

DEMAND ANALYSIS

COMMERCIAL AND INDUSTRIAL LAND, GOONDIWINDI

Client:

Goondiwindi Regional Council

Prepared by:



ABN 59 111 542 673

Suite 31, Level 4
50-56 Sanders Street
UPPER MT GRAVATT, QLD, 4122

Ph: (07) 3422 2011

Fax: (07) 3422 0899

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Disclaimer

The sole purpose of this report is to provide Goondiwindi Regional Council (the Client) with information in accordance with Foresight Partners Pty Ltd's scope of services set out in its proposal to the Client.

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Summary

In March 2008 the former Goondiwindi Town Council and Inglewood and Waggamba Shire Councils amalgamated to form the Goondiwindi Regional Council (GRC). As a result of this amalgamation, Goondiwindi Regional Council has initiated a review of the former planning schemes to provide forward planning direction for the regional council area.

This report represents a *Commercial and Industrial Land Demand Assessment* and is one of the required background planning studies for preparation of a new Planning Scheme for the Goondiwindi region.

Goondiwindi Catchment – definition and population projections

Goondiwindi is the major urban centre within Goondiwindi Regional Council area, containing most of the region's industrial, commercial and retail activities. The retail, commercial and industrial catchments for Goondiwindi extend beyond the regional council area into northern New South Wales. This catchment is used for the population, expenditure and land demand analysis in this report.

The catchment is separated into three areas:

- Goondiwindi Township;
- the remainder of the Goondiwindi Regional Council area; and
- a Northern NSW component.

As at the 2006 Census there were approximately 12,900 persons living within the catchment:

- 6,000 in Goondiwindi Township;
- 4,740 in the remainder of GRC, and
- 2,160 in the northern NSW component of the catchment.

Medium and high series population projections anticipate population growth of approximately 1,260 and 2,570 persons respectively between 2011 and 2031. Most of the growth is anticipated to occur within Goondiwindi Township.

The level of population growth suggests that future increases in retail, commercial, industrial and other economic activity, and the future lands needed to cater to population driven demand to 2031, are likely to be incremental rather than substantial in nature.

Retail and commercial composition

Goondiwindi's retail and commercial facilities are largely concentrated in a compact, three block section of Marshall Street, and the town centre appears vibrant and healthy, with few vacant premises. The town's retail composition indicates that it is strongly convenience-orientated but also offers a sufficient range of apparel and homewares to satisfy most, but not all, household shopping needs.

In August 2010 Foresight Partners undertook a detailed field inventory of retail and commercial activity within the Goondiwindi Township, classifying businesses according to the 2006 ANZSIC classifications. The inventory identified nearly 55,000m² of gross floor area, although only about 42,000m² was included in the analysis of retail and commercial activities:

- a total of 154 retail and commercial tenancies occupying just over 39,000m² of gross floor area;
- nearly 24,600m² of which is retail, with most of this (80 shops and 22,800m²) located in the town centre area; and
- an additional 2,660m² in 18 vacant tenancies.

Approximately 13,000m² (10,000m² of which is in the town centre) was estimated for a small number businesses excluded from the floorspace analysis. These exclusions consisted of petrol stations, car dealerships, motels, hotels and pubs/taverns, as their floorspace usage is not generally comparable with other retail and commercial activities.

Retail and commercial land supply

The August 2010 inventory also identified;

- a total of 75ha of Commercial zoned land within Goondiwindi—17.9ha in the town centre and 57.5ha in the highway precinct;
- of the 17.9ha of commercial zoned land in the town centre, less than 1ha in seven lots is vacant, with a further 65 lots (about 6ha) classified as underdeveloped as they have residential dwellings or old sheds on them and are potentially capable for redevelopment for commercial uses;
- an additional 20ha of land that is not zoned commercial, but either Urban or Industrial, that has commercial activities on it; and
- 37.2ha of additional vacant commercial zoned land in the Highway Commercial precinct along the Cunningham Highway, although the nature of the businesses in this area is quite different (truckstop, light industry, McDonalds and a motel).

Industrial composition

Goondiwindi Township's industrial business inventory indicates a broad industrial base with no obvious or unexpected gaps (e.g. mining). Wholesale Trade, Transport, Postal and Warehousing, and Manufacturing are dominant in terms of number of firms but many are related to, or support, agricultural production.

The location of industrial businesses in Goondiwindi is somewhat fragmented. There are businesses located in a few separate Industrial zoned areas, as well as within the Urban and Commercial zoned areas. The August 2010 inventory identified a total of 128 industrial businesses/activities in Goondiwindi occupying approximately 247.2ha, including industrial activities occurring outside industrial zoned land.

The largest industry sectors in terms of number of businesses are:

- Wholesale Trade—32 businesses, accounting for 25% of industrial businesses and 15% of land occupied for industrial purposes;
- Other Services—24 businesses (mainly involved in the repair and/or maintenance of automotives, equipment and machinery) accounting for 19% of industrial businesses but only 3% of land; and
- Transport, Postal and Warehousing and Manufacturing (each with 16 businesses and collectively accounting for 25% of industrial businesses), but with Transport, Postal and Warehousing (which includes grain storage) occupying 25% of the 247ha of occupied land compared to just 5% for Manufacturing.

Together these four sectors account for around two thirds (69%) of all industrial businesses in Goondiwindi and 48% of all land used for industrial purposes. Excluding the MacIntyre Cotton Gin, which occupies about 101ha, Transport, Postal and Warehousing, and Wholesale Trade account for about two-thirds of all land used for industrial purposes.

The largest industrial sector in terms of land area used is Agriculture, Forestry and Fishing, which uses over 40% of Goondiwindi's occupied industrial land. There are six businesses, including the cotton gin, in this category, all in Agriculture Support Services.

Industrial land supply

Goondiwindi Township has a total zoned industrial land supply of 749ha, including the 160ha aerodrome. Of this, about 313ha is vacant and 34ha is underdeveloped. However, over half of this vacant land (170ha) is in a single large land holding on Boundary Road.

- The Township has ample vacant industrial land but very little of it is serviced or subdivided into smaller lots, with only about 7ha (16 lots) of less than a hectare.
- Thus, despite a very large potential supply of vacant land, it has relatively little land market-ready for firms seeking smaller, serviced lots. In smaller markets such as Goondiwindi, this can be a significant constraint, especially where vacant land holdings are in larger parcels.
- Council's Mixed Use zone, which allows small scale industrial uses in conjunction with residential, appears to fill a need, especially for small home-based enterprises and seasonal support industries. It probably also serves as a business incubator.
- Vacant land sales have averaged about 10ha *per annum* (excluding resales) over the past ten years, but this is a poor indicator of land take-up as most of this land remains vacant and still part of the potential supply.

- The median prices per square metre achieved for Goondiwindi Township's vacant industrial land have been relatively stable over time, suggesting no significant demand-generated market pressure for, or perceived shortages of, industrial land.

Future retail and commercial land demand

- The relatively modest population growth projected for Goondiwindi's catchment to 2031, even under the high series projections, suggest that population increases are unlikely to generate demand for major additions to its retail facilities, such as a discount department store or third major supermarket, or significantly uplift its present role and function to a higher order centre of retail and commercial activity.
- Future additions to Goondiwindi Township's retail provision are likely to be modest and readily accommodated within the existing town centre's zoned commercial area. Existing retailers will seek to improve their performance by capturing future increases in spending. Future growth in spending will be needed to help retain and strengthen existing traders within the Township, as well as support new specialty additions.
- Future demand for office and other commercial floorspace is likewise modest and can be accommodated within existing zoned land through redevelopment of existing sites and two storey development.
- There does not appear to be any need to extend the Township's Commercial zone to accommodate future retail and commercial development.

Future industrial land demand

Over the ten years from 2000 to 2009, 27 recorded sales of vacant industrial land totalled 102ha (excluding resales), which is an average of about 10ha a year. This past demand would usually be considered a good 'proxy' for projecting future take-up. However, of this 102ha of vacant land recorded as sold over the past ten years, 94ha remains vacant. If only the land that is sold and subsequently developed is used it implies an average annual take-up of only 0.8ha per year.

- Future population and employment growth is likely to require only about 15–40ha of industrial land over the next 20 years.
- Goondiwindi Township area, with over 300ha of vacant zoned industrial land, has more than enough land to provide for its future needs.
- However, very little of this vacant land is appropriately subdivided and serviced to accommodate future growth.

Implications and opportunities

The detailed land inventory, land sales history and take-up rates, and population and employment forecasts indicate that current supplies of zoned commercial and industrial land are more than adequate to meet Goondiwindi's future needs over the forecast period to 2031.

Commercial

- Although there is limited vacant land in the town centre area (less than a hectare) to accommodate future retail and commercial development, the area has sufficient under-developed land (about 6-7Ha) to enable opportunities for site amalgamation and redevelopment, should future market demand warrant it. There does not appear to be any particular supply-demand issues in the town centre area, and there is no apparent need to extend the zoning in anticipation of future demand.
- If desirable new retail or commercial opportunities do arise and cannot be accommodated in the existing town centre, the next best option is to extend the boundaries so that the commercial area remains continuous, rather than fragment it with 'gaps'. Zone boundaries could be extended along Marshall Street, although this would reduce the compactness of the town centre and reduce its pedestrian-friendliness.
- Should a new major supermarket or discount department store be allowed to locate outside the town centre area, impacts upon the overall vitality and viability of Goondiwindi's core or main street retail precinct would be severe and long-lasting. These stores are major customer trip generators and would divert a substantial amount of customer traffic and spending away from the town centre. Projected growth in population and retail spending is simply too low to ameliorate such impacts upon the town centre.
- Access constraints to the Cunningham Highway suggest that additional development of the Highway Commercial Precinct for commercial-light industry type uses appears compromised. Consequently, the highest and best future uses of the remainder of the precinct might be for a mix of appropriately buffered residential, recreational and community uses which could be accessed by existing roads (e.g. Lamberth Road and Johnston Road).
- Future commercial and retail employment generating opportunities are likely to be incremental, as these are largely driven by population growth. Ageing of the population and workforce over the next 20 years is likely to constrain opportunities for significant new commercial and retail development.

- However, demand and opportunities for employment in aged care and allied health services should increase. Retirement housing, nursing homes and in-home care and services should create new jobs, but these jobs are unlikely to stimulate demand for additional office or retail floorspace or commercial zoned land.

Industrial

Although Goondiwindi appears to have ample vacant Industrial zoned land of over 300ha to meet demand for both large and small industrial lots over the next 20 years, the ‘adequacy’ of this supply is not without some constraints.

- The supply of market-ready land (i.e. subdivided and serviced) is limited, especially for smaller lots, which constrains Goondiwindi’s ability to attract new businesses.
- While there is no evidence that the town is experiencing significant ‘turn-away’ of potential employment generating business opportunities because of a lack of suitable sites, the small size and slow movement of Goondiwindi’s industrial market suggests that it cannot afford to let any reasonable employment-generating opportunity slip away.
- It is not economically practical for owners to subdivide available large parcels (e.g., ten to 170 hectares) to create and service a few smaller lots of 2,000-4,000m² at a time, as demand can be sporadic and for perhaps only one or two lots a year. Site fill (if needed), on-site firefighting requirements and other development costs associated with unserviced land further constrain market action.
- Potential solutions in overcoming this ‘chicken and egg’ situation to ensure a better market ready supply of smaller, serviced lots could include:
 - Council use part of its 160ha aerodrome land holdings to develop a small industrial estate offering smaller serviced lots of 2,000-4,000m². This area need not be large (even five hectares could make a difference) nor should it seek to displace or compete with future private sector initiatives.
 - Council and owners of key land parcels work towards some form of public-private partnership to advance the subdivision and servicing of at least parts of key landholdings by extending services—mainly reticulated water.
 - Ironically, another potential solution to increasing market-ready supply of smaller lots would be to rezone additional land. Council might consider rezoning some additional land in strategic locations, if its owners are capable and committed to working with Council to subdivide and service this land to increase the market ready supply of smaller lots.

- Provided all or most of the current zoned industrial land can be preserved, there should be no need for Council to provide for additional industrial land outside of the Boundary Road corridor area over the forecast period.
- Goondiwindi's economic base and industry structure is strongly tied to agriculture, warehousing and transport, with some manufacturing and this relative mix is unlikely to change significantly over the next 20 years. The town is mature and well-established, with no obvious market gaps in its industrial profile.
- Future sources of employment generating industrial activities and industrial land will most likely come from internal growth of existing businesses and some new market entrants (start up firms), with the Mixed Use area potentially acting as an incubator. Small businesses create many more jobs than big businesses.
- Small scale manufacturing, mainly related to agri-business, but also niche or specialist products and parts, are found in numerous non-metropolitan cities and towns, and represent a future opportunity for Goondiwindi, with lifestyle a major attraction for such enterprises.
- Rural towns such as Goondiwindi generally do not have the population base, depth of skills and proximity to major transport infrastructure (airports and ports) to compete for many employment-generating commercial and industrial employment activities. Generating and keeping industrial and commercial firms alive and well in smaller cities and towns is an on-going battle that is neither new nor specific to Goondiwindi. Goondiwindi in fact appears to have done well compared with many other (non-mining/energy-based) rural towns.
- Ideas for future new business opportunities, or improvements in existing business operations in smaller towns almost always arise from the creativity, experience and knowledge of its own citizens and entrepreneurs, rather than governments (or outside consultants).
- Council can best foster future commercial and industrial opportunities for Goondiwindi by ensuring its planning and approval processes are efficient and speedy and provide certainty. It needs to maintain a proactive and business-friendly, rather than simply a regulatory, approach to new private sector ventures and ideas.
- Although it must operate, as with all Queensland Councils, within a State planning framework, Councils with efficient planning and approval processes can have a competitive advantage over less efficient ones. This is particularly important in retaining existing businesses seeking to grow, as well as attracting new businesses from outside the Goondiwindi region.

- Council can assist existing firms grow internally by easing bureaucratic burdens, facilitate networking opportunities through its State and Commonwealth contacts and the Border Rivers Chamber of Commerce, and ensure suitable land and infrastructure is in place to capture opportunities as they arise.

1 Introduction

In March 2008 the former Goondiwindi Town Council and Inglewood and Waggamba Shire Councils amalgamated to form the Goondiwindi Regional Council (GRC). As a result of this amalgamation, Goondiwindi Regional Council has initiated a review of the former planning schemes to provide forward planning direction for the regional council area.

The overall purpose of the service is to prepare a coherent and integrated Planning Scheme for the Goondiwindi region. In order to achieve this overall aim, a number of background studies are required to inform the preparation of the new Goondiwindi Region Planning Scheme. These background studies assist in preparing the underlying land use strategy for the region and support the measures adopted in the planning scheme.

This *Commercial and Industrial Land Demand Assessment* report is one of the required background planning studies.

1.1 PURPOSE OF REPORT

Council identifies that the planning of industrial and commercial land use in and around Goondiwindi has been adversely affected by the fragmentation of these land uses under the former Goondiwindi Town Council and Waggamba Shire Council. This could become an issue in managing future growth, particularly as oil and gas developments in the nearby Surat Basin progress. In order to plan for potential future development, Council requires a better understanding of its current land supply-demand position and an assessment of the likely future demand for commercial and industrial land.

This report addresses this principal objective and incorporates more specific objectives, including:

- Current land utilisation and ownership patterns;
- Land value and historic sales data;
- The town and region's commercial and industrial structure;
- Trends and opportunities for existing and future industry in Goondiwindi;
- An analysis of the current and likely future supply–demand balance;
- Recommendations for the spatial extent of commercial and industrial areas in and near the town.

1.2 METHODOLOGY

To deliver the *Commercial and Industrial Land Demand Analysis*, the following activities have been undertaken:

- A review of the current Goondiwindi Town, Inglewood and Waggamba Shire Council planning schemes with respect to current commercial and industrial land provision and desired overall outcomes.
- Delimitation and demographic analysis of the Goondiwindi catchment area together with an analysis of its working population, journey to work flows and usual resident population data from the 2006 Census.
- A detailed field inventory and analysis of the existing mix of businesses present in the Goondiwindi region, classified by industry using 2006 ANZSIC codes.
- Quantification and mapping of commercial and industrial zoned vacant and underdeveloped lots.
- Historic absorption rates of commercial and industrial zoned land by lot size and price trends.
- Discussions with selected businesses to gain additional insights about local and regional business linkages and supply chains, comparative advantages and disadvantages of Goondiwindi as a business location, and future directions.
- Meetings and in-depth discussion with government stakeholders to identify potential future employment and business opportunities arising from economic growth generated by agricultural and resource activities in the wider region and population increases to 2031.
- Population and household projections for the Goondiwindi catchment to quantify growth in available household retail expenditure potential to ascertain the scale and function of current and future retail and commercial activities the Goondiwindi Township.
- Discussion of retail trends that will influence the future provision of such activities in the Goondiwindi region and their implications. This future demand is distilled and presented in terms of allocation of potential floorspace and/or land area.
- Population forecasts and employment based forecasts to project future industrial land demand by indicative lot sizes and available supply within the Goondiwindi region and determining potential shortfalls in vacant and underdeveloped land. Other sources of demand are also examined that may influence the amount of industrial land required.

1.3 REPORT STRUCTURE

Section 2 of this report provides a strategic overview of the economic base and planning context of the GRC area. It also provides an overview of the demographic characteristics of the region's catchment and an analysis of its working population. Population and household projections for the catchment are presented in this section.

Section 3 examines the composition of the region's commercial and retail network by industry and commodity group. Vacant and underdeveloped commercial zoned land is also identified.

Section 4 contains a breakdown of the industrial activity and land within Goondiwindi by industry sector and identifies vacant and underdeveloped lots.

Section 5 summarises other factors affecting the demand for industrial and commercial land. It includes a summary of insights provided from the business and stakeholder discussions, as well as a look at retail trends and discussion of other exogenous factors.

Section 6 provides the forecasts for commercial land demand based on two methods - expenditure based forecasting and population based forecasting.

Section 7 contains the forecasts for industrial land demand based on population growth, employment growth and historical take-up rates.

Finally, in Section 8, an evaluation of the land supply-demand position in accommodating new industries and future employment, and identification of sites/areas suitable to accommodate future expansion is provided.

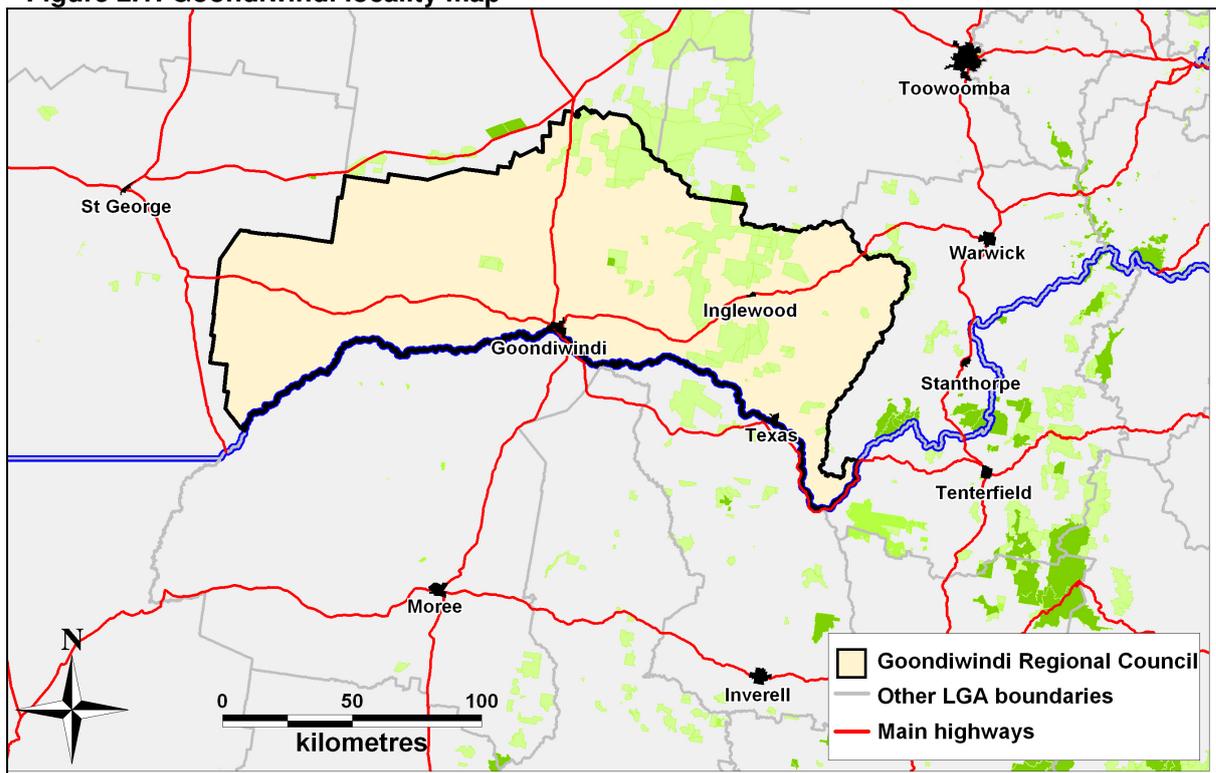
2 Goondiwindi Region Overview

This land demand assessment focuses on the Township of Goondiwindi. However, the town needs to be considered in the context of the Goondiwindi Regional Council and the whole Darling Downs Statistical Division. This section includes an overview of the town in its regional context, a summary of the relevant parts of the existing planning schemes and an analysis of employment trends in the region.

2.1 REGIONAL CONTEXT

Goondiwindi is located on the New South Wales border approximately 350 kilometres south-west of Brisbane and 220 kilometres south-west of Toowoomba (Figure 2.1). It is the major urban centre within Goondiwindi Regional Council and is located on one of the main routes between Queensland and the southern states (via the Newell Highway).

Figure 2.1: Goondiwindi locality map



Goondiwindi Regional Council (GRC) is one of the four Local Government Areas (LGAs) comprising the Darling Downs Statistical Division. GRC has an estimated resident population of 11,188 people as at June 2009, accounting for

4.7% of the Darling Downs population of 237,211 persons¹. The other three LGAs in the Darling Downs SD are Toowoomba, Dalby and Southern Downs Regional Councils.

Toowoomba (population approximately 105,000²) is the major service centre of the Darling Downs, meeting the higher order retail, commercial and industrial needs of residents within GRC and the rest of the Darling Downs. Toowoomba contains a number of shopping centres and the only major department store (a Myer) west of Brisbane, as well as a large number of industrial and commercial businesses. It is a designated Principal Regional Activity Centre under the *South East Queensland Regional Plan 2009-2036*.

Warwick (population approximately 14,000³) is located approximately 200 kilometres east of Goondiwindi. It contains a discount department store (a Big W), a Target Country and a number of major supermarkets including a Woolworths, a Bi-Lo and an Aldi. It also contains some major industrial businesses including a Big W distribution centre. Despite having some higher order retail and services, most people from Goondiwindi would travel to Toowoomba to meet their higher order needs.

Moree Township (population about 8,000) is located approximately 120km to the south of Goondiwindi. It is the seat of government for Moree Plains Shire and is the nearest large urban centre in northern NSW. The town's retail facilities are more extensive than in Goondiwindi and include Coles and Woolworths supermarkets, Target Country, Harvey Norman and a reasonably comprehensive range of specialty shops and services. It lacks a major discount department store and Moree residents must travel to Inverell (Big W) or Tamworth (Kmart) for this and other higher order shopping. Moree is also a major agricultural service centre, with significant grain storage and warehousing and transport (road and rail) facilities in the town.

2.2 GOONDIWINDI REGIONAL COUNCIL

The economy of the Goondiwindi region is largely based on primary production and associated agricultural businesses. The agricultural sector remains a vital part of the economy, but other sectors have grown such as retail, transport, tourism and hospitality.

The urban locality of Goondiwindi, with an estimated resident population of 6,436 persons as at June 2009⁴, is the largest urban centre within the council area. It contains the majority of the region's retail, commercial and industrial services. Other urban centres within the GRC area are Inglewood and Texas,

¹ ABS 'Regional Population Growth, Australia', Catalogue 3218.0, March 2010

² ABS, unpublished population estimates for census collection districts, available at www.oesr.qld.gov.au

³ ABS, unpublished population estimates for census collection districts

⁴ ABS, unpublished population estimates for census collection districts

with estimated residential populations as at June 2009 of 842 and 722 persons respectively⁵. These towns have some retail and commercial services to meet day-to-day requirements of residents. However, for specialised goods and services and to shop at a full-line supermarket, residents must travel to Goondiwindi, Warwick, Stanthorpe or Toowoomba.

2.3 OVERVIEW OF EXISTING PLANNING SCHEMES

There are three existing planning schemes currently being administered by Goondiwindi Regional Council; one for each of the former councils. The Planning Schemes are largely consistent in terms of zonings and the strategic directions for retail, commercial and industrial activity.

The Commercial zone is intended primarily for commercial activities, which according to the Planning Scheme are activities involving the provision of goods, food, services or entertainment. These include catering premises, commercial premises, hotels, professional offices, shops and tourist facilities.

The Industrial zone is intended primarily for industrial activities, which according to the Planning Scheme are activities involving the manufacture, production, servicing, storage and distribution of goods, articles, equipment or vehicles.

The Urban zone is intended primarily for residential uses. Within the Goondiwindi Township there are, however, a number of commercial and industrial businesses located on Urban zoned lots.

2.3.1 Goondiwindi Town Planning Scheme

The former Goondiwindi Town Planning Scheme reinforces the role of Goondiwindi as a regionally significant service centre for social, retail, commercial and industrial services within the Border Rivers and southern Darling Downs Region. It also outlines the need to maintain a single compact commercial centre within the town and the need to protect industrial areas to reinforce their role as key areas for industrial activity.

The Commercial zone in Goondiwindi Town is intended primarily for commercial activities and associated activities, and also allows for community oriented activities necessary to service the town and its surrounding rural area. Community oriented activities include child care centres, educational establishments and places of worship.

There are two commercial zoned precincts within the former Goondiwindi Town – one along Marshall Street and surrounding streets which forms the town centre, and a Highway Commercial Precinct on the Cunningham Highway. In the Highway Commercial Precinct, highway oriented industrial activities are also allowed under the existing planning scheme.

⁵ ABS, unpublished population estimates for census collection districts

Industrial zoned areas are to the north of the town centre. In the former Goondiwindi Town Planning Scheme it appears that there are two industrial areas – one to the south of Boundary Road from the Leichhardt Highway to Troy Drive, the other south of Boundary Road from Racecourse Road east along Cemetery Road. However, these two areas are joined by industrial zoned land which falls within the former Waggamba Shire.

Figure 2.2 shows the Goondiwindi Town zoning map.

2.3.2 Waggamba Shire Council Planning Scheme

The former Waggamba Shire Planning Scheme also recognises the role of Goondiwindi as the principal place for business, administration and commerce in the region. It reinforces the local service role of the small towns of Yelarbon, Toobeah, Bungunya and Talwood. The Planning Scheme outlines the need to consolidate and protect key industrial areas as well as protecting productive rural land, rural industries and natural features.

There is no commercial zoned land within the former Waggamba Shire. There are two separate areas zoned Industrial. One is in the area to the north of the former Goondiwindi Town and joins these industrial areas. The other is to the east of the former Goondiwindi Town and comprises one very large lot on which the Namoi Cotton Gin is located.

Figure 2.3 shows the zoning map for the Goondiwindi Environs which falls within the former Waggamba Shire.

2.3.3 Inglewood Shire Council Planning Scheme

The Planning Scheme reinforces the roles of Inglewood and Texas as the principal places for business, industry and commerce within the former Shire. As with the former Waggamba Shire Planning Scheme it outlines the need to consolidate and protect key industrial areas as well as protecting productive rural land, rural industries and natural features.

The Commercial zone within Inglewood is contained in an area along Albert Street (the Cunningham Highway). There is also one Commercial strip in Texas which stretches along High Street. There are two zoned Industrial areas within Inglewood, one on the southern side of Inglewood and one on the east. There are also two Industrial zoned areas in Texas, one just east of the town centre and one further east near Stanthorpe Texas Road.

Figures 2.4 and 2.5 are the Texas and Inglewood zoning maps. While these areas were inspected, neither forms part of the present study.

Figure 2.2: Goondiwindi Town zoning map

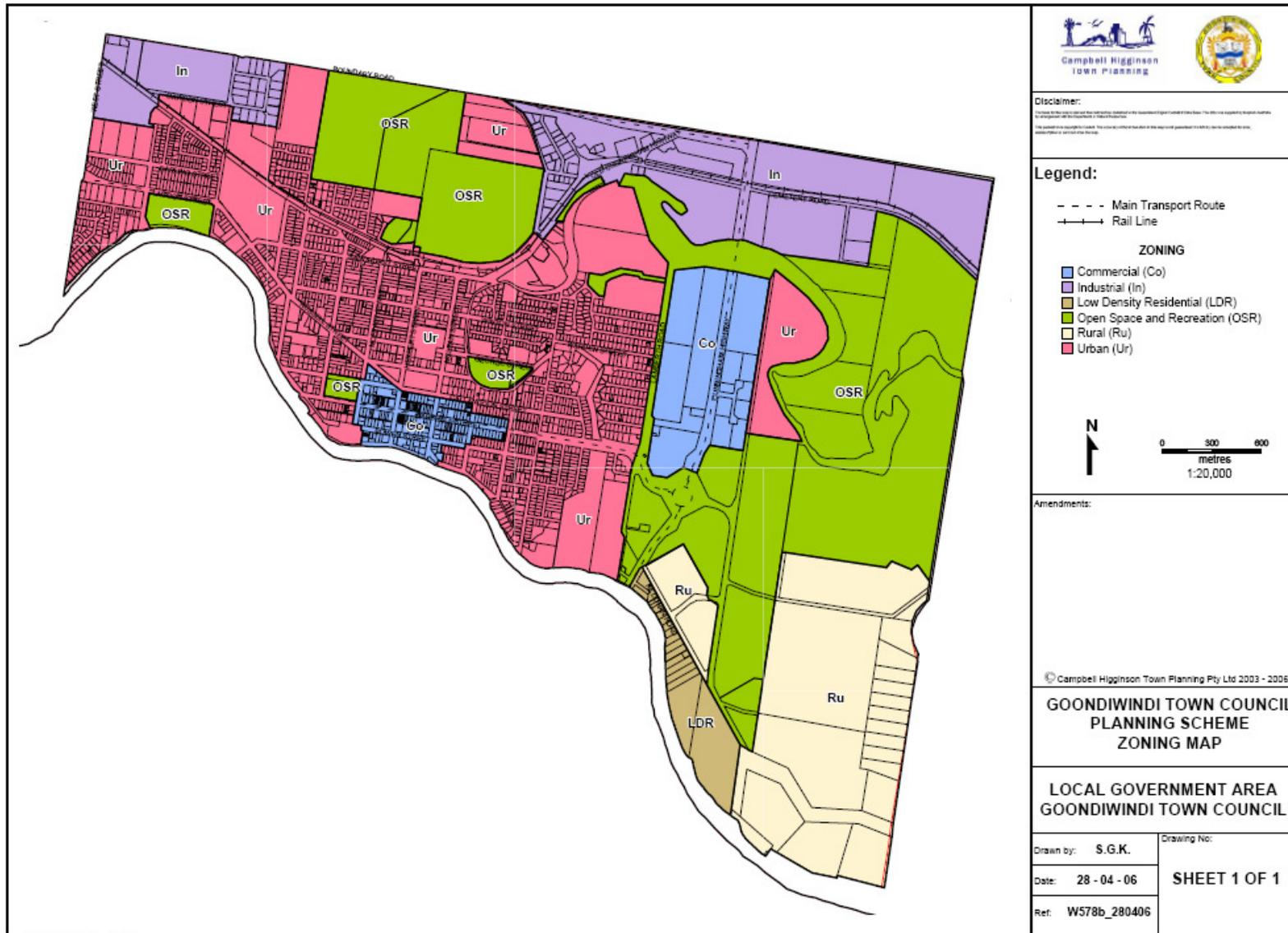


Figure 2.3: Goondiwindi Environs zoning map

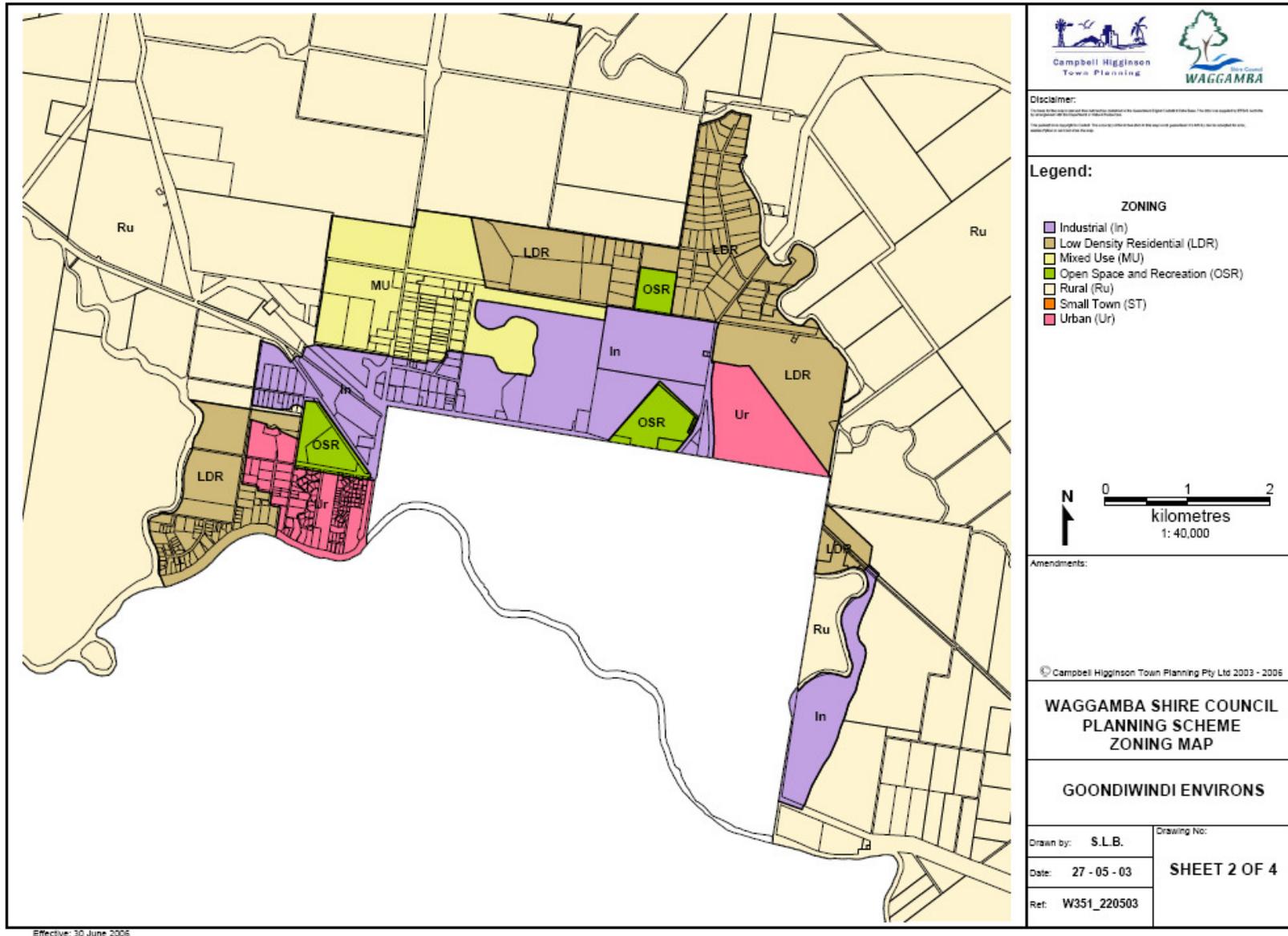
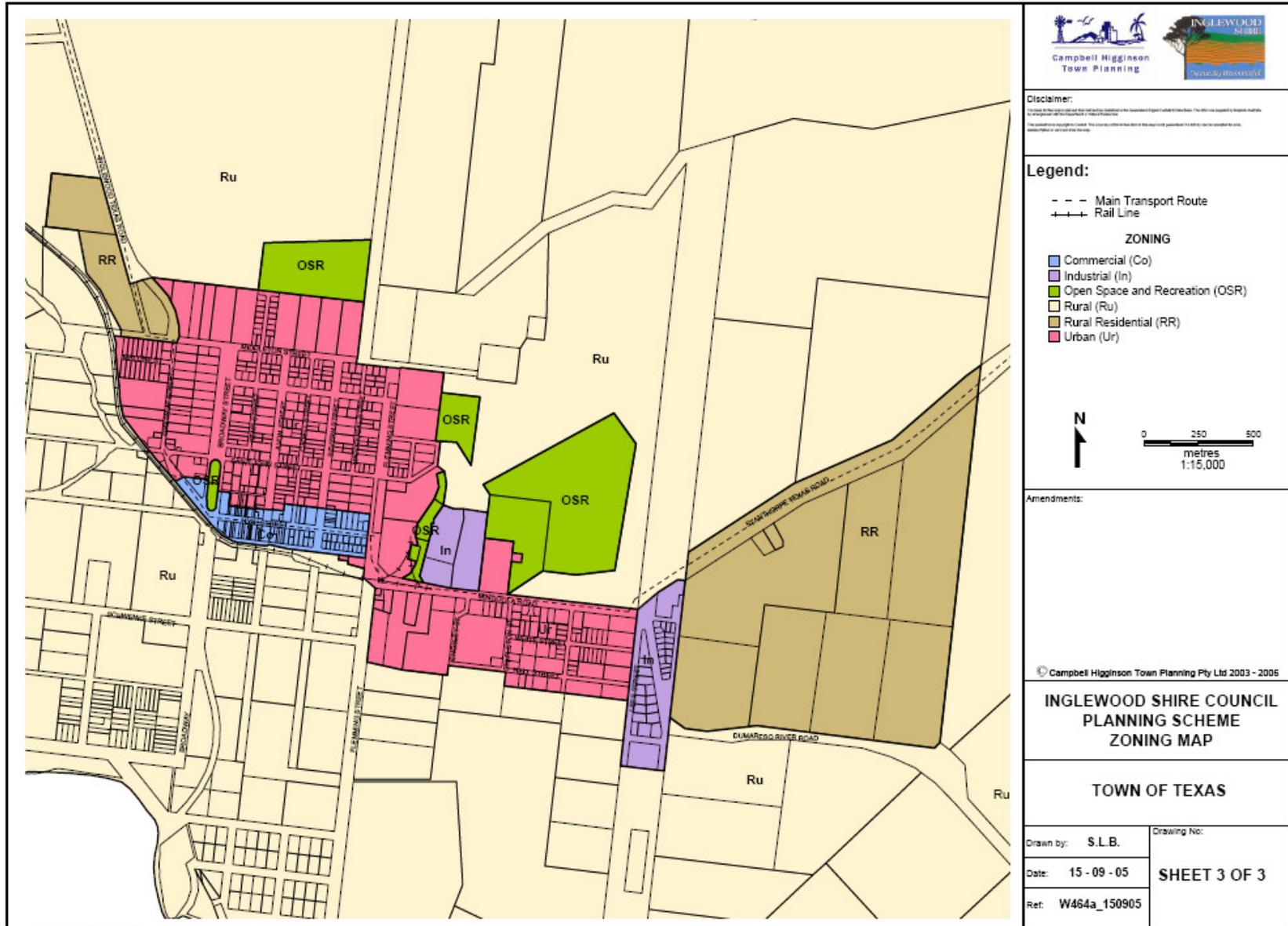
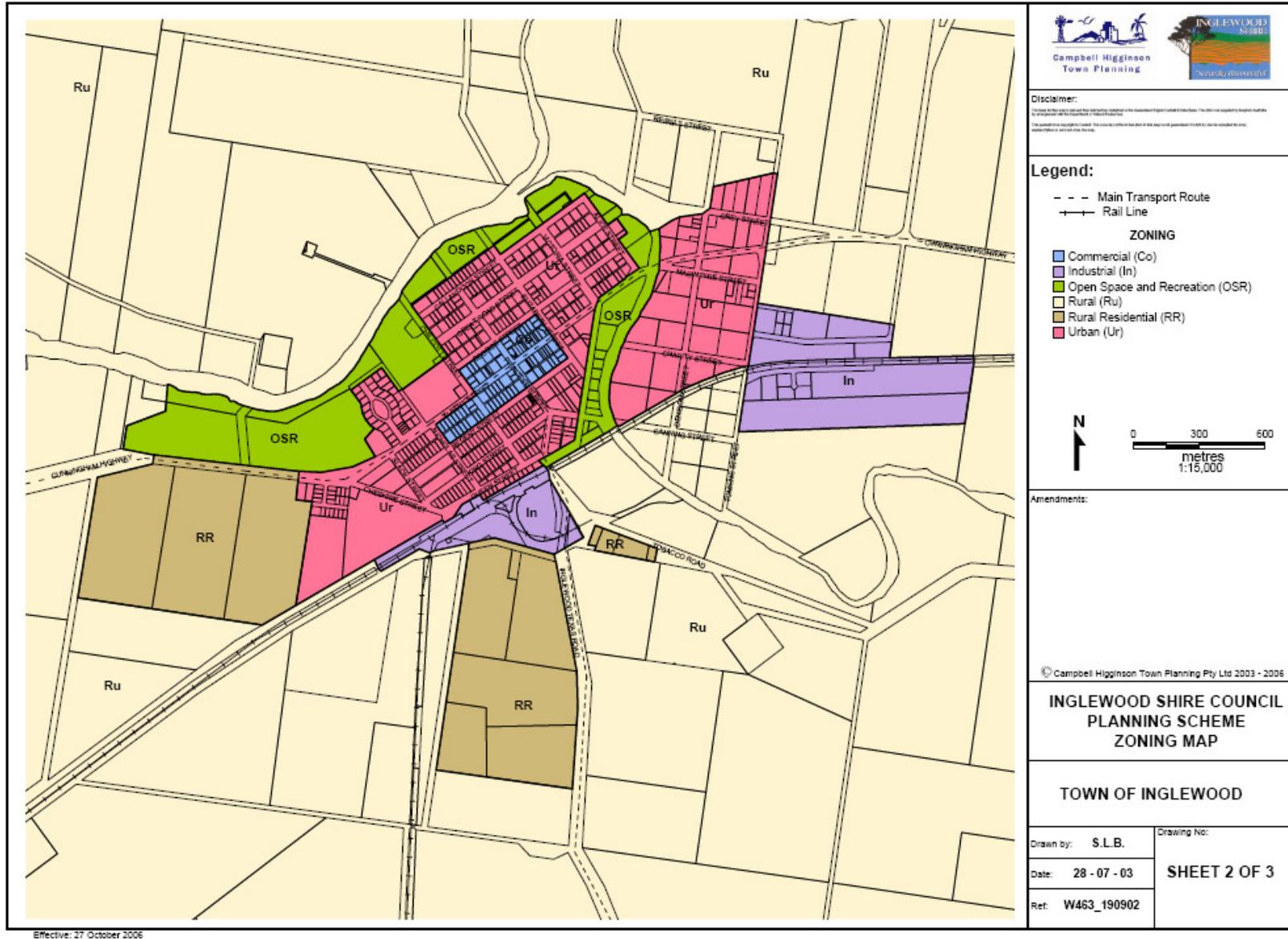


Figure 2.4: Texas zoning map



Effective: 27 October 2006

Figure 2.5: Inglewood zoning map



2.4 HISTORICAL POPULATION GROWTH (BY FORMER LGA BOUNDARIES)

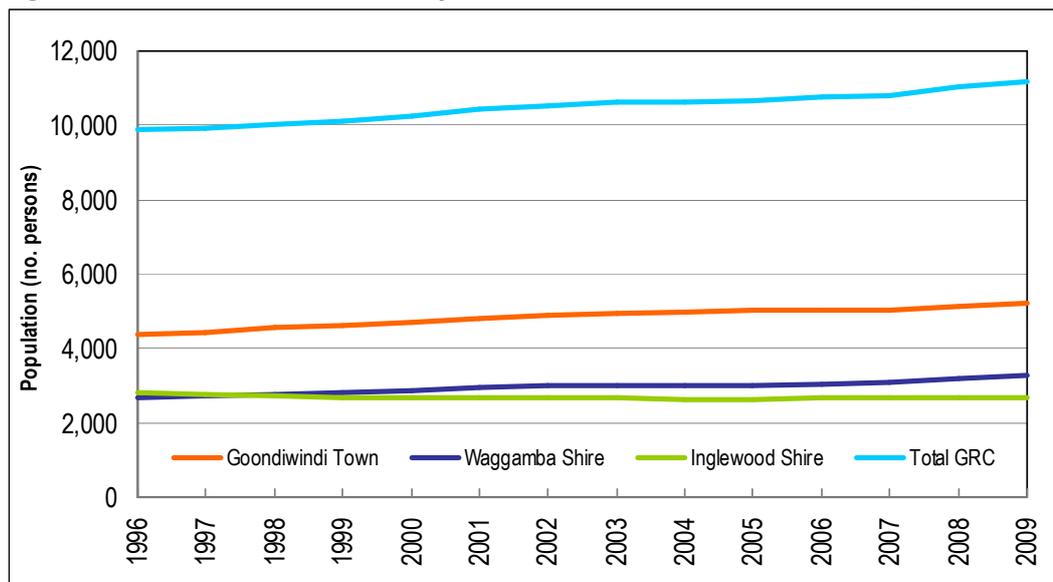
Figure 2.6 shows the estimated resident population for each of the former LGA and total GRC area between June 1996 and 2009.

Over this period, the estimated resident population by LGA:

- increased by 861 people (about 20%) from 4,375 persons to 5,236 persons in Goondiwindi Town;
- increased by 574 people (about 21%) from 2,688 to 3,262 in Waggamba Shire, with most of this growth occurring close to Goondiwindi Town; and
- the population in Inglewood Shire declined slightly from 2,830 persons to 2,690 persons.

Overall, the population of the GRC has grown from 9,893 to 11,188—an increase of about 1,300 people, reflecting an average growth rate of about 1% *per annum* over the 1996–2009 period.

Figure 2.6: Estimated Resident Population for the former LGAs of GRC, 1996-2009



Source: ABS 'Regional Population Growth, Australia', Catalogue 3218.0, March 2010

2.5 FUTURE POPULATION GROWTH – GOONDIWINDI CATCHMENT

2.5.1 Goondiwindi regional catchment defined

Goondiwindi is the largest industrial, commercial and retail centre within the regional council area. In terms of retail, it contains a Target Country store and two major supermarkets (Bi-lo and the Goondiwindi Co-op Foodworks), as well as a number of apparel and homewares shops. Most residents would fulfill their higher order retail and service needs in Toowoomba.

Goondiwindi is the only town within the GRC area with a major chain supermarket (BiLo). Inglewood and Texas contain small supermarkets/convenience stores and other limited retail and commercial services. Residents in and around these towns must travel to Goondiwindi, Stanthorpe, Warwick or Toowoomba for higher order shopping.

The retail, commercial and industrial catchments for Goondiwindi extend beyond the regional council area into northern New South Wales. This catchment, shown in Figure 2.7, is used for the population, expenditure and land demand analysis in this report.

The catchment is separated into three areas:

- Goondiwindi Township;
- the remainder of the Goondiwindi Regional Council area; and
- a northern NSW component.

Goondiwindi Township aligns with the Goondiwindi Urban Centre Locality (UCL) as defined by the ABS. It encompasses the former Goondiwindi Town Council area and two adjacent Census Collector Districts from the former Waggamba Shire, which are essentially part of the town. For the remainder of this report Goondiwindi Township refers to this area, which is larger than the former Goondiwindi Town LGA.

Small portions of the northern parts of Moree Plains, Gwydir and Inverell in NSW fall within the defined catchment.

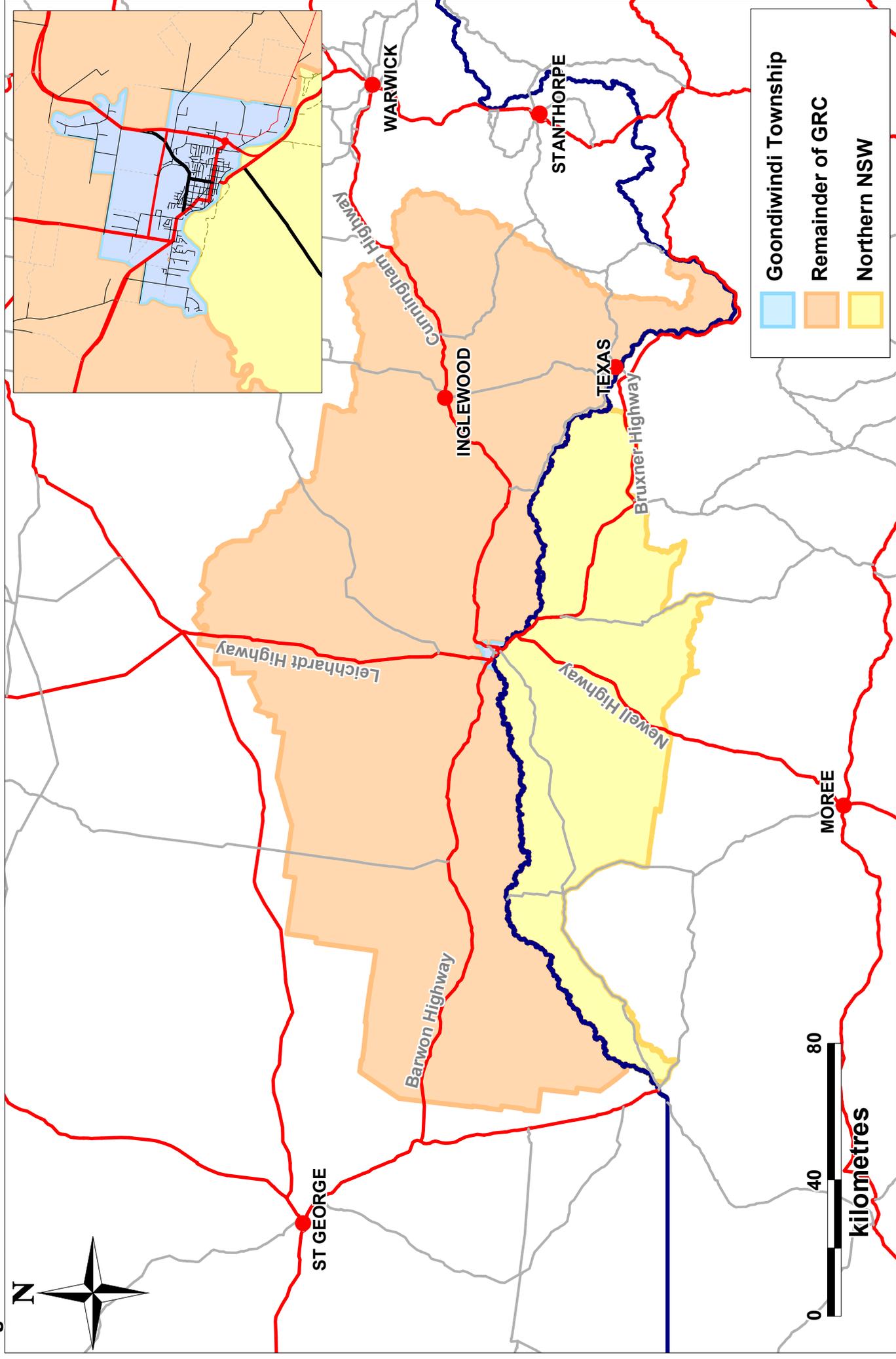
2.5.2 Population and household projections

The Planning Information and Forecasting Unit's (PIFU) population projections (2008 series) were adopted for the Queensland component of the catchment and NSW Planning's projections were used as a guide for the NSW component.

PIFU's medium series population projections are based on the former LGA boundaries. Goondiwindi Township encompasses the former Goondiwindi Town Council area, as well as part of the former Waggamba Shire. PIFU's population projections for Waggamba Shire were apportioned into the population for the part of Waggamba Shire included in Goondiwindi Township and the remaining rural part of the shire. Historical population and dwelling approval data suggests that there has been little growth in the rural part of the former Waggamba shire with slight increases in population in some areas being offset by declines in others. Based on this, the population within the rural part of Waggamba was assumed to remain steady over the projection period, with all growth occurring in the area defined as Goondiwindi Township.

PIFU's high series projections are based on the 2008 boundaries and are for the whole Goondiwindi Regional Council. The majority of the population increase was assumed to occur within the Goondiwindi Township based on historical trends. A low average annual growth rate of 0.2% *per annum* was assumed for the Remainder of GRC.

Figure 2.7: Goondiwindi commercial and industrial catchment



NSW Planning has published population projections for the NSW Local Government Areas forming part of Goondiwindi's catchment. The population in each of these NSW LGAs is projected to decline, as shown in Table 2.1.

Table 2.1: NSW Planning's population projections by LGA

<i>At June</i>	<i>Moree Plains</i>	<i>Gwydir</i>	<i>Inverell</i>
2001	16,200	5,800	15,800
2006	14,700	5,500	16,100
2011	14,200	5,300	16,100
2016	13,600	5,100	16,000
2021	13,000	4,900	15,900
2026	12,400	4,700	15,700
2031	11,700	4,500	15,500
2036	10,900	4,200	15,200

Source: NSW Planning

The population of the NSW area forming part of Goondiwindi's catchment may also decline. However, examination of the usual population by census collector districts comprising this area indicates a small population increase between 2001 and 2006. Consequently, for the purposes of examining future land requirements, the population of the NSW component of catchment is assumed to remain constant over the forecast period to 2031.

The medium and high series population projections for the catchment are shown in Table 2.2 and 2.3, respectively. Between 2011 and 2031 the population of the total catchment is forecast to increase by 1,260 persons to 14,530 by 2031 under the medium series projections. This consists of higher growth in Goondiwindi Township, a relatively steady population in the Remainder of GRC and no growth (or decline) in Northern NSW.

Table 2.2: Medium series population and household projections for catchment

<i>At June</i>	<i>2006</i>	<i>2011</i>	<i>2016</i>	<i>2021</i>	<i>2026</i>	<i>2031</i>
<i>Goondiwindi Township</i>						
Population	6,000	6,350	6,690	7,020	7,300	7,570
Households	2,370	2,520	2,670	2,810	2,930	3,050
Persons per household	2.53	2.52	2.51	2.50	2.49	2.48
<i>Remainder of GRC</i>						
Population	4,740	4,760	4,770	4,790	4,800	4,800
Households	1,870	1,900	1,915	1,940	1,955	1,960
Persons per household	2.53	2.51	2.49	2.47	2.46	2.45
<i>Northern NSW</i>						
Population	2,160	2,160	2,160	2,160	2,160	2,160
Households	705	715	725	735	745	755
Persons per household	3.06	3.02	2.98	2.94	2.90	2.86
<i>Total Catchment</i>						
Population	12,900	13,270	13,620	13,970	14,260	14,530
Households	4,945	5,135	5,310	5,485	5,630	5,765
Persons per household	2.61	2.58	2.56	2.55	2.53	2.52

Source: PIFU; Foresight Partners estimates

Under the high series projections the population of the catchment would increase by 2,570 persons between 2011 and 2031 to reach 16,100 persons (Table 2.3). Over 90% of the population increase is projected to be within Goondiwindi Township (an additional 2,960 persons).

Table 2.3: High series population and household projections for catchment

	2006	2011	2016	2021	2026	2031
<i>Goondiwindi Township</i>						
Population	6,000	6,580	7,150	7,790	8,370	8,960
Households	2,370	2,610	2,850	3,120	3,360	3,620
Persons per household	2.53	2.52	2.51	2.50	2.49	2.48
<i>Remainder of GRC</i>						
Population	4,740	4,790	4,840	4,880	4,930	4,980
Households	1,870	1,910	1,940	1,975	2,005	2,030
Persons per household	2.53	2.51	2.49	2.47	2.46	2.45
<i>Northern NSW</i>						
Population	2,160	2,160	2,160	2,160	2,160	2,160
Households	705	715	725	735	745	755
Persons per household	3.06	3.02	2.98	2.94	2.90	2.86
Total Catchment						
Population	12,900	13,530	14,150	14,830	15,460	16,100
Households	4,945	5,235	5,515	5,830	6,110	6,405
Persons per household	2.61	2.58	2.57	2.54	2.53	2.51

Source: PIFU; Foresight Partners estimates

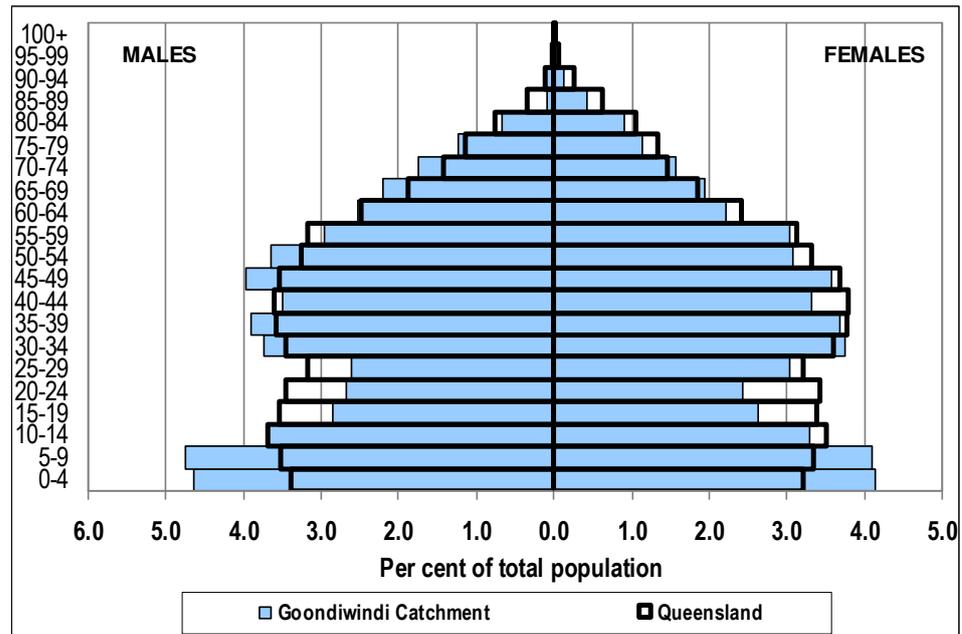
For the purposes of estimating future commercial and industrial land demand and employment later in this report, the medium series projections are used. However, implications of additional demand under the high series population projections are also given.

2.6 SOCIO-ECONOMIC CHARACTERISTICS

A summary of the demographic and socio-economic characteristics of the catchment and the benchmarks of Darling Downs statistical division and Queensland is shown in Table 2.4. Detailed demographic and socio-economic data are presented in Tables A1–A13 in Appendix A. Notable points are outlined below.

- The Goondiwindi catchment has a higher proportion of people aged less than 15 years old compared to both the Darling Downs SD and the Queensland average. This reflects in part the higher proportion of children in Boggabilla, a town with a high indigenous population. Boggabilla accounts for approximately a third of the population in the Northern NSW part of the catchment.
- The catchment has a lower proportion of people in the 15-24 year age group compared to the benchmarks of Darling Downs SD and Queensland. This reflects the low proportion of people aged 15-24 years in the rural part of GRC, which is a result of young people moving out of the rural areas for education and employment.

Figure 2.8: Age-sex structure of the Goondiwindi Catchment population



Source: ABS Census 2006

- Average household income in the catchment (\$59,680) is less than the Queensland average (\$69,240). Average household income does vary, however, within the catchment. The average for the Goondiwindi Township is higher than both the remainder of the GRC and Northern NSW.
- As at 2006, unemployment was lower in the catchment at 3.9% than in the Darling Downs SD (4.5%) and Queensland (4.7%). Unemployment for Goondiwindi Regional Council was 3.2% for the June quarter 2010⁶, which is considerably lower than the unemployment rate of 5.5% for Queensland. The proportion (62%) of the workforce falling in ‘white collar’ occupations is similar to that of Queensland but part of this reflects farm management occupations.
- Within the catchment there is a higher proportion of households consisting of couples with children than in Darling Downs and Queensland, and a lower proportion of single parent households.
- Average household size for the catchment of 2.6 people per household is similar to the Queensland average. However, average household size in the Northern NSW part of the catchment is much higher at 3.1 persons. This reflects the higher proportion of households with children.

Goondiwindi catchment’s socio-economic profile does not differ significantly from that of the larger Darling Downs region or the State for most characteristics. Where it does differ, the key implications are:

⁶ Department of Education, Employment and Workforce Relations (2010), Small Area Labour Markets Australia – June Quarter 2010.

- The proportion of its 15-24 age group leaving for education and employment opportunities, coupled with anticipated modest population increases, and ageing of the population generally, is likely to impact upon the future workforce and workforce participation rates.
- Its lower than State average household incomes, particularly outside the Goondiwindi Township, means that disposable income for retail goods and services is also likely to be below the State average, but similar to that of the Darling Downs. Together with a higher proportion of children, these characteristics suggest a greater propensity to spend on food, budget and mid market apparel rather than upscale fashion, and more on necessities rather than luxuries. However, average household incomes and spending patterns are likely to be volatile over time, influenced by the vagaries of the weather and world agricultural commodity prices, than would be case in major metropolitan areas.
- Households are highly mobile (with over 60% having two or more cars) and can, and do, access shopping, personal and professional services and employment outside Goondiwindi's catchment.

Table 2.4: Summary demographics of the catchment

	<i>Goondi- windi Township</i>	<i>Remainder of GRC</i>	<i>Total GRC</i>	<i>Northern NSW</i>	<i>Total Catchment</i>	<i>Darling Downs SD</i>	<i>QLD</i>
Age							
0-14	23.7	23.2	23.5	30.2	24.6	22.1	20.7
15-24	12.4	7.5	10.2	12.4	10.6	13.5	13.8
25-44	29.4	25.7	27.7	26.4	27.5	25.0	28.2
45-64	22.7	28.1	25.1	24.9	25.0	25.0	25.0
65+	11.8	15.6	13.5	6.1	12.2	14.4	12.4
Employment							
In labour force	72.5	68.2	70.6	63.7	69.5	64.3	66.3
Unemployed	4.2	2.7	3.6	6.2	3.9	4.5	4.7
White collar occupations	59.2	64.3	61.4	66.5	62.2	62.0	64.9
Employed per household	1.4	1.3	1.3	1.2	1.3	1.3	1.3
Household Income							
\$0-\$26,000	19.7	28.0	23.5	27.6	24.1	24.7	20.6
\$26,001-\$52,000	27.5	35.5	31.2	33.8	31.5	30.4	27.2
\$52,000 - \$104,000	40.3	28.5	34.9	27.8	33.8	34.4	35.6
\$104,000 +	12.5	8.0	10.5	10.8	10.5	10.4	16.6
Average (\$2009 values)	\$64,723	\$52,902	\$59,269	\$56,022	\$58,799	\$59,683	\$69,243
Dwellings							
Detached/semi-detached	79.9	96.4	87.6	97.1	89.0	91.4	87.2
Flats/units	17.5	1.4	10.0	0.9	8.6	7.5	11.2
Other structure	2.6	2.2	2.4	2.0	2.4	1.1	1.5
Owned/purchasing	62.0	65.0	63.4	47.6	61.0	69.7	67.2

	<i>Goondi-windi Township</i>	<i>Remainder of GRC</i>	<i>Total GRC</i>	<i>Northern NSW</i>	<i>Total Catchment</i>	<i>Darling Downs SD</i>	<i>QLD</i>
Mobility							
No car	7.0	3.8	5.5	13.9	6.8	7.6	8.2
1 Car	33.5	29.3	31.5	28.8	31.1	36.5	37.8
2 or more cars	59.6	66.9	63.0	57.2	62.1	55.9	54.0
Education (Aged 20+)							
Bachelors Degree	8.3	6.9	7.7	6.5	7.5	8.8	10.9
Grad Dip/Grad Cert	1.2	0.6	0.9	1.0	0.9	1.2	1.3
Postgraduate Degree	0.6	0.7	0.7	0.2	0.6	1.4	2.1
Family Type							
Couples with Children	31.8	33.2	32.5	37.2	33.2	31.4	31.5
Couples without Children	29.1	32.2	30.5	20.1	28.9	29.8	28.5
Single Parent Household	9.5	6.2	7.9	15.0	9.0	10.3	11.6
Lone Person Household	24.1	26.0	25.0	21.3	24.4	24.2	22.8
Group/Other Household	5.5	2.4	4.1	6.3	4.4	4.4	5.7
Average Household Size	2.53	2.53	2.53	3.05	2.61	2.55	2.60
Ethnicity							
Only English spoken at home	98.7	98.2	98.4	99.4	98.6	96.8	91.8

Source: ABS 2006 Census

2.7 EMPLOYMENT

Due to small area data limitations the following analysis of employment refers only to Goondiwindi Regional Council and excludes the Northern NSW part of the catchment.

A snapshot of employment by industry is provided based on people who worked in the GRC area as at 2006 (place of work). How employment by industry has changed since 1996 is also examined, but based on residents of GRC area (place of residence).

2.7.1 Industry of Occupation as at 2006 (place of work)

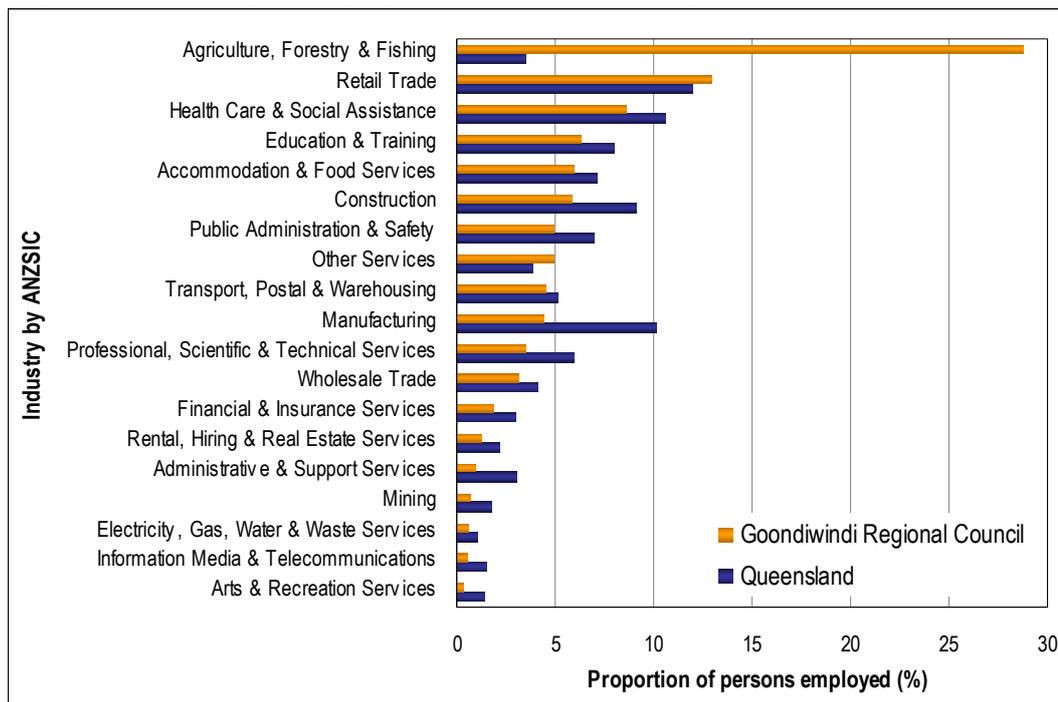
An estimated 4,460 persons worked in the Goondiwindi Regional Council area as at the 2006 Census (Figure 2.9). Approximately 56% of employed persons were employed in the former Goondiwindi Town Council area (2,500 persons), 24% in the former Inglewood Shire (1,600 persons) and 20% in the former Waggamba Shire (890 persons).

Agriculture, Forestry and Fishing is an integral part of the Goondiwindi region's economy, directly employing 1,266 people in 2006 (28.7% of people employed in the region). Over two-thirds of people employed in Agriculture, Forestry and Fishing in the region are in Sheep, Beef Cattle and Grain Farming, with a further 12% in Other Crop Growing and 7% in Support Services. In terms of occupation, over half of people employed in the sector are Managers (58%) and 20% labourers, with the remainder of people in a range of occupations.

Retail Trade is the second largest employment sector within the Goondiwindi region, employing 570 people in 2006. The largest retail types in terms of employment were Supermarket and Grocery Stores (employing 142 people) and Fuel Retailing (employing 100 people).

The largest industrial sectors in terms of employment, excluding agriculture, are Construction and Transport, Postal and Warehousing. The Construction sector employed approximately 250 people in the region in 2006 (5.8% of employed persons). Although the largest industrial sector by employment in the Goondiwindi region, the proportion of people employed in Construction is lower than the 9.0% for all of Queensland.

Figure 2.9: Industry of employment, Goondiwindi Regional Council, 2006



Based on place of work. Source: ABS 2006 Census

Transport, Postal and Warehousing, the second largest industrial sector, employed approximately 200 people in the Goondiwindi region as at 2006, with approximately half of the people employed in the sector working in the road freight industry. Goondiwindi’s location on the main route between Queensland and the southern states makes it an ideal location for road freight businesses.

Goondiwindi’s Manufacturing industries employed about 190 people in 2006 (4.4% of employed persons), which is less than half the proportion for Queensland (10%). The largest Manufacturing employment sectors are Log Sawmilling and Timber Dressing (mainly in the former Inglewood Shire area), followed by Specialised Machinery and Equipment Manufacturing (mainly in Goondiwindi Town).

2.7.2 Employment Trends Since 1996 (place of residence)

To analyse trends in employment over time sectors have been grouped into the following categories:

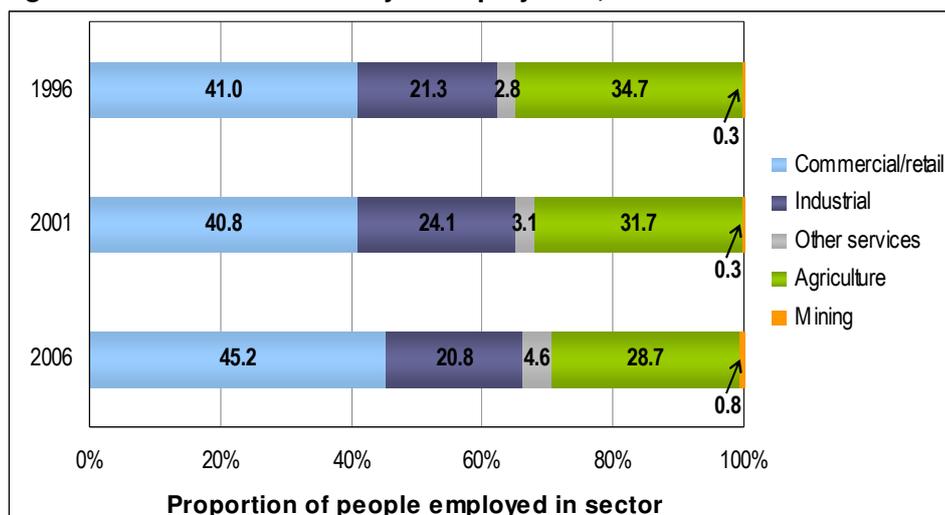
- **Commercial/retail:** Retail Trade, Accommodation and Food Services, Information, Media and Telecommunications, Financial and Insurance Services, Rental, Hiring and Real Estate Services, Professional, Scientific and Technical Services, Administrative and Support Services, Public Administration and Safety, Education and Training, Health Care and Social Assistance and Arts and Recreation Services.
- **Industrial:** Manufacturing, Electricity, Gas, Water and Waste Services, Construction, Wholesale Trade and Transport, Postal and Warehousing.
- **Other Services** remains on its own because it includes some commercial/retail businesses (such as hairdressers and beauty salons) as well as industrial businesses (repairs and maintenance of automotives, machinery and equipment). Do to limitations with time series data, this category could not be further disaggregated.
- **Agriculture, Forestry and Fishing.**
- **Mining.**

Between 1996 and 2006 the proportion of employed GRC residents working in commercial or retail businesses increased from 41% to 45% (Figure 2.10). Sectors in which employment increased over this ten year period include Retail Trade, Professional, Scientific and Technical Services and Health Care and Social Assistance.

Over the period the proportion of people employed in the industrial sector declined, particularly between 2001 and 2006. Most of the decline was attributable to a decline in people employed in Wholesale Trade.

The number and proportion of people employed in Agriculture, Forestry and Fishing declined between 1996 and 2006. This decline is typical of most rural areas. Despite the decline, the sector remains one of the largest in terms of employment, and in terms of importance in underpinning GRC's economic base.

Figure 2.10: Trends in industry of employment, GRC 1996-2006



Based on place of usual residence. Source: ABS 2006 Census

2.7.3 Job and labour force containment

Job containment in GRC is high at about 92% in 2006. This implies that 92 of every 100 jobs within GRC are undertaken by residents of GRC. Job containment is high across all industry sectors with all sectors apart from information media and telecommunications and mining showing job containment of at least 80% (Table 2.5).

Labour force containment for GRC is approximately 84%. This implies that 16 out of every 100 employed residents of GRC work outside the GRC area. Labour force containment varies considerably by industry, with containment in retail trade, professional, scientific and technical services the highest at 95% (Table 2.5). Labour force containment is lowest in the mining (59%) and information median and telecommunications (63%) sectors, however these sectors only relatively small in terms of employment for GRC residents.

Figure 2.11 shows both the number of GRC residents employed in each sector and the number of residents who also work within the GRC area. The difference between the two is the number of people who live in the GRC but work outside the region.

Table 2.5: Job containment and labour force containment in GRC, 2006

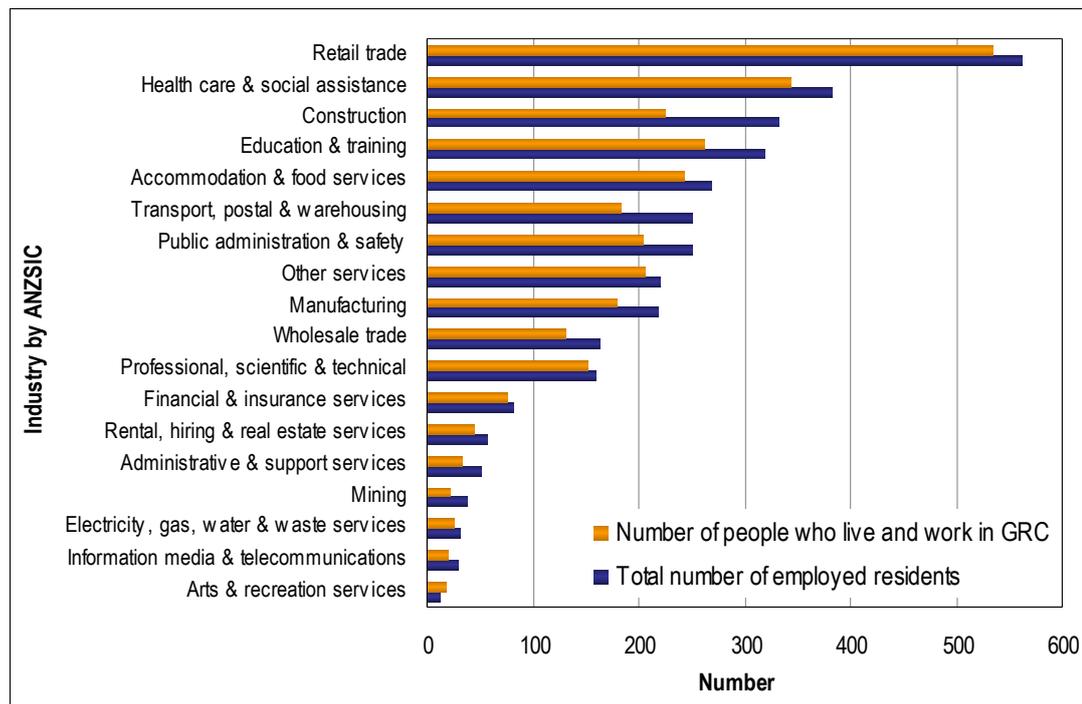
	Total number of jobs in GRC	Number of people who live and work in GRC	Total number of employed residents	Job containment (%)	Labour force containment (%)
Agriculture, forestry & fishing	1,266	1,157	1,376	91.4	84.1
Retail trade	570	534	562	93.7	95.0
Health care & social assistance	378	344	382	91.0	90.1
Construction	279	262	333	93.9	67.6
Education & training	261	243	318	93.1	82.4
Accommodation & food services	256	225	268	87.9	90.7

	Total number of jobs in GRC	Number of people who live and work in GRC	Total number of employed residents	Job containment (%)	Labour force containment (%)
Transport, postal & warehousing	218	203	250	93.1	73.2
Public administration & safety	216	205	250	94.9	81.2
Other services	199	183	219	92.0	93.6
Manufacturing	193	179	218	92.7	82.1
Wholesale trade	155	152	163	98.1	80.4
Prof., scientific & tech. services	141	131	160	92.9	95.0
Financial & insurance services	81	75	81	92.6	92.6
Rental, hiring & real estate services	53	45	57	84.9	78.9
Administrative & support services	39	33	51	84.6	64.7
Mining	33	22	37	66.7	59.5
Elec., gas, water & waste services	28	26	32	92.9	81.3
Info. media & telecommunications	24	19	30	79.2	63.3
Arts & recreation services	15	17	12	113.3	141.7*
Total	4,405	4,055	4,799	92.1	84.5

* Labour force containment cannot be greater than 100%. This anomaly is the likely result of data/rounding error associated with the very small numbers in this sector.

Source: ABS 2006 Census

Figure 2.11: Labour force containment in GRC, 2006



Source: ABS 2006 Census

2.8 SUMMARY AND IMPLICATIONS

- Goondiwindi Township functions as the major rural centre serving the southern Darling Downs and northern NSW region.
- Within the catchment, population growth over the next 20 years to 2031 is expected to be modest, adding between 1,260 to 2,570 new residents based upon PIFU's medium and high series projections.
- The level of population growth suggests that future increases in retail, commercial, industrial and other economic activity, and the future lands needed to cater to population driven demand to 2031, are likely to be incremental rather than substantial in nature.
- Socio-economic characteristics of the catchment population are broadly similar to that of the Darling Downs SD and Queensland, but with lower average household incomes, meaning average household retail spending will be similarly lower.
- The region's employment profile reflects the strong agricultural nature of its economy, with much of its industrial and commercial activity also linked, directly or indirectly, to primary production.
- High job and labour force containment rates is partly a function of the GRC's (mainly Goondiwindi Township's) commuting distance to alternative major employment centres, but is mainly indicative of the GRC's employment self-sufficiency across almost all industry sectors.

3 Retail and Commercial Composition

This chapter examines the current retail and commercial provision in Goondiwindi Township as at August 2010. An analysis of commercial land supply is also presented.

3.1 RETAIL AND COMMERCIAL COMPOSITION

In August 2010 Foresight Partners undertook a detailed field inventory of retail and commercial activity within the Goondiwindi Township. For each business, the name of the business, a description of their main activity and an estimated Gross Floor Area (GFA) were noted. While in the field, digital cadastral information, aerial photography and planning scheme zoning maps were used to match businesses to lots. Each business was then classified using ANZSIC 2006 codes to level 3 classifications (see Appendix B for a list of the codes and titles) and commodity group classifications using the information gathered in the field.

The majority of the retail and commercial activity within Goondiwindi is concentrated on Marshall Street and adjacent streets, within the Commercial zone. As at August 2010 a total of 154 retail and commercial tenancies were identified in Goondiwindi, and an additional 18 vacant tenancies.

There are a small number of other businesses that are not included as part of this retail and commercial floorspace analysis, but are included in estimates of occupied commercial land. These include petrol stations, car dealerships, motels, hotels and pubs/taverns as they are generally not considered 'traditional' retail activities, as gross floor area measures are generally not comparable with other retail and commercial activities. Nevertheless, such uses within zoned commercial area have an estimated GFA of approximately 13,000m² (of which 10,000m² is in the town centre and 3,000m² in the highway commercial precinct).

In addition, some motels provide a small restaurant/café and these have also been excluded from the analysis as they are relatively small-scale uses ancillary to their main function.

3.1.1 ANZSIC Classification

The 154 retail/commercial tenancies yielded an estimated total floorspace of 39,074m². Over half of this floorspace (21,700m²) is dedicated to Retail Trade, and is occupied by 62 retail businesses (Table 3.1). More detailed results are provided in Appendix C.

Table 3.1: Goondiwindi retail and commercial inventory by first level ANZSIC, August 2010

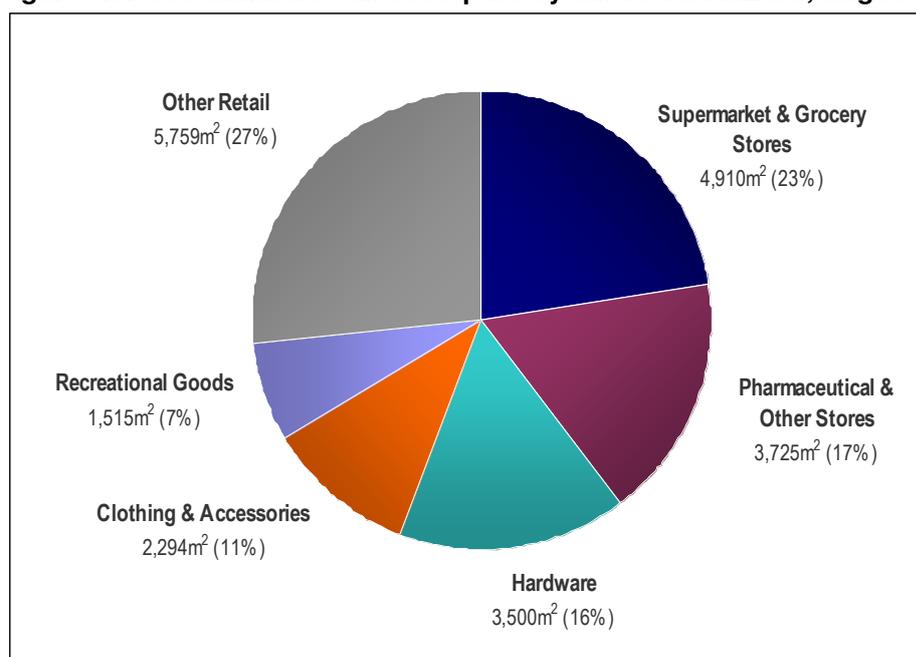
	<i>Businesses</i>		<i>GFA</i>		<i>Average Area (m²)</i>
	<i>No.</i>	<i>%</i>	<i>GFA (m²)</i>	<i>%</i>	
A Agriculture, Forestry and Fishing	1	0.6	350	0.9	350
E Construction	1	0.6	103	0.3	103
F Wholesale Trade	2	1.3	140	0.4	70

	Businesses		GFA		Average Area (m ²)
	No.	%	GFA (m ²)	%	
G Retail Trade	62	40.3	21,703	55.5	350
H Accommodation and Food Services	12	7.8	1,350	3.5	113
I Transport, Postal and Warehousing	1	0.6	180	0.5	180
J Information Media and Telecommunications	3	1.9	1,420	3.6	473
K Financial and Insurance Services	10	6.5	2,065	5.3	207
L Rental, Hiring and Real Estate Services	7	4.5	1,140	2.9	163
M Professional, Scientific & Technical Services	9	5.8	1,522	3.9	169
N Administrative and Support Services	10	6.5	2,545	6.5	255
O Public Administration and Safety	6	3.9	1,805	4.6	301
P Education and Training	2	1.3	820	2.1	410
Q Health Care and Social Assistance	15	9.7	2,815	7.2	188
R Arts and Recreation Services	1	0.6	150	0.4	150
S Other Services	12	7.8	966	2.5	81
TOTAL	154	100.0	39,074	100.0	254
Vacant tenancies	18	10.5	2,660	6.4	148

Source: Foresight Partners estimates, August 2010

The retail category occupying the largest amount of floorspace is Supermarket and Grocery Stores, which accounts for 23% of occupied retail floorspace in Goondiwindi (Figure 3.1 and Table 3.2). There are only four businesses in this category – a 2,600m² BiLo supermarket and the 2,000m² Goondiwindi Foodworks Co-op and two small convenience stores. Pharmaceutical and Other Store-Based Retailing is the second largest retail category in terms of floorspace and the largest in terms of the number of businesses. There are 17 businesses within this category occupying 3,725m². This category encompasses a range of retailers including pharmacies, florists, second-hand shops, pet shops and discount variety stores.

Figure 3.1: Goondiwindi retail floorspace by third level ANZSIC, August 2010



Source: Foresight Partners estimates, August 2010

Table 3.2: Goondiwindi retail inventory by third level ANZSIC, August 2010

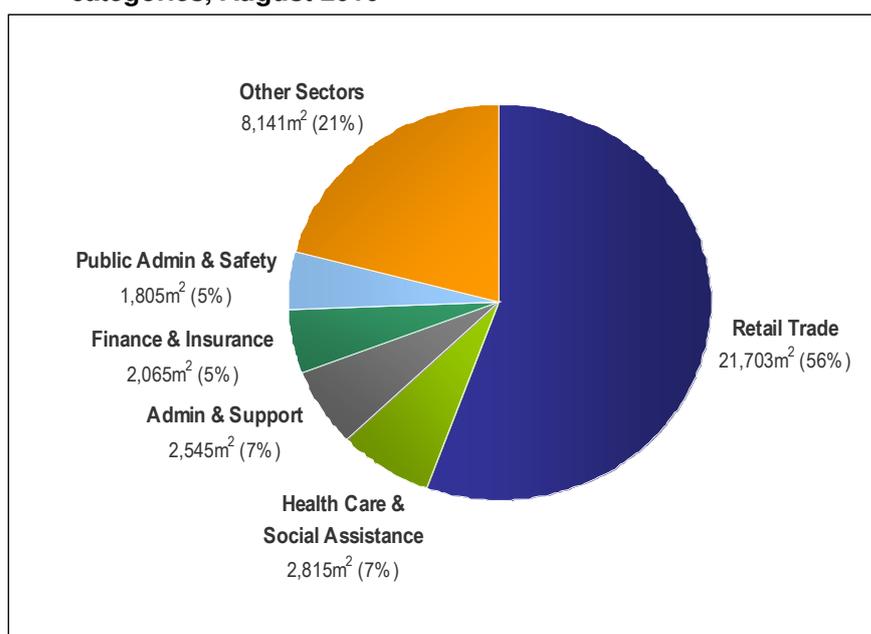
ANZSIC		Businesses		GFA		Average Area (m ²)
		No.	%	GFA (m ²)	%	
392	Motor Vehicle Parts and Tyre Retailing	3	4.8	890	4.1	297
411	Supermarket and Grocery Stores	4	6.5	4,910	22.6	1,228
412	Specialised Food Retailing	8	12.9	1,444	6.7	181
421	Furniture, Floor Coverings, Houseware & Textile Goods Retailing	4	6.5	1,490	6.9	373
422	Electrical and Electronic Goods Retailing	4	6.5	770	3.5	193
423	Hardware, Building and Garden Supplies Retailing	4	6.5	3,500	16.1	875
424	Recreational Goods Retailing	5	8.1	1,515	7.0	303
425	Clothing, Footwear & Personal Accessory Retailing	12	19.4	2,294	10.6	191
426	Department Stores	1	1.6	1,165	5.4	1,165
427	Pharmaceutical and Other Store-Based Retailing	17	27.4	3,725	17.2	219
Total		62	100.0	21,703	100.0	350

Source: Foresight Partners estimates, August 2010

Apart from Retail Trade, all other commercial sectors each occupy less than 3,000m² (Figure 3.2). Health Care and Social Assistance is the second largest category in terms of GFA within Goondiwindi, with a total floorspace of 2,800m². This includes medical centres, physiotherapists, optometrist, dental surgery and Centrelink, but excludes the hospital.

Administrative and Support Services in the third largest category in terms of retail and commercial floorspace in Goondiwindi, occupying 2,545m². This encompasses employment services, pest control businesses and administrative offices for large companies (such as Sun Water and Namoi Cotton).

Figure 3.2: Goondiwindi Township retail and commercial GFA by top 5 ANZSIC categories, August 2010



Source: Foresight Partners estimates, August 2010

3.1.2 Commodity Group Classification

The retail and commercial activities were also classified using six basic commodity groups as these relate more closely to household retail spending and are used for forecasting future demand (Table 3.3).

Six specific classifications were used to define the proportional distribution of retail and commercial floorspace among different uses:

- Take Home Food – includes supermarkets and specialty food stores such as greengrocers, butchers, bakeries, tobacconists, delis and bottle shops;
- Meals Out/Take Away – includes restaurants, take away and cafes. Two notable exceptions are public bars/bistros and restaurants inside hotels (bottle shops attached to public bars have been included in Take Home Food);
- Apparel – includes clothing, footwear and accessories;
- Homewares/Personal Services – includes chemists, newsagents, hardware, homewares, department and variety stores, other non-food goods and personal services (e.g. hairdresser, barber, DVD hire, dry-cleaning);
- Professional Services/Commercial/Government – includes businesses and activities such as banks, real estate agencies, travel agencies, medical services, solicitors, commercial and government offices and Australia Post.
- Entertainment – includes the cinema.
- Vacant – includes all vacant premises potentially useable for retail and commercial purposes in the future.

Table 3.3: Goondiwindi Township retail and commercial inventory by commodity group

	<i>Businesses</i>		<i>Estimated GFA</i>	
	<i>No.</i>	<i>%</i>	<i>m²</i>	<i>%</i>
Take Home Food	13	7.6	6,519	15.6
Meals Out/Take Away	12	7.0	1,350	3.2
Apparel	10	5.8	1,869	4.5
Homewares/Personal Services	54	31.4	14,840	35.6
Total Retail*	89	51.7	24,578	58.9
Professional Services/Commercial/Gov't	64	37.2	13,596	32.6
Entertainment (cinema)	1	0.6	900	2.2
Vacant retail and commercial premises	18	10.5	2,660	6.4
TOTAL	172	100.0	41,734	100.0

* Retail is defined differently under this classification compared to the ANZSIC codes and includes personal services

Source: Foresight Partners estimates, August 2010

As at August 2010 a total of 172 retail and commercial tenancies were identified in Goondiwindi. This figure includes 64 professional services, commercial and government tenancies and 18 vacant premises. The 172 retail and commercial premises yielded an estimated total floorspace of 41,734m², with almost 25,000m² dedicated to retail. Almost all of the Township's retail floorspace (approximately 80 shops occupying 22,800m²) is located in the town centre area.

3.1.3 Goondiwindi's centre function

Goondiwindi functions within a network or hierarchy of centres serving the southern Darling Downs and northern NSW region, with Toowoomba serving as the primary retail and commercial destination. Although Warwick offers a greater range of retail goods and services and is marginally closer, most GRC households would rely upon Toowoomba for their higher order shopping and professional service needs. Moree also functions as a larger retail and commercial centre but would not attract regular retail custom from the GRC area, and only those NSW residents north of about the town of North Star are likely to use Goondiwindi in preference to Moree.

Goondiwindi's retail and commercial facilities are largely concentrated in a compact, three block section of Marshall Street, and the town centre appears vibrant and healthy. The town's retail composition indicates that it is strongly convenience-orientated but also offers a sufficient range of apparel and homewares to satisfy most, but not all, household shopping needs. Its BiLo and Foodworks supermarkets appear to meet most supermarket shopping needs, despite being at the smaller end of the spectrum for full-line supermarkets (which generally range from about 2,500m² to 3,500m² or more).

Approximately 2,660m² or 6.4% of the town's 41,734m² of inventoried retail and commercial floorspace was vacant (18 premises). Only about 1,600m² of this is located along Marshall Street and a quarter of this figure is contained in a single premises.

A dynamic and 'healthy' retail and commercial centre needs some level of vacant space to allow for new market entrants, and to allow existing retailers and other commercial businesses to expand (or contract) in response to changing market conditions. The presence of some vacant space also helps moderate rents within the local market. There is no set benchmark for a 'desirable' vacancy level, but a range of 3% to 8% of total floorspace is commonly cited as indicative of a healthy retail and commercial market.

3.2 COMMERCIAL LAND SUPPLY

There is a total of 75ha of Commercial zoned land within Goondiwindi; 17.9ha in the town centre and 57.5ha in the highway commercial precinct (Figure 3.3 and Table 3.4). The highway precinct is very different to the commercial area in the town centre – the lots are much larger and the nature of the businesses very different. To the west of the highway there is a motel, a McDonalds and a truck stop. On the other side of the highway there are mainly industrial businesses. Some industrial businesses are permitted in this commercial area under the existing

Planning Scheme. Council indicates that the Department of Transport and Main Roads is unlikely to allow further access to the Cunningham Highway, which would greatly constrain, if not prohibit, further development of this area for commercial or industrial uses.

There are an additional 20ha of land in Goondiwindi that is not zoned commercial but that has commercial activities on it. This land is zoned either urban or industrial.

Table 3.4: Goondiwindi commercial zoned land

	<i>Town Centre (ha)</i>	<i>Highway Precinct (ha)</i>	<i>Total (ha)</i>
Commercial zoned land with businesses on it:			
- Commercial businesses	9.6	14.5	24.1
- Non-commercial businesses	0.5	5.8	6.2
Underdeveloped land	6.9	-	6.9
Vacant land	0.9	37.2	38.1
Total Commercial zoned land	17.9	57.5	75.4
Urban and industrial zoned land supporting commercial activities			20.4*

*Includes motels, car dealerships, the bowls club and all other commercial and retail activities. Includes only part of Waggamba Square which has a mix of commercial and industrial tenancies.

Source: Foresight Partners estimates, August 2010

Of the 20.4ha of non-commercial land, 12.3 ha is zoned industrial and is occupied by three commercial businesses – a truckstop and two tourist parks. The remaining 8.1ha are zoned urban and comprise 37 commercial premises. Commercial activities located on urban zoned land include motels, the RSL club, the bowls club, car dealerships and convenience stores.

3.2.1 Vacant Land

There is less than 1ha of vacant commercial zoned land located in the town centre of Goondiwindi (Table 3.5). The town centre is where most retail and commercial businesses are located.

There are 37.2ha of vacant Commercial zoned land in the precinct along the Cunningham Highway. While this is zoned commercial, the nature of the businesses in this area is different and it is not likely to have traditional retail and commercial premises located in this precinct. This is due to the pattern of development to date and its distance from the town centre. In the area to the Eastern side of the highway the businesses are mainly of an industrial nature, while on the Western side they are large users that benefit from a highway location (a motel, a truckstop and a McDonalds).

Table 3.5: Vacant and underdeveloped commercial land

<i>Size of lot</i>	<i>Vacant</i>		<i>Underdeveloped</i>		<i>Total</i>	
	<i>No. Lots</i>	<i>Ha</i>	<i>No. Lots</i>	<i>Ha</i>	<i>No .lots</i>	<i>Ha</i>
2,000m ² and less	7	0.9	62	6.1	69	7.0
Between 2000m ² and 2ha	3	5.0	3	0.8	6	5.8
Over 2ha	4	32.2	-	-	4	32.2
TOTAL	14	38.1	65	6.9	79	45.0

Source: Foresight Partners estimates, August 2010

There are 14 vacant commercial zoned lots in total – seven lots in the town centre each less than 2,000m², and seven lots in the highway precinct each greater than 2,000m².

Figure 3.3 shows the geographic distribution of commercial activities by zone, non-commercial activity on commercially zoned land, and vacant land. It also shows the distribution of observed vacant retail and commercial tenancies.

3.2.2 Underdeveloped Land

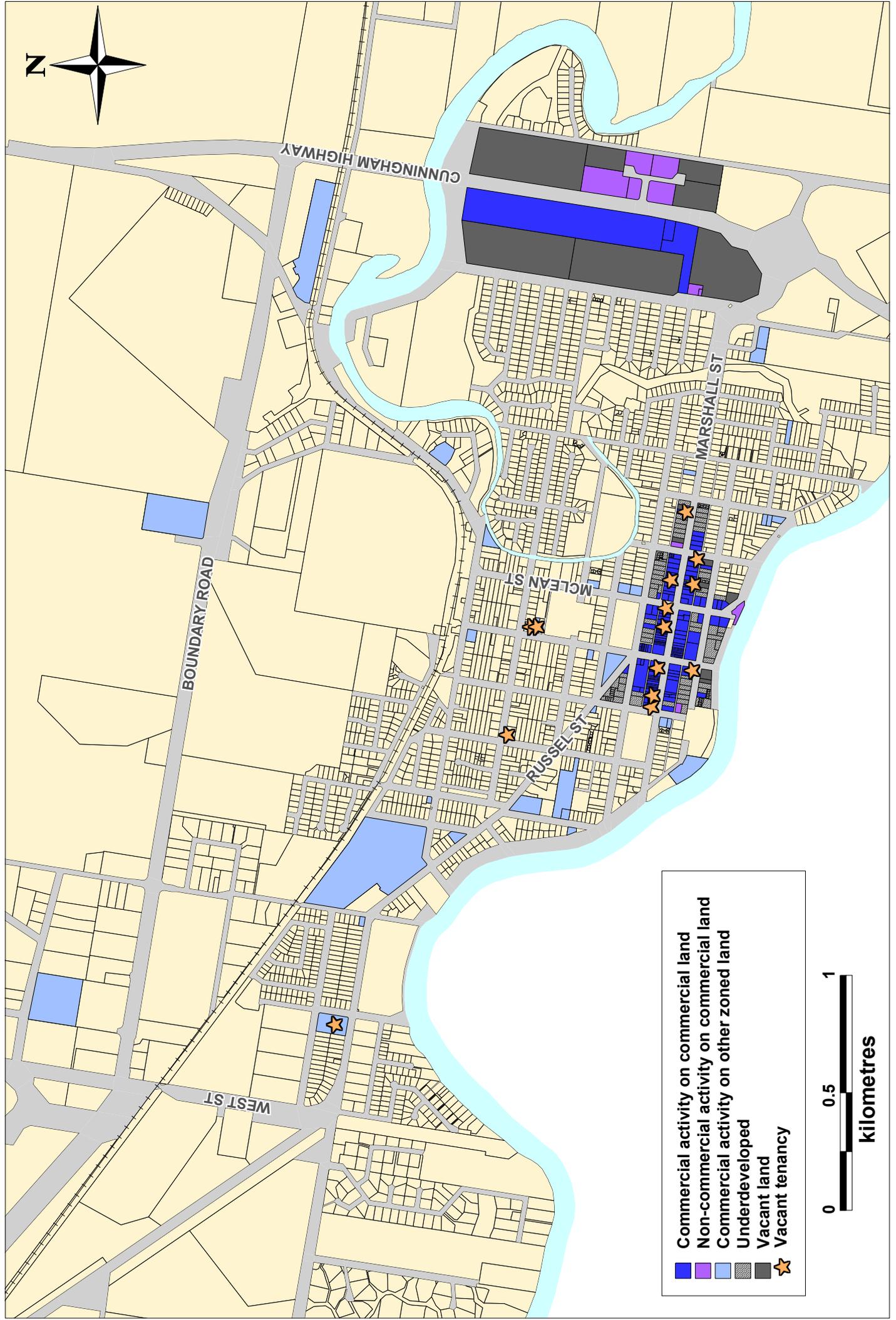
Underdeveloped land includes commercial zoned lots with residential dwellings or old sheds on them. While there is little vacant land within the commercial precinct in the town centre, there are 65 lots classified as underdeveloped with a total area of nearly 7ha (Table 3.5). It should be noted that while many of the houses are older, there are some newer units which are unlikely to be redeveloped for commercial premises in the foreseeable future. Consequently, the amount of land that realistically could be redeveloped for commercial uses in the future is likely to be closer to 6ha.

There are no underdeveloped lots in the Highway Commercial Precinct, with perhaps the exception of the BP truckstop.

3.3 TAKE UP OF COMMERCIAL LAND

Development applications and sales of commercial land are both used to give an indication of the level of development activity within the retail and commercial sectors in Goondiwindi. Approved and pending development applications are examined as these could be developed in the near future and meet some of the future demand for retail/commercial floorspace. Analysis of sales of commercial zoned land can identify trends, if any, in the number of sales, size of lots being sold and prices achieved.

Figure 3.3: Commercial activity in Goondiwindi



3.3.1 Commercial and Retail Development Applications

Within Goondiwindi Township there are only a small number of approved and pending development applications for commercial developments that have not yet been built (Table 3.6). There are five applications, all for offices/commercial premises on Urban zoned land. The two largest developments are on adjoining lots on Lagoon Street for offices and storage. The DA for only one of these lots has been approved to date.

Table 3.6: Retail and commercial development applications, Goondiwindi*

<i>Street</i>	<i>Zoning</i>	<i>Development Type</i>	<i>Lot size (m²)</i>	<i>Status of application</i>
Francis St	Urban	MCU – Fuel depot, offices and retail outlets	974	Information request stage
Mill St	Urban	MCU – Commercial premises	1,000	Approved
Mill St	Urban	MCU – Commercial premises	1,000	Approved
Lagoon St	Urban	Offices and storage	6,039	Decision making period extended
Lagoon St	Urban	Offices and storage	5,157	Approved

* Excludes applications which Council has advised are not proceeding

Source: Goondiwindi Regional Council

3.3.2 Commercial Land Sales Activity

Sales of commercial zoned land within the town centre provide an indication of the level of market activity (Table 3.7). However, because the sales data includes multiple sales of single lots, and retail and commercial businesses often lease premises, sales of commercial land are not necessarily a good indication of demand over time.

Usually sales of all commercial zoned land would be analysed. However, there are a large number of residential dwellings on commercial zoned land in Goondiwindi and sale of these dwellings skew the results. To avoid this only sales of commercial land that currently contain commercial businesses or buildings were included in the analysis.

Analysis of the sales data shows:

- Over the 2000 to 2010 period there were 83 sales of commercial land in Goondiwindi township, totaling an area of 8.7 ha. The average size of the commercial lots sold was just over 1,000m².
- The number of sales (and total area sold) varies considerably from year to year and does not reveal any particular trend. There were, however, a low number of sales in 2008 and 2009. This could have reflected the global financial crisis or poor seasonal conditions in the Goondiwindi region affecting agricultural businesses and economic activity.

- The median price per square metre also varies from year to year but has shown a general upward trend over the past 10 years. Prices achieved would be influenced by the age and quality of the building occupying the lot.

Table 3.7: Commercial zoned land sales[#], Goondiwindi town centre

<i>Year</i>	<i>No. Sales</i>	<i>Land area sold (ha)</i>	<i>Median price per m²</i>
2000	8	0.8	\$223
2001	13	2.6	\$193
2002	7	1.0	\$201
2003	9	0.6	\$414
2004	13	1.1	\$263
2005	5	0.5	\$260
2006	9	0.8	\$751
2007	8	0.5	\$969
2008	4	0.3	\$739
2009	2	0.2	\$374
2010*	5	0.3	\$663
Total 2000-2010	83	8.7	\$316
Total 2000-2004	50	6.1	\$271
Total 2005-2010	33	2.5	\$663
Average 2000-2010	8	0.8	
Average 2000-2004	10	1.2	
Average 2005-2010	6	0.4	

[#] Only includes sales of land that has a commercial building/business located on it.

* Part year sales to about August.

Source: Price Finder and Foresight Partners calculations

Examination of vacant commercial zoned sites within the town centre for sales activity indicates only three lots were sold over the past ten years and none since 2006. However, aerial photography suggests that there were dwellings on two of these lots at the time of their sale. This suggests that they may have been purchased with the intent to redevelop, but there is no clear evidence of site amalgamation which may reflect the residential use of the land rather than sales to developers.

In addition to the sales analysed above there have been sales of land in the highway commercial precinct. Sales of the lots around Wilson Court are included in the industrial section as they are being used primarily by industrial businesses.

3.4 SUMMARY

- Retailing dominates the Township's commercial profile in terms of number of businesses and floorspace, which is strongly convenience-orientated, but also offers a sufficient range of apparel and homewares to satisfy most, but not all, household shopping needs.
- Non-retail activities and floorspace are dominated by population-serving activities such as Health Care and Social Assistance, Administrative and Support Services and Financial and Insurance Services.

- The town centre's retail and commercial area occupies almost 18ha but is relatively compact and appears vibrant and healthy, with most retail and commercial activities concentrated in a three block area along Marshall Street.
- The Township functions as a major service centre in the southern Darling Downs region. Toowoomba, as the largest retail and commercial centre serving the whole of the Darling Downs, would provide for most Goondiwindi catchment residents' higher order shopping needs.
- Very little vacant land (less than a hectare) is located in the town centre. However, there appears to be about 6ha of underdeveloped land potentially available for future expansion of retail and commercial activities within the Central Commercial or town centre area
- Most of the Township's remaining vacant commercial land is located in the Highway Commercial Precinct, over which there is considerable doubt as to whether this land can actually be used for commercial (or light industrial) purposes in the future, because of access constraints.

4 Industrial Land Use Profile

This chapter examines the current industrial activity and land provision in Goondiwindi, which was also part of the August 2010 inventory of land use activities.

4.1 INDUSTRIAL COMPOSITION

The location of industrial businesses in and near the Goondiwindi Township is somewhat fragmented. There are businesses located in a few separate Industrial zoned areas, as well as within the Urban and Commercial zoned areas.

A total of 128 industrial businesses/activities were identified in and near the Goondiwindi Township, occupying approximately 247.2ha, including industrial activities occurring outside industrial zoned land. Table 4.1 and Figures 4.1-4.2 provide a summary of the industrial activities in Goondiwindi, with more detailed results provided in Appendix D.

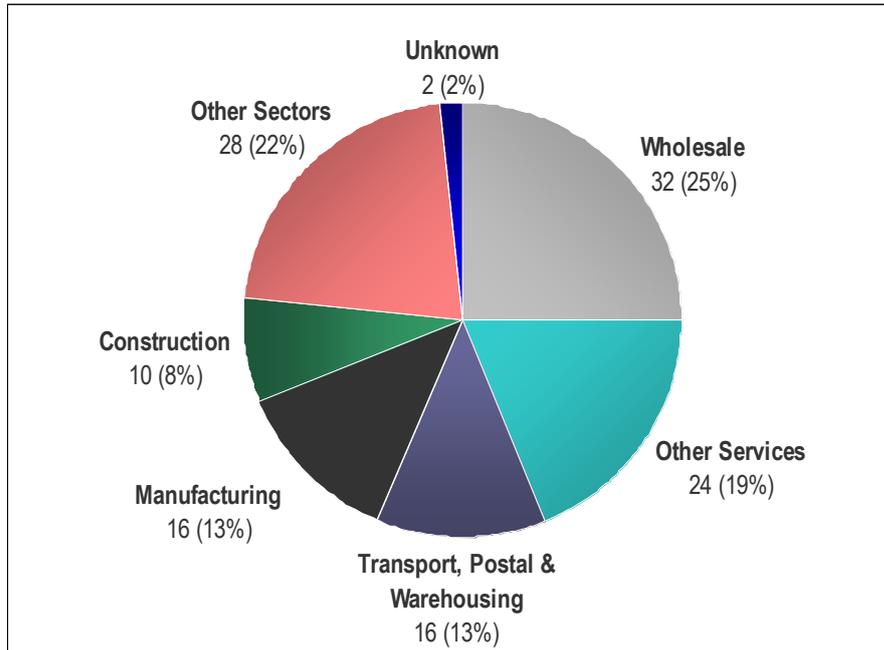
Table 4.1: Goondiwindi Township industrial inventory by first level ANZSIC, August 2010

	<i>Businesses</i>		<i>Area</i>		<i>Average Area (ha)</i>
	<i>No.</i>	<i>%</i>	<i>Area (ha)</i>	<i>%</i>	
A Agriculture, Forestry and Fishing	6	4.7	108.4	43.8	18.1
C Manufacturing	16	12.5	13.4	5.4	0.8
D Electricity, Gas, Water and Waste Services	4	3.1	3.4	1.4	0.9
E Construction	10	7.8	10.6	4.3	1.1
F Wholesale Trade	32	25.0	36.0	14.6	1.1
G Retail Trade	7	5.5	1.9	0.8	0.3
I Transport, Postal and Warehousing	16	12.5	61.4	24.8	3.8
L Rental, Hiring and Real Estate Services	6	4.7	2.1	0.9	0.4
M Professional, Scientific and Technical Services	4	3.1	1.0	0.4	0.2
O Public Administration and Safety	1	0.8	0.3	0.1	0.3
S Other Services	24	18.8	7.2	2.9	0.3
Unknown	2	1.6	1.6	0.6	0.8
Total	128	100.0	247.2	100.0	1.9

Note: This table does not include the aerodrome which is located on a 159.5ha site.

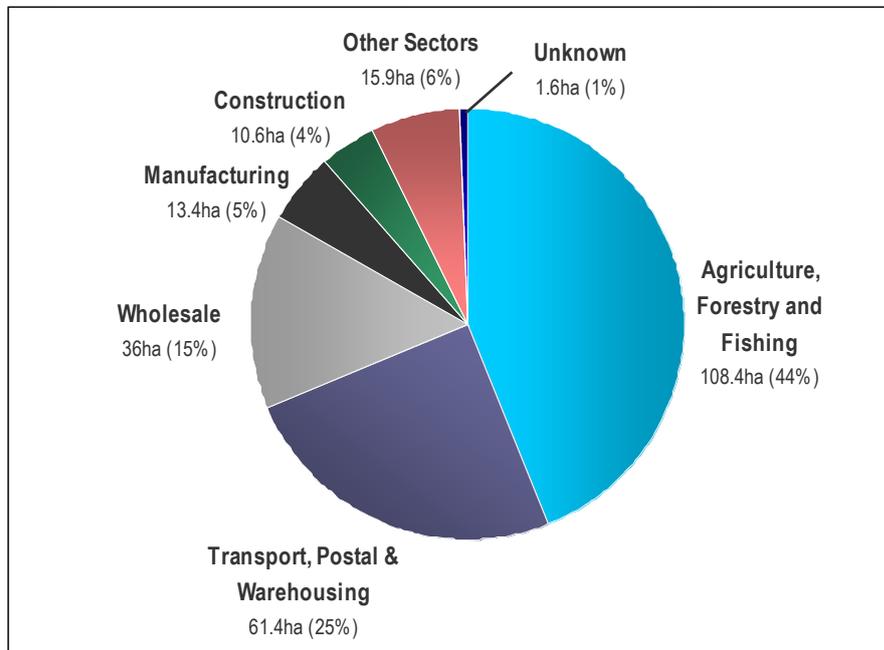
Source: Foresight Partners estimates, August 2010

Figure 4.1: Goondiwindi industrial businesses by top 5 ANZSIC categories, August 2010



Source: Foresight Partners estimates, August 2010

Figure 4.2: Goondiwindi occupied industrial area, August 2010



Source: Foresight Partners estimates, August 2010

The key characteristics of Goondiwindi Township’s industrial composition are summarised below.

- The largest industry sector in terms of number of businesses is Wholesale Trade, with 32 businesses, followed by Other Services (24 businesses) and Transport, Postal and Warehousing and Manufacturing (each with 16 businesses). Together these four sectors account for around two-thirds (69%) of all industrial businesses in Goondiwindi.
- Wholesale Trade is an important industrial sector in Goondiwindi, accounting for 25% of the industrial businesses and 15% of industrial land used. There are a range of wholesale businesses in Goondiwindi including fuel distributors and wholesalers of farm machinery, irrigation equipment and rural supplies.
- The industrial component of the Other Services sector includes businesses involved in the repair and/or maintenance of automotives and equipment and machinery. This sector accounts for 19% of businesses in Goondiwindi, but less than 3% of occupied industrial land reflecting the smaller nature of the businesses. Of the 24 businesses in this sector in Goondiwindi, 19 are related to automotive repairs and maintenance.
- The largest industrial sector in terms of land area used is Agriculture, Forestry and Fishing, which uses over 40% of Goondiwindi’s occupied industrial land. There are six businesses in this category, all in Agriculture Support Services. The large average area of these businesses is ‘skewed’ by the MacIntyre Cotton Gin on 101.2ha. The economic contribution of agriculture to the region is somewhat understated in the number of businesses in this category as there are additional businesses that are related to agriculture such as wholesalers of agricultural equipment, businesses involved in grain storage and sales and agribusinesses which are included under other ANZSIC categories.
- Transport, Postal and Warehousing is the second largest industrial category in terms of land use, primarily reflecting the two large Graincorp sites used for grain storage, which together account for 48.6ha. Other activities in this category include other grain storage operations, road freight businesses and Queensland Rail depots.

4.2 INDUSTRIAL LAND SUPPLY

There is a total of approximately 749ha of industrial zoned land within Goondiwindi (Table 4.2). Approximately 30% of this land (227.3ha) is occupied by industrial businesses, with a further 21% occupied by the aerodrome. The remaining industrial land is vacant (312.7ha), underdeveloped (33.9ha) or occupied by non-industrial businesses including a truckstop and two tourist parks (15.6ha).

Vacant and underdeveloped land together account for close to half (46%) of all industrial zoned land in Goondiwindi. Figure 4.3 shows the geographical distribution of this land.

There were an additional 19.9ha of non-industrial zoned land supporting industrial businesses. This was comprised of:

- 10.5ha of urban zoned land supporting 38 industrial businesses across most industry sectors such as automotive repairs, wholesale and retail;
- 5.8ha of commercial zoned land (most of which is located in the highway commercial precinct);
- 3.2ha of mixed use land supporting four businesses including container storage, a road freight company and a garden centre; and
- 0.4ha of low density residential land with a large animal vet clinic.

Table 4.2: Goondiwindi industrial zoned land

	Area (ha)	%
Industrial zoned land with businesses on it:		
- Industrial businesses	227.3	30.4
- Aerodrome	159.5	21.3
- Non-industrial businesses	15.6	2.1
Underdeveloped land	33.9	4.5
Vacant land/tenancies	312.7	41.7
Total Industrial zoned land	749.0	100.0
Non-industrial zoned land supporting industrial activities	19.9	

Source: Foresight Partners estimates, August 2010

Occupied lots were further analysed by lot size and divided into the following groups: under 0.4ha (very small lots), between 0.4ha and 1ha (small lots), between 1ha and 5ha (medium lots), between 5ha and 10ha (large lots) and over 10ha (very large lots).

Table 4.3: Distribution of industrial activities by lot size, GRC*

Lot size	No. lots		Total ha	
	No	%	No	%
4,000m ² and less	67	49.6	16.1	3.9
Between 4,000m ² and 1ha	35	25.9	19.8	4.9
Between 1ha and 5ha	26	19.3	51.8	12.7
Between 5ha and 10ha	1	0.7	9.8	2.4
Over 10ha	6	4.4	309.3	76.1
TOTAL	135	100.0	406.7	100.0

* Includes all industrial activities regardless of the zoning of the land. Where there were multiple businesses on one lot the lot size was apportioned to represent the area used by each individual business.

Source: Foresight Partners estimates, August 2010

Approximately half of all lots used for industrial activities in Goondiwindi are very small lots of less than 4,000m². An additional 26% are small lots of between 4,000m² and 1ha. Businesses in sectors that are not strictly industrial sectors typically require smaller lots, such as businesses in Retail Trade and Professional,

Scientific and Technical Services. Industrial businesses in the Other Services sector, which mainly include businesses involved in the repair and maintenance of cars, trucks and machinery, are also typically small lot users. Table 4.1 shows the average area occupied by businesses in each sector.

There are six very large lots of greater than 10ha each that account for 309ha or 76% of the land occupied by industrial activities. These are three Graincorp lots, two Goondiwindi Aerodrome lots and the Namoi Cotton Gin site.

4.2.1 Vacant Land

Vacant land includes the following:

- lots that are clear of any buildings or sheds and are therefore considered vacant and available for industrial activities; and
- lots that are being used for temporary activities, such as the storage of pipes and equipment during road and other infrastructure construction, but which will be vacant and available for development once temporary activities terminate.

In Goondiwindi Township, a total of 43 vacant Industrial zoned lots were identified, extending over approximately 313ha (including two lots which contain only a vacant industrial shed). The vacant lots are not concentrated in one area, but rather scattered around Goondiwindi (refer Figure 4.3). The only industrial area with minimal vacant land is the industrial area along Racecourse Road, where there was only one vacant lot.

Most of the vacant land is in large lots that have not yet been subdivided or developed. While 16 of the 43 lots are less than 1ha, they total only 6.5ha (approximately 2% of all vacant land).

There are nine vacant lots that are greater than 5ha each. These lots total 267ha, accounting for 85% of all vacant Industrial land in Goondiwindi. The largest vacant lot is located on Boundary Road. It is a 230.9ha lot, but only an estimated 170ha of the lot are zoned Industrial and therefore included as vacant Industrial land.

Table 4.4: Vacant and underdeveloped industrial zoned land

Size of lot	Vacant		Underdeveloped		Total	
	No. lots	Ha	No. lots	Ha	No. lots	Ha
4,000m ² and less	11	3.3	-	-	11	3.3
Between 4,000m ² and 1ha	5	3.2	6	3.3	11	6.5
Between 1ha and 5ha	18	38.9	6	10.6	24	49.5
Between 5ha and 20ha	3	19.2	1	7.8	4	27.0
Over 20ha	6	248.1	1	12.2	7	260.2
TOTAL	43	312.7	14	33.9	55	346.6

Source: Foresight Partners estimates, August 2010

4.2.2 Underdeveloped Land

Underdeveloped zoned industrial land includes the following:

- lots with a residential dwelling;
- lots that appear to be disused and have old, abandoned, buildings or sheds on site; and
- larger lots (over 0.5ha) being marginally utilised (typically under 25% of the site area, taking into account hardstand areas).

Within Goondiwindi there were 14 lots extending over approximately 34ha of Industrial zoned land that have been classified as underdeveloped. Most of these lots contain residential dwellings. A breakdown of underdeveloped lots by size is given in Table 4.4. Of the 14 lots, six are less than 1ha and six are between 1ha and 5ha. Most of the underdeveloped lots are located on or near Boundary Road. Figure 4.4 shows the distribution of vacant industrial lots by lot size.

4.2.3 Potential constraints

Goondiwindi Township is located on the Macintyre River and has experienced flooding in the past. However, there has been a levee protection system for many years, which was raised after the 1976 flood and again since then.⁷ All of Township's industrial zoned land is located within the levee system and is therefore not considered flood prone, and therefore not a constraint for industrial development. Nevertheless, it is understood that many lots are low lying and may require fill, which would act as a constraint in terms of additional costs to develop it for industrial uses.

Goondiwindi appears to have significant stocks of vacant and underdeveloped zoned industrial land. However, there appears to be relatively little *serviced* vacant industrial land. In smaller markets such as Goondiwindi, this can be a significant constraint, especially where vacant land holdings are in larger parcels. As is discussed later, demand for industrial land is generally low, which makes investment in industrial sub-division and service provision problematic. The reluctance or inability of owners of larger industrial land holdings to invest in sub-dividing and servicing their land is partly a function of the lack of a sufficiently large and active industrial market to warrant the upfront financial outlay.

Thus, despite Goondiwindi's relatively large supply of vacant and underdeveloped industrial land, the effective and market-ready land supply picture is somewhat different.

⁷ Cardno Lawson Treloar (2007), *Goondiwindi Environs Flooding Investigation*, prepared for Waggamba Shire Council.

4.2.4 Industrial activities in the Mixed Use zone

The former Waggamba Shire Planning Scheme's Mixed Use zone, centred on Polo Road, north of Hungerford Street, also contains some industrial activities. The Mixed Use zone is an intermediate zone between the Urban and Industrial zones intended for residential (detached houses) and small scale industrial uses, where conducted in association with the residential dwelling.

Our reconnaissance of this area revealed a few industrial activities, such as container storage, garden centre, a shade sail business and transport (prime mover and trailer parking). However, there are likely to be more industrial activity in the Mixed Use zone than is evident by observation.

Most developed lots are between one and two hectares in size. Though many of these lots with a detached dwelling also had one or two sheds, not all had business signage to indicate that they were in fact used for industrial purposes. Some appeared to be used for storage of equipment, rather than for an active industrial enterprise.

While perhaps some activities in the Mixed Use zone could (or should) operate from zoned industrial sites, this intermediate zone does appear to fill a need, especially for small enterprises and seasonal support industries.

The Mixed Use zone probably also serves as a business incubator. Successful home-based businesses are likely to outgrow their residence-business site and need (or be forced) to relocate to an established and suitably zoned industrial area.

4.3 INDUSTRIAL DEVELOPMENT APPLICATIONS

Within Goondiwindi Township there are no large approved and pending development applications for industrial developments. There only appears to be one DA for industrial development which has not yet been built, and it is for machinery and equipment storage on an industrial zoned site on Gunn Street.

Over the past five years, the number of industrial DAs approved, and subsequently developed, has averaged approximately three or four developments each year. Most industrial related DAs are for a material change of use (MCU) for an individual lot, or for an extension to an existing business.

4.4 HISTORIC ABSORPTION RATES

This section examines historic industrial land demand in Goondiwindi, through the analysis of land sales in the 2000 to mid 2010 period. Data has been extracted from the Department of Natural Resources and Water database (via Price Finder).

Historic vacant or unimproved land sales data is typically used as an indicator of potential future industrial land demand. This approach does, however, have some limitations. Speculators can buy vacant industrial land for investment purposes and leave it vacant for years before reselling it, which inflates the demand figures. In addition, industrial uses that have located outside of industrial zoned land are not captured in the sales data, therefore somewhat deflating demand figures.

Figure 4.3: Industrial activity in Goondiwindi

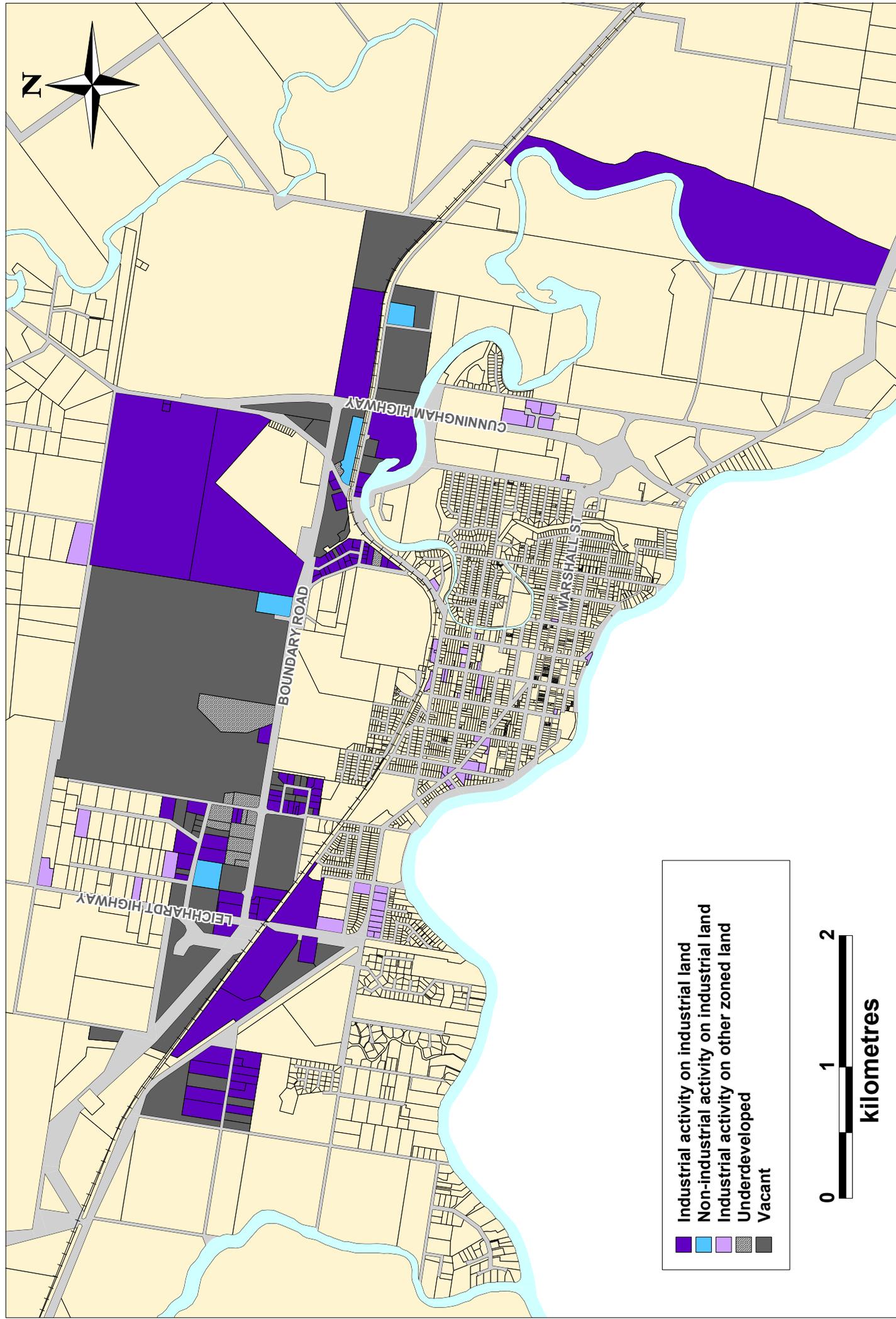
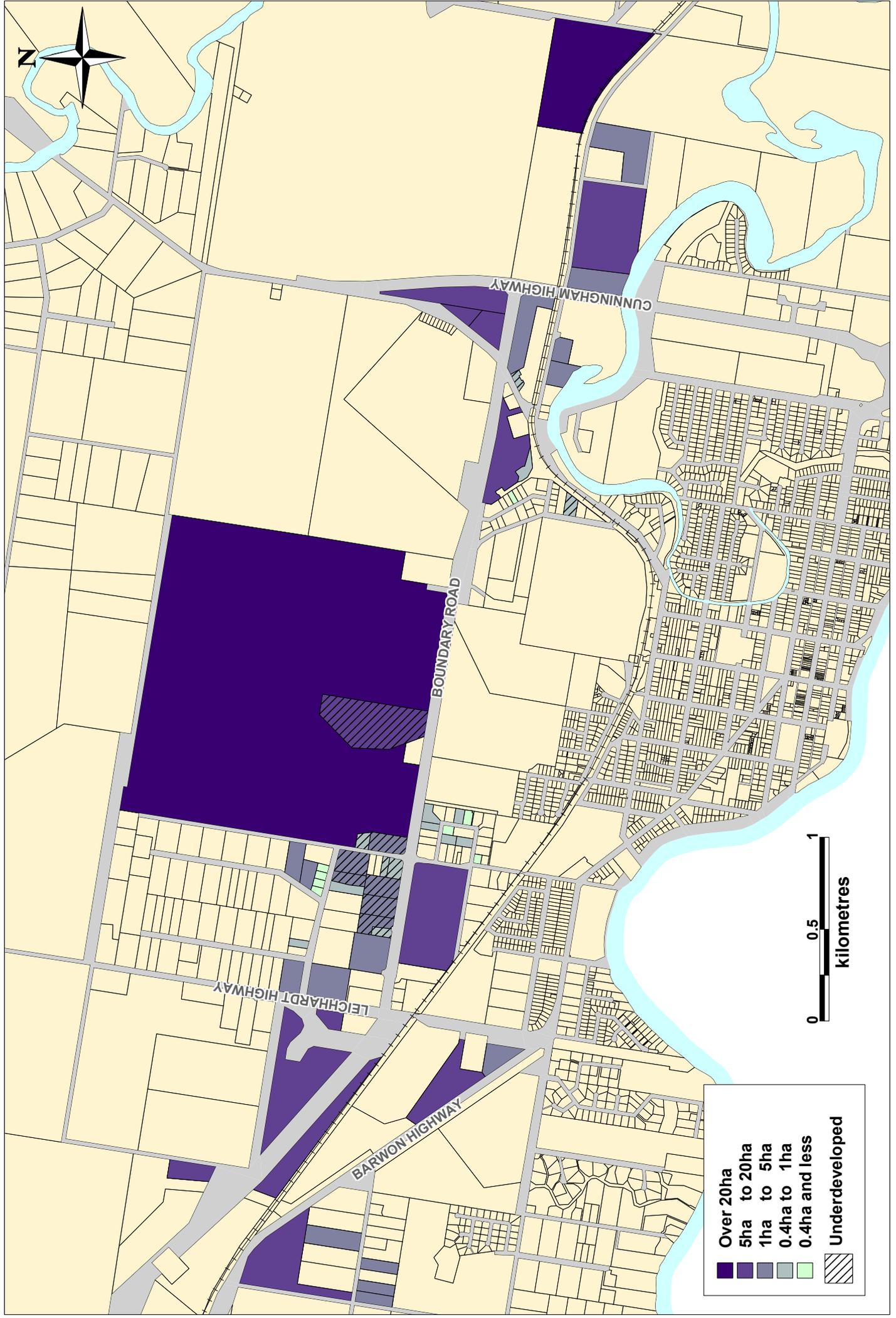


Figure 4.4: Vacant and underdeveloped industrial zoned land by lot size



Improved

Improved land comprises industrial zoned land with buildings or sheds on them at the time of sale. Table 4.5 summarises improved industrial zoned land sales for the town of Goondiwindi from 2000 to mid 2010.

Table 4.5: Improved industrial zoned land sales, Goondiwindi

Year	4000m ² and less			Over 4000m ²			Total		
	No. Sales	Area sold (ha)	Median price per m ²	No. Sales	Area sold (ha)	Median price per m ²	No. Sales	Area sold (ha)	Median price per m ²
2000	2	0.6	\$91.03	3	6.4	\$15.04	5	7.1	\$23.75
2001	6	2.0	\$17.00	2	5.2	\$13.72	8	7.3	\$17.00
2002	2	0.6	\$52.57	2	1.9	\$16.38	4	2.6	\$37.05
2003	2	0.6	\$94.83	2	2.4	\$18.31	4	3.0	\$52.10
2004	1	0.2	\$110.00	-	-	-	1	0.2	\$110.00
2005	3	1.2	\$63.36	2	1.8	\$69.29	5	2.9	\$64.44
2006	2	0.5	\$105.53	1	3.0	\$40.04	3	3.5	\$87.50
2007	-	-	-	3	5.7	\$54.93	3	5.7	\$54.93
2008	1	0.2	\$125.00	1	0.6	\$94.91	2	0.8	\$109.96
2009	3	0.7	\$164.02	-	-	-	3	0.7	\$164.02
2010*	2	0.6	\$138.83	1	1.6	\$35.62	3	2.2	\$115.00
Total 2000-2010	24	7.3	\$86.25	17	28.7	\$27.85	41	36.0	\$48.00
Total 2000-2004	13	4.1	\$46.25	9	16.0	\$17.41	22	20.1	\$21.63
Total 2005-2010	11	3.2	\$123.56	8	12.6	\$59.69	19	15.9	\$86.25
Average 2000-2010	2.2	0.7		1.6	2.7		3.8	3.4	
Average 2000-2004	2.6	0.8		1.8	3.2		4.4	4.0	
Average 2005-2010	1.8	0.5		1.3	2.1		3.2	2.6	

* Part year sales to about August.

Source: Price Finder and Foresight Partners calculations

Analysis of the sales data shows:

- Over the 2000 to mid 2010 period there were 41 sales of improved industrial land totaling 36ha (excluding the sale of land that is occupied by residential dwellings).
- Lots of 4,000m² and less comprised over half of the sales – 24 of the 41 sales. The price median per square metre is considerably higher for these smaller lots at \$86 than the larger lots (\$28/m²), although the latter five year median prices (\$124/m² and \$60/m²) are the better measure of recent market prices achieved.
- The median price per square metre has shown an upward trend over the ten year period, though appears somewhat volatile from one year to the next, reflecting the small number of sales in each year.
- There is no discernable trend in the area sold each year which may also reflect the small number of sales.

Unimproved or vacant

Unimproved land comprises land that is vacant with no buildings on site. Table 4.6 summarises sales of unimproved industrial zoned land for the town of Goondiwindi for the 2000 to 2009 period. There were no sales recorded yet for 2010.

Analysis of the sales data shows:

- Over the 2000 to 2009 period there were 31 sales of improved industrial land totaling 111ha.
- Average yearly sales over the period were approximately 11ha. This is much higher than the average area of improved industrial land over the period, which averaged less than 4ha a year, despite fewer sales of vacant land.
- In contrast to improved land sales, lots over 4,000m² comprise the majority of unimproved industrial land sales (26 out of 31).
- There does not appear to be any distinct trend in the price per square metre of land over the 2000 to 2009 period, which reflects the relatively low number of sales and the differing characteristics of the land sold.

Table 4.6: Unimproved industrial zoned land sales, Goondiwindi*

Year	4000m ² and less			Over 4000m ²			Total		
	No. Sales	Area sold (ha)	Median price per m ²	No. Sales	Area sold (ha)	Median price per m ²	No. Sales	Area sold (ha)	Median price per m ²
2000	1	0.2	\$30.00	1	0.4	\$15.01	2	0.6	\$22.51
2001	-	-	-	1	14.8	\$1.39	1	14.8	\$1.39
2002	-	-	-	4	18.3	\$10.67	4	18.3	\$10.67
2003	-	-	-	2	2.4	\$6.56	2	2.4	\$6.56
2004	1	0.2	\$24.60	1	22.8	\$1.73	2	23.0	\$13.17
2005	1	0.4	\$43.75	5	24.3	\$8.74	6	24.7	\$13.58
2006	2	0.8	\$23.02	3	6.4	\$20.94	5	7.2	\$20.94
2007	-	-	-	4	9.0	\$12.41	4	9.0	\$12.41
2008	-	-	-	4	6.9	\$12.41	4	6.9	\$18.18
2009	-	-	-	1	3.8	\$11.62	1	3.8	\$11.62
Total 2000-2009	5	1.6	\$25.54	26	109.2	\$9.43	31	110.8	\$15.01
Total 2000-2004	2	0.4	\$27.30	9	58.8	\$6.56	11	59.2	\$6.56
Total 2005-2009	3	1.2	\$25.54	17	50.4	\$14.70	20	51.6	\$17.16
Average 2000-2009	0.5	0.2		2.6	10.9		3.1	11.1	
Average 2000-2004	0.4	0.1		1.8	11.8		2.2	11.8	
Average 2005-2009	0.6	0.2		3.4	10.1		4.0	10.3	

* Includes four instances of resales - where a lot was sold twice in the 10 year period

Source: Price Finder and Foresight Partners calculations

Excluding resales, the approximately 102.2ha of vacant land sold represents an average of just over 10ha *per annum*. However, most of the vacant land recorded as sold over the past ten years remains vacant. This suggests that historic sales of vacant land are not a good 'proxy' for demand in Goondiwindi. This is discussed further in Section 7.3.

In addition to the industrial zoned land sales in Table 4.6 above there were a number of sales on the eastern side of the Highway Commercial precinct – an area which has developed mainly as a light industrial area. Between 2000 and 2009 there were eight sales in this area, with a total area of 11.1ha. The median price of the sales was \$25/m².

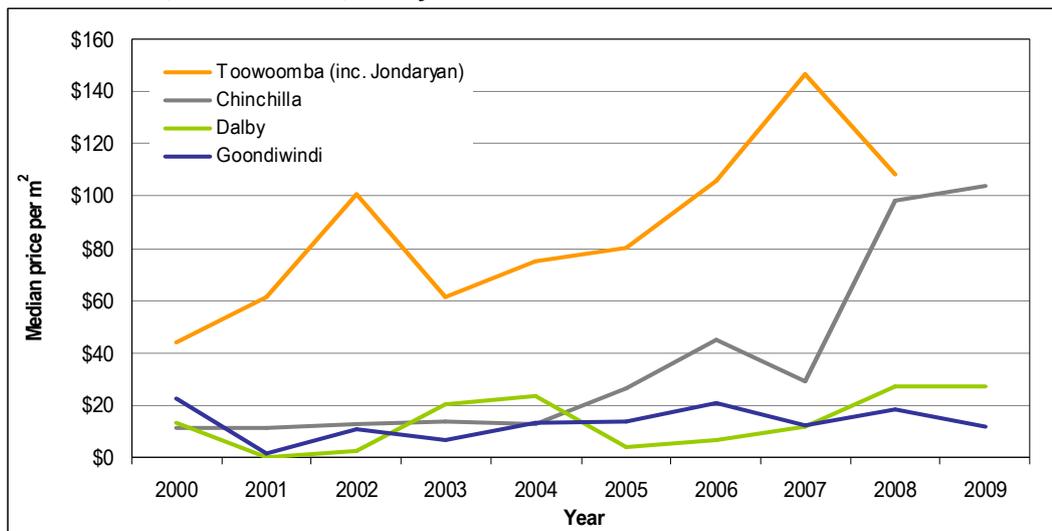
Median Price per m² in Context

Goondiwindi Township’s industrial activities are a mix of businesses serving the local population, and therefore prefer or need to be close by, and primary producers in the region, who are less constrained by location, particularly with respect to wholesaling, warehousing and storage and transport. Some businesses, (e.g. transport, wholesaling) are relatively footloose and could serve the Goondiwindi region from elsewhere. Also, new footloose and other businesses seeking to establish in the Darling Downs region, might consider a number of potential locations.

It is therefore useful to compare the median prices being achieved in selected other Darling Downs markets. Foresight Partners has undertaken a number of industrial land demand investigation in the Darling Downs area over the past two years which enables such comparisons to be made.

Figure 4.5 shows the historic median price per square metre of vacant industrial zoned land for Goondiwindi, Toowoomba (including the former Jondaryan Shire), Dalby Township and Chinchilla. Toowoomba was selected as a comparison because it represents the largest major industrial market serving the Darling Downs. However, our data analysis for that area only included sales up to 2008. Dalby and Chinchilla were chosen as they represent smaller industrial markets, also within the Darling Downs and are also situated along a major transport corridor, the Warrego Highway, and also have rail access.

Figure 4.5: Median price per m² of unimproved industrial zoned land – Goondiwindi, Toowoomba, Dalby and Chinchilla*



* Toowoomba analysis only extended to 2008. The increase in the median price for industrial land in Chinchilla in 2008 and 2009 was largely due to sales of very small lots
Source: Price Finder and Foresight Partners calculations

The median price of vacant industrial land in Toowoomba is considerably higher than in Goondiwindi, reflecting Toowoomba's role as a major commercial and industrial centre and its proximity to Brisbane. In turn, Toowoomba's vacant land prices per square metre are considerably below those achieved in metropolitan Brisbane (\$300-\$400/m²). Over the 2000 to 2007 period median prices in Toowoomba more than tripled reflecting both growing demand and a tightening of supply. Prices declined sharply in 2008 due to a number of factors, including Toowoomba's well-publicised water shortage crisis and the onset of the global financial crisis. While 2009 Toowoomba sales data has not been extracted for this study, a 2010 market report by Herron Todd White⁸ suggests that Toowoomba's industrial market remains subdued.

Dalby and Chinchilla are smaller industrial markets with median prices of industrial land more comparable to prices in Goondiwindi, at least up until about 2007. Median industrial land prices increased sharply in Chinchilla from 2004 to 2009. The high prices in 2008 and 2009, however, should be treated with caution as they reflect a large proportion of small lot sales, which are expected to be used for residential purposes. However, speculative sales related to coal mining and coal seam gas projects in the Wandoan area have also contributed to the sharp increase in median prices.

In contrast to the Toowoomba and Chinchilla markets, median prices in Goondiwindi and Dalby have shown relatively stable prices. This suggests that there has been no significant growth in demand for, or perceived shortages of, industrial land in Goondiwindi and Dalby between 2000 and 2009.

4.5 SUMMARY AND IMPLICATIONS

- Goondiwindi Township's industrial business inventory indicates a broad industrial base with no obvious or unexpected gaps (e.g. mining). Wholesale Trade, Transport, Postal and Warehousing, and Manufacturing are dominant in terms of number of firms but many are related to, or support, agricultural production.
- Agriculture dominates industrial land uses by virtue of the MacIntyre Cotton Gin occupying 101ha or 41% of all land (247ha) occupied by industrial activity. Excluding the cotton gin, Transport, Postal and Warehousing, and Wholesale Trade account for about two-thirds of all land used for industrial purposes.
- Goondiwindi Township has a total zoned industrial land supply of 749ha, including the 160ha aerodrome. Of this, about 313ha is vacant and 34ha is underdeveloped. However, over half of this vacant land (170ha) is in a single large land holding on Boundary Road.

⁸ Herron Todd White (2010), *The Month In Review*, July 2010.

- The Township has ample vacant industrial land but very little of it is serviced or subdivided into smaller lots, with only about 7ha (16 lots) of less than a hectare. Thus, despite a very large potential supply of vacant land, it has relatively little land market-ready for firms seeking smaller, serviced lots.
- Council's Mixed Use zone, which allows small scale industrial uses in conjunction with residential, appears to fill a need, especially for small home-based enterprises and seasonal support industries. It probably also serves as a business incubator.
- Vacant land sales have averaged about 10ha *per annum* (excluding resales) over the past ten years, but this is a poor indicator of land take-up as most of this land remains vacant and still part of the potential supply.
- The median prices per square metre achieved for Goondiwindi Township's vacant industrial land have been relatively stable over time, suggesting no significant demand-generated market pressure for, or perceived shortages of, industrial land.

5 Industry and Stakeholder Discussions

This section summarises the outcomes and main points of telephone and face-to-face discussions undertaken with a range of businesses, property agents and others regarding Goondiwindi's commercial and industrial land and future opportunities. Many of the issues raised and topics discussed were held in common, and a discussion of each of the main issues/topics is presented below. Appendix E contains a list of firms and agencies contacted.

5.1 BUSINESS AND STAKEHOLDER CONSULTATION

5.1.1 Business discussions

Telephone discussions were undertaken with a variety of businesses in Goondiwindi. These discussions followed a structured format and obtained a similar range of information from representatives of ten firms.

The discussions canvassed details on location decisions of the business, future challenges to the business and advantages and disadvantages of Goondiwindi as a business location. It should be noted that these discussions were mainly qualitative in nature and not a sample survey designed to produce numerical or tabulated results.

The businesses contacted represented a range of sectors:

- four in Wholesale/Retail;
- three in Manufacturing;
- two in Transport; and
- one in Other Services - Repairs and Maintenance.

The key points arising from the discussions are summarised in Table 5.1 below.

Table 5.1: Summary of discussions with Goondiwindi businesses

<i>Issue</i>	<i>Comment</i>
Where business was established and length of time at site	<ul style="list-style-type: none"> • All businesses apart from one established in Goondiwindi, with one being established in Moree then opening an additional branch in Goondiwindi. • Five of the nine businesses that established in Goondiwindi have moved to another site in Goondiwindi. • The length of time at site ranged from 2 years to 25 years. On average businesses had occupied their current site for 12 years.
Reasons for choice of site	<ul style="list-style-type: none"> • Most respondents indicated that their business was located in Goondiwindi because that is where they live. • Specific sites were chosen for a variety of reasons including accessibility, proximity to the highway, availability of sites and exposure. • Two businesses are located where they are because they took over existing businesses.

<i>Issue</i>	<i>Comment</i>
Main markets for output	<ul style="list-style-type: none"> • All businesses apart from one have a larger market than just the local area. This reflects the nature of the businesses spoken to, which were typically larger businesses. • Most businesses have markets that extend into northern and central NSW and central Queensland. Three businesses indicated that they served a national market, and one large business has a major export focus. • The one business that serves only the local area in repairs and maintenance. There are a number of ‘population serving’ businesses of this nature in Goondiwindi that would also serve mainly the local market.
Source of inputs	<ul style="list-style-type: none"> • Approximately half of the businesses indicated that they get some of their inputs locally. However, most inputs come from Brisbane, Sydney and Melbourne. • Four businesses source some of their inputs from overseas – two obtain specialised equipment/parts from the United States, and two import agricultural inputs from Asian and other countries.
Employment numbers	<ul style="list-style-type: none"> • The number of employees per business ranged from three to 40. The average number of employees per business was 15.
Plans to expand in next five years	<ul style="list-style-type: none"> • Six respondents indicated that they hope to expand their business operations in the next five years. All of these businesses could expand their operations on their current site and would not need to relocate.
Future challenges of business	<ul style="list-style-type: none"> • Approximately half the businesses identified season and weather related challenges, reflecting their reliance on agriculture. • Four respondents indicated that staffing could be an issue – both finding and retaining good staff. • Three people mentioned government regulations and/or taxes as being a challenge for their business.
Advantages of Goondiwindi as a business location	<ul style="list-style-type: none"> • Most respondents recognised Goondiwindi’s location as an advantage – located on major highways and on the Queensland-New South Wales border. • Goondiwindi’s agricultural base and its proximity to large cropping and irrigated agriculture producing regions were identified by many respondents as important advantages. • Other advantages identified included its relative isolation, which helps minimise competition, its reasonable size and its proximity to Toowoomba (two hours drive) and Brisbane (four hours drive).
Disadvantages of Goondiwindi as a business location	<ul style="list-style-type: none"> • There was little agreement among respondents on the disadvantages of Goondiwindi. The most common responses related to the distance from major cities/suppliers/Brisbane port and the cost/availability of freight. • Other disadvantages included the roads, a limited customer base and a poor rail system with not enough trains.

<p>What can GRC do to improve Goondiwindi as a business location</p>	<ul style="list-style-type: none"> • There were a number of suggestions as to what Council could do including <ul style="list-style-type: none"> - install and pay for infrastructure to attract businesses to town - improve infrastructure such as water supply - work on flood crossings - do up the main street - be less restrictive in terms of zonings and the red tape people need to go through to get building permits • Four respondents indicated that they could not think of anything that Council could do.
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Source: Foresight Partners structured discussions, September to October 2010

5.1.2 Discussions with Property Agents

Discussions were held with four real estate agents active in the commercial and industrial markets in Goondiwindi with respect to the town's industrial and commercial markets, turn-away demand and other matters.

Industrial Land

All but one agent indicated a need for more *developed* industrial land in Goondiwindi, with services including roads, water and three phase power. One pointed out that there was no current demand for industrial land due to recent drought conditions in the surrounding region but recognised that demand would pick up after an improvement in the season. Agents also indicated a need for an industrial estate with smaller sized blocks to cater to demand from agricultural machinery operators.

With respect to turn-away demand, responses were mixed. Latent demand occurs when potential buyers are unable to enter the market because of a lack of adequate and suitable land supply (zoned industrial) to meet requirements. This usually indicates a need to supply additional industrial land in more appropriate lot sizes, price range and/or location to capture such demand when it arises. Some agents indicated that they had to turn away potential business because of not having the 'right' product available; others indicated that they had not.

Additional insights provided in discussions with agents included:

- most industrial land in Goondiwindi is owner occupied;
- the demand for industrial land is sporadic;
- the size of industrial lots demanded varies considerably, with no firm trend;
- industrial land is developed on demand, and really only if there is a committed tenant; and
- an issue with the lack of 'as of right' development and the cost and time involved with getting an application approved.

Commercial Land

Property agents said that there are not many vacant retail or commercial premises in the main street, but at the same time suggested that there has not really been much turn away demand. It came out of the discussions, however, that it can be difficult/frustrating for people to find the right premises because commercial premises in the main street do not come up for sale or lease very often. One agent suggested that a butcher could not find suitable premises in the main street so had to locate in Waggamba Square.

Agents identified that the retail strip is more contained than the commercial zoned area may suggest, and implied that the demand is mainly for premises along the main street in what could be considered a compact area of pedestrian traffic.

5.1.3 Other Stakeholder Discussions

Telephone discussions were held with representatives of the Department of Infrastructure and Planning (Toowoomba and Brisbane), Border Rivers Chambers of Commerce, Moree Plains Shire Council and others regarding future infrastructure, major projects or other potential future opportunities (and constraints) which might influence future population growth, economic activity and subsequent demand for commercial and industrial land. Some of the key comments emerging from these discussions were:

- Goondiwindi is at the very southern periphery of the Moonie and Surat Basin coal, gas and petroleum areas and other towns are better placed to service the future development of these resources. Roma, Miles and Chinchilla, Dalby and Toowoomba are likely to benefit most from future energy projects.
- No major infrastructure projects of a scale likely to affect Goondiwindi Township's future direction could be identified. The Melbourne-Brisbane Inland Rail project, if built on the preferred alignment, would pass through Moree and North Star in NSW, and then on to Yelarbon, Inglewood and Millmerran in Queensland. Construction crews might provide a temporary economic boost to the region, but mainly for towns directly along the alignment.
- Goondiwindi is perceived as a slowly growing but 'solid place'. There is nothing on the horizon that might suggest an industry or commercial opportunity is out there that might boost Goondiwindi's population growth above current projections, and therefore boost any consequent commercial or industrial land demand.
- The Goondiwindi (and northern NSW) region is one of the most productive wheat areas in the country. Agriculture is the economic lifeblood of the region and the reason for the town's existence. Its future will rise and fall with the vagaries of agriculture (being at the mercy of weather, drought and fluctuating commodity prices). Nevertheless, Goondiwindi probably is not capturing the secondary agri-business opportunities that it might through more vertical integration.

- Growth in home businesses, such as hairdressing and small professional offices, is hurting main street, but there is probably very little Council can do about this.
- Parking for trucks and road trains is an issue in Goondiwindi. The town is a change-over centre for interstate drivers and trucks are parking, and double-parking, in areas where they should not. Given the importance of transport to the local economy, more or better facilities should be provided.
- Goondiwindi has more than enough industrial land but it is not much use if people cannot afford to service it. Landowners cannot afford to sub-divide and service their land because industrial land moves very slowly here. Most do not have the money to take the risk.
- Council needs to recognise commercial realities and work with the private sector to get the necessary infrastructure in place, rather than rely on landowners and developers to pay for everything. Goondiwindi's industrial market is too small and therefore risky for either party to do things alone.
- Goondiwindi is a small town and finding skilled workers is a perennial problem in growing a business here. It can take a long time to put together a team of skilled and qualified people—they simply are not available here (or in other small towns). Once you find them, you then have to find ways to keep them here. However, Goondiwindi is not unique, as even much larger rural towns have similar problems in securing sufficient skilled (and unskilled) workers.
- Council is doing a pretty good job in making Goondiwindi a good place to do business, but should recognise that the future of the town lies with the locals—private businesses in concert with Council—to invest in the town's future prosperity. It cannot rely on someone coming in and investing in the town.

5.2 COMMON TOPICS AND ISSUES RAISED

There were some issues and topics raised in discussions that were mentioned by a number of people. The messages we were getting were quite consistent, with business operators, real estate agents and other stakeholders talking about many of the same issues.

5.2.1 Accessibility

In terms of business and industry, one of Goondiwindi's key advantages compared to other towns is its location on major highways and on the Queensland/New South Wales border. The markets for many of its businesses reflect this with markets stretching into Central Queensland as well as into New South Wales. Most businesses source inputs and supplies from Toowoomba, Brisbane, Melbourne and Sydney.

Accessibility and connectivity with markets and sources of inputs is, and will remain, a key issue for businesses located in Goondiwindi. A number of businesses identified distance from suppliers or a main city as a disadvantage of Goondiwindi. While this is a factor that cannot be changed, suggestions were made regarding improving roads, flood crossings and rail infrastructure.

Freight was also mentioned by many people – ironically by some as an advantage of Goondiwindi and by others as a disadvantage. While comments were somewhat inconsistent among respondents, the importance of reliable and inexpensive freight was highlighted. It is primarily freight services that provide the necessary connectivity between Goondiwindi and sources of inputs and markets for products, and as such it is a vital service for Goondiwindi.

5.2.2 Supply chains

Discussions revealed that many of the selected businesses sourced local products and inputs when possible. However, this seems to be quite limited resulting in only modest supply chain linkages or interaction between the businesses in Goondiwindi. Most linkages relate to services such as electrical services and repairs and maintenance of equipment and machinery. Most physical inputs come from Toowoomba or, more often, Brisbane, Sydney or Melbourne.

However, it is evident from observation that, as would be expected, a good deal of Goondiwindi's industrial (and some commercial) firms are directly or indirectly linked to the region's primary producers. Some supply growers with seed, fertilizer, chemicals, machinery and machine servicing. Others store, treat or process, and then transport wheat, cotton and other agricultural commodities and products to national and international markets. These linkages are clearly evident in the predominance of Wholesale Trade, and Transport, Postal and Warehousing firms in Goondiwindi's industrial composition.

The reliance of many businesses on agriculture is also reflected in the number of business operators that identified Goondiwindi's proximity to agricultural production as a key advantage, and who also mentioned seasonal impacts or weather related issues as major challenges for their business over the next five years.

At first glance, the most obvious future opportunity would be to seek ways to strengthen the existing supply chain relationships with the region's primary producers. However, the relationships between the region's primary producers and town-based supply, service and transport industries have developed and evolved over a long period of time and there is little evidence of inefficiencies or gaps that might give rise to major new business opportunities.

Infrastructure

While only two business operators mentioned infrastructure as an issue, it was also raised by real estate agents and members of the Border Rivers Chamber of Commerce as an issue. The cost for individual businesses to put the necessary infrastructure in place to set up their business – sewerage, water, three phase power and, in some situations, roads – can be a large cost, and it was suggested by a few people that it is a deterrent for businesses to locate in Goondiwindi. One person suggested that Council install the infrastructure to attract industrial businesses to the town.

Water reticulation requirements for fire management in particular were mentioned by a number of business operators, land owners and agents. It was noted that was is expensive to meet the on-site firefighting requirements without a reticulated water supply and a prohibitive financial burden, particularly for smaller businesses.

5.2.3 Red tape and delay

The Council was mentioned by a number of people as being a major constraint to industrial and commercial development. Quotes from people include:

“Council are very anti-development.”

“Council is clueless about commercial realities.”

“Council are not here to support you.”

“Council take a defensive view rather than a proactive one.”

It should be noted that while this is not the view of all businesses/agents in the town, the fact that numerous people mentioned it indicates that it is an issue.

Specific complaints related to the lack of ‘as of right’ development, the red tape people need to go through to get building/development permits and the time taken in the approval process. Ultimately this slows and/or inhibits sales of commercial and industrial land and subsequent development of business activity and employment.

5.3 OTHER FACTORS INFLUENCING FUTURE DEMAND

Other sources of demand and factors that could influence future demand were identified through our discussions and investigations.

Business Expansion

A key source of demand for additional industrial land is likely to come from existing businesses seeking to expand. It is, however hard to predict the amount of land that may be needed to accommodate such businesses.

Discussions with local industrial businesses indicated that the businesses that were planning on expanding could do so on their current site. While this was only a small selection of businesses in the region it appears that this could be

representative of many businesses in Goondiwindi Township. Currently, many industrial lots appear only partly used, which suggests a capacity to expand on site.

As a consequence, some of the likely future business demand for industrial land will be met within existing premises and industrial lots, and could dampen demand for the production of new lots and the need for additional zoned land.

Exogenous Demand

Some demand for industrial land can come from large enterprises seeking large sites (exogenous demand). A large value-adding activity associated with the region's agriculture base, such as a flour mill, or a major warehouse/distribution firm (attracted by Goondiwindi's highway position) would be examples of such demand.

Future demand from these exogenous sources is virtually impossible to predict and plan for in advance. There is a strong element of serendipity and chance, especially as such firms are actively sought by 'competing' towns and development bureaus.

Goondiwindi is fortunate in that it has ample industrial land to accommodate such demand. However, it is unrealistic to expect a landowner (or Council) to have large sites serviced and 'ready to go' in anticipation of future serendipitous opportunities for large enterprises as the costs of services and infrastructure would be steep (and risky). Nevertheless, Council can work to ensure that potential sites are identified and designated well in advance to seize such opportunities if and when they arise.

Coal seam gas/mining

As noted in earlier comments, Goondiwindi is situated at the southern periphery of the Moonie and Surat Basin, and is unlikely to benefit from their development. Even if opportunities do arise in the longer term, they are more likely to be temporary in nature, such as work camps for construction crews. Other towns are geographically better positioned to service both the construction and on-going operations of future coal seam gas and mines

Future water allocations

The October 2010 release of the Murray-Darling Basin Authority's *Guide to the Basin Plan* has introduced some uncertainty as to future water availability under the proposed sustainable diversion limits for the Border Rivers Region. It is beyond the scope of this investigation to explore the potential implications, if any, for Goondiwindi Township's future industrial and commercial land demand.

One possible outcome, should future water allocations affect the viability of other smaller towns, could be that Goondiwindi's population could increase above current projections.

6 Future Commercial Land Demand

This section provides an overview of retail trends in regional areas and then presents estimates of indicative future retail and commercial demand based upon the population and household growth projections presented in Chapter 2.

6.1 RETAIL TRENDS IN REGIONAL AUSTRALIA

Retailing is a dynamic industry, with periodic innovations and changes that impact upon retail forms and formats that have implications for forward land use planning. Some innovations over the past 20 years, such as the rise of retail showroom or bulky goods centres and factory outlet centres, have reached maturity and even market saturation (leading to market rationalisation and decline) in larger metropolitan markets. In provincial areas, these and other retail formats are still evolving and changing to cater to smaller markets.

Major supermarkets

Twenty years ago, the major chain supermarkets (Coles, Woolworths) required catchment populations of 15–20,000 people or more before they would enter a market. This ‘rule of thumb’ threshold for major supermarkets has fallen to around 8,000–10,000 people in major urban areas, and even less in smaller regional cities and towns. Greater efficiencies in-store and in supply and distribution logistics driven by technological advances, as well as tougher competition for market share and growth have helped lower these thresholds.

Both major chains, as well as larger independent operators (e.g. Supa IGA, Foodworks, SPAR) are actively seeking new store locations in provincial cities and towns previously deemed too small and lacking in growth prospects to warrant their interest. Establishment of Woolworths stores in Plainland (population 2,500), Pittsworth (population 2,800) and Fernvale (population 1,400) are recent examples of this shift in locational priorities. (Note that these stores also serve populations in surrounding rural areas as well as the town populations.)

This rough ‘rule of thumb’ suggests that the Goondiwindi catchment’s current population of about 13,000 is adequately served by the existing BiLo and Foodworks supermarkets. As projected growth between 2011 and 2031 is only expected to add between 1,200 and 2,750 people under the medium and high series population projections, Goondiwindi is unlikely to sustain a third major supermarket by 2031. However, this may not deter a new supermarket from seeking to establish in Goondiwindi in the future if it perceives a market opportunity or gap that is not being met by either or both of the existing supermarket operators.

Smaller supermarkets and grocery stores

Smaller independent supermarkets are highly variable in size and performance and no generally accepted population ‘rules of thumb’ or minimum productivity levels (turnover per square metre of lettable area) exist. Nevertheless, they can generally represent the key ‘anchor’ tenants in smaller towns and villages, and so are important to the local populations they serve. These stores, which might range in size from 300–1,500m² (gross lettable area) can be found in older main street buildings or as part of small local convenience centres of 500–2,000m².

Aldi, an international limited line, discount supermarket, is also establishing stores in smaller markets. It has recently established stores in Gatton and Warwick. Its stores average about 1,400m² in size and, as it carries only about 600-700 stock-keeping units (SKUs), it can only provide for part of the household food shopping needs. By comparison a full-line supermarket of 2,500–3,500m² would carry in excess of 20,000 SKUs.

Supermarkets, large and small, are the basic building blocks of a community’s retail infrastructure. Even very small populations of several hundred people can usually sustain a small grocery store or mixed business/general store to cater to immediate and basic needs, as is evident in the GRC’s smaller towns.

Discount department stores

Major discount department stores (Kmart, Big W and Target) typically range in size from 5,000–8,000m² and require much higher population thresholds of 40,000 or more within larger urban catchments, which they normally also share with major department stores (Myer, David Jones). In provincial cities, which lack the major department stores, the threshold is lower (e.g. 25,000 or fewer people).

Some smaller provincial towns and areas support smaller discount department stores. For example, Big W operates a 4,000m² store as part of a shopping centre in Kingaroy, and Kmart operates a free-standing store of 4,160m² in Innisfail. However, both areas (South Burnett and Cassowary Coast Regional Councils, respectively) have larger populations than the GRC and the Goondiwindi catchment. A 5,000m², free-standing Big W store has just opened (June 2010) in Inverell’s town centre and one is approved for Moree (but its timing remains uncertain).

While the introduction of a small discount department store (Kmart, Big W or Target) in Goondiwindi is a *possible* longer term next step in its retail provision, population growth prospects suggest that this is unlikely within the 2031 time frame.

Bulky goods and other large format retailers

A small number of retail showroom/bulky goods retailers are evident in Goondiwindi, but Toowoomba is the where the majority of catchment residents would go for such purchases. Retail showroom developments can be ‘modular’ or scalable and are not as dependent upon an anchor tenant for their success. Consequently, these can be accommodated more or less in line with demand (assuming sites are available).

There are no set population thresholds for specific retail showroom activities, but these retailers are drawn particularly to areas with residential growth potential, and to older areas where householders are undertaking do-it-yourself renovations and home improvements. As ‘destination’ retailers, they have more leeway in site location, but prefer to co-locate as part of existing retail areas, such as the town centre, or on major arterial roads such as the Cunningham Highway, provided the sites have good visibility and accessibility.

6.2 IMPLICATIONS OF POPULATION GROWTH FOR RETAIL SPENDING AND RETAIL PROVISION

Average retail expenditure levels for the catchment were derived using income data from the 2006 Census, the 2003–04 Household Expenditure Survey, and National and State Accounts data on final household consumption published by the Australian Bureau of Statistics (ABS). Dollar values from these sources were inflated to common December 2009 dollar values using the Brisbane Consumer Price Index and other data.

Average household retail expenditures for each area were compiled by the broad retail categories identified earlier in Section 3.1.2. It is virtually impossible to define mutually exclusive household expenditures by major store type because of the broad and overlapping range of goods and services offered by retailers. Consequently, estimates of household spending cannot be taken as exclusively available for the support of any one particular retail activity.

Table 6.1 details the average annual household retail expenditure estimated for the Goondiwindi catchment. Average household expenditure levels for the Darling Downs Statistical Division and Queensland are shown for comparison.

Table 6.1: Average annual household retail expenditure potential, Goondiwindi catchment (2009 dollar values)

	<i>Take home food (\$)</i>	<i>Meals out/ take away (\$)</i>	<i>Apparel (\$)</i>	<i>Homewares/ services (\$)</i>	<i>Total (\$)</i>
Goondiwindi Township	10,600	3,510	2,540	10,430	27,080
Remainder of GRC	9,450	3,130	2,260	9,300	24,140
Northern NSW	9,750	3,230	2,340	9,590	24,910
Total catchment	10,020	3,320	2,400	9,860	25,600
Darling Downs SD	10,110	3,350	2,420	9,950	25,830
Queensland	11,040	3,650	2,640	10,860	28,190

Source: Foresight Partners calculations based on ABS 2003-04 Household Expenditure Survey and State and National Accounts data

6.2.1 Growth in Retail Spending Potential

Multiplying the average household expenditures by the number of households in the catchment produces an estimate of total retail expenditure potential for the forecast years of 2011–2031. Retail expenditure potential scenarios have been calculated for both the medium and high series population projections. Refer to

Table F1 in Appendix F for detailed estimates by commodity group. All expenditure estimates are in constant December 2009 dollar values.

Under the medium series projections, retail expenditure potential from households in the Goondiwindi catchment is forecast to increase from approximately \$131.9 million in June 2011 (in 2009 dollar values) to approximately \$164.3 million by June 2031. This represents an increase of about \$32.4 million or roughly \$1.6 million *per annum*. Much of this growth (\$23.0 million or 71.0%) is expected to be generated by household growth in Goondiwindi Township.

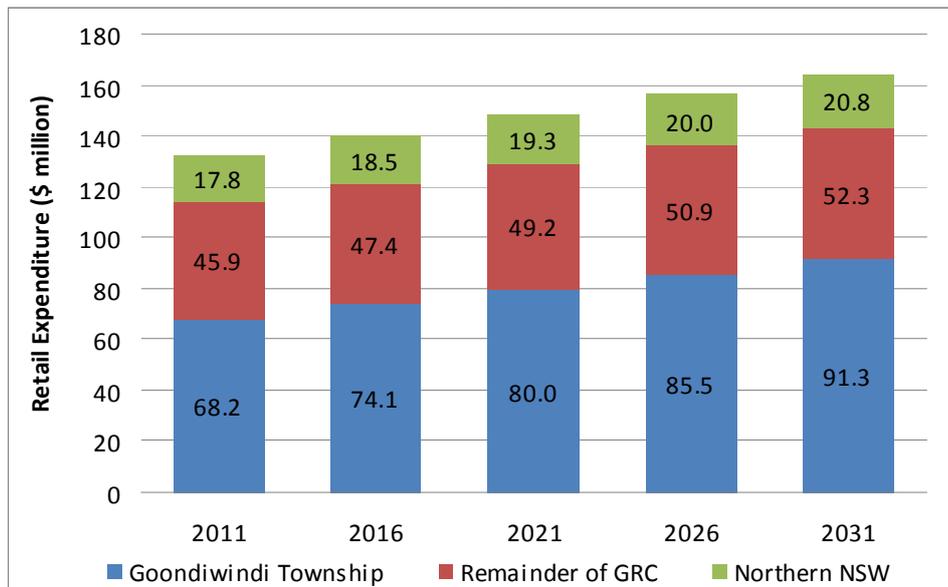
This \$32.4 million increase in retail spending will consist of:

- \$16.9 million in food spending (take home food, meals out/takeaway); and
- \$15.5 million in non-food spending (apparel, homewares/services).

Under the high series population projections, retail expenditure potential generated by Goondiwindi catchment households would increase by around \$48.6 million or by about \$16.2 million more than under the medium series projections. By commodity group, this increase will consist of \$25.3 million in food, and \$23.3 million in non-food spending by 2031.

It should be noted that no allowance has been made for inflation in forecasting future retail expenditure as inflation does not create demand for retail floor space. However a small increase of 0.5% *per annum* has been factored into the expenditure estimates for 2011 to 2031 to reflect assumed real increases accruing in household spending over this period.

Figure 6.1: Forecast Retail Expenditure Potential, Goondiwindi Catchment, 2011 to 2031 (Based upon Medium Series Population Projections)



Source: Appendix Table F1.

6.2.2 Additional Retail Floorspace

Additional retail floorspace potentially supportable by population growth in the Goondiwindi catchment can be derived by examining increases in future household spending. Population increases can also indicate whether growth in the catchment is likely to be sufficient to sustain additional major supermarkets and discount department stores.

Expenditure Based Estimates

Increases in future retail spending generated by growth in population and households can be translated into equivalent additional retail floorspace theoretically supportable using retail performance benchmarks.

Available retail spending between 2011 and 2031 is forecast to increase by \$32.4 million (or \$48.6 million under high series population projections).

Based on the Urbis Retail Averages 2008/09, FMRC Benchmarking and Foresight Partners' centre and retailer performance data, the following estimates of benchmark productivity levels (sales per square metre of floorspace) by food and non-food commodity groups have been used:

- \$8,500/m² for food retailers (supermarkets and food specialty shops, including take away food);
- \$4,500/m² for non-food retailers (including discount department stores, non-food specialty stores and retail services stores);

This results in an overall average or benchmark productivity level of about \$6,000/m² for total new retail floorspace. Applying these benchmark productivity levels to the increase in spending forecasts under the medium and high population series yields floorspace demand estimates ranging between 5,500m² and 8,200m² of theoretically supportable floorspace consisting of:

- 2,000m² and 3,000m² of additional food retail floorspace; and
- 3,500m² and 5,200m² of additional non-food floorspace.

Future increases in spending potential cannot be reserved or contained just for additional new retail floorspace in the Goondiwindi catchment. Existing retailers, including those in Inglewood and Texas, will seek to capture as much of this increase as possible to improve their performance or expand. Some spending, particularly for higher order retail goods, will continue to flow to Toowoomba and (to a lesser extent) Brisbane.

Population Based Estimates

An alternative method of translating future growth into the equivalent demand for major supermarkets and discount department stores is to use current provision of stores per measure of population. This method has some drawbacks, such as it cannot reflect differing socio-economic characteristics and retail spending potential of a specific area, and it is difficult to define geographic areas or boundaries that capture all relevant retail facilities and populations. By using large areas (i.e. Brisbane, West Moreton, Darling Downs and South West Statistical Divisions), the

boundary effect is minimised as the area incorporates much of South-East Queensland and inland Queensland and the major stores serving that population.

Table 6.2 sets out the number of major chain supermarkets (Woolworths, Coles, Supa IGA, and Bi-Lo) and discount department stores (Big W, Kmart, Target and Pick N Pay) operating in these Statistical Divisions, together with their estimated populations as at June 2009.

Table 6.2: Population per major store, Brisbane and Darling Downs Statistical Divisions, 2010

<i>Statistical Division</i>	<i>Population, June 2009</i>	<i>Major Supermarkets (No.)</i>	<i>Population per supermarket</i>	<i>Discount department stores (No.)</i>	<i>Population per discount department store</i>
Brisbane	2,004,262	179	11,200	50	40,100
West Moreton	94,660	8	12,000	-	-
Total	2,098,922	187	11,200	50	41,200
Toowoomba Stat Sub	128,600	11	11,700	3	42,900
Rest of Darling Downs	237,211	12	19,800	2	118,600
Total Darling Downs	365,811	23	15,900	5	73,200
South West	26,277	3	8,800	-	-

Source: ABS Regional Population Growth, Property Council of Australia, websites, Foresight Partners estimates.

The differences in population-to-store ratios between the Brisbane–West Moreton area, the Darling Downs and the South West area are due to the more dispersed populations in Darling Downs and South West Regions.

Other rural regions of Queensland do support discount department stores of much lower population-to-store ratios (e.g. Mt Isa and Innisfail). However, even at half the 41,000 persons per store ratio for Brisbane-West Moreton, Goondiwindi is not expected to garner an aggregate population catchment capable of supporting a major discount department store in the next 20 years.

Target Country is not classified as discount department store as it offers only a limited range of apparel and homewares, but it nevertheless partly fulfils this role in smaller towns. They have floor areas of up to 1,500m² and generally represent less than one-quarter of the size of a Target discount department store.

The population-to-store based approach, even using the Goondiwindi catchment's current population per store of about 6,500, indicates that there is little scope for Goondiwindi Township to support an additional major supermarket by 2031 under either the medium or high series population projections.

Table 6.3: Major supermarkets theoretically supportable by Goondiwindi catchment population, medium and high series projections, 2031

	<i>Medium series projections</i>		<i>High series projections</i>	
	<i>Population</i>	<i>Major Supermarkets (No.)</i>	<i>Population</i>	<i>Major Supermarkets (No.)</i>
2011	13,270	2.04	13,530	2.08
2016	13,620	2.10	14,150	2.18
2021	13,970	2.15	14,830	2.28

	<i>Medium series projections</i>		<i>High series projections</i>	
	<i>Population</i>	<i>Major Supermarkets (No.)</i>	<i>Population</i>	<i>Major Supermarkets (No.)</i>
2026	14,260	2.19	15,460	2.38
2031	14,530	2.24	16,100	2.51
Total increase: 2011-2031	1,260	0.20	2,570	0.43
<i>Current Goondiwindi Township population-to-store ratio</i>		<i>6,500</i>		<i>6,500</i>

Source: Foresight Partners estimates

6.3 THEORETICALLY SUPPORTABLE COMMERCIAL FLOORSPACE

Estimating commercial floorspace provision over the next two decades is more difficult to quantify. One approach in estimating potential increases in commercial floorspace required to 2031 is based on employment projections and employment density ratios for primarily office-based sectors. The projections are based on 2006 Census data and the medium series population projections presented in section 2.5.

In order to calculate population derived employment projections, and ultimately potential demand for additional commercial floorspace within the Goondiwindi Township, the total population projections for Goondiwindi Township (medium series projections, Table 2.2) were disaggregated by age and sex. The age and sex structure of PIFU's projections for the former Goondiwindi Town was applied to the population projections for Goondiwindi Township.

The ABS Census data was used to determine the participation rates (i.e. percentage of people in the labour force) and unemployment rates by age and sex for usual residents of the former Goondiwindi Town as at 2006. Data limitations dictated that the age-sex structure, participation rates and unemployment rates for usual residents of the former Goondiwindi Town LGA be used as a proxy for the larger Goondiwindi Township as defined for the catchment.

The participation rates and unemployment rates were held constant at 2006 levels and applied to each age group by sex to determine the projected employed labour force at five year intervals to 2031. This is the number of employed people who are projected to live in Goondiwindi Township. Some residents will, however, travel outside the Township to work, and similarly people from outside the Township – in surrounding rural areas and northern NSW – will travel in to Goondiwindi to work.

To account for residents of Goondiwindi Township who work outside, a labour force containment rate was applied. The labour force containment rate for Goondiwindi Township was estimated at 82% in 2006, meaning that 18% of employed people living in Goondiwindi Township travelled outside Goondiwindi Township for work. This is a relatively high level of containment and is likely to be the result of the distance to other large towns. The labour force containment rate over the projection period was held constant at 82%.

To account for people who reside outside Goondiwindi Township but work in the town the job containment rate was applied. Job containment was estimated at 17% in 2006, implying that 17% of people who work in Goondiwindi Township reside outside the Township and travel in for work. It was assumed that this would increase over the next 20 years as a lower percentage of people work in agriculture and a higher percentage of people travel in to Goondiwindi Township to work. It was assumed that by 2031, 20% of people working within Goondiwindi Township will be from outside the Township.

The labour force containment and job containment rates were applied to the forecast employed labour force to determine the projections for the number of people working within Goondiwindi Township (Table 6.5). The proportion of people working in primarily office-based sectors was held constant at the 2006 level of 16.7% (Table 6.4) for the projections to 2031.

The sectors defined as being primarily office-based commercial sectors were based on 2006 ANZSIC classifications and include:

- Information Media and Telecommunications;
- Financial and Insurance Services;
- Rental, Hiring and Real Estate Services;
- Professional, Scientific and Technical Services;
- Administrative and Support Services;
- Public Administration and Safety; and
- Arts and Recreation Services.

Table 6.4: Goondiwindi Township office-based workforce by sector, 2006

<i>ANZSIC Sector</i>	<i>% of workforce</i>
Office-based commercial	16.7
Information Media and Telecommunications	0.7
Financial and Insurance Services	2.6
Rental, Hiring and Real Estate Services	1.9
Professional, Scientific and Technical Services	4.6
Administrative and Support Services	1.1
Public Administration and Safety	5.3
Arts and Recreation Services	0.6
Other commercial	
Education and Training	6.5
Health Care and Social Assistance	10.1
Total retail*	26.8
Total industrial	33.5
Agriculture excluding Support Services [#]	6.3
TOTAL	100.0

* Total retail includes Retail Trade, Accommodation and Food Services and the Personal Services component of Other Services.

[#] Support services for Agriculture are included in Industrial

Source: Foresight Partners estimates based on ABS Census Working Population Profiles

Education and Training and Health Care and Social Assistance are typically classified as commercial sectors also. However, employees in these sectors are based primarily in schools and hospitals and other locations that do not typically occupy commercial offices, and are therefore excluded from this analysis.

Employment projections are presented in Table 6.5. Between 2011 and 2031 the total number of people employed in Goondiwindi Township is projected to increase by 340 people under the medium series population projections. Assuming that 16.7% of the workforce is employed in office-based sectors, this translates to an increase of approximately 55 office-based employees within Goondiwindi Township.

Table 6.5: Goondiwindi Township employment projections based on medium series population projections, 2011-2031

	<i>Total employees</i>	<i>Employees in office-based sectors</i>
2011	3,010	505
2016	3,160	530
2021	3,270	545
2026	3,310	555
2031	3,350	560
Increase 2011 to 2031	340	55

Source: Foresight Partners estimates

Assuming an average or benchmark of 15m² of floorspace per employee, 55 additional office workers would require approximately 825m² of additional commercial floorspace. This 15m² per employee falls in the range of 14-17m² per person suggested by Jones Lang Wootton for Insurance, Professional and Counselling firms⁹. Employment densities do vary, however, depending on the industry sector, the function of the company and the size and status of the company.

The additional floorspace that would be required to accommodate the office-based workforce under the high series population projections is highly dependent on the age-sex structure that is assumed for the population. Assuming the same structure as PIFU's medium series projections suggests that the additional floorspace required could be more than 2,000m² to accommodate 145 additional workers. However, if there is a higher proportion of people in older age groups, and therefore unlikely to be in the labour force, this requirement could be significantly less.

It should be noted that there are limitations to this method. Firstly, it assumes that all employees in the nominated sectors work in offices and that no employees in other sectors work in offices. Secondly, it assumes that current supply and demand equation is in balance and that additional floorspace should accord with the growth in the population (and therefore growth in the workforce).

⁹ Jones Lang Wootton (1990), *A Tenant's Guide to Moving Office*.

Given the nature and level of demand for retail floorspace within Goondiwindi and the relatively small population increase forecast, demand for commercial activity is unlikely to be significant. Some residents within the Goondiwindi catchment will still prefer to attend professional services in larger centres (such as Toowoomba) given the greater competition and variety of services found there. In particular, they often attend to a number of retail and professional service needs as part of fortnightly or monthly multipurpose trips to Toowoomba or even Brisbane. This suggests that part of any future demand for commercial floorspace generated by growth will continue to be met in Toowoomba or elsewhere.

6.4 SUMMARY AND IMPLICATIONS

- The relatively modest population growth projected for Goondiwindi's catchment to 2031, even under the high series projections, suggest that population increases are unlikely to generate demand for major additions to its retail facilities, such as a discount department store or third major supermarket, or significantly uplift its present role and function to a higher order centre of retail and commercial activity.
- In the unlikely event a proposal for a major new supermarket or discount department store arise in the future, it is essential that it locate within the existing town centre area to ensure its on-going vitality and viability.
- Future additions to Goondiwindi Township's retail provision are likely to be modest and readily accommodated within the existing town centre's zoned commercial area. Existing retailers will seek to improve their performance by capturing future increases in spending. Future growth in spending will be needed to help retain and strengthen existing traders within the Township, as well as support new specialty additions.
- Future demand for office and other commercial floorspace is likewise modest and can be accommodated within existing zoned land through redevelopment of existing sites and/or two storey development.
- There does not appear to be any need to extend the Township's Commercial zone to accommodate future retail and commercial development.

7 Future Industrial Land Demand

This section examines future industrial land demand in Goondiwindi Township area using a number of approaches, including:

- population based demand using per capita benchmarks;
- employment based demand assuming industrial employment densities; and
- historical take-up based upon vacant land sales.

Future industrial land demand is then reconciled with current vacant land supply to provide an indication of the future supply-demand balance.

7.1 POPULATION BASED DEMAND

A component of demand for industrial land is determined in part by population growth. As the population increases, more industrial services will be demanded to service this population. Several benchmark figures exist in Queensland for the amount of industrial land required per 1,000 persons. The former Department of Business, Industry and Regional Development¹⁰ identified planning benchmarks of 2.2–3.0ha (gross) per 1,000 persons as a minimum in 1995, but recognised that it ultimately depends on the individual area and the nature of its industrial base that will determine future needs.

The Department of Infrastructure and Planning recently undertook a study for the Wide Bay Burnett Region¹¹, in which 4ha (gross) of industrial land per 1,000 persons was used.

The nature of an industrial area and its growth prospects influence future provision, as will the current available supply (and usability) of industrial land. An industrial base serving mainly local markets (e.g. construction and service trades) requires very little land compared to one serving state, national or international markets (e.g. manufacturing, processing, transport and storage). Goondiwindi, as the service centre for large agricultural industry sector, sustains a mix of activities requiring large areas for storage and transport, as well as population-serving service and supply industries which do not require large sites or premises.

Applying the DBIRD benchmarks of 2.2 and 3.0ha per 1,000 persons and the benchmark of 4.0ha per 1,000 persons suggests that Goondiwindi ‘needs’ only a total of between 29 and 54ha of industrial land in 2011. This is just a fraction of the current amount of land being used for industrial purposes, which is approximately 247ha. This is due to the nature of some of the agricultural-based

¹⁰ Department of Business, Industry and Regional Development (1995), *Establishing Future Business and Industry Land Requirements and Identifying Strategically Important Sites*.

¹¹ Foresight Partners and AECOM (2009), *Wide Bay Burnett Economic Study – Preferred Patterns of Development*, prepared for Queensland Department of Infrastructure and Planning.

industrial business in Goondiwindi such as the Macintyre Cotton Gin, Graincorp and Woods Grain, which require large site areas.

These benchmarks alone are not sufficient for forecasting future demand, though they are useful in establishing a ‘baseline’ future demand for land to accommodate population-serving industries. The population of the Goondiwindi catchment is projected to increase by between 1,260 (medium series) and 2,570 persons (high series). Even under the high population projections and assuming a ratio of 4ha/1,000 persons, the additional industrial land required between 2011 and 2031 is only 10.3ha.

Table 7.1: Demand for additional industrial land based on population increases

	2011	2016	2021	2026	2031	2011-2031
Medium series						
Population	13,270	13,620	13,970	14,260	14,530	1,260
2.2 ha/1,000 people	29.2	30.0	30.7	31.4	32.0	2.8
3.0 ha/1,000 people	39.8	40.9	41.9	42.8	43.6	3.8
4.0 ha/1,000 people	53.1	54.5	55.9	57.0	58.1	5.0
High series						
Population	13,530	14,150	14,830	15,460	16,100	2,570
2.2 ha/1,000 people	29.8	31.1	32.6	34.0	35.4	5.7
3.0 ha/1,000 people	40.6	42.5	44.5	46.4	48.3	7.7
4.0 ha/1,000 people	54.1	56.6	59.3	61.8	64.4	10.3

Source: DBIRD 1995, Foresight Partners 2009; Foresight Partners calculations

7.2 EMPLOYMENT BASED DEMAND

Industrial land demand projections can be derived from employment projections and employment density ratios for industry sectors. The projections are based on projections of the workforce within Goondiwindi presented in Section 6.2.

The proportion of people working in industrial sectors was held constant at the 2006 level of 33.5% (Table 7.2) for the projections to 2031.

Table 7.2: Goondiwindi Township industrial workforce by sector, 2006

ANZSIC Sector	% of workforce
Industrial	33.5
Agriculture, Forestry and Fishing support services	2.8
Mining	0.1
Manufacturing	5.6
Electricity, Gas, Water and Waste Services	0.8
Construction	8.6
Wholesale Trade	4.3
Transport, Postal and Warehousing	5.7
Other Services - Industrial	5.7

Commercial	33.4
Total retail	26.8
Agriculture excluding support services	6.3
TOTAL	100.0

*Total retail includes Retail Trade, Accommodation and Food Services and the Personal Services component of Other Services.

Source: Foresight Partners estimates based on ABS Census Working Population Profiles

The sectors defined as industrial are shown in Table 7.2. Only the support services component of Agriculture, Forestry and Fishing was included because within Goondiwindi Township they are likely to be located on industrial zoned land whereas farming is located on Rural land.

Projections for the employed labour force in Goondiwindi Township are presented in Table 6.5. Between 2011 and 2031 the total number of people employed in Goondiwindi Township is projected to increase by 340 people under the medium series population projections. Assuming that 33.5% of the workforce is employed in industrial sectors, this translates to an increase of 115 industrial employees.

ABS employment data for 2006 and our inventory of occupied industrial land in August 2010 (excluding the cotton gin which is located on a very large site) suggests a very low employment density of just six persons per hectare in Goondiwindi. At this density, future industrial employment growth would require an additional 13ha over the next 20 years (or as much as 40ha under the high series population projections).

In metropolitan areas with large and diverse industrial precincts, employment densities of 30-50 people per hectare are common. Under this measure, Goondiwindi's industrial land demand would only amount to an additional two or three hectares over the next 20 years.

7.3 HISTORIC SALES BASED DEMAND

The number of vacant zoned industrial sales and area sold were summarised in Table 4.6 in Section 4. Excluding resales, some 102.2ha were sold over the 200-2009 period, which is an average of about 10.2ha a year.

Sales of vacant land are usually considered to be a good 'proxy' of take-up and past demand, and firm basis from which to forecast future demand. The past sales data implies demand of 10.2ha a year. However, historical sales are only a good proxy if most vacant land that is sold is subsequently developed and occupied. In Goondiwindi this is not the case with much of the vacant land sold over the past ten years remaining vacant.

Of this 102.2ha of vacant industrial land sold in the past 10 years, 93.9ha remain vacant. If only the land that is sold and subsequently developed is considered, it implies an annual take-up of only 0.8ha per year. Over a 20 year period to 2031, this implies a demand for only about 16ha.

7.4 SUMMARY AND IMPLICATIONS

- Future population and employment growth is likely to require only about 15–40ha of industrial land over the next 20 years.
- Goondiwindi Township area, with over 300ha of vacant zoned industrial land, has more than enough land to provide for its future needs.
- However, very little of this vacant land is appropriately subdivided and serviced to accommodate future growth.

8 Implications for the Future—Land Demand and Employment Opportunities

Goondiwindi’s current supplies of commercial and industrial land appear more than adequate to cater to future demand generated by modest population growth. Although land availability is not without some constraints, a bigger challenge will be to maintain and improve the town’s commercial and entrepreneurial environment in order to retain its current range and depth of businesses and industries, and make it more attractive to new business activities.

8.1 FUTURE LAND SUPPLY AND DEMAND

The detailed land inventory, land sales history and take-up rates, and population and employment forecasts indicate that current supplies of zoned commercial and industrial land are more than adequate to meet Goondiwindi’s future needs over the forecast period to 2031.

8.1.1 Commercial

Town centre commercial area

Although there is limited vacant land in the town centre area (less than a hectare) to accommodate future retail and commercial development, the area has sufficient under-developed land (about 6-7Ha) to enable opportunities for site amalgamation and redevelopment, should future market demand warrant. There does not appear to be any particular supply-demand issues in the town centre area, and there is no apparent need to extend the zoning in anticipation of future demand.

If new retail or commercial opportunities do arise and cannot be accommodated in the existing town centre, the next best option is to extend the boundaries so that the commercial area remains continuous, rather than fragment it with ‘gaps’. It should not be allowed to establish in the Highway Commercial precinct (if that were a realistic option) or elsewhere in the town area. Zone boundaries could be extended along Marshall Street, although this would reduce the compactness of the town centre and reduce its pedestrian-friendliness. Should St Mary’s Primary School on Brisbane Street ever seek to relocate, this would provide an opportunity to extend northwards, with perhaps less impact upon the town centre’s compact nature.

Within the Goondiwindi township area, there may be a future opportunity for an additional small convenience store and/or one or two shops to serve a ‘micro-market’, most likely near the town’s future residential growth areas towards the end of the 20 year forecast period. Should such a proposal arise, its approval should be subject to the satisfactory demonstration that there is a demonstrable community and planning need for such a development, and that it would not impact upon the vitality and function of the town centre.

Activities such as additional auto sales, garden nursery or similar low key commercial or retail uses requiring larger site areas are unlikely to be accommodated in the town centre, and their location elsewhere in the town would have minimal effect upon the vitality and viability of the town centre's main retail area.

Highway Commercial precinct

Current development of this area, at least on the eastern side of the Cunningham Highway, is light industrial in nature and is effectively part of the industrial land supply. However, there is considerable uncertainty as to the future use of portions of the available vacant Highway Commercial land. It is understood that further direct access to this land from the Cunningham Highway will not be permitted by the Department of Transport and Main Roads.

This means future development on the eastern side must use the existing (all turns) intersection via Wilson Court or via the roundabout and Kildonan Road/Johnston Road. The owners of the large northern part of the precinct also own a vacant lot fronting the northern part of Wilson Court. Presumably, future development of this lot will permit access to the larger lot. If not, the northern part the Highway Precinct site would appear to have very limited commercial or light industrial development options. In addition, recent residential subdivision along Johnston Road may also impact upon future uses of the site.

On the western side, BP owns the long narrow site from its service station and truck facility extending north along the Cunningham Highway, and McDonalds and motel accommodation adjoin the site to the south. Another owner has a similarly long and narrow lot behind BP's site but with frontage along the Lamberth Road residential area. Access and potential uses of this site also appear problematic, at least with respect to commercial and light industry uses.

Assuming suitable access to the undeveloped/vacant portions of the Highway Commercial precinct *can* be provided, this area represents a highly visible and desirable location. It would be attractive for more of the same types of uses already established there, as well as additional uses which would benefit from exposure and access from the Cunningham Highway, such as car and truck sales and service, auto accessories and tyre sales. Traditional shopfront retail development in this area should be discouraged and retained/directed to the town centre area.

Without further access points to the Cunningham Highway, or other access solutions, the future uses of a large part of the remaining Highway Commercial precinct for commercial-light industry type uses appears compromised. Consequently, the highest and best future uses of the remainder of the precinct might be for a mix of appropriately buffered residential, recreational and community uses which could be accessed by existing roads (e.g. Lamberth Road and Johnston Road).

8.1.2 Industrial

Goondiwindi appears to have ample zoned land to meet demand for both large and small industrial lots over the next 20 years. However, our analysis of past vacant land sales and take-up, coupled with observations and feedback gleaned from business owners, key landowners and other stakeholders in Goondiwindi's commercial and industrial markets, suggests this 'adequacy' of supply is not without some constraints, as noted earlier in this report.

Smaller, market-ready industrial lots

Goondiwindi is a small market. Population growth has been modest over the past decade or so, and is expected to continue at modest levels to 2031 (less than 1% increase *per annum* under both medium and high series projections). Demand for vacant industrial land is likewise modest and, historically, actual take-up has probably only averaged about one hectare *per annum* or less. It is not economically practical for owners to subdivide available large parcels (e.g., ten to 170 hectares) to create and service a few smaller lots of 2,000-4,000m² at a time, as demand can be sporadic and for perhaps only one or two lots a year. Site fill (if needed), on-site firefighting requirements and other development costs associated with unserviced land further constrain market action.

Thus, despite an apparent large supply of vacant industrial land (over 300ha), the supply of market-ready land (i.e. subdivided and serviced) is limited, which constrains Goondiwindi's ability to attract new businesses. While there is no clear evidence from our discussions that the town is experiencing significant 'turn-away' of potential employment generating business opportunities because of a lack of suitable sites, the small size and slow movement of Goondiwindi's industrial market suggests that it cannot afford to let any reasonable employment-generating opportunity slip away.

Half of Goondiwindi's industrial businesses are located on lots of less than 4,000m², and another quarter occupy lots of up to a hectare. Most future industrial demand is likely to be generated by firms requiring *serviced* lots within this range.

Potential solutions in overcoming this 'chicken and egg' situation to ensure a better market ready supply of smaller, serviced lots could include:

- Council use part of its 160ha aerodrome land holdings to develop a small industrial estate offering smaller serviced lots of 2,000-4,000m². Council can take a longer term view of its investment than most private sector land owners and developers, given large upfront costs and low levels of market activity. This area need not be large (even five hectares could make a difference) nor should it seek to displace or compete with future private sector initiatives.
- Council and owners of key land parcels work towards some form of public-private partnership to advance the subdivision and servicing of at least parts of key landholdings by extending services—mainly reticulated water. Sites along Boundary Road, Cemetery Road or sites with potential access from the Barwon or Cunningham Highway are possibilities. Cost-sharing or

cost-deferral, fast-tracking of approvals, and 'as of right' uses were some of the suggestions made towards this end.

- Ironically, another potential solution to increasing market-ready supply of smaller lots would be to rezone additional land. Council might consider rezoning some additional land in strategic locations (for example, near the intersection of Boundary Road and the Cunningham Highway) if its owners are capable and committed to working with Council to subdivide and service this land to increase the market ready supply of smaller lots.

Location

The bulk of the Township's occupied and vacant industry land is primarily located along a more than four kilometer stretch of Boundary Road. A large portion of it adjoins land zoned for Low Density Residential, Mixed Use and Urban purposes. The town's industrial land needs to be protected from encroachment by other incompatible land uses, such as residential.

Provided all or most of the current zoned industrial land can be preserved, there should be no need for Council to provide for additional industrial land outside of the Boundary Road corridor area over the forecast period.

8.2 FUTURE COMMERCIAL AND INDUSTRIAL OPPORTUNITIES

Our investigations of Goondiwindi's commercial and industrial structure, together with the outcomes of business and stakeholder discussions, suggest that its future employment opportunities are unlikely to deviate markedly from its present economic focus and mix of activities, which are strongly tied to primary production.

8.2.1 Commercial opportunities

Future commercial and retail employment generating opportunities are likely to be incremental, as these are largely driven by population growth.

Ageing of the population and workforce over the next 20 years is likely to constrain opportunities for significant new commercial and retail development. However, demand and opportunities for employment in aged care and allied health services should increase. Retirement housing, nursing homes and in-home care and services should create new jobs, but these jobs are unlikely to stimulate demand for additional office or retail floorspace or commercial zoned land.

Nevertheless, even should Goondiwindi's future population exceed that projected for the region (presumably with an influx of younger residents) the town centre's potential for redevelopment should enable it to accommodate significant additional commercial office-type development. This could include encouraging more two storey development.

Future major retail – opportunity or opportunistic?

Although Goondiwindi's projected catchment population growth does not warrant a third large supermarket, or even a small format discount department store, this may not deter prospective major retailers in the future, particularly as the major chain stores continue to seek market opportunities in seemingly ever smaller provincial cities and towns.

For example should a competitive supermarket (e.g. Woolworths) perceive that the two existing supermarkets are not adequately servicing the Goondiwindi market—through failure to periodically invest and update their stores and service, poor management or generally failing to meet customer expectations—it may seek to fill a perceived market gap and even community need. Healthy competition among traders is almost always in the community interest.

However, should a supermarket or discount department store be permitted to locate outside the town centre area, such as in the Highway Commercial precinct or elsewhere, their impacts upon the overall vitality and viability of Goondiwindi's core or main street retail precinct would be severe and long-lasting. These stores are major customer trip generators and would divert a substantial amount of customer traffic and spending away from the town centre. Projected growth in population and retail spending is simply too low to ameliorate such impacts upon the town centre.

Consequently, should a discount department store or third major supermarket seek to establish in Goondiwindi, they should be located within the town centre's commercial area. This might be accomplished through site amalgamation and redevelopment or simply by replacement of one of the existing supermarkets (or other large store) with a larger and more modern one. If this is not possible within the existing commercial area, a site immediately adjoining the main retail area could be considered, as long as it can form a contiguous and continuous part of the town centre.

8.2.2 Industrial opportunities

Goondiwindi's economic base and industry structure is strongly tied to agriculture, warehousing and transport, with some manufacturing, and this relative mix is unlikely to change significantly over the next 20 years. The town is mature and well-established, with no obvious market gaps in its industrial profile.

Future sources of employment generating industrial activities and industrial land generally comes from new market entrants, internal growth, business relocation and displacement and mergers and business consolidation. The first two are most likely to be relevance to Goondiwindi's future industrial (and some commercial) prospects for employment growth.

New market entrants

New market entrants can consist of major existing national and multi-national firms to large and small start-up firms.

Securing national or multi-national firms represent highly desirable additions to a community as they can widen the horizon of industrial and other economic activity with respect to skills and training, market reach and capital investment. However, at any one time, only a small number of such firms might be actively seeking a new location and competition among local governments and developers to secure these new market entrants can be fierce. Consequently, these firms are often in a position to extract highly competitive rents or tax or other concessions from governments.

Larger start-up firms, often backed by significant private capital or government support, are also keenly sought by local government authorities, for much the same reasons. They are also quite uncommon and often carry a higher risk of failure.

Goondiwindi's main opportunities for new market entrants are likely to be among smaller start up firms. They usually seek cheaper premises in established industrial areas rather than new industrial estates or sites. These firms might initially require only a few hundred square metres however as they grow they then move to larger premises, either as tenants or owner-occupiers. Goondiwindi's Mixed Use zone is a potential incubator for small start-up firms.

There are major employment and investment benefits to be had from attracting major new market entrants and larger start-up firms to smaller towns. However, the process of attracting these firms is arduous and usually involves a lengthy courting and liaison between a local government agency, and/or a developer and the firm itself. Much time and resources are often devoted to this process to promote the State, region and then the city or town as a suitable and desirable location for the targeted firm with limited chances of success.

Internal Growth

Another source of demand comes from existing firms that are in the process or are thinking of expanding in the future. Encouraging 'internal growth' is a far more certain strategy from a local government's point of view in terms of generating employment and demand for industrial land. Although lacking the immediate economic boost brought by a major new market entrant, growth in employment and economic benefits generated through the expansion of existing firms is generally a much more successful, but longer term strategy. Small businesses create many more jobs than big businesses.

Several of the Goondiwindi Township firms we have spoken with indicated that they have plans to expand in the next few years, although all indicated that they also have the capacity to so on their present site or premises. Others may also have future expansion plans, and not all will be able to accomplish this in their current premises.

Small scale manufacturing, mainly related to agri-business, but also niche or specialist products and parts, are found in numerous non-metropolitan cities and towns, and represent a future opportunity for Goondiwindi. While some such businesses are there through historical accident, many purposely establish in smaller places for lifestyle reasons. For example, in Foresight Partners' investigations of industrial activities in the Wide Bay Burnett and Gympie regions, we found a number of businesses such as specialised welding services, avionics, diesel repairs and even ice-making had purposely eschewed large towns/cities in favour of smaller towns for a desired lifestyle for themselves and their families.

8.3 FOSTERING FUTURE OPPORTUNITIES

Rural towns such as Goondiwindi generally do not have the population base, depth of skills and proximity to major transport infrastructure (airports and ports) to compete for many employment-generating commercial and industrial employment activities. Generating and keeping industrial and commercial firms alive and well in smaller cities and towns is an on-going battle that is neither new nor specific to Goondiwindi. Goondiwindi in fact appears to have done well compared with many other (non-mining/energy-based) rural towns.

Work undertaken on behalf of the NSW Country Mayors' Association and published as *A Strategy for Balanced State Development* (1993) noted that, in securing future employment and economic opportunities, smaller towns had their own unique advantages over metropolitan areas, such as (page 119):

- *'Present the smallness of the town as an asset. They are simpler, safer worlds. Life is more personal, people are more interdependent and are held accountable for their actions. Leaders in small towns lack economies of scale but gain in economies of scope: fewer people know more about what is going on. There is less impersonal bureaucratic behaviour and it is generally easier to get things done.'* One of Goondiwindi's primary assets is the quality of life it can offer, in terms of better/less expensive housing, good schools, medical facilities, community facilities, recreational opportunities and other attributes within a small town setting. Goondiwindi is perceived as a 'solid' and stable place.
- *'Rely more on civic leadership rather than government leadership. It is often the efforts and tenacity of a few 'movers and shakers', with the backing of the community, that gets things done.'* Local government can establish overall direction, but it is the local community and business sector that ultimately identifies the potential for value adding industries and opportunities.
- *'Develop a mix of economic development strategies. Thoroughly searching one's own backyard for new entrepreneurial opportunities and value-adding to existing businesses (gardening) is often more productive (but perhaps less glamorous) than attempts to recruit outside companies.'* Fostering internal growth of Goondiwindi's existing firms should be paramount in Council's economic development planning.

- *'Think globally, act locally' is more than a cliché. Rural firms can now trade directly in global market networks. Location and hierarchies are far less important in the new economy than they were in the industrial age.'* Although this advice is more than 15 years old, it is still relevant, and a few of Goondiwindi's (mainly agri-business) manufacturers have indeed tapped into national and international markets. Goondiwindi's broadband connections with the world are increasingly just as important as its national highway connections.

Governments, whether local, state or even national, are notoriously poor at 'picking winners' among industrial and commercial enterprises and most wisely leave this to the private sector. However, this does not mean Council has only a minor role. It needs to maintain a proactive and business-friendly, rather than simply a regulatory, approach to new private sector ventures and ideas.

Ideas for new business opportunities, or improvements in existing business operations in smaller towns almost always arise from the creativity, experience and knowledge of its own citizens and entrepreneurs, rather than governments (or outside consultants). Not all can or will be successful. Council can best foster future commercial and industrial opportunities for Goondiwindi by ensuring its planning and approval processes are efficient, speedy and provide certainty.

Although it must operate, as with all Queensland Councils, within a State planning framework, Councils with efficient planning and approval processes can have a competitive advantage over less efficient ones. This is particularly important in retaining existing businesses seeking to grow, as well as attracting new businesses from outside the Goondiwindi region. Council can assist existing firms grow internally by easing bureaucratic burdens, facilitate networking opportunities through its State and Commonwealth contacts and the Border Rivers Chamber of Commerce, and ensure suitable land and infrastructure is in place to capture opportunities as they arise.

As indicated earlier, this might include establishing a small serviced industrial lots on its aerodrome land, or working with motivated and capable land owners to share the risks (and rewards) in creating some smaller, serviced industrial lots to ensure such opportunities are not lost when they do arise.

Abbreviations

ABS	Australian Bureau of Statistics
ANZSIC	Australian and New Zealand Standard Industry Classification
DA	Development Application
DBIRD	Department of Business, Industry and Regional Development
GFA	Gross Floor Area
GRC	Goondiwindi Regional Council
LGA	Local Government Area
MCU	Material Change of Use
PIFU	Planning Information and Forecasting Unit
SD	Statistical Division
SKU	Stock-keeping units
UCL	Urban Centre Locality

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APPENDIX A –DEMOGRAPHIC CHARACTERISTICS

Table A.1: Age characteristics of catchment, 2006

Table A.2: Dwelling structure, 2006

Table A.3: Dwelling tenure, 2006

Table A.4: Average household income (2009 \$ values), 2006

Table A.5: Labour force status, 2006

Table A.6: Occupation of the labour force, 2006

Table A.7: Number of vehicles per household, 2006

Table A.8: Industry of the labour force, 2006

Table A.9: Schooling and education, 2006

Table A.10: Birthplace and language spoken at home, 2006

Table A.11: Family structure, 2006

Table A.12: Mortgages, 2006

Table A.13: Rental Costs, 2006

Table A.1: Age characteristics, 2006

Age	Goondiwindi Township (%)	Remainder of GRC (%)	Total GRC (%)	Northern NSW (%)	Total Catchment (%)	Darling Downs SD (%)	Brisbane SD (%)	Queensland (%)
0-14	23.7	23.2	23.5	30.2	24.6	22.1	20.3	20.7
15-24	12.4	7.5	10.2	12.4	10.6	13.5	14.9	13.8
25-34	15.3	11.1	13.4	11.5	13.1	11.5	14.6	13.4
35-44	14.1	14.6	14.3	14.8	14.4	13.5	15.1	14.7
45-54	13.2	15.8	14.4	13.9	14.3	13.5	13.5	13.8
55-64	9.5	12.2	10.7	11.1	10.8	11.5	10.5	11.2
65-74	7.0	9.5	8.1	4.2	7.5	7.7	5.8	6.6
75-84	3.7	5.3	4.4	1.7	4.0	4.9	4.0	4.3
85+	1.2	0.7	1.0	0.1	0.8	1.8	1.4	1.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.2: Dwelling structure, 2006

Structure	Goondiwindi Township (%)	Remainder of GRC (%)	Total GRC (%)	Northern NSW (%)	Total Catchment (%)	Darling Downs SD (%)	Brisbane SD (%)	Queensland (%)
Separate house	77.9	95.5	86.0	96.2	87.6	87.4	80.0	79.6
Semi-detached	2.1	1.0	1.5	0.9	1.4	4.0	7.3	7.6
Flat/unit	17.5	1.4	10.0	0.9	8.6	7.5	11.8	11.2
Other structure	2.6	2.2	2.4	2.0	2.4	1.1	0.9	1.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.3: Dwelling tenure, 2006

<i>Tenure</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
Fully owned	28.4	46.4	36.7	35.1	36.5	38.1	30.4	32.5
Purchasing	33.6	18.6	26.7	12.5	24.6	31.7	37.2	34.7
Renting	37.4	32.8	35.2	49.2	37.3	29.3	31.7	31.9
Other tenure	0.6	2.2	1.4	3.2	1.7	0.9	0.7	0.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.4: Average household income (2009 \$ values), 2006

<i>Income (\$)</i>	<i>Goondiwindi Township No.</i>	<i>Remainder of GRC No.</i>	<i>Total GRC No.</i>	<i>Northern NSW No.</i>	<i>Total Catchment No.</i>	<i>Darling Downs SD No.</i>	<i>Brisbane SD No.</i>	<i>Queensland No.</i>
Negative/Nil income	1.3	2.8	2.0	4.3	2.3	1.2	1.1	1.2
\$1-\$149	1.6	2.6	2.0	2.6	2.1	1.6	1.2	1.3
\$150-\$249	5.6	6.9	6.2	6.1	6.2	5.9	4.3	5.0
\$250-\$349	7.8	8.9	8.3	6.9	8.1	9.2	6.8	7.6
\$350-\$499	3.4	6.8	5.0	7.8	5.4	6.8	4.3	5.5
\$500-\$649	11.5	15.4	13.3	16.9	13.8	13.9	10.3	11.9
\$650-\$799	7.9	10.7	9.2	11.7	9.5	8.2	7.0	7.3
\$800-\$999	8.0	9.4	8.7	5.2	8.2	8.3	7.9	8.0
\$1,000-\$1,199	16.4	13.1	14.9	13.0	14.6	14.0	12.8	13.1
\$1,200-\$1,399	8.4	6.1	7.3	4.8	7.0	7.2	6.9	6.9
\$1,400-\$1,699	10.6	4.6	7.8	6.7	7.6	7.5	9.5	8.7
\$1,700-\$1,999	5.0	4.7	4.8	3.3	4.6	5.7	7.7	6.9
\$2,000-\$2,499	7.1	4.4	5.8	3.3	5.5	5.1	8.1	6.9
\$2,500-\$2,999	3.1	2.0	2.6	4.1	2.8	3.1	6.4	5.2
\$3,000 or more	2.4	1.6	2.0	3.3	2.2	2.3	5.7	4.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Income Not Stated	12.2	13.1	12.6	16.7	13.2	11.3	10.6	11.4
Average household income (2009 \$ values)	\$64,723	\$52,902	\$59,269	\$56,022	\$58,799	\$59,683	\$75,316	\$69,243

Source: ABS Census Tables 2006

Table A.5: Labour force status, 2006

<i>Labour force status</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
In labour force	72.5	68.2	70.6	63.7	69.5	64.3	68.3	66.3
Not in labour force	27.5	31.8	29.4	36.3	30.5	35.7	31.7	33.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
<i>Of those in labour force</i>								
Employed	95.8	97.3	96.4	93.8	96.1	95.5	95.6	95.3
Unemployed	4.2	2.7	3.6	6.2	3.9	4.5	4.4	4.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Employed - full time	69.5	75.1	72.0	70.8	71.8	69.4	69.7	69.0
Employed - part time	30.5	24.9	28.0	29.2	28.2	30.6	30.3	31.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Persons employed per household	1.4	1.3	1.3	1.2	1.3	1.3	1.4	1.3

Source: ABS Census Tables 2006

Table A.6: Occupation of the labour force, 2006

<i>Occupation</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
Managers	14.7	39.2	25.5	43.0	28.0	16.7	11.5	12.6
Professionals	12.5	6.0	9.6	7.3	9.3	14.5	21.0	17.5
Technicians & trades workers	15.9	8.1	12.5	6.1	11.6	14.8	14.3	15.6
Community & personal service workers	7.9	6.1	7.1	7.2	7.1	8.6	8.9	9.3
Clerical & administrative workers	13.2	8.7	11.2	5.2	10.4	12.8	16.9	15.0
Sales workers	11.0	4.2	8.0	3.8	7.4	9.4	10.4	10.5
Machinery operators & drivers	10.9	9.7	10.4	8.2	10.1	7.7	6.6	7.4
Labourers	13.9	17.9	15.7	19.3	16.2	15.5	10.2	12.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Blue collar	40.8	35.7	38.6	33.5	37.8	38.0	31.2	35.1
White collar	59.2	64.3	61.4	66.5	62.2	62.0	68.8	64.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.7: Number of vehicles per household, 2006

<i>Vehicles</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
0	7.0	3.8	5.5	13.9	6.8	7.6	8.9	8.2
1	33.5	29.3	31.5	28.8	31.1	36.5	37.6	37.8
2	41.7	39.9	40.9	36.5	40.2	37.4	37.6	37.8
3	12.0	16.9	14.3	13.6	14.2	12.3	11.0	11.2
4	5.9	10.1	7.9	7.1	7.7	6.2	4.8	5.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.8: Industry of the labour force, 2006

<i>Industry</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
Agriculture, forestry and fishing	12.1	51.7	29.4	52.9	32.8	12.3	0.7	3.5
Mining	0.3	1.8	0.9	0.4	0.9	0.9	0.6	1.7
Manufacturing	4.8	3.9	4.4	2.8	4.2	10.9	11.2	10.1
Elec, Gas & Water Supply	0.6	0.5	0.6	0.4	0.5	1.0	1.0	1.0
Construction	10.1	2.7	6.8	2.8	6.3	7.6	8.3	9.3
Wholesale trade	3.9	2.3	3.2	0.8	2.8	3.8	4.7	4.1
Retail trade	16.6	6.2	12.0	5.3	11.1	11.9	11.5	12.0
Accomm & food services	7.3	3.7	5.7	4.2	5.5	5.5	6.0	7.2
Transport, postal and warehousing	6.4	3.5	5.1	3.4	4.9	4.6	5.7	5.2
Information, media & telecommunications	0.6	0.3	0.4	0.8	0.5	1.0	1.8	1.5
Finance and insurance	2.3	0.7	1.6	0.4	1.4	2.5	3.8	2.9
Rental, hiring & real estate services	1.9	0.6	1.4	1.1	1.3	1.3	2.1	2.1
Professional, scientific & technical services	4.3	2.0	3.3	1.9	3.1	3.5	7.6	5.8
Administrative & support services	1.1	0.6	0.9	1.5	1.0	1.8	3.4	3.1
Public administration & safety	5.5	4.0	4.8	2.7	4.5	6.7	7.3	6.9
Education & training	6.5	6.6	6.5	6.8	6.6	9.0	8.1	7.8
Health care & social assistance	8.5	7.1	7.9	5.2	7.5	11.0	11.1	10.5
Arts & recreation services	0.7	0.0	0.4	0.4	0.4	0.8	1.3	1.4
Other services	6.8	1.7	4.6	6.3	4.8	3.9	3.9	3.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.9: Schooling and education, 2006

<i>Education</i>	<i>Goondiwindi Township No.</i>	<i>Remainder of GRC No.</i>	<i>Total GRC No.</i>	<i>Northern NSW No.</i>	<i>Total Catchment No.</i>	<i>Darling Downs SD No.</i>	<i>Brisbane SD No.</i>	<i>Queensland No.</i>
Educational institution attending (% of all persons)								
Pre school	2.0	2.3	2.1	2.6	2.2	1.6	1.6	1.5
Infant/primary school	9.0	10.7	9.7	13.1	10.3	9.8	8.7	8.9
Secondary school	5.0	3.5	4.3	4.8	4.4	6.7	6.1	6.1
TAFE	1.2	0.9	1.1	1.0	1.0	1.7	1.9	1.7
University/other Tertiary	0.7	0.6	0.6	0.6	0.6	3.0	4.9	3.5
Other	0.6	0.4	0.5	0.3	0.5	0.5	0.6	0.6
Proportion of Total Persons	18.5	18.3	18.4	22.4	19.1	23.2	23.7	22.3
Tertiary qualification gained (% of persons aged 20+)								
Postgraduate Degree	0.6	0.7	0.7	0.2	0.6	1.4	3.2	2.1
Grad Dip & Assoc Dip	1.2	0.6	0.9	1.0	0.9	1.2	1.6	1.3
Bachelor Degree	8.3	6.9	7.7	6.5	7.5	8.8	14.0	10.9
Proportion of Persons Aged 20+	10.1	8.2	9.2	7.7	9.0	11.4	18.8	14.4
Other qualification gained (% of persons aged 15+)								
Advanced Diploma and Diploma	4.2	5.1	4.6	6.2	4.9	5.7	7.3	6.6
Certificate	16.7	14.0	15.5	11.9	14.9	16.9	16.5	17.9
Proportion of Persons Aged 15+	20.9	19.1	20.1	18.1	19.8	22.6	23.8	24.5

Source: ABS Census Tables 2006

Table A.10: Birthplace and language spoken at home, 2006

<i>Birthplace/language</i>	<i>Goondiwindi Township No.</i>	<i>Remainder of GRC No.</i>	<i>Total GRC No.</i>	<i>Northern NSW No.</i>	<i>Total Catchment No.</i>	<i>Darling Downs SD No.</i>	<i>Brisbane SD No.</i>	<i>Queensland No.</i>
Birthplace								
Australia	96.1	94.8	95.5	96.8	95.7	91.3	76.8	80.8
New Zealand	0.9	1.0	0.9	0.5	0.9	1.3	4.4	4.1
North America	0.1	0.2	0.1	0.4	0.2	0.3	0.6	0.5
United Kingdom/Ireland	1.1	1.6	1.3	1.3	1.3	2.8	6.0	5.5
South Africa	0.4	0.3	0.4	0.0	0.3	0.3	0.8	0.6
Other Europe	0.3	1.0	0.6	0.3	0.6	1.1	2.2	2.0
Asia	0.3	0.4	0.3	0.6	0.4	1.2	4.6	3.1
Other	0.8	0.8	0.8	0.2	0.7	1.7	4.5	3.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Main language spoken at home								
English only	98.7	98.2	98.4	99.4	98.6	96.8	88.6	91.8
Other	1.3	1.8	1.6	0.6	1.4	3.2	11.4	8.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.11: Family structure, 2006

<i>Family structure</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
Couple family households								
with children under 15 years	20.4	21.7	21.0	26.7	21.9	18.2	18.1	17.8
with dependent students (15 - 24 years)	2.2	1.6	1.9	2.0	2.0	3.0	4.2	3.5
with children under 15 and dependent students	3.3	3.2	3.3	2.5	3.1	3.9	3.8	3.7
with non dependent children	5.9	6.7	6.3	6.0	6.2	6.3	6.9	6.6
Total couple family households	31.8	33.2	32.5	37.2	33.2	31.4	33.0	31.5
Couple without children	29.1	32.2	30.5	20.1	28.9	29.8	26.5	28.5
One parent family households								
with children under 15 years	4.8	3.0	3.9	10.8	5.0	5.2	5.2	5.5
with dependent students (15 - 24 years)	0.8	0.4	0.6	0.4	0.6	1.0	1.4	1.3
with children under 15 and dependent students	0.2	0.2	0.2	0.6	0.2	0.8	0.9	0.9
with non dependent children	3.7	2.6	3.2	3.2	3.2	3.3	4.1	3.9
Total one parent family households	9.5	6.2	7.9	15.0	9.0	10.3	11.7	11.6
Other family households	1.5	0.6	1.1	2.3	1.3	1.1	1.5	1.2
Lone person households	24.1	26.0	25.0	21.3	24.4	24.2	22.3	22.8
Group households	4.0	1.8	3.0	4.0	3.2	3.3	5.0	4.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: ABS Census Tables 2006

Table A.12: Mortgages, 2006

<i>Monthly Mortgage</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
\$1-\$249	1.9	7.8	3.6	16.3	4.3	3.2	2.5	2.6
\$250-\$399	1.9	13.4	5.2	22.4	6.2	3.9	2.2	2.6
\$400-\$549	3.8	15.1	7.0	28.6	8.3	8.5	4.8	5.7
\$550-\$749	8.3	10.8	9.0	24.5	9.9	12.6	6.9	8.2
\$750-\$949	19.1	11.2	16.8	-	15.9	15.6	10.0	11.2
\$950-\$1,199	19.6	17.2	18.9	-	17.8	17.6	14.1	14.7
\$1,200-\$1,399	15.4	8.2	13.3	8.2	13.1	12.1	12.3	12.2
\$1,400-\$1,599	9.4	3.9	7.8	-	7.3	7.7	9.8	9.2
\$1,600-\$1,999	10.2	2.6	8.0	-	7.6	9.3	15.6	14.1
\$2,000-\$2,999	6.8	3.0	5.7	-	5.4	6.9	16.0	14.1
\$3,000+	3.6	6.9	4.6	-	4.3	2.7	5.9	5.3
Total Dwellings Being Purchased	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Excludes Not Stated

Source: ABS Census Tables 2006

Table A.13: Rental Costs, 2006

<i>Weekly Rent</i>	<i>Goondiwindi Township (%)</i>	<i>Remainder of GRC (%)</i>	<i>Total GRC (%)</i>	<i>Northern NSW (%)</i>	<i>Total Catchment (%)</i>	<i>Darling Downs SD (%)</i>	<i>Brisbane SD (%)</i>	<i>Queensland (%)</i>
\$0-\$49	6.2	49.1	24.1	53.4	29.4	9.8	2.6	5.6
\$50-\$99	17.2	15.8	16.7	21.8	17.6	10.3	7.3	8.6
\$100-\$139	16.8	24.5	20.0	20.2	20.1	20.0	7.8	10.4
\$140-\$179	21.3	5.7	14.8	1.5	12.4	24.0	12.6	14.4
\$180-\$224	25.1	2.6	15.7	0.0	12.9	20.6	20.6	18.9
\$225-\$274	6.8	0.0	4.0	1.1	3.5	10.1	24.4	19.6
\$275-\$349	4.8	0.0	2.8	0.0	2.3	3.8	15.9	14.6
\$350-\$449	0.0	0.0	0.0	0.0	0.0	0.6	5.8	5.3
\$450-\$549	0.4	0.0	0.3	0.0	0.2	0.2	1.5	1.3
\$550+	1.3	2.2	1.7	1.9	1.7	0.7	1.4	1.3
Total Weekly Rent	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Excludes Not Stateds

Source: ABS Census Tables 2006

APPENDIX B – ANZSIC CODES

ANZSIC 2006 Division, Subdivision and Group Codes and Titles

A Agriculture, Forestry and Fishing

- 01 *Agriculture*
 - 011 Nursery and Floriculture Production
 - 012 Mushroom and Vegetable Growing
 - 013 Fruit and Tree Nut Growing
 - 014 Sheep, Beef Cattle and Grain Farming
 - 015 Other Crop Growing
 - 016 Dairy Cattle Farming
 - 017 Poultry Farming
 - 018 Deer Farming
 - 019 Other Livestock Farming
- 02 *Aquaculture*
 - 020 Aquaculture
- 03 *Forestry and Logging*
 - 030 Forestry and Logging
- 04 *Fishing, Hunting and Trapping*
 - 041 Fishing
 - 042 Hunting and Trapping
- 05 *Agriculture, Forestry and Fishing Support Services*
 - 051 Forestry Support Services
 - 052 Agriculture and Fishing Support Services

B Mining

- 06 *Coal Mining*
 - 060 Coal Mining
- 07 *Oil and Gas Extraction*
 - 070 Oil and Gas Extraction
- 08 *Metal Ore Mining*
 - 080 Metal Ore Mining
- 09 *Non-Metallic Mineral Mining and Quarrying*
 - 091 Construction Material Mining
 - 099 Other Non-Metallic Mineral Mining and Quarrying
- 10 *Exploration and Other Mining Support Services*
 - 101 Exploration
 - 109 Other Mining Support Services

C Manufacturing

- 11 *Food Product Manufacturing*
 - 111 Meat and Meat Product Manufacturing
 - 112 Seafood Processing
 - 113 Dairy Product Manufacturing
 - 114 Fruit and Vegetable Processing
 - 115 Oil and Fat Manufacturing
 - 116 Grain Mill and Cereal Product Manufacturing
 - 117 Bakery Product Manufacturing
 - 118 Sugar and Confectionery Manufacturing
 - 119 Other Food Product Manufacturing
- 12 *Beverage and Tobacco Product Manufacturing*
 - 121 Beverage Manufacturing
 - 122 Cigarette and Tobacco Product Manufacturing
- 13 *Textile, Leather, Clothing and Footwear Manufacturing*
 - 131 Textile Manufacturing
 - 132 Leather Tanning, Fur Dressing and Leather Product Manufacturing
 - 133 Textile Product Manufacturing

- 134 Knitted Product Manufacturing
- 135 Clothing and Footwear Manufacturing
- 14 ***Wood Product Manufacturing***
 - 141 Log Sawmilling and Timber Dressing
 - 149 Other Wood Product Manufacturing
- 15 ***Pulp, Paper and Converted Paper Product Manufacturing***
 - 151 Pulp, Paper and Paperboard Manufacturing
 - 152 Converted Paper Product Manufacturing
- 16 ***Printing (including the Reproduction of Recorded Media)***
 - 161 Printing and Printing Support Services
 - 162 Reproduction of Recorded Media
- 17 ***Petroleum and Coal Product Manufacturing***
 - 170 Petroleum and Coal Product Manufacturing
- 18 ***Basic Chemical and Chemical Product Manufacturing***
 - 181 Basic Chemical Manufacturing
 - 182 Basic Polymer Manufacturing
 - 183 Fertiliser and Pesticide Manufacturing
 - 184 Pharmaceutical and Medicinal Product Manufacturing
 - 185 Cleaning Compound and Toiletry Preparation Manufacturing
 - 189 Other Basic Chemical Product Manufacturing
- 19 ***Polymer Product and Rubber Product Manufacturing***
 - 191 Polymer Product Manufacturing
 - 192 Natural Rubber Product Manufacturing
- 20 ***Non-Metallic Mineral Product Manufacturing***
 - 201 Glass and Glass Product Manufacturing
 - 202 Ceramic Product Manufacturing
 - 203 Cement, Lime, Plaster and Concrete Product Manufacturing
 - 209 Other Non-Metallic Mineral Product Manufacturing
- 21 ***Primary Metal and Metal Product Manufacturing***
 - 211 Basic Ferrous Metal Manufacturing
 - 212 Basic Ferrous Metal Product Manufacturing
 - 213 Basic Non-Ferrous Metal Manufacturing
 - 214 Basic Non-Ferrous Metal Product Manufacturing
- 22 ***Fabricated Metal Product Manufacturing***
 - 221 Iron and Steel Forging
 - 222 Structural Metal Product Manufacturing
 - 223 Metal Container Manufacturing
 - 224 Sheet Metal Product Manufacturing (except Metal Structural and Container Products)
 - 229 Other Fabricated Metal Product Manufacturing
- 23 ***Transport Equipment Manufacturing***
 - 231 Motor Vehicle and Motor Vehicle Part Manufacturing
 - 239 Other Transport Equipment Manufacturing
- 24 ***Machinery and Equipment Manufacturing***
 - 241 Professional and Scientific Equipment Manufacturing
 - 242 Computer and Electronic Equipment Manufacturing
 - 243 Electrical Equipment Manufacturing
 - 244 Domestic Appliance Manufacturing
 - 245 Pump, Compressor, Heating and Ventilation Equipment Manufacturing
 - 246 Specialised Machinery and Equipment Manufacturing
 - 249 Other Machinery and Equipment Manufacturing
- 25 ***Furniture and Other Manufacturing***
 - 251 Furniture Manufacturing
 - 259 Other Manufacturing

D Electricity, Gas, Water and Waste Services

- 26 ***Electricity Supply***
 - 261 Electricity Generation
 - 262 Electricity Transmission
 - 263 Electricity Distribution

- 264 On Selling Electricity and Electricity Market Operation
- 27 *Gas Supply*
 - 270 Gas Supply
- 28 *Water Supply, Sewerage and Drainage Services*
 - 281 Water Supply, Sewerage and Drainage Services
- 29 *Waste Collection, Treatment and Disposal Services*
 - 291 Waste Collection Services
 - 292 Waste Treatment, Disposal and Remediation Services

E Construction

- 30 *Building Construction*
 - 301 Residential Building Construction
 - 302 Non-Residential Building Construction
- 31 *Heavy and Civil Engineering Construction*
 - 310 Heavy and Civil Engineering Construction
- 32 *Construction Services*
 - 321 Land Development and Site Preparation Services
 - 322 Building Structure Services
 - 323 Building Installation Services
 - 324 Building Completion Services
 - 329 Other Construction Services

F Wholesale Trade

- 33 *Basic Material Wholesaling*
 - 331 Agricultural Product Wholesaling
 - 332 Mineral, Metal and Chemical Wholesaling
 - 333 Timber and Hardware Goods Wholesaling
- 34 *Machinery and Equipment Wholesaling*
 - 341 Specialised Industrial Machinery and Equipment Wholesaling
 - 349 Other Machinery and Equipment Wholesaling
- 35 *Motor Vehicle and Motor Vehicle Parts Wholesaling*
 - 350 Motor Vehicle and Motor Vehicle Parts Wholesaling
- 36 *Grocery, Liquor and Tobacco Product Wholesaling*
 - 360 Grocery, Liquor and Tobacco Product Wholesaling
- 37 *Other Goods Wholesaling*
 - 371 Textile, Clothing and Footwear Wholesaling
 - 372 Pharmaceutical and Toiletry Goods Wholesaling
 - 373 Furniture, Floor Covering and Other Goods Wholesaling
- 38 *Commission-Based Wholesaling*
 - 380 Commission-Based Wholesaling

G Retail Trade

- 39 *Motor Vehicle and Motor Vehicle Parts Retailing*
 - 391 Motor Vehicle Retailing
 - 392 Motor Vehicle Parts and Tyre Retailing
- 40 *Fuel Retailing*
 - 400 Fuel Retailing
- 41 *Food Retailing*
 - 411 Supermarket and Grocery Stores
 - 412 Specialised Food Retailing
- 42 *Other Store-Based Retailing*
 - 421 Furniture, Floor Coverings, Houseware and Textile Goods Retailing
 - 422 Electrical and Electronic Goods Retailing
 - 423 Hardware, Building and Garden Supplies Retailing
 - 424 Recreational Goods Retailing
 - 425 Clothing, Footwear and Personal Accessory Retailing
 - 426 Department Stores
 - 427 Pharmaceutical and Other Store-Based Retailing
- 43 *Non-Store Retailing and Retail Commission-Based Buying and/or Selling*

- 431 Non-Store Retailing
- 432 Retail Commission-Based Buying and/or Selling

H Accommodation and Food Services

- 44 *Accommodation*
 - 440 Accommodation
- 45 *Food and Beverage Services*
 - 451 Cafes, Restaurants and Takeaway Food Services
 - 452 Pubs, Taverns and Bars
 - 453 Clubs (Hospitality)

I Transport, Postal and Warehousing

- 46 *Road Transport*
 - 461 Road Freight Transport
 - 462 Road Passenger Transport
- 47 *Rail Transport*
 - 471 Rail Freight Transport
 - 472 Rail Passenger Transport
- 48 *Water Transport*
 - 481 Water Freight Transport
 - 482 Water Passenger Transport
- 49 *Air and Space Transport*
 - 490 Air and Space Transport
- 50 *Other Transport*
 - 501 Scenic and Sightseeing Transport
 - 502 Pipeline and Other Transport
- 51 *Postal and Courier Pick-up and Delivery Services*
 - 510 Postal and Courier Pick-up and Delivery Services
- 52 *Transport Support Services*
 - 521 Water Transport Support Services
 - 522 Airport Operations and Other Air Transport Support Services
 - 529 Other Transport Support Services
- 53 *Warehousing and Storage Services*
 - 530 Warehousing and Storage Services

J Information Media and Telecommunications

- 54 *Publishing (except Internet and Music Publishing)*
 - 541 Newspaper, Periodical, Book and Directory Publishing
 - 542 Software Publishing
- 55 *Motion Picture and Sound Recording Activities*
 - 551 Motion Picture and Video Activities
 - 552 Sound Recording and Music Publishing
- 56 *Broadcasting (except Internet)*
 - 561 Radio Broadcasting
 - 562 Television Broadcasting
- 57 *Internet Publishing and Broadcasting*
 - 570 Internet Publishing and Broadcasting
- 58 *Telecommunications Services*
 - 580 Telecommunications Services
- 59 *Internet Service Providers, Web Search Portals and Data Processing Services*
 - 591 Internet Service Providers and Web Search Portals
 - 592 Data Processing, Web Hosting and Electronic Information Storage Services
- 60 *Library and Other Information Services*
 - 601 Libraries and Archives
 - 602 Other Information Services

K Financial and Insurance Services

- 62 *Finance*
 - 621 Central Banking
 - 622 Depository Financial Intermediation

- 623 Non-Depository Financing
- 624 Financial Asset Investing
- 63 *Insurance and Superannuation Funds*
 - 631 Life Insurance
 - 632 Health and General Insurance
 - 633 Superannuation Funds
- 64 *Auxiliary Finance and Insurance Services*
 - 641 Auxiliary Finance and Investment Services
 - 642 Auxiliary Insurance Services

L Rental, Hiring and Real Estate Services

- 66 *Rental and Hiring Services (except Real Estate)*
 - 661 Motor Vehicle and Transport Equipment Rental and Hiring
 - 662 Farm Animal and Bloodstock Leasing
 - 663 Other Goods and Equipment Rental and Hiring
 - 664 Non-Financial Intangible Assets (Except Copyrights) Leasing
- 67 *Property Operators and Real Estate Services*
 - 671 Property Operators
 - 672 Real Estate Services

M Professional, Scientific and Technical Services

- 69 *Professional, Scientific and Technical Services (Except Computer System Design and Related Services)*
 - 691 Scientific Research Services
 - 692 Architectural, Engineering and Technical Services
 - 693 Legal and Accounting Services
 - 694 Advertising Services
 - 695 Market Research and Statistical Services
 - 696 Management and Related Consulting Services
 - 697 Veterinary Services
 - 699 Other Professional, Scientific and Technical Services
- 70 *Computer System Design and Related Services*
 - 700 Computer System Design and Related Services

N Administrative and Support Services

- 72 *Administrative Services*
 - 721 Employment Services
 - 722 Travel Agency and Tour Arrangement Services
 - 729 Other Administrative Services
- 73 *Building Cleaning, Pest Control and Other Support Services*
 - 731 Building Cleaning, Pest Control and Gardening Services
 - 732 Packaging Services

O Public Administration and Safety

- 75 *Public Administration*
 - 751 Central Government Administration
 - 752 State Government Administration
 - 753 Local Government Administration
 - 754 Justice
 - 755 Government Representation
- 76 *Defence*
 - 760 Defence
- 77 *Public Order, Safety and Regulatory Services*
 - 771 Public Order and Safety Services
 - 772 Regulatory Services

P Education and Training

- 80 *Preschool and School Education*
 - 801 Preschool Education
 - 802 School Education

- 81 *Tertiary Education*
 - 810 Tertiary Education
- 82 *Adult, Community and Other Education*
 - 821 Adult, Community and Other Education
 - 822 Educational Support Services

Q Health Care and Social Assistance

- 84 *Hospitals*
 - 840 Hospitals
- 85 *Medical and Other Health Care Services*
 - 851 Medical Services
 - 852 Pathology and Diagnostic Imaging Services
 - 853 Allied Health Services
 - 859 Other Health Care Services
- 86 *Residential Care Services*
 - 860 Residential Care Services
- 87 *Social Assistance Services*
 - 871 Child Care Services
 - 879 Other Social Assistance Services

R Arts and Recreation Services

- 89 *Heritage Activities*
 - 891 Museum Operation
 - 892 Parks and Gardens Operations
- 90 *Creative and Performing Arts Activities*
 - 900 Creative and Performing Arts Activities
- 91 *Sports and Recreation Activities*
 - 911 Sports and Physical Recreation Activities
 - 912 Horse and Dog Racing Activities
 - 913 Amusement and Other Recreation Activities
- 92 *Gambling Activities*
 - 920 Gambling Activities

S Other Services

- 94 *Repair and Maintenance*
 - 941 Automotive Repair and Maintenance
 - 942 Machinery and Equipment Repair and Maintenance
 - 949 Other Repair and Maintenance
- 95 *Personal and Other Services*
 - 951 Personal Care Services
 - 952 Funeral, Crematorium and Cemetery Services
 - 953 Other Personal Services
 - 954 Religious Services
 - 955 Civic, Professional and Other Interest Group Services
- 96 *Private Households Employing Staff and Undifferentiated Goods- and Service-Producing Activities of Households for Own Use*
 - 960 Private Households Employing Staff and Undifferentiated Goods- and Service-Producing Activities of Households for Own Use

Source: Australian Bureau of Statistics and Statistics New Zealand (2006), 'Australian and New Zealand Standard Industrial Classification 2006', ABS Cat no 1292.0.

APPENDIX C – RETAIL AND COMMERCIAL INVENTORY

Table C1: Goondiwindi retail and commercial inventory by third level ANZSIC, August 2010*

<i>ANZSIC Code</i>	<i>Industry Classification</i>	<i>Businesses (no.)</i>	<i>Estimated GFA (m²)</i>
A	Agriculture, Forestry and Fishing	1	350
052	Agriculture and Fishing Support Services	1	350
E	Construction	1	103
301	Residential Building Construction	1	103
F	Wholesale Trade	2	140
380	Commission-Based Wholesaling	2	140
G	Retail Trade	62	21,703
392	Motor Vehicle Parts and Tyre Retailing	3	890
411	Supermarket and Grocery Stores	4	4,910
412	Specialised Food Retailing	8	1,444
41	<i>Food Retailing</i>	12	6,354
421	Furniture, Floor Coverings, Houseware and Textile Goods Retailing	4	1,490
422	Electrical and Electronic Goods Retailing	4	770
423	Hardware, Building and Garden Supplies Retailing	4	3,500
424	Recreational Goods Retailing	5	1,515
425	Clothing, Footwear and Personal Accessory Retailing	12	2,294
426	Department Stores	1	1,165
427	Pharmaceutical and Other Store-Based Retailing	17	3,725
42	<i>Other Store-Based Retailing</i>	47	14,459
H	Accommodation and Food Services	12	1,350
451	Cafes, Restaurants and Takeaway Food Services	12	1,350
I	Transport, Postal and Warehousing	1	180
510	Postal and Courier Pick-up and Delivery Services	1	180
J	Information Media and Telecommunications	3	1,420
541	Newspaper, Periodical, Book & Directory Publishing	1	320
551	Motion Picture and Video Activities	1	900
601	Libraries and Archives	1	200
K	Financial and Insurance Services	10	2,065
622	Depository Financial Intermediation	8	1,665
641	Auxiliary Finance and Investment Services	2	400
L	Rental, Hiring and Real Estate Services	7	1,140
663	Goods and Equipment Rental and Hiring (other than vehicles and farm animals)	1	325
672	Real Estate Services	6	815

<i>ANZSIC Code</i>	<i>Industry Classification</i>	<i>Businesses (no.)</i>	<i>Estimated GFA (m²)</i>
M	Professional, Scientific and Technical Services	9	1,522
692	Architectural, Engineering and Technical Services	1	133
693	Legal and Accounting Services	4	860
696	Management and Related Consulting Services	1	135
697	Veterinary Services	1	200
699	Other Professional, Scientific and Technical Services	1	69
700	Computer System Design and Related Services	1	125
N	Administrative and Support Services	10	2,545
721	Employment Services	2	420
729	Other Administrative Services	7	2,055
72	<i>Total Administrative Services</i>	9	2,475
731	Building Cleaning, Pest Control and Gardening Services	1	70
O	Public Administration and Safety	6	1,805
752	State Government Administration	3	660
753	Local Government Administration	2	945
75	<i>Total Public Administration</i>	5	1,605
772	Regulatory Services	1	200
P	Education and Training	2	820
810	Tertiary Education	2	820
Q	Health Care and Social Assistance	15	2,815
851	Medical Services	3	670
852	Pathology and Diagnostic Imaging Services	2	235
853	Allied Health Services	6	1,050
85	<i>Total Medical and Other Health Care Services</i>	11	1,955
879	Social Assistance Services other than Child Care	4	860
87	<i>Total Social Assistance Services</i>	4	860
R	Arts and Recreation Services	1	150
891	Museum Operation	1	150
S	Other Services	12	966
949	Repair & Maintenance other than Automotive & Machinery	1	20
951	Personal Care Services	8	604
952	Funeral, Crematorium and Cemetery Services	1	120
953	Other Personal Services	2	222
95	<i>Total Personal and Other Services</i>	11	946
TOTAL		154	39,074

* Excludes motor vehicle retailing, fuel retailing, accommodation and child care businesses

Source: Foresight Partners estimates, August 2010

APPENDIX D – INDUSTRIAL INVENTORY

Table D1: Goondiwindi industrial inventory by third level ANZSIC, August 2010*

<i>ANZSIC Code</i>	<i>Industry Classification</i>	<i>Businesses (no.)</i>	<i>Estimated Area (ha)</i>
A	Agriculture, Forestry and Fishing	6	108.4
052	Agriculture and Fishing Support Services	6	108.4
C	Manufacturing	16	13.4
133	Textile Product Manufacturing	1	0.4
203	Cement, Lime, Plaster and Concrete Product Manufacturing	2	3.7
212	Basic Ferrous Metal Product Manufacturing	1	0.4
229	Fabricated Metal Product Manufacturing other than Iron and Steel Forging, Structural Metal Product, Metal Container and Sheet Metal Product Manufacturing	4	1.5
246	Specialised Machinery and Equipment Manufacturing	8	7.4
D	Electricity, Gas, Water and Waste Services	4	3.4
262	Electricity Transmission	1	1.6
281	Water Supply, Sewerage and Drainage Services	2	0.5
291	Waste Collection Services	1	1.4
E	Construction	10	10.6
301	Residential Building Construction	3	2.2
310	Heavy and Civil Engineering Construction	1	1.0
321	Land Development and Site Preparation Services	2	7.0
323	Building Installation Services	2	0.3
324	Building Completion Services	2	0.1
32	<i>Total Construction Services</i>	6	7.4
F	Wholesale Trade	32	36.0
331	Agricultural Product Wholesaling	9	19.2
332	Mineral, Metal and Chemical Wholesaling	10	7.4
333	Timber and Hardware Goods Wholesaling	1	0.1
33	<i>Total Basic Material Wholesaling</i>	20	26.7
341	Specialised Industrial Machinery & Equipment Wholesaling	9	8.4
349	Other Machinery and Equipment Wholesaling	2	0.8
34	<i>Total Machinery and Equipment Wholesaling</i>	11	9.2
371	Textile, Clothing and Footwear Wholesaling	1	0.1
380	Commission-Based Wholesaling	1	0.4
G	Retail Trade	7	1.9
391	Motor Vehicle Retailing	2	0.1
392	Motor Vehicle Parts and Tyre Retailing	2	0.7
39	<i>Motor Vehicle and Motor Vehicle Parts Retailing</i>	4	0.8

<i>ANZSIC Code</i>	<i>Industry Classification</i>	<i>Businesses (no.)</i>	<i>Estimated Area (ha)</i>
423	Hardware, Building and Garden Supplies Retailing	1	0.4
424	Recreational Goods Retailing	1	0.3
I	Transport, Postal and Warehousing	16	61.4
461	Road Freight Transport	8	8.4
471	Rail Freight Transport	2	1.1
530	Warehousing and Storage Services	6	51.9
L	Rental, Hiring and Real Estate Services	6	2.1
663	Goods and Equipment Rental and Hiring (other than vehicles and farm animals)	2	1.1
671	Property Operators	4	1.1
M	Professional, Scientific and Technical Services	4	1.0
692	Architectural, Engineering and Technical Services	2	0.4
697	Veterinary Services	2	0.6
O	Public Administration and Safety	1	0.3
771	Public Order and Safety Services	1	0.3
S	Other Services	24	7.2
941	Automotive Repair and Maintenance	19	4.8
942	Machinery and Equipment Repair and Maintenance	4	2.1
94	<i>Total Repair and Maintenance</i>	23	6.9
955	Civic, Professional and Other Interest Group Services	1	0.3
	Unknown	2	1.6
	TOTAL	128	247.2

Source: Foresight Partners estimates, August 2010

APPENDIX E – CONTRIBUTING FIRMS AND AGENCIES

Firms contributing to business discussions

Kenway and Clark
Fraser's Livestock Transport
Andersen Truck and Tractor Repairs
Toms Tarps
BSF
Goondiwindi Cotton
Hayes Spraying
Broadacre Irrigation
Ellis Freighters
Woods Grain

Contributing organisations and agencies

Border Rivers Chamber of Commerce
Economic Development Officer, Moree Plains Shire Council
Department of Infrastructure and Planning (Brisbane)
Department of Infrastructure and Planning (Toowoomba)

APPENDIX F – FORECAST RETAIL EXPENDITURE POTENTIAL

Table F.1: Medium series forecast retail expenditure potential generated, households in Goondiwindi catchment (2009 dollar values), 2011-2031

	<i>Take home food (\$m)</i>	<i>Meals Out (\$m)</i>	<i>Apparel (\$m)</i>	<i>Homewares/ services (\$m)</i>	<i>Total (\$m)</i>
2011					
Goondiwindi Township	26.7	8.9	6.4	26.3	68.2
Remainder of GRC	18.0	6.0	4.3	17.7	45.9
Northern NSW	7.0	2.3	1.7	6.9	17.8
Total catchment	51.6	17.1	12.4	50.8	131.9
2016					
Goondiwindi Township	29.0	9.6	7.0	28.6	74.1
Remainder of GRC	18.6	6.2	4.4	18.3	47.4
Northern NSW	7.3	2.4	1.7	7.1	18.5
Total catchment	54.8	18.2	13.1	53.9	140.1
2021					
Goondiwindi Township	31.3	10.4	7.5	30.8	80.0
Remainder of GRC	19.3	6.4	4.6	19.0	49.2
Northern NSW	7.5	2.5	1.8	7.4	19.3
Total catchment	58.1	19.3	13.9	57.2	148.5
2026					
Goondiwindi Township	33.5	11.1	8.0	32.9	85.5
Remainder of GRC	19.9	6.6	4.8	19.6	50.9
Northern NSW	7.8	2.6	1.9	7.7	20.0
Total catchment	61.2	20.3	14.7	60.2	156.4
2031					
Goondiwindi Township	35.7	11.8	8.6	35.2	91.3
Remainder of GRC	20.5	6.8	4.9	20.1	52.3
Northern NSW	8.1	2.7	2.0	8.0	20.8
Total catchment	64.3	21.3	15.4	63.3	164.3
Increase 2011-2031	12.7	4.2	3.1	12.5	32.4

Source: Foresight Partners calculations

Table F.2: High series forecast retail expenditure potential generated, households in Goondiwindi catchment (2009 dollar values), 2011-2031

	<i>Take home food (\$m)</i>	<i>Meals Out (\$m)</i>	<i>Apparel (\$m)</i>	<i>Homewares/ services (\$m)</i>	<i>Total (\$m)</i>
2011					
Goondiwindi Township	27.7	9.2	6.6	27.2	70.7
Remainder of GRC	18.1	6.0	4.3	17.8	46.1
Northern NSW	7.0	2.3	1.7	6.9	17.8
Total catchment	52.7	17.5	12.6	51.8	134.6
2016					
Goondiwindi Township	31.0	10.3	7.4	30.5	79.1
Remainder of GRC	18.8	6.2	4.5	18.5	48.0
Northern NSW	7.3	2.4	1.7	7.1	18.5
Total catchment	57.0	18.9	13.7	56.1	145.7
2021					
Goondiwindi Township	34.8	11.5	8.3	34.2	88.8
Remainder of GRC	19.6	6.5	4.7	19.3	50.1
Northern NSW	7.5	2.5	1.8	7.4	19.3
Total catchment	61.9	20.5	14.8	60.9	158.2
2026					
Goondiwindi Township	38.4	12.7	9.2	37.8	98.1
Remainder of GRC	20.4	6.8	4.9	20.1	52.2
Northern NSW	7.8	2.6	1.9	7.7	20.0
Total catchment	66.6	22.1	16.0	65.6	170.2
2031					
Goondiwindi Township	42.4	14.0	10.2	41.7	108.3
Remainder of GRC	21.2	7.0	5.1	20.9	54.2
Northern NSW	8.1	2.7	2.0	8.0	20.8
Total catchment	71.7	23.8	17.2	70.6	183.2
Increase 2011-2031	27.7	9.2	6.6	27.2	70.7

Source: Foresight Partners calculations