6%	3.4%	3.2%	2.7%	1.1%	1.1%	3.0%	2.8%	2.9%	2.7%
Rental, hiring & real estate services	1.6%	1.4%	1.6%	1.4%	0.7%	0.8%	1.5%	1.3%	2.1%	1.8%
Professional, scientific & technical services	4.1%	4.7%	3.9%	4.7%	2.3%	2.9%	3.7%	4.4%	5.6%	6.5%
Administrative & support services	2.2%	2.5%	1.9%	2.3%	1.5%	1.5%	2.0%	2.2%	3.0%	3.2%
Public administration & safety	6.9%	6.5%	8.6%	8.2%	5.8%	5.4%	7.0%	6.6%	6.7%	6.7%
Education & training	10.7%	11.1%	9.5%	9.6%	6.4%	6.7%	9.7%	10.0%	7.6%	7.9%
Health care & social assistance	13.5%	15.5%	11.2%	12.8%	7.9%	9.1%	12.0%	13.8%	10.2%	11.9%
Arts & recreation services	1.0%	1.0%	0.7%	0.8%	0.5%	0.6%	0.9%	0.9%	1.4%	1.4%
Other services	4.3%	4.1%	4.1%	4.4%	2.9%	3.1%	4.0%	3.9%	3.7%	3.9%

Source: Australian Bureau of Statistics (2012a)

4.3 Population and Household Projections

Within Toowoomba Regional Council, the rate of population growth and household formation is anticipated to be highest in:

- Highfields (average annual population growth of 3.9% between 2013 and 2031);
- Westbrook (average annual population growth of 3.9% between 2013 and 2031);
- Cambooya (average annual population growth of 3.8% between 2013 and 2031); and
- Crows Nest (average annual population growth of 3.6% between 2013 and 2031).

Within Toowoomba City, population growth is anticipated to be highest in Toowoomba South-East and Toowoomba West catchments.

Table 4.3: Projected Population and Households by Catchment, 2013-2031

	2013	2016	2021	2026	2031	Ave Ann Growth, 2013-31
Population						
Toowoomba Central	14,619	14,812	15,036	15,355	15,561	0.3%
Toowoomba North-East	11,359	11,545	11,747	11,747	11,846	0.2%
Toowoomba North-West	20,747	21,597	23,371	23,629	24,068	0.8%
Toowoomba South-East	30,230	31,385	34,343	39,788	46,595	2.4%
Toowoomba West	25,582	26,624	28,835	31,659	33,757	1.6%
Highfields	13,131	14,894	17,774	21,555	25,972	3.9%
Gowrie	6,120	6,778	7,887	9,080	10,285	2.9%
Westbrook	10,009	11,426	14,134	17,004	20,013	3.9%
Cambooya	5,679	6,534	7,879	9,463	11,150	3.8%
Crows Nest	5,044	5,670	6,671	8,045	9,542	3.6%
Rosalie	5,151	5,389	5,737	6,124	6,532	1.3%
Jondaryan	7,347	7,667	8,233	8,859	9,448	1.4%
Greenmount	2,495	2,742	3,076	3,494	3,888	2.5%
Pittsworth	5,646	6,003	6,554	7,124	7,733	1.8%
Millmerran	3,539	3,715	3,946	4,176	4,406	1.2%
Clifton	3,208	3,271	3,369	3,468	3,544	0.6%
Toowoomba City	102,537	105,963	113,332	122,178	131,827	1.4%
TSD Balance	34,939	39,632	47,674	57,102	67,420	3.7%
Toowoomba Rural	32,430	34,457	37,586	41,290	45,093	1.8%
Households						
Toowoomba Central	6,041	6,163	6,329	6,540	6,707	0.6%
Toowoomba North-East	4,300	4,407	4,548	4,613	4,720	0.5%
Toowoomba North-West	8,074	8,482	9,320	9,571	9,905	1.1%
Toowoomba South-East	10,836	11,331	12,550	14,718	17,451	2.7%
Toowoomba West	10,141	10,647	11,704	13,045	14,124	1.9%
Highfields	4,270	4,887	5,921	7,292	8,925	4.2%
Gowrie	1,984	2,209	2,592	3,010	3,440	3.1%
Westbrook	3,098	3,555	4,436	5,385	6,394	4.1%
Cambooya	1,776	2,054	2,498	3,026	3,597	4.0%
Crows Nest	1,900	2,151	2,562	3,128	3,757	3.9%
Rosalie	1,903	2,002	2,150	2,316	2,493	1.5%
Jondaryan	2,527	2,652	2,875	3,123	3,362	1.6%
Greenmount	893	988	1,121	1,288	1,451	2.7%
Pittsworth	1,966	2,103	2,319	2,546	2,792	2.0%
Millmerran	1,295	1,368	1,468	1,571	1,675	1.4%
Clifton	1,209	1,242	1,296	1,352	1,401	0.8%
Toowoomba City	39,391	41,030	44,451	48,488	52,907	1.7%
TSD Balance	11,128	12,704	15,447	18,713	22,356	4.0%
Toowoomba Rural	11,692	12,505	13,791	15,324	16,931	2.1%

	2013	2016	2021	2026	2031	Ave Ann Growth, 2013-31
Average Household Size						
Toowoomba Central	2.42	2.40	2.38	2.35	2.32	-0.2%
Toowoomba North-East	2.64	2.62	2.58	2.55	2.51	-0.3%
Toowoomba North-West	2.57	2.55	2.51	2.47	2.43	-0.3%
Toowoomba South-East	2.79	2.77	2.74	2.70	2.67	-0.2%
Toowoomba West	2.52	2.50	2.46	2.43	2.39	-0.3%
Highfields	3.08	3.05	3.00	2.96	2.91	-0.3%
Gowrie	3.08	3.07	3.04	3.02	2.99	-0.2%
Westbrook	3.23	3.21	3.19	3.16	3.13	-0.2%
Cambooya	3.20	3.18	3.15	3.13	3.1	-0.2%
Crows Nest	2.66	2.64	2.60	2.57	2.54	-0.2%
Rosalie	2.71	2.69	2.67	2.64	2.62	-0.2%
Jondaryan	2.91	2.89	2.86	2.84	2.81	-0.2%
Greenmount	2.79	2.78	2.74	2.71	2.68	-0.2%
Pittsworth	2.87	2.85	2.83	2.80	2.77	-0.2%
Millmerran	2.73	2.72	2.69	2.66	2.63	-0.2%
Clifton	2.65	2.63	2.60	2.56	2.53	-0.3%
Toowoomba City	2.60	2.58	2.55	2.52	2.49	-0.2%
TSD Balance	3.14	3.12	3.09	3.05	3.02	-0.2%
Toowoomba Rural	2.77	2.76	2.73	2.69	2.66	-0.2%

Source: Office of Economic and Statistical Research (2011)

4.4 Available Retail Expenditure within Catchments

Retail expenditure analysis seeks to identify retail expenditure patterns for households in identified catchment areas, which can then be extrapolated by projected household formation over time to generate a total future available retail expenditure estimate for identified trade area/s.

A number of retail categories are identified, these being:

- Grocery and Specialty:
 - Groceries and take home food;
 - Dining & take-away food (including on-premise liquor);
 - Clothing, footwear and apparel;
 - Personal and other goods;
 - Takeaway liquor;
- Bulky goods:
 - Core bulky goods ⁴;
 - Ancillary bulky goods ⁵; and
 - Hardware.

⁴ Core bulky goods include furniture and floor coverings, household appliances and audio-visual equipment and parts.

⁵ Ancillary bulky goods include blankets, household linen and household furnishings, glassware, tableware, cutlery and household utensils, home computer equipment, camping equipment and motor vehicle parts and accessories purchased separately

Retail expenditure data for regional Queensland⁶ is taken from the ABS Household Expenditure Survey 2009-10 (Cat No. 6535.0.55.001) and assigned to the above retail expenditure categories and then adjusted for sub-regional variations based on income quintiles. All estimates are expressed in 2013 dollars.

Table 4.4 below summarises the estimated weekly retail expenditure patterns of households within the trade areas between 2013 and 2031 (the detailed weekly retail expenditure by category table can be found in Appendix C).

Table 4.4: Weekly Retail Expenditure Patterns of Catchment Area Households, 2013-2031 (2013 dollars)

	2013	2016	2021	2026	2031
Toowoomba Central					
Grocery & Specialty	\$351.91	\$357.21	\$366.23	\$375.48	\$384.96
Bulky Goods	\$139.03	\$141.13	\$144.69	\$148.35	\$152.09
Total	\$490.94	\$498.34	\$510.93	\$523.83	\$537.06
Toowoomba North-East					
Grocery & Specialty	\$430.56	\$437.05	\$448.08	\$459.40	\$471.00
Bulky Goods	\$167.22	\$169.75	\$174.03	\$178.43	\$182.93
Total	\$597.78	\$606.79	\$622.11	\$637.82	\$653.93
Toowoomba North-West					
Grocery & Specialty	\$347.82	\$353.07	\$361.98	\$371.12	\$380.49
Bulky Goods	\$135.77	\$137.82	\$141.30	\$144.87	\$148.53
Total	\$483.60	\$490.89	\$503.28	\$515.99	\$529.02
Toowoomba South-East					
Grocery & Specialty	\$403.12	\$409.20	\$419.53	\$430.13	\$440.99
Bulky Goods	\$159.53	\$161.94	\$166.03	\$170.22	\$174.52
Total	\$562.66	\$571.14	\$585.56	\$600.35	\$615.51
Toowoomba West					
Grocery & Specialty	\$348.99	\$354.25	\$363.19	\$372.36	\$381.77
Bulky Goods	\$136.70	\$138.76	\$142.27	\$145.86	\$149.54
Total	\$485.69	\$493.01	\$505.46	\$518.22	\$531.31
Highfields					
Grocery & Specialty	\$458.32	\$465.23	\$476.98	\$489.02	\$501.37
Bulky Goods	\$175.01	\$177.65	\$182.13	\$186.73	\$191.45
Total	\$633.33	\$642.88	\$659.11	\$675.75	\$692.82
Gowrie					
Grocery & Specialty	\$403.50	\$409.58	\$419.92	\$430.53	\$441.40
Bulky Goods	\$159.64	\$162.05	\$166.14	\$170.33	\$174.63
Total	\$563.14	\$571.63	\$586.06	\$600.86	\$616.03
Westbrook					
Grocery & Specialty	\$464.12	\$471.12	\$483.02	\$495.21	\$507.72
Bulky Goods	\$176.64	\$179.30	\$183.83	\$188.47	\$193.23
Total	\$640.76	\$650.42	\$666.84	\$683.68	\$700.95
Cambooya					
Grocery & Specialty	\$421.53	\$427.88	\$438.69	\$449.76	\$461.12

⁶ Regional Queensland is Queensland less the Brisbane Statistical Division

	2013	2016	2021	2026	2031
Bulky Goods	\$164.69	\$167.18	\$171.40	\$175.73	\$180.16
Total	\$586.22	\$595.06	\$610.08	\$625.49	\$641.28
Crows Nest					
Grocery & Specialty	\$350.58	\$355.86	\$364.85	\$374.06	\$383.51
Bulky Goods	\$137.97	\$140.05	\$143.59	\$147.21	\$150.93
Total	\$488.55	\$495.92	\$508.44	\$521.28	\$534.44
Rosalie					
Grocery & Specialty	\$351.64	\$356.94	\$365.96	\$375.20	\$384.67
Bulky Goods	\$138.82	\$140.91	\$144.47	\$148.12	\$151.86
Total	\$490.46	\$497.86	\$510.43	\$523.32	\$536.53
Jondaryan					
Grocery & Specialty	\$362.53	\$368.00	\$377.29	\$386.81	\$396.58
Bulky Goods	\$147.51	\$149.74	\$153.52	\$157.39	\$161.37
Total	\$510.04	\$517.73	\$530.80	\$544.21	\$557.95
Greenmount					
Grocery & Specialty	\$388.86	\$394.72	\$404.69	\$414.91	\$425.39
Bulky Goods	\$155.54	\$157.88	\$161.87	\$165.95	\$170.14
Total	\$544.40	\$552.60	\$566.56	\$580.86	\$595.53
Pittsworth					
Grocery & Specialty	\$361.42	\$366.87	\$376.14	\$385.63	\$395.37
Bulky Goods	\$146.63	\$148.84	\$152.60	\$156.45	\$160.40
Total	\$508.05	\$515.71	\$528.73	\$542.09	\$555.77
Millmerran					
Grocery & Specialty	\$358.15	\$363.55	\$372.73	\$382.14	\$391.79
Bulky Goods	\$144.02	\$146.19	\$149.88	\$153.66	\$157.55
Total	\$502.17	\$509.74	\$522.61	\$535.81	\$549.34
Clifton					
Grocery & Specialty	\$344.41	\$349.60	\$358.43	\$367.48	\$376.76
Bulky Goods	\$133.05	\$135.05	\$138.46	\$141.96	\$145.55
Total	\$477.46	\$484.66	\$496.89	\$509.44	\$522.31

Source: Derived from Australian Bureau of Statistics (2011b) and Australian Bureau of Statistics (2012a)

Annual available retail expenditure in the combined retail and commercial catchment areas is anticipated to increase from \$1,553.79 million in 2013 to \$2,429.28 million in 2031 or by 2.6% per annum.

The catchments anticipated to record the fastest growth in annual available retail expenditure are:

- Highfields: 4.7% per annum between 2013 and 2031;
- Westbrook: 4.6% per annum between 2013 and 2031;
- Cambooya: 4.5% per annum between 2013 and 2031;
- Crows Nest: 4.4% per annum between 2013 and 2031; and
- Gowrie: 3.6% per annum between 2013 and 2031.

The TSD Balance catchment is forecast to account for an increasing share of total annual available retail expenditure within Toowoomba Regional Council, increasing from 23.2% of total available retail expenditure in 2013 to 32.3% of total available retail expenditure in 2031.

This highlights that retail expenditure growth within the TSD Balance catchments will have a significant impact on the future provision of additional retail floor space both locally and within higher order centres in Toowoomba City.

Table 4.5 below summarises the annual available retail expenditure within the catchment areas (a detailed table can be found in Appendix C of this report).

Table 4.5: Annual Available Retail Expenditure within Catchments, 2013-2031 (\$M) (2013 dollars)

	2013	2016	2021	2026	2031
Toowoomba Central					
Grocery & Specialty	\$110.54	\$114.48	\$120.54	\$127.70	\$134.27
Bulky Goods	\$43.67	\$45.23	\$47.62	\$50.45	\$53.05
Total	\$154.21	\$159.70	\$168.16	\$178.15	\$187.32
Toowoomba North-East					
Grocery & Specialty	\$96.28	\$100.16	\$105.96	\$110.20	\$115.59
Bulky Goods	\$37.39	\$38.90	\$41.16	\$42.80	\$44.89
Total	\$133.67	\$139.06	\$147.12	\$153.00	\$160.48
Toowoomba North-West					
Grocery & Specialty	\$146.03	\$155.72	\$175.44	\$184.71	\$195.97
Bulky Goods	\$57.00	\$60.78	\$68.48	\$72.10	\$76.50
Total	\$203.04	\$216.50	\$243.92	\$256.81	\$272.46
Toowoomba South-East					
Grocery & Specialty	\$90.15	\$93.78	\$99.21	\$103.18	\$108.23
Bulky Goods	\$35.67	\$37.11	\$39.26	\$40.83	\$42.83
Total	\$125.82	\$130.89	\$138.48	\$144.01	\$151.05
Toowoomba West					
Grocery & Specialty	\$184.03	\$196.13	\$221.04	\$252.59	\$280.39
Bulky Goods	\$72.09	\$76.83	\$86.58	\$98.94	\$109.83
Total	\$256.11	\$272.96	\$307.62	\$351.54	\$390.22
Highfields					
Grocery & Specialty	\$101.76	\$118.22	\$146.86	\$185.43	\$232.69
Bulky Goods	\$38.86	\$45.14	\$56.08	\$70.81	\$88.85
Total	\$140.62	\$163.36	\$202.93	\$256.24	\$321.54
Gowrie					
Grocery & Specialty	\$41.63	\$47.04	\$56.60	\$67.39	\$78.95
Bulky Goods	\$16.47	\$18.61	\$22.39	\$26.66	\$31.24
Total	\$58.10	\$65.65	\$79.00	\$94.06	\$110.19
Westbrook					
Grocery & Specialty	\$74.77	\$87.10	\$111.43	\$138.66	\$168.81
Bulky Goods	\$28.46	\$33.15	\$42.41	\$52.77	\$64.25
Total	\$103.23	\$120.25	\$153.84	\$191.43	\$233.05
Cambooya					
Grocery & Specialty	\$38.93	\$45.70	\$56.98	\$70.77	\$86.24
Bulky Goods	\$15.21	\$17.85	\$22.26	\$27.65	\$33.70
Total	\$54.14	\$63.55	\$79.25	\$98.43	\$119.94
Crows Nest					

	2013	2016	2021	2026	2031
Grocery & Specialty	\$34.63	\$39.80	\$48.60	\$60.84	\$74.92
Bulky Goods	\$13.63	\$15.66	\$19.13	\$23.94	\$29.48
Total	\$48.26	\$55.47	\$67.73	\$84.79	\$104.40
Rosalie					
Grocery & Specialty	\$34.80	\$37.15	\$40.92	\$45.19	\$49.87
Bulky Goods	\$13.74	\$14.67	\$16.15	\$17.84	\$19.69
Total	\$48.53	\$51.82	\$57.07	\$63.03	\$69.56
Jondaryan					
Grocery & Specialty	\$47.64	\$50.75	\$56.40	\$62.81	\$69.34
Bulky Goods	\$19.38	\$20.65	\$22.95	\$25.56	\$28.21
Total	\$67.03	\$71.40	\$79.35	\$88.37	\$97.55
Greenmount					
Grocery & Specialty	\$18.05	\$20.28	\$23.59	\$27.80	\$32.09
Bulky Goods	\$7.22	\$8.11	\$9.44	\$11.12	\$12.84
Total	\$25.27	\$28.39	\$33.03	\$38.92	\$44.93
Pittsworth					
Grocery & Specialty	\$36.95	\$40.12	\$45.35	\$51.05	\$57.40
Bulky Goods	\$14.99	\$16.28	\$18.40	\$20.71	\$23.29
Total	\$51.94	\$56.39	\$63.75	\$71.76	\$80.68
Millmerran					
Grocery & Specialty	\$24.11	\$25.85	\$28.46	\$31.21	\$34.13
Bulky Goods	\$9.69	\$10.40	\$11.44	\$12.55	\$13.72
Total	\$33.80	\$36.25	\$39.90	\$43.76	\$47.86
Clifton					
Grocery & Specialty	\$21.65	\$22.58	\$24.16	\$25.84	\$27.44
Bulky Goods	\$8.36	\$8.72	\$9.33	\$9.98	\$10.60
Total	\$30.01	\$31.31	\$33.50	\$35.83	\$38.05
Toowoomba City					
Grocery & Specialty	\$627.03	\$660.27	\$722.19	\$778.37	\$834.44
Bulky Goods	\$245.83	\$258.85	\$283.11	\$305.13	\$327.10
Total	\$872.86	\$919.12	\$1,005.30	\$1,083.50	\$1,161.54
TSD Balance					
Grocery & Specialty	\$257.09	\$298.05	\$371.87	\$462.26	\$566.69
Bulky Goods	\$98.99	\$114.75	\$143.14	\$177.89	\$218.03
Total	\$356.08	\$412.81	\$515.01	\$640.15	\$784.72
Toowoomba Rural					
Grocery & Specialty	\$217.83	\$236.53	\$267.48	\$304.74	\$345.19
Bulky Goods	\$87.02	\$94.49	\$106.84	\$121.70	\$137.83
Total	\$304.85	\$331.02	\$374.32	\$426.45	\$483.02
Toowoomba Regional Council					
Grocery & Specialty	\$1,101.94	\$1,194.85	\$1,361.54	\$1,545.37	\$1,746.32
Bulky Goods	\$431.84	\$468.09	\$533.09	\$604.72	\$682.96
Total	\$1,533.79	\$1,662.95	\$1,894.63	\$2,150.09	\$2,429.28

Source: Derived from Table 7.1 and Table 8.1

4.5 Sales Productivity and Supportable Floor Space

Sales productivity rates are used as a means of rationing floor space within and across catchments. The sales productivity rates adopted allow for reasonable levels of commercial

performance balanced against the need to ensure sufficient supply to meet community expectations of choice and convenience. Hence, sales productivity rates utilised in strategic planning studies are typically lower than average productivity rates across the retail sector⁷.

Table 4.6 below shows the assumed sales productivity rates within Toowoomba Regional Council. The weighted average of these sales productivity rates is generally consistent with the aggregated sales productivity rates adopted in the 2009 Activity Centres Study.

Table 4.6: Assumed Sales Productivities (\$/m²), Toowoomba Regional Council

	Sales Productivity
Groceries & take home food	\$8,000
Dining & take-away food (incl. on-premise liquor)	\$4,500
Clothing, footwear & apparel	\$4,000
Personal & other goods	\$4,000
Core bulky goods	\$3,500
Ancillary bulky goods	\$4,000
Hardware	\$2,500
Takeaway liquor	\$5,500

Source: Economic Associates estimates

To determine the supportable floor space generated by each catchment, the assumed sales productivities (Table 4.6) have been applied to annual available expenditure estimates for each catchment (Table 4.5).

Supportable retail floor space estimates provide an indication of the level of retail floor space demand generated by each catchment. However, supportable floor space demand generated by a catchment is typically satisfied through floor space provision both within and outside the catchment. For example, it is anticipated that retail floor space demand generated by the Toowoomba Rural catchments will ultimately be met by centres within the catchment; within higher order centres in Toowoomba City (e.g. Toowoomba CBD and Kearney Springs) and outside of Toowoomba Regional Council (e.g. internet retailers, Brisbane and Gold Coast).

The supportable retail floor space in Toowoomba Regional Council is projected to increase from 320,019m² in 2013 to 506,271m² in 2031, representing an increase of 186,253m².

Within Toowoomba City, supportable retail floor space is anticipated to increase by 60,734m² between 2013 and 2031, comprising:

- Toowoomba Central: additional 6,966m² of supportable floor space between 2013 and 2031
- Toowoomba North-East: additional 5,693m² of supportable floor space between 2013 and 2031;
- Toowoomba North-West: additional 14,562m² of supportable floor space between 2013 and 2031;
- Toowoomba South-East: additional 5,357m² of supportable floor space between 2013 and 2031; and
- Toowoomba West: additional 28,156m² of supportable floor space between 2013 and 2031.

⁷ Lower sales productivity rates result in a higher level of supportable floor space.

Westbrook and Highfields are also anticipated to record significant increases in supportable retail floor space between 2013 and 2031, as a result of significant population growth and household formation within these catchments.

Table 4.7 below provides a summary of supportable retail floor space by catchment between 2013 and 2031.

Table 4.7: Supportable Retail Floor Space (sqm), Toowoomba Regional Council, 2013-2031

	2013	2016	2021	2026	2031	Change, 2013-2031
Toowoomba Central						
Grocery & Specialty	19,968	20,679	21,773	23,067	24,254	4,287
Bulky Goods	12,480	12,925	13,609	14,417	15,159	2,679
Total	32,448	33,603	35,382	37,484	39,413	6,966
Toowoomba North-East						
Grocery & Specialty	17,699	18,412	19,479	20,257	21,248	3,550
Bulky Goods	10,686	11,117	11,761	12,231	12,829	2,143
Total	28,385	29,529	31,240	32,488	34,078	5,693
Toowoomba North-West						
Grocery & Specialty	26,283	28,026	31,575	33,244	35,270	8,987
Bulky Goods	16,305	17,386	19,588	20,623	21,880	5,575
Total	42,588	45,412	51,162	53,866	57,150	14,562
Toowoomba South-East						
Grocery & Specialty	16,526	17,192	18,188	18,915	19,840	3,314
Bulky Goods	10,185	10,596	11,210	11,658	12,228	2,043
Total	26,711	27,788	29,398	30,572	32,068	5,357
Toowoomba West						
Grocery & Specialty	33,156	35,337	39,825	45,510	50,518	17,362
Bulky Goods	20,613	21,969	24,759	28,293	31,407	10,794
Total	53,769	57,305	64,583	73,803	81,925	28,156
Highfields						
Grocery & Specialty	18,752	21,785	27,062	34,170	42,878	24,126
Bulky Goods	11,113	12,911	16,038	20,251	25,412	14,299
Total	29,865	34,696	43,100	54,421	68,290	38,425
Gowrie						
Grocery & Specialty	7,631	8,623	10,377	12,355	14,474	6,843
Bulky Goods	4,702	5,313	6,394	7,612	8,918	4,216
Total	12,333	13,937	16,770	19,967	23,393	11,059
Westbrook						
Grocery & Specialty	13,785	16,057	20,543	25,563	31,122	17,336
Bulky Goods	8,140	9,482	12,131	15,095	18,378	10,237
Total	21,925	25,539	32,674	40,658	49,499	27,574
Cambooya						
Grocery & Specialty	7,150	8,393	10,466	12,999	15,840	8,690
Bulky Goods	4,345	5,101	6,360	7,900	9,626	5,281
Total	11,495	13,494	16,826	20,898	25,467	13,971
Crows Nest						
Grocery & Specialty	6,248	7,181	8,769	10,977	13,517	7,269
Bulky Goods	3,896	4,478	5,468	6,845	8,428	4,532
Total	10,144	11,659	14,237	17,822	21,945	11,801
Rosalie						

	2013	2016	2021	2026	2031	Change, 2013-2031
Grocery & Specialty	6,284	6,709	7,389	8,161	9,006	2,722
Bulky Goods	3,926	4,191	4,616	5,098	5,626	1,701
Total	10,210	10,901	12,005	13,259	14,633	4,423
Jondaryan						
Grocery & Specialty	8,684	9,251	10,280	11,449	12,639	3,955
Bulky Goods	5,528	5,888	6,544	7,288	8,045	2,517
Total	14,212	15,139	16,824	18,737	20,684	6,472
Greenmount						
Grocery & Specialty	3,304	3,712	4,318	5,088	5,874	2,569
Bulky Goods	2,061	2,314	2,693	3,173	3,663	1,602
Total	5,365	6,026	7,011	8,261	9,536	4,171
Pittsworth						
Grocery & Specialty	4,379	4,695	5,168	5,668	6,199	1,820
Bulky Goods	2,767	2,967	3,266	3,582	3,917	1,150
Total	7,145	7,662	8,434	9,250	10,116	2,970
Millmerran						
Grocery & Specialty	4,379	4,695	5,168	5,668	6,199	1,820
Bulky Goods	2,767	2,967	3,266	3,582	3,917	1,150
Total	7,145	7,662	8,434	9,250	10,116	2,970
Clifton						
Grocery & Specialty	3,884	4,052	4,335	4,637	4,924	1,040
Bulky Goods	2,394	2,497	2,672	2,858	3,035	641
Total	6,278	6,549	7,007	7,494	7,959	1,680
Toowoomba City						
Grocery & Specialty	113,631	119,646	130,840	140,992	151,131	37,499
Bulky Goods	70,269	73,992	80,926	87,222	93,504	23,234
Total	183,901	193,638	211,766	228,214	244,634	60,734
TSD Balance						
Grocery & Specialty	47,318	54,859	68,447	85,087	104,314	56,996
Bulky Goods	28,301	32,807	40,923	50,858	62,334	34,034
Total	75,619	87,666	109,371	135,945	166,649	91,030
Toowoomba Rural						
Grocery & Specialty	37,162	40,295	45,428	51,648	58,358	21,196
Bulky Goods	23,337	25,303	28,524	32,424	36,631	13,294
Total	60,499	65,598	73,952	84,073	94,988	34,489
Toowoomba Regional Council						
Grocery & Specialty	198,111	214,800	244,716	277,727	313,803	115,691
Bulky Goods	121,907	132,102	150,373	170,505	192,469	70,561
Total	320,019	346,903	395,089	448,232	506,271	186,253

Note: Estimates are rounded to the nearest 100m².

Source: Economic Associates estimates, derived from Table 4.5 and Table 4.6

4.6 Retail Expenditure Leakage

As outlined above, supportable retail floor space estimates provide an indication of the level of retail floor space demand generated by each catchment. However, supportable floor space demand generated by a catchment is typically satisfied through floor space provision both within

and outside the catchment. This section of the report estimates the extent of demand after consideration of retail expenditure inflows and outflows.

Toowoomba Regional Council captures both inflow expenditure from the broader Darling Downs South West Lockyer Valley region and records retail expenditure outflows (i.e. leakage) to centres such as Brisbane and the Gold Coast and non-centre based retailers.

The following inflows and outflows of retail expenditure are considered in the subsequent analysis:

- Retail expenditure leakage from Toowoomba City to centres such as Brisbane and the Gold Coast;
- Retail expenditure leakage from TSD Balance and Toowoomba Rural catchments:
 - Retail expenditure leakage to Toowoomba City;
 - Retail expenditure leakage to outside of Toowoomba Regional Council (i.e to higher order centres or online retailers); and
- Retail expenditure inflows to Toowoomba City from the Darling Downs/South West and Lockyer Valley region.

Our analysis has assumed that online retailing is not anticipated to have a significant impact on retail floor space demand in Toowoomba Regional Council.

PWC / Frost & Sullivan (2013) highlight that in 2012, online retail sales accounted for 6.3% of all retail sales in Australia, compared to 7.3% of retail sales in the United States and 10.7% of retail sales in the United Kingdom. Over half of all online retail sales in Australia occurred with domestic retailers.

The PWC / Frost & Sullivan report forecasts an increasing proportion of retail sales in Australia will be conducted online, increasing to 9.0% of total sales by 2016. However, the growth in online sales will be partially attributable to traditional bricks and mortar stores in Australia improving their 'multi channel' offer and strengthening their online presence. It is anticipated that in the short to medium term, online retailing will not have a significant impact on traditional retail floor space demand, consistent with the United States and United Kingdom experience, where the 'multi channel' offer is more prevalent.

4.6.1 Leakage from Toowoomba City

As previously noted, the 2009 Activity Centres Study assumed that the level of escape expenditure⁸ from Toowoomba Regional Council was entirely offset by expenditure inflows from leisure and business visitors to the region. This study adopts an alternative approach by recognises that some expenditure generated within the Toowoomba region will escape to other regions (most notably Brisbane).

While it is likely that there is little to no convenience based retail expenditure leakage (i.e. groceries & take home food, dining & take-away food and takeaway liquor) and hardware within Toowoomba City, expenditure leakage is likely to be recorded for comparison based shopping

⁸ Otherwise referred to as retail expenditure leakage

(i.e. clothing, footwear & apparel and personal & other goods) and bulky goods retailing, due to the broader range of goods on offer in locations such as Brisbane and the Gold Coast.

The analysis contained within this report assumes that all convenience based retail and hardware expenditure is retained within Toowoomba City, with 10% of personal & other goods retail and 20% of clothing, footwear & apparel, core bulky goods and ancillary bulky goods retail expenditure occurring outside the Toowoomba Regional Council (i.e. at locations such as Brisbane and the Gold Coast). The level of retail expenditure leakage has been held constant throughout the projection period.

Table 4.8 below summarises the retail expenditure leakage assumptions for Toowoomba City.

Table 4.8: Retail Expenditure Leakage Assumptions, Toowoomba City

Retail Category	Retained within Toowoomba City	Leakage Outside Toowoomba Regional Council
Groceries & take home food	100%	-
Dining & takeaway food (incl. on-premise liquor)	100%	-
Clothing, footwear & apparel	80%	20%
Personal & other goods	90%	10%
Core bulky goods	80%	20%
Ancillary bulky goods	80%	20%
Hardware	100%	-
Takeaway liquor	100%	-

Source: Economic Associates estimates

The level of escape expenditure from Toowoomba City catchments is projected to increase from \$67.95 million in 2013 to \$90.36 million in 2031. The level of escape expenditure is projected to be highest (in dollar terms) within the core bulky goods and ancillary bulky goods categories.

Table 4.9 below provides a summary of the level of retained expenditure and escape expenditure between 2013 and 2031.

Table 4.9: Retail Expenditure Retention and Leakage (\$m), Toowoomba City Catchments, 2013 to 2031

Retail Category	2013	2016	2021	2026	2031
Retained within Toowoomba City					
Groceries & take home food	\$302.68	\$318.81	\$348.94	\$376.31	\$403.57
Dining & takeaway food (incl. on-premise liquor)	\$100.22	\$105.48	\$115.24	\$124.07	\$132.91
Clothing, footwear & apparel	\$57.26	\$60.28	\$65.90	\$70.99	\$76.08
Personal & other goods	\$104.22	\$109.72	\$119.94	\$129.20	\$138.47
Core bulky goods	\$77.96	\$82.10	\$89.80	\$96.79	\$103.77
Ancillary bulky goods	\$90.27	\$95.05	\$103.94	\$112.01	\$120.06
Hardware	\$35.54	\$37.43	\$40.94	\$44.13	\$47.31
Takeaway liquor	\$36.76	\$38.72	\$42.37	\$45.70	\$49.01
Grocery & specialty	\$601.13	\$633.01	\$692.39	\$746.27	\$800.04
Bulky goods	\$203.77	\$214.57	\$234.67	\$252.93	\$271.14
Total	\$804.90	\$847.57	\$927.06	\$999.20	\$1,071.18
Leakage outside Toowoomba Regional Council					
Groceries & take home food	-	-	-	-	-
Dining & takeaway food (incl. on-premise liquor)	-	-	-	-	-
Clothing, footwear & apparel	\$14.31	\$15.07	\$16.47	\$17.75	\$19.02
Personal & other goods	\$11.58	\$12.19	\$13.33	\$14.36	\$15.39
Core bulky goods	\$19.49	\$20.52	\$22.45	\$24.20	\$25.94
Ancillary bulky goods	\$22.57	\$23.76	\$25.98	\$28.00	\$30.02
Hardware	-	-	-	-	-
Takeaway liquor	-	-	-	-	-
Grocery & specialty	\$25.89	\$27.26	\$29.80	\$32.10	\$34.41
Bulky goods	\$42.06	\$44.29	\$48.43	\$52.20	\$55.96
Total	\$67.95	\$71.55	\$78.23	\$84.30	\$90.36

Source: Economic Associates estimates

4.6.2 Leakage from TSD Balance and Toowoomba Rural Catchments

Residents within the TSD balance and rural catchments of Toowoomba Regional Council (i.e. outside Toowoomba City) consider three locations for their retail expenditure:

- Within their catchment;
- Within Toowoomba City; or
- Outside Toowoomba Regional Council.

The rural catchments of Toowoomba Regional Council are reliant on retailers within Toowoomba City for convenience-based retail, comparison-based shopping and bulky goods retailing. It is expected that Toowoomba City with its broader product range and depth across all retail categories, captures a significant level of expenditure leakage from the TSD Balance and rural catchments of Toowoomba Regional Council.

The analysis takes into consideration the existing and proposed retail offering, along with the future settlement pattern within each catchment. It is assumed that retail expenditure leakage within Toowoomba Regional Council remains constant throughout the projection period (2013 to 2031).

The assumed retail expenditure leakage rates for the TSD Balance and rural catchments within Toowoomba Regional Council are shown in Table 4.10 below.

Table 4.10: Range of Retail Expenditure Leakage Assumptions by Catchment, Remainder of Toowoomba Regional Council

	Retained within Catchment	Leakage to Toowoomba City	Leakage outside Toowoomba Regional Council
Groceries & take home food	~60%-80%	~20%-40%	-
Dining & take-away food (incl. on-premise liquor)	~60%-80%	~20%-40%	-
Clothing, footwear & apparel	~20%-30%	~50%-60%	~20%
Personal & other goods	~30%-40%	~50%	~10%-20%
Core bulky goods	~20%-30%	~50%-60%	~20%
Ancillary bulky goods	~20%-30%	~50%-60%	~20%
Hardware	~60%-80%	~20%-40%	-
Takeaway liquor	~70%-80%	~20%-30%	-

Source: Economic Associates estimates

Total expenditure retained within the remainder of Toowoomba Regional Council is estimated at \$341.72 million in 2013, increasing to \$656.18 million in 2031. A significant proportion of expenditure within the remainder of Toowoomba Regional Council is anticipated to be captured by Toowoomba City, increasing from \$261.89 million in 2013 to \$501.69 million in 2031.

Total expenditure leakage outside Toowoomba Regional Council from households within the remainder of Toowoomba Regional Council was estimated at \$57.32 million in 2013. Therefore, total retail expenditure leakage from Toowoomba Regional Council households was estimated at \$125.27 million in 2013⁹, consistent with the findings of Urbis (2009)¹⁰.

Table 4.11 below provides a summary of the retail expenditure retention and leakage within the remainder of Toowoomba Regional Council.

Table 4.11: Retail Expenditure Retention and Leakage (\$m), Remainder of Toowoomba Regional Council, 2013 to 2031

Retail Category	2013	2016	2021	2026	2031
Retained within Remainder of Toowoomba Regional Council					
Groceries & take home food	\$150.89	\$169.64	\$202.49	\$242.74	\$288.63
Dining & takeaway food (incl. on-premise liquor)	\$54.37	\$61.30	\$73.48	\$88.42	\$105.50
Clothing, footwear & apparel	\$13.25	\$14.91	\$17.81	\$21.37	\$25.44
Personal & other goods	\$30.52	\$34.36	\$41.11	\$49.38	\$58.83
Core bulky goods	\$17.55	\$19.73	\$23.54	\$28.22	\$33.56
Ancillary bulky goods	\$20.55	\$23.11	\$27.58	\$33.06	\$39.33
Hardware	\$19.36	\$21.79	\$26.07	\$31.25	\$37.10
Takeaway liquor	\$20.01	\$22.50	\$26.87	\$32.20	\$38.27
Grocery & specialty	\$269.05	\$302.71	\$361.76	\$434.12	\$516.67
Bulky goods	\$57.46	\$64.63	\$77.19	\$92.53	\$110.00

⁹ Total retail expenditure leakage from Toowoomba Regional Council in 2013 = \$67.95 million (refer to Table 4.9) + \$57.32 million (refer to Table 4.11).

¹⁰ Urbis (2009) estimated that total escape expenditure by households in Toowoomba Regional Council was \$133.1 million per annum.

Retail Category	2013	2016	2021	2026	2031
Total	\$341.72	\$384.58	\$459.80	\$551.68	\$656.18
Leakage to Toowoomba City					
Groceries & take home food	\$71.74	\$80.75	\$96.57	\$115.63	\$137.00
Dining & takeaway food (incl. on-premise liquor)	\$25.64	\$28.94	\$34.77	\$41.78	\$49.65
Clothing, footwear & apparel	\$30.99	\$34.89	\$41.75	\$50.07	\$59.47
Personal & other goods	\$44.94	\$50.62	\$60.61	\$72.77	\$86.59
Core bulky goods	\$41.13	\$46.27	\$55.29	\$66.23	\$78.60
Ancillary bulky goods	\$48.11	\$54.14	\$64.71	\$77.54	\$92.04
Hardware	\$7.47	\$8.40	\$10.02	\$12.03	\$14.34
Takeaway liquor	\$7.07	\$7.96	\$9.51	\$11.39	\$13.51
Grocery & specialty	\$180.39	\$203.16	\$243.21	\$291.63	\$346.22
Bulky goods	\$96.71	\$108.80	\$130.02	\$155.80	\$184.98
Total	\$261.89	\$294.72	\$352.37	\$422.41	\$501.69
Leakage outside Toowoomba Regional Council					
Groceries & take home food	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Dining & takeaway food (incl. on-premise liquor)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Clothing, footwear & apparel	\$11.06	\$12.45	\$14.89	\$17.86	\$21.23
Personal & other goods	\$14.42	\$16.26	\$19.50	\$23.39	\$27.76
Core bulky goods	\$14.67	\$16.50	\$19.71	\$23.61	\$28.04
Ancillary bulky goods	\$17.17	\$19.31	\$23.07	\$27.65	\$32.84
Hardware	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Takeaway liquor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grocery & specialty	\$25.48	\$28.71	\$34.38	\$41.25	\$48.99
Bulky goods	\$31.84	\$35.81	\$42.78	\$51.26	\$60.88
Total	\$57.32	\$64.52	\$77.16	\$92.51	\$109.87

4.6.3 Expenditure Captured from Darling Downs/South West and Lockyer Valley Regions

Toowoomba City also acts as a major service hub for the broader Darling Downs/South West regions, and to lesser extent the Lockyer Valley. An estimated \$319.28 million of expenditure is currently captured from these regions, with expenditure capture highest within the groceries & take home food and comparison shopping categories.

Table 4.10 below summarises the proportion of total expenditure within Toowoomba City captured from the hinterland (i.e. the remainder of Darling Downs/South West and Lockyer Valley regions).

Table 4.12: Expenditure Captured from the Remainder of Darling Downs/South West Region and Lockyer Valley (\$m), Toowoomba City, 2013-2031

	2013	2016	2021	2026	2031
Groceries & take home food	\$66.07	\$70.51	\$78.62	\$86.81	\$95.40
Dining & take-away food (incl. on-premise liquor)	\$31.46	\$33.61	\$37.50	\$41.46	\$45.64
Clothing, footwear & apparel	\$37.82	\$40.79	\$46.13	\$51.88	\$58.09
Personal & other goods	\$63.93	\$68.72	\$77.38	\$86.56	\$96.45
Core bulky goods	\$51.04	\$55.01	\$62.18	\$69.87	\$78.16
Ancillary bulky goods	\$59.31	\$63.93	\$72.28	\$81.23	\$90.90
Hardware	\$4.78	\$5.09	\$5.66	\$6.24	\$6.85
Takeaway liquor	\$4.87	\$5.19	\$5.77	\$6.34	\$6.95

Total Grocery & Specialty	\$204.16	\$218.81	\$245.40	\$273.06	\$302.53
Total Bulky Goods	\$115.12	\$124.04	\$140.12	\$157.34	\$175.91
Total	\$319.28	\$342.85	\$385.51	\$430.40	\$478.44

Source: Economic Associates estimates

4.6.4 Summary

In Toowoomba City, the projected inflows and outflows of retail expenditure are as follows:

- Expenditure retained: \$804.90 million in 2013, increasing to \$1,071.18 million in 2031;
- Expenditure leakage: \$67.95 million in 2013, increasing to \$90.36 million in 2031; and
- Expenditure injected to Toowoomba City: \$581.17 million in 2013, increasing to \$980.13 million in 2031.

Table 4.13 provides a summary of the retail expenditure inflows and outflows for Toowoomba City.

Table 4.13: Summary of Retail Expenditure Inflows and Outflows (\$m), Toowoomba City

	2013	2016	2021	2026	2031
Expenditure Retained	\$804.90	\$847.57	\$927.06	\$999.20	\$1,071.18
Expenditure Leakage to outside TRC	\$67.95	\$71.55	\$78.23	\$84.30	\$90.36
Expenditure Injection	\$581.17	\$637.57	\$737.88	\$852.81	\$980.13
Injection from Remainder of TRC	\$261.89	\$294.72	\$352.37	\$422.41	\$501.69
Injection from Rem DDSW and LV regions	\$319.28	\$342.85	\$385.51	\$430.40	\$478.44

Source: Economic Associates estimates

In the remainder of Toowoomba Regional Council, the projected inflows and outflows of retail expenditure are as follows:

- Expenditure retained: \$341.72 million in 2013, increasing to \$656.18 million in 2031; and
- Expenditure leakage: \$319.21 million in 2013, increasing to \$611.56 million in 2031.

Table 4.14 provides a summary of the retail expenditure inflows and outflows for the remainder of Toowoomba Regional Council.

Table 4.14: Summary of Retail Expenditure Inflows and Outflows, Remainder of Toowoomba Regional Council

	2013	2016	2021	2026	2031
Expenditure Retained	\$341.72	\$384.58	\$459.80	\$551.68	\$656.18
Expenditure Leakage	\$319.21	\$359.25	\$429.53	\$514.92	\$611.56
Leakage to Toowoomba City	\$261.89	\$294.72	\$352.37	\$422.41	\$501.69
Leakage to outside TRC	\$57.32	\$64.52	\$77.16	\$92.51	\$109.87

Source: Economic Associates estimates

4.7 Retail Expenditure Retention Rate

The retail expenditure retention rate is the quantum of retail expenditure retained and injected into a region divided by the retail expenditure generated by that region. A retail expenditure rate exceeding 100% indicates the catchment sustains a net inflow of expenditure.

In Toowoomba Regional Council the retail expenditure retention rate is estimated at:

- Grocery and specialty: expenditure retention of 93.5%;
- Bulky goods: expenditure retention of 84.0%; and
- All retail: expenditure retention of 89.9%.

Toowoomba City, being the focal point of the region, sustains net inflows of expenditure as represented by:

- Grocery and specialty: expenditure retention rate of 157.2% in 2013, increasing to 173.6% in 2031;
- Bulky goods: expenditure retention rate of 169.1% in 2013, increasing to 193.2% in 2031; and
- All retail: expenditure retention rate of 158.8% in 2013, increasing to 176.6% in 2031.

The retail floor space demand analysis highlights that while the quantum of net inflows and outflows of retail expenditure within Toowoomba Regional Council are similar, Toowoomba City currently records a significant net inflow of expenditure (i.e. captures significantly more expenditure than it loses). As a result, the demand for retail floor space within Toowoomba City is significantly higher than the supportable retail floor space estimates presented in Table 4.7 above.

4.8 Retail Floor Space Demand

Between 2013 and 2031, the level of retail floor space demand within Toowoomba Regional Council is anticipated to increase by:

- Grocery and specialty: additional 129,983m² of retail floor space demand; and
- Bulky goods: additional 76,608m² of retail floor space demand.

Toowoomba City is anticipated to be the driver of retail floor space demand within Toowoomba Regional Council, accounting for:

- Grocery and specialty: additional 87,960m² of retail floor space demand between 2013 and 2031 (or 67.7% of additional retail floor space demand in Toowoomba Regional Council); and
- Bulky goods: additional 60,441m² of retail floor space demand between 2013 and 2031 (or 78.7% of additional retail floor space demand in Toowoomba Regional Council).

Highfields and Westbrook are also anticipated to have significant increases in retail floor space demand between 2013 and 2031, increasing by 20,040m² and 11,352m², respectively.

Table 4.15 below outlines the supportable floor space within Toowoomba City and each of the catchments outside Toowoomba City to 2031.

Table 4.15: Retail Floor Space Demand, Toowoomba Regional Council, 2013-2031 (sqm)

	2013	2016	2021	2026	2031	Change, 2013-2031
Toowoomba City Catchments						
Grocery & Specialty	183,666	196,783	220,593	245,313	271,626	87,960
Bulky Goods	117,147	126,040	142,098	159,194	177,588	60,441
Total	300,813	322,823	362,691	404,507	449,214	148,401
Highfields						
Grocery & Specialty	11,557	13,427	16,679	21,060	26,427	14,870
Bulky Goods	4,018	4,668	5,799	7,322	9,188	5,170
Total	15,575	18,095	22,478	28,382	35,615	20,040
Gowrie						
Grocery & Specialty	3,534	3,994	4,806	5,722	6,704	3,169
Bulky Goods	1,505	1,701	2,047	2,437	2,855	1,350
Total	5,040	5,695	6,853	8,159	9,559	4,519
Westbrook						
Grocery & Specialty	6,394	7,448	9,529	11,857	14,436	8,042
Bulky Goods	2,633	3,067	3,923	4,882	5,943	3,311
Total	9,027	10,515	13,452	16,739	20,379	11,352
Cambooya						
Grocery & Specialty	3,313	3,889	4,849	6,023	7,340	4,027
Bulky Goods	1,396	1,638	2,043	2,537	3,092	1,696
Total	4,709	5,527	6,892	8,560	10,432	5,723
Crows Nest						
Grocery & Specialty	2,920	3,356	4,098	5,130	6,317	3,397
Bulky Goods	1,251	1,438	1,756	2,199	2,707	1,456
Total	4,171	4,795	5,855	7,329	9,024	4,853
Rosalie						
Grocery & Specialty	2,934	3,133	3,450	3,810	4,205	1,271
Bulky Goods	1,260	1,345	1,481	1,636	1,806	546
Total	4,194	4,478	4,932	5,447	6,011	1,817
Jondaryan						
Grocery & Specialty	5,341	5,690	6,323	7,042	7,774	2,433
Bulky Goods	1,984	2,114	2,349	2,616	2,888	904
Total	7,325	7,803	8,672	9,658	10,662	3,336
Greenmount						
Grocery & Specialty	1,530	1,718	1,999	2,355	2,719	1,189
Bulky Goods	658	739	860	1,013	1,169	511
Total	2,187	2,457	2,859	3,368	3,888	1,701
Pittsworth						
Grocery & Specialty	4,142	4,497	5,084	5,723	6,434	2,292
Bulky Goods	1,535	1,667	1,884	2,121	2,385	849
Total	5,678	6,164	6,969	7,844	8,819	3,141
Millmerran						
Grocery & Specialty	2,034	2,181	2,401	2,633	2,879	846
Bulky Goods	883	947	1,042	1,143	1,250	367
Total	2,917	3,128	3,443	3,776	4,129	1,212
Clifton						
Grocery & Specialty	1,825	1,903	2,036	2,178	2,313	488
Bulky Goods	774	807	863	923	981	207
Total	2,598	2,710	2,900	3,101	3,294	695

	2013	2016	2021	2026	2031	Change, 2013-2031
Toowoomba Regional Council						
Grocery & Specialty	229,191	248,019	281,848	318,848	359,174	129,983
Bulky Goods	135,043	146,170	166,146	188,023	211,851	76,808
Total	364,234	394,189	447,994	506,871	571,025	206,791

Source: Economic Associates estimates

4.9 Supply-Demand Balance (Economic Need)

The supply demand balance provides an indication as to the modelled oversupply or undersupply of retail floor space within Toowoomba Regional Council. A negative supply-demand balance indicates a shortfall of floor space. Conversely a positive supply-demand balance indicates an oversupply of floor space. The modelled supply-demand balance has assumed all approvals to date are constructed and operational by 2016.

It is estimated that Toowoomba City currently has an oversupply of grocery and specialty floor space, but an undersupply of bulky goods floor space. Within the rural catchments, Highfields and Westbrook are anticipated to record the largest shortages of retail floor space by 2031.

Table 4.16 summarises the supply-demand balance by catchment between 2013 and 2031.

Table 4.16: Supply-Demand Balance by Catchment, Toowoomba Regional Council, 2013-2031

	Supply					Demand					Supply - Demand Balance				
	2013	2016	2021	2026	2031	2013	2016	2021	2026	2031	2013	2016	2021	2026	2031
Toowoomba City															
Grocery & Specialty	203,991	223,549	223,549	223,549	223,549	183,666	196,783	220,593	245,313	271,626	20,324	26,766	2,956	-21,764	-48,077
Bulky Goods	105,407	120,643	120,643	120,643	120,643	117,147	126,040	142,098	159,194	177,588	-11,739	-5,396	-21,455	-38,551	-56,944
Total	309,398	344,192	344,192	344,192	344,192	300,813	322,823	362,691	404,507	449,214	8,585	21,370	-18,499	-60,315	-105,022
Highfields															
Grocery & Specialty	9,712	9,712	9,712	9,712	9,712	11,557	13,427	16,679	21,060	26,427	-1,845	-3,715	-6,967	-11,348	-16,715
Bulky Goods	830	830	830	830	830	4,018	4,668	5,799	7,322	9,188	-3,188	-3,838	-4,969	-6,492	-8,358
Total	10,542	10,542	10,542	10,542	10,542	15,575	18,095	22,478	28,382	35,615	-5,033	-7,553	-11,936	-17,840	-25,073
Gowrie															
Grocery & Specialty	1,260	2,989	2,989	2,989	2,989	3,534	3,994	4,806	5,722	6,704	-2,274	-1,005	-1,817	-2,733	-3,715
Bulky Goods	0	0	0	0	0	1,505	1,701	2,047	2,437	2,855	-1,505	-1,701	-2,047	-2,437	-2,855
Total	1,260	2,989	2,989	2,989	2,989	5,040	5,695	6,853	8,159	9,559	-3,780	-2,706	-3,864	-5,170	-6,570
Westbrook															
Grocery & Specialty	600	5,687	5,687	5,687	5,687	6,394	7,448	9,529	11,857	14,436	-5,794	-1,761	-3,842	-6,170	-8,749
Bulky Goods	0	0	0	0	0	2,633	3,067	3,923	4,882	5,943	-2,633	-3,067	-3,923	-4,882	-5,943
Total	600	5,687	5,687	5,687	5,687	9,027	10,515	13,452	16,739	20,379	-8,427	-4,828	-7,765	-11,052	-14,692
Cambooya															
Grocery & Specialty	410	410	410	410	410	3,313	3,889	4,849	6,023	7,340	-2,903	-3,479	-4,439	-5,613	-6,930
Bulky Goods	0	0	0	0	0	1,396	1,638	2,043	2,537	3,092	-1,396	-1,638	-2,043	-2,537	-3,092
Total	410	410	410	410	410	4,709	5,527	6,892	8,560	10,432	-4,299	-5,117	-6,482	-8,150	-10,022
Crows Nest															
Grocery & Specialty	3,480	4,930	4,930	4,930	4,930	2,920	3,356	4,098	5,130	6,317	560	1,574	832	-200	-1,387
Bulky Goods	1,190	1,190	1,190	1,190	1,190	1,251	1,438	1,756	2,199	2,707	-61	-248	-566	-1,009	-1,517
Total	4,670	6,120	6,120	6,120	6,120	4,171	4,795	5,855	7,329	9,024	499	1,325	265	-1,209	-2,904
Rosalie															
Grocery & Specialty	2,652	2,652	2,652	2,652	2,652	2,934	3,133	3,450	3,810	4,205	-282	-481	-798	-1,158	-1,553
Bulky Goods	80	80	80	80	80	1,260	1,345	1,481	1,636	1,806	-1,180	-1,265	-1,401	-1,556	-1,726
Total	2,732	2,732	2,732	2,732	2,732	4,194	4,478	4,932	5,447	6,011	-1,462	-1,746	-2,200	-2,715	-3,279
Jondaryan															
Grocery & Specialty	8,941	8,941	8,941	8,941	8,941	5,341	5,690	6,323	7,042	7,774	3,600	3,251	2,618	1,899	1,167
Bulky Goods	4,090	4,090	4,090	4,090	4,090	1,984	2,114	2,349	2,616	2,888	2,106	1,976	1,741	1,474	1,202
Total	13,031	13,031	13,031	13,031	13,031	7,325	7,803	8,672	9,658	10,662	5,706	5,228	4,359	3,373	2,369

	Supply					Demand					Supply - Demand Balance				
	2013	2016	2021	2026	2031	2013	2016	2021	2026	2031	2013	2016	2021	2026	2031
Greenmount															
Grocery & Specialty	90	90	90	90	90	1,530	1,718	1,999	2,355	2,719	-1,440	-1,628	-1,909	-2,265	-2,629
Bulky Goods	0	0	0	0	0	658	739	860	1,013	1,169	-658	-739	-860	-1,013	-1,169
Total	90	90	90	90	90	2,187	2,457	2,859	3,368	3,888	-2,097	-2,367	-2,769	-3,278	-3,798
Pittsworth															
Grocery & Specialty	9,480	9,480	9,480	9,480	9,480	4,142	4,497	5,084	5,723	6,434	5,338	4,983	4,396	3,757	3,046
Bulky Goods	4,010	4,010	4,010	4,010	4,010	1,535	1,667	1,884	2,121	2,385	2,475	2,343	2,126	1,889	1,625
Total	13,490	13,490	13,490	13,490	13,490	5,678	6,164	6,969	7,844	8,819	7,812	7,326	6,521	5,646	4,671
Millmerran															
Grocery & Specialty	2,220	2,220	2,220	2,220	2,220	2,034	2,181	2,401	2,633	2,879	186	39	-181	-413	-659
Bulky Goods	2,040	2,040	2,040	2,040	2,040	883	947	1,042	1,143	1,250	1,157	1,093	998	897	790
Total	4,260	4,260	4,260	4,260	4,260	2,917	3,128	3,443	3,776	4,129	1,343	1,132	817	484	131
Clifton															
Grocery & Specialty	1,500	1,500	1,500	1,500	1,500	1,825	1,903	2,036	2,178	2,313	-325	-403	-536	-678	-813
Bulky Goods	1,220	1,220	1,220	1,220	1,220	774	807	863	923	981	446	413	357	297	239
Total	2,720	2,720	2,720	2,720	2,720	2,598	2,710	2,900	3,101	3,294	122	10	-180	-381	-574
TRC															
Grocery & Specialty	244,336	272,160	272,160	272,160	272,160	229,191	248,019	281,848	318,848	359,174	15,144	24,140	-9,688	-46,688	-87,015
Bulky Goods	118,867	134,103	134,103	134,103	134,103	135,043	146,170	166,146	188,023	211,851	-16,176	-12,066	-32,042	-53,920	-77,748
Total	363,203	406,263	406,263	406,263	406,263	364,234	394,189	447,994	506,871	571,025	-1,031	12,074	-41,731	-100,608	-164,762

Note 1: A negative supply-demand balance indicates a shortfall of floor space. Conversely a positive supply-demand balance indicates an oversupply of floor space..

Note 2: The supply-demand balance assumes all approvals are constructed and operational by 2016.

Source: Economic Associates estimates

The analysis in Table 4.16 above highlights an oversupply of grocery and specialty retail floor space in Toowoomba City prior to 2021. Interrogation of disaggregated expenditure and floor space projections indicates that the most significant oversupply of grocery and speciality retail floor space is within the specialty comparison shopping categories, namely clothing, footwear & accessories and personal & other goods categories (as shown in Table 4.17 below).

A marginal oversupply of grocery & take-home food is evident within Toowoomba City. However, this is not of concern as the supply estimates have not been adjusted to reflect that a proportion of supermarket sales (typically 5% to 10% of sales) comprise general merchandise¹¹, rather than groceries & take home food.

Table 4.17: Supply Demand Balance by Category, Toowoomba City, 2013-2031

	2013	2016	2021	2026	2031
Supply					
Groceries & take home food	58,044	68,904	68,904	68,904	68,904
Dining & take-away food (incl. on-premise liquor)	33,169	38,908	38,908	38,908	38,908
Clothing, footwear & apparel	48,076	48,076	48,076	48,076	48,076
Personal & other goods	61,167	62,646	62,646	62,646	62,646
Bulky goods (incl. hardware)	105,407	120,643	120,643	120,643	120,643
Takeaway liquor	3,535	5,015	5,015	5,015	5,015
Total Grocery & Specialty	203,991	223,549	223,549	223,549	223,549
Total Bulky Goods	105,407	120,643	120,643	120,643	120,643
Total	309,398	344,192	344,192	344,192	344,192
Demand					
Groceries & take home food	55,062	58,758	65,516	72,344	79,496
Dining & take-away food (incl. on-premise liquor)	34,961	37,341	41,669	46,067	50,711
Clothing, footwear & apparel	31,518	33,991	38,444	43,234	48,412
Personal & other goods	53,271	57,265	64,481	72,134	80,377
Bulky goods (incl. hardware)	117,147	126,040	142,098	159,194	177,588
Takeaway liquor	8,855	9,429	10,482	11,533	12,630
Total Grocery & Specialty	183,666	196,783	220,593	245,313	271,626
Total Bulky Goods	117,147	126,040	142,098	159,194	177,588
Total	300,813	322,823	362,691	404,507	449,214
Supply Demand Balance					
Groceries & take home food	2,982	10,146	3,388	-3,440	-10,593
Dining & take-away food (incl. on-premise liquor)	-1,792	1,567	-2,762	-7,159	-11,803
Clothing, footwear & apparel	16,558	14,085	9,632	4,842	-336
Personal & other goods	7,896	5,382	-1,835	-9,488	-17,730
Bulky goods (incl. hardware)	-11,739	-5,396	-21,455	-38,551	-56,944
Takeaway liquor	-5,320	-4,414	-5,467	-6,518	-7,615
Total Grocery & Specialty	20,324	26,766	2,956	-21,764	-48,077
Total Bulky Goods	-11,739	-5,396	-21,455	-38,551	-56,944
Total	8,585	21,370	-18,499	-60,315	-105,022

Note 1: A negative (positive) supply-demand balance indicates a shortfall (oversupply) of floor space.

Note 2: The supply-demand balance assumes all approvals are constructed and operational by 2016.

Source: Economic Associates estimates

¹¹ General merchandise sales within supermarkets would typically fall within the personal & other goods category.

5 COMMERCIAL OFFICE FLOOR SPACE ASSESSMENT

5.1 Methodology

Consistent with the 2009 Activity Centres Study, this study projects demand for commercial office space for Toowoomba City and the remainder of Toowoomba Regional Council. However, the methodology presented in this report differs from that in the 2009 study in it also considers the following factors:

- Employment generated in commercial office sectors in Toowoomba Regional Council (in particular Toowoomba City) as a result of increased coal and gas production within the Darling Downs region; and
- The presence of non-employing businesses (i.e. sole traders) within home based offices (the 2009 study assumed that all employment in commercial office sectors is within commercial office space).

5.2 Assumptions

The assumptions used to calculate future commercial office floor space demand within Toowoomba Regional Council are presented in two subsections:

- Baseline demand: Assumptions made regarding the future commercial office floor space demand in Toowoomba Regional Council in the absence of proposed coal and gas activity within Darling Downs (i.e. the Toowoomba Regional Council economy grows, but does not record structural change); and
- Coal and gas activity demand: Assumptions made regarding future coal and gas production within the Darling Downs region and the consequent generation of employment within commercial office sectors. A number of scenarios are presented demonstrating the likely demand outcomes of the Toowoomba region benefiting from resource sector development activity to varying degrees.

In defining the industry sectors that require commercial office space, the baseline assumptions use the 2006 two digit ANZSIC classifications, whereas the coal and gas activity assumptions rely on the 111 sectors as defined in the Economic Associates regional input-output model.

Table 5.1 below provides a summary of the industry sectors that require commercial office space.

Table 5.1: Industry Sectors that Require Commercial Office Space

Industry Sector	Baseline Assumptions	Coal and Gas Activity Assumptions
Mining ¹	• Coal mining • Metal ore mining • Non-metallic mineral mining & quarrying • Oil & gas extraction • Exploration & other mining support services	• Coal mining • Oil & gas extraction • Iron ore mining • Non ferrous metal ore mining • Non metallic mineral mining • Exploration & mining support services
Financial & insurance services	• Finance • Insurance & superannuation funds • Auxiliary finance & insurance services • Finance & insurance services, nfd	• Finance • Insurance & superannuation funds • Auxiliary finance & insurance services
Professional, scientific & technical services	• Professional, scientific & technical services (except computer systems design & related services) • Professional, scientific & technical services, nfd • Computer systems design & related services	• Professional, scientific & technical services • Computer systems design & related services
Health care & social assistance	• Medical & other health care services	• Health care services
Rental, hiring & real estate services	• Property operators & real estate services	• Non-residential property operators & real estate services
Public administration & safety	• Public administration	• Public administration & regulatory services
Information media & telecommunications	• Internet publishing & broadcasting • Internet service providers, web search portals and data processing services	• Publishing (except internet & music publishing) • Broadcasting (except internet) • Internet publishing & broadcasting & services providers, websearch portals & data processing services
Administrative & support services	• Administrative services	• Building cleaning, pest control, administrative & other support services

Note 1: Only part of the mining sector requires commercial office space. The proportion of the mining workforce requiring office space varies from region to region. This is discussed in more detail in subsequent sections.

Proportion of Mining Employment in Commercial Office Sectors

The mining sector employs persons both within commercial office space and on-site at mining operations. To determine the likely split of employment between commercial office space and on-site, a review of employment by occupation data for the mining sector was carried out. The following occupations are most likely related to commercial office space activity:

- Managers;
- Professionals;
- Community and personal service workers;
- Clerical and administrative workers;
- Sales workers.

As of the 2011 Census of Population and Housing, these occupations accounted for approximately 26% of employment in the mining sector in Toowoomba Regional Council. For the purposes of the baseline assessment, it has been assumed that the proportion of mining employment within commercial office sectors would remain constant throughout the projection period.

5.2.1 Baseline Assumptions

The baseline demand projection can be best characterised as a scenario in which the Toowoomba regional economy grows, but retains its current economic structure. Relevant analytical assumptions are presented below.

Size of Working Age Population

The analysis presented below defines the working age population as comprising persons aged 15-64 years. The Australian Bureau of Statistics Labour Force Survey on the other hand considers the working age population to include persons aged 15 years and over. It is our view that the 15-64 year age cohort is more representative of the age range in which persons are likely to work, as persons in the 65 years and over age cohort are typically retired.

In Toowoomba Regional Council, the size of the working age population is projected to increase from 109,492 persons in 2011 to 146,853 persons in 2031, or by 1.6% per annum. The forecast rate of population growth in the rural catchments (i.e. those outside of Toowoomba City) of 2.4% per annum would increase population by 65,465 persons by 2031.

The projected size of the working age population within Toowoomba Regional Council between 2013 and 2031 is summarised in Table 5.2.

Table 5.2: Projected Size of Working Age Population (15-64 years), Toowoomba Regional Council, 2013-2031

	2013	2016	2021	2026	2031	Ave. Ann. Growth, 2013-31
Toowoomba City	66,509	67,626	71,047	75,612	81,388	1.1%
Remainder of Toowoomba Regional Council	42,983	46,511	51,880	58,630	65,465	2.4%
Toowoomba Regional Council	109,492	114,137	122,927	134,242	146,853	1.6%

Source: Office of Economic and Statistical Research (2011)

Labour Market Characteristics

Precise prediction of employment levels into the future is difficult, because of the cyclical nature of economic activity and employment. As of the 2011 Census of Population and Housing, the 15-64 year unemployment rates within Toowoomba Regional Council were:

- Toowoomba City – 5.7%;
- Remainder of Toowoomba Regional Council – 3.8%;
- Toowoomba Regional Council – 5.0%;

Over the last three Censuses, the 15-64 year unemployment rates within Toowoomba Regional Council were:

- Toowoomba City – 6.3%;
- Remainder of Toowoomba Regional Council – 4.5%;
- Toowoomba Regional Council – 5.5%;

For the purposes of this assessment, it has been assumed that the 15-64 year unemployment rates within Toowoomba City and the remainder of Toowoomba Regional Council will trend upwards towards the medium to long term average (2001-2011) by 2031.

The labour force participation rates for the 15-64 population as of the 2011 Census of Population and Housing were:

- Toowoomba City – 71.9%;
- Remainder of Toowoomba Regional Council – 74.7%; and
- Toowoomba Regional Council – 73.0%.

It is anticipated that in the longer term, labour force participation rates are likely to marginally increase in this age category, consistent with the upward trend witnessed in labour force participation rates between the 2001 and 2011 Censuses.

Assumed unemployment rates and labour force participation rates between 2013 and 2031 are shown in Table 5.3.

Table 5.3: Projected Labour Market Characteristics (15-64 population), Toowoomba Regional Council, 2013-2031

	2013	2016	2021	2026	2031
Unemployment Rate					
Toowoomba City	5.8%	5.9%	6.0%	6.2%	6.3%
Remainder of Toowoomba Regional Council	3.9%	4.1%	4.2%	4.4%	4.5%
Toowoomba Regional Council	5.0%	5.1%	5.2%	5.4%	5.5%
Labour Force Participation Rate					
Toowoomba City	72.7%	73.7%	75.5%	77.3%	79.1%
Remainder of Toowoomba Regional Council	75.3%	76.3%	78.1%	79.9%	81.7%
Toowoomba Regional Council	73.7%	74.8%	76.6%	78.4%	80.3%

Note: The unemployment rate and labour force participation rates presented in this table are for the 15-64 year age population.

Source: Australian Bureau of Statistics (2012a) and Economic Associates estimates

Resident Employment by Industry

In the absence of employment opportunities generated by increased coal and gas production within the Darling Downs region, the proportion of residents in Toowoomba Regional Council employed within commercial office sectors is anticipated to fall from 17.8% in 2013 to 17.0% in 2031.

Table 5.4 below summarises the projected employment within commercial office sectors between 2013 and 2031.

Table 5.4: Projected Resident Employment within Commercial Office Sectors by Catchment, Toowoomba Regional Council, 2013-2031

	2013	2016	2021	2026	2031
Toowoomba City	18.7%	18.5%	18.3%	18.1%	17.9%
Remainder of Toowoomba Regional Council	16.5%	16.4%	16.2%	16.0%	15.9%
Toowoomba Regional Council	17.8%	17.6%	17.4%	17.2%	17.0%

Source: Australian Bureau of Statistics (2012a) and Economic Associates estimates

Employment Retention

Table 5.5 below summarises the assumed employment retention within Toowoomba Regional Council between 2013 and 2031.

Table 5.5: Projected Employment Retention within Commercial Office Sectors by Catchment, Toowoomba Regional Council, 2013-2031

Employment Retention	
Toowoomba City	102.3%
Remainder of Toowoomba Regional Council	52.5%
Toowoomba Regional Council	78.2%

Source: Australian Bureau of Statistics (2012a) and Economic Associates estimates

5.2.2 Coal and Gas Activity Related Demand

The immediately preceding sections outline assumptions for generating baseline demand projections. These baseline projections do not consider the prospect of structural change within the Toowoomba regional economy. However, the Toowoomba region is likely to face major structural change as a result of burgeoning resource sector activity in the Surat Basin. At this stage of the development pipeline, the extent of this change is unclear, hence the need to generate a range of demand scenarios.

Key assumptions for identifying future structural change include:

- Major projects in the development pipeline;
- Value of production;
- Consequent employment generation given estimated production value; and
- Proportion of employment generated in white collar roles.

Coal Projects in Development Pipeline

There are currently ten thermal coal projects proposed and at an advanced stage within the Darling Downs regional plan area, which would produce an additional 71.5 million tonnes per annum of saleable coal production if all were to proceed.

While it is recognised that there are also a number of coal exploration projects are underway, it is considered premature to consider these in the analysis.

Table 5.6 below summarises the coal projects considered in the commercial office floor space demand assessment for the Darling Downs region.

Table 5.6: Coal Projects Considered in Commercial Office Floor Space Demand Estimates, Darling Downs Regional Plan Area

Project	Saleable Coal Production (Mt / annum)	Timing
Bundi underground	5.0	2015
Cameby Downs open-cut	10.0	2014
Elimatta open-cut	5.0	2014-15
Horse Creek open-cut	3.8	2013
New Acland open-cut, Stage 3	4.0	2014
Norwood underground	5.0	2015
The Range	7.0	2014
Wandoan open-cut	22.0	2013
Wilkie Creek open-cut	5.8	2013
Woori (Guluguba) open-cut	4.0	2013

Source: Department of Natural Resources & Mines (2012)

Volume and Value of Coal Production

In assessing the future coal production pipeline within the Darling Downs regional plan area it has been assumed that coal production ramps up over a three year period.

If all projects were to proceed as per the timing outlined in Table 5.6 above and allowing for the three year ramp up period, thermal coal production from these projects would increase from 11.8 million tonnes in 2013 to 71.5 million tonnes from 2017 onwards.

The value of coal exports from the Darling Downs regional plan area was estimated by applying coal price parameter values to projected saleable coal production. A thermal coal price of \$95 per tonne was adopted for the analysis. The coal price is likely to vary over time and any major and any sustained departures from the assumed coal price (above) would have implications for the region's forward economic outlook.

Based on the above assumptions, the value of additional coal production within the Darling Downs regional plan area is projected to increase from \$1.1 billion in 2013 to \$6.8 billion from 2017 onwards.

Table 5.7 below summarises the projected additional thermal coal production and value of additional production within the Darling Downs regional plan area, assuming a coal price of \$95 per tonne.

Table 5.7: Projected Additional Coal Production and Value of Production, 2013-2031

	Saleable Coal (Mt)	Value of Production (\$ / tonne)	Total Value of Production (\$m)
2013	11.8	95	1,125.0
2014	30.7	95	2,914.9
2015	54.5	95	5,179.9
2016	66.5	95	6,319.9
2017+	71.5	95	6,794.9

Source: Economic Associates estimates

Gas Projects in Development Pipeline

There were five coal seam gas (CSG) field development projects identified within the Darling Downs regional plan area. If all projects ultimately proceed at full capacity, coal seam gas production would increase by 2,039 PJ per annum.

Table 5.8 below summarises the coal seam gas projects within the current development pipeline.

Table 5.8: Coal Seam Gas Projects in Development Pipeline, Darling Downs Regional Plan Area

Project	Ultimate Production (PJ / annum)	Start up year
Australian Pacific LNG (Field Development)	800	2013
Gladstone LNG Stage 1 & 2 (Field Development)	212	2013
Queensland Curtis LNG Project (Field Development)	600	2013
Ironbark CSG Project	44	2014
Surat Gas Project (Field Development)	383	2017

Volume and Value of Gas Production

It has been assumed that there is a five year ramp up period for all CSG projects within the Darling Downs regional plan area, and that the start up year is consistent with Table 6.17 for all projects.

Based on these above assumptions, total CSG production within the Darling Downs regional plan area is projected to increase from 605PJ in 2013 to 2,039PJ from 2021 onwards.

Coal seam gas is not sold directly, rather it is first processed and converted into liquefied natural gas (LNG).

For the purposes of this assessment it has been assumed that the netback price of CSG projects within the Darling Downs regional plan area is \$4.50 per GJ (or \$4.5 million per PJ)¹². Based on this assumption, the value of CSG production in the Darling Downs regional plan area is projected to increase from \$322 million in 2013 to \$9,176 million in 2021 and beyond.

Table 5.9: Volume and Value of Additional CSG Production (\$m), Darling Downs Regional Plan Area

	CSG Production (PJ)	Value of CSG Production (\$m)
2013	322	1,451
2014	654	2,941
2015	985	4,432
2016	1,316	5,922
2017	1,724	7,757
2018	1,809	8,141
2019	1,886	8,486
2020	1,962	8,831
2021+	2,039	9,176

Source: Department of Employment, Economic Development & Innovation (2012)

Proportion of Mining Employment within Commercial Office Sectors

As outlined above, mining sector employment is located both within commercial office space and on-site at mining operations, with the following occupations most likely within commercial office space:

- Managers;
- Professionals;
- Community and personal service workers;
- Clerical and administrative workers; and
- Sales workers.

However, as shown in Table 5.10 below, the proportion of mining employment within commercial office sectors can vary considerably by region. The table illustrates that areas with significant mining activity (Mackay SD and Fitzroy SD) tend to have a lower incidence of employment within commercial office sectors than areas with head office functions (e.g. Brisbane LGA).

¹² Previous studies have identified the netback price required for CSG projects. Energy Supply Associate of Australia (ESAA, 2011) estimated a short to medium term netback price for CSG of between \$4 and \$5 per GJ. McLennan Magasanik & Associates (MMA, 2009) estimated medium to long term netback prices for CSG of between \$3 and \$6.50 per GJ.

Table 5.10: Proportion of Mining Employment within Commercial Office Sectors - Region Comparison

Region	% of Mining Employment within Commercial Office Sectors
Toowoomba Regional Council	26%
Mackay SD	20%
Fitzroy SD	19%
Brisbane LGA	87%

Source: Australian Bureau of Statistics (2012a)

For the purposes of this assessment, it has been assumed that 20% of mining employment generated by coal and gas activity within the Darling Downs region is located within commercial office sectors, consistent with the Mackay SD experience.

5.3 Commercial Office Floor Space Demand

5.3.1 Baseline Demand

Estimates of projected commercial office floor space demand within the Toowoomba regional economy in the absence of structural change are presented below.

Employment within Commercial Office Sectors

Table 5.11 below summarises projected employment within commercial office sectors within Toowoomba Regional Council between 2013 and 2031.

Table 5.11: Projected Employment within Commercial Office Sectors by Catchment - Baseline Demand, Toowoomba Regional Council, 2013-2031

	2013	2016	2021	2026	2031
Toowoomba City	8,845	9,051	9,605	10,318	11,203
Remainder of Toowoomba Regional Council	4,199	4,293	4,556	4,895	5,319
Toowoomba Regional Council	13,044	13,344	14,161	15,213	16,522

Source: Economic Associates estimates

Employment within Commercial Office Space

In Toowoomba City, the majority of employment in commercial office sectors is contained within employing businesses (as opposed to sole traders). The financial and insurance services and rental, hiring and real estate services sector recorded the highest incidence of sole traders.

In the remainder of Toowoomba Regional Council, less than half of all financial and insurance services businesses had employees.

Employment includes jobs in sole trader businesses as well as in employing businesses. The Australian Bureau of Statistics information regarding the incidence of employment in sole trader businesses and employing businesses by industry at the SA2 level has been applied to the commercial office employment analysis.

Table 5.12 below summarises the proportion of commercial office sector employment within employing businesses in Toowoomba City and the remainder of Toowoomba Regional Council.

Table 5.12: Proportion of Commercial Office Sector Employment within Employing Businesses by Catchment, Toowoomba Regional Council, 2013-2031

Industry Sector	Toowoomba City	Remainder of Toowoomba Regional Council	Toowoomba Regional Council
Mining	35%	90%	75%
Financial & insurance services	80%	45%	75%
Professional, scientific & technical services	90%	85%	90%
Health care & social assistance	95%	95%	95%
Rental, hiring & real estate services	80%	70%	80%
Public administration & safety	100%	95%	100%
Information media & telecommunications	85%	70%	75%
Administrative & support services	95%	95%	95%

Note: Percentages are rounded to the nearest 5%.

Source: Australian Bureau of Statistics (2012b), Economic Associates estimates

Sole trader businesses can operate as both a home based business (and hence do not require commercial office space) or within commercial office space.

For the purposes of this assessment, it has been assumed that:

- Approximately half of all sole trader businesses within each catchment require commercial office space; and
- All employing businesses within each catchment require commercial office space.

Table 5.13 below provides a summary of the projected employment within commercial office space in employing and non-employing businesses under the baseline demand scenario between 2013 and 2031.

Table 5.13: Projected Employment within Commercial Office Space - Baseline Demand, Toowoomba Regional Council, 2013-2031

	2013	2016	2021	2026	2031
<u>Employing Businesses</u>					
Toowoomba City	7,423	7,600	8,073	8,680	9,433
Remainder of Toowoomba Regional Council	3,064	3,132	3,324	3,572	3,881
Toowoomba Regional Council	10,487	10,733	11,397	12,252	13,314
<u>Non-Employing Businesses</u>					
Toowoomba City	711	726	766	819	885
Remainder of Toowoomba Regional Council	568	580	616	662	719
Toowoomba Regional Council	1,279	1,306	1,382	1,481	1,604
<u>All Businesses</u>					
Toowoomba City	8,134	8,326	8,839	9,499	10,318
Remainder of Toowoomba Regional Council	3,631	3,713	3,940	4,233	4,600
Toowoomba Regional Council	11,765	12,038	12,779	13,733	14,918

Source: Economic Associates estimates

Baseline Commercial Office Floor Space Demand

The average office space per employee in Queensland is 20m² per employee. However, the Queensland Government along with a number of other state governments has set occupancy density targets of 15m² per employee. For the purpose of this assessment the midpoint of 17.5m² per employee has been applied.

In the case of sole traders who tend to occupy smaller tenancies, a floor space ratio of 30m² per sole trader has been assumed.

Table 5.14 below provides an overview of commercial office floor space demand in Toowoomba Regional Council under the baseline demand scenario between 2013 and 2031.

Table 5.14: Projected Commercial Office Floor Space Demand - Baseline Demand, Toowoomba Regional Council, 2013-2031

	2013	2016	2021	2026	2031
Employing Businesses					
Toowoomba City	129,905	133,005	141,274	151,901	165,079
Remainder of Toowoomba Regional Council	53,612	54,816	58,175	62,503	67,920
Toowoomba Regional Council	183,517	187,821	199,449	214,404	232,999
Non-Employing Businesses					
Toowoomba City	21,329	21,766	22,988	24,573	26,545
Remainder of Toowoomba Regional Council	17,028	17,410	18,477	19,852	21,572
Toowoomba Regional Council	38,357	39,176	41,465	44,425	48,117
All Businesses					
Toowoomba City	151,235	154,771	164,262	176,475	191,623
Remainder of Toowoomba Regional Council	70,639	72,226	76,652	82,355	89,492
Toowoomba Regional Council	221,874	226,997	240,914	258,829	281,116

Source: Economic Associates estimates

Table 5.15 below summarises the incremental commercial office floor space demand by catchment within Toowoomba Regional Council between 2016 and 2031.

Table 5.15: Incremental Commercial Office Floor Space Demand - Baseline Demand, Toowoomba Regional Council, 2013-2031

	2016	2021	2026	2031
Toowoomba City	3,537	13,027	25,240	40,389
Remainder of Toowoomba Regional Council	1,586	6,012	11,715	18,853
Toowoomba Regional Council	5,123	19,040	36,955	59,242

Note: Incremental commercial office floor space demand estimates are on 2013 levels.
Source: Economic Associates estimates

5.3.2 Resource Sector Generated Demand (Structural Change Scenarios)

Additional commercial office floor space demand generated within Toowoomba City from major resource sector activity within the broader Darling Downs region is estimated below.

Employment in Commercial Office Sectors

If all proposed coal and gas projects within the Darling Downs region as outlined above were to proceed, they would generate an estimated 716 jobs in commercial office sectors in 2013 increasing to 4,394 jobs in commercial office sectors in 2031.

The sectors which would generate the largest levels of employment would be:

- Mining (increasing from 398 jobs in 2013 to 2,442 jobs in 2031);
- Professional, scientific & technical services (increasing from 128 jobs in 2013 to 786 jobs in 2031); and
- Finance (increasing from 76 jobs in 2013 to 470 jobs in 2031).

The analysis assumes that the proportion of employment within employing businesses is consistent with the Toowoomba City average, as presented in Table 5.11 above, and that 50% of all non-employing businesses demand commercial office space.

Table 5.16: Employment in Commercial Office Sectors and Commercial Office Space - Coal & Gas Activity Demand, Darling Downs region, 2013-2031

Year	Employment in Commercial Office Sectors	Employment in Commercial Office Space	
		Employing Businesses	Non-Employing Businesses
2013	716	412	152
2016	3,655	2,098	779
2021	4,394	2,530	932
2026	4,394	2,530	932
2031	4,394	2,530	932

Source: Economic Associates estimates

Commercial Office Employment within Toowoomba City

The estimates presented in Table 5.16 above represent the total employment generated in commercial office sectors as a result of coal and gas activity in the Darling Downs region. It is anticipated that a significant proportion of this employment would be located within commercial office space in Toowoomba City, as it is the major centre within the region.

For the purpose of this assessment, three alternative employment scenarios have been presented:

- Scenario 1: Baseline demand plus Toowoomba City sustains only spill over benefits from the Surat Basin (25% of employment in commercial office space generated by coal and gas activity is in commercial office space in Toowoomba City);
- Scenario 2: Baseline demand plus Toowoomba City sustains a significant share of Surat Basin benefits (50% of employment in commercial office space generated by coal and gas activity is in commercial office space in Toowoomba City); and
- Scenario 3: Baseline demand plus Toowoomba City sustains the majority of Surat Basin benefits (75% of employment in commercial office space generated by coal and gas activity is in commercial office space in Toowoomba City).

Scenario 3 is considered to be highly optimistic and as such improbable, but has been presented to provide a full spectrum of potential outcomes for Toowoomba City.

The analysis assumes that the remainder of commercial office sector employment is generated elsewhere within the Darling Downs region, outside the Toowoomba Regional Council boundary.

Table 5.17 below presents the projected employment in commercial office space in Toowoomba City under each of the three scenarios.

Table 5.17: Projected Employment in Commercial Office Space - Consideration of Coal & Gas Activity Assumptions, Toowoomba City, 2013-2031

Year	Employing Businesses			Non Employing Businesses		
	Scenario 1	Scenario 2	Scenario 3	Scenario 1	Scenario 2	Scenario 3
2013	7,526	7,629	7,732	749	787	825
2016	8,125	8,649	9,174	920	1,115	1,309
2021	8,705	9,338	9,970	999	1,232	1,465
2026	9,313	9,945	10,578	1,052	1,285	1,518
2031	10,066	10,698	11,331	1,118	1,351	1,584

Source: Economic Associates estimates

Coal & Gas Commercial Office Floor Space Demand

Table 5.18 below summarises the potential commercial office floor space demand in Toowoomba City under each of the three scenarios.

Table 5.18: Projected Commercial Office Floor Space Demand - Consideration of Coal & Gas Activity Assumptions, 2013-2031

Year	Projected Floor Space Demand			Incremental Floor Space Demand		
	Scenario 1	Scenario 2	Scenario 3	Scenario 1	Scenario 2	Scenario 3
2013	154,178	157,121	160,065	-	-	-
2016	169,788	184,804	199,820	15,610	27,683	39,756
2021	182,322	200,381	218,441	28,144	43,260	58,376
2026	194,534	212,594	230,654	40,356	55,473	70,589
2031	209,683	227,743	245,802	55,505	70,621	85,738

Note: Incremental floor space demand is on 2013 levels.

Source: Economic Associates estimates

5.4 Commercial Office Need Assessment

From the preceding analysis, the demand for commercial office space is forecast to increase over the 2013 to 2031 period by between 40,389m² (baseline demand) and 85,738m² (Scenario 3). It is anticipated that commercial office demand within Toowoomba City will be consistent with Scenario 1 (i.e. demand for 55,505m² of commercial office floor space by 2031), as it represents the most likely capture of benefits from development activity within the Surat Basin.

In the early years of the projection period, it is possible that some additional commercial office demand would be accommodated within existing vacancies (approximately 19,500m² in the Toowoomba CBD). However, the quality of a number of commercial office vacancies may be considered inappropriate for potential new tenants within the region. For example, discussions with local and national real estate agents highlighted there is a market desire for higher quality office accommodation, particularly amongst professional services firms entering or expanding within Toowoomba.

Table 5.19: Incremental Commercial Office Demand, 2016-2031

	2016	2021	2026	2031
Toowoomba City				
Baseline Demand	3,537	13,027	25,240	40,389
Scenario 1	15,610	28,144	40,356	55,505
Scenario 2	27,683	43,260	55,473	70,621
Scenario 3	39,756	58,376	70,589	85,738
Remainder of Toowoomba Regional Council	1,586	6,012	11,715	18,853
Toowoomba Regional Council				
Baseline Demand	5,123	19,040	36,955	59,242
Scenario 1	17,196	34,156	52,071	74,358
Scenario 2	29,269	49,272	67,188	89,474
Scenario 3	41,342	64,389	82,304	104,591

Note: The estimates presented in this table do not take into account vacant commercial office space.
Source: Economic Associates estimates

6 LARGE FLOOR PLATE OFFICE MARKET ASSESSMENT

This chapter assesses the demand for large floor plate offices within Toowoomba City. A large floor plate office is defined as a single tenancy at least 1,500m² in size, provided over a single level. The key target market for large floor plate offices is businesses that employ 100 or more staff.

To assess the market demand for large floor plate offices, the following analysis has been undertaken:

- Overview of the Toowoomba Regional Council office market: This analysis was undertaken to identify any trends suggesting significant demand for large floor plate offices;
- Overview of the Brisbane City office market: This analysis was undertaken to determine whether market conditions in Brisbane may provide opportunities for office development in major satellite locations to Brisbane, such as Toowoomba; and
- Stakeholder consultation: Consultation was undertaken with national property agents, local property agents and major professional service firms to determine the likely market demand for large floor plate offices within Toowoomba City.

6.1 Toowoomba Regional Council Office Market

Table 6.1 below provides an overview of the commercial office leasing market within Toowoomba Regional Council. The majority of commercial office space for lease is located within the urban area of Toowoomba Regional Council (i.e. Toowoomba City). Only a small amount of floor space is located in the rural areas.

Lease market tenancies ranged from 10m² to 4,000m², with an average size of 248m². Typically, for lease tenancies were larger in Toowoomba City (average size: 255m²) than in rural Toowoomba (average size: 71m²). The median floor space for lease was also higher in Toowoomba City (166m²) than in rural Toowoomba (67m²).

Lease rates within Toowoomba Regional Council ranged from:

- \$87/m² to \$874/m² in Toowoomba City; and
- \$156/m² to \$571/m² in rural Toowoomba.

Table 6.1: Commercial Office Lease Market, Toowoomba Regional Council

	Toowoomba City	Toowoomba Rural	Total
Number of Properties	145	7	152
Total floor space (m ²)	36,700	500	37,200
Median Indicator			
Floor space (m ²)	166	67	147
\$/m ²	\$250	\$275	\$250
Mean Indicator			
Floor space (m ²)	255	71	248
\$/m ²	\$273	\$293	\$274
Range			
Minimum floor space (m ²)	10	48	10
Maximum floor space(m ²)	4,000	91	4,000
Minimum \$/m ²	\$87	\$156	\$87
Maximum \$/m ²	\$874	\$571	\$874

Source: Commercial office listings as of March 2013

6.2 Brisbane City Office Market

The relevance of the Brisbane office market to Toowoomba is that market conditions in Brisbane (i.e. low vacancy rates leading to significant upward pressure on rents) may provide opportunity for office development in major satellite locations to Brisbane, such as Toowoomba.

The major commercial office markets within Brisbane are:

- Brisbane CBD;
- Brisbane Fringe: Fortitude Valley, Bowen Hills, Newstead, South Brisbane, Spring Hill, Toowong, Milton, Kangaroo Point and Woolloongabba; and
- Major Brisbane Suburban: Chermside and Upper Mount Gravatt – Macgregor.

Typically, managers of state or regional office would seek to locate in the CBD or near city, but as availability declines and/or office accommodation costs increase locations in more peripheral markets are considered.

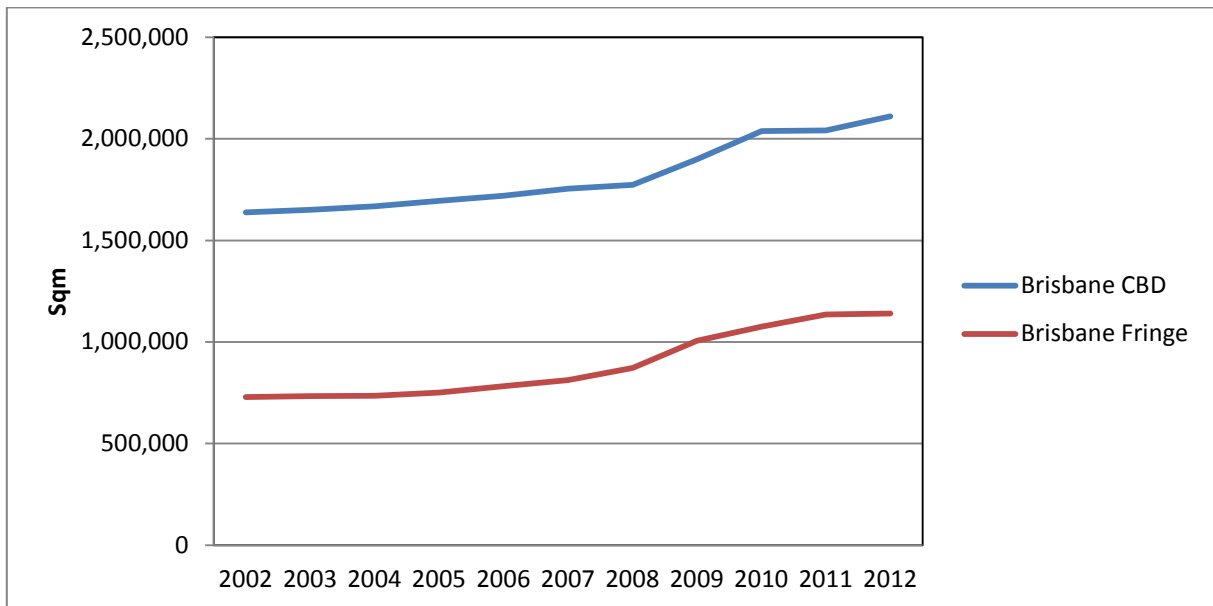
6.2.1 Brisbane CBD and Brisbane Fringe

Figure 6.1 below shows the total commercial office floor space within the Brisbane CBD and Brisbane Fringe. The supply of commercial office floor space increased between 2002 and 2012 as follows:

- Brisbane CBD: From 1.6 million square metres to 2.1 million square metres; and
- Brisbane Fringe: From 0.7 million square metres to 1.1 million square metres.

Over the 2002 to 2012 period the Brisbane Fringe grew by much more in relative terms (56%) than the CBD (29%) even though the absolute growth was fairly similar.

Figure 6.1: Total floor space commercial office, Brisbane CBD and Fringe (m²)



Source: Property Council of Australia (2012b)

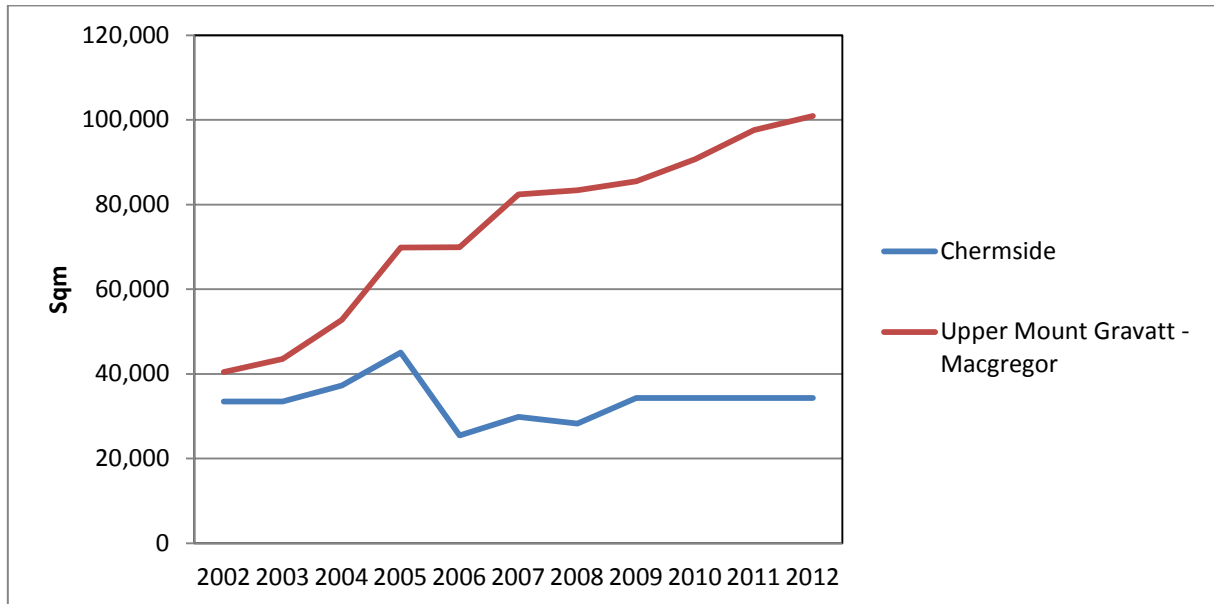
6.2.2 Major Brisbane Suburban Markets

Chermside and Upper Mount Gravatt – Macgregor represent the two major suburban office markets in Brisbane.

Figure 6.2 below reports the total commercial office floor space within the Chermside and Upper Mount Gravatt - Macgregor. Between 2002 and 2012 the supply of commercial office floor space increased from approximately 40,478m² to 100,894m² in Upper Mount Gravatt – Macgregor (or by approximately 10% per annum).

The commercial office floor space provision in Chermside ranged from 25,507m² (2006) to 45,008m² (2005) and was stable at 34,298m² from 2009 to 2012. Hence, there was a significant withdrawal of office space within Chermside between 2005 and 2006.

Figure 6.2: Total floor space commercial office, Chermside and Upper Mount Gravatt - Macgregor (m²)



Source: Property Council of Australia (2012b)

6.2.3 Vacancy Rates

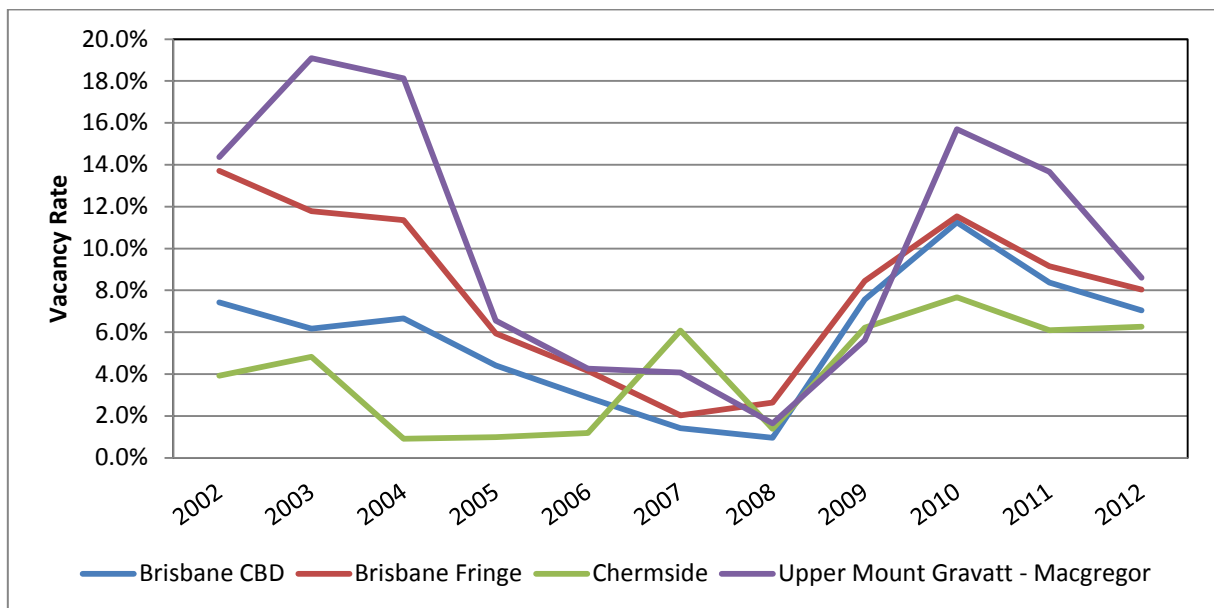
Commercial office vacancy rates in the major Brisbane markets over the period 2002 to 2012 were:

- Brisbane CBD: 1.0% (2008) to 11.2% (2010);
- Brisbane Fringe: 2.0% (2007) to 13.7% (2002);
- Chermside: 0.9% (2004) to 7.7% (2010); and
- Upper Mount Gravatt – Macgregor: 1.6% (2008) to 19.1% (2003).

Over the period 2002-2012 the behaviour of vacancy rates was similar across all major Brisbane markets. All regions recorded an increase in commercial office vacancy rates from 2008 spiking in 2010 with Upper Mount Gravatt – Macgregor recording the highest vacancy rate in 2010 (15.7%).

The trends reported in Figure 6.3 below tend to indicate that market prospects for establishing major offices in satellite locations, such as Toowoomba, were stronger in the 2006 to 2008 period. Between 2008 and 2010 vacancy rates in the Brisbane office market grew as a result of waning demand and major supply additions. Vacancy rates subsequently improved as new supply was eventually leased.

Figure 6.3: Vacancy Rates, Brisbane and Major Suburban Centres



Source: Property Council of Australia (2012b)

6.2.4 Summary

Analysis of the major Brisbane office markets suggests that market prospects for establishing large floor plate offices in satellite locations such as Toowoomba were strongest in the 2006 to 2008 period, when vacancy rates dropped below 4% in all Brisbane office markets. However, in response to low vacancy rates, significant commercial office supply was developed and brought onto the market. Between 2008 and 2010 vacancy rates in all Brisbane markets grew significantly as a result of waning demand and these major supply additions. Currently vacancy rates within the major Brisbane markets are between approximately 6% and 8%, which suggests the market is relatively balanced¹³.

6.3 Stakeholder Consultation

Stakeholder consultation was undertaken with five national property agents, three local property agents and five major professional services firms as a means of further informing the large floor plate office assessment.

Table 6.2 below provides a summary of the main points raised relating to the commercial office market in Toowoomba.

¹³ As a rule of thumb, commercial office markets are said to be in balance when their vacancy rate lies between 5% and 7%.

Table 6.2: Findings of Stakeholder Consultation, Toowoomba Commercial Office Market

Stakeholder Groups Interviewed	No.	Discussion
National Property Agents	5	A consistent theme iterated by national property agents was that the Toowoomba office market was typically perceived as a less significant office market than the suburban Brisbane, Gold Coast and to a lesser extent Sunshine Coast office markets. Most national agents are yet to commit to preparing semi-regular research reports for the Toowoomba market. However, four of the five agents noted that interest in the Toowoomba market had been growing up to around 2008 or 2009. The main driver of this interest related to demand for office space from supply chain firms to the burgeoning gas industry (and to a lesser extent coal). Interest typically came from professional services firms seeking to either establish or expand their presence in Toowoomba. These firms usually sought office accommodation in the 300 sqm to 600 sqm range. While prospective tenants had higher expectations of office quality, national property agents reported that the office space taken up would have been comparable to space found in Brisbane's suburban office markets (principally Mt Gravatt and Chermerside). Willingness to pay for office space generally peaked at around \$300/sqm-\$320/sqm. Three of the five national agents advised that they had been at some stage engaged by major resource, prospecting or mining services related companies to identify office accommodation opportunities within Toowoomba, however interest post-2009 has been limited. A key search criterion for prospective tenants was availability of short-term car parking and flexibility to provide hot desk space to accommodate visiting field staff (or contractors). Tenancies sought ranged from 500sqm to 1,500sqm. Responding national agents indicated that not all enquiries result in tenancies being secured. National agents indicated that the Toowoomba office market was largely comprised of small office tenancies (<500sqm) and of a comparable standard to suburban Brisbane stock. Agents did point out that the age of the stock and a perceived lack of reinvestment was an apparent constraint on rents. However, agents indicated that land owners are reluctant to refurbish their stock and in many cases do not require reinstatement on termination of the lease. Two of the three national agents interviewed raised some concerns with the 'CBD frame' (mixed use precinct) citing the potentially large supply of potential stock in the form of converted houses. These two agents indicated that this potential stock represents a 'pressure valve' on rents and has the effect of placing downward pressure on refurbishment activities. Put another way, the potential availability of converted houses for office accommodation increases the redevelopment or refurbishment risk for owners of purpose built office space.
Local Property Agents	3	Commercial office leasing within Toowoomba by local agencies is dominated by a small number of major commercial leasing agencies. While most locally based agents lease commercial stock, the majority of leasing activity occurs within two to three core commercial agencies. Local agencies perceive their primary competition in commercial office leasing as being from national tier agencies as opposed to other local agents. Hence, local agents are sometimes simultaneously engaged with national agencies to identify office accommodation for potential entrants or expansions within the Toowoomba office market. Local agents expressed generally similar views to national agents: • The Toowoomba office market is largely comprised of small scale office tenancies; • Interest in the Toowoomba office market appears to have peaked in 2009; • Larger office tenancies (>500sqm) taken up in the last five years have been occupied by either by major professional services companies or mining/resource related enterprises; and

Stakeholder Groups Interviewed	No.	Discussion
		• Quality of office stock being a major constraint on rental growth. Local agents believed that the average take-up of office space within Toowoomba varies between 750sqm p.a. to 1,500sqm p.a. (variability in responses), with 'reasonable' quality office space in Toowoomba being available for between \$250/sqm and \$300/sqm. Local agents agreed that there was a market desire for higher quality office accommodation which has been greatest among professional services firms entering or expanding within Toowoomba. Agents attribute this to company OH&S policies. When asked what would be the market willingness to pay for 'better' quality office accommodation, \$350/sqm tended to be the top of the range quoted. Local agents also lamented the unwillingness of property owners to reinvest or require reinstatement of tenancies post-termination. Local agents also pointed out that land owners were reluctant to participate in offering rental incentives. Local agents seemed ambivalent about the impact of the 'mixed use' precinct, suggesting that converted houses, represent a unique characteristic of the Toowoomba market.
Major Professional Services Firms	5	Interviews with agents indicated that major professional services firms had been a key factor in recent take-up (last five years) in the Toowoomba market. Hence, Economic Associates contacted the office managers of five major professional services firms (all but one were engineering firms). Respondents generally commented that the reason for their presence within Toowoomba was originally to service the government sector, but the market had evolved over the last ten years to the extent that resources sector engagements were now a key motivation for their presence in Toowoomba. These firms typically serviced the Darling Downs, South West Queensland and North West NSW. Respondents generally occupied around 500sqm, although in most instances a specific floor area could not be cited. Most respondents had occupied more than one floor over the past five years. When asked if there would be a preference to accommodate all staff over a single floor the response was in the positive, however concerns were raised about the inflexibility a large floor plate office conferred in the event of downsizing. It is unclear whether this concern is in response to current market conditions or whether it is long held. Two of the respondents indicated that there had been a lack of willingness on behalf of the property owner to offer 'standard' rental incentives, particularly in the form of contribution to fit out. Respondents generally have sought out tenancies in recently constructed office complexes. There was a general acceptance that at the expiry of their lease term and options they would relocate to another new building. The stated rationale for this was that company policies related to employee accommodation required a certain standard of office finish and that in provincial markets this standard could only be maintained by relocating to new offices every seven to ten years. A key requirement of these firms was the provision of adequate car parking to accommodate visiting field staff and contractors. Similarly, most respondents provided hot desk facilities for visiting field staff and contractors. All respondents either declined to advise or did not know their agreed rents.

Source: Pers comm, March 2013

6.4 Demand for Large Floor Plate Offices

The analysis presented so far has provided an indication of the split between commercial office floor space demand by employing businesses and sole traders. The analysis has also provided an indication of the likely floor space demand generated in Toowoomba City by anticipated coal and gas activity within the broader Darling Downs region and Surat Basin, but to this point has not provided any indication as to the potential demand for large floor plate offices within the Toowoomba CBD.

For the purposes of this analysis, businesses that employ 100 or more staff have been considered as the key market for large floor plate offices, as they typically require 1,500m² (15m² per worker) to 2,000m² (20m² per worker) of commercial office floor space.

As of June 2009, between 10% and 50% of businesses in commercial office sectors in Queensland employed 100 or more staff.

Table 6.3: Estimated Proportion of Employment in Businesses Employing 100+ Persons, Queensland

Queensland	
Mining	50%
Financial & insurance services	25%
Professional, scientific & technical services	15%
Health care & social assistance	20%
Rental, hiring & real estate services	10%
Public administration & safety	40%
Information media & telecommunications	45%
Administrative & support services	45%

Note: Estimates are rounded to the nearest 5%.
Source: ABS (2010), Economic Associates estimates

Assuming these proportions apply to the Toowoomba CBD, between 1,938-1,953 persons would be currently employed in businesses employing 100 or more persons in the Toowoomba CBD, increasing to 2,423-3,185 persons by 2031.

Assuming each large business employs 100 persons, these estimates translate to:

- Baseline: Up to four additional large businesses in the Toowoomba CBD by 2031;
- Scenario 1: Up to eight additional large businesses in the Toowoomba CBD by 2031;
- Scenario 2: Up to ten additional large businesses in the Toowoomba CBD by 2031; and
- Scenario 3: Up to twelve additional large businesses in the Toowoomba CBD by 2031.

Property agents indicated that it would be unlikely that any more than half of all large businesses within Toowoomba City would require a single large floor plate tenancy. The agency advice indicated that while there may be a preference in some segments of the office market for accommodating staff on a single floor plate, this preference rarely translates to a necessity.

Based on this advice, demand for large floor plate tenancies is projected to be:

- Baseline: Up to two additional large floor plate offices in the Toowoomba CBD by 2031 (or one additional large floor plate office every nine years);

- Scenario 1: Up to four additional large floor plate offices in the Toowoomba CBD by 2031 (or one additional large floor plate office every 4.5 years);
- Scenario 2: Up to five additional large floor plate offices in the Toowoomba CBD by 2031 (or one additional large floor plate office every 3.6 years); and
- Scenario 3: Up to six additional large floor plate offices in the Toowoomba CBD by 2031 (or one additional large floor plate office every three years).

It is our view that demand would be consistent with the Scenario 1 estimates.

Table 6.4 below summarises the projected demand for large office tenancies and large floor plate offices.

Table 6.4: Estimated Employment within Businesses Employing 100+ Persons, Toowoomba CBD

	2013	2016	2021	2026	2031
Total Employment					
Baseline	1,938	1,979	2,093	2,240	2,423
Scenario 1	1,943	2,120	2,364	2,522	2,826
Scenario 2	1,948	2,351	2,637	2,801	3,006
Scenario 3	1,953	2,598	2,817	2,981	3,185
Incremental Employment					
Baseline	-	41	155	302	485
Scenario 1	-	176	421	579	883
Scenario 2	-	403	689	853	1,057
Scenario 3	-	645	863	1,028	1,232
Additional Businesses with 100+ Persons (large tenancies)					
Baseline	-	-	1	3	4
Scenario 1	-	1	4	5	8
Scenario 2	-	4	6	8	10
Scenario 3	-	6	8	10	12
Additional Demand for Large Floor Plate Offices					
Baseline	-	-	-	1	2
Scenario 1	-	-	2	2	4
Scenario 2	-	2	3	4	5
Scenario 3	-	3	4	5	6

Source: Economic Associates estimates

7 RECOMMENDATIONS & REVISED STRATEGY

7.1 Revised Centres Hierarchy

This study does not recommend any major changes to the centres hierarchy of the Toowoomba region. Recommendations predominantly relate to the revise allocation of future retail and commercial floor space across the centres network and allied policy implications to the revised allocation.

Table 7.1 summarises the revised allocation of future floor space across the centres hierarchy.

7.1.1 Toowoomba City

As highlighted earlier in Chapter 4, there currently exists an oversupply of traditional retail floor space within Toowoomba City, particularly in the clothing, footwear & apparel and personal & other goods categories. As a result, any additional traditional floor space in Toowoomba City out to 2021 should be limited within the Toowoomba CBD, in order to strengthen its role in the centres hierarchy. A significant proportion of future traditional retail demand will be accounted for through the redevelopment and expansion of the Grand Central and Gardentown centres.

Additional traditional retail floor space to be provided within the remainder of Toowoomba City should be focussed towards servicing the convenience based needs of residents i.e. supermarkets, take-home food and dining opportunities. The provision of additional comparison retailing, particularly additional department stores, discount department stores and mini majors should be discouraged outside the Toowoomba CBD.

The allocation of retail floor space demand presented in Table 7.1 below for Toowoomba City is generally consistent with the recommendations made within the 2009 Activity Centres Study, with some adjustments made to redirect traditional retail floor space demand from the major centres to the Toowoomba CBD. There is sufficient zoned land to accommodate expansions in traditional retail activity within Toowoomba City to 2031.

An additional 17,600m² of bulky goods floor space is recommended within the Toowoomba CBD to 2031¹⁴, with a further 38,000m² of bulky goods floor space to be accommodated as an integrated centre, potentially at a suitable site within the mixed use zone of the Toowoomba CBD. Key criteria for bulky goods developments, including potential sites, are discussed further in Section 7.2 of the report. While the previous Activity Centres Study identified that a significant proportion of future bulky goods floor space demand should be accommodated within Kearneys Spring, a review of vacant zoned land suggests there is no longer sufficient land for significant expansion of bulky goods activity at this centre. As a result, this study suggests that further bulky goods demand previously allocated to the Kearneys Spring centre is redirected to a new bulky goods centre within Toowoomba City.

¹⁴ The expansion of Grand Central and Gardentown is likely to accommodate a proportion of future bulky goods floor space demand in Toowoomba City.

7.1.2 Remainder of Toowoomba Regional Council

Within the remainder of Toowoomba Regional Council, the majority of centres growth is anticipated within the urban fringe catchments of Highfields, Westbrook and Gowrie. In addition, population growth within the Cambooya and Greenmount catchments is anticipated to support expansion of retail activity within these centres. Commercial office floor space growth is anticipated to occur within the major rural centres of Oakey and Pittsworth.

It is anticipated that with the exception of Highfields Town Centre, additional retail provision within the remainder of Toowoomba Regional Council will be focussed towards meeting the convenience needs of each catchment.

Within the Highfields catchment, both Highfields Plaza and the Highfields Town Centre currently offer a similar scale of retail provision. Highfields Plaza has the highest provision of commercial office tenancies. It is envisaged that future retail and commercial development within the Highfields catchment should occur within the Highfields Town Centre, in order for it to ultimately fulfil its role as a major urban activity centre. The development of higher order uses, such as discount department stores and mini-majors should be permitted within the Highfields Town Centre.

Currently there exists only 0.9 hectares of remaining zoned land within the Highfields Town Centre, with a further 13.9 hectares of zoned land occupied by inconsistent uses. It is suggested that these inconsistent uses be encouraged to relocate outside of the major centre zone in order to accommodate future retail and commercial office demand within the centre. The relocation of these inconsistent uses should ensure there is sufficient zoned land to accommodate future growth within the Highfields Town Centre.

By 2031, retail demand within the Westbrook catchment is anticipated to reach approximately 15,000m² over and above the existing approval at Glenvale¹⁵. In the medium to long term, it is anticipated that future retail demand within the Westbrook catchment would be satisfied through expansion at the Glenvale district centre, and the delivery of a neighbourhood district activity centre within the Westbrook locality as residential subdivision occurs. Additional land will need to be identified to expand the centres zone at both Glenvale and Westbrook.

Within the Gowrie catchment, the two residential growth areas to 2031 are Kingsthorpe and Gowrie. The 2009 Activity Centres study highlights that the ultimate population of Kingsthorpe is to be approximately 10,050 persons, with the ultimate population of the locality of Gowrie to be 5,710 persons. It is envisaged that by 2031, Gowrie will function as a neighbourhood urban activity centre, offering a limited range of convenience based retailing, with Kingsthorpe to function as a local rural activity centre, potentially offering a limited line supermarket and supporting specialty retailing. A review of vacant land within the centres zone at each centre highlights that no additional zoned land will be required in order for expansion to occur.

¹⁵ Currently there exists an approval for a 5,087m² retail development at Glenvale, including a 3,100m² full line supermarket and 1,987m² of specialty retail. Once constructed, this development is anticipated to satisfy short to medium term demand within the Westbrook catchment.

The Cambooya and Greenmount catchments currently have modelled undersupplies of retail floor space, primarily due to low provision in both catchments¹⁶. It is envisaged that centre land will need to be zoned within Cambooya, Wyreema and Greenmount, with current activity located within the township zone.

Within the Crows Nest catchment, estimates indicate demand for some additional 2,904m² of retail floor space. However, it is envisaged in the short to medium term, additional retail floor space demand within the Crows Nest catchment should be housed in existing vacancies in the Crows Nest centre, rather than through the creation of a new centre. In the longer term, it is suggested that future growth be encouraged within the Crows Nest centre, consistent with the findings of the 2009 Activity Centres study. The land use survey highlighted only 0.2 hectares of centre zoned land was available, with a further 0.5 hectares occupied by housing and other inconsistent uses. It is suggested that these inconsistent uses are encouraged to relocate outside of the centre zone in the longer term, in order to accommodate future retail and commercial office demand within the centre.

The modelled supply-demand balance indicates a shortfall in traditional retail floor space within the Rosalie catchment of 1,553m² of traditional retail floor space and 1,726m² of bulky goods floor space. However, the inventory within the catchment indicates a significant number of vacant tenancies, distributed throughout the catchment, totalling 2,538m². Given that future population growth within the Rosalie catchment is anticipated to be distributed throughout the catchment, it is suggested that consolidation within existing centres, including the filling of existing vacancies would be preferable to the creation of a new centre.

Table 7.1: Additional Floor Space Demand and Centres Hierarchy Recommendations, Toowoomba Regional Council

Centre Name	Position in Network	Additional Floor Space Required (sqm)		
		Traditional Retail	Bulky Goods	Office
Regional Centre		33,650	17,600	40,500
Toowoomba CBD	Principal Activity Centre	33,650	17,600	40,500
Urban Centres		38,950	55,850	27,500
Highfields Town Centre	Major Urban Activity Centre	16,700	8,350	11,500
Kearneys Spring	Major Urban Activity Centre	3,550	-	7,250
Wilsonton	Major Urban Activity Centre	2,350	2,600	4,150
Clifford Gardens	Major Urban Activity Centre	-	-	1,550
Highfields Plaza	District Urban Activity Centre	-	-	-
Bridge Street Plaza	District Urban Activity Centre	400	-	200
Wyalla Plaza	District Urban Activity Centre	200	-	-
Newtown Shopping Centre	District Urban Activity Centre	200	-	150
The Range	District Urban Activity Centre	-	-	-
High Street Plaza	District Urban Activity Centre	200	-	-
West Ridge	District Urban Activity Centre	400	-	-
Glenvale	District Urban Activity Centre	3,200	3,550	400
Harlaxton	District Urban Activity Centre	-	-	-
Westbrook	District Urban Activity Centre	5,550	2,400	400
Gowrie	Neighbourhood Urban Activity Centre	1,250	950	200
North Ridge	Neighbourhood Urban Activity Centre	-	-	-
Northlands	Neighbourhood Urban Activity Centre	400	-	150
Mort Estate	Neighbourhood Urban Activity Centre	-	-	-

¹⁶ The Cambooya catchment currently has an estimated 410m² of retail floor space and 160m² of commercial office space. The Greenmount catchment has an estimated 150m² of retail floor space, including 60m² of vacant floor space.

Centre Name	Position in Network	Additional Floor Space Required (sqm)		
		Traditional Retail	Bulky Goods	Office
Newtown Parkside	Neighbourhood Urban Activity Centre	-	-	-
Mary Street Village	Neighbourhood Urban Activity Centre	200	-	-
Mackenzie Row	Neighbourhood Urban Activity Centre	-	-	-
Tor Centre	Neighbourhood Urban Activity Centre	-	-	-
Tor Street	Neighbourhood Urban Activity Centre	250	-	150
Ruthven Central	Neighbourhood Urban Activity Centre	150	-	-
Harristown	Neighbourhood Urban Activity Centre	-	-	-
Tower Shopping Village	Neighbourhood Urban Activity Centre	400	-	200
Centenary Heights / Southtown	Neighbourhood Urban Activity Centre	200	-	-
South Toowoomba	Neighbourhood Urban Activity Centre	-	-	-
Macdonald Town	Neighbourhood Urban Activity Centre	-	-	-
Foodworks on Mackenzie	Neighbourhood Urban Activity Centre	600	-	150
Drayton	Neighbourhood Urban Activity Centre	1,100	-	150
Middle Range Village	Neighbourhood Urban Activity Centre	-	-	-
Uni Plaza	Neighbourhood Urban Activity Centre	1,250	-	250
Fantastic Furniture	Specialist Urban Retail Centre	-	-	-
Bunnings	Specialist Urban Retail Centre	-	-	-
New Bulky Goods Centre	Specialist Urban Retail Centre	400	38,000	650
Rural Centres		12,900	7,250	5,750
Oakey	Major Rural Activity Centre	-	-	1,900
Pittsworth	Major Rural Activity Centre	-	-	1,900
Crows Nest	Major Rural Activity Centre	800	1,100	400
Millmerran	Major Rural Activity Centre	-	-	-
Clifton	Major Rural Activity Centre	-	-	-
Cambooya	Local Rural Activity Centre	4,850	2,150	550
Wyreema	Local Rural Activity Centre	2,100	950	400
Kingsthorpe	Local Rural Activity Centre	2,500	1,900	200
Greenmount	Local Rural Activity Centre	2,650	1,150	400
Yarraman	Local Rural Activity Centre	-	-	-
Goombungee	Local Rural Activity Centre	-	-	-
MacLagan	Local Rural Activity Centre	-	-	-
Peranga	Local Rural Activity Centre	-	-	-
Bowenville	Local Rural Activity Centre	-	-	-
Cooyar	Local Rural Activity Centre	-	-	-
Quinalow	Local Rural Activity Centre	-	-	-
Kulpi	Local Rural Activity Centre	-	-	-
Haden	Local Rural Activity Centre	-	-	-
Hampton	Local Rural Activity Centre	-	-	-
Jondaryan	Local Rural Activity Centre	-	-	-
Meringandan West	Local Rural Activity Centre	-	-	-
Meringandan	Local Rural Activity Centre	-	-	-
Cecil Plains	Local Rural Activity Centre	-	-	-
Mt Tyson	Local Rural Activity Centre	-	-	-
Southbrook	Local Rural Activity Centre	-	-	-
Brookstead	Local Rural Activity Centre	-	-	-
Nobby	Local Rural Activity Centre	-	-	-

Note: The figures presented in this table are over and above existing approvals, except in the case of Harlaxton.
Source: Economic Associates estimates

7.2 Additional Land Requirements

As outlined in Section 7.1 above, the localities requiring additional zoned land to 2031 are outlined below. Additional land requirements have assumed a site cover of 30%-50%:

- Toowoomba City bulky goods precinct: Identification of ~7.6-12.7 hectare site to accommodate 38,000m² of additional bulky goods demand at a new centre within Toowoomba City, potentially within the mixed use zone of the Toowoomba CBD;

- Glenvale: Identification of ~1.4-2.4 hectares of additional land to accommodate approximately 7,150m² of retail and commercial office development over and above existing approvals;
- Westbrook: Identification of ~1.2-2.3 hectares of additional land to accommodate approximately 9,200m² of retail and commercial office development (currently only 0.5 hectares in centres zone remaining);
- Cambooya: Identification of ~1.5-2.5 hectares of additional land to accommodate approximately 7,550m² of retail and commercial office development (retail and commercial office floor space currently accommodated within the township zone);
- Wyreema: Identification of ~0.7-1.2 hectares of additional land to accommodate approximately 3,450m² of retail and commercial office development (retail and commercial office floor space currently accommodated within the township zone); and
- Greenmount: Identification of ~0.9-1.4 hectares of additional land to accommodate approximately 4,200m² of retail and commercial office development (retail and commercial office floor space currently accommodated within the township zone).

7.3 Policy Implications

The findings of the retail and commercial office analysis indicate that there is an oversupply of traditional retail floor space within Toowoomba City, particularly in the clothing, footwear & apparel and personal & other goods categories. This oversupply could be largely attributable to discount department store, mini major and non-food specialty floor space.

The specific location of the oversupply, that is whether in the Major Centres or the CBD, is difficult to ascertain due to the relatively compact form of Toowoomba City. The distribution of major retail tenants throughout Toowoomba City and its compact form tend to suggest that Toowoomba City is generally perceived as a single retail market in terms of higher order retailing by both consumers and tenants alike.

While it is difficult to ascertain the location of the oversupply of traditional retail floor space within Toowoomba City, it is apparent that the impact of this oversupply is being largely sustained by the Main Street retail environment of Toowoomba CBD. This is evidenced by the lower standard of retail tenancies offered and the proliferation of low rent tenancies, such as discount variety stores, thrift shops and adult shops within the Main Street environment of the CBD core and mixed use precinct.

As such, a rebalancing of the Toowoomba City retail network appears necessary, placing a greater emphasis on the CBD, particularly the core precinct, for any major expansions in the provision of department store, discount department store, mini major or non-food specialty floor space, as opposed to the Major Centres.

This would suggest that future growth or redevelopment in the Major Centres should largely be limited to providing:

- Bulky goods floor space;
- Food based retailing;
- Dining and take-away food;
- Non-retail lifestyle based activities (e.g. gyms); and/or

- More efficient centre layouts.

It follows that District and Local Centres should not ascend the hierarchy to Major Centres for at least the life of the current planning scheme, if not the life of the next planning scheme.

The ongoing development of convenience based retailing within Toowoomba City should be encouraged in locations where gaps in provision exist. Convenience based retailing can be considered to include centre developments up to supermarket anchored shopping centres (<5,000m², anchored by a supermarket of <3,500m²).

Analysis in previous sections of this study indicate that there is a significant undersupply of bulky goods floor space within Toowoomba City, even after allowing for significant and ongoing leakage of bulky goods expenditure outside the Toowoomba region. While supply additions at Major Centres and within the CBD (most appropriately the Mixed Use precinct) would alleviate some of this undersupply, there remains a need to investigate an appropriate location for a bulky goods centre within or proximate to Toowoomba City to meet the region's burgeoning bulky goods needs.

Table 7.1 above outlines future parameters for centre expansions. However the immediately subsequent sections provide additional discussion of policy implications raised above.

7.3.1 Potential Policy Responses

The following sections provide discussion of issues implied above and potential policy responses to those issues.

Rebalancing the Toowoomba City Retail Network

As stated above, the Toowoomba City retail network appears out of balance, with retail need analysis indicating that there is an oversupply of traditional retail floor, particularly in the clothing, footwear & apparel and personal & other goods categories. Oversupply in these categories can be largely attributable to discount department store, mini major and non-food specialty floor space.

The exact location or cause of the oversupply in these retail categories is difficult to pinpoint because of the singular perception of the Toowoomba City higher order retail network. That is, consumers are likely to search throughout Toowoomba City for higher order comparison purchases, comparing price, quality, design, colour, etc. However, despite the imprecision in identifying a cause, the effect of the oversupply is obviously an adverse impact on Toowoomba CBD.

To address the imbalance it is recommended that no further expansion of Major Centres in the form of additional department stores, discount department stores, mini majors and non-food specialty floor space be permitted. As such, expansion of Major centres would be limited to providing:

- Bulky goods floor space;
- Food based retailing;
- Dining and take-away food;
- Non-retail lifestyle based activities (e.g. gyms); and/or

- More efficient centre layouts.

Reconfiguration of a Major Centre to enhance its layout may yield additional floor space, however we would recommend that any additional floor space take the form of:

- Expanded supermarket retailing;
- Dining and take-away food precincts; and
- Food based specialties.

Adoption of a Overwhelming Community Need Test

Planning schemes can rarely effect an absolute prohibition on certain forms of centre development within designated centre precincts, with applicants always able to resort to demonstrating sufficient grounds to address conflicts. Hence, an appropriate policy response is to highlight the significance of the conflict, thereby heightening the sufficient grounds that must be demonstrated.

The current (2013) Logan scheme provides a sample of a suitable policy response. The Logan scheme articulates overwhelming community and overwhelming economic need tests for out of centre development, articulated below:

“overwhelming community need in relation to a development means the circumstances where –

- A) the community would experience an extremely large adverse economic, social and environmental impact if the development were not to proceed; and
- B) the development would provide extremely large overall social, economic and environmental benefits to the community; and
- C) the development cannot be accommodated in the locality, zone and sub-area intended for the development within the life of the planning scheme as a result of its locational requirements or environment effects; and
- D) the development would be consistent with the character and amenity of the existing and future development of the locality, zone and sub-area in which it is proposed to be located; and
- E) the development cannot be located on an equally viable alternative site which is better suited to the development; and
- F) there is no prudent and feasible alternative to the carrying out of the development.

overwhelming economic need in relation to development means the circumstances where –

- A) the development will not have an extremely large adverse effect on the economic viability of an existing development; and
- B) the community would experience an extremely large adverse economic impact if the development were not to proceed.”

These tests set a very high bar demonstrating sufficient grounds for out-of-centre development. There may be scope to consider such a test with regards to certain types of expansions at Major Centres within Toowoomba City. If such a test were applied it is recommended that it be limited

to department stores, discount department stores and mini majors at centres outside the CBD. The effect of this test would be to redirect developer interest towards those activities that Council endorses at Major Centres and/or redirect department store, discount department store, mini major and non-food specialty activity towards the CBD.

Amending Intended Outcomes for Major Centres

The above approach would represent a highly interventionist approach. Alternatively, Council could include an amendment to its planning scheme whereby the outcomes for the Major Centres are revised to state that the Major Centres are not to accommodate any additional Department Store, Discount Department Store, Discount Variety Store or Mini Major floor space. Limits could be imposed on non-food specialties, however it is likely that limits on the major tenancies would impose a de facto restriction on the development feasibility of additional non-food specialty floor space.

Additionally, the revised Major Centre outcomes could include a statement in support of bulky goods, lifestyle uses (e.g. gyms), dining and food retailing related expansions.

Provision of Mini-Major and Non-Food Specialty Activity at Neighbourhood, Local or District Centres

Mini Majors are occasionally found in larger supermarket anchored centres, typically in the form of discount pharmacies. While the imposition of restrictions on Mini Major floor space in Neighbourhood, Local or District Centres may be appropriate it is unlikely that market would pursue the provision of significant mini major floor space in such centres, and existing planning provisions already in place appear sufficient in managing this type of development in lower order centres.

The issue of non-food specialty tenancies can similarly be left to market forces and existing planning controls, with non-food specialty tenancies typically avoiding lower order centres because of a lack of critical mass.

Expansion of Centre Activities within the CBD

QIC has lodged a development application for a major expansion of retail floor space within the Toowoomba CBD across the Grand Central and Gardentown sites. It is highly likely that this expansion will have a significant impact on Main Street CBD retailers and the Major Centres.

Impacts on Major Centres are likely to partly represent the rebalancing of the Toowoomba City retail network in favour of the Toowoomba CBD. The ongoing development and reinforcing of the CBD has been a long term policy of the Toowoomba Regional Council and former Toowoomba City Council. No evidence has emerged during the course of this study to indicate this policy should be amended.

Mitigation of QIC Expansion Impacts on CBD Main Street Retailers

As stated above, the impact of the QIC expansion on main street retailers is likely to be significant. Having said this, both Grand Central and Gardentown are located within the Toowoomba CBD Core. Hence, while Council may be concerned about these impacts there would appear to be limited grounds to refuse the expansion on the basis of impact within the CBD. Similarly, such a move could potentially discourage major investment within the CBD,

with prospective developers uncertain of the scale of development that would be supported by Council. Rather than perceiving the proposed expansion as a threat, Council could seek to leverage off potential opportunities. Major private sector investment within the CBD supported by complementary investments by Council in the main street realm would serve to bolster confidence.

Hence, it is recommended that Council coincide any CBD streetscape works or redevelopment of Council precincts with redevelopment of Grand Central and Gardentown to the extent allowed by physical constraints (e.g. disturbance, traffic impacts, etc). Additionally, it is recommended that the location and scale of Council investments be notified in advance to allow the possible scheduling of additional private sector investment.

Increasing Convenience Based Floor Space Provision

In a planning need context, enhancing convenience based opportunities is a fundamental priority. Convenience based retailing caters to those most commonly made shopping trips and meets those needs that emerge when time is at a premium for consumers. As such, a dispersed network of convenience based centres typically enhances community benefit moreso than say a constrained network of larger centres.

Strategic studies such as this are unable to identify small area needs that are typically met by Neighbourhood Centres. Neighbourhood Centres generally comprise limited line supermarkets (or food stores), specialty food (e.g. bakers, greengrocers) and dining & take-away food. Council has adopted a policy of assessing any applications for additional neighbourhood centres on their merits as and when applications are made. It is recommended that this approach continue with a view to facilitating increased convenience throughout the broader region.

Bulky Goods Retailing

The analysis in previous sections of this report demonstrates that the Toowoomba region, and particularly Toowoomba City is experiencing a shortage of bulky goods floor space. Projections indicate that this shortage will worsen over time.

Expansion of Major Centres and the CBD Mixed Use precinct represent potential opportunity areas to accommodate additional bulky goods floor space within Toowoomba City to address the existing and projected shortages. However these expansions are likely to be incremental and probably insufficient to accommodate the broader needs of Toowoomba City, the Toowoomba region or its hinterland.

As such, it is recommended that investigations be undertaken to identify a potential site or general location for bulky goods retailing within or proximate to Toowoomba City. The regional role of such a centre means that while a site within Toowoomba City (ideally within Mixed Use Zone) would be preferred, a site outside, but proximate to Toowoomba City may be satisfactory.

Given the centre's regional role it would be appropriate for it to be located on or near one of the major highway corridors converging on Toowoomba (i.e. New England Highway, Gore Highway and Warrego Highway).

A stand-alone bulky goods centre would generally comprise at least 25,000m² of floor space. Hence, a *minimum* threshold for an appropriate site would be five hectares. Potential locations that warrant investigation could include:

- Gasworks site;
- Surplus land assembled by QIC south of Hill Street;
- Foundry site;
- Charlton;
- Toowoomba Airport (long term and only if Wellcamp regional airport proceeds); and
- Torrington (land bounded by Boundary Road, Hursley Road, Carrington Road and MacDougall Street).

New Harlaxton Centre

Council has granted a number of approvals in the vicinity of intersection of North Street and the New England Highway, including a supermarket anchored centre, Aldi supermarket and take-away food outlets. The combined effect of these approvals is the establishment of a District Centre at Harlaxton. These approvals have been granted in a short space of time. It is recommended that current approvals represent the extent of permitted centre activities at Harlaxton, with no additional floor space approved until existing approvals have been taken up and trading commences (or the approvals lapse). Consistent with the findings of the 2009 Activity Centres Study, no additional demand has been allocated to the Harlaxton centre over and above existing approvals.

Active Frontages in Mixed Use Developments

Council has received a number of development applications in recent years seeking approval for multi-unit dwellings supported by ground floor retail or commercial. In many instances the ground floor retail can be a trigger for considering the development as being out-of-centre. Typically, the retail component is included as a means of providing active ground floor frontages. Ground floor dwellings in multi-level unit developments can be viewed as inferior on privacy and security grounds.

Concerns relating to out-of-centre development largely relate to the threat posed by mixed use development to the orderly development of the intended centres network. However, the retail floor space proposed in largely residential developments is typically of a scale or nature that has little to no potential to impact the centres network.

As such it is recommended that retail or commercial floor space where provided at ground level as part of a largely residential development be made Code Assessable when the total areas of retail or commercial floor space does not exceed 1,000m² and no individual tenancy exceeds 250m².

It may be appropriate to revise the above parameters, however the intention would be to identify that level of retail or commercial development that would not have any material impact on the centres network. The benefit of this approach is to reduce the burden on applicants to demonstrate need for components that are unlikely to have any material impact on the centres network and reduce development assessment burden caused by a component of a development that is largely ancillary.

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APPENDIX A

LAND USE AND FLOOR SPACE SURVEY

Table A.1: Centre Activity within the Toowoomba CBD Core and Mixed Use Zone, 2013

	Toowoomba CBD	Homemakers Centre	Hoopers Centre	Australian Arcade	Heritage Plaza Arcade	Grand Central	Gardentown	Remainder of CBD	CBD Core	CBD Mixed Use Zone
Floor space Survey (sqm)										
Retailing										
Supermarket & Grocery Stores	6,452	0	0	0	0	3,564	2,178	710	5,742	710
Multi functional General Stores	304	0	0	0	0	0	0	304	304	0
Specialised Food Retailing	8,057	0	2,124	0	0	146	0	5,787	3,909	4,148
Furniture, Floor Coverings, Housewares & Textile Goods Retailing	14,841	1,722	0	0	0	476	330	12,313	9,474	5,367
Electrical & Electrical Goods Retailing	5,273	420	150	0	0	265	202	4,236	3,040	2,233
Hardware, Building & Garden Supplies Retailing	5,731	420	0	0	0	0	0	5,311	211	5,520
Recreational Goods Retailing	10,911	210	0	0	0	755	80	9,866	5,022	5,889
Clothing, Footwear & Personal Accessory Retailing	21,785	0	0	363	0	7,186	1,764	12,472	18,468	3,317
Department Stores	27,110	0	0	0	0	22,994	750	3,366	25,640	1,470
Pharmaceutical and Other Store Based Retailing	20,258	0	689	153	0	4,950	1,519	12,947	17,390	2,868
Cafes, Restaurants & Takeaway Food Services	22,950	0	328	170	0	1,139	695	20,618	14,961	7,989
Video Stores	900	0	0	0	0	0	0	900	0	900
Hair & Beauty Salons	6,270	420	195	112	0	624	312	4,607	4,996	1,274
Personal Services (includes Laundromat, Dry Cleaners & Photographic Film Processing)	9,208	210	0	28	0	739	0	8,231	7,272	1,936
Motor Vehicle Retailing	0	0	0	0	0	0	0	0	0	0
Motor Vehicle Parts & Tyre Retailing	5,025	0	0	0	0	0	0	5,025	310	4,715
Fuel Retailing (Service Stations)	240	0	0	0	0	0	0	240	0	240
Sub Total Retailing	165,315	3,402	3,486	826	0	42,838	7,830	106,933	116,739	48,576
Traditional Retailing (less 14-17)	150,842	3,192	3,486	798	0	42,099	7,830	93,437	109,157	41,685
Commercial & Medical										
Finance (including Banks) & Insurance	29,113	0	0	99	600	422	96	27,896	21,590	7,523
Real Estate Agency	6,356	0	0	0	0	0	0	6,356	2,774	3,582
Professional & Other Commercial Office Based Services	93,880	1,282	0	0	1,400	36	0	91,162	64,527	29,353
Medical & Other Health Care Services	13,324	420	364	16	0	324	84	12,116	7,575	5,749
Veterinary Services	80	0	0	0	0	0	0	80	0	80
Sub Total Commercial & Medical	142,754	1,702	364	115	2,000	782	180	137,611	96,467	46,287
Pubs, Taverns, Bars & Clubs (No.)	10	0	0	0	0	0	0	0	8	2
Post Office (No.)	0	0	0	0	0	0	0	0	0	0
Community & Other										
Public Administration & Safety	52,788	0	0	0	0	90	0	52,698	44,494	8,294
Education & Training Facilities	2,435	0	0	0	0	0	0	2,435	960	1,475
Arts & Recreational Facilities	11,366	0	0	28	0	0	0	11,338	10,076	1,290
Other Services (including Repair & Maintenance, Interest Groups, etc)	1,234	0	0	0	0	0	0	1,234	278	956
Sub Total Community & Other										
Childcare Centres (No.)	2	0	0	0	0	0	0	0	1	1
Community Halls, Cultural & Community Centres (No.)	1	0	0	0	0	0	0	0	1	0
Libraries (No.)	2	0	0	0	0	0	0	0	2	0
Vacant										
Vacant Shopfronts	16,285	210	604	0	0	664	802	14,005	11,670	4,615
Vacant Commercial	19,422	80	150	0	420	0	0	18,772	12,244	7,178
Grand Total	411,599	5,394	4,604	969	2,420	44,374	8,812	345,026	292,928	118,671
									71.2%	28.8%
Floor space Survey (%)										
Retailing										
Supermarket & Grocery Stores	1.6%	0.0%	0.0%	0.0%	0.0%	8.0%	24.7%	0.2%	2.0%	0.6%
Multi functional General Stores	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%
Specialised Food Retailing	2.0%	0.0%	46.1%	0.0%	0.0%	0.3%	0.0%	1.7%	1.3%	3.5%
Furniture, Floor Coverings, Housewares & Textile Goods Retailing	3.6%	31.9%	0.0%	0.0%	0.0%	1.1%	3.7%	3.6%	3.2%	4.5%
Electrical & Electrical Goods Retailing	1.3%	7.8%	3.3%	0.0%	0.0%	0.6%	2.3%	1.2%	1.0%	1.9%
Hardware, Building & Garden Supplies Retailing	1.4%	7.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.1%	4.7%

	Toowoomba CBD	Homemakers Centre	Hoopers Centre	Australian Arcade	Heritage Plaza Arcade	Grand Central	Gardentown	Remainder of CBD	CBD Core	CBD Mixed Use Zone
Recreational Goods Retailing	2.7%	3.9%	0.0%	0.0%	0.0%	1.7%	0.9%	2.9%	1.7%	5.0%
Clothing, Footwear & Personal Accessory Retailing	5.3%	0.0%	0.0%	37.5%	0.0%	16.2%	20.0%	3.6%	6.3%	2.8%
Department Stores	6.6%	0.0%	0.0%	0.0%	0.0%	51.8%	8.5%	1.0%	8.8%	1.2%
Pharmaceutical and Other StoreBased Retailing	4.9%	0.0%	15.0%	15.8%	0.0%	11.2%	17.2%	3.8%	5.9%	2.4%
Cafes, Restaurants & Takeaway Food Services	5.6%	0.0%	7.1%	17.5%	0.0%	2.6%	7.9%	6.0%	5.1%	6.7%
Video Stores	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.8%
Hair & Beauty Salons	1.5%	7.8%	4.2%	11.6%	0.0%	1.4%	3.5%	1.3%	1.7%	1.1%
Personal Services (includes Laundromat, Dry Cleaners & Photographic Film Processing)	2.2%	3.9%	0.0%	2.9%	0.0%	1.7%	0.0%	2.4%	2.5%	1.6%
Motor Vehicle Retailing	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Motor Vehicle Parts & Tyre Retailing	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.1%	4.0%
Fuel Retailing (Service Stations)	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%
Sub Total Retailing	40.2%	63.1%	75.7%	85.2%	0.0%	96.5%	88.9%	31.0%	39.9%	40.9%
<i>Commercial & Medical</i>										
Finance (including Banks) & Insurance	7.1%	0.0%	0.0%	10.2%	24.8%	1.0%	1.1%	8.1%	7.4%	6.3%
Real Estate Agency	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.9%	3.0%
Professional & Other Commercial Office Based Services	22.8%	23.8%	0.0%	0.0%	57.9%	0.1%	0.0%	26.4%	22.0%	24.7%
Medical & Other Health Care Services	3.2%	7.8%	7.9%	1.7%	0.0%	0.7%	1.0%	3.5%	2.6%	4.8%
Veterinary Services	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub Total Commercial & Medical	34.7%	31.6%	7.9%	11.9%	82.6%	1.8%	2.0%	39.9%	32.9%	39.0%
<i>Community & Other</i>										
Public Administration & Safety	12.8%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	15.3%	15.2%	7.0%
Education & Training Facilities	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.3%	1.2%
Arts & Recreational Facilities	2.8%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	3.3%	3.4%	1.1%
Other Services (including Repair & Maintenance, Interest Groups, etc)	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.1%	0.8%
Sub Total Community & Other	16.5%	0.0%	0.0%	2.9%	0.0%	0.2%	0.0%	19.6%	19.1%	10.1%
Vacant										
Vacant Shopfronts	4.0%	3.9%	13.1%	0.0%	0.0%	1.5%	9.1%	4.1%	4.0%	3.9%
Vacant Commercial	4.7%	1.5%	3.3%	0.0%	17.4%	0.0%	0.0%	5.4%	4.2%	6.0%
Grand Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note 1: The Toowoomba CBD is comprised of the Homemakers Centre, Hoopers Centre, Australian Arcade, Heritage Plaza Arcade, Grand Central, Gardentown and floorspace within the remainder of the CBD. The Toowoomba CBD is comprised of the CBD Core and CBD Mixed Use Zone.

Note 2: The public administration & safety category includes government office space.

Source: Economic Associates inventory, March 2013

Table A.2: Centre Activity within the Remainder of Toowoomba City - Part 1

[illegible]

	Major Centres			Other Centres in Toowoomba City																									
	Kearney Springs	Clifford Gardens	Wilsonton	Harlaxton	North Ridge	Northlands	Wyalla Plaza	TOR Centre	Newtown Parkside	Mort Estate	Newtown Shopping Centre	Mary Street Village	MacKenzie Row	Glenvale Plus	Harristown	Tower Shopping Village	South Toowoomba	Ruthven Central	Southtown Shopping Centre	The Range	High Street Plaza	Drayton	MacDonald Town	West Ridge	Middle Ridge Village	Southridge on MacKenzie	Uni Plaza	Bridge Street Plaza	Bunnings
Department Stores	16%	26%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
Pharmaceutical and Other Store0Based Retailing	14%	3%	10%	0%	0%	18%	12%	0%	9%	24%	24%	0%	0%	0%	0%	15%	0%	39%	10%	6%	4%	0%	6%	13%	6%	0%	7%	7%	0%
Cafes, Restaurants & Takeaway Food Services	6%	3%	13%	14%	0%	5%	15%	44%	13%	23%	3%	34%	0%	0%	0%	0%	70%	23%	15%	2%	5%	11%	0%	18%	0%	0%	8%	0%	0%
Video Stores	0%	0%	2%	0%	0%	0%	10%	0%	0%	0%	18%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	11%	0%	0%	0%	0%	0%
Hair & Beauty Salons	1%	2%	0%	0%	13%	4%	1%	0%	4%	6%	6%	19%	0%	13%	0%	11%	0%	8%	2%	3%	2%	11%	8%	4%	17%	8%	6%	5%	0%
Personal Services (includes Laundromat, Dry Cleaners & Photographic Film Processing)	1%	0%	1%	11%	0%	0%	1%	7%	0%	6%	1%	0%	0%	0%	0%	0%	0%	0%	5%	0%	0%	11%	0%	5%	0%	0%	4%	0%	0%
Motor Vehicle Retailing	0%	8%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Motor Vehicle Parts & Tyre Retailing	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Fuel Retailing (Service Stations)	1%	1%	0%	0%	0%	0%	7%	18%	0%	0%	0%	24%	0%	0%	0%	0%	7%	0%	0%	2%	2%	38%	0%	0%	0%	0%	0%	0%	0%
Sub0Total Retailing	92%	92%	86%	100%	87%	67%	92%	100%	63%	100%	90%	100%	100%	100%	63%	100%	78%	88%	65%	84%	77%	100%	14%	87%	61%	59%	67%	100%	100%
Commercial & Medical																													
Finance (including Banks) & Insurance	1%	4%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	37%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Real Estate Agency	0%	0%	1%	0%	0%	0%	2%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	2%	2%	0%	0%	4%	0%	5%	8%	0%	0%
Professional & Other Commercial Office Based Services	1%	1%	1%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	9%	1%	18%	0%	5%	0%	0%	0%	5%	0%	0%
Medical & Other Health Care Services	0%	2%	5%	0%	0%	0%	3%	0%	12%	0%	1%	0%	0%	0%	0%	0%	0%	0%	5%	6%	2%	0%	36%	7%	33%	0%	7%	0%	0%
Veterinary Services	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sub0Total Commercial & Medical	3%	7%	11%	0%	0%	0%	8%	0%	12%	0%	3%	0%	0%	0%	37%	0%	0%	0%	14%	14%	22%	0%	41%	11%	33%	5%	20%	0%	0%
Community & Other																													
Public Administration & Safety	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Education & Training Facilities	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%
Arts & Recreational Facilities	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%	31%	0%	0%	0%
Other Services (including Repair & Maintenance, Interest Groups, etc)	0%	0%	0%	0%	0%	23%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Sub0Total Community & Other	2%	1%	0%	0%	0%	23%	0%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	10%	0%	0%	0%	0%	0%	0%	36%	0%	0%	0%
Vacant																													
Vacant Shopfronts	3%	0%	2%	0%	13%	10%	0%	0%	25%	0%	3%	0%	0%	0%	0%	0%	22%	12%	11%	2%	2%	0%	44%	2%	5%	0%	13%	0%	0%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note; The public administration & safety category includes government office space.
Source: Economic Associates inventory, March 2013

Table A.3: Centre Activity within the Remainder of Toowoomba City - Part 2 (Retail Activity Outside Centre Zone as of 2013 Activity Study)

	Dan Murphy's Geddes Street	Water St South	Cnr Herries/West Sts	Bridge St Cnr Holberton Street	Cnr Bridge/Richmond Sts	Cnr Diagonal/Stephens Sts	Pechey St	Cnr Jellicoe/Kenilworth St	Jellicoe St	Cnr Ruthven/North Sts	Cnr Ruthven/Newington Sts	Fantastic Furniture	Freighter St	McDougall St	Carrol St	Warrego Hwy	Gore Hwy	Cnr Alderley/Butt Sts	Cnr Alderley/Gunn Sts	Cnr Alderley/Ramsey Sts	Cnr Port/Ramsey Sts	Batterbee St	West St	Cnr Russel/Mort Sts	Bermoth Centre & Surrounds
Land Use Survey (Ha)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Centre Activity within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
House (inconsistent Use) within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Industrial Activity & Other Underutilised Use within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Vacant Lot within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Centre Zone Area	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Other Adjacent to Centre Activities	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Activity within Township Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Grand Total	1.1	0.2	0.2	1.0	0.2	0.3	0.3	0.4	0.3	1.7	0.6	1.0	1.4	0.1	0.6	0.1	6.5	0.1	0.1	0.1	0.1	0.3	0.2	0.2	3.0
Land Use Survey (%)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Centre Activity within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
House (inconsistent Use) within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Industrial Activity & Other Underutilised Use within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Vacant Lot within Centre Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Total Centre Zone Area	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Other Adjacent to Centre Activities	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Activity within Township Zone	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Floorspace Survey (sqm)																									
Retailing																									
Supermarket & Grocery Stores	0	0	0	250	0	0	0	120	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Multi functional General Stores	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Specialised Food Retailing	1,615	0	0	0	0	0	0	0	0	140	390	0	0	80	0	0	540	0	80	0	0	0	0	0	0
Furniture, Floor Coverings, Houseware & Textile Goods Retailing	0	430	0	180	0	680	510	0	210	0	510	7,100	840	0	350	0	480	0	0	0	0	0	0	0	9,500
Electrical & Electrical Goods Retailing	0	0	0	80	0	0	0	140	90	0	0	0	0	0	0	0	140	0	0	0	0	0	0	0	560
Hardware, Building & Garden Supplies Retailing	0	0	0	0	0	0	0	0	0	0	0	0	120	0	0	0	0	0	0	0	0	0	0	0	0
Recreational Goods Retailing	0	0	0	0	0	0	0	0	0	0	0	0	330	0	0	0	300	0	0	0	0	0	0	0	720
Clothing, Footwear & Personal Accessory Retailing	0	0	0	230	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Department Stores	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Pharmaceutical and Other Store Based Retailing	0	120	0	60	0	0	340	0	0	100	90	0	370	0	100	0	480	0	80	0	0	160	0	0	1,410
Cafes, Restaurants & Takeaway Food Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Video Stores	0	0	0	0	0	0	0	0	0	380	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hair & Beauty Salons	0	0	0	160	0	0	0	0	0	0	50	0	0	0	0	0	0	0	0	0	0	0	60	0	0
Personal Services (includes Laundromat, Dry Cleaners & Photographic Film Processing)	0	0	0	0	0	0	0	0	0	80	0	0	0	0	80	0	0	0	0	0	0	0	0	0	400
Motor Vehicle Retailing	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	280	0	0	0	0	0	0	0	0
Motor Vehicle Parts & Tyre Retailing	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	250	0	0	0	0	0	0	0	150
Fuel Retailing (Service Stations)	0	0	0	80	0	0	0	0	0	80	0	0	0	0	0	0	120	0	0	0	0	0	0	0	0
Sub Total Retailing	1,615	550	0	1,040	0	680	850	260	300	780	1,040	7,100	1,660	80	530	0	2,590	0	160	0	0	160	60	0	12,740
Traditional Retail (less 14-17)	1,615	550	0	960	0	680	850	260	300	620	1,040	7,100	1,660	80	450	0	1,940	0	160	0	0	160	60	0	12,190
Commercial & Medical																									
Finance (including Banks) & Insurance	0	0	0	0	120	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Real Estate Agency	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	120	0	0	0	0	0	0	0	0	0
Professional & Other Commercial Office Based Services	0	350	0	200	0	0	0	0	0	0	0	0	0	0	0	0	960	150	0	0	0	0	0	0	0
Medical & Other Health Care Services	0	0	0	0	100	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	200	0	120	0	0
Veterinary Services	0	0	150	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	180	0	80	80	0	0
Sub Total Commercial & Medical	0	350	150	200	220	0	0	0	0	0	0	0	0	0	0	120	960	150	0	180	0	280	80	120	0
Pubs, Taverns, Bars & Clubs (No.)	1	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	1	0	0	0	0	0	0	0	0
Post Office (No.)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Community & Other																									
Public Administration & Safety	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

	Dan Murphy's Geddes Street	Water St South	Cnr Herries/West Sts	Bridge St Cnr Holberton Street	Cnr Bridge/Richmond Sts	Cnr Diagonal/Stephens Sts	Pechey St	Cnr Jellicoe/Kenilworth St	Jellicoe St	Cnr Ruthven/North Sts	Cnr Ruthven/Newington Sts	Fantastic Furniture	Freighter St	McDougall St	Carrol St	Warrego Hwy	Gore Hwy	Cnr Alderley/Butt Sts	Cnr Alderley/Gunn Sts	Cnr Alderley/Ramsey Sts	Cnr Port/Ramsey Sts	Batterbee St	West St	Cnr Russel/Mort Sts	Bermoth Centre & Surrounds
Pharmaceutical and Other StoreBased Retailing	0%	11%	0%	5%	0%	0%	40%	0%	0%	13%	9%	0%	19%	0%	19%	0%	6%	0%	50%	0%	0%	36%	0%	0%	10%
Cafes, Restaurants & Takeaway Food Services	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Video Stores	0%	0%	0%	0%	0%	0%	0%	0%	0%	49%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Hair & Beauty Salons	0%	0%	0%	12%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	30%	0%	0%	0%
Personal Services (includes Laundromat, Dry Cleaners & Photographic Film Processing)	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	0%	0%	0%	0%	15%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%
Motor Vehicle Retailing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%
Motor Vehicle Parts & Tyre Retailing	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	1%
Fuel Retailing (Service Stations)	0%	0%	0%	6%	0%	0%	0%	0%	0%	10%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%
Sub0Total Retailing	100%	49%	0%	81%	0%	100%	100%	41%	100%	100%	100%	100%	86%	100%	100%	0%	30%	0%	100%	0%	0%	36%	30%	0%	86%
Commercial & Medical																									
Finance (including Banks) & Insurance	0%	0%	0%	0%	55%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Real Estate Agency	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Professional & Other Commercial Office Based Services	0%	31%	0%	16%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	11%	100%	0%	0%	0%	0%	0%	0%	0%
Medical & Other Health Care Services	0%	0%	0%	0%	45%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	45%	0%	100%	0%	0%
Veterinary Services	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	18%	40%	0%	0%	0%
Sub0Total Commercial & Medical	0%	31%	100%	16%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	11%	100%	0%	100%	0%	64%	40%	100%	0%
Community & Other																									
Public Administration & Safety	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Education & Training Facilities	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Arts & Recreational Facilities	0%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	6%
Other Services (including Repair & Maintenance, Interest Groups, etc)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	30%	0%	0%	4%
Sub0Total Community & Other	0%	20%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	100%	0%	30%	0%	0%	10%
Vacant																									
Vacant Shopfronts	0%	0%	0%	4%	0%	0%	0%	59%	0%	0%	0%	0%	14%	0%	0%	0%	59%	0%	0%	0%	0%	0%	0%	0%	4%
Grand Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Note; The public administration & safety category includes government office space.
Source: Economic Associates inventory, March 2013

Table A.3: Centre Activity within the Remainder of Toowoomba Regional Council

Former Local Government Area	Crows Nest							Rosalie												Jondaryan		Pittsworth				Millmerran		Cambooya					Clifton				
	Hadén	Highfields Village Shopping Centre	Highfield Plaza	Meringandan	Hampton	Crows Nest	Carbarish (Tourist Zone)	Merringandan West	Kingsthorpe	Gowrie Junction	Acland	Bowenville	Cooyar	Goombungee	Kulpi	Macalagan	Peranga	Quinalow	Yarraman	Oakey	Jondaryan	Pittsworth	Southbrook	Brookstead	Mt Tyson	Millmerran	Cecil Plains	Cambooya	Wyreema	Greenmount	East Greenmount	Westbrook	Clifton	Nobby			
Land Use Survey (Ha)																																					
Centre Activity within Centre Zone	0.2	4.8	1.8	0.4	0.5	3.5	0.0	0.4	0.5	0.4	0.1	0.7	0.8	1.3	0.7	0.3	0.3	1.1	2.8	6.3	0.0	7.9	0.5	0.4	0.2	5.8	0.5	0.0	0.0	0.0	0.0	0.0	4.6	0.0			
House (Inconsistent Use) within Centre Zone	1.1	3.9	0.0	4.6	4.5	0.2	0.0	0.0	1.5	0.0	0.2	0.0	0.9	0.9	0.0	0.3	0.4	0.4	1.6	0.8	0.0	1.2	0.5	0.0	0.1	1.4	0.2	0.0	0.0	0.0	0.0	0.0	2.8	0.0			
Industrial Activity & Other Underutilised Use within Centre Zone	0.0	10.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.7	0.4	0.1	0.4	1.4	0.0	1.3	0.0	0.0	0.4	0.0	0.9	0.0	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	1.6	0.0			
Vacant Lot within Centre Zone	0.1	0.9	0.0	0.5	5.5	0.2	0.0	0.4	2.7	1.4	0.0	0.0	0.2	0.2	0.0	0.0	0.0	1.4	1.1	0.2	0.0	1.0	0.0	0.0	0.0	0.5	0.2	0.0	0.0	0.0	0.0	0.5	0.4	0.0			
Total Centre Zone Area	1.4	19.5	1.8	5.5	10.5	4.2	0.0	0.8	4.7	1.8	1.0	1.1	2.0	2.8	2.1	0.6	2.0	2.9	5.5	7.7	0.0	11.0	1.0	0.4	0.3	7.9	1.0	0.0	0.0	0.0	0.0	0.5	9.4	0.0			
Other Adjacent to Centre Activities	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Activity within Township Zone	n/a	n/a	n/a	n/a	n/a	n/a	0.0	n/a	1.3	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	1.4	n/a	n/a	n/a	n/a	n/a	n/a	n/a	0.8	0.3	0.8	1.1	1.0	n/a	1.3		
Grand Total	1.4	19.5	1.8	5.5	10.5	4.2	0.0	0.8	4.7	1.8	1.0	1.1	2.0	3.0	2.1	0.6	2.0	2.9	5.6	8.2	1.4	11.0	1.0	0.4	0.3	7.9	1.2	0.8	0.3	0.8	1.1	0.5	9.4	1.3			
Land Use Survey (%)																																					
Centre Activity within Centre Zone	14%	24%	100%	7%	5%	83%	-	51%	11%	22%	10%	64%	40%	43%	33%	50%	15%	37%	50%	77%	0%	72%	53%	100%	55%	74%	42%	0%	0%	0%	0%	0%	49%	0%			
House (Inconsistent Use) within Centre Zone	79%	20%	0%	84%	43%	5%	-	0%	32%	0%	20%	0%	45%	30%	0%	50%	20%	14%	29%	10%	0%	11%	47%	0%	45%	18%	17%	0%	0%	0%	0%	0%	30%	0%			
Industrial Activity & Other Underutilised Use within Centre Zone	0%	51%	0%	0%	0%	7%	-	0%	0%	0%	70%	36%	5%	13%	67%	0%	65%	0%	0%	5%	0%	8%	0%	0%	0%	3%	8%	0%	0%	0%	0%	0%	17%	0%			
Vacant Lot within Centre Zone	7%	4%	0%	9%	52%	5%	-	49%	58%	78%	0%	0%	10%	7%	0%	0%	0%	49%	20%	2%	0%	9%	0%	0%	0%	6%	17%	0%	0%	0%	0%	100%	4%	0%			
Total Centre Zone Area	100	%	100%	100	%	100	-	100	%	100	%	100	%	94%	%	%	%	%	98%	94%	0%	100%	%	%	%	100%	83%	0%	0%	0%	0%	0%	100%	0%			
Other Adjacent to Centre Activities	0%	0%	0%	0%	0%	0%	-	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%	0%	2%	4%	0%	0%	0%	0%	0%	0%	17%	0%	0%	0%	0%	0%	0%	0%			
Activity within Township Zone	n/a	n/a	n/a	n/a	n/a	n/a	-	n/a	22%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	100%	n/a	n/a	n/a	n/a	n/a	n/a	100%	100%	100%	100%	100%	n/a	100%			
Grand Total	100	%	100%	100	%	100	-	100	%	100	%	100	%	100	%	100	%	100	100	100%	%	100%	100	%	100	%	100%	100	%	100	%	100	%	100%	%		
Floorspace Survey (sqm)																																					
Retailing																																					
Supermarket & Grocery Stores	0	3,832	2,700	0	70	1,700	0	0	0	0	0	0	0	0	0	0	0	0	380	3,200	0	5,100	0	0	0	1,020	0	100	0	0	0	300	650	0			
Multi functional General Stores	80	0	0	80	0	0	80	150	430	160	0	60	0	150	0	220	190	0	0	0	0	0	90	110	350	0	120	0	150	90	0	0	0	150			
Specialised Food Retailing	0	480	130	0	0	680	0	0	250	0	0	0	0	0	0	0	0	0	0	1,660	0	640	0	0	0	250	0	0	0	0	0	60	0	0			
Furniture, Floor Coverings, Houseware & Textile Goods Retailing	0	70	0	0	0	800	0	0	0	0	0	0	0	0	0	0	0	0	0	390	0	190	0	0	0	0	0	0	0	0	0	110	0	0			
Electrical & Electrical Goods Retailing	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	350	0	800	0	0	0	0	0	0	0	0	0	0	0	0			
Hardware, Building & Garden Supplies Retailing	0	540	0	0	0	100	0	0	0	0	0	0	0	80	0	0	0	0	0	2,450	0	2,620	0	0	0	1,730	0	0	0	0	0	0	570	0			
Recreational Goods Retailing	0	120	100	0	0	290	0	0	0	0	0	0	0	0	0	0	0	0	0	900	0	400	0	0	0	310	0	0	0	0	0	0	540	0			
Clothing, Footwear & Personal Accessory Retailing	0	0	0	0	0	60	0	0	0	0	0	0	0	310	0	0	0	0	60	360	0	730	0	0	0	0	0	0	0	0	0	230	0	0			
Department Stores	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0				
Pharmaceutical and Other StoreBased Retailing	0	260	160	0	0	320	150	0	160	0	0	0	0	80	0	0	0	0	300	2,470	0	1,080	0	0	0	440	0	160	0	0	0	320	0	0			
Cafes, Restaurants & Takeaway Food Services	0	1,050	310	0	200	250	80	0	80	0	0	0	0	0	0	0	0	0	200	873	0	810	0	0	0	140	0	0	0	0	140	150	0	0			
Video Stores	0	150	0	0	0	100	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	260	0	0	0	0	0	0	0	0	0	0	0	0			
Hair & Beauty Salons	0	70	180	0	0	100	0	0	30	0	0	0	0	0	0	0	0	0	110	378	0	310	0	0	0	250	0	0	0	0	100	0	0	0			
Personal Services (includes Laundromat, Dry Cleaners & Photographic Film Processing)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	60	32	0	140	0	0	0	100	0	0	0	0	0	0	0	0			
Motor Vehicle Retailing	0	0	0	0	0	50	0	0	0	0	0	0	0	0	0	0	0	0	0	400	0	690	0	0	0	0	0	0	0	0	0	0	0	0			
Motor Vehicle Parts & Tyre Retailing	0	0	0	0	0	552	0	0	0	0	0	0	0	0	0	0	0	0																			

Former Local Government Area	Crows Nest							Rosalie											Jondaryan		Pittsworth				Millmerran		Cambooya					Clifton		
	Haden	Highfields Village Shopping Centre	Highfield Plaza	Meringanden	Hampton	Crows Nest	Carbarish (Tourist Zone)	Merringandan West	Kingshorpe	Gowrie Junction	Acland	Bowenville	Cooyar	Goombungee	Kulpi	Maclean	Peranga	Quinalow	Yarraman	Oakley	Jondaryan	Pittsworth	Southbrook	Brookstead	Mt Tyson	Millmerran	Cecil Plains	Cambooya	Wyreema	Greenmount	East Greenmount	Westbrook	Clifton	Nobby
Finance (including Banks) & Insurance	0%	1%	7%	0%	0%	6%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	4%	0%	3%	0%	0%	0%	4%	0%	0%	0%	0%	-	0%	6%	0%
Real Estate Agency	0%	0%	4%	55%	12%	1%	0%	0%	3%	0%	0%	0%	0%	6%	0%	0%	0%	0%	8%	2%	0%	2%	0%	0%	0%	2%	16%	17%	0%	0%	-	0%	5%	0%
Professional & Other Commercial Office Based Services	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	2%	0%	4%	0%	0%	0%	0%	0%	10%	0%	0%	-	0%	3%	0%
Medical & Other Health Care Services	0%	2%	9%	0%	0%	0%	0%	0%	23%	0%	0%	0%	0%	6%	0%	0%	0%	0%	4%	4%	0%	2%	0%	0%	0%	3%	0%	0%	0%	0%	-	0%	0%	0%
Veterinary Services	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	2%	0%	0%	1%	0%	0%	0%	2%	0%	0%	0%	0%	-	0%	0%	0%
Sub0Total Commercial & Medical	0%	3%	24%	55%	12%	8%	0%	0%	26%	0%	0%	0%	0%	12%	0%	0%	0%	0%	23%	12%	0%	11%	0%	0%	0%	9%	16%	27%	0%	0%	-	0%	14%	0%
Community & Other																																		
Public Administration & Safety	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%	2%	0%	0%	0%	0%	-	0%	3%	0%
Education & Training Facilities	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	-	0%	0%	0%
Arts & Recreational Facilities	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%	5%	0%	0%	0%	0%	0%	0%	0%	0%	-	0%	0%	64%
Other Services (including Repair & Maintenance, Interest Groups, etc)	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	65%	0%	11%	0%	0%	0%	0%	0%	5%	0%	5%	0%	0%	0%	1%	0%	15%	0%	0%	-	0%	2%	0%
Sub0Total Community & Other	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	65%	0%	11%	0%	0%	0%	0%	0%	10%	0%	10%	0%	0%	0%	3%	0%	15%	0%	0%	-	0%	5%	64%
Vacant																																		
Vacant Shopfronts	0%	1%	4%	25%	35%	13%	0%	0%	0%	0%	100%	18%	0%	32%	100%	51%	0%	100%	19%	3%	0%	4%	33%	67%	0%	9%	71%	0%	0%	40%	-	9%	14%	0%
Grand Total	100	100%	100%	100	100	100%	100	100	100%	100	100	100	100	100%	100	100	100	100	100%	100%	100	100%	100	100	100	100%	100	100	100	100	100	100	100	100

Note; The public administration & safety category includes government office space.
Source: Economic Associates inventory, March 2013

APPENDIX B

DETAILED SOCIO-ECONOMIC PROFILES

A socio-economic profile of SLAs within Toowoomba City as at the 2006 and 2011 Censuses of Population and Housing, benchmarked against Toowoomba City, Toowoomba Regional Council and Queensland, is provided in Table B.1 below. A number of key points can be drawn from this profile including:

- In 2011, the population of Toowoomba City was approximately 92,206 persons including:
 - 13,672 persons in Toowoomba Central;
 - 10,291 persons in Toowoomba North-East;
 - 18,593 persons in Toowoomba North-West;
 - 26,522 persons in Toowoomba South-East; and
 - 23,128 persons in Toowoomba West;
- Toowoomba West recorded the highest average annual population growth between 2006 and 2011 at 1.1% per annum. The other SLAs recorded average population growth below 1% per annum;
- The average age of residents in 2011 ranged from 39.6 years (Toowoomba Central) to 36.2 years (Toowoomba North-East), compared with 38.1 years in Toowoomba Regional Council and 38.0 years in Queensland;
- The SLAs of Toowoomba City recorded a significantly higher proportion of lone person households than Brisbane in 2006 and 2011. The average household size decreased between 2006 and 2011 in Toowoomba Central, Toowoomba North-East and Toowoomba West, compared with a moderate increase in Queensland;
- Toowoomba City recorded significantly higher proportion of households renting than Toowoomba Regional Council and Queensland, driven by Toowoomba Central, Toowoomba North-West and Toowoomba West;
- On average, incomes and housing costs (i.e. mortgages and rents) are lower in the SLAs of Toowoomba City than in Queensland. Of the SLAs Toowoomba South-East recorded the highest average income and housing costs;
- Toowoomba North-West recorded the highest unemployment rate within Toowoomba City and was the only SLA to record an unemployment rate above the state average. Toowoomba Central was the only region to record a decline in the unemployment rate between 2006 and 2011; and
- The SLAs of Toowoomba City recorded a higher proportion of persons employed in the education and training, and health care and social assistance industries than Queensland. Toowoomba North-West and Toowoomba West recorded a higher proportion of persons employed in the manufacturing industry than Queensland.

Table B.1: Socio-Economic Profile of Toowoomba City catchments, 2006 and 2011 Censuses

	Toowoomba Central		Toowoomba North-East		Toowoomba North-West		Toowoomba South-East		Toowoomba West		Toowoomba City		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Population	13,795	13,672	10,184	10,291	18,195	18,593	25,716	26,522	21,902	23,128	89,792	92,206	141,021	149,212	3,973,958	4,392,097
Ave. Annual Population Growth	-	-0.2%	-	0.2%	-	0.4%	-	0.6%	-	1.1%	-	0.5%	-	1.1%	-	2.0%
Age Distribution																
0-14 years	18.9%	18.0%	22.7%	21.7%	21.6%	21.4%	19.8%	20.8%	20.9%	20.5%	20.6%	20.5%	22.2%	21.8%	20.4%	20.0%
15-24 years	15.7%	14.2%	14.4%	14.4%	15.3%	14.2%	18.4%	14.4%	17.0%	16.2%	16.6%	14.8%	14.7%	13.6%	13.6%	13.4%
25-34 years	13.0%	13.7%	9.9%	9.3%	13.7%	13.6%	12.3%	13.2%	12.8%	14.2%	12.5%	13.2%	11.8%	11.8%	13.3%	13.4%
35-44 years	12.8%	13.2%	13.4%	13.2%	12.4%	11.7%	11.9%	12.1%	12.1%	11.4%	12.4%	12.2%	13.4%	12.8%	14.6%	14.2%
45-54 years	13.0%	12.8%	13.1%	13.7%	12.5%	12.3%	12.4%	12.2%	11.8%	11.3%	12.4%	12.2%	13.2%	13.1%	13.7%	13.6%
55-64 years	10.4%	11.2%	10.3%	11.7%	11.0%	11.3%	10.4%	11.0%	9.3%	9.7%	10.2%	10.8%	10.8%	11.5%	11.4%	11.7%
65 years and over	16.4%	16.8%	16.2%	15.8%	13.6%	15.5%	14.8%	16.4%	16.0%	16.7%	15.3%	16.3%	13.8%	15.4%	13.0%	13.7%
Average age (years)	38.7	39.6	35.7	36.2	36.7	37.7	37.5	38.4	37.5	37.9	37.6	38.3	37.1	38.1	37.6	38.0
Household Type (% of families)																
Couple families with children	22.3%	20.8%	26.2%	26.1%	25.9%	23.4%	31.0%	29.8%	24.0%	22.3%	26.3%	24.7%	30.8%	29.0%	29.4%	29.5%
Couple families without children	23.8%	23.6%	25.6%	24.5%	25.3%	26.0%	28.6%	29.0%	24.7%	23.5%	25.8%	25.6%	27.8%	28.1%	26.0%	26.6%
Single parent family	11.5%	12.3%	10.1%	10.2%	13.9%	14.2%	9.3%	9.5%	12.5%	12.8%	11.5%	11.8%	10.3%	10.5%	10.5%	10.7%
Lone person	31.9%	33.4%	28.6%	30.5%	26.4%	29.0%	22.5%	23.8%	28.1%	30.9%	26.9%	28.9%	23.1%	24.6%	21.0%	21.4%
Ave. household size	2.5	2.4	2.7	2.6	2.5	2.5	2.7	2.7	2.5	2.4	2.6	2.5	2.7	2.6	2.6	2.7
Household Finances																
% of households fully owning home	29.9%	27.4%	35.1%	32.3%	30.4%	28.9%	35.5%	33.9%	29.9%	26.1%	32.1%	29.7%	34.3%	32.2%	30.4%	28.4%
% of households purchasing home	26.3%	27.5%	28.1%	29.6%	28.1%	28.3%	29.8%	29.4%	27.7%	27.5%	28.2%	28.4%	31.5%	32.0%	31.4%	32.6%
% of households renting	37.4%	39.1%	30.4%	32.6%	35.5%	38.0%	29.6%	30.9%	34.2%	37.5%	33.3%	35.5%	28.3%	29.7%	30.0%	32.0%
Ave. weekly family income	\$796	\$948	\$873	\$1,107	\$808	\$938	\$1,034	\$1,242	\$839	\$1,004	\$874	\$1,046	\$883	\$1,067	\$1,029	\$1,277
Ave. monthly housing loan repayment	\$1,139	\$1,591	\$1,479	\$1,939	\$1,100	\$1,470	\$1,358	\$1,771	\$1,125	\$1,532	\$1,230	\$1,644	\$1,249	\$1,671	\$1,466	\$2,020
Ave. weekly rent payment	\$166	\$216	\$179	\$236	\$170	\$222	\$207	\$268	\$171	\$230	\$180	\$235	\$172	\$230	\$219	\$300
Labour Market (15-64 population)																
Full-time employment ¹	61.7%	60.3%	62.9%	62.0%	62.1%	59.2%	59.2%	59.6%	61.0%	60.3%	61.0%	60.1%	62.4%	60.9%	61.8%	60.4%
Part-time employment ¹	27.1%	28.0%	28.5%	28.4%	26.6%	28.0%	31.0%	30.0%	28.0%	27.9%	28.6%	28.6%	27.7%	28.5%	27.3%	27.6%
Total employment ¹	94.2%	94.4%	96.1%	95.4%	94.1%	93.3%	95.3%	94.8%	94.4%	94.0%	94.8%	94.3%	95.4%	95.0%	95.2%	93.8%
Unemployment rate ¹	5.8%	5.6%	3.9%	4.6%	5.9%	6.7%	4.7%	5.2%	5.6%	6.0%	5.2%	5.7%	4.6%	5.0%	4.8%	6.2%
Participation rate (% of population 15-64 years)	70.5%	72.1%	72.9%	73.5%	68.7%	68.9%	73.4%	73.9%	70.6%	71.3%	71.2%	71.9%	72.2%	73.0%	71.3%	72.7%

	Toowoomba Central		Toowoomba North-East		Toowoomba North-West		Toowoomba South-East		Toowoomba West		Toowoomba City		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Qualifications (% of persons)																
Post-school qualification	36.6%	42.1%	44.3%	49.0%	30.1%	34.8%	41.2%	46.7%	30.8%	36.6%	36.0%	41.3%	35.5%	40.7%	37.5%	43.3%
Bachelor or higher	13.1%	16.0%	22.5%	25.2%	7.3%	8.6%	17.5%	20.8%	8.2%	10.5%	13.1%	15.5%	11.9%	13.9%	13.1%	15.9%
Diploma	5.8%	6.8%	8.2%	8.6%	4.9%	5.4%	7.9%	8.5%	5.0%	5.6%	6.3%	6.9%	6.3%	7.0%	6.6%	7.6%
Certificate	17.8%	19.3%	13.6%	15.2%	17.8%	20.8%	15.7%	17.4%	17.6%	20.5%	16.7%	18.9%	17.3%	19.7%	17.8%	19.8%
Occupation																
Upper White Collar																
Managers	9.2%	9.0%	14.1%	13.3%	7.5%	7.3%	11.4%	11.1%	8.0%	7.8%	9.8%	9.5%	13.3%	12.6%	12.4%	12.1%
Professionals	18.7%	20.6%	29.1%	32.5%	12.3%	13.3%	22.3%	24.3%	12.5%	14.5%	18.2%	20.2%	16.3%	17.7%	17.2%	19.0%
<i>Subtotal</i>	27.9%	29.5%	43.2%	45.8%	19.8%	20.6%	33.8%	35.5%	20.6%	22.3%	28.1%	29.7%	29.6%	30.3%	29.6%	31.1%
Lower White Collar																
Community & Personal Service Workers	9.8%	11.6%	9.0%	10.1%	9.6%	11.1%	9.5%	10.2%	10.3%	11.5%	9.7%	10.9%	8.9%	10.0%	9.1%	9.9%
Clerical and Admin Workers	14.3%	14.4%	14.0%	11.8%	13.9%	13.2%	15.3%	15.8%	14.0%	14.2%	14.4%	14.2%	13.6%	13.9%	14.8%	14.7%
Sales Workers	10.5%	9.8%	9.4%	8.7%	11.2%	10.8%	12.2%	10.3%	11.2%	10.9%	11.2%	10.3%	10.0%	9.4%	10.3%	9.8%
<i>Subtotal</i>	34.6%	35.7%	32.5%	30.6%	34.7%	35.0%	37.1%	36.4%	35.5%	36.7%	35.3%	35.4%	32.5%	33.3%	34.2%	34.4%
Upper Blue Collar																
Technicians & Trades Workers	16.2%	15.1%	11.5%	11.5%	17.1%	17.8%	13.6%	12.9%	17.7%	16.7%	15.4%	14.9%	15.4%	15.3%	15.3%	14.9%
<i>Subtotal</i>	16.2%	15.1%	11.5%	11.5%	17.1%	17.8%	13.6%	12.9%	17.7%	16.7%	15.4%	14.9%	15.4%	15.3%	15.3%	14.9%
Lower Blue Collar																
Machinery Operators & Drivers	6.0%	5.4%	2.8%	2.8%	8.6%	9.0%	4.1%	4.2%	7.9%	7.5%	6.0%	6.0%	6.7%	6.9%	7.2%	7.3%
Labourers	14.2%	12.5%	8.4%	7.7%	18.4%	16.2%	10.2%	9.4%	16.9%	15.3%	13.8%	12.4%	14.3%	12.6%	11.9%	10.5%
<i>Subtotal</i>	20.1%	17.9%	11.2%	10.5%	27.0%	25.2%	14.3%	13.6%	24.7%	22.9%	19.8%	18.4%	21.0%	19.6%	19.1%	17.8%
Employment by Industry (% of employees)																
Agriculture, forestry & fishing	2.0%	1.6%	3.2%	2.7%	1.9%	1.4%	2.6%	2.0%	1.8%	1.7%	2.2%	1.9%	7.2%	6.2%	3.4%	2.8%
Mining	0.5%	1.0%	0.4%	1.2%	0.4%	1.3%	0.5%	0.9%	0.5%	1.4%	0.5%	1.1%	0.6%	1.6%	1.7%	2.6%
Manufacturing	10.9%	8.3%	7.6%	5.2%	15.7%	12.3%	9.0%	7.4%	14.0%	11.0%	11.6%	9.1%	11.8%	9.4%	9.9%	8.4%
Electricity, gas, water & waste services	0.8%	0.8%	0.7%	0.9%	0.7%	0.8%	0.9%	1.1%	0.9%	1.0%	0.8%	0.9%	1.0%	1.1%	1.0%	1.2%
Construction	7.9%	8.2%	5.8%	7.0%	7.3%	6.9%	6.3%	6.6%	7.8%	8.2%	7.0%	7.3%	7.3%	7.7%	9.0%	9.0%
Wholesale trade	3.8%	3.6%	3.4%	2.9%	4.5%	4.9%	3.0%	3.2%	4.2%	4.2%	3.7%	3.8%	3.8%	3.7%	3.9%	3.6%
Retail trade	12.4%	11.3%	10.2%	8.8%	13.1%	12.6%	13.2%	11.4%	13.2%	12.9%	12.7%	11.7%	11.7%	11.0%	11.6%	10.6%
Accommodation & food services	6.6%	7.7%	5.8%	6.7%	6.0%	6.8%	6.3%	6.2%	6.0%	6.6%	6.2%	6.7%	5.3%	5.8%	7.0%	6.9%
Transport, postal & warehousing	3.6%	3.7%	2.3%	2.5%	5.5%	5.8%	3.1%	3.5%	5.0%	5.1%	4.0%	4.2%	4.4%	4.7%	5.1%	5.2%
Information media & telecommunications	1.6%	1.6%	1.6%	1.4%	1.0%	1.1%	1.4%	1.2%	1.2%	0.8%	1.3%	1.2%	1.1%	1.0%	1.4%	1.2%

	Toowoomba Central		Toowoomba North-East		Toowoomba North-West		Toowoomba South-East		Toowoomba West		Toowoomba City		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Financial & insurance services	3.4%	3.5%	4.0%	3.9%	2.7%	2.4%	4.6%	3.9%	2.8%	3.3%	3.6%	3.4%	3.0%	2.8%	2.9%	2.7%
Rental, hiring & real estate services	1.4%	1.3%	2.6%	2.1%	1.4%	1.1%	1.8%	1.6%	1.2%	1.1%	1.6%	1.4%	1.5%	1.3%	2.1%	1.8%
Professional, scientific & technical services	4.4%	4.9%	6.1%	7.4%	2.8%	3.5%	4.8%	5.2%	3.3%	3.6%	4.1%	4.7%	3.7%	4.4%	5.6%	6.5%
Administrative & support services	2.2%	2.1%	2.2%	2.2%	2.5%	2.9%	1.7%	2.2%	2.5%	2.7%	2.2%	2.5%	2.0%	2.2%	3.0%	3.2%
Public administration & safety	6.9%	7.0%	7.2%	6.6%	6.4%	5.8%	7.5%	6.9%	6.3%	6.1%	6.9%	6.5%	7.0%	6.6%	6.7%	6.7%
Education & training	9.9%	10.6%	14.9%	15.4%	7.4%	7.9%	13.5%	14.1%	8.2%	8.4%	10.7%	11.1%	9.7%	10.0%	7.6%	7.9%
Health care & social assistance	14.4%	15.9%	15.9%	17.6%	12.9%	15.0%	13.0%	15.8%	13.0%	14.2%	13.5%	15.5%	12.0%	13.8%	10.2%	11.9%
Arts & recreation services	1.1%	1.0%	0.8%	0.7%	1.0%	1.0%	0.9%	0.9%	1.1%	1.3%	1.0%	1.0%	0.9%	0.9%	1.4%	1.4%
Other services	4.3%	3.9%	3.4%	3.2%	4.6%	4.5%	4.1%	4.0%	4.7%	4.4%	4.3%	4.1%	4.0%	3.9%	3.7%	3.9%

Note 1: percentage of labour force
Source: Australian Bureau of Statistics (2012a)

A socio-economic profile of SLAs within TSD Balance as at the 2006 and 2011 Censuses of Population and Housing, benchmarked against TSD Balance, Toowoomba Regional Council and Queensland, is provided in Table B.2 below. A number of key points can be drawn from this profile including:

- In 2011, the population of TSD Balance was approximately 23,779 persons including:
 - 4,629 persons in Cambooya;
 - 7,912 persons in Westbrook;
 - 5,387 persons in Gowrie; and
 - 10,679 persons in Highfields;
- Highfields recorded the highest average annual population growth between 2006 and 2011 at 4.5% per annum followed by Cambooya (4.1%) and Gowrie (4.0%);
- The average age of residents in 2011 ranged from 33.0 years (Cambooya) to 36.8 years (Highfields), compared with 35.2 years in TSD Balance, 38.1 years in Toowoomba Regional Council and 38.0 years in Queensland;
- Cambooya, Westbrook, Gowrie and Highfields are characterised by young couple families with children households;
- Over 40% of households had mortgages in Cambooya, Westbrook, Gowrie and Highfields, compared with 32.6% of households in Queensland;
- Between 2006 and 2011, the largest increases in average weekly household income within TSD Balance were recorded in Cambooya (42.6%) and Gowrie (46.6%), compared with 20.8% increase in Toowoomba Regional Council and 24.1% increase in Queensland. The largest increases in mortgages were in Gowrie (38.3%), compared with 33.8% in Toowoomba Regional Council and 37.8% in Queensland;
- All regions within TSD Balance recorded lower unemployment than the state average (6.2%), with the unemployment rate lowest in Westbrook (2.9%);
- All regions within TSD Balance recorded a higher labour force participation rate than in Toowoomba Regional Council (73.0%) and Queensland (72.7%); and
- Gowrie recorded a significantly higher proportion of persons employed in the manufacturing industry than Toowoomba Regional Council and Queensland. Highfields recorded a significantly higher proportion of persons employed in the public administration and safety sector than Toowoomba Regional Council and Queensland.

Table B.2: Socio Economic Profile of TSD Balance Catchments in Toowoomba Regional Council, 2006 and 2011 Censuses

	Cambooya		Westbrook		Gowrie		Highfields		TSD Balance		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Population	3,790	4,629	7,003	7,912	4,422	5,387	8,564	10,679	23,779	28,607	141,021	149,212	3,973,958	4,392,097
Ave. Annual Population Growth	-	4.1%	-	2.5%	-	4.0%	-	4.5%	-	3.8%	-	1.1%	-	2.0%
Age Distribution														
0-14 years	29.7%	28.4%	25.6%	24.6%	27.4%	27.2%	26.7%	25.6%	27.0%	26.1%	22.2%	21.8%	20.4%	20.0%
15-24 years	12.1%	12.4%	13.5%	13.8%	11.6%	11.9%	12.3%	11.5%	12.5%	12.4%	14.7%	13.6%	13.6%	13.4%
25-34 years	13.5%	11.0%	12.0%	9.4%	12.1%	12.4%	9.4%	8.2%	11.3%	9.8%	11.8%	11.8%	13.3%	13.4%
35-44 years	15.9%	16.0%	16.0%	14.8%	17.9%	15.3%	16.6%	15.7%	16.5%	15.4%	13.4%	12.8%	14.6%	14.2%
45-54 years	13.6%	14.9%	15.6%	16.2%	14.6%	14.5%	14.9%	14.4%	14.8%	15.0%	13.2%	13.1%	13.7%	13.6%
55-64 years	8.9%	9.4%	10.6%	12.0%	9.6%	10.3%	10.7%	12.0%	10.2%	11.3%	10.8%	11.5%	11.4%	11.7%
65 years and over	6.4%	7.9%	6.8%	9.2%	6.9%	8.5%	9.4%	12.5%	7.7%	10.1%	13.8%	15.4%	13.0%	13.7%
Average age (years)	31.8	33.0	33.7	35.4	33.2	33.7	34.6	36.8	33.6	35.2	37.1	38.1	37.6	38.0
Household Type (% of families)														
Couple families with children	49.2%	49.3%	52.1%	47.7%	45.7%	44.5%	48.8%	43.4%	49.2%	45.7%	30.8%	29.0%	29.4%	29.5%
Couple families without children	27.3%	29.2%	29.8%	31.5%	29.8%	30.4%	32.8%	34.8%	30.5%	32.2%	27.8%	28.1%	26.0%	26.6%
Single parent family	9.3%	7.4%	6.0%	6.5%	7.7%	7.7%	5.6%	7.2%	6.8%	7.1%	10.3%	10.5%	10.5%	10.7%
Lone person	10.2%	11.0%	8.4%	9.3%	11.9%	12.6%	9.2%	10.8%	9.7%	10.8%	23.1%	24.6%	21.0%	21.4%
Ave. household size	3.0	3.0	3.2	3.1	2.4	2.9	3.1	2.9	3.0	3.0	2.7	2.6	2.6	2.7
Household Finances														
% of households fully owning home	28.6%	27.4%	36.2%	34.5%	21.2%	26.0%	38.4%	38.7%	32.3%	33.3%	34.3%	32.2%	30.4%	28.4%
% of households purchasing home	54.9%	56.7%	50.7%	50.6%	47.9%	58.2%	47.4%	43.9%	49.6%	50.5%	31.5%	32.0%	31.4%	32.6%
% of households renting	13.1%	13.3%	10.2%	11.0%	9.4%	11.9%	10.7%	14.4%	10.6%	12.8%	28.3%	29.7%	30.0%	32.0%
Ave. weekly household income	\$877	\$1,250	\$1,020	\$1,320	\$842	\$1,235	\$1,345	\$1,491	\$1,368	\$1,614	\$883	\$1,067	\$1,029	\$1,277
Ave. monthly housing loan repayment	\$1,336	\$1,833	\$1,429	\$1,869	\$1,187	\$1,641	\$1,436	\$1,916	\$1,362	\$1,830	\$1,249	\$1,671	\$1,466	\$2,020
Ave. weekly rent payment	\$184	\$243	\$198	\$283	\$184	\$262	\$238	\$323	\$206	\$290	\$172	\$230	\$219	\$300
Labour Market (15-64 population)														
Full-time employment ¹	64.4%	59.8%	63.3%	62.3%	65.8%	63.2%	62.7%	60.8%	63.7%	61.5%	62.4%	60.9%	61.8%	60.4%
Part-time employment ¹	27.1%	31.2%	28.3%	29.7%	25.4%	27.2%	29.9%	30.7%	28.2%	29.8%	27.7%	28.5%	27.3%	27.6%
Total employment ¹	97.1%	96.8%	97.3%	97.1%	96.7%	95.8%	98.1%	96.7%	97.4%	96.6%	95.4%	95.0%	95.2%	93.8%
Unemployment rate ¹	2.9%	3.2%	2.7%	2.9%	3.3%	4.2%	1.9%	3.3%	2.6%	3.4%	4.6%	5.0%	4.8%	6.2%
Participation rate (% of population 15-64 years)	76.4%	79.0%	76.0%	79.1%	74.4%	77.4%	77.0%	78.7%	76.1%	78.6%	72.2%	73.0%	71.3%	72.7%
Qualifications (% of persons)														
Post-school qualification	42.1%	47.6%	37.3%	42.2%	36.3%	42.7%	45.7%	50.5%	40.9%	46.3%	35.5%	40.7%	37.5%	43.3%
Bachelor or higher	12.1%	14.4%	10.7%	11.3%	6.9%	8.9%	18.1%	19.3%	12.9%	14.4%	11.9%	13.9%	13.1%	15.9%
Diploma	7.1%	8.8%	6.2%	7.5%	6.9%	7.7%	8.8%	9.6%	7.4%	8.5%	6.3%	7.0%	6.6%	7.6%
Certificate	22.9%	24.4%	20.4%	23.4%	22.5%	26.1%	18.7%	21.6%	20.6%	23.4%	17.3%	19.7%	17.8%	19.8%
Occupation														
Upper White Collar														
Managers	12.3%	12.2%	12.7%	13.4%	8.8%	9.3%	13.2%	13.1%	12.1%	12.3%	13.3%	12.6%	12.4%	12.1%
Professionals	15.5%	17.6%	14.0%	13.8%	10.9%	11.7%	22.8%	22.6%	16.8%	17.2%	16.3%	17.7%	17.2%	19.0%
<i>Subtotal</i>	27.7%	29.8%	26.7%	27.2%	19.7%	20.9%	36.0%	35.7%	28.9%	29.6%	29.6%	30.3%	29.6%	31.1%
Lower White Collar														
Community & Personal Service Workers	8.0%	9.0%	7.3%	8.4%	8.3%	9.9%	9.6%	10.5%	8.4%	9.5%	8.9%	10.0%	9.1%	9.9%
Clerical and Admin Workers	14.0%	15.2%	16.2%	16.6%	14.6%	14.7%	15.5%	16.5%	15.3%	16.0%	13.6%	13.9%	14.8%	14.7%
Sales Workers	8.2%	9.7%	10.9%	10.2%	9.6%	9.4%	10.3%	8.9%	10.0%	9.5%	10.0%	9.4%	10.3%	9.8%
<i>Subtotal</i>	30.3%	33.8%	34.4%	35.2%	32.5%	34.0%	35.4%	35.9%	33.8%	35.0%	32.5%	33.3%	34.2%	34.4%
Upper Blue Collar														
Technicians & Trades Workers	18.7%	17.4%	18.0%	18.4%	18.9%	19.3%	15.2%	14.7%	17.3%	17.1%	15.4%	15.3%	15.3%	14.9%
<i>Subtotal</i>	18.7%	17.4%	18.0%	18.4%	18.9%	19.3%	15.2%	14.7%	17.3%	17.1%	15.4%	15.3%	15.3%	14.9%
Lower Blue Collar														
Machinery Operators & Drivers	7.6%	7.7%	7.9%	7.9%	9.8%	10.0%	4.5%	5.4%	7.0%	7.3%	6.7%	6.9%	7.2%	7.3%
Labourers	14.2%	9.8%	11.5%	10.2%	17.8%	13.8%	7.7%	6.7%	11.7%	9.5%	14.3%	12.6%	11.9%	10.5%
<i>Subtotal</i>	21.8%	17.5%	19.3%	18.1%	27.6%	23.9%	12.2%	12.0%	18.6%	16.9%	21.0%	19.6%	19.1%	17.8%
Employment by Industry (% of employees)														
Agriculture, forestry & fishing	5.2%	4.6%	3.6%	3.0%	3.3%	3.0%	3.8%	2.7%	3.9%	3.2%	7.2%	6.2%	3.4%	2.8%
Mining	0.8%	2.1%	0.8%	1.8%	1.0%	2.9%	0.7%	2.3%	0.8%	2.2%	0.6%	1.6%	1.7%	2.6%
Manufacturing	11.7%	8.8%	12.4%	9.8%	18.0%	12.6%	8.3%	7.0%	11.8%	9.1%	11.8%	9.4%	9.9%	8.4%
Electricity, gas, water & waste services	1.0%	1.2%	1.2%	1.7%	1.0%	1.0%	1.0%	1.1%	1.0%	1.3%	1.0%	1.1%	1.0%	1.2%

	Cambooya		Westbrook		Gowrie		Highfields		TSD Balance		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Construction	10.9%	9.4%	10.0%	10.2%	8.2%	9.5%	9.1%	9.3%	9.5%	9.6%	7.3%	7.7%	9.0%	9.0%
Wholesale trade	3.9%	4.6%	4.6%	4.9%	4.3%	4.1%	3.5%	3.0%	4.0%	4.0%	3.8%	3.7%	3.9%	3.6%
Retail trade	11.0%	12.2%	12.8%	13.0%	11.4%	10.4%	11.6%	9.7%	11.8%	11.2%	11.7%	11.0%	11.6%	10.6%
Accommodation & food services	4.6%	4.4%	4.3%	4.5%	4.2%	5.1%	4.6%	5.3%	4.4%	4.9%	5.3%	5.8%	7.0%	6.9%
Transport, postal & warehousing	4.8%	4.7%	6.5%	6.0%	7.0%	6.8%	3.3%	3.6%	5.2%	5.0%	4.4%	4.7%	5.1%	5.2%
Information media & telecommunications	1.1%	0.8%	0.8%	1.0%	0.8%	0.5%	1.0%	1.1%	0.9%	0.9%	1.1%	1.0%	1.4%	1.2%
Financial & insurance services	3.8%	2.3%	3.1%	2.5%	2.6%	2.1%	3.2%	3.2%	3.2%	2.7%	3.0%	2.8%	2.9%	2.7%
Rental, hiring & real estate services	0.9%	1.5%	1.8%	1.4%	1.2%	0.8%	2.0%	1.5%	1.6%	1.4%	1.5%	1.3%	2.1%	1.8%
Professional, scientific & technical services	4.0%	5.3%	3.8%	3.8%	3.1%	3.4%	4.4%	5.9%	3.9%	4.7%	3.7%	4.4%	5.6%	6.5%
Administrative & support services	2.7%	2.4%	2.1%	2.5%	2.5%	2.5%	1.1%	2.0%	1.9%	2.3%	2.0%	2.2%	3.0%	3.2%
Public administration & safety	6.1%	6.6%	5.7%	5.0%	8.1%	8.0%	12.4%	11.6%	8.6%	8.2%	7.0%	6.6%	6.7%	6.7%
Education & training	10.3%	10.3%	8.3%	8.5%	5.2%	6.7%	12.4%	11.6%	9.5%	9.6%	9.7%	10.0%	7.6%	7.9%
Health care & social assistance	10.7%	12.5%	10.3%	12.0%	11.9%	14.2%	11.8%	12.8%	11.2%	12.8%	12.0%	13.8%	10.2%	11.9%
Arts & recreation services	0.7%	0.7%	0.8%	1.2%	0.3%	0.6%	0.8%	0.7%	0.7%	0.8%	0.9%	0.9%	1.4%	1.4%
Other services	4.1%	4.3%	5.3%	5.2%	4.1%	4.3%	3.2%	3.7%	4.1%	4.4%	4.0%	3.9%	3.7%	3.9%

Note 1: percentage of labour force
Source: Australian Bureau of Statistics (2012a)

A socio-economic profile of SLAs within Toowoomba Rural as at the 2006 and 2011 Censuses of Population and Housing, benchmarked against Toowoomba Rural, Toowoomba Regional Council and Queensland, is provided in Table B.3 below. A number of key points can be drawn from this profile including:

- In 2011, the population of Toowoomba Rural was approximately 27,448 persons including:
 - 4,172 persons in Crow's Nest;
 - 2,765 persons in Clifton;
 - 2,074 persons in Greenmount;
 - 7,162 persons in Jondaryan;
 - 4,346 persons in Rosalie;
 - 4,836 persons in Pittsworth; and
 - 3,022 persons in Millmerran;
- Greenmount recorded the highest average annual population growth between 2006 and 2011 at 2.4% per annum. Rosalie and Millmerran recorded a decline in the population between 2006 and 2011;
- The average age of residents in 2011 ranged from 38.3 years (Pittsworth) to 41.9 years (Clifton), compared with 40.2 years in Toowoomba Rural, 38.1 years in Toowoomba Regional Council and 38.0 years in Queensland;
- Crow's Nest, Clifton, Greenmount, Jondaryan, Rosalie, Pittsworth and Millmerran are generally characterised by an older population with either couple families without children or lone person households;
- In 2011, over 40% of household fully owned their home in Crow's Nest, Clifton, Greenmount and Rosalie significantly higher than the state average of 28.4% of households;
- Between 2006 and 2011, the largest increases in average weekly household income within Toowoomba Rural were recorded in Greenmount (36.9%), compared with 20.8% increase in Toowoomba Regional Council and 24.1% increase in Queensland. The largest increases in mortgages were in Crow's Nest (38.4%) and Pittsworth (42.0%) compared with 33.8% in Toowoomba Regional Council and 37.8% in Queensland;
- Crow's Nest, Clifton, Greenmount and Rosalie recorded unemployment over 5% in 2011. Nevertheless, all regions within Toowoomba Rural recorded lower unemployment than the state average (6.2%). Pittsworth and Millmerran were the only regions to record a decline in the unemployment rate between 2006 and 2011; and
- Toowoomba Rural recorded a significantly higher proportion of persons employed in the agriculture, forestry and fishing industry than Queensland with all SLAs in Toowoomba Rural recording over 15% of total employment in the industry. Jondaryan recorded a significantly higher proportion of persons employed in the manufacturing industry than Toowoomba Regional Council and Queensland.

Table B.3: Socio Economic Profile of Rural Catchments in Toowoomba Regional Council, 2006 and 2011 Censuses

	Crow's Nest		Clifton		Greenmount		Jondaryan		Rosalie		Pittsworth		Millmerran		Toowoomba Rural		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Population	3,988	4,172	2,542	2,765	1,846	2,074	6,924	7,162	4,434	4,346	4,645	4,836	3,069	3,022	27,448	28,377	141,021	149,212	3,973,958	4,392,097
Ave. Annual Population Growth	-	0.9%	-	1.7%	-	2.4%	-	0.7%	-	-0.4%	-	0.8%	-	-0.3%	-	0.7%	-	1.1%	-	2.0%
Age Distribution																				
0-14 years	21.7%	20.0%	22.5%	21.3%	23.6%	21.1%	23.4%	21.7%	23.3%	22.5%	24.7%	24.2%	24.0%	21.2%	23.4%	21.8%	22.2%	21.8%	20.4%	20.0%
15-24 years	9.4%	8.5%	9.9%	8.6%	10.6%	11.8%	12.6%	13.0%	9.7%	9.6%	11.7%	12.6%	9.2%	10.0%	10.7%	10.9%	14.7%	13.6%	13.6%	13.4%
25-34 years	7.5%	7.9%	9.3%	8.7%	10.1%	9.1%	11.4%	10.0%	9.0%	9.3%	9.6%	8.7%	10.8%	9.9%	9.8%	9.1%	11.8%	11.8%	13.3%	13.4%
35-44 years	12.9%	10.6%	12.5%	12.6%	14.3%	12.1%	14.6%	13.4%	13.7%	11.9%	14.5%	13.0%	14.6%	13.2%	14.0%	12.5%	13.4%	12.8%	14.6%	14.2%
45-54 years	13.7%	13.6%	15.0%	13.2%	16.6%	16.3%	14.0%	15.0%	14.7%	13.7%	13.7%	13.3%	14.5%	14.4%	14.4%	14.2%	13.2%	13.1%	13.7%	13.6%
55-64 years	15.6%	15.4%	14.4%	15.1%	13.7%	15.5%	11.6%	11.6%	14.6%	15.1%	11.7%	12.3%	12.9%	13.6%	13.2%	13.7%	10.8%	11.5%	11.4%	11.7%
65 years and over	19.2%	24.0%	16.3%	20.5%	11.2%	14.3%	12.4%	15.4%	15.0%	17.9%	14.1%	15.9%	14.0%	17.7%	14.6%	17.8%	13.8%	15.4%	13.0%	13.7%
Average age (years)	39.4	41.3	39.9	41.9	37.4	39.4	36.8	38.6	39.2	40.3	37.5	38.3	38.2	40.4	38.5	40.2	37.1	38.1	37.6	38.0
Household Type (% of families)																				
Couple families with children	28.7%	24.4%	31.5%	26.7%	36.3%	32.8%	34.4%	30.5%	30.5%	26.5%	36.8%	32.9%	29.2%	26.2%	32.5%	28.6%	30.8%	29.0%	29.4%	29.5%
Couple families without children	36.2%	36.3%	32.4%	34.4%	34.4%	36.0%	30.2%	30.2%	32.3%	31.5%	31.3%	31.7%	31.4%	31.5%	32.3%	32.5%	27.8%	28.1%	26.0%	26.6%
Single parent family	9.5%	8.1%	9.6%	9.7%	9.4%	9.3%	10.0%	9.5%	7.8%	7.2%	8.8%	10.1%	7.7%	7.9%	9.0%	8.9%	10.3%	10.5%	10.5%	10.7%
Lone person	20.8%	23.8%	20.4%	24.3%	14.8%	17.5%	19.0%	20.2%	21.9%	24.3%	18.2%	20.0%	23.3%	24.0%	20.0%	22.0%	23.1%	24.6%	21.0%	21.4%
Ave. household size	2.6	2.5	2.6	2.5	2.7	2.6	2.8	2.7	2.6	2.5	2.8	2.7	2.6	2.5	2.7	2.6	2.7	2.6	2.6	2.7
Household Finances																				
% of households fully owning home	48.3%	46.0%	44.4%	42.6%	46.2%	40.1%	35.8%	33.7%	46.2%	42.7%	40.1%	36.8%	40.5%	38.2%	42.2%	39.4%	34.3%	32.2%	30.4%	28.4%
% of households purchasing home	27.1%	28.5%	27.7%	27.2%	37.6%	37.3%	28.4%	29.4%	25.2%	24.3%	30.6%	30.8%	23.0%	22.9%	28.0%	28.3%	31.5%	32.0%	31.4%	32.6%
% of households renting	19.3%	18.0%	21.6%	23.3%	13.4%	17.3%	29.6%	29.4%	21.7%	25.5%	25.1%	26.6%	29.9%	30.0%	24.2%	25.2%	28.3%	29.7%	30.0%	32.0%
Ave. weekly household income	\$740	\$822	\$826	\$860	\$813	\$1,113	\$903	\$1,100	\$824	\$960	\$890	\$1,027	\$949	\$1,174	\$865	\$1,022	\$883	\$1,067	\$1,029	\$1,277
Ave. monthly housing loan repayment	\$1,183	\$1,637	\$1,181	\$1,350	\$1,331	\$1,658	\$1,158	\$1,481	\$1,052	\$1,314	\$1,127	\$1,599	\$979	\$1,309	\$1,143	\$1,495	\$1,249	\$1,671	\$1,466	\$2,020
Ave. weekly rent payment	\$124	\$174	\$117	\$171	\$123	\$211	\$135	\$191	\$127	\$161	\$131	\$205	\$102	\$153	\$125	\$181	\$172	\$230	\$219	\$300
Labour Market (15-64 population)																				
Full-time employment ¹	60.1%	58.8%	65.0%	59.8%	66.1%	63.9%	68.5%	66.3%	66.3%	62.5%	64.1%	61.2%	66.8%	66.1%	65.6%	63.1%	62.4%	60.9%	61.8%	60.4%
Part-time employment ¹	28.1%	30.4%	25.5%	29.4%	25.9%	25.8%	21.6%	23.2%	23.2%	25.4%	26.4%	29.8%	22.9%	24.4%	24.4%	26.6%	27.7%	28.5%	27.3%	27.6%
Total employment ¹	95.0%	94.9%	95.1%	94.1%	97.4%	95.0%	95.7%	95.6%	95.4%	95.0%	95.7%	96.8%	95.6%	96.7%	95.6%	95.6%	95.4%	95.0%	95.2%	93.8%
Unemployment rate ¹	5.0%	5.1%	4.9%	5.9%	2.6%	5.0%	4.3%	4.4%	4.6%	5.0%	4.3%	3.2%	4.4%	3.3%	4.4%	4.4%	4.6%	5.0%	4.8%	6.2%
Participation rate (% of population 15-64 years)	69.5%	66.6%	69.8%	66.3%	77.0%	77.1%	72.4%	71.8%	66.6%	64.0%	76.7%	76.2%	71.4%	70.5%	71.8%	70.4%	72.2%	73.0%	71.3%	72.7%
Qualifications (% of persons)																				
Post-school qualification	34.3%	39.0%	29.8%	34.9%	37.8%	41.2%	27.0%	31.0%	25.9%	30.4%	28.5%	32.4%	25.5%	29.1%	29.0%	33.3%	35.5%	40.7%	37.5%	43.3%
Bachelor or higher	9.6%	11.4%	7.6%	8.9%	13.3%	13.9%	5.8%	6.6%	5.5%	6.5%	6.7%	6.6%	5.5%	7.1%	7.1%	8.1%	11.9%	13.9%	13.1%	15.9%
Diploma	7.8%	8.2%	4.9%	6.7%	7.1%	7.6%	4.8%	5.6%	4.3%	4.9%	5.1%	5.8%	4.8%	4.8%	5.4%	6.1%	6.3%	7.0%	6.6%	7.6%
Certificate	16.8%	19.3%	17.3%	19.3%	17.4%	19.7%	16.5%	18.9%	16.1%	19.1%	16.7%	19.9%	15.1%	17.2%	16.5%	19.1%	17.3%	19.7%	17.8%	19.8%
Occupation																				
Upper White Collar																				
Managers	23.9%	21.2%	34.3%	29.1%	27.3%	25.2%	20.8%	19.3%	33.0%	28.6%	22.2%	19.9%	26.0%	24.3%	25.6%	22.9%	13.3%	12.6%	12.4%	12.1%
Professionals	14.1%	14.5%	9.1%	12.0%	14.8%	14.6%	8.2%	8.5%	6.9%	9.6%	8.7%	8.7%	7.5%	8.4%	9.4%	10.3%	16.3%	17.7%	17.2%	19.0%
<i>Subtotal</i>	38.0%	35.7%	43.4%	41.1%	42.1%	39.8%	28.9%	27.7%	39.9%	38.2%	31.0%	28.6%	33.5%	32.7%	35.0%	33.2%	29.6%	30.3%	29.6%	31.1%
Lower White Collar																				
Community & Personal Service Workers	8.6%	10.2%	7.1%	8.1%	7.8%	6.2%	7.4%	8.1%	5.6%	5.9%	6.0%	6.5%	6.0%	6.4%	6.9%	7.4%	8.9%	10.0%	9.1%	9.9%
Clerical and Admin Workers	9.3%	11.1%	8.4%	10.5%	11.4%	13.7%	9.4%	9.7%	8.3%	9.0%	9.7%	11.2%	9.8%	8.0%	9.4%	10.3%	13.6%	13.9%	14.8%	14.7%
Sales Workers	6.3%	6.0%	5.5%	7.0%	6.5%	7.3%	6.3%	6.9%	5.8%	5.5%	7.2%	7.3%	3.9%	4.5%	6.1%	6.4%	10.0%	9.4%	10.3%	9.8%
<i>Subtotal</i>	24.1%	27.3%	21.1%	25.6%	25.7%	27.1%	23.2%	24.8%	19.7%	20.4%	22.9%	25.0%	19.7%	18.8%	22.3%	24.2%	32.5%	33.3%	34.2%	34.4%
Upper Blue Collar																				
Technicians & Trades Workers	12.4%	13.1%	12.0%	11.3%	13.5%	16.7%	13.5%	15.0%	13.9%	13.6%	15.7%	16.0%	12.5%	14.1%	13.5%	14.4%	15.4%	15.3%	15.3%	14.9%
<i>Subtotal</i>	12.4%	13.1%	12.0%	11.3%	13.5%	16.7%	13.5%	15.0%	13.9%	13.6%	15.7%	16.0%	12.5%	14.1%	13.5%	14.4%	15.4%	15.3%	15.3%	14.9%
Lower Blue Collar																				
Machinery Operators & Drivers	7.8%	8.0%	7.3%	7.2%	6.7%	6.0%	8.8%	10.0%	9.2%	11.0%	9.2%	10.7%	13.0%	12.8%	9.0%	9.7%	6.7%	6.9%	7.2%	7.3%
Labourers	15.5%	14.3%	15.0%	13.9%	10.9%	9.0%	24.1%	20.5%	14.7%	14.8%	19.6%	18.0%	19.9%	19.4%	18.4%	16.8%	14.3%	12.6%	11.9%	10.5%
<i>Subtotal</i>	23.3%	22.4%	22.4%	21.1%	17.6%	15.0%	32.9%	30.5%	23.9%	25.8%	28.8%	28.7%	33.0%	32.3%	27.4%	26.5%	21.0%	19.6%	19.1%	17.8%
Employment by Industry (% of employees)																				
Agriculture, forestry & fishing	21.8%	19.3%	34.2%	31.5%	24.0%	20.5%	18.8%	17.1%	31.9%	29.4%	26.2%	24.3%	35.5%	35.5%	26.1%	24.0%	7.2%	6.2%	3.4%	2.8%
Mining	0.8%	2.4%	0.7%	0.8%	0.4%	0.8%	0.8%	1.9%	2.0%	3.9%	1.0%	1.8%	2.3%	3.9%	1.1%	2.3%	0.6%	1.6%	1.7%	2.6%
Manufacturing	8.5%	7.4%	7.2%	7.1%	9.2%	6.9%	20.8%	18.1%	12.1%	9.3%	12.2%	10.9%	6.3%	4.7%	12.6%	10.7%	11.8%	9.4%	9.9%	8.4%
Electricity, gas, water & waste services	0.5%	1.2%	0.5%	0.6%	0.3%	0.4%	0.7%	0.8%	2.2%	2.1%	1.5%	1.4%	3.8%	3.9%	1.3%	1.4%	1.0%	1.1%	1.0%	1.2%
Construction	6.3%	7.0%	4.3%	5.1%	8.9%	8.5%	4.8%	5.4%	5.7%	6.9%	7.1%	7.3%	7.3%	7.4%	6.1%	6.6%	7.3%	7.7%	9.0%	9.0%

	Crow's Nest		Clifton		Greenmount		Jondaryan		Rosalie		Pittsworth		Millmerran		Toowoomba Rural		Toowoomba Regional Council		Queensland	
	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011	2006	2011
Wholesale trade	3.5%	2.5%	2.6%	3.3%	3.8%	3.5%	4.8%	3.9%	3.1%	2.9%	2.9%	2.8%	3.2%	2.6%	3.6%	3.1%	3.8%	3.7%	3.9%	3.6%
Retail trade	8.6%	8.2%	9.0%	8.3%	8.7%	8.8%	8.2%	8.2%	7.7%	7.8%	10.7%	9.7%	5.8%	6.6%	8.5%	8.3%	11.7%	11.0%	11.6%	10.6%
Accommodation & food services	4.0%	3.6%	4.2%	4.1%	2.5%	3.4%	3.2%	4.0%	2.5%	3.0%	3.7%	4.8%	3.2%	2.6%	3.3%	3.7%	5.3%	5.8%	7.0%	6.9%
Transport, postal & warehousing	4.3%	3.7%	5.2%	4.6%	3.7%	4.4%	5.3%	6.4%	4.4%	5.1%	6.1%	7.6%	5.5%	4.8%	5.0%	5.6%	4.4%	4.7%	5.1%	5.2%
Information media & telecommunications	0.8%	0.5%	0.8%	0.3%	0.6%	0.3%	0.5%	0.3%	0.4%	0.3%	0.3%	0.3%	0.0%	0.0%	0.5%	0.3%	1.1%	1.0%	1.4%	1.2%
Financial & insurance services	1.1%	1.2%	1.1%	0.4%	1.3%	1.9%	1.4%	1.1%	0.8%	0.6%	0.8%	1.4%	0.8%	0.7%	1.1%	1.1%	3.0%	2.8%	2.9%	2.7%
Rental, hiring & real estate services	0.5%	1.0%	0.9%	0.9%	1.0%	1.3%	0.6%	0.8%	0.9%	0.6%	0.8%	1.0%	0.3%	0.4%	0.7%	0.8%	1.5%	1.3%	2.1%	1.8%
Professional, scientific & technical services	3.6%	4.1%	1.5%	2.1%	3.1%	4.7%	2.2%	3.1%	1.3%	2.1%	2.8%	2.6%	1.2%	1.5%	2.3%	2.9%	3.7%	4.4%	5.6%	6.5%
Administrative & support services	1.2%	2.0%	1.4%	1.8%	0.9%	2.6%	1.2%	1.4%	1.6%	1.5%	1.7%	1.2%	2.0%	0.7%	1.5%	1.5%	2.0%	2.2%	3.0%	3.2%
Public administration & safety	8.2%	6.8%	3.8%	3.6%	4.9%	5.6%	7.6%	7.1%	5.1%	5.5%	3.4%	3.4%	5.4%	4.2%	5.8%	5.4%	7.0%	6.6%	6.7%	6.7%
Education & training	9.0%	9.1%	7.2%	9.2%	9.2%	9.0%	4.9%	4.9%	6.4%	7.1%	5.8%	5.7%	5.5%	6.1%	6.4%	6.7%	9.7%	10.0%	7.6%	7.9%
Health care & social assistance	11.0%	14.4%	9.7%	10.2%	11.6%	11.3%	7.5%	8.5%	5.7%	6.2%	6.4%	7.2%	6.9%	8.8%	7.9%	9.1%	12.0%	13.8%	10.2%	11.9%
Arts & recreation services	0.7%	0.5%	0.8%	0.8%	0.3%	0.6%	1.0%	1.0%	0.2%	0.3%	0.4%	0.5%	0.0%	0.0%	0.5%	0.6%	0.9%	0.9%	1.4%	1.4%
Other services	2.9%	3.3%	2.3%	2.2%	3.0%	3.5%	2.9%	3.3%	2.1%	2.3%	4.0%	3.8%	2.5%	2.8%	2.9%	3.1%	4.0%	3.9%	3.7%	3.9%

Note 1: percentage of labour force
Source: Australian Bureau of Statistics (2012a)

APPENDIX C

DETAILED RETAIL EXPENDITURE TABLES

Table C.1: Weekly Retail Expenditure Patterns of Catchment Area Households – Detailed Tables, 2013-2031 (2013 dollars)

	2013	2016	2021	2026	2031
Toowoomba Central					
Groceries & take home food	\$171.72	\$174.31	\$178.71	\$183.22	\$187.85
Dining & takeaway food (incl. on-premise liquor)	\$54.80	\$55.63	\$57.03	\$58.47	\$59.95
Clothing, footwear & apparel	\$40.15	\$40.75	\$41.78	\$42.84	\$43.92
Personal & other goods	\$64.39	\$65.36	\$67.01	\$68.70	\$70.44
Core bulky goods	\$55.24	\$56.07	\$57.49	\$58.94	\$60.43
Ancillary bulky goods	\$63.79	\$64.76	\$66.39	\$68.07	\$69.79
Hardware	\$20.00	\$20.30	\$20.82	\$21.34	\$21.88
Takeaway liquor	\$20.85	\$21.16	\$21.70	\$22.25	\$22.81
<i>Total Grocery & Specialty</i>	<i>\$351.91</i>	<i>\$357.21</i>	<i>\$366.23</i>	<i>\$375.48</i>	<i>\$384.96</i>
<i>Total Bulky Goods</i>	<i>\$139.03</i>	<i>\$141.13</i>	<i>\$144.69</i>	<i>\$148.35</i>	<i>\$152.09</i>
<i>Total</i>	<i>\$490.94</i>	<i>\$498.34</i>	<i>\$510.93</i>	<i>\$523.83</i>	<i>\$537.06</i>
Toowoomba North-East					
Groceries & take home food	\$198.06	\$201.04	\$206.12	\$211.32	\$216.66
Dining & takeaway food (incl. on-premise liquor)	\$75.27	\$76.41	\$78.34	\$80.31	\$82.34
Clothing, footwear & apparel	\$50.40	\$51.16	\$52.45	\$53.77	\$55.13
Personal & other goods	\$82.72	\$83.97	\$86.09	\$88.26	\$90.49
Core bulky goods	\$65.70	\$66.70	\$68.38	\$70.11	\$71.88
Ancillary bulky goods	\$77.29	\$78.46	\$80.44	\$82.47	\$84.55
Hardware	\$24.23	\$24.59	\$25.21	\$25.85	\$26.50
Takeaway liquor	\$24.11	\$24.47	\$25.09	\$25.72	\$26.37
<i>Total Grocery & Specialty</i>	<i>\$430.56</i>	<i>\$437.05</i>	<i>\$448.08</i>	<i>\$459.40</i>	<i>\$471.00</i>
<i>Total Bulky Goods</i>	<i>\$167.22</i>	<i>\$169.75</i>	<i>\$174.03</i>	<i>\$178.43</i>	<i>\$182.93</i>
<i>Total</i>	<i>\$597.78</i>	<i>\$606.79</i>	<i>\$622.11</i>	<i>\$637.82</i>	<i>\$653.93</i>
Toowoomba North-West					
Groceries & take home food	\$171.60	\$174.18	\$178.58	\$183.09	\$187.71
Dining & takeaway food (incl. on-premise liquor)	\$53.50	\$54.31	\$55.68	\$57.09	\$58.53
Clothing, footwear & apparel	\$38.89	\$39.48	\$40.48	\$41.50	\$42.55
Personal & other goods	\$63.02	\$63.97	\$65.59	\$67.24	\$68.94
Core bulky goods	\$54.03	\$54.84	\$56.23	\$57.65	\$59.10
Ancillary bulky goods	\$62.00	\$62.93	\$64.52	\$66.15	\$67.82
Hardware	\$19.75	\$20.05	\$20.55	\$21.07	\$21.60
Takeaway liquor	\$20.81	\$21.12	\$21.66	\$22.20	\$22.76
<i>Total Grocery & Specialty</i>	<i>\$347.82</i>	<i>\$353.07</i>	<i>\$361.98</i>	<i>\$371.12</i>	<i>\$380.49</i>
<i>Total Bulky Goods</i>	<i>\$135.77</i>	<i>\$137.82</i>	<i>\$141.30</i>	<i>\$144.87</i>	<i>\$148.53</i>
<i>Total</i>	<i>\$483.60</i>	<i>\$490.89</i>	<i>\$503.28</i>	<i>\$515.99</i>	<i>\$529.02</i>
Toowoomba South-East					
Groceries & take home food	\$187.39	\$190.21	\$195.01	\$199.94	\$204.99
Dining & takeaway food (incl. on-premise liquor)	\$68.41	\$69.44	\$71.20	\$73.00	\$74.84
Clothing, footwear & apparel	\$47.68	\$48.40	\$49.63	\$50.88	\$52.16
Personal & other goods	\$76.82	\$77.98	\$79.95	\$81.97	\$84.04
Core bulky goods	\$62.85	\$63.80	\$65.41	\$67.06	\$68.75
Ancillary bulky goods	\$73.89	\$75.00	\$76.90	\$78.84	\$80.83
Hardware	\$22.80	\$23.14	\$23.72	\$24.32	\$24.94
Takeaway liquor	\$22.82	\$23.16	\$23.75	\$24.35	\$24.96
<i>Total Grocery & Specialty</i>	<i>\$403.12</i>	<i>\$409.20</i>	<i>\$419.53</i>	<i>\$430.13</i>	<i>\$440.99</i>
<i>Total Bulky Goods</i>	<i>\$159.53</i>	<i>\$161.94</i>	<i>\$166.03</i>	<i>\$170.22</i>	<i>\$174.52</i>
<i>Total</i>	<i>\$562.66</i>	<i>\$571.14</i>	<i>\$585.56</i>	<i>\$600.35</i>	<i>\$615.51</i>

	2013	2016	2021	2026	2031
Toowoomba West					
Groceries & take home food	\$171.63	\$174.22	\$178.62	\$183.13	\$187.75
Dining & takeaway food (incl. on-premise liquor)	\$53.87	\$54.68	\$56.07	\$57.48	\$58.93
Clothing, footwear & apparel	\$39.25	\$39.84	\$40.85	\$41.88	\$42.94
Personal & other goods	\$63.41	\$64.37	\$65.99	\$67.66	\$69.37
Core bulky goods	\$54.37	\$55.19	\$56.58	\$58.01	\$59.48
Ancillary bulky goods	\$62.51	\$63.45	\$65.05	\$66.69	\$68.38
Hardware	\$19.82	\$20.12	\$20.63	\$21.15	\$21.68
Takeaway liquor	\$20.82	\$21.13	\$21.67	\$22.22	\$22.78
<i>Total Grocery & Specialty</i>	<i>\$348.99</i>	<i>\$354.25</i>	<i>\$363.19</i>	<i>\$372.36</i>	<i>\$381.77</i>
<i>Total Bulky Goods</i>	<i>\$136.70</i>	<i>\$138.76</i>	<i>\$142.27</i>	<i>\$145.86</i>	<i>\$149.54</i>
<i>Total</i>	<i>\$485.69</i>	<i>\$493.01</i>	<i>\$505.46</i>	<i>\$518.22</i>	<i>\$531.31</i>
Highfields					
Groceries & take home food	\$208.86	\$212.01	\$217.36	\$222.85	\$228.48
Dining & takeaway food (incl. on-premise liquor)	\$82.21	\$83.45	\$85.56	\$87.72	\$89.94
Clothing, footwear & apparel	\$53.14	\$53.94	\$55.31	\$56.70	\$58.13
Personal & other goods	\$88.69	\$90.03	\$92.30	\$94.63	\$97.02
Core bulky goods	\$68.60	\$69.63	\$71.39	\$73.19	\$75.04
Ancillary bulky goods	\$80.74	\$81.95	\$84.02	\$86.14	\$88.32
Hardware	\$25.68	\$26.06	\$26.72	\$27.40	\$28.09
Takeaway liquor	\$25.42	\$25.80	\$26.45	\$27.12	\$27.80
<i>Total Grocery & Specialty</i>	<i>\$458.32</i>	<i>\$465.23</i>	<i>\$476.98</i>	<i>\$489.02</i>	<i>\$501.37</i>
<i>Total Bulky Goods</i>	<i>\$175.01</i>	<i>\$177.65</i>	<i>\$182.13</i>	<i>\$186.73</i>	<i>\$191.45</i>
<i>Total</i>	<i>\$633.33</i>	<i>\$642.88</i>	<i>\$659.11</i>	<i>\$675.75</i>	<i>\$692.82</i>
Gowrie					
Groceries & take home food	\$187.53	\$190.36	\$195.17	\$200.09	\$205.15
Dining & takeaway food (incl. on-premise liquor)	\$68.51	\$69.54	\$71.30	\$73.10	\$74.94
Clothing, footwear & apparel	\$47.72	\$48.44	\$49.66	\$50.92	\$52.20
Personal & other goods	\$76.90	\$78.06	\$80.03	\$82.05	\$84.13
Core bulky goods	\$62.89	\$63.84	\$65.45	\$67.10	\$68.79
Ancillary bulky goods	\$73.94	\$75.05	\$76.95	\$78.89	\$80.88
Hardware	\$22.81	\$23.16	\$23.74	\$24.34	\$24.96
Takeaway liquor	\$22.84	\$23.18	\$23.77	\$24.37	\$24.98
<i>Total Grocery & Specialty</i>	<i>\$403.50</i>	<i>\$409.58</i>	<i>\$419.92</i>	<i>\$430.53</i>	<i>\$441.40</i>
<i>Total Bulky Goods</i>	<i>\$159.64</i>	<i>\$162.05</i>	<i>\$166.14</i>	<i>\$170.33</i>	<i>\$174.63</i>
<i>Total</i>	<i>\$563.14</i>	<i>\$571.63</i>	<i>\$586.06</i>	<i>\$600.86</i>	<i>\$616.03</i>
Westbrook					
Groceries & take home food	\$211.12	\$214.30	\$219.71	\$225.26	\$230.95
Dining & takeaway food (incl. on-premise liquor)	\$83.67	\$84.93	\$87.07	\$89.27	\$91.52
Clothing, footwear & apparel	\$53.72	\$54.53	\$55.90	\$57.32	\$58.76
Personal & other goods	\$89.94	\$91.29	\$93.60	\$95.96	\$98.38
Core bulky goods	\$69.20	\$70.24	\$72.02	\$73.84	\$75.70
Ancillary bulky goods	\$81.46	\$82.68	\$84.77	\$86.91	\$89.11
Hardware	\$25.98	\$26.37	\$27.04	\$27.72	\$28.42
Takeaway liquor	\$25.69	\$26.08	\$26.73	\$27.41	\$28.10
<i>Total Grocery & Specialty</i>	<i>\$464.12</i>	<i>\$471.12</i>	<i>\$483.02</i>	<i>\$495.21</i>	<i>\$507.72</i>
<i>Total Bulky Goods</i>	<i>\$176.64</i>	<i>\$179.30</i>	<i>\$183.83</i>	<i>\$188.47</i>	<i>\$193.23</i>
<i>Total</i>	<i>\$640.76</i>	<i>\$650.42</i>	<i>\$666.84</i>	<i>\$683.68</i>	<i>\$700.95</i>

	2013	2016	2021	2026	2031
Cambooya					
Groceries & take home food	\$194.55	\$197.48	\$202.46	\$207.58	\$212.82
Dining & takeaway food (incl. on-premise liquor)	\$73.01	\$74.12	\$75.99	\$77.91	\$79.87
Clothing, footwear & apparel	\$49.50	\$50.25	\$51.52	\$52.82	\$54.15
Personal & other goods	\$80.78	\$82.00	\$84.07	\$86.19	\$88.37
Core bulky goods	\$64.76	\$65.74	\$67.40	\$69.10	\$70.85
Ancillary bulky goods	\$76.17	\$77.32	\$79.27	\$81.28	\$83.33
Hardware	\$23.76	\$24.11	\$24.72	\$25.35	\$25.99
Takeaway liquor	\$23.68	\$24.04	\$24.65	\$25.27	\$25.91
<i>Total Grocery & Specialty</i>	<i>\$421.53</i>	<i>\$427.88</i>	<i>\$438.69</i>	<i>\$449.76</i>	<i>\$461.12</i>
<i>Total Bulky Goods</i>	<i>\$164.69</i>	<i>\$167.18</i>	<i>\$171.40</i>	<i>\$175.73</i>	<i>\$180.16</i>
<i>Total</i>	<i>\$586.22</i>	<i>\$595.06</i>	<i>\$610.08</i>	<i>\$625.49</i>	<i>\$641.28</i>
Crows Nest					
Groceries & take home food	\$171.68	\$174.27	\$178.67	\$183.18	\$187.80
Dining & takeaway food (incl. on-premise liquor)	\$54.38	\$55.20	\$56.59	\$58.02	\$59.49
Clothing, footwear & apparel	\$39.74	\$40.34	\$41.36	\$42.40	\$43.47
Personal & other goods	\$63.94	\$64.91	\$66.55	\$68.23	\$69.95
Core bulky goods	\$54.84	\$55.67	\$57.08	\$58.52	\$60.00
Ancillary bulky goods	\$63.21	\$64.16	\$65.78	\$67.44	\$69.15
Hardware	\$19.92	\$20.22	\$20.73	\$21.25	\$21.79
Takeaway liquor	\$20.84	\$21.15	\$21.68	\$22.23	\$22.79
<i>Total Grocery & Specialty</i>	<i>\$350.58</i>	<i>\$355.86</i>	<i>\$364.85</i>	<i>\$374.06</i>	<i>\$383.51</i>
<i>Total Bulky Goods</i>	<i>\$137.97</i>	<i>\$140.05</i>	<i>\$143.59</i>	<i>\$147.21</i>	<i>\$150.93</i>
<i>Total</i>	<i>\$488.55</i>	<i>\$495.92</i>	<i>\$508.44</i>	<i>\$521.28</i>	<i>\$534.44</i>
Rosalie					
Groceries & take home food	\$171.71	\$174.30	\$178.70	\$183.21	\$187.84
Dining & takeaway food (incl. on-premise liquor)	\$54.72	\$55.54	\$56.94	\$58.38	\$59.86
Clothing, footwear & apparel	\$40.07	\$40.67	\$41.70	\$42.75	\$43.83
Personal & other goods	\$64.30	\$65.27	\$66.92	\$68.61	\$70.34
Core bulky goods	\$55.16	\$55.99	\$57.40	\$58.85	\$60.34
Ancillary bulky goods	\$63.68	\$64.64	\$66.27	\$67.94	\$69.66
Hardware	\$19.99	\$20.29	\$20.80	\$21.33	\$21.86
Takeaway liquor	\$20.85	\$21.16	\$21.70	\$22.24	\$22.81
<i>Total Grocery & Specialty</i>	<i>\$351.64</i>	<i>\$356.94</i>	<i>\$365.96</i>	<i>\$375.20</i>	<i>\$384.67</i>
<i>Total Bulky Goods</i>	<i>\$138.82</i>	<i>\$140.91</i>	<i>\$144.47</i>	<i>\$148.12</i>	<i>\$151.86</i>
<i>Total</i>	<i>\$490.46</i>	<i>\$497.86</i>	<i>\$510.43</i>	<i>\$523.32</i>	<i>\$536.53</i>
Jondaryan					
Groceries & take home food	\$172.04	\$174.63	\$179.04	\$183.56	\$188.20
Dining & takeaway food (incl. on-premise liquor)	\$58.18	\$59.06	\$60.55	\$62.08	\$63.64
Clothing, footwear & apparel	\$43.41	\$44.07	\$45.18	\$46.32	\$47.49
Personal & other goods	\$67.95	\$68.97	\$70.71	\$72.50	\$74.33
Core bulky goods	\$58.39	\$59.27	\$60.76	\$62.30	\$63.87
Ancillary bulky goods	\$68.46	\$69.50	\$71.25	\$73.05	\$74.89
Hardware	\$20.66	\$20.97	\$21.50	\$22.05	\$22.60
Takeaway liquor	\$20.96	\$21.27	\$21.81	\$22.36	\$22.92
<i>Total Grocery & Specialty</i>	<i>\$362.53</i>	<i>\$368.00</i>	<i>\$377.29</i>	<i>\$386.81</i>	<i>\$396.58</i>
<i>Total Bulky Goods</i>	<i>\$147.51</i>	<i>\$149.74</i>	<i>\$153.52</i>	<i>\$157.39</i>	<i>\$161.37</i>
<i>Total</i>	<i>\$510.04</i>	<i>\$517.73</i>	<i>\$530.80</i>	<i>\$544.21</i>	<i>\$557.95</i>

	2013	2016	2021	2026	2031
Greenmount					
Groceries & take home food	\$181.84	\$184.58	\$189.24	\$194.02	\$198.92
Dining & takeaway food (incl. on-premise liquor)	\$64.85	\$65.82	\$67.49	\$69.19	\$70.94
Clothing, footwear & apparel	\$46.27	\$46.97	\$48.16	\$49.37	\$50.62
Personal & other goods	\$73.76	\$74.87	\$76.76	\$78.70	\$80.68
Core bulky goods	\$61.36	\$62.29	\$63.86	\$65.47	\$67.13
Ancillary bulky goods	\$72.12	\$73.21	\$75.06	\$76.95	\$78.89
Hardware	\$22.05	\$22.38	\$22.95	\$23.53	\$24.12
Takeaway liquor	\$22.15	\$22.48	\$23.05	\$23.63	\$24.23
<i>Total Grocery & Specialty</i>	<i>\$388.86</i>	<i>\$394.72</i>	<i>\$404.69</i>	<i>\$414.91</i>	<i>\$425.39</i>
<i>Total Bulky Goods</i>	<i>\$155.54</i>	<i>\$157.88</i>	<i>\$161.87</i>	<i>\$165.95</i>	<i>\$170.14</i>
<i>Total</i>	<i>\$544.40</i>	<i>\$552.60</i>	<i>\$566.56</i>	<i>\$580.86</i>	<i>\$595.53</i>
Pittsworth					
Groceries & take home food	\$172.00	\$174.60	\$179.01	\$183.53	\$188.16
Dining & takeaway food (incl. on-premise liquor)	\$57.83	\$58.70	\$60.18	\$61.70	\$63.26
Clothing, footwear & apparel	\$43.07	\$43.72	\$44.83	\$45.96	\$47.12
Personal & other goods	\$67.58	\$68.60	\$70.33	\$72.10	\$73.92
Core bulky goods	\$58.06	\$58.93	\$60.42	\$61.95	\$63.51
Ancillary bulky goods	\$67.98	\$69.00	\$70.74	\$72.53	\$74.36
Hardware	\$20.59	\$20.90	\$21.43	\$21.97	\$22.53
Takeaway liquor	\$20.94	\$21.26	\$21.80	\$22.35	\$22.91
<i>Total Grocery & Specialty</i>	<i>\$361.42</i>	<i>\$366.87</i>	<i>\$376.14</i>	<i>\$385.63</i>	<i>\$395.37</i>
<i>Total Bulky Goods</i>	<i>\$146.63</i>	<i>\$148.84</i>	<i>\$152.60</i>	<i>\$156.45</i>	<i>\$160.40</i>
<i>Total</i>	<i>\$508.05</i>	<i>\$515.71</i>	<i>\$528.73</i>	<i>\$542.09</i>	<i>\$555.77</i>
Millmerran					
Groceries & take home food	\$171.91	\$174.50	\$178.90	\$183.42	\$188.05
Dining & takeaway food (incl. on-premise liquor)	\$56.79	\$57.64	\$59.10	\$60.59	\$62.12
Clothing, footwear & apparel	\$42.07	\$42.70	\$43.78	\$44.88	\$46.02
Personal & other goods	\$66.48	\$67.48	\$69.19	\$70.93	\$72.72
Core bulky goods	\$57.09	\$57.95	\$59.41	\$60.91	\$62.45
Ancillary bulky goods	\$66.54	\$67.54	\$69.25	\$71.00	\$72.79
Hardware	\$20.39	\$20.70	\$21.22	\$21.76	\$22.31
Takeaway liquor	\$20.91	\$21.23	\$21.76	\$22.31	\$22.88
<i>Total Grocery & Specialty</i>	<i>\$358.15</i>	<i>\$363.55</i>	<i>\$372.73</i>	<i>\$382.14</i>	<i>\$391.79</i>
<i>Total Bulky Goods</i>	<i>\$144.02</i>	<i>\$146.19</i>	<i>\$149.88</i>	<i>\$153.66</i>	<i>\$157.55</i>
<i>Total</i>	<i>\$502.17</i>	<i>\$509.74</i>	<i>\$522.61</i>	<i>\$535.81</i>	<i>\$549.34</i>
Clifton					
Groceries & take home food	\$171.49	\$174.08	\$178.48	\$182.98	\$187.60
Dining & takeaway food (incl. on-premise liquor)	\$52.42	\$53.21	\$54.55	\$55.93	\$57.34
Clothing, footwear & apparel	\$37.85	\$38.42	\$39.39	\$40.38	\$41.40
Personal & other goods	\$61.88	\$62.81	\$64.40	\$66.02	\$67.69
Core bulky goods	\$53.02	\$53.82	\$55.17	\$56.57	\$58.00
Ancillary bulky goods	\$60.50	\$61.41	\$62.96	\$64.55	\$66.18
Hardware	\$19.54	\$19.83	\$20.33	\$20.85	\$21.37
Takeaway liquor	\$20.78	\$21.09	\$21.62	\$22.17	\$22.73
<i>Total Grocery & Specialty</i>	<i>\$344.41</i>	<i>\$349.60</i>	<i>\$358.43</i>	<i>\$367.48</i>	<i>\$376.76</i>
<i>Total Bulky Goods</i>	<i>\$133.05</i>	<i>\$135.05</i>	<i>\$138.46</i>	<i>\$141.96</i>	<i>\$145.55</i>
<i>Total</i>	<i>\$477.46</i>	<i>\$484.66</i>	<i>\$496.89</i>	<i>\$509.44</i>	<i>\$522.31</i>

Source: Australian Bureau of Statistics (2011b), Australian Bureau of Statistics (2012a)

Table C.2: Annual Available Retail Expenditure within Catchments - Detailed Tables, 2013-2031 (\$M) (2013 dollars)

	2013	2016	2021	2026	2031
Toowoomba Central					
Groceries & take home food	\$53.94	\$55.86	\$58.82	\$62.31	\$65.52
Dining & takeaway food (incl. on-premise liquor)	\$17.21	\$17.83	\$18.77	\$19.89	\$20.91
Clothing, footwear & apparel	\$12.61	\$13.06	\$13.75	\$14.57	\$15.32
Personal & other goods	\$20.23	\$20.95	\$22.05	\$23.36	\$24.57
Core bulky goods	\$17.35	\$17.97	\$18.92	\$20.04	\$21.08
Ancillary bulky goods	\$20.04	\$20.75	\$21.85	\$23.15	\$24.34
Hardware	\$6.28	\$6.51	\$6.85	\$7.26	\$7.63
Takeaway liquor	\$6.55	\$6.78	\$7.14	\$7.57	\$7.96
<i>Total Grocery & Specialty</i>	<i>\$110.54</i>	<i>\$114.48</i>	<i>\$120.54</i>	<i>\$127.70</i>	<i>\$134.27</i>
<i>Total Bulky Goods</i>	<i>\$43.67</i>	<i>\$45.23</i>	<i>\$47.62</i>	<i>\$50.45</i>	<i>\$53.05</i>
<i>Total</i>	<i>\$154.21</i>	<i>\$159.70</i>	<i>\$168.16</i>	<i>\$178.15</i>	<i>\$187.32</i>
Toowoomba North-East					
Groceries & take home food	\$44.29	\$46.08	\$48.74	\$50.69	\$53.17
Dining & takeaway food (incl. on-premise liquor)	\$16.83	\$17.51	\$18.53	\$19.27	\$20.21
Clothing, footwear & apparel	\$11.27	\$11.72	\$12.40	\$12.90	\$13.53
Personal & other goods	\$18.50	\$19.24	\$20.36	\$21.17	\$22.21
Core bulky goods	\$14.69	\$15.29	\$16.17	\$16.82	\$17.64
Ancillary bulky goods	\$17.28	\$17.98	\$19.02	\$19.78	\$20.75
Hardware	\$5.42	\$5.64	\$5.96	\$6.20	\$6.50
Takeaway liquor	\$5.39	\$5.61	\$5.93	\$6.17	\$6.47
<i>Total Grocery & Specialty</i>	<i>\$96.28</i>	<i>\$100.16</i>	<i>\$105.96</i>	<i>\$110.20</i>	<i>\$115.59</i>
<i>Total Bulky Goods</i>	<i>\$37.39</i>	<i>\$38.90</i>	<i>\$41.16</i>	<i>\$42.80</i>	<i>\$44.89</i>
<i>Total</i>	<i>\$133.67</i>	<i>\$139.06</i>	<i>\$147.12</i>	<i>\$153.00</i>	<i>\$160.48</i>
Toowoomba North-West					
Groceries & take home food	\$72.04	\$76.82	\$86.55	\$91.12	\$96.68
Dining & takeaway food (incl. on-premise liquor)	\$22.46	\$23.95	\$26.99	\$28.41	\$30.14
Clothing, footwear & apparel	\$16.33	\$17.41	\$19.62	\$20.65	\$21.91
Personal & other goods	\$26.46	\$28.21	\$31.79	\$33.47	\$35.51
Core bulky goods	\$22.68	\$24.19	\$27.25	\$28.69	\$30.44
Ancillary bulky goods	\$26.03	\$27.76	\$31.27	\$32.92	\$34.93
Hardware	\$8.29	\$8.84	\$9.96	\$10.49	\$11.13
Takeaway liquor	\$8.74	\$9.32	\$10.50	\$11.05	\$11.72
<i>Total Grocery & Specialty</i>	<i>\$146.03</i>	<i>\$155.72</i>	<i>\$175.44</i>	<i>\$184.71</i>	<i>\$195.97</i>
<i>Total Bulky Goods</i>	<i>\$57.00</i>	<i>\$60.78</i>	<i>\$68.48</i>	<i>\$72.10</i>	<i>\$76.50</i>
<i>Total</i>	<i>\$203.04</i>	<i>\$216.50</i>	<i>\$243.92</i>	<i>\$256.81</i>	<i>\$272.46</i>
Toowoomba South-East					
Groceries & take home food	\$41.90	\$43.59	\$46.12	\$47.96	\$50.31
Dining & takeaway food (incl. on-premise liquor)	\$15.30	\$15.92	\$16.84	\$17.51	\$18.37
Clothing, footwear & apparel	\$10.66	\$11.09	\$11.74	\$12.20	\$12.80
Personal & other goods	\$17.18	\$17.87	\$18.91	\$19.66	\$20.62
Core bulky goods	\$14.05	\$14.62	\$15.47	\$16.09	\$16.87
Ancillary bulky goods	\$16.52	\$17.19	\$18.19	\$18.91	\$19.84
Hardware	\$5.10	\$5.30	\$5.61	\$5.83	\$6.12
Takeaway liquor	\$5.10	\$5.31	\$5.62	\$5.84	\$6.13
<i>Total Grocery & Specialty</i>	<i>\$90.15</i>	<i>\$93.78</i>	<i>\$99.21</i>	<i>\$103.18</i>	<i>\$108.23</i>
<i>Total Bulky Goods</i>	<i>\$35.67</i>	<i>\$37.11</i>	<i>\$39.26</i>	<i>\$40.83</i>	<i>\$42.83</i>
<i>Total</i>	<i>\$125.82</i>	<i>\$130.89</i>	<i>\$138.48</i>	<i>\$144.01</i>	<i>\$151.05</i>

	2013	2016	2021	2026	2031
Toowoomba West					
Groceries & take home food	\$90.51	\$96.46	\$108.71	\$124.23	\$137.90
Dining & takeaway food (incl. on-premise liquor)	\$28.41	\$30.28	\$34.12	\$38.99	\$43.28
Clothing, footwear & apparel	\$20.70	\$22.06	\$24.86	\$28.41	\$31.54
Personal & other goods	\$33.44	\$35.64	\$40.16	\$45.90	\$50.95
Core bulky goods	\$28.67	\$30.56	\$34.44	\$39.35	\$43.68
Ancillary bulky goods	\$32.96	\$35.13	\$39.59	\$45.24	\$50.22
Hardware	\$10.45	\$11.14	\$12.55	\$14.35	\$15.93
Takeaway liquor	\$10.98	\$11.70	\$13.19	\$15.07	\$16.73
<i>Total Grocery & Specialty</i>	<i>\$184.03</i>	<i>\$196.13</i>	<i>\$221.04</i>	<i>\$252.59</i>	<i>\$280.39</i>
<i>Total Bulky Goods</i>	<i>\$72.09</i>	<i>\$76.83</i>	<i>\$86.58</i>	<i>\$98.94</i>	<i>\$109.83</i>
<i>Total</i>	<i>\$256.11</i>	<i>\$272.96</i>	<i>\$307.62</i>	<i>\$351.54</i>	<i>\$390.22</i>
Highfields					
Groceries & take home food	\$46.37	\$53.87	\$66.92	\$84.50	\$106.04
Dining & takeaway food (incl. on-premise liquor)	\$18.25	\$21.21	\$26.34	\$33.26	\$41.74
Clothing, footwear & apparel	\$11.80	\$13.71	\$17.03	\$21.50	\$26.98
Personal & other goods	\$19.69	\$22.88	\$28.42	\$35.88	\$45.03
Core bulky goods	\$15.23	\$17.69	\$21.98	\$27.75	\$34.83
Ancillary bulky goods	\$17.93	\$20.83	\$25.87	\$32.67	\$40.99
Hardware	\$5.70	\$6.62	\$8.23	\$10.39	\$13.04
Takeaway liquor	\$5.64	\$6.56	\$8.14	\$10.28	\$12.90
<i>Total Grocery & Specialty</i>	<i>\$101.76</i>	<i>\$118.22</i>	<i>\$146.86</i>	<i>\$185.43</i>	<i>\$232.69</i>
<i>Total Bulky Goods</i>	<i>\$38.86</i>	<i>\$45.14</i>	<i>\$56.08</i>	<i>\$70.81</i>	<i>\$88.85</i>
<i>Total</i>	<i>\$140.62</i>	<i>\$163.36</i>	<i>\$202.93</i>	<i>\$256.24</i>	<i>\$321.54</i>
Gowrie					
Groceries & take home food	\$19.35	\$21.86	\$26.31	\$31.32	\$36.69
Dining & takeaway food (incl. on-premise liquor)	\$7.07	\$7.99	\$9.61	\$11.44	\$13.40
Clothing, footwear & apparel	\$4.92	\$5.56	\$6.69	\$7.97	\$9.34
Personal & other goods	\$7.93	\$8.96	\$10.79	\$12.84	\$15.05
Core bulky goods	\$6.49	\$7.33	\$8.82	\$10.50	\$12.31
Ancillary bulky goods	\$7.63	\$8.62	\$10.37	\$12.35	\$14.47
Hardware	\$2.35	\$2.66	\$3.20	\$3.81	\$4.46
Takeaway liquor	\$2.36	\$2.66	\$3.20	\$3.81	\$4.47
<i>Total Grocery & Specialty</i>	<i>\$41.63</i>	<i>\$47.04</i>	<i>\$56.60</i>	<i>\$67.39</i>	<i>\$78.95</i>
<i>Total Bulky Goods</i>	<i>\$16.47</i>	<i>\$18.61</i>	<i>\$22.39</i>	<i>\$26.66</i>	<i>\$31.24</i>
<i>Total</i>	<i>\$58.10</i>	<i>\$65.65</i>	<i>\$79.00</i>	<i>\$94.06</i>	<i>\$110.19</i>
Westbrook					
Groceries & take home food	\$34.01	\$39.62	\$50.69	\$63.07	\$76.79
Dining & takeaway food (incl. on-premise liquor)	\$13.48	\$15.70	\$20.09	\$25.00	\$30.43
Clothing, footwear & apparel	\$8.65	\$10.08	\$12.90	\$16.05	\$19.54
Personal & other goods	\$14.49	\$16.88	\$21.59	\$26.87	\$32.71
Core bulky goods	\$11.15	\$12.99	\$16.61	\$20.67	\$25.17
Ancillary bulky goods	\$13.12	\$15.29	\$19.56	\$24.34	\$29.63
Hardware	\$4.19	\$4.88	\$6.24	\$7.76	\$9.45
Takeaway liquor	\$4.14	\$4.82	\$6.17	\$7.67	\$9.34
<i>Total Grocery & Specialty</i>	<i>\$74.77</i>	<i>\$87.10</i>	<i>\$111.43</i>	<i>\$138.66</i>	<i>\$168.81</i>
<i>Total Bulky Goods</i>	<i>\$28.46</i>	<i>\$33.15</i>	<i>\$42.41</i>	<i>\$52.77</i>	<i>\$64.25</i>
<i>Total</i>	<i>\$103.23</i>	<i>\$120.25</i>	<i>\$153.84</i>	<i>\$191.43</i>	<i>\$233.05</i>

	2013	2016	2021	2026	2031
Cambooya					
Groceries & take home food	\$17.97	\$21.09	\$26.30	\$32.66	\$39.80
Dining & takeaway food (incl. on-premise liquor)	\$6.74	\$7.92	\$9.87	\$12.26	\$14.94
Clothing, footwear & apparel	\$4.57	\$5.37	\$6.69	\$8.31	\$10.13
Personal & other goods	\$7.46	\$8.76	\$10.92	\$13.56	\$16.53
Core bulky goods	\$5.98	\$7.02	\$8.75	\$10.87	\$13.25
Ancillary bulky goods	\$7.03	\$8.26	\$10.30	\$12.79	\$15.58
Hardware	\$2.19	\$2.58	\$3.21	\$3.99	\$4.86
Takeaway liquor	\$2.19	\$2.57	\$3.20	\$3.98	\$4.85
<i>Total Grocery & Specialty</i>	<i>\$38.93</i>	<i>\$45.70</i>	<i>\$56.98</i>	<i>\$70.77</i>	<i>\$86.24</i>
<i>Total Bulky Goods</i>	<i>\$15.21</i>	<i>\$17.85</i>	<i>\$22.26</i>	<i>\$27.65</i>	<i>\$33.70</i>
<i>Total</i>	<i>\$54.14</i>	<i>\$63.55</i>	<i>\$79.25</i>	<i>\$98.43</i>	<i>\$119.94</i>
Crows Nest					
Groceries & take home food	\$16.96	\$19.49	\$23.80	\$29.79	\$36.69
Dining & takeaway food (incl. on-premise liquor)	\$5.37	\$6.17	\$7.54	\$9.44	\$11.62
Clothing, footwear & apparel	\$3.93	\$4.51	\$5.51	\$6.90	\$8.49
Personal & other goods	\$6.32	\$7.26	\$8.86	\$11.10	\$13.66
Core bulky goods	\$5.42	\$6.23	\$7.60	\$9.52	\$11.72
Ancillary bulky goods	\$6.24	\$7.18	\$8.76	\$10.97	\$13.51
Hardware	\$1.97	\$2.26	\$2.76	\$3.46	\$4.26
Takeaway liquor	\$2.06	\$2.37	\$2.89	\$3.62	\$4.45
<i>Total Grocery & Specialty</i>	<i>\$34.63</i>	<i>\$39.80</i>	<i>\$48.60</i>	<i>\$60.84</i>	<i>\$74.92</i>
<i>Total Bulky Goods</i>	<i>\$13.63</i>	<i>\$15.66</i>	<i>\$19.13</i>	<i>\$23.94</i>	<i>\$29.48</i>
<i>Total</i>	<i>\$48.26</i>	<i>\$55.47</i>	<i>\$67.73</i>	<i>\$84.79</i>	<i>\$104.40</i>
Rosalie					
Groceries & take home food	\$16.99	\$18.14	\$19.98	\$22.07	\$24.35
Dining & takeaway food (incl. on-premise liquor)	\$5.41	\$5.78	\$6.37	\$7.03	\$7.76
Clothing, footwear & apparel	\$3.96	\$4.23	\$4.66	\$5.15	\$5.68
Personal & other goods	\$6.36	\$6.79	\$7.48	\$8.26	\$9.12
Core bulky goods	\$5.46	\$5.83	\$6.42	\$7.09	\$7.82
Ancillary bulky goods	\$6.30	\$6.73	\$7.41	\$8.18	\$9.03
Hardware	\$1.98	\$2.11	\$2.33	\$2.57	\$2.83
Takeaway liquor	\$2.06	\$2.20	\$2.43	\$2.68	\$2.96
<i>Total Grocery & Specialty</i>	<i>\$34.80</i>	<i>\$37.15</i>	<i>\$40.92</i>	<i>\$45.19</i>	<i>\$49.87</i>
<i>Total Bulky Goods</i>	<i>\$13.74</i>	<i>\$14.67</i>	<i>\$16.15</i>	<i>\$17.84</i>	<i>\$19.69</i>
<i>Total</i>	<i>\$48.53</i>	<i>\$51.82</i>	<i>\$57.07</i>	<i>\$63.03</i>	<i>\$69.56</i>
Jondaryan					
Groceries & take home food	\$22.61	\$24.08	\$26.76	\$29.81	\$32.90
Dining & takeaway food (incl. on-premise liquor)	\$7.65	\$8.14	\$9.05	\$10.08	\$11.13
Clothing, footwear & apparel	\$5.70	\$6.08	\$6.75	\$7.52	\$8.30
Personal & other goods	\$8.93	\$9.51	\$10.57	\$11.77	\$13.00
Core bulky goods	\$7.67	\$8.17	\$9.08	\$10.12	\$11.17
Ancillary bulky goods	\$9.00	\$9.58	\$10.65	\$11.86	\$13.09
Hardware	\$2.72	\$2.89	\$3.21	\$3.58	\$3.95
Takeaway liquor	\$2.75	\$2.93	\$3.26	\$3.63	\$4.01
<i>Total Grocery & Specialty</i>	<i>\$47.64</i>	<i>\$50.75</i>	<i>\$56.40</i>	<i>\$62.81</i>	<i>\$69.34</i>
<i>Total Bulky Goods</i>	<i>\$19.38</i>	<i>\$20.65</i>	<i>\$22.95</i>	<i>\$25.56</i>	<i>\$28.21</i>
<i>Total</i>	<i>\$67.03</i>	<i>\$71.40</i>	<i>\$79.35</i>	<i>\$88.37</i>	<i>\$97.55</i>

	2013	2016	2021	2026	2031
Greenmount					
Groceries & take home food	\$8.44	\$9.48	\$11.03	\$13.00	\$15.01
Dining & takeaway food (incl. on-premise liquor)	\$3.01	\$3.38	\$3.93	\$4.64	\$5.35
Clothing, footwear & apparel	\$2.15	\$2.41	\$2.81	\$3.31	\$3.82
Personal & other goods	\$3.42	\$3.85	\$4.47	\$5.27	\$6.09
Core bulky goods	\$2.85	\$3.20	\$3.72	\$4.39	\$5.06
Ancillary bulky goods	\$3.35	\$3.76	\$4.38	\$5.16	\$5.95
Hardware	\$1.02	\$1.15	\$1.34	\$1.58	\$1.82
Takeaway liquor	\$1.03	\$1.15	\$1.34	\$1.58	\$1.83
<i>Total Grocery & Specialty</i>	<i>\$18.05</i>	<i>\$20.28</i>	<i>\$23.59</i>	<i>\$27.80</i>	<i>\$32.09</i>
<i>Total Bulky Goods</i>	<i>\$7.22</i>	<i>\$8.11</i>	<i>\$9.44</i>	<i>\$11.12</i>	<i>\$12.84</i>
<i>Total</i>	<i>\$25.27</i>	<i>\$28.39</i>	<i>\$33.03</i>	<i>\$38.92</i>	<i>\$44.93</i>
Pittsworth					
Groceries & take home food	\$17.59	\$19.09	\$21.58	\$24.30	\$27.32
Dining & takeaway food (incl. on-premise liquor)	\$5.91	\$6.42	\$7.26	\$8.17	\$9.18
Clothing, footwear & apparel	\$4.40	\$4.78	\$5.40	\$6.08	\$6.84
Personal & other goods	\$6.91	\$7.50	\$8.48	\$9.55	\$10.73
Core bulky goods	\$5.94	\$6.44	\$7.29	\$8.20	\$9.22
Ancillary bulky goods	\$6.95	\$7.55	\$8.53	\$9.60	\$10.80
Hardware	\$2.11	\$2.29	\$2.58	\$2.91	\$3.27
Takeaway liquor	\$2.14	\$2.32	\$2.63	\$2.96	\$3.33
<i>Total Grocery & Specialty</i>	<i>\$36.95</i>	<i>\$40.12</i>	<i>\$45.35</i>	<i>\$51.05</i>	<i>\$57.40</i>
<i>Total Bulky Goods</i>	<i>\$14.99</i>	<i>\$16.28</i>	<i>\$18.40</i>	<i>\$20.71</i>	<i>\$23.29</i>
<i>Total</i>	<i>\$51.94</i>	<i>\$56.39</i>	<i>\$63.75</i>	<i>\$71.76</i>	<i>\$80.68</i>
Millmerran					
Groceries & take home food	\$11.57	\$12.41	\$13.66	\$14.98	\$16.38
Dining & takeaway food (incl. on-premise liquor)	\$3.82	\$4.10	\$4.51	\$4.95	\$5.41
Clothing, footwear & apparel	\$2.83	\$3.04	\$3.34	\$3.67	\$4.01
Personal & other goods	\$4.48	\$4.80	\$5.28	\$5.79	\$6.34
Core bulky goods	\$3.84	\$4.12	\$4.54	\$4.97	\$5.44
Ancillary bulky goods	\$4.48	\$4.80	\$5.29	\$5.80	\$6.34
Hardware	\$1.37	\$1.47	\$1.62	\$1.78	\$1.94
Takeaway liquor	\$1.41	\$1.51	\$1.66	\$1.82	\$1.99
<i>Total Grocery & Specialty</i>	<i>\$24.11</i>	<i>\$25.85</i>	<i>\$28.46</i>	<i>\$31.21</i>	<i>\$34.13</i>
<i>Total Bulky Goods</i>	<i>\$9.69</i>	<i>\$10.40</i>	<i>\$11.44</i>	<i>\$12.55</i>	<i>\$13.72</i>
<i>Total</i>	<i>\$33.80</i>	<i>\$36.25</i>	<i>\$39.90</i>	<i>\$43.76</i>	<i>\$47.86</i>
Clifton					
Groceries & take home food	\$10.78	\$11.24	\$12.03	\$12.87	\$13.67
Dining & takeaway food (incl. on-premise liquor)	\$3.29	\$3.44	\$3.68	\$3.93	\$4.18
Clothing, footwear & apparel	\$2.38	\$2.48	\$2.66	\$2.84	\$3.02
Personal & other goods	\$3.89	\$4.06	\$4.34	\$4.64	\$4.93
Core bulky goods	\$3.33	\$3.48	\$3.72	\$3.98	\$4.22
Ancillary bulky goods	\$3.80	\$3.97	\$4.24	\$4.54	\$4.82
Hardware	\$1.23	\$1.28	\$1.37	\$1.47	\$1.56
Takeaway liquor	\$1.31	\$1.36	\$1.46	\$1.56	\$1.66
<i>Total Grocery & Specialty</i>	<i>\$21.65</i>	<i>\$22.58</i>	<i>\$24.16</i>	<i>\$25.84</i>	<i>\$27.44</i>
<i>Total Bulky Goods</i>	<i>\$8.36</i>	<i>\$8.72</i>	<i>\$9.33</i>	<i>\$9.98</i>	<i>\$10.60</i>
<i>Total</i>	<i>\$30.01</i>	<i>\$31.31</i>	<i>\$33.50</i>	<i>\$35.83</i>	<i>\$38.05</i>

Source: Economic Associates estimates

APPENDIX D

COMPARISON BETWEEN 2009 AND 2013 CENTRES HIERARCHY RECOMMENDATIONS

Table D.1: Comparison between 2009 and 2013 Findings for Activity Centres, Toowoomba Regional Council

Centre Name	Position in Network	Economic Associates - 2013			Urban Economics - 2009		
		Additional Floor Space Required (sqm)			Additional Floor Space Required (sqm)		
		Retail	Bulky Goods	Office	Retail	Bulky Goods	Office
Regional Centre		33,650	17,600	40,500	70,000	20,000	40,000 - 60,000
Toowoomba CBD	Principal Activity Centre	33,650	17,600	40,500	70,000	20,000	40,000 - 60,000
Urban Centres		38,950	55,850	27,500	60,900	50,120	35,300
Highfields Town Centre	Major Urban Activity Centre	16,700	8,350	11,500	15,000	5,000	7,000
Kearneys Spring	Major Urban Activity Centre	3,550	-	7,250	15,000	22,000	14,000
Wilsonton	Major Urban Activity Centre	2,350	2,600	4,150	10,000	3,000	8,000
Clifford Gardens	Major Urban Activity Centre	-	-	1,550	-	-	3,000
Highfields Plaza	District Urban Activity Centre	-	-	-	-	-	-
Bridge Street Plaza	District Urban Activity Centre	400	-	200	1,000	-	300
Wylla Plaza	District Urban Activity Centre	200	-	-	500	-	-
Newtown Shopping Centre	District Urban Activity Centre	200	-	150	500	-	200
The Range	District Urban Activity Centre	-	-	-	-	-	-
High Street Plaza	District Urban Activity Centre	200	-	-	500	-	-
West Ridge	District Urban Activity Centre	400	-	-	1,000	-	-
Glenvale	District Urban Activity Centre	3,200	3,550	400	4,850	120	300
Harlaxton	District Urban Activity Centre	-	-	-	-	-	-
Westbrook	District Urban Activity Centre	5,550	2,400	400	-	-	-
Gowrie	Neighbourhood Urban Activity Centre	1,250	950	200	400	-	-
North Ridge	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Northlands	Neighbourhood Urban Activity Centre	400	-	150	1,000	200	-
Mort Estate	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Newtown Parkside	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Mary Street Village	Neighbourhood Urban Activity Centre	200	-	-	500	-	-
Mackenzie Row	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Tor Centre	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Tor Street	Neighbourhood Urban Activity Centre	250	-	150	650	-	200
Ruthven Central	Neighbourhood Urban Activity Centre	150	-	-	1,000	-	300
Harristown	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Tower Shopping Village	Neighbourhood Urban Activity Centre	400	-	200	1,000	-	300
Centenary Heights / Southtown	Neighbourhood Urban Activity Centre	200	-	-	500	-	-
South Toowoomba	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Macdonald Town	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Foodworks on Mackenzie	Neighbourhood Urban Activity Centre	600	-	150	1,500	-	200
Drayton	Neighbourhood Urban Activity Centre	1,100	-	150	2,600	-	200

Centre Name	Position in Network	Economic Associates - 2013			Urban Economics - 2009		
		Additional Floor Space Required (sqm)			Additional Floor Space Required (sqm)		
		Retail	Bulky Goods	Office	Retail	Bulky Goods	Office
Middle Range Village	Neighbourhood Urban Activity Centre	-	-	-	-	-	-
Uni Plaza	Neighbourhood Urban Activity Centre	1,250	-	250	3,000	-	400
Fantastic Furniture	Specialist Urban Retail Centre	-	-	-	-	-	-
Bunnings	Specialist Urban Retail Centre	-	-	-	-	-	-
New Bulky Goods Centre	Specialist Urban Retail Centre	400	38,000	650	1,000	20,000	1,000
Rural Centres		12,900	7,250	5,750	4,500	3,500	2,600
Oakey	Major Rural Activity Centre	-	-	1,900	1,000	1,000	1,000
Pittsworth	Major Rural Activity Centre	-	-	1,900	1,000	1,000	1,000
Crows Nest	Major Rural Activity Centre	800	1,100	400	1,000	500	200
Millmerran	Major Rural Activity Centre	-	-	-	500	500	400
Clifton	Major Rural Activity Centre	-	-	-	1,000	500	-
Cambooya	Local Rural Activity Centre	4,850	2,150	550	-	-	-
Wyreema	Local Rural Activity Centre	2,100	950	400	-	-	-
Kingsthorpe	Local Rural Activity Centre	2,500	1,900	200	-	-	-
Greenmount	Local Rural Activity Centre	2,650	1,150	400	-	-	-
Yarraman	Local Rural Activity Centre	-	-	-	-	-	-
Goombungee	Local Rural Activity Centre	-	-	-	-	-	-
MacLagan	Local Rural Activity Centre	-	-	-	-	-	-
Peranga	Local Rural Activity Centre	-	-	-	-	-	-
Bowenville	Local Rural Activity Centre	-	-	-	-	-	-
Cooyar	Local Rural Activity Centre	-	-	-	-	-	-
Quinalow	Local Rural Activity Centre	-	-	-	-	-	-
Kulpi	Local Rural Activity Centre	-	-	-	-	-	-
Haden	Local Rural Activity Centre	-	-	-	-	-	-
Hampton	Local Rural Activity Centre	-	-	-	-	-	-
Jondaryan	Local Rural Activity Centre	-	-	-	-	-	-
Meringandan West	Local Rural Activity Centre	-	-	-	-	-	-
Meringandan	Local Rural Activity Centre	-	-	-	-	-	-
Cecil Plains	Local Rural Activity Centre	-	-	-	-	-	-
Mt Tyson	Local Rural Activity Centre	-	-	-	-	-	-
Southbrook	Local Rural Activity Centre	-	-	-	-	-	-
Brookstead	Local Rural Activity Centre	-	-	-	-	-	-
Nobby	Local Rural Activity Centre	-	-	-	-	-	-