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# APPENDIX A – ECONOMIC IMPACT ASSESSMENT

*Location IQ*

February 2025

# GWF Toowoomba, Queensland

## Economic Impact Assessment

Prepared for George Weston Foods

locationiq.com.au

# Contents

# Introduction

This report presents an independent assessment of the need and demand for a planned mixed-use development by George Weston Food across a site on the western side of Gowrie Creek in the northern suburbs of Toowoomba. The development is referred to as Willows Crossing throughout the remained of this report. The report also considers the likely economic impacts that would result from the proposed development.

The report has been prepared in accordance with instructions received from George Weston Foods, and is structured and presented in **nine (9) sections** as follows:

- **Section 1** includes an overview of the location of the site. A review of the site plan is also provided along with a summary of the relevant planning documentation.
- **Section 2** outlines the trade area likely to be served by the proposed Willows Crossing development, including current and projected population levels. The socio-economic profile of the trade area population is also reviewed. An overview of workers at the nearby hospital is provided.
- **Section 3** assesses the potential and projected impacts for the proposed supermarket, retail specialty shops and large format retail floorspace as part of the planned Willows Crossing development.
- **Section 4** provides a review of the existing short-term accommodation facilities in the region as well as reviews the demand for a short term accommodation facility as part of the Willows Crossing development.
- **Section 5** details the existing and future childcare centres within the region. The potential for the proposed childcare centre as part of the Willows Crossing development is also reviewed.
- **Section 6** reviews the existing and future gyms within the region. The potential for the proposed gym as part of the Willows Crossing development is also outlined.
- **Section 7** details the existing and future fast food facilities within the region. The potential for the proposed fast food facilities as part of the Willows Crossing development is also reviewed.
- **Section 8** provides a summary of the existing and future medical centres within the region. The demand for the proposed medical centre, specialist medical facilities and ancillary medical practitioners as part of the Willows Crossing development is assessed.
- **Section 9** summarises the overall need and impact analysis for the proposed development

# Executive Summary

The key points to note from this report regarding the potential for a range of facilities at the Willows Crossing site include the following:

i. Toowoomba is a regional city located in the western part of South East Queensland, some 110 km from the Brisbane Central Business District (CBD).

ii. Regional accessibility is facilitated by both the Warrego Highway and the New England Highway, both of which are major roads providing easy access for the surrounding population.

iii. Based on the most recent traffic counts prepared by the Queensland State Government for the New England Highway to the west of the site, an average of 22,200 vehicles were recorded each day in 2023, equating to a passing traffic volume of around 8.1 million vehicles annually.

iv. Darling Downs Hospital (Baillie Henderson Hospital campus) is located to the immediate west of the site, on the opposite side of Mort Street. This is the site of the new Toowoomba Hospital.

v. The new Toowoomba Hospital is a $1.3 billion healthcare development aimed at significantly expanding medical services to meet the growing needs of the Toowoomba region. Announced in the 2022/23 Queensland State Budget, this major infrastructure project will be constructed on the existing Baillie Henderson Hospital campus and is expected to be completed by late 2027. Once operational, it will add 118 new overnight beds and deliver enhanced healthcare services, ensuring that more patients can access critical treatments locally.

vi. The construction of the hospital will provide an economic boost to the local community, creating an estimated 3,127 jobs throughout the construction phase.

vii. George Weston Foods own two sites separated by the Gowrie Creek in the northern suburbs of Toowoomba. The western site is the subject of this report and is elongated in a north-south orientation, comprising six precincts which could include a range of uses such as service industry, accommodation, medical/professional, Crossing Central (convenience retail, offices, food and drink outlets, and community services), commercial retail services, and open space.

viii. The site on the eastern side of the Gowrie Creek is proposed to include low density, medium density and mixed residential uses. The residential estate is known as The Willows and will include 900 dwellings (around 2,250 persons), with residential development assumed to take place between 2027 and 2035.

ix. The trade area is defined to include three primary sectors, three secondary sectors and one tertiary sector for the Willows Crossing site. The main trade area generally extends some 5 km to the south and 20 km to the north, east and west of the site. The extent of the catchment is restricted by retail and other commercial facilities within the Toowoomba Commercial Business Area (CBA) to the south. In addition to the main trade area, a tertiary sector has been defined following the alignment of the Warrego Highway and encompassing the town of Oakey to the north-west of the Toowoomba urban area.

x. As shown the total trade area population is currently estimated at 86,328 including 81,118 persons from the main trade area and 12,131 persons in the combined primary sectors. Over the period to 2041, the total trade area population is projected to increase to approximately 112,500, including 107,000 persons in the main trade area and 15,150 persons in the combined primary sectors. This represents a projected growth rate of 1.6% for the total trade area, or 1,541 persons per annum over the forecast period, which is higher than both the South East Queensland and Australian averages.

xi. Based on the population, demand, occupancy, and supply factors outlined throughout this assessment, the planned uses as part of the Willows Crossing mixed-use development will experience growth over and beyond the forecast period based on the planned population growth and expected increase in worker population in the immediate area.

xii. The proposed development is planned to comprise ~17,600 sq.m of floorspace, including a retail component of 7,800 sq.m, including traditional retail (2,800 sq.m) and large format retail (5,000 sq.m).

xiii. Significant components of the proposed development include:

- A small supermarket of 1,800 sq.m.
- Specialty shops including 1,000 sq.m of retail and 200 sq.m of non-retail floorspace.
- Large format retail floorspace (5,000 sq.m)
- Gym (400 sq.m)
- A medical centre (500 sq.m)
- Specialist medical facilities and ancillary medical practitioners (~4,000 sq.m)
- Two fast food pad sites (700 sq.m)
- Short term accommodation (~100 rooms) with a bar/restaurant on the ground level.
- A childcare centre of 1,000 sq.m

xiv. The proposed development would service current and future residents and workers of the region.

xv. Given the growth in the market and proposed composition, the subject development is anticipated to have a negligible impact on existing and future retail and non-retail facilities throughout the region – given there is sufficient demand and facilities.

xvi. The retail components of the development including traditional retail floorspace, large format retail floorspace and fast food facilities with drive-thru are expected to achieve sales in the order of $44.8 million (FY2028/29). The overall growth in retail expenditure for the total trade area over the period to 2041 is $761.3 million, the proposed Willows Crossing development would account for around 6% of the expected growth in the total trade area retail expenditure. This means any potential impacts from the proposed Willows Crossing development will be ameliorated quickly.

xvii. The development would also create a precinct that comprises a range of complementary uses and provides a destinational centre for residents, servicing their daily convenience needs.

xviii. There is a community and economic need for a mixed-use development to be developed within the trade area which would result in a range of important economic benefits including:

- Overall, all uses as part of the mixed-use development would minimally impact surrounding uses, as well as have no impact on the existing centre hierarchy within the region.
- The development would combine a range of complementary uses in a central location in close proximity to a major employment hub.
- Increased convenience, choice of services, and possibly price competitiveness for residents. There is a gap for a mixed-use development in the trade area given the planned growth in the region. The subject development would provide additional retail and non-retail floorspace, with a focus on medical uses given the proximity to the new Toowoomba Hospital.
- The proposed development aligns with typical industry benchmarks in terms of size, layout, and design.
- The development will provide high-quality amenities, design, and aesthetics, thereby improving the customer experience and creating strong community engagement.
- By offering a mix of retail and non-retail uses, the development will retain demand within the trade area that would otherwise be directed elsewhere.
- The site will not impact on the centre hierarchy or on the viability of any centres.

xix. It is the conclusion of this report that a substantial net community benefit would result from the proposed Willows Crossing development. Offsetting the minimal trading impacts on some existing retailers, there are very substantial positive impacts including the following:

- Improvement in the range of retail and non-retail facilities available to local residents, this will lead to greater price competition.
- Access to a mixed-use development including uses such as a new childcare centre in the local area near a major employment hub (i.e. the new Toowoomba Hospital) ensuring families do not have to travel beyond their immediate area.
- The creation of additional choice within the surrounding area.
- The retention of demand currently being directed to other facilities situated beyond the trade area, thereby reducing the need for residents to travel further afield or leave to have their specific needs met.
- Improvement in the range of facilities available to residents by way of a new and modern development. The facility would be of a high-quality, as well as being in close proximity to workplaces, and places of residence. This will lead to greater choice and standard of services, as well as other factors price and choice competition.
- High quality design amenity, landscaping and finishing will ensure the local population has a strong affinity with the site.
- The creation of additional employment which would result from the project, both during the construction period, and more importantly, on an ongoing basis once the development is complete and operational. In total, some 1,012 jobs are likely to be created both directly and indirectly as a result of the Willows Crossing development. This includes a number of youth employment opportunities with retail developments generally employing a large number of younger staff.

xx. It is concluded that the combination of the substantial positive economic impacts serves to more than offset the trading impacts that could be anticipated for a small number of existing retailers. Further, the impacts would not threaten the hierarchy or viability of any centres given the significant residential and employment growth planned within the trade area.

# 1 Location & Planning

This section of the report reviews the regional and local context of the subject site and provides an overview of the general precinct plan and planning documentation.

## 1.1. Regional and Local Context

i. Toowoomba is a regional city located in the Darling Downs Region of South East Queensland, some 110 km south-west of the Brisbane Central Business District (CBD) (refer Map 1.1).

ii. Regional accessibility is facilitated by the Warrego Highway and the New England Highway, both of which are major roads providing easy access for the surrounding population. The New England Highway links Toowoomba with northern parts of the New England region of New South Wales. The Warrego Highway forms part of the Toowoomba bypass and links Toowoomba with other major destinations in South East Queensland.

iii. The subject site is located on the southern side of the Warrego Highway to the west of the New England Highway. George Weston Foods own two sites separated by the Gowrie Creek. For the purpose of this report the subject site is west of Gowrie Creek and is referred to as the Willows Crossing site for the remainder of this report. The adjacent site to the east of Gowrie Creek is referred to as The Willows, a community precinct which is understood to be in the planning stages.

iv. Based on the most recent traffic counts prepared by the Queensland State Government for the New England Highway to the west of the site (refer Map 1.2), an average of 22,200 vehicles were recorded each day in 2023, equating to a passing traffic volume of around 8.1 million vehicles annually.

v. The Toowoomba Central Business Area (CBA) is 4.3 km to the south of the site and is the major focus of retail and commercial activities in Toowoomba.

vi. Map 1.1 also illustrates the local context of the Willows Crossing site, with key points to note including:

- Darling Downs Hospital (Baillie Henderson Hospital campus) is to the immediate west of the site, on the opposite side of Mort Street. Additional details on the new, relocated of the existing Toowoomba Hospital are provided below.
- Palm Lake Retirement Village is west of Darling Downs Hospital and provides a range of two- and three-bedroom homes for over-50s.
- A large provision of industrial floorspace is south of Griffiths Street, focused along Mort Street.
- Several education facilities are within close proximity of the site, including Rockville Primary School and Leslie Research Centre.

vii. Overall, the Willows Crossing site occupies a high-profile location that enjoys excellent regional and local accessibility for surrounding residents in the northern suburbs of Toowoomba. The nearby, new Toowoomba Hospital and education facilities reinforce the location of the site for surrounding residents.

### Toowoomba Hospital

i. The new Toowoomba Hospital is a $1.3 billion healthcare development aimed at significantly expanding medical services to meet the growing needs of the Toowoomba region. Announced in the 2022/23 Queensland State Budget, this major infrastructure project will be constructed on the existing Baillie Henderson Hospital campus and is expected to be completed by late 2027. Once operational, it will add 118 new overnight beds and deliver enhanced healthcare services, ensuring that more patients can access critical treatments locally, reducing the need for residents to travel to metropolitan areas for advanced medical care.

ii. The hospital is set to be part of a broader world-class health and knowledge precinct, situated on a 75-hectare campus that blends modern healthcare facilities with historical and natural elements.

iii. A key objective of the new hospital is to improve patient outcomes by offering timely access to treatment and reducing wait times. In addition to benefiting patients, the project also aims to improve staff retention and recruitment by creating a more efficient, accessible, and pleasant workplace. Opportunities for the training and development of healthcare staff will be enhanced, positioning the hospital as a centre for learning as well as patient care.

iv. The construction of the hospital will provide an economic boost to the local community, creating an estimated 3,127 jobs throughout the construction phase. This will be a significant injection into the regional economy, benefiting not only the health sector but also local businesses and services.

v. The project will follow a two-campus model, where the existing Toowoomba Hospital on Pechey Street will remain operational throughout the construction. Once the new hospital is completed, acute services will transition to the new facility, while other services may continue to operate from the Pechey Street site. This dual-campus approach ensures there is no disruption to the essential medical services provided to the community during the transition period.

vi. To ensure safety during construction, Burnview Avenue (from Nicoll Ave to Mort St) has been closed, with detours in place to guide traffic. Pedestrian and cyclist access will still be maintained via the Tor Street entrance.

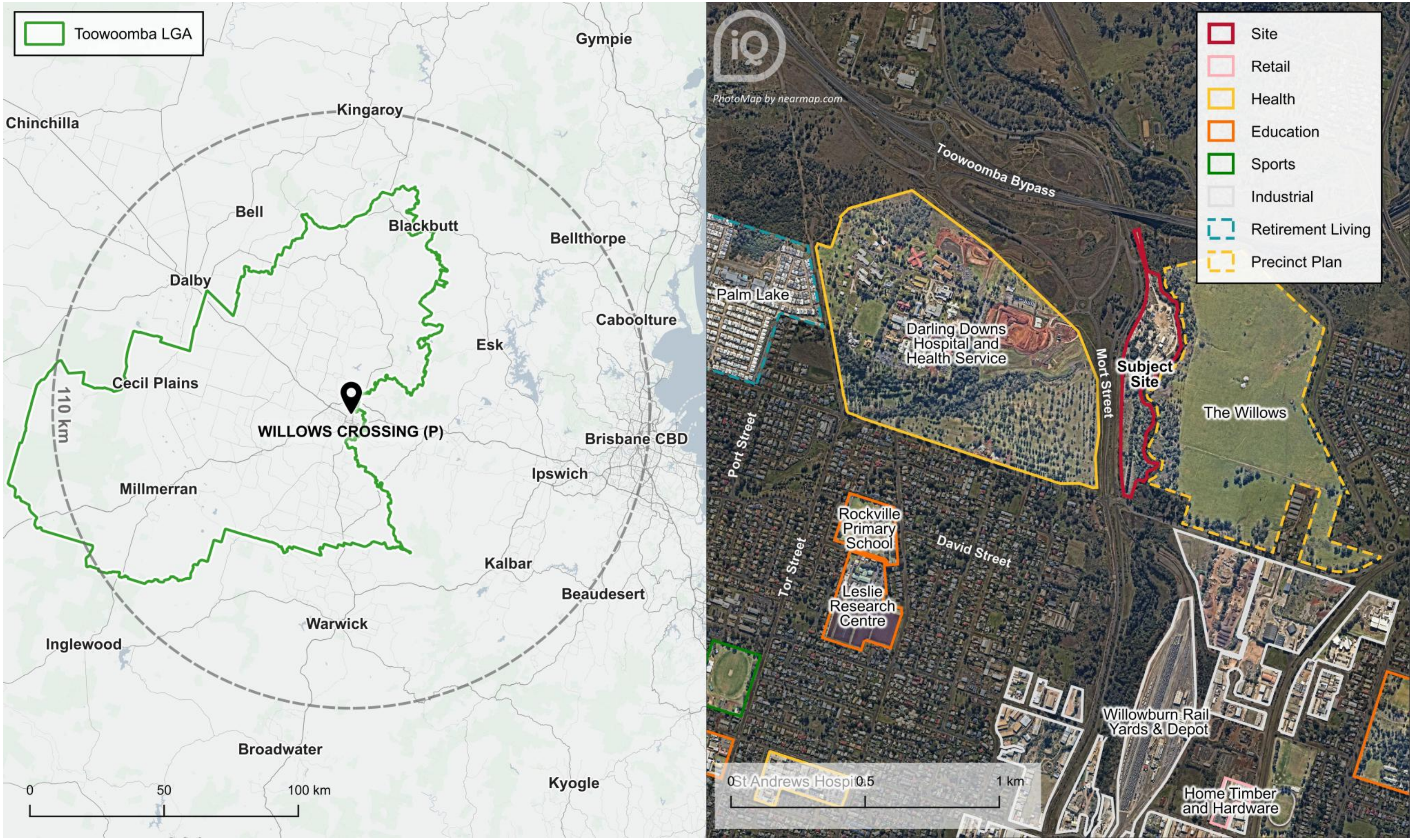
vii. With the design finalisation set for December 2024, and early works beginning in 2024, the project is well underway. By late 2027, the Toowoomba community will have access to a state-of-the-art healthcare facility that will enhance local health services, support the region’s growing population, and serve as a centre for medical excellence.

### Road Upgrades

i. Significant population growth in the northern suburbs of Toowoomba – such as Highfields, Meringandan and Gowrie – will result in capacity constraints of current connections with these suburbs and the Toowoomba CBA, namely the New England Highway. This would necessitate a new road link to the Toowoomba CBA.

ii. The *Toowoomba Region Sustainable Transport Strategy (December 2014)* outlined a preference for upgrading Mort Street and creating a new connection between Old Goombungee Road and Mort Street to alleviate traffic on the New England Highway (refer Figure 1.1 – references A1 and A2). This would result in significant additional traffic flows past the Willows Crossing site.

MAP 1.1. WILLOWS CROSSING REGIONAL AND LOCAL CONTEXT



## MAP 1.2. WILLOWS CROSSING TRAFFIC COUNTS

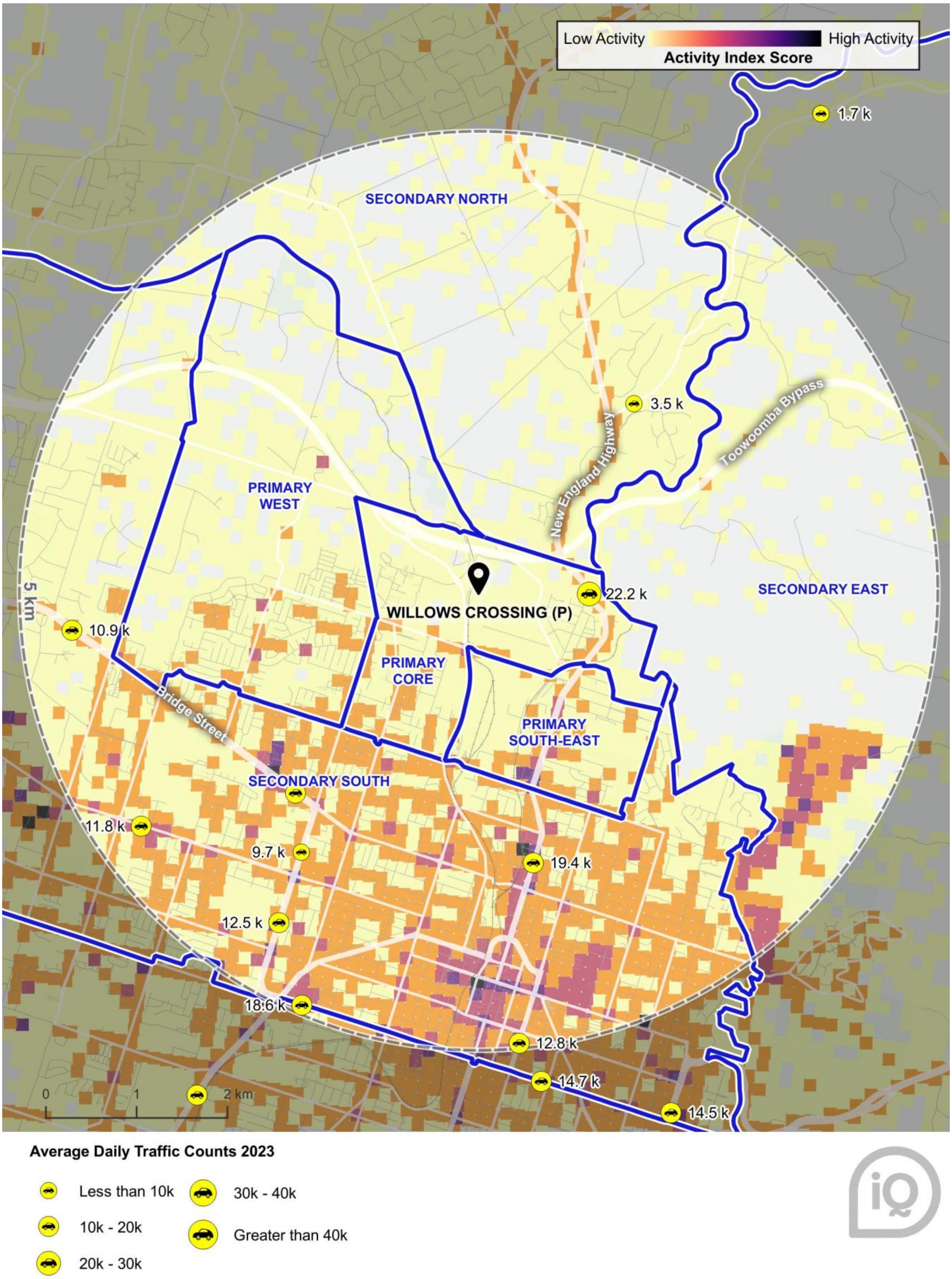


FIGURE 1.1. TOOWOOMBA REGION SUSTAINABLE TRANSPORT STRATEGY IMPLEMENTATION PROJECTS

## 1.2. Proposed Development

i. George Weston Foods own two sites separated by the Gowrie Creek in the northern suburbs of Toowoomba. The western site is the subject of this report, known as Willows Crossing, and is elongated in a north-south orientation, comprising six precincts (refer Figure 1.1) which could include a range of uses as discussed in detail in Section 1.3.

ii. This report will consider the need and demand as well as the likely economic impacts from a range of uses forming part of the proposed development as outlined in Table 1.1. The proposed development comprises some 17,100 sq.m of floorspace, including a retail component of 7,800 sq.m, the majority of which is large format retail (5,000 sq.m).

iii. Other significant components of the proposed development include medical uses (4,500 sq.m), short term accommodation (2,500 sq.m) and childcare (1,000 sq.m).

iv. Three access points are provided to the site as follows:

- To the south along Griffiths Street, near the intersection with Mort Street.
- In the middle of the site, along Mort Street.
- At the northern end of the site with frontage to Hermitage Street.

v. The site on the eastern side of the Gowrie Creek is proposed to include low density, medium density and mixed residential uses (refer Figure 1.2). The residential estate is known as The Willows and will include 900 dwellings (around 2,250 persons), with residential development assumed to take place between 2027 and 2035. Other key points to note include:

- A community precinct is planned on the eastern side of The Willows with frontage to Goombungee Road.
- Open space is indicated at the southern end of The Willows and also along the banks of the Gowrie Creek to the west.

TABLE 1.1. WILLOWS CROSSING PROPOSDED DEVELOPMENT, WESTERN PRECINCT

| Category | No. Tenants | Total GLA |
|---|---|---|
| **Retail** | | **8,000** |
| • Small supermarket/foodstore | 1 | 1,800 |
| • Retail Specialty | 8 | 1,000 |
| • Non-retail Specialty | 2 | 200 |
| • LFR | 7 | 5,000 |
| **Health & Fitness** | | **400** |
| • Gym | 1 | 400 |
| **Medical** | | **4,500** |
| • Medical Centre | 1 | 500 |
| • Ancillary Medical Uses | 1 | 4,000 |
| **Pad Sites** | | **700** |
| • Fast Food | 2 | 700 |
| **Short Term Accommodation** | | **2,500** |
| • Hotel | 1 | 2,500 |
| **Other** | | **1,000** |
| • Childcare Centre | 1 | 1,000 |
| **Total Uses** | | **17,100** |

FIGURE 1.2. WILLOWS CROSSING SITE, WESTERN PRECINCT

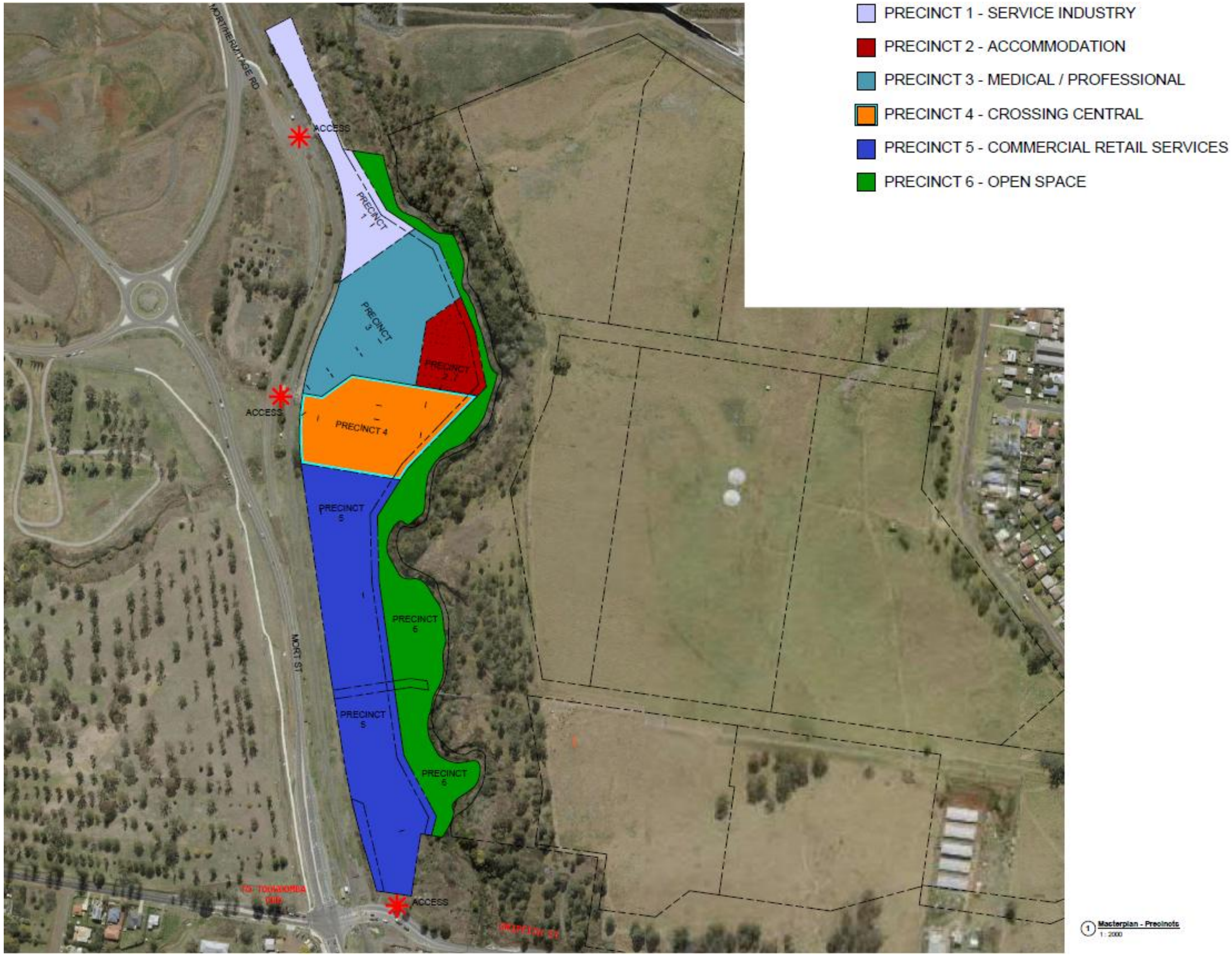
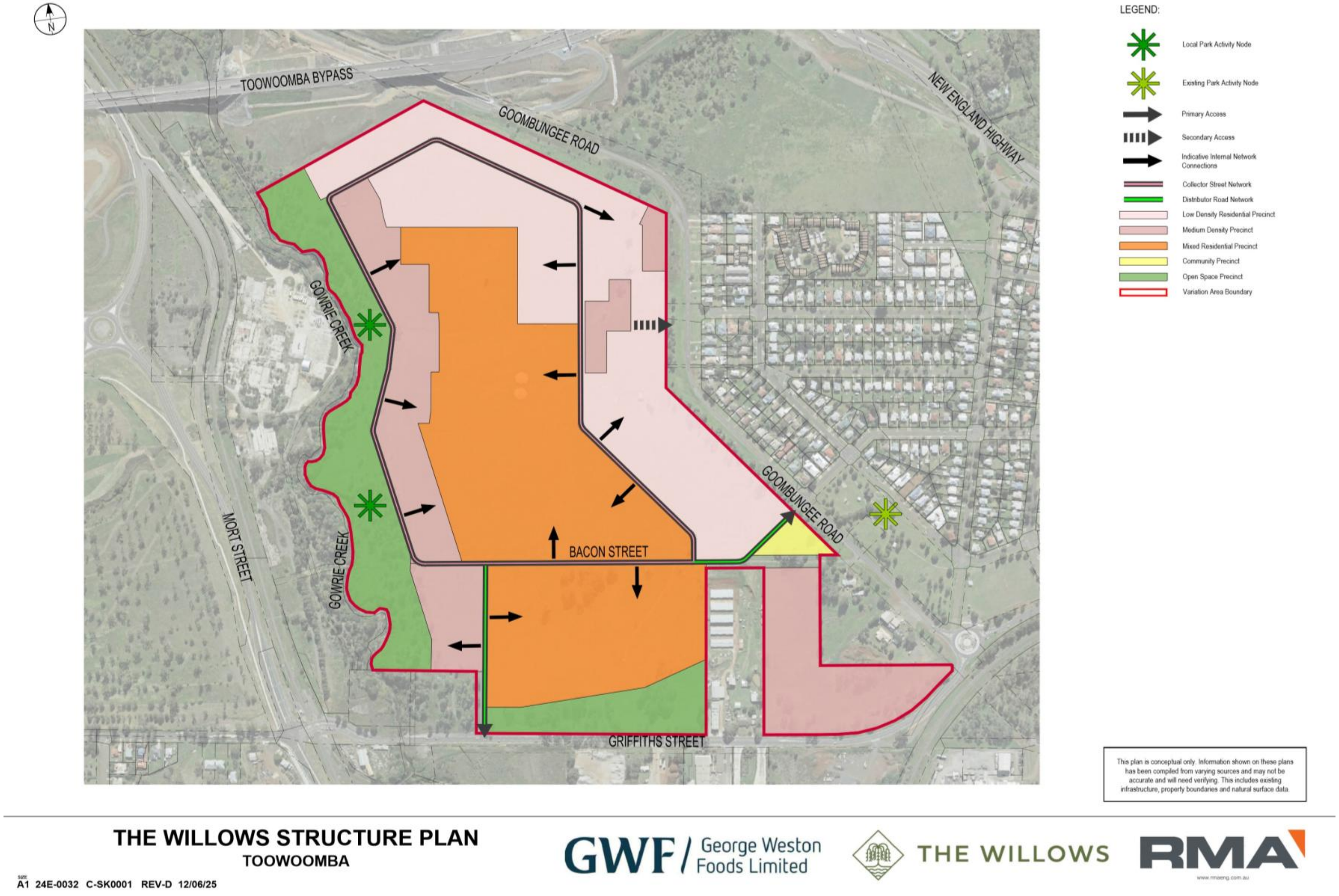


FIGURE 1.3. THE WILLOWS, EASTERN PRECINCT



## 1.3. Willows Crossing Planning Summary

i. The planning intent and outcomes for the Willows Crossing area are summarised within *Volume 3 – Variation Scheme Document, October 2019* which has been provided to this office. Note that the precinct numbers within this document do not align with the precinct numbers outlined previously in Figure 1.1. Precinct 2 (Accommodation) has been added in the figure, with the other uses remaining consistent.

ii. Key points regarding the outcomes for each precinct are as follows:

**Precinct 1 – Service Industry**:

- This precinct supports low-impact and service industries, particularly those that complement nearby medical, professional, and commercial activities.
- Non-industrial uses, such as food outlets and service stations, are permitted only if they directly support industrial functions and are accessible by walking or cycling.
- Development must avoid introducing higher-impact industries or activities that could compromise the intended low-impact industrial nature of the precinct.
- The purpose is to prevent conflicting land uses and ensure that the precinct remains suitable for its designated service-industrial role, without competing with more commercial centres in the hierarchy.

**Precinct 2 – Accommodation**

- This precinct will include accommodation facilities to support the precinct supports people who require short term accommodate when visiting, the nearby Ballie Henderson Hospital, accommodation for nearby workers.
- The precinct is designed to be accessible and complement the surrounding areas.

**Precinct 3 – Medical/Professional**:

- This precinct supports medical, para-medical, and related professional services, particularly to service the nearby Ballie Henderson Hospital.
- Larger retail activities (e.g., supermarkets, department stores) are explicitly prohibited to protect the precinct's medical and professional focus.
- The precinct is designed to be accessible and integrated with surrounding areas but does not aim to compete with higher-order retail centres, ensuring it maintains a complementary rather than competing role within the local centre hierarchy.

**Precinct 4 – Crossing Central**:

- Designed as a mixed-use hub, Crossing Central allows convenience retail, offices, food and drink outlets, and community services to serve a neighbourhood-to-district-level catchment, including nearby residential areas and the hospital precinct.

- The precinct is intended to support, rather than compete with, higher-order centres, with no provision for large-scale retail like department stores.
- Buildings are required to offer a pedestrian-friendly environment, incorporate public spaces, and promote sustainable transport, enhancing local access without undermining larger commercial centres.

**Precinct 5 – Commercial Retail Services**:

- This precinct is reserved for large-format retail uses, such as bulky goods, showrooms, and trade supplies, while excluding major retail outlets like supermarkets or department stores.
- The goal is to ensure that the precinct supports large-scale retail needs without encroaching on the roles of higher-order centres, maintaining clear distinctions between retail hierarchies.
- The development of smaller business activities is limited to supporting the primary retail functions to prevent an overlap with nearby commercial zones.

**Precinct 6 – Open Space**:

- Focused on providing recreational spaces rather than building development, this precinct is designed to integrate open space networks and support active transport routes, benefiting both the Willows Crossing area and surrounding residential areas.
- Any structures within this precinct must complement the open space concept, enhancing the liveability of the area without negatively impacting adjacent residential or commercial zones.

iii. Across all precincts, there is a clear intent to avoid undermining the role and function of higher-order centres in the area. Larger retail activities and entertainment uses that could compete with established retail or commercial centres are explicitly restricted, ensuring that development within the Willows Crossing area is complementary to, rather than competing with, the broader regional hierarchy of centres. This ensures that the precincts serve their intended roles without disrupting the balance of commercial and retail distribution in surrounding areas.

# 2 Trade Area Analysis

This section of the report provides a review of the trade area likely to be served by future retail and non-retail uses provided at the Willows Crossing site, including current and projected population over the period to 2041. A review of the socio-economic profile of the trade area population is also provided along with details of the worker population as part of the new hospital.

## 2.1. Trade Area Definition

i. The Willows Crossing trade area has been defined taking into consideration the following:

- Regional and local accessibility.
- The pattern of urban development throughout the region.
- Significant physical barriers such as roads, waterways, and parkland.
- The provision of existing and planned competitive facilities throughout the surrounding area.

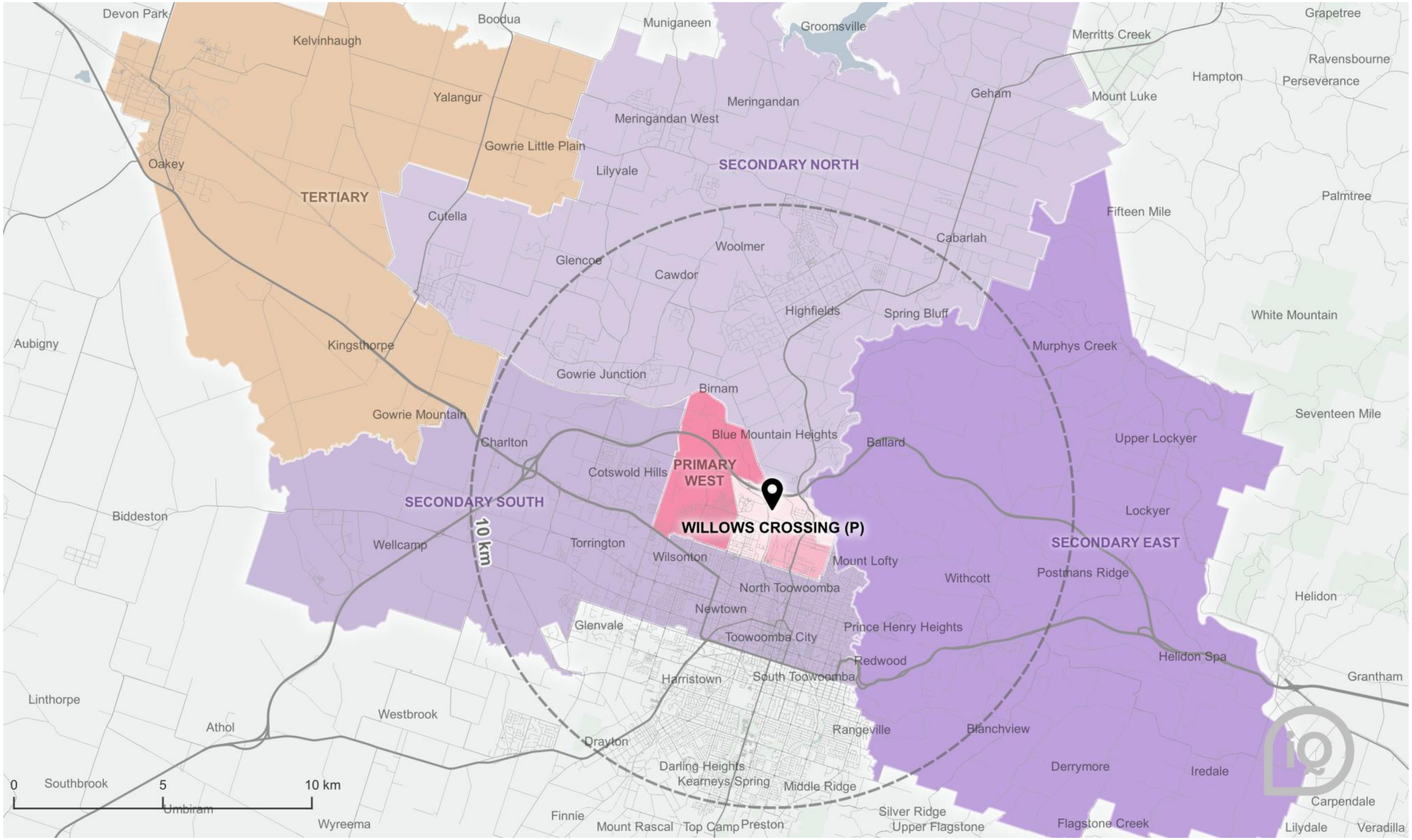
ii. Map 2.1 illustrates the defined trade area likely to be served by retail and non-retail floorspace included at the Willows Crossing site. The trade area is defined to include three primary sectors, three secondary sectors and one tertiary sector as follows:

- The **primary core sector** extends to the south of the Warrego Highway/Toowoomba Bypass and includes the residential suburb of Rockville.
- The **primary south-east sector** extends to the east of Mort Street, including the industrial and residential suburb of Harlaxton.
- The **primary west sector** is primarily rural and residential in nature, extending to the west of Tor Street.
- The **secondary north sector** includes the satellite towns of Highfields, Blue Mountain Heights and Gowrie Junction to the north of the Toowoomba urban area.
- The **secondary east sector** is located to the east of the Toowoomba urban area is largely centred around the town of Withcott.
- The **secondary south sector** includes the Toowoomba Central Business Area (CBA), extending east to include the major suburbs of Wilsonton and Wellcamp which includes Toowoomba Airport.

iii. The combination of the primary and secondary sectors is referred to as the Willows Crossing main trade area throughout the remainder of this report. The primary sectors represent a localised catchment, reflective of the area from which convenience based traditional retail facilities, such as a small supermarket, would draw from. The main trade area (i.e. the inclusion of the secondary sectors) is the appropriate area to consider when analysing the potential for Large Format Retail and other non-retail uses (assess in Section 4). The main trade area generally extends some 5 km to the south and 20 km to the north, east and west of the site. The extent of the catchment is restricted by retail and other commercial facilities within the Toowoomba Commercial Business Area (CBA) to the south.

iv. In addition to the main trade area, a tertiary sector has been defined following the alignment of the Warrego Highway and encompassing the town of Oakey to the north-west of the Toowoomba urban area. The combination of the main trade area and tertiary sector is referred to as the total trade area throughout this report.

MAP 2.1. WILLOWS CROSSING MAIN TRADE AREA AND SUBURBS



# 2.2. Main Trade Area Population

i. Tables 2.1 and 2.2 detail the Willows Crossing trade area current and projected population levels by sector. This information is sourced from the following:

- The 2011, 2016, and 2021 Census of Population and Housing undertaken by the Australian Bureau of Statistics (ABS).
- New dwelling approvals statistics from the ABS from 2011/12 to 2023/24 (refer Charts 2.1 – 2.3), which indicate an average of 477 new dwellings were approved for the total trade area annually over this timeframe. This includes an average of 463 across the main trade area and 72 across the combined primary sectors. New dwelling approvals per year have remained broadly consistent across the main trade area over this time period.
- The latest population projections prepared at a Statistical Area 2 (SA2) level by the Queensland Government Statisticians Office.
- Investigations by this office into new residential developments in the region.
- Broadhectare study released by the Queensland Government Statistician's Office in 2023. There is considerable land within the total trade area with potential for residential development over the forecast period (refer Map 2.2). Approximately 1,951 hectares of broadhectare land is available for future residential development within the total trade area. This equates to capacity for an estimated 48,598 dwellings.

ii. Table 2.1 outlines the historical and projected population growth within the total trade area over the 2011-2041 period. As shown the total trade area population is currently estimated at 86,328 including 81,118 persons from the main trade area and 12,131 persons in the combined primary sectors.

iii. Over the period to 2041, the total trade area population is projected to increase to approximately 112,528, including 106,978 persons in the main trade area and 15,141 persons in the combined primary sectors. This represents a projected growth rate of 1.6% for the total trade area, or 1,541 persons per annum over the forecast period, which is higher than both the South East Queensland and Australian averages.

iv. Future population growth throughout the trade area will be driven by several residential estates and land releases. Key developments are described as follows:

**Primary Core Sector**

- **The Willows (immediately east of Willows Crossing)** is planned to yield approximately 900 dwellings according to information provided by RMA Engineers, and will include a mixture of low and medium density precincts. The first lots are anticipated for June 2026, with dwellings to follow shortly after. It has been assumed that dwelling completion will occur at a rate of 100 dwellings per year, meaning homes will be provided between 2027 and 2035. 2.5 persons per household have been assumed for these dwellings, resulting a resident population of 2,250.

**Secondary North Sector**

- **Habitat Mt Kynoch** is a staged development of 147-hectares of land to comprise 1,310 residential lots. The residential subdivision has received rezoning approval.

- The **Avenues of Highfield Estate** is a proposed masterplanned community that will develop 420 lots over eight stages upon completion, with some 300 homes completed so far. Adjoining land will provide a further 400 homes once the current allocation is fully developed.

- At **248 Woolmer Road,** a subdivision of 203 residential lots is planned to take place, with subdivision approval granted.

**Secondary South Sector**

- **Gainsborough Lodge** in Wellcamp is anticipated to include 398 lots, with subdivision approval granted in late-2023.

- **Affordable Housing Units on Princess Street** will comprise 185 dwellings, with the development currently awaiting approval.

v. Notably, the secondary sectors contain a substantial amount of broadhectare land, with capacity for approximately 15,000 homes in the secondary east, north and south sectors. Whilst capacity for these sectors is not a limiting factor for future population growth, the rate of demand and supply currently within these sectors indicates that development will occur well beyond the forecast period.

vi. It is important to note that the population projections in this report are based on current market conditions and the latest available information collected by, or provided to this office. If market conditions change, this could impact population recommendations outlined in this assessment.

MAP 2.2. TOOWOOMBA BROADHECTARE

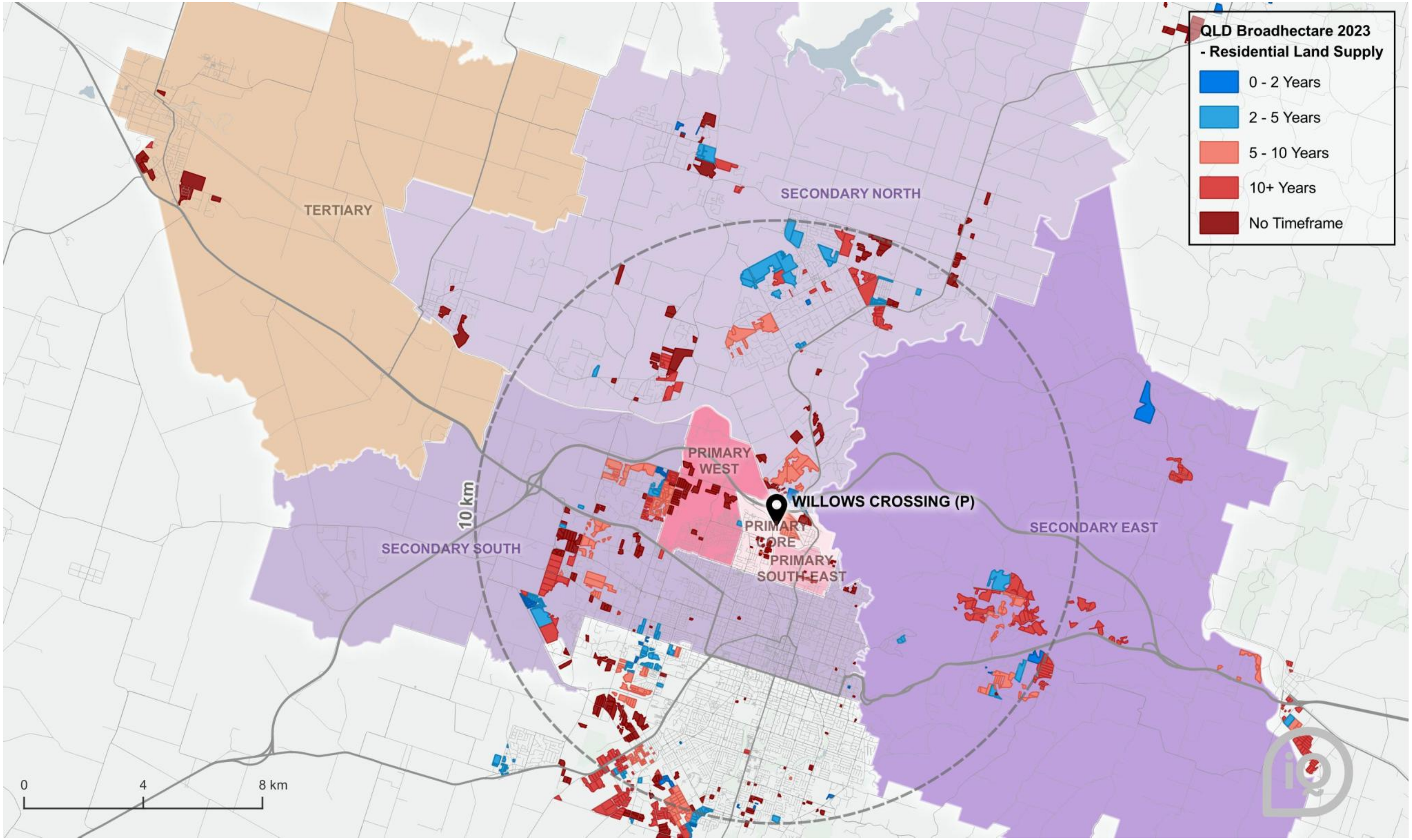


TABLE 2.1. MAIN TRADE AREA POPULATION, 2011 – 2041

| Population | Actual | | | Forecast | | | | | *Change* |
|---|---|---|---|---|---|---|---|---|---|
| | 2011 | 2016 | 2021 | 2024 | 2026 | 2031 | 2036 | 2041 | *2024-41* |
| **Primary Sectors** | | | | | | | | | |
| • Core | 3,581 | 3,465 | 3,556 | 3,586 | 3,606 | 4,606 | 5,606 | 5,856 | *2,270* |
| • South-east | 1,786 | 1,653 | 1,820 | 1,880 | 1,920 | 2,020 | 2,120 | 2,220 | *340* |
| • West | 5,217 | 5,695 | 6,515 | 6,665 | 6,765 | 6,865 | 6,965 | 7,065 | *400* |
| Total Primary | 10,584 | 10,813 | 11,891 | 12,131 | 12,291 | 13,491 | 14,691 | 15,141 | *3,010* |
| **Secondary Sectors** | | | | | | | | | |
| • East | 4,845 | 5,471 | 5,672 | 5,822 | 5,922 | 6,672 | 7,672 | 9,172 | *3,350* |
| • North | 17,347 | 20,208 | 22,191 | 24,141 | 25,441 | 28,941 | 32,441 | 35,941 | *11,800* |
| • South | 36,143 | 35,492 | 38,124 | 39,024 | 39,724 | 41,974 | 44,224 | 46,724 | *7,700* |
| Total Secondary | 58,335 | 61,171 | 65,987 | 68,987 | 71,087 | 77,587 | 84,337 | 91,837 | *22,850* |
| **Main Trade Area** | **68,919** | **71,984** | **77,878** | **81,118** | **83,378** | **91,078** | **99,028** | **106,978** | ***25,860*** |
| Tertiary | 4,901 | 5,051 | 5,150 | 5,210 | 5,250 | 5,350 | 5,450 | 5,550 | *340* |
| **Total Trade Area** | **73,820** | **77,035** | **83,028** | **86,328** | **88,628** | **96,428** | **104,478** | **112,528** | ***26,200*** |

*All figures as at June and based on 2021 SA1 boundary definition.*
*Sources : ABS; QGSO*

### TABLE 2.2. MAIN TRADE AREA POPULATION AVERAGE ANNUAL CHANGE, 2011 – 2041

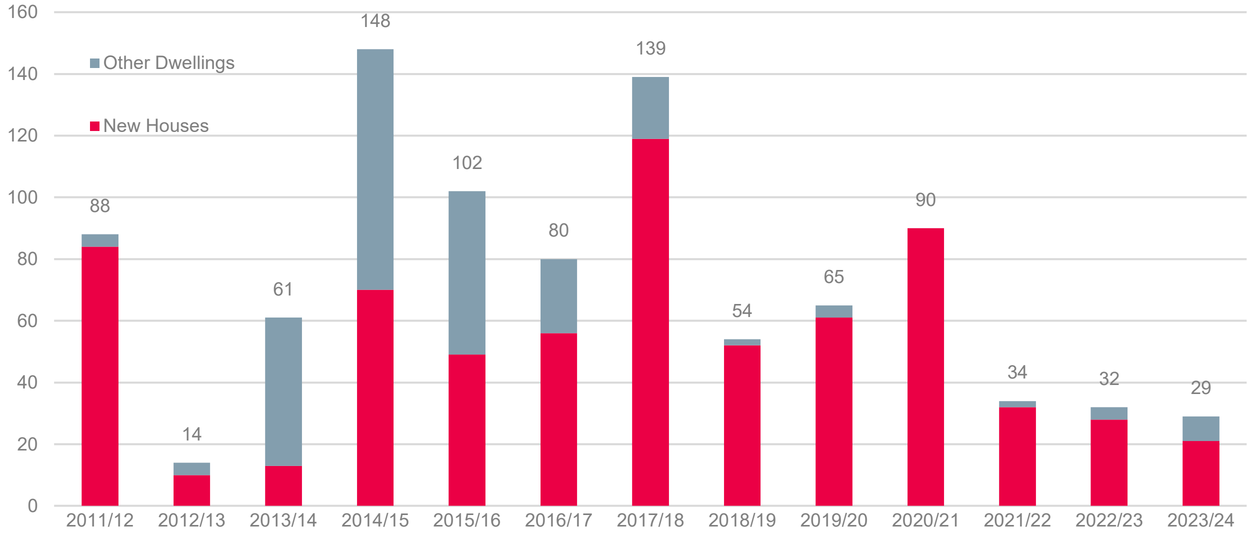
| Average Annual Change (No.) | Actual 2011-16 | Actual 2016-21 | Forecast 2021-24 | Forecast 2024-26 | Forecast 2026-31 | Forecast 2031-36 | Forecast 2036-41 | *Change 2024-41* |
|---|---|---|---|---|---|---|---|---|
| **Primary Sectors** | | | | | | | | |
| • Core | -23 | 18 | 10 | 10 | 200 | 200 | 50 | *134* |
| • South-east | -27 | 33 | 20 | 20 | 20 | 20 | 20 | *20* |
| • West | 96 | 164 | 50 | 50 | 20 | 20 | 20 | *24* |
| Total Primary | 46 | 216 | 80 | 80 | 240 | 240 | 90 | *177* |
| **Secondary Sectors** | | | | | | | | |
| • East | 125 | 40 | 50 | 50 | 150 | 200 | 300 | *197* |
| • North | 572 | 397 | 650 | 650 | 700 | 700 | 700 | *694* |
| • South | -130 | 526 | 300 | 350 | 450 | 450 | 500 | *453* |
| Total Secondary | 567 | 963 | 1,000 | 1,050 | 1,300 | 1,350 | 1,500 | *1,344* |
| **Main Trade Area** | **613** | **1,179** | **1,080** | **1,130** | **1,540** | **1,590** | **1,590** | ***1,521*** |
| Tertiary | 30 | 20 | 20 | 20 | 20 | 20 | 20 | *20* |
| **Total Trade Area** | **643** | **1,199** | **1,100** | **1,150** | **1,560** | **1,610** | **1,610** | ***1,541*** |

| Average Annual Change (%) | Actual 2011-16 | Actual 2016-21 | Forecast 2021-24 | Forecast 2024-26 | Forecast 2026-31 | Forecast 2031-36 | Forecast 2036-41 | *Change 2024-41* |
|---|---|---|---|---|---|---|---|---|
| **Primary Sectors** | | | | | | | | |
| • Core | -0.7% | 0.5% | 0.3% | 0.3% | 5.0% | 4.0% | 0.9% | *2.9%* |
| • South-east | -1.5% | 1.9% | 1.1% | 1.1% | 1.0% | 1.0% | 0.9% | *1.0%* |
| • West | 1.8% | 2.7% | 0.8% | 0.7% | 0.3% | 0.3% | 0.3% | *0.3%* |
| Total Primary | 0.4% | 1.9% | 0.7% | 0.7% | 1.9% | 1.7% | 0.6% | *1.3%* |
| **Secondary Sectors** | | | | | | | | |
| • East | 2.5% | 0.7% | 0.9% | 0.9% | 2.4% | 2.8% | 3.6% | *2.7%* |
| • North | 3.1% | 1.9% | 2.8% | 2.7% | 2.6% | 2.3% | 2.1% | *2.4%* |
| • South | -0.4% | 1.4% | 0.8% | 0.9% | 1.1% | 1.0% | 1.1% | *1.1%* |
| Total Secondary | 1.0% | 1.5% | 1.5% | 1.5% | 1.8% | 1.7% | 1.7% | *1.7%* |
| **Main Trade Area** | **0.9%** | **1.6%** | **1.4%** | **1.4%** | **1.8%** | **1.7%** | **1.6%** | ***1.6%*** |
| Tertiary | 0.6% | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | 0.4% | *0.4%* |
| **Total Trade Area** | **0.9%** | **1.5%** | **1.3%** | **1.3%** | **1.7%** | **1.6%** | **1.5%** | ***1.6%*** |
| *SE QLD* | *2.0%* | *1.8%* | *1.6%* | *1.4%* | *1.3%* | *1.7%* | *1.6%* | *1.5%* |
| *Australian Average* | *1.6%* | *1.2%* | *2.4%* | *1.6%* | *1.3%* | *1.2%* | *1.1%* | *1.3%* |

*All figures as at June and based on 2021 SA1 boundary definition.*

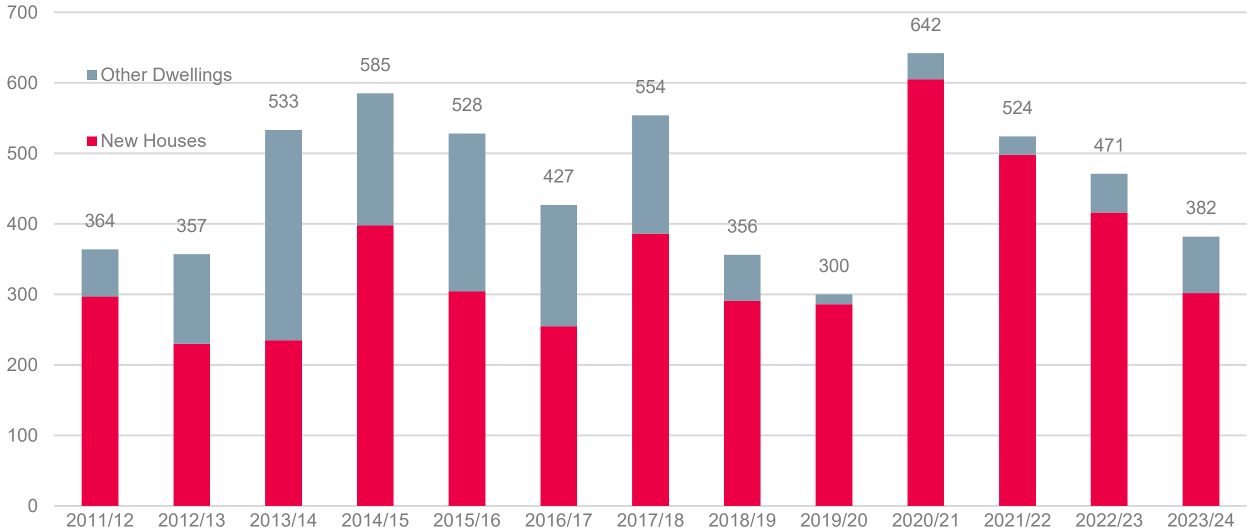
*Sources : ABS; QGSO*

CHART 2.1. COMBINED PRIMARY SECTORS NEW DWELLING APPROVALS (2011/12 – 2023/24)



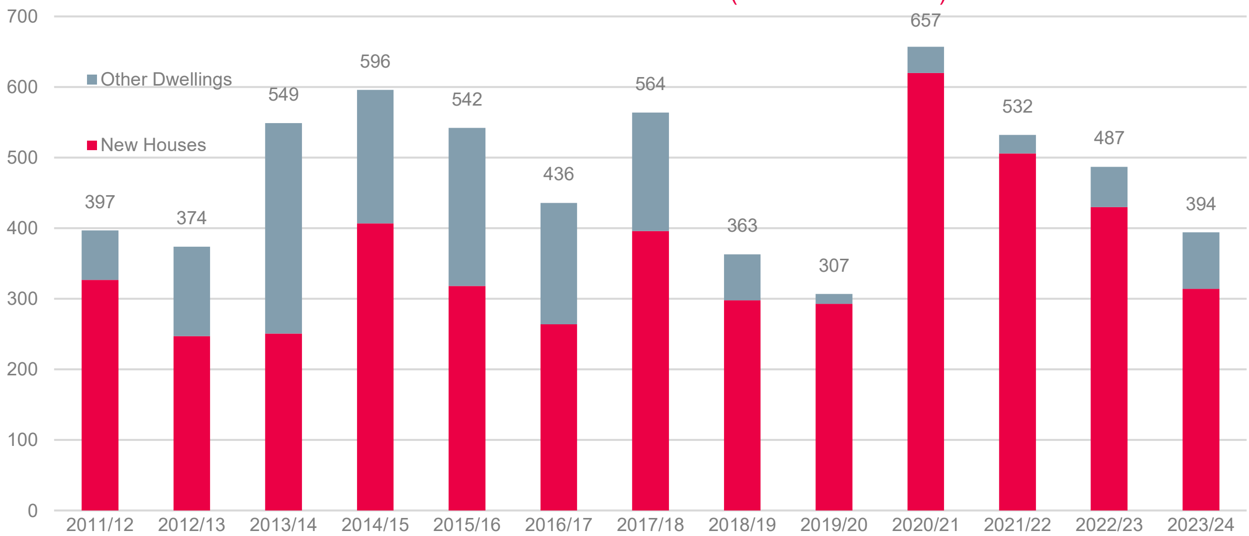

*Source: ABS*

CHART 2.2. MAIN TRADE AREA NEW DWELLING APPROVALS (2011/12 – 2023/24)




*Source: ABS*

CHART 2.3. TOTAL TRADE AREA NEW DWELLING APPROVALS (2011/12 – 2023/24)




*Source: ABS*

## 2.3. Socio-Economic Profile

i. Table 2.3 summarises the socio-economic profile of the Willows Crossing total trade area population, compared with the South East Queensland and Australian benchmarks. This information is based on the 2021 Census of Population and Housing.

ii. Key characteristics of the socio-economic profile of the Willows Crossing main trade area include:

- The average age of main trade area residents at 39.6 years is which is slightly older than the South East Queensland benchmark and in line with Australia. There is significant variance in average age within the primary sector. Residents in the primary south-east sector are significantly younger (35.0 years) compared with those in the primary west (43.2 years) which includes a number of retirement facilities.

- Average per capita income levels ($50,017) are lower than the South East Queensland average ($54,626). Residents within the primary sectors have lower incomes (25-30% below the benchmark) than those within the secondary sectors (0-10% below then benchmark).

- The proportion of Australian-born residents across the main trade area at 88.1% is higher than the South East Queensland benchmark (73.6%), reflective of the regional location of Toowoomba.

- The average household size at 2.4 persons is smaller than the South East Queensland (2.6 persons) and Australian (2.5 persons) benchmarks.

- The household structure of the main trade area predominately comprises traditional family households (i.e., couples with dependent children). There is significant variance across trade area sectors, with the primary sectors and the secondary south sector comprising a lower proportion of families and a higher proportion of lone persons. The secondary north sector has a high proportion of couples with dependent children (53.3%).

- There is a high proportion of renters in the primary sectors and secondary south sector (35-45%), whereas the secondary north and secondary east sectors have much higher home ownership with rental lower rental levels at around 10%.

iii. In summary, the socio-economic profile of the main trade area varies between lower income renters in the primary sectors and secondary south sector, and higher income families who own their own homes in the secondary east and north sector.

iv. Table 2.4 summarises the changes in the socio-economic profile of the main trade area population over the 2011-21 Census period. Key points to note are as follows:

- Main trade area income levels increased at a slightly slower rate than the South East Queensland benchmark.

- The proportion overseas-born residents increased at around double the rate of South East Queensland between 2011-21.

## TABLE 2.3. TOOWOOMBA SOCIO-ECONOMIC PROFILE, 2021 CENSUS

| Characteristic | Primary Sectors Core | Primary Sectors South-east | Primary Sectors West | Secondary Sectors East | Secondary Sectors North | Secondary Sectors South | Main TA | Tertiary Sector | Total TA | SE QLD Average | Australia Average |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **People** | | | | | | | | | | | |
| **Age Distribution (% of Pop'n)** | | | | | | | | | | | |
| Aged 0-14 | 21.7% | 22.7% | 17.7% | 19.9% | 22.2% | 17.8% | **19.5%** | 19.3% | **19.5%** | 18.5% | 18.0% |
| Aged 15-19 | 6.0% | 12.6% | 5.7% | 7.0% | 7.3% | 6.9% | **7.0%** | 6.8% | **7.0%** | 6.1% | 5.7% |
| Aged 20-29 | 14.5% | 14.0% | 12.9% | 8.6% | 8.5% | 14.4% | **12.1%** | 12.1% | **12.1%** | 13.6% | 13.3% |
| Aged 30-39 | 12.5% | 10.9% | 11.0% | 12.5% | 12.6% | 12.5% | **12.4%** | 10.4% | **12.3%** | 14.4% | 14.6% |
| Aged 40-49 | 10.5% | 10.1% | 9.4% | 13.5% | 12.9% | 11.4% | **11.8%** | 12.3% | **11.8%** | 13.4% | 13.0% |
| Aged 50-59 | 11.7% | 10.7% | 10.3% | 15.6% | 13.6% | 12.3% | **12.7%** | 12.6% | **12.7%** | 12.4% | 12.5% |
| Aged 60+ | 23.0% | 19.1% | 32.9% | 23.0% | 22.9% | 24.6% | **24.5%** | 26.5% | **24.6%** | 21.7% | 23.0% |
| Average Age | 38.1 | 35.0 | 43.2 | 39.6 | 38.6 | 39.9 | **39.6** | 40.4 | **39.6** | 38.8 | 39.5 |
| **Birthplace (% of Pop'n)** | | | | | | | | | | | |
| Australian | 89.6% | 87.0% | 88.2% | 89.6% | 91.5% | 85.8% | **88.1%** | 90.8% | **88.3%** | 73.6% | 72.0% |
| Overseas | 10.4% | 13.0% | 11.8% | 10.4% | 8.5% | 14.2% | **11.9%** | 9.2% | **11.7%** | 26.4% | 28.0% |
| • Asia | 2.1% | 1.1% | 2.9% | 1.3% | 0.7% | 3.6% | **2.4%** | 1.4% | **2.4%** | 8.3% | 12.1% |
| • Europe | 1.8% | 2.2% | 3.2% | 3.7% | 3.0% | 2.9% | **2.9%** | 2.2% | **2.9%** | 6.5% | 7.2% |
| • Other | 6.6% | 9.7% | 5.8% | 5.4% | 4.9% | 7.8% | **6.6%** | 5.5% | **6.5%** | 11.6% | 8.7% |
| **Family** | | | | | | | | | | | |
| Average Household Size | 2.5 | 2.3 | 2.3 | 2.8 | 2.9 | 2.2 | **2.4** | 2.5 | **2.4** | 2.6 | 2.5 |
| **Family Type (% of Pop'n)** | | | | | | | | | | | |
| Couple with dep't children | 33.1% | 36.4% | 29.7% | 48.8% | 53.3% | 36.2% | **41.6%** | 36.5% | **41.3%** | 44.2% | 44.2% |
| Couple with non-dep't child. | 5.2% | 5.4% | 6.0% | 9.3% | 7.4% | 5.2% | **6.2%** | 7.5% | **6.3%** | 7.0% | 7.7% |
| Couple without children | 21.0% | 22.6% | 29.0% | 26.2% | 26.7% | 25.2% | **25.8%** | 24.2% | **25.7%** | 24.4% | 23.8% |
| Single with dep't child. | 17.3% | 14.0% | 15.2% | 6.5% | 5.8% | 11.3% | **9.9%** | 15.0% | **10.2%** | 9.6% | 8.6% |
| Single with non-dep't child. | 7.0% | 5.5% | 4.8% | 3.1% | 1.7% | 4.3% | **3.6%** | 4.7% | **3.7%** | 3.8% | 4.0% |
| Other family | 1.3% | 0.8% | 1.9% | 0.4% | 0.3% | 1.3% | **1.0%** | 0.9% | **0.9%** | 1.1% | 1.0% |
| Lone person | 15.2% | 15.3% | 13.5% | 5.7% | 4.8% | 16.6% | **11.9%** | 11.3% | **11.9%** | 10.0% | 10.8% |
| **Employment** | | | | | | | | | | | |
| **Income Levels** | | | | | | | | | | | |
| Average Per Capita Income | $37,514 | $40,408 | $41,114 | $53,902 | $54,516 | $49,994 | **$50,017** | $41,929 | **$49,529** | $54,626 | $55,301 |
| Per Capita Income Variation | -31.3% | -26.0% | -24.7% | -1.3% | -0.2% | -8.5% | **-8.4%** | -23.2% | **-9.3%** | n.a. | n.a. |
| Average Household Income | $68,133 | $80,839 | $75,831 | $118,277 | $119,699 | $89,860 | **$96,476** | $80,559 | **$95,555** | $109,843 | $109,594 |
| Household Income Variation | -38.0% | -26.4% | -31.0% | 7.7% | 9.0% | -18.2% | **-12.2%** | -26.7% | **-13.0%** | n.a. | n.a. |
| **Housing** | | | | | | | | | | | |
| **Tenure Type (% of Dwellings)** | | | | | | | | | | | |
| Owned | 50.8% | 57.4% | 63.2% | 90.6% | 85.7% | 57.8% | **67.2%** | 64.6% | **67.0%** | 64.6% | 67.4% |
| Rented | 47.1% | 42.2% | 35.5% | 9.1% | 13.4% | 41.0% | **31.7%** | 34.0% | **31.9%** | 33.9% | 30.8% |
| Other Tenure Type | 2.1% | 0.5% | 1.3% | 0.3% | 0.9% | 1.1% | **1.1%** | 1.3% | **1.1%** | 1.5% | 1.8% |

*Sources: ABS Census of Population and Housing 2021*

TABLE 2.4. TOOWOOMBA SOCIO-ECONOMIC PROFILE CHANGES, 2011 – 2021 CENSUS

| Characteristic | GWF Toowoomba Main Trade Area 2011 | 2016 | 2021 | Change (%) 2011-16 | 2016-21 | 2011-21 | SE QLD 2011 | 2016 | 2021 | Change (%) 2011-16 | 2016-21 | 2011-21 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **People** | | | | | | | | | | | | |
| Average Age | 37.1 | 38.5 | 39.6 | *0.8%* | *0.5%* | *0.7%* | 37.1 | 38.0 | 38.8 | *0.5%* | *0.5%* | *0.5%* |
| **Birthplace (% of Pop'n)** | | | | | | | | | | | | |
| Australian | 90.0% | 91.0% | 88.1% | *1.0%* | *-2.9%* | *-1.9%* | 74.6% | 74.3% | 73.6% | *-0.3%* | *-0.7%* | *-0.9%* |
| Overseas | 10.0% | 9.0% | 11.9% | *-1.0%* | *2.9%* | *1.9%* | 25.4% | 25.7% | 26.4% | *0.3%* | *0.7%* | *0.9%* |
| • Asia | 1.4% | 1.7% | 2.4% | *0.3%* | *0.7%* | *1.0%* | 5.2% | 7.3% | 8.3% | *2.1%* | *1.0%* | *3.0%* |
| • Europe | 4.0% | 3.1% | 2.9% | *-0.9%* | *-0.2%* | *-1.0%* | 8.2% | 7.1% | 6.5% | *-1.2%* | *-0.6%* | *-1.7%* |
| • Other | 4.6% | 4.2% | 6.6% | *-0.5%* | *2.4%* | *1.9%* | 12.0% | 11.3% | 11.6% | *-0.6%* | *0.3%* | *-0.4%* |
| **Family** | | | | | | | | | | | | |
| Average Household Size | 2.5 | 2.4 | 2.4 | *-0.5%* | *0.0%* | *-0.2%* | 2.6 | 2.6 | 2.6 | *-0.2%* | *-0.1%* | *-0.2%* |
| **Family Type (% of Pop'n)** | | | | | | | | | | | | |
| Couple with dep't children | 44.2% | 42.4% | 41.6% | *-1.7%* | *-0.8%* | *-2.6%* | 45.5% | 45.2% | 44.2% | *-0.2%* | *-1.0%* | *-1.3%* |
| Couple with non-dep't child. | 6.4% | 6.9% | 6.2% | *0.5%* | *-0.6%* | *-0.1%* | 7.0% | 7.2% | 7.0% | *0.3%* | *-0.2%* | *0.0%* |
| Couple without children | 23.9% | 24.9% | 25.8% | *1.0%* | *0.9%* | *1.9%* | 23.9% | 23.7% | 24.4% | *-0.1%* | *0.6%* | *0.5%* |
| Single with dep't child. | 10.7% | 10.1% | 9.9% | *-0.6%* | *-0.2%* | *-0.8%* | 9.7% | 9.6% | 9.6% | *-0.1%* | *-0.1%* | *-0.2%* |
| Single with non-dep't child. | 3.0% | 3.3% | 3.6% | *0.4%* | *0.3%* | *0.6%* | 3.4% | 3.7% | 3.8% | *0.3%* | *0.2%* | *0.4%* |
| Other family | 1.0% | 1.0% | 1.0% | *0.0%* | *-0.1%* | *0.0%* | 1.2% | 1.1% | 1.1% | *-0.1%* | *0.0%* | *-0.1%* |
| Lone person | 10.9% | 11.3% | 11.9% | *0.4%* | *0.6%* | *1.0%* | 9.4% | 9.4% | 10.0% | *0.0%* | *0.6%* | *0.6%* |
| **Employment** | | | | | | | | | | | | |
| **Income Levels** | | | | | | | | | | | | |
| Average Per Capita Income | $36,819 | $43,726 | $50,017 | *3.5%* | *2.7%* | *3.1%* | $39,894 | $46,127 | $54,626 | *2.9%* | *3.4%* | *3.2%* |
| Per Capita Income Variation | -7.7% | -5.2% | -8.4% | *2.5%* | *-3.2%* | *-0.7%* | n.a. | n.a. | n.a. | *n.a.* | *n.a.* | *n.a.* |
| Average Household Income | $70,514 | $83,704 | $96,476 | *3.5%* | *2.9%* | *3.2%* | $81,426 | $94,097 | $109,843 | *2.9%* | *3.1%* | *3.0%* |
| Household Income Variation | -13.4% | -11.0% | -12.2% | *2.4%* | *-1.1%* | *1.2%* | n.a. | n.a. | n.a. | *n.a.* | *n.a.* | *n.a.* |

*Source: ABS Census of Population and Housing 2011, 2016 & 2021*

*higher | lower than benchmark*

## 2.4. Workers

i. Information in this sub-section is based on Journey to Work data released by the ABS (2021 Census of Population and Housing), which presents a profile of the workforce within the defined region.

ii. The worker catchment includes the employment areas immediately around the Willows Crossing site. Map 2.3 shows the relevant worker catchment area, for the Willows Crossing development.

iii. As at the 2021 Census there were total of 1,240 workers within the worker catchment area, Table 2.5 details the projected worker population over the period to 2041. The worker population is projected to increase by 2,600 persons to 3,990 workers in 2041.

iv. Based on the new Toowoomba Hospital planned for opening in late-2027, it is expected that there will be more than 1,000 additional staff on the Baillie Henderson campus.

v. Exact plans for the new Toowoomba Hospital have not been finalised. Should the entire existing Toowoomba Hospital relocated to the Baille Henderson campus, staff numbers could be in the order of 3,000, with an additional 1,000 students. For the purposes of this report, 1,000 people are assumed to work at the new Toowoomba Hospital.

vi. Table 2.6 key characteristics of workers within the defined worker trade area.

vii. Workers in the surrounding area will add to demand for retail and non-retail facilities at the Willows Crossing site.

viii. To identify the spending patterns of the worker population, resident spending patterns within a 10 km radius of the site have been used as a proxy. It is assumed that the workers within the locality generally live within 10 km of their place of work.

ix. It is important to note that a proportion of this market is likely to be a sub-set of the residential spending market, as some workers would live within the resident trade area. However, residents who both live and work within the worker catchment area would have the opportunity to use the retail facilities at the site more regularly than if they worked elsewhere.

x. Typically, it is estimated that 15% - 20% of workers expenditure will be directed to retail facilities near their place of work. In this instance, the amount of retail expenditure directed to retail facilities within and immediately beyond the worker catchment area would be in the order of $3.7 - $4.9 million in 2024, this is expected to increase to around $15 - $20.0 million by 2041.

## TABLE 2.5. WORKER TRADE AREA POPULATION, 2011 – 2041

| Population | Actual 2011 | Actual 2016 | Actual 2021 | Forecast 2024 | Forecast 2026 | Forecast 2031 | Forecast 2036 | Forecast 2041 | *Change 2024-41* |
|---|---|---|---|---|---|---|---|---|---|
| Worker Trade Area | 640 | 900 | 1,240 | 1,390 | 1,490 | 2,490 | 3,490 | 3,990 | *2,600* |
| **Average Annual Change (No.)** | | **Actual 2011-16** | **Actual 2016-21** | **Forecast 2021-24** | **Forecast 2024-26** | **Forecast 2026-31** | **Forecast 2031-36** | **Forecast 2036-41** | ***Change 2024-41*** |
| Worker Trade Area | | 52 | 68 | 50 | 50 | 200 | 200 | 100 | *153* |
| **Average Annual Change (%)** | | **Actual 2011-16** | **Actual 2016-21** | **Forecast 2021-24** | **Forecast 2024-26** | **Forecast 2026-31** | **Forecast 2031-36** | **Forecast 2036-41** | ***Change 2024-41*** |
| Worker Trade Area | | 7.1% | 6.6% | 3.9% | 3.5% | 10.8% | 7.0% | 2.7% | *6.4%* |

*All figures as at June and based on 2021 Journey To Work Travel Zones.*

*Sources : ABS; DLGP QLD*

## TABLE 2.6. KEY CHARACTERISTICS OF WORKER TRADE AREA POPULATION

| Characteristics | Main TA | Worker - Brisb Metro* Average |
|---|---|---|
| **Socio-economic Profile** | | |
| Population (2021) | 1,240 | 1,194,091 |
| Male (%) | 40.3% | 50.0% |
| Female (%) | 59.7% | 50.0% |
| Average Age | 44.6 | 40.3 |
| **Annual Income (%)** | | |
| Average Income | $77,063 | $75,578 |
| **Industry Split** | | |
| White Collar Workers (%) | 74.9% | 72.6% |
| Blue Collar Workers (%) | 23.7% | 25.6% |
| Other (%) | 1.5% | 1.8% |
| **Transport (%)** | | |
| One Method | | |
| • Car, as driver | 77.1% | 55.1% |
| • Car, as passenger | 3.2% | 4.1% |
| • Other One Method | 2.7% | 11.6% |
| Total One Method | 83.0% | 70.8% |
| Worked at home | 6.5% | 18.0% |
| Did not go to work | 10.3% | 10.9% |
| **Retail Expenditure (2024)**** | | |
| Est Retail Expenditure Per Capita ($) | $18,008.9 | n.a. |
| Total Worker Retail Expenditure ($M) | $24.6 | n.a. |
| Retail Expenditure Near Place of Work (15%-20%) | $3.7M - $4.9M | n.a. |

**Based on 2021 Census*

***Source : CommBank iQ, Location iQ & based on 10 km resident spend market as a proxy*

*Sources: ABS Census of Population and Housing 2021*

# 3 Assessment of Retail Potential

This section of the report assesses the potential for retail floorspace as part of the planned Willows Crossing development.

## 3.1. Proposed Development

i. The Willows Crossing development is planned to include retail floorspace of 7,800 sq.m, with a small supermarket (1,800 sq.m), retail speciality shops of 1,000 sq.m (~10 - 15 shops) and 5,000 sq.m of large format retail/showrooms.

ii. The traditional retail component (Crossing Central) of the development will be positioned centrally within the site with the medical/professional precinct and accommodation to the immediate north. An ingress and egress point will be provided at Crossing Central. Other key points to note include:

- Crossing Central allows convenience retail, offices, food and drink outlets, and community services to serve a neighbourhood-to-district-level catchment, including nearby residential areas and the hospital precinct.
- Crossing Central is intended to support, rather than compete with, higher-order centres.
- Buildings are required to offer a pedestrian-friendly environment, incorporate public spaces, and promote sustainable transport, enhancing local access without undermining larger commercial centres.

iii. The large format retail component (commercial retail services) of the development will be positioned south of Crossing Central fronting Mort Street. An ingress and egress point will be provided at Griffith Street to the south as well as at Crossing Central. Other key points to note include:

- Commercial Retail Services precinct is reserved for large-format retail uses, such as bulky goods, showrooms, and trade supplies.
- The goal is to ensure that the precinct supports large-scale retail needs without encroaching on the roles of higher-order centres, maintaining clear distinctions between retail hierarchies.
- The development of smaller business activities is limited to supporting the primary retail functions to prevent an overlap with nearby commercial zones.

iv. Overall, the proposed traditional retail and large format retail components of the Willows Crossing development, are planned to support the existing retail hierarchy within the region whilst providing improved choice and convenience for local residents and workers.

# 3.2. Supply

## 3.2.1. Traditional Retail

i. The key retail facilities provided throughout the total trade area and surrounding region are illustrated on Map 3.1, with the composition of these facilities summarised in Table 3.1.

ii. Key shopping centres and supermarkets within 5 km (by road) include:

- **North Toowoomba** (3.7 km south, secondary south sector) includes **Northpoint Shopping Centre** (6,000 sq.m) which is anchored by Coles and Aldi supermarket. The centre also provides The Reject Shop.

- **Wilsonton Shopping Centre** (secondary south sector), 4.8 km to the south-west, totals 18,250 sq.m and includes full-line Woolworths and Coles supermarkets. Wilsonton Shopping Centre also comprises one mini-major and some 25 specialty tenants.

- The **Toowoomba City Centre** (secondary south sector), 5.0 km to the south, is anchored by **Grand Central**, which is the largest shopping centre in Toowoomba at some 90,150 sq.m. Major tenants include a Myer department store, Kmart, Big W and Target discount department stores and Woolworths and Coles supermarkets, complemented by a range of mini-major and specialty tenants. The shopping centre also contains an Event Cinemas complex. Elsewhere within the Toowoomba City Centre, a range of specialty shops and other facilities are focused along Margaret Street and Ruthven Street.

- **Clifford Gardens Shopping Centre** (secondary south sector) is a sub-regional shopping centre, 5.8 km south and totals 28,750 sq.m. The shopping centre is anchored by a Big W discount department store, as well as full-line Woolworths and Coles supermarkets.

iii. There are several proposed retail facilities within the total trade area. These include:

**Secondary South**

- At 4-6 Isaac Street, a development application has been submitted **for North Toowoomba Neighbourhood Shopping Centre** which is proposed to include a 3,400 sq.m Woolworths supermarket, 900 sq.m of specialty retail tenancies, a 200 sq.m drive thru fast food outlet and a service station with eight refuelling points.

- At 1A & 3A Neil Street, the former gas works site was approved for redevelopment in September 2024, and will include a 10-storey mixed-use development, incorporating residential apartments, as well as a 4,293 sq.m **Fresh & Save supermarket** and up to 1,746 sq.m of specialty retail space.

- At 10804 – 10806 Warrego Highway, in **Charlton** the existing Bronco Motel is set to be demolished, and will be replaced by a mixed-use development which has been approved for development and includes a shopping centre, tavern, liquor barn and drive-thru fast food outlet. The shopping centre will total some 2,699 sq.m and will incorporate a supermarket of 2,199 sq.m and retail specialty tenancies of 500 sq.m.

**Secondary North**

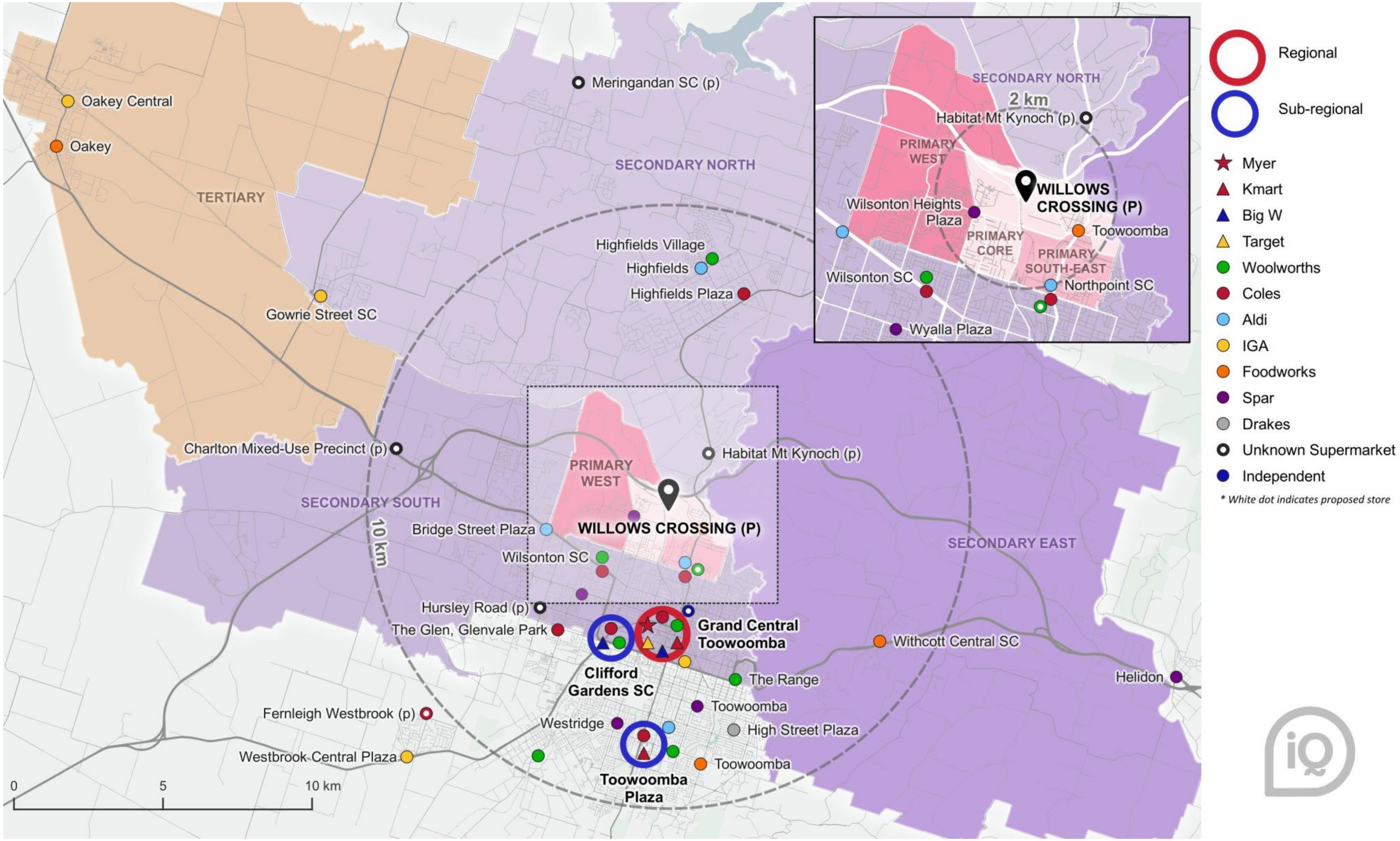
- At 1 – 5 New England Highway, a mixed-use development (**Habitat Mt Kynoch**) over two buildings is approved for development and will include a 1,567 sq.m supermarket, as well as five café/restaurant tenancies.
- Woolworths at **Highfields Village** is set to undergo an estimated $2 million refurbishment.

TABLE 3.1. WILLOWS CROSSING RETAIL COMPETITION

| Centre | Shopfront GLA (sq.m) | Anchor Tenants | Dist. From Site (km) |
|---|---|---|---|
| **Regional Shopping Centres** | | | |
| Toowoomba CBA | 145,700 | | 5.0 |
| • Grand Central Toowoomba | 90,100 | Myer (16,000), Target (7,000), Kmart (6,300), Big W (6,250), Woolworths (4,250), Coles (3,550) | |
| • Hopper Centre | 5,500 | IGA (1,200) | |
| • Other | 50,000 | | |
| **Sub-regional Shopping Centres** | | | |
| Newtown | 37,500 | | 5.8 |
| • Clifford Gardens SC | 28,800 | Big W (8,190), Woolworths (4,560), Coles (3,975) | |
| • Wyalla Plaza | 5,700 | Spar (400) | |
| • Other | 3,000 | | |
| **Supermarket Based Shopping Centres** | | | |
| Wilsonton Heights Plaza | 1,200 | Spar (350) | 2.0 |
| Harlaxton | 500 | Foodworks (350) | 2.4 |
| North Toowoomba | 13,500 | | 3.3 |
| • Northpoint Shopping Centre | 6,000 | Coles (3,700), Aldi (1,600) | |
| • Other | 7,500 | | |
| Wilsonton Shopping Centre | 18,300 | Coles (3,550), Woolworths (3,400) | 4.6 |
| Bridge Street Plaza | 3,300 | Aldi (1,650) | 6.3 |
| East Toowoomba | 9,600 | | 7.7 |
| • The Range | 6,100 | Woolworths (3,300) | |
| • Other | 3,500 | | |
| Highfields | 14,600 | | 13.2 |
| • Highfields Village | 7,300 | Woolworths (3,900) | |
| • Highfields Plaza | 4,800 | Coles (3,150) | |
| • Other | 2,500 | Aldi (1,750) | |
| Withcott Central | 1,500 | Foodworks (500) | 13.7 |
| Gowrie Street Shopping Centre | 1,500 | IGA (800) | 19.2 |
| Oakey | 8,200 | | 29.0 |
| • Oakey Central | 3,200 | IGA (2,300) | |
| • Other | 5,000 | Foodworks (600) | |

*Source: Location iQ*

MAP 3.1. WILLOWS CROSSING TOTAL TRADE AREA AND RETAIL COMPETITION



### 3.2.2. Large Format Retail

i. Large format retailing has evolved in recent years in Australia and incorporates bulky goods and retail showroom uses. Large format retailing includes a range of categories, but generally covers items of a bulky nature that require a large area for handling, display or storage, or direct vehicle access for loading.

ii. Large format retail centres typically serve broad geographic trade areas due to infrequent purchase habits. In recent times, the tenants looking to locate in bulky goods/large format areas has expanded, given that retail tenants such as sporting goods, toy stores, camping equipment, etc. trade in a similar manner, attracting low market shares across broad regions.

iii. Consequently, 'retail showroom' and mini-major tenants (retail tenants with floorspace of 400 sq.m or greater) are suited to locations like bulky goods centres, which are typically in extremely high profile, main road locations and, therefore, receive excellent exposure to passing traffic and are easily accessible from both a local and regional perspective.

iv. The co-location of facilities in a single centre or precinct generally results in a benefit to the consumer as well, with customers preferring to cross-shop, to compare prices and products more easily. This has been an increasing trend within the Australian retail environment.

v. Large format retail/homemaker centres, as an asset class, have experienced significant growth over the past decade with the population and housing boom in Australia.

iv. Large format retail/homemaker expenditure is defined to include categories such as:

- Outdoor Furniture and BBQ Stores
- Household Appliance Stores
- Computer and Electronic Stores
- Windows, Doors and Lighting Stores
- Hardware and Home Maintenance Supplies
- Furniture Stores
- Home Decoration
- Baby Goods Stores
- Manchester Stores
- Outdoor Adventure
- Sporting Goods Stores
- Motor Vehicle Accessories
- Pet Stores
- Toy Stores

v. Map 3.2 illustrates the locations of large format retailers across the total trade area.

vi. As shown, the existing support of large format retail/showroom facilities are concentrated around North Toowoomba, South Toowoomba and Kearneys Springs.

vii. There are no major large format retail tenants within the combined primary sectors. Within the total trade area there is currently 48,800 sq.m of large format retail floorspace the majority of this floorspace is provided in the secondary south sector within the Toowoomba CBA and immediately surrounding suburbs such as North Toowoomba and Toowoomba West. National brands within the total trade area include Bunnings, Fantastic Furniture, Lincraft, Petbarn, Pets Domain, Petstock, Mitre 10, Reece Plumbing and more.

viii. Beyond the total trade area, the Harvey Norman Centre and HomeCo Toowoomba at Kearneys Spring, include major national brands such as Harvey Norman, The Good Guys, Spotlight, Snooze, Anaconda and Amart Furniture.

ix. A development application has been approved for a mixed-use development to the immediate north of the site that includes a service station and fast food outlet as part of stage one and eight large format retail/showroom tenancies (7,395 sq.m) as part of stage two. It is understood that this site is currently for sale.

x. The development of two small showrooms totalling 800 sq.m has also been approved within the secondary south sector, as part of the existing Bunnings Warehouse development along Ruthven Street.

MAP 3.2. WILLOWS CROSSING LARGE FORMAT RETAIL

# 3.3. Demand

i. In Australia, there is around 2.3 sq.m of retail floorspace provided for every resident. This is the generally accepted standard provision used throughout the Australian retail industry, with the last Retail Census undertaken by the ABS in 1991/92. Of this 2.3 sq.m, approximately 30% is estimated to be large format retail floorspace, or 0.6 – 0.7 sq.m of large format retail floorspace per person.

## 3.3.1. Traditional Retail

i. Traditional retail floorspace (i.e. excluding large format retail) is generally provided at a rate of 1.5 sq.m per person on average across Australia.

ii. Table 3.2 outlines the estimated current traditional retail floorspace demanded by the total primary sector, main trade area and total trade area residents and the likely growth in demand over the period to 2041. There is currently an estimated 86,328 persons in the total trade area, 81,118 persons residing in the main trade area, and 12,131 in the combined primary sectors.

iii. Based on the average retail floorspace provision of 1.5 sq.m per person, over 120,000 sq.m of traditional retail floorspace is currently demanded across the total trade area and 18,000 within the combined primary sectors. Over the period to 2041, some 168,000 of retail floorspace will be demanded by total trade area residents, including 23,000 sq.m within the combined primary sectors.

iv. There is currently limited retail floorspace provided within the combined primary sectors (refer previous Map 3.1). There are two small convenience-based food stores located at Harlaxton (Foodworks of 350 sq.m) and Wilsonton Heights (Spar of 300 sq.m) both of which are provided within 3 km of the Willows Crossing site. Northpoint Shopping Centre is provided on the edge of the combined primary sectors and is anchored by Coles and Aldi supermarkets. Overall, the provision of retail floorspace within the combined primary sectors is in the order of 10,400 sq.m, around 8,000 sq.m lower than demanded.

v. The total trade area and main trade area indicate an oversupply of retail floorspace as higher order retail centres such as Grand Central and Clifford Central are located within the secondary south sector. Consequently, residents have to travel to retail facilities beyond the combined primary sectors to satiate demand.

vi. Generally, one full-line supermarket of 3,000 sq.m and larger is supportable for every 8,000 – 10,000 persons in established areas. A population of around 6,000 persons (as a minimum benchmark) is required, assuming population growth over future years. Smaller format supermarkets typically require a catchment population of ~3,000 – 4,000 persons — again, with strong population growth in the imminent future, a population at the lower end of the range is supportable.

vii. At 1,800 sq.m in size, the proposed Willows Crossing supermarket would serve a more localised catchment population and not provide the full range of products. Typically, operators for supermarkets of this size include Aldi, IGA, Drakes, Foodworks, and the like. As a guide, an Aldi supermarket is typically 1,750 sq.m in size.

viii. Supermarkets are typically defined in planning documents and Courts as:

> *“Grocery and dry goods stores of at least 500 sq.m, with smaller stores classified as foodstores.”*

ix. The proposed supermarket is planned to be developed with 1,000 sq.m of retail specialty shops, as well as large format retail/showroom floorspace, providing increased convenience and choice for local residents and workers.

x. Willows Crossing is planned to include 2,800 sq.m of traditional retail floorspace, which will account for only 22.7% of the projected total primary sector shortfall in floorspace (2041) and 62% of the projected growth in retail demand (+4,515 sq.m) over the period to 2041.

xi. Charts 3.1 - 3.3 illustrate the retail spending levels per person across the primary sector, main trade area and total trade area, compared with the South East Queensland averages in 2023/24. Retail spending is slightly lower than comparable South East Queensland averages, with the exception of supermarkets and a range of non-food based categories such as household goods, leisure and general retail.

xii. Table 3.3 outlines total retail expenditure levels generated by the total trade area population. Total retail expenditure is currently estimated at $1.6 billion and is projected to increase at an average rate of 2.3% to $2.3 billion by 2041. All figures presented in this report are in constant dollars and include GST.

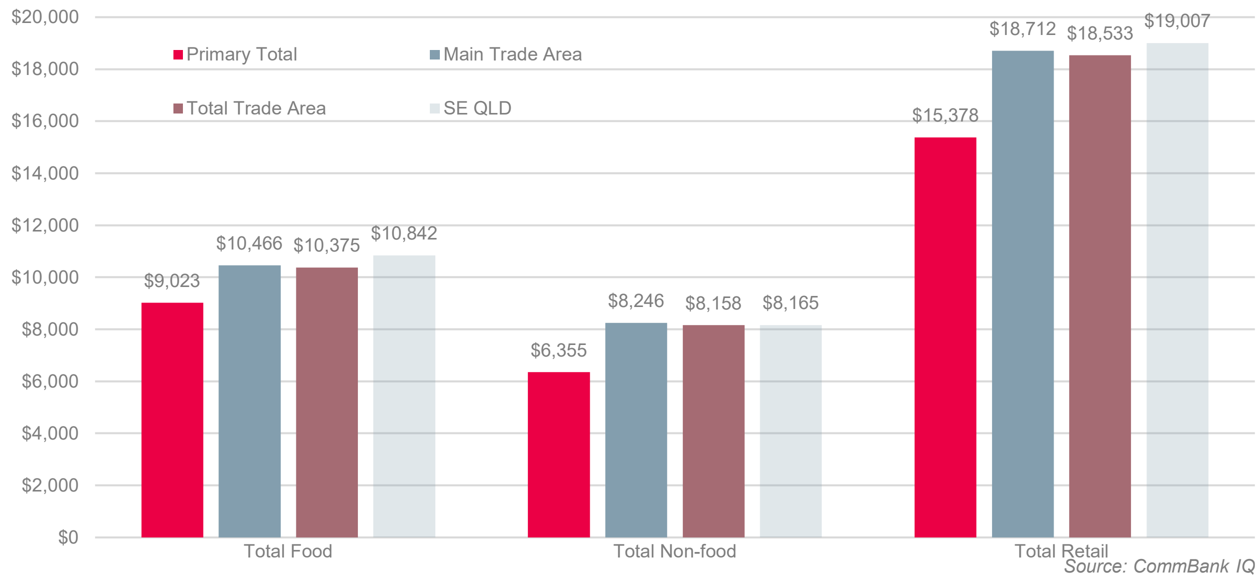
xiii. Table 3.4 details the total trade area retail expenditure generated by key commodity group. The largest spending market is food catering at $442.3 million, or 27.9% of the total retail spending market.

## TABLE 3.2. WILLOWS CROSSING TRADITIONAL RETAIL FLOORSPACE SUPPLY AND DEMAND

| | Current | Projected | | | | Diff. |
|---|---|---|---|---|---|---|
| | 2024 | 2026 | 2031 | 2036 | 2041 | 2024-41 |
| **Population** | | | | | | |
| Total Primary Sectors | 12,131 | 12,291 | 13,491 | 14,691 | 15,141 | 3,010 |
| Main Trade Area | 81,118 | 83,378 | 91,078 | 99,028 | 106,978 | 25,860 |
| Total Trade Area | 86,328 | 88,628 | 96,428 | 104,478 | 112,528 | 26,200 |
| **Traditional Retail Floorspace Demand (@ 1.5 sq.m per person)** | | | | | | |
| Total Primary Sectors | 18,197 | 18,437 | 20,237 | 22,037 | 22,712 | 4,515 |
| Main Trade Area | 121,677 | 125,067 | 136,617 | 148,542 | 160,467 | 38,790 |
| Total Trade Area | 129,492 | 132,942 | 144,642 | 156,717 | 168,792 | 39,300 |
| **Estimated Traditional Retail Supply** | | | | | | |
| Total Primary Sectors | 10,400 | 10,400 | 10,400 | 10,400 | 10,400 | |
| Main Trade Area | 200,036 | 200,036 | 210,341 | 210,341 | 210,341 | |
| Total Trade Area | 203,236 | 203,236 | 213,541 | 213,541 | 213,541 | |
| **Traditional Retail Floorspace Over/Under Supply** | | | | | | |
| Total Primary Sectors | -7,797 | -8,037 | -9,837 | -11,637 | -12,312 | |
| Main Trade Area | 78,359 | 74,969 | 73,724 | 61,799 | 49,874 | |
| Total Trade Area | 73,744 | 70,294 | 68,899 | 56,824 | 44,749 | |

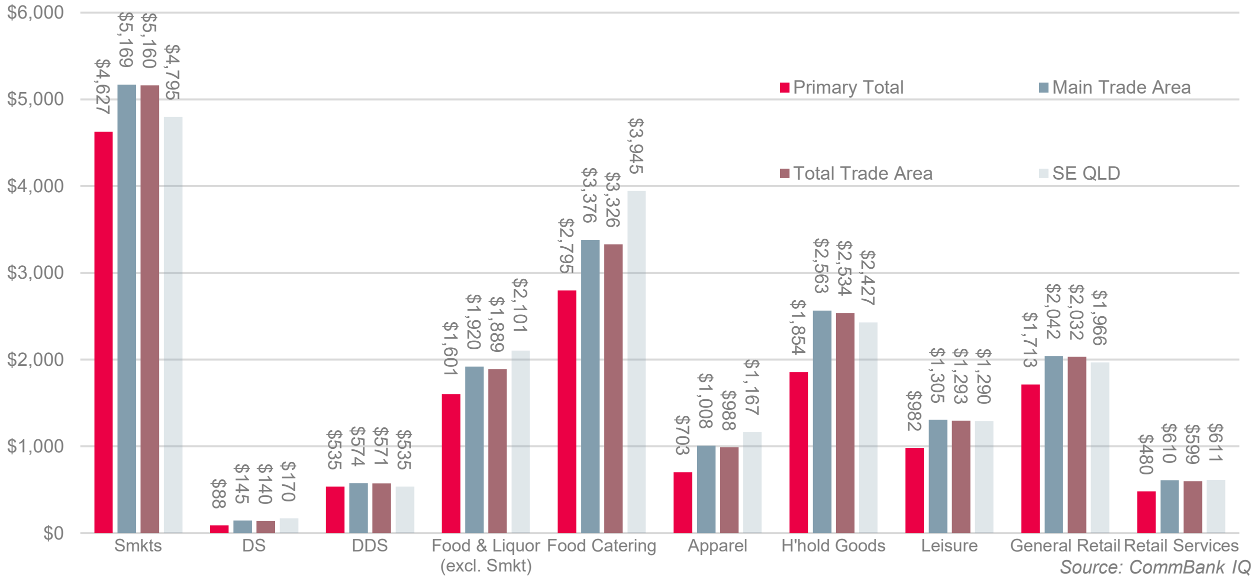
*Over/Under Supplied*

## CHART 3.1. RETAIL EXPENDITURE PER CAPITA, 2023/24




*Source: CommBank IQ*

## CHART 3.2. RETAIL EXPENDITURE BY CATEGORY PER CAPITA, 2023/24




*Source: CommBank IQ*

## CHART 3.3. MTA PER CAPITA RETAIL SPENDING VARIATION FROM BENCHMARK, 2023/24


*Source: CommBank IQ*

TABLE 3.3. TOTAL TRADE AREA RETAIL EXPENDITURE, 2024 – 2041

| **Y/E June** | **Primary Sectors** Core | South-east | West | **Secondary Sectors** East | North | South | **Main TA** | **Tertiary Sectors** | **Total TA** |
|---|---|---|---|---|---|---|---|---|---|
| 2024 | 53.4 | 29.9 | 102.7 | 124.6 | 484.3 | 711.3 | **1,506.2** | 81.7 | **1,587.9** |
| 2026 | 53.7 | 30.5 | 104.2 | 126.8 | 510.9 | 723.7 | **1,549.7** | 82.3 | **1,632.1** |
| 2029 | 62.1 | 32.2 | 107.8 | 138.4 | 565.3 | 765.2 | **1,671.1** | 85.2 | **1,756.3** |
| 2031 | 69.6 | 33.4 | 110.2 | 147.5 | 604.7 | 794.7 | **1,760.1** | 87.2 | **1,847.3** |
| 2036 | 88.5 | 36.5 | 116.2 | 176.2 | 706.2 | 871.6 | **1,995.1** | 92.4 | **2,087.5** |
| 2041 | 97.6 | 39.8 | 122.5 | 218.4 | 815.1 | 958.1 | **2,251.4** | 97.8 | **2,349.3** |
| **Expenditure Growth** | | | | | | | | | |
| 2024-41 | 44.3 | 9.9 | 19.9 | 93.8 | 330.7 | 246.7 | **745.2** | 16.1 | **761.3** |
| **Average Annual Growth Rate** | | | | | | | | | |
| 2024-41 | 3.6% | 1.7% | 1.0% | 3.4% | 3.1% | 1.8% | **2.4%** | 1.1% | **2.3%** |

**Constant 2023/24 dollars & including GST*
*Source : CommBank iQ, Location iQ*

TABLE 3.4. TOTAL TRADE AREA RETAIL EXPENDITURE BY KEY COMMODITY GROUP, 2024 – 2041

| **Y/E June** | **Supermarket** | **Department Store** | **Discount Dept Store** | **Food & Liquor** | **Food Catering** | **Apparel** | **H'hold Goods** | **Leisure** | **General Retail** | **Retail Services** |
|---|---|---|---|---|---|---|---|---|---|---|
| 2024 | 442.3 | 12.0 | 49.0 | 161.8 | 285.0 | 84.6 | 217.0 | 110.8 | 174.1 | 51.3 |
| 2026 | 454.7 | 12.4 | 50.3 | 166.2 | 292.6 | 86.9 | 223.4 | 113.8 | 179.0 | 52.8 |
| 2029 | 485.2 | 13.2 | 53.6 | 177.3 | 316.4 | 94.0 | 242.3 | 123.2 | 194.0 | 57.1 |
| 2031 | 507.5 | 13.8 | 56.0 | 185.3 | 333.8 | 99.3 | 256.3 | 130.1 | 205.0 | 60.3 |
| 2036 | 565.2 | 15.3 | 62.2 | 206.2 | 380.2 | 113.2 | 293.5 | 148.4 | 234.3 | 68.9 |
| 2041 | 626.3 | 17.0 | 68.8 | 228.6 | 431.2 | 128.7 | 335.0 | 168.7 | 266.6 | 78.2 |
| **Expenditure Growth** | | | | | | | | | | |
| 2024-41 | 184.0 | 5.0 | 19.8 | 66.8 | 146.3 | 44.1 | 118.0 | 57.9 | 92.5 | 26.9 |
| **Average Annual Growth Rate** | | | | | | | | | | |
| 2024-41 | 2.1% | 2.1% | 2.0% | 2.1% | 2.5% | 2.5% | 2.6% | 2.5% | 2.5% | 2.5% |

**Constant 2023/24 dollars & including GST*
*Source : CommBank iQ, Location iQ*

## 3.3.2. Large Format Retail

i. The demand for large format retail floorspace in Australia is around 0.6 - 0.7 sq.m per person. For new residential growth areas, the demand for large format retail floorspace is typically strong and would likely be closer to 0.7 sq.m per resident.

ii. This indicates demand for up to 60,400 sq.m of large format retail within the total trade area currently, increasing to ~78,800 sq.m by 2041 (refer Table 3.5).

iii. Based on the existing supply of large format retail, the total trade area is currently undersupplied by ~11,600 sq.m, increasing to over 29,170 sq.m in 2041.

iv. This analysis assumes a closed catchment where demand escaping the total trade area is equivalent to demand coming from beyond.

v. Willows Crossing is planned to include 5,000 sq.m of large format retail/showroom floorspace, which will account for only 17.1% of the projected undersupply by 2041.

vi. Chart 3.4 highlights the large format retail spend per capita by category compared to the South East Queensland benchmark.

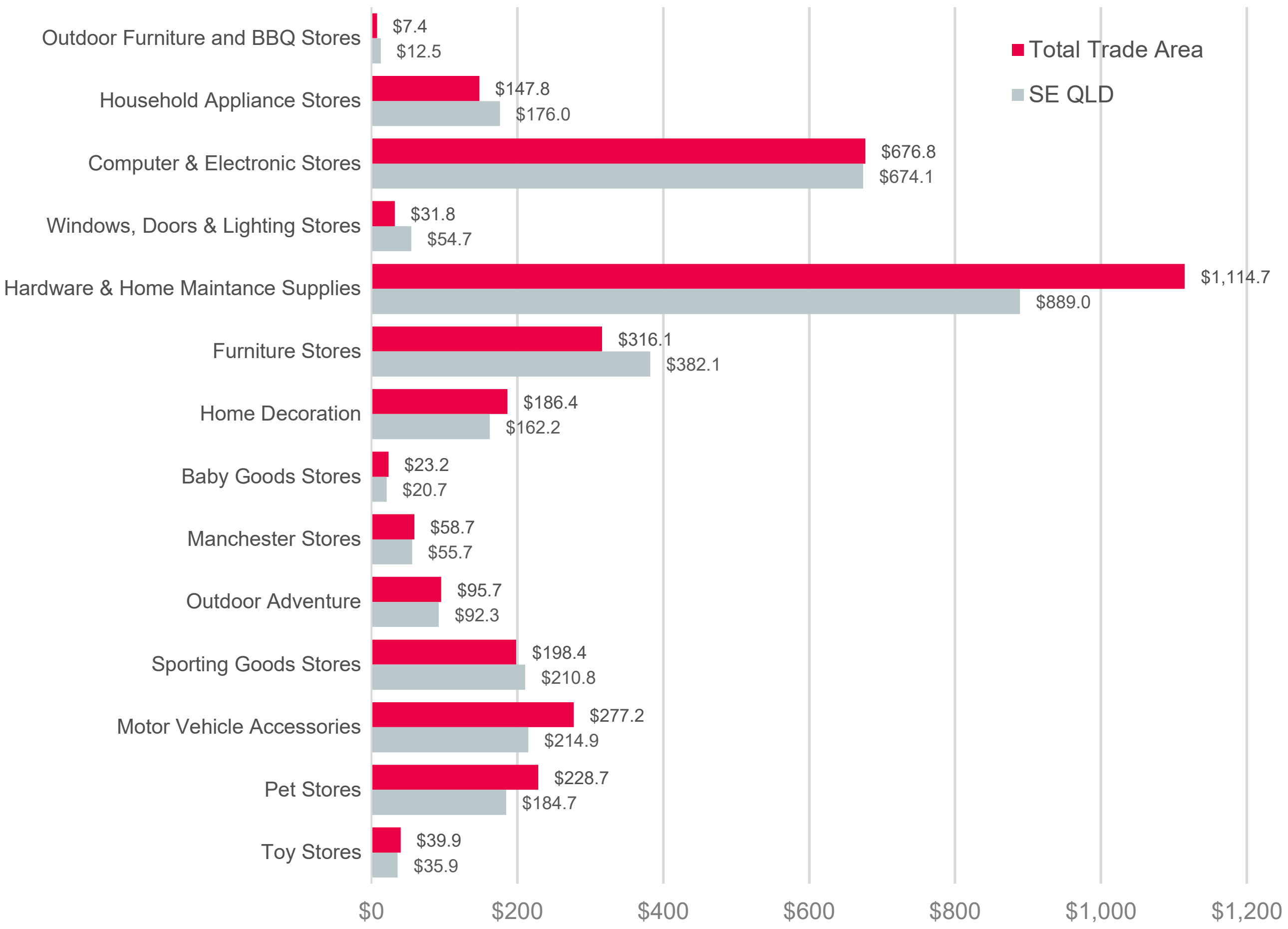
vii. Table 3.6 outlines the total level of large format retail/homemaker retail spending by trade area sector. As shown, total large format retail expenditure is currently estimated at $288.6 million and is projected to increase at an average annual growth rate of 2.6% to $445.9 million by 2041. Table 3.7 provides a breakdown of the large format retail/homemaker retail spending by category.

## TABLE 3.5. WILLOWS CROSSING LFR DEMAND, 2024 – 2041

| | Current | Projected | | | |
|---|---|---|---|---|---|
| | 2024 | 2026 | 2031 | 2036 | 2041 |
| **Trade Area Sector/s Population** | | | | | |
| Total Primary | 12,131 | 12,291 | 13,491 | 14,691 | 15,141 |
| Secondary Sectors | 68,987 | 71,087 | 77,587 | 84,337 | 91,837 |
| **Main Trade Area** | **81,118** | **83,378** | **91,078** | **99,028** | **106,978** |
| Tertiary | 5,210 | 5,250 | 5,350 | 5,450 | 5,550 |
| **Total Trade Area** | **86,328** | **88,628** | **96,428** | **104,478** | **112,528** |
| **Trade Area LFR Floorspace Demand (0.7 sq.m per person)** | | | | | |
| Total Primary | 8,492 | 8,604 | 9,444 | 10,284 | 10,599 |
| Secondary Sectors | 48,291 | 49,761 | 54,311 | 59,036 | 64,286 |
| **Main Trade Area** | **56,783** | **58,365** | **63,755** | **69,320** | **74,885** |
| Tertiary | 3,647 | 3,675 | 3,745 | 3,815 | 3,885 |
| **Total Trade Area** | **60,430** | **62,040** | **67,500** | **73,135** | **78,770** |
| *• LFR Floorspace Growth per Annum* | | *403* | *1,365* | *1,409* | *1,409* |

*Source: Location IQ*

## CHART 3.4.TOTAL TRADE AREA LARGE FORMAT RETAIL EXPENDITURE PER CAPITA, 2023/24




*Source: CBA IQ; Location IQ*

TABLE 3.6. TOTAL TRADE AREA LARGE FORMAT RETAIL EXPENDITURE, 2024 – 2041

| **Y/E June** | **Primary Sectors** Core | South-east | West | **Secondary Sectors** East | North | South | **Main TA** | Tertiary Sector | **Total TA** |
|---|---|---|---|---|---|---|---|---|---|
| 2024 | 8.4 | 4.9 | 16.2 | 27.2 | 100.0 | 117.1 | **273.7** | 14.8 | **288.6** |
| 2026 | 8.5 | 5.0 | 16.4 | 27.7 | 105.4 | 119.1 | **282.1** | 14.9 | **297.1** |
| 2029 | 9.9 | 5.3 | 17.1 | 30.4 | 117.4 | 126.7 | **306.8** | 15.6 | **322.4** |
| 2031 | 11.1 | 5.5 | 17.5 | 32.5 | 126.1 | 132.2 | **324.9** | 16.0 | **340.9** |
| 2036 | 14.3 | 6.1 | 18.7 | 39.2 | 148.8 | 146.4 | **373.5** | 17.1 | **390.6** |
| 2041 | 15.9 | 6.7 | 20.0 | 49.1 | 173.4 | 162.5 | **427.6** | 18.3 | **445.9** |
| **Expenditure Growth** | | | | | | | | | |
| 2024-41 | 7.5 | 1.8 | 3.8 | 21.9 | 73.5 | 45.4 | **153.9** | 3.5 | **157.4** |
| **Average Annual Growth Rate** | | | | | | | | | |
| 2024-41 | 3.8% | 1.9% | 1.2% | 3.5% | 3.3% | 1.9% | **2.7%** | 1.3% | **2.6%** |

**Constant 2023/24 dollars & including GST*
*Source : CBA IQ, Location IQ*

## TABLE 3.7. MAIN TRADE AREA LARGE FORMAT RETAIL EXPENDITURE BY CATEGORY, 2024 – 2041

| Y/E June | Outdoor Funiture & BBQ Stores | H'hold Appliance Stores | Computer & Electronic Stores | Windows, Doors & Lighting | Hardware Home Maintenance Supplies | Furniture Stores | Home Decoration | Baby Goods Stores | Manchester Stores | Outdoor Adventure | Sporting Goods Store | Motor Vehicle Accessories | Pet Store | Toy Store |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2024 | 0.6 | 12.5 | 56.8 | 2.6 | 95.5 | 26.5 | 15.6 | 1.9 | 4.9 | 8.1 | 16.7 | 24.0 | 19.4 | 3.3 |
| 2026 | 0.7 | 12.9 | 58.4 | 2.7 | 98.4 | 27.3 | 16.0 | 2.0 | 5.0 | 8.3 | 17.2 | 24.7 | 20.0 | 3.4 |
| 2029 | 0.7 | 13.9 | 63.4 | 3.0 | 106.8 | 29.6 | 17.3 | 2.2 | 5.4 | 9.1 | 18.7 | 26.8 | 21.7 | 3.7 |
| 2031 | 0.8 | 14.7 | 67.0 | 3.1 | 113.1 | 31.3 | 18.3 | 2.3 | 5.7 | 9.6 | 19.7 | 28.4 | 23.0 | 3.9 |
| 2036 | 0.9 | 16.8 | 76.8 | 3.6 | 129.7 | 35.7 | 20.9 | 2.6 | 6.5 | 11.0 | 22.6 | 32.5 | 26.4 | 4.5 |
| 2041 | 1.0 | 19.1 | 87.6 | 4.2 | 148.2 | 40.8 | 23.9 | 3.0 | 7.5 | 12.6 | 25.8 | 37.1 | 30.3 | 5.1 |
| **Expenditure Growth** | | | | | | | | | | | | | | |
| 2024-41 | 0.4 | 6.6 | 30.8 | 1.5 | 52.7 | 14.2 | 8.3 | 1.0 | 2.6 | 4.5 | 9.1 | 13.0 | 10.9 | 1.8 |
| **Average Annual Growth Rate** | | | | | | | | | | | | | | |
| 2024-41 | 2.7% | 2.5% | 2.6% | 2.7% | 2.6% | 2.6% | 2.5% | 2.5% | 2.5% | 2.6% | 2.6% | 2.6% | 2.7% | 2.6% |

**Constant 2023/24 dollars & including GST*

*Source : CBA IQ, Location IQ*

## 3.4. Sales and Impacts

i. To assess the potential economic benefits and impacts that may arise from the proposed retail floorspace as part of the Willows Crossing development, the sales level which the development is projected to achieve is outlined.

ii. The sales performance of any retail facility, be it an individual store or a collection of stores provided in a shopping centre or precinct, is determined by a combination of the following critical factors:

- The composition and quality of the facility, including the major trader or traders; the specialty mix; development layout and configuration; ease of accessibility and parking; and the overall feel of the centre.
- The size of the available trade which the facility serves.
- The location and strength of competitive retail facilities.

iii. The sales potential for the retail floorspace as part of the Willows Crossing development is now considered accounting for these factors.

iv. As a result of the Willows Crossing development the likely sales impacts on competitive retail facilities resulting from the additional sales generated by the proposed retail floorspace also needs to be reviewed.

v. It is important to note that impacts outlined in this report are indicative as it is difficult to precisely project the sales impact of the opening of a new store/centre on existing retail facilities. Several factors can influence the impact on individual centres/retailers, including but not limited to:

- Refurbishment/improvements to existing centres.
- Expansions to existing centres.
- Loyalty programs of existing retailers.
- The existing centre mix and how it competes with the proposed development.

vi. For these reasons and other similar factors, sales impacts outlined in this report should be used as a broad indication.

vii. The following factors are typically considered when assessing the potential impacts of a new retail development on each existing facility or centre:

- The distance of the (impacted) centre, by road, from the proposed development.
- The size of the centre, in terms of total retail floorspace.
- The amount of supermarket floorspace, and brands of these supermarkets.
- The quality of offer and unique attributes including 24 hour trade etc.
- The role and function of the centre.
- Relative accessibility and convenience compared with the proposed retail development.

- The estimated performance of the centre (in current sales) and future performance (in the impact year), accounting for any future developments in the region that may also impact on the future sales of existing centres.

- The share of available expenditure which the centre attracts from the identified main trade area of the proposed development. A centre may not be situated in the identified main trade area of the proposed development, but its trade area may extend to include parts, or all, of the main trade area. For example, the trade area for large regional shopping centres typically includes circa 250,000 persons. Such a trade area is likely to include (partially or completely) trade areas for surrounding smaller convenience-based centres, sub-regional centres, retail strips and stand-alone supermarkets.

viii. The following key principles are then relied on when assessing the dollar (and percentage) impacts that are likely to be absorbed by existing facilities/centres:

- The greatest impacts are typically absorbed by the closest comparable centres. For example, a new full-line supermarket is generally likely to impact the closest full-line supermarket to the greatest extent, followed by impacts on other comparable supermarkets, and at the lower end of the spectrum, smaller scale supermarkets/foodstores, which serve much more limited roles.

- Impacts on smaller local supermarkets/foodstores tend to be smaller in scale, as these stores normally attract a lower market share of available trade area expenditure and perform a different role and function within the hierarchy, often serving the local walkable catchments surrounding them, and/or serving more specialised/discerning needs (e.g., a smaller IGA).

### 3.4.1. Methodology

i. Assessing a proposed retail development fundamentally requires an understanding of a variety of factors and methodologies, including:

- Retail turnover;

- Market shares;

- Retail supply, demand, and impacts.

ii. Location iQ adopt an evidence-based model that has been tested and refined over more than 10 years and across a range of clients. The model uses all available data, including the Location iQ proprietary database of supermarket and shopping centre tenant size and sales figures.

iii. Location iQ has undertaken more than 100 retail needs assessments/economic impact assessments in Australia over the last decade, adopting a similar methodology as presented in this report for the high-level overview of retail demand. A range of other property consulting firms also adopt the approach outlined by Location iQ.

### 3.4.2. Traditional Retail

i. Table 3.8 outlines forecast sales for the proposed traditional retail floorspace as part of the Willows Crossing development in FY2029 (the assumed first full year of opening). Key points to note are as follows:

- **GLA**: In total, retail floorspace of 2,800 sq.m is planned, including a supermarket (1,800 sq.m). Table 1.1 (previously) summarised the composition and assumed uses within the development.
- **Total retail forecast sales** are $22.3 million in FY2029. Key components of retail sales are as follows:
  - **Supermarket**: $15.3 million (or $8,500 per sq.m).
  - **Retail Specialty**: $7.0 million (or ~$7,000 per sq.m) assuming the entire 1,000 sq.m of retail specialty floorspace comprises retail uses.

ii. Retail forecast sales for the proposed development reflect the following:

- The proximity to existing supermarkets in the trade area, as demonstrated previously in Table 3.1.
- The total trade area current population and projected population.
- A significant amount of supermarket spending would be directed to supermarkets located beyond the combined primary sectors.
- The high profile, easily accessible nature of the site.
- The supermarket and specialty shops would provide convenience and choice for local residents and workers.
- The proposed development will provide additional choice and competition for retail facilities within the region.

TABLE 3.8. TOTAL TRADITIONAL RETAIL FORECAST SALES, FY2029

| Tenant Category | GLA (sq.m) | Forecast Sales ($'000) | Forecast Sales ($/sq.m) |
|---|---|---|---|
| **Traditional Retail** | | | |
| Supermarket | 1,800 | 15,300 | 8,500 |
| Retail Specialty | 1,000 | 7,000 | 7,000 |
| **Total Traditional Retail** | **2,800** | **22,300** | **7,964** |

*Source: George Weston Foods*

iii. For the purpose of this assessment, it is assumed that Habitat Mt Kynoch, a Fresh & Save supermarket and specialty shops at 1A & 3A Neil Street and the approved Warrego Highway development will be operational prior to the opening of Willows Crossing.

iv. Table 3.9 highlights the projected impacts from the opening of a supermarket and specialty shops as part of the Willows Crossing development. Key points to note are summarised as follows:

- The proposed traditional retail floorspace as part of the Willows Crossing development forecast sales are $22.3 in FY2029, including supermarket forecast sales of $15.3 million.

- The highest impact in dollar terms would fall on retail floorspace at North Toowoomba at -$5.3 million, or -5.0%. Most of this impact would be on the supermarkets at Northpoint Shopping Centre as these are the nearest provision of supermarket and retail floorspace in the region.
- An impact in percentage terms at -7.5% (or -$0.6 million) would fall on retail facilities at Wilsonton Hights, which includes the closest foodstore offer.
- The impact on retail facilities in Toowoomba CBA in percentage terms is -0.5% or -$3.9 million.
- Impacts on retail facilities at Wilsonton Shopping Centre and Highfields are also projected at -$4.3 million (- 3.5%) and $4.5 million (-3.0%), respectively.
- Other impacts are less than -$1.1 million, all -5.0% or less in percentage terms.
- All the competitive precincts would achieve similar or higher forecast sales in FY2029 post the opening of Willows Crossing compared to current sales. Overall, the viability of these facilities would not be threatened.
- In addition, there is an impact of around -$0.7 million on retail floorspace not listed in Table 3.9.

v. Given these projected impact levels, the viability of any centres or precincts would not be threatened. All centres are projected to achieve higher sales level in 2029 as compared with currently.

vi. Overall, the planned traditional retail floorspace as part of the Willows Crossing development would not impact on the viability or continued operation of any existing in the surrounding region, with all the impacts within the normal competitive range. The highest impacts are on strong trading, supermarkets that would continue to trade at levels above the national benchmark.

vii. In addition, the proposed development has 1,000 sq.m of retail specialty floorspace (~10 - 15 specialty stores), and residents will continue to frequent other centres/shops in the surrounding area for a variety of tenants that are not likely to be provided as part of the proposed development.

viii. Over the period from FY2024 to FY2029, the total trade area retail spending market is projected to grow at an average annual rate of 2.0% to $1.8 billion. The proposed traditional retail floorspace as part of the Willows Crossing development with forecast retail sales of $22.3 accounts for 1.3% of the projected increase in total trade area retail spending. Therefore, any impacts would be ameliorated within less than three of the planned development opening.

ix. In summary, all sales impacts across the identified centres are within an acceptable range, and when considered in the context of the size, performance and role and function of surrounding centres, would be highly unlikely to result in a material reduction of retail service provision. The proposed development would add to the range of services in the region predominantly servicing a localised resident and immediate worker population.

TABLE 3.9. TRADITIONAL RETAIL AT WILLOWS CROSSING DEVELOPMENT PROJECTED IMPACTS, FY2029

| | Unit | Estimated 2024 | Projected 2029 Pre Dev. | Projected 2029 Post Dev. | Impact 2029 $M | Impact 2029 % |
|---|---|---|---|---|---|---|
| ***Traditional Retail - Willows Crossing*** | ***$M*** | ***n.a.*** | ***n.a.*** | ***22.3*** | ***n.a.*** | ***n.a.*** |
| **Regional Centres** | | | | | | |
| Wilsonton Heights Plaza | $M | 7.3 | 8.0 | 7.4 | -0.6 | -7.5% |
| Harlaxton | $M | 3.8 | 3.9 | 3.7 | -0.2 | -5.0% |
| North Toowoomba | $M | 100.9 | 106.1 | 100.8 | -5.3 | -5.0% |
| Habitat Mt Kynoch | $M | n.a. | 11.0 | 10.5 | -0.4 | -4.0% |
| Wilsonton Shopping Centre | $M | 118.5 | 122.0 | 117.7 | -4.3 | -3.5% |
| Toowoomba CBA | $M | 672.5 | 788.7 | 784.8 | -3.9 | -0.5% |
| Newtown | $M | 205.0 | 217.9 | 216.8 | -1.1 | -0.5% |
| Bridge Street Plaza | $M | 25.8 | 27.1 | 26.5 | -0.5 | -2.0% |
| East Toowoomba | $M | 77.4 | 85.7 | 85.3 | -0.4 | -0.5% |
| Charlton | $M | n.a. | 22.9 | 22.9 | -0.1 | -0.3% |
| Highfields | $M | 136.3 | 150.9 | 146.4 | -4.5 | -3.0% |
| Withcott Central | $M | 10.0 | 11.1 | 11.0 | 0.0 | -0.2% |
| Gowrie Street Shopping Centre | $M | 11.0 | 11.6 | 11.5 | 0.0 | -0.2% |
| Oakey | $M | 49.8 | 52.4 | 52.2 | -0.1 | -0.3% |

**Constant 2023/24 dollars & including GST*

*[1] Proposed centres and expansions assumed to be trading for a full year by FY2029*

## 3.4.3. Large Format Retail

i. Table 3.10 highlights, sales for the proposed trade showrooms and LFR tenants are $17.5 million in 2028/29 (constant 2024 dollars), a trading level of $3,500 per sq.m has been adopted. This is around 5.4% of the total trade area large format spend in 2029 and would account for less than 2 years of growth.

ii. This would represent a total trade area market share of 5.4% of the large format retail market, or 1.0% of the total retail market. This figure allows for all forecast sales to be generated by total trade area residents (i.e. no sales from residents beyond the total trade area).

iii. This is a conservative approach and if the development was to be delivered in stages, the forecast sales and impacts would differ.

iv. Based on the above, on average, the estimated impact on **large format retail floorspace** would be around -5.4%. Generally, retail trading impacts between -10% to -15% are considered by the industry to be high but acceptable, with impacts less than -10% considered relatively moderate, and impacts less than -5% generally considered minor/negligible. Other factors such as trading performance; expansions/refurbishments of centres; potential loss of services to the community; expected growth; and overall net community benefit should be considered.

v. Forecast sales for the proposed development would be generated from three main sources:

- Impacts on existing and planned large format retail floorspace **within the total trade area**. In total, there is an estimated 48,800 sq.m of large format retail floorspace currently.
- Impacts on existing and planned large format retail floorspace **beyond the total trade area**. This is likely to be minimal given the regional nature of the location and the geographically large main trade area.
- New spending from the opening of new floorspace/concepts which appeals to customers.

vi. In this instance, the likely contribution to **large format retail** sales from the three sources would be:

- Total trade area impacts: 60% or $10.5 million
- Beyond the total trade area impacts: 30% or $5.25 million
- New spending (no impact): 10% or $1.7 million

vii. The impacts outlined above represent a worst-case scenario as the retail spending market is essentially held constant, with the only growth in the market coming from population growth and real growth. In reality, new retailers that enter the market generate additional spending that would otherwise not have occurred. This happens when a competitor opens and when the subject development opens. Only a portion of sales generated by large format retail floorspace/ showrooms as part of the Willows Crossing development will be redirected from competitors, resulting in actual impacts that are lower than those outlined above.

viii. Other key points to note include:

- With 1,000 staff expected to work at the new Toowoomba Hospital, as well as around 2,250 new residents to the immediate east, there is a demand for convenient retail options that can cater to hospital staff, patients, visitors and local residents. The inclusion of large format retail/showroom floorspace as part of Willows Crossing will provide convenient access to essential goods and services.
- Other facilities forming part of the development – such as the traditional retail, fast food facilities, commercial (i.e. gym, medical) and short term accommodation – may stand to benefit from the increase in customers to the site and spending that will be retained within the total trade area.
- The strategic location of Willows Crossing, combined with its comprehensive retail and non-retail offerings, ensures that residents, hospital staff, and visitors have access to a variety of essential services and goods within a single location, increasing convenience and reducing travel time.

ix. Overall, the proposed large format retail floorspace/showrooms as part of the Willows Crossing development would not impact on the viability or continued operation of any existing or proposed centres in the surrounding region. Sales impacts will be spread across a range of facilities, within and beyond the total trade area. Impacts will be in the first year, with all facilities able to capture market growth in future years.

# 3.5. Summary

i. Retail facilities within Toowoomba form a traditional retail hierarchy, with the Toowoomba CBA providing a range of higher order non-food-based facilities such as the regional shopping centre, Grand Central Toowoomba.

ii. To the west and south of the Toowoomba CBA, sub-regional shopping centres Clifford Gardens and Toowoomba Plaza provide further non-food-based floorspace.

iii. Smaller neighbourhood shopping centres service essential food-based demand across the remainder of Toowoomba.

iv. The proposed Willows Crossing mixed use development will not change the existing retail hierarchy within Toowoomba and but would provide local residents and workers a convenient offer near their homes or place of work. Importantly, shoppers would still have to frequent larger shopping centres to undertake a variety of spending that would not be possible at the proposed Willows Crossing development.

# 4 Short Stay Accommodation Assessment of Potential

## 4.1. Proposed Development

i. Short-stay accommodations, particularly hotels, play a critical role in the services industry, closely intertwined with the tourism and hospitality sectors.

i. The accommodation precinct including short-stay accommodation facility (i.e. hotel) of 100 rooms as well as ground level amenity expected to include a bar/restaurant is planned to the east of the medical/professional precinct and north of Crossing Central. It will be provided centrally on the site sounded by a range of complementary uses.

ii. The location of the Willows Crossing site, adjacent to the new Toowoomba Hospital, has the potential to attract a consistent flow of patients, family members and workers who may use short-term accommodation. By providing convenient and affordable lodging options, the development can contribute to increased productivity by reducing commuting times for workers and offering a practical solution for those needing to stay near their place of work. Family members would also be able to respond to the needs of loved ones quickly in what are likely to be difficult circumstances.

iii. The short-stay accommodation will offer affordable short-stay accommodation, with an indicative star rating of 3.5 – 4.0, adjacent the future Hospital.

## 4.2. Supply

i. Table 4.1 provides key details regarding individual short stay accommodation facilities within the total trade area. Across the total trade area, there are some 52 short stay accommodation facilities, providing 1,100 rooms (average of 21 rooms per facility). The average star rating is 3.6.

ii. Map 4.1 provides an overview of the short-stay accommodation facilities, including hotels, surrounding the Willows Crossing site. The analysis highlights a limited availability of short-stay options in the immediate vicinity, with notable facilities including:

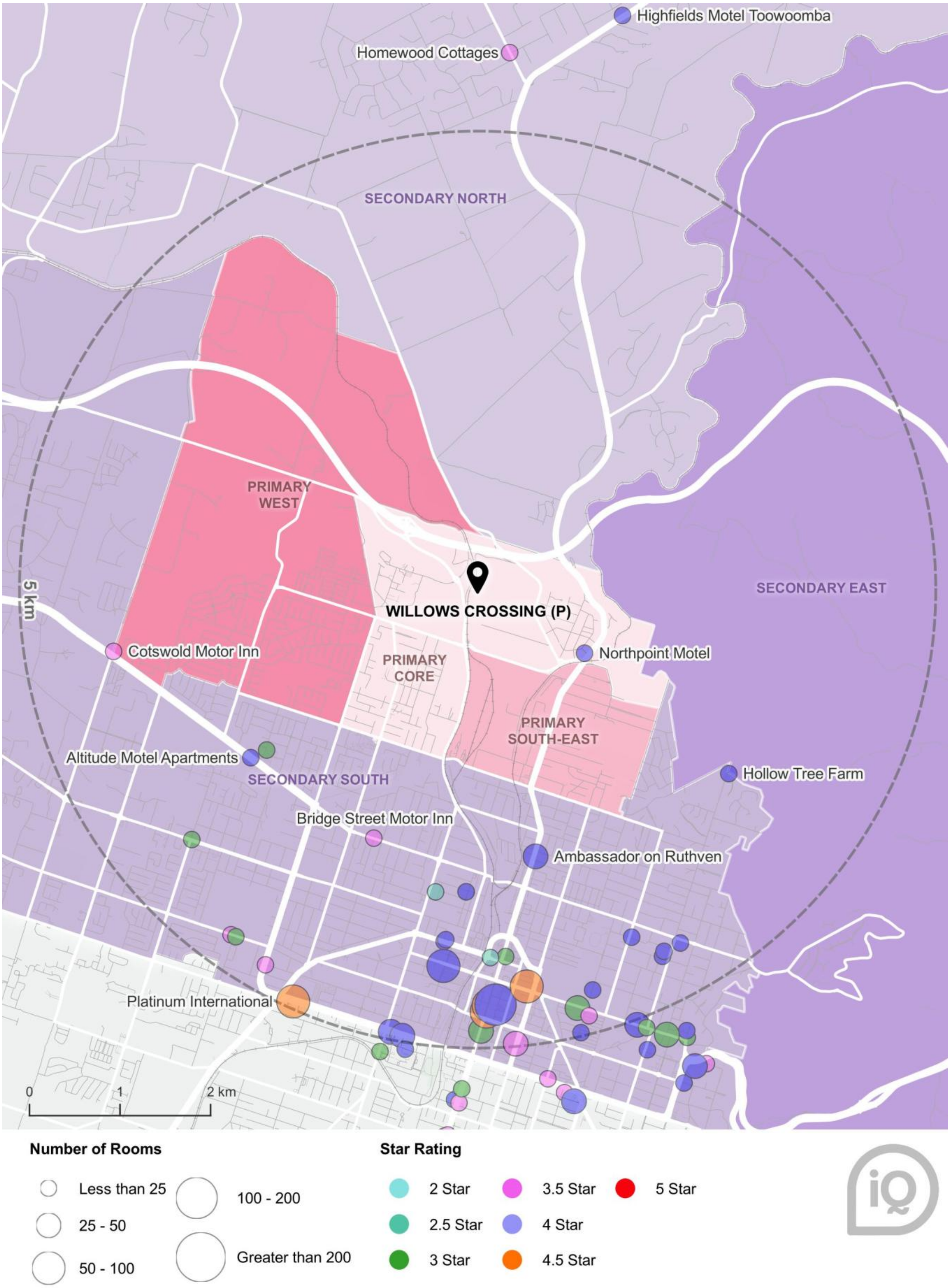
- **Northpoint Motel** is 2 km to the east and includes 24 rooms. This four star hotel includes onsite parking and a range of room types such as apartment style suits with bedrooms. This is the only short-stay accommodation within the combined primary sectors.
- **Cotswold Motor Inn** (5.7 km to the west, secondary south sector) includes 21 rooms as well as a restaurant and bar, and pool.
- 

iii. A number of budget accommodation facilities are located around the existing Toowoomba Hospital to the south of the trade area along West Street and James Street. These accommodation facilities generally have lower prices than the average accommodation facility within the trade area, and range in size from 10 – 30 rooms. The prices outlined below are the lowest reported across booking websites that advertise that hotel. Accommodation facilities include:

- City Motor Inn - $115 per room
- Athena Motel Apartments $149 per room
- Highlander Motor Inn and Apartments - $154 per room
- Asters on James Motor Inn $177 per room
- Apollo Lodge $173 per room

iv. There are two proposed short term accommodation facilities approved within Wilsonton (secondary south sector) namely, Rose Park Motel expected to include 34 rooms and Erin Street development which is proposed to include 13 serviced apartments. Planning is also underway for the former quarantine centre to be developed into accommodation as part of an entertainment precinct near the Toowoomba Wellcamp Airport. This development is awaiting funding to progress.

MAP 4.1. TOOWOOMBA SHORT STAY ACCOMMODATION



## TABLE 4.1. ACCOMMODATION FACILITIES

| Name | Address | Suburb | No. of Rooms | Average Rate per night | Star Rating |
|---|---|---|---|---|---|
| **Primary Core** | | | | | |
| Northpoint Motel | 277-279 New England Highway | Harlaxton | 24 | $ 189 | 4 |
| **Secondary East** | | | | | |
| Murphy's Creek Hideaway | 356 Thomas Road | Upper Lockyer | 6 | NULL | 2 |
| **Secondary North** | | | | | |
| Reflections - Lake Cooby | 239 Loveday Road | Geham | 15 | NULL | 2 |
| Homewood Cottages | 11 Cawdor Road | Highfields | 3 | $ 229 | 3.5 |
| Highfields Motel Toowoomba | 10552 New England Highway | Highfields | 24 | $ 195 | 4 |
| Gowrie Hotel Motor Inn | 6 - 12 Kingsthorpe-Haden Road | Kingsthorpe | 9 | NULL | 3 |
| **Secondary South** | | | | | |
| Coachman Motel | 4 Burnage Street | East Toowoomba | 21 | $ 110 | 3.5 |
| Sierra Cottage | 13 Kent St | East Toowoomba | 1 | NULL | 3.5 |
| Bluestone Cottages - The Shop | 11 Gowrie St | Toowoomba | 1 | NULL | 4 |
| Flying Spur Motel | 277 Taylor Street | Wilsonton | 12 | NULL | 3 |
| Whiteoaks Motel | 12 Margaret Street | East Toowoomba | 32 | NULL | 3 |
| Motel Glenworth Toowoomba | 1 Margaret Street | East Toowoomba | 13 | NULL | 3 |
| Blue Violet Motor Inn | 31 Margaret Street | East Toowoomba | 13 | NULL | 3 |
| Maple Cottage -Perfect Eastside Location | 1 Tant St | East Toowoomba | 1 | NULL | 4 |
| Nell's Place | 133 Russell Street | Toowoomba | 1 | NULL | 4 |
| Best Western Tuscany On Tor Motor Inn | Cnr of Tor and Lendrum Street | Newtown | 20 | NULL | 3.5 |
| Hedge House- luxury space style location | 38 Bridge St | East Toowoomba | 1 | NULL | 4 |
| Pure Land Guest House | 11 Boulton Terrace | Toowoomba | 9 | NULL | 2.5 |
| The Met Hotel | 348-350 Ruthven St | Toowoomba | 15 | NULL | 3 |
| The Keeper's House | 13A Dunmore Street | East Toowoomba | 1 | NULL | 4 |
| The Lighthouse | 2A Cavell Street | East Toowoomba | 1 | NULL | 4 |
| Frangipani House | 78 Mary Street | East Toowoomba | 1 | NULL | 4 |
| Bluestone Cottages - The Villa | 11A Gowrie Street | Toowoomba | 1 | NULL | 4 |
| Keeler Cottage | 88A Lindsay Street | East Toowoomba | 1 | NULL | 4 |
| A Raceview Motor Inn | 52 Hursley Road | Newtown | 9 | $ 118 | 3 |
| Great Divide Motor Inn | 5-7 Herries St | East Toowoomba | 20 | NULL | 4 |
| Clifford Park Holiday Motor Inn | 54 Hursley Road | Newtown | 19 | $ 150 | 3.5 |
| Shamrock Hotel Motel | 604 Ruthven Street | Toowoomba | 30 | $ 136 | 3 |
| Vacy Hall Toowoomba's Grand Boutique Hotel | 135 Russell St | Toowoomba | 12 | NULL | 4 |
| Park Motor Inn | 88 Margaret St. | East Toowoomba | 47 | $ 165 | 3 |
| Applegum Inn | 41 Margaret Street | East Toowoomba | 25 | $ 140 | 3.5 |
| Laguna Apartments | 189 Hume Street | Toowoomba | 27 | $ 259 | 3.5 |
| Nightcap at Federal Hotel Toowoomba | 111 James St | East Toowoomba | 20 | $ 251 | 3.5 |
| The Arbour Boutique Apartments | 27 Scott St | East Toowoomba | 11 | $ 449 | 4 |
| Glenellen Bed and Breakfast | 56 Lindsay Street | East Toowoomba | 21 | $ 98 | 4 |
| Eastgate on the Range Motel | 22 Burnage Street | East Toowoomba | 39 | $ 187 | 4 |
| Toowoomba Central Plaza Apartment Hotel | 532-544 Ruthven Street | Toowoomba | 90 | $ 260 | 4.5 |
| Comfort Inn Grammar View | 39 Margaret Street | East Toowoomba | 32 | $ 158 | 4 |
| Burke and Wills Hotel | 554 Ruthven Street | Toowoomba | 82 | $ 223 | 4.5 |
| Oaks Toowoomba Hotel | 25 Annand Street | Toowoomba | 102 | $ 439 | 4 |
| Quest Toowoomba | 133 Margaret Street | Toowoomba | 74 | $ 391 | 4.5 |
| Wilsonton Hotel | 40 Richmond Drive | Wilsonton | 12 | $ 136 | 3 |
| Cotswold Motor Inn | 389 Boundray Street | Cotswold Hills | 21 | NULL | 3.5 |
| Altitude Motel Apartments | 366 Bridge Street | Wilsonton | 19 | NULL | 4 |
| Ambassador on Ruthven | 200 Ruthven Street | North Toowoomba | 34 | $ 225 | 4 |
| Bridge Street Motor Inn | 291 Bridge Street | Newtown | 21 | $ 220 | 3.5 |
| Hollow Tree Farm | 2A Rifle Range Road | Mount Lofty | 1 | NULL | 4 |
| National Hotel Toowoomba | 59 Russell Street | Toowoomba | 17 | $ 82 | 2.5 |
| Potters Toowoomba Hotel | Margaret St. | Toowoomba | 54 | $ 315 | 4 |
| **Tertiary** | | | | | |
| Park House Motor Inn | 27 Campbell Street | Oakey | 8 | $ 148 | 3.5 |
| Oakey Motor Inn | 40 Campbell Street | Oakey | 16 | $ 177 | 3 |
| Kellys Motel Oakey | 59 Campbell Street | Oakey | 11 | $ 140 | 3.5 |

*Source Booking.com*

# 4.3. Demand

i. A hotel as part of the Willows Crossing development offers several compelling benefits for both visitors and workers. These includes proximity to the future Toowoomba Hospital for both out patients needing regular hospital appointments, temporary or short term workers (locum employees), families wanting to be in close to patients, as well as the potential to offer conference facilities, and more.

ii. Demand for short-stay accommodation at Willows Crossing is driven by its proximity to the New Toowoomba Hospital including the following factors:

- Healthcare professionals often require temporary accommodation during their relocation process or for short-term assignments, internships, or training programs.
- Hospitals frequently host visiting specialists, researchers, and consultants who may need short-term accommodation close to the facility.
- Hospitals may host conferences, workshops, and seminars, drawing participants from other regions who need temporary lodging.
- Family members travelling from regional areas who want to stay close to patients often seek nearby accommodation, therefore, adding to the demand.

iii. In summary, the subject proposal will add in a positive way to the Toowoomba region, driven by community and economic need for accommodation facilities close to the new Hospital. The proposed 100 rooms will provide the following community and economic benefit:

- The proposal would leverage infrastructure such as the new Toowoomba Hospital, currently under construction.
- Short-term accommodation provides a convenient and comforting solution for out-of-town patients and their families, facilitating easier access to the hospital for treatments, consultations, and emergency visits.
- For patients undergoing treatment and their families, proximity to the hospital can significantly reduce travel time and associated stress. This is particularly beneficial for those with early morning appointments or those requiring frequent visits.
- The proposed short-term accommodation would benefit temporary staff, visiting medical professionals, or those looking to relocate while seeking permanent housing.
- Nearby accommodation options can make the hospital more attractive to potential patients, further enhancing the hospital's competitiveness and reputation within the region.
- Short-term accommodation caters to the diverse needs of patient needs, ranging from short stays for outpatient procedures to longer durations for families of seriously ill patients.
- The proposal would generate economic benefits in the Toowoomba region through the initial investment which would create construction jobs, and also ongoing operational employment.

iv. Overall, a hotel as part of the Willows Crossing development is considered supportable.

# 5 Childcare Assessment of Potential

## 5.1. Proposed Development

i. A 150 place childcare facility is proposed as part of the Willows Crossing development and is expected to be positioned within the Crossing Central precinct.

## 5.2. Supply

i. Map 5.1 illustrates the locations of childcare centres in the primary sectors (the catchment area of most relevance in assessing the supply and demand for childcare facilities) and the surrounding suburbs.

ii. As shown, three childcare centres are currently located within the primary sector providing a combined 335 places.

iii. Table 5.1 shows availability by day of week for a selection of childcare centre location within the primary sector and immediately beyond in the secondary south sector (in 6.0 km by road). There is a mix of availability across childcare centres. Those that can take additional children can generally do so across multiple days of the week.

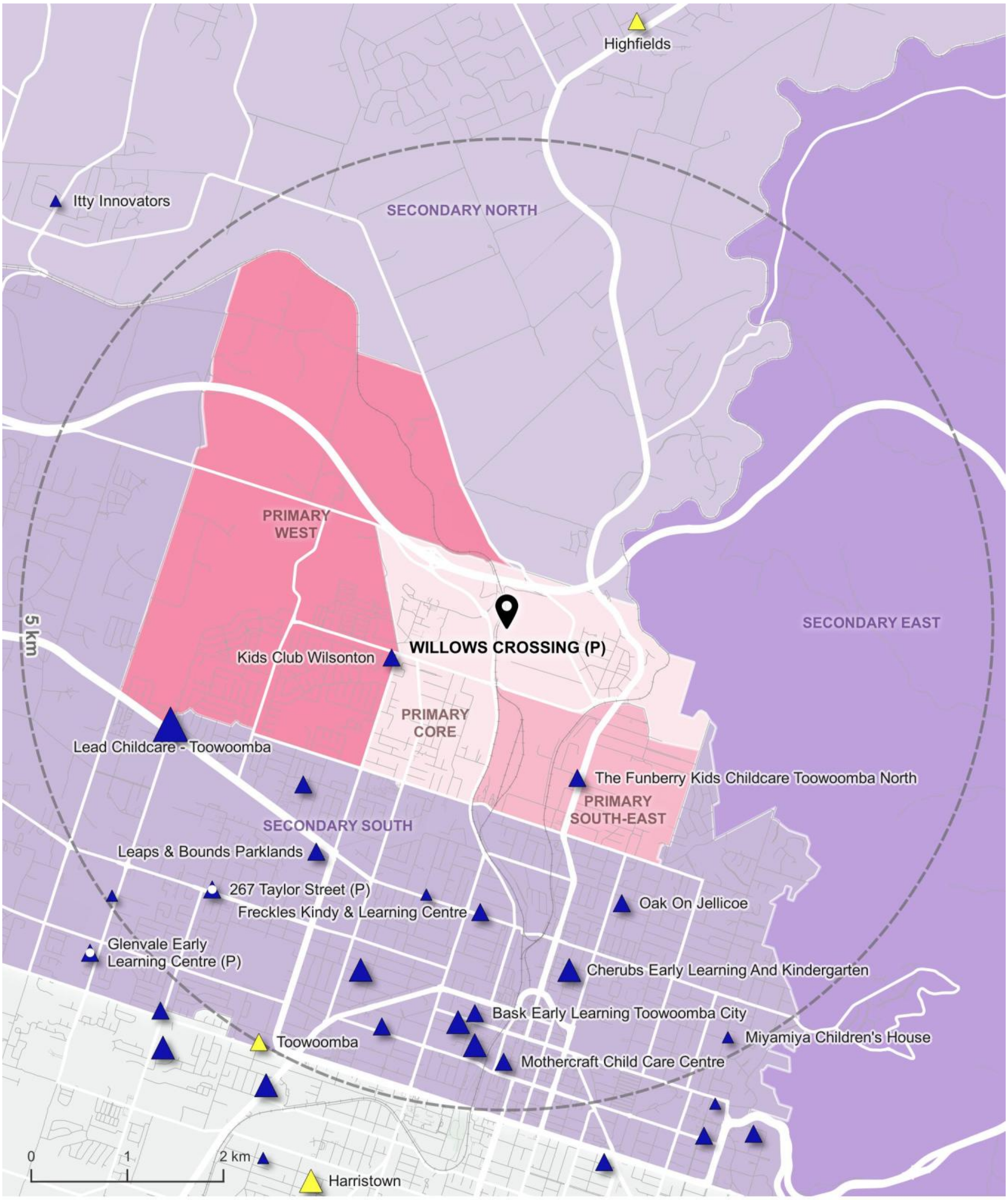
iv. The three closest childcare centres are within 3 km of the subject site with key points to note include:

- Kids Club Wilsonton is south-west of the subject site, the centre is approved for 75 places. Fees are around $125 per day. The centre currently has a rating of Metting NQS and has vacancies for kids aged over 15 months.

- The Funberry Kids Childcare has a Working Towards NQS rating. The centre is approved for 55 places and is reporting limited vacancies across various age groups across multiple days of the week.

- Freckles Kindy and Learning Centre is approved for 64 places. Fees are around $115 per day with an NQS rating of Meeting.

MAP 5.1. TOOWOOMBA CHILDCARE




**Number of Approved Spaces**

- < 50
- 50 - 100
- 100 - 150
- 150 - 200
- > 200

**Childcare Centre**

- Goodstart Early Learning
- Other Childcare

** White dot indicates proposed childcare*

## TABLE 5.1. WILLOWS CROSSING SELECTED CHILDCARE CENTRE DETAILS

| Child Care Centre Name | No. Places | Overall NQS Rating* | Daily Fee | Vacancies Across All Age Groups Monday | Tues. | Wed. | Thurs. | Friday | Comments | Dist. From Site (km) |
|---|---|---|---|---|---|---|---|---|---|---|
| **Catchment Area** | | | | | | | | | | |
| Kids Club Wilsonton | 75 | Meeting NQS | $125 | Yes | Yes | Yes | Yes | Yes | 5 days for the over 15 month olds, nursery less certain | 1.3 |
| The Funberry Kids Childcare | 55 | Working Towards NQS | $80 | Yes | No | No | No | Yes | 1-2 days for over 15 month olds | 2.4 |
| Freckles Kindy and Learning Centre | 64 | Meeting NQS | $115 | n.a. | n.a. | n.a. | n.a. | n.a. | no answer | 2.6 |
| Oak on Erin | 100 | Working Towards NQS | $146 | Yes | n.a. | n.a. | n.a. | Yes | 2 days for nursery, 2 for toddler, Monday & Friday for kindy - "not many spots in general" | 3.2 |
| Oak on Jellicoe | 77 | Working Towards NQS | $150 | No | No | No | No | Yes | Only Friday this year, next year also tight | 3.4 |
| Leaps and Bounds | 63 | Working Towards NQS | $115 | Yes | Yes | Yes | Yes | Yes | Sitting at 90% occupancy - start care at 15 months old | 3.6 |
| Cherubs Early Learning Centre | 120 | Meeting NQS | $111 | n.a. | n.a. | n.a. | n.a. | n.a. | no answer | 3.7 |
| Lead Childcare | 205 | Meeting NQS | $138 | n.a. | n.a. | n.a. | n.a. | n.a. | no answer | 4.5 |
| Kath Dickson Education & Care Centre | 44 | Working Towards NQS | $103 | n.a. | n.a. | n.a. | n.a. | n.a. | Currently near capacity but could definitely fit in the new year | 6.1 |

** National Quality Standard*
*Source: CareforKids; ACECQA as of November 2024*

## 5.3. Demand

i. A childcare centre as part of the subject development would likely primarily service workers as well as the immediate population.

ii. Table 5.2 outlines the supply and demand for childcare places in the primary sector, over the period to 2041. In terms of demand, there are currently 782 children aged 0-4 years in the key primary sector. This figure is projected to remain relatively constant over the period to 2041. On this basis, the primary sector population would demand around 300 long day care places.

iii. Assuming a 70% occupancy rate and an allowance of 10% for the inclusion of five year olds in the long day care market, there is currently an undersupply of ~100 childcare places within the primary sector currently.

iv. It is understood that the worker population at the new Toowoomba Hospital is around 1,000 persons, with some 70% expected to be female. This would likely result in significant additional demand for childcare services in proximity to the hospital. In addition, the proposed Willows Crossing development upon completion will also support a significant worker population who would also likely utilise convenient childcare services within the same precinct.

v. A common approach is to estimate that between 5% to 15% of employees typically demand childcare services near their place of work, this can vary significantly and for the purpose of this assessment it is conservatively assumed at 7.5%. On this basis, the worker population would demand around 100 long day care places currently and around 299 childcare places by 2041.

vi. Worker demand could likely be higher given the high proportion of female workers (~60%) currently, expected to increase upon the opening of the new Toowoomba Hospital.

vii. Based on this, the 150 place childcare facility proposed as part of the Willows Crossing development is supportable upon the opening of the new Toowoomba Hospital and completion of the Willows Crossing development. With an indicative undersupply of around 200 places currently, increasing to around 400 places by 2041, which is largely driven by the significant increase in the immediate worker population around the site.

viii. The childcare centre would be located with complementary uses, providing a convenient drop off point for parents on key route in the area.

ix. In addition to this there is also a community and economic need for an additional childcare centre to be developed within the local catchment area based on the following:

- With ~1,000 people expected to work at the new Toowoomba Hospital, a conveniently located childcare centre would support hospital staff and other working parents in the area, providing them with reliable childcare options close to their place of employment.
- The proposal would be close to existing schools, reinforcing the community uses in the area.
- The development of approximately 900 dwellings to the east of the Willows Crossing site will likely attract families with young children. The proposed childcare centre will help meet the needs of these families, reducing commute times and stress associated with finding suitable childcare solutions elsewhere.

- A number of existing childcare centres are reporting high occupancy levels.
- Access to affordable and convenient childcare offers parents more choice and enables them to enter or return to the workforce.
- Including a childcare facility as part of the mixed-use development increases the attractiveness of Willows Crossing, making it a desirable location for families and companies. The proposed childcare centre would complement other services and amenities within the development, such as the gym, retail outlets, and medical centre.
- The inclusion of a childcare centre as part of Willows Crossing will not impact on the centres hierarchy or on the viability of any centres.
- It would result in a positive economic benefit to the local community, providing choice in childcare centres conveniently located close to significant employment and residents' homes.

TABLE 5.2. TOOWOOMBA CHILDCARE SUPPLY AND DEMAND

| | Projected Over/Under Supply | | | | |
|---|---|---|---|---|---|
| | 2024 | 2026 | 2031 | 2036 | 2041 |
| **Population** | | | | | |
| Catchment Area Population | 12,131 | 12,291 | 13,491 | 14,691 | 15,141 |
| Catchment Area Proportion of 0 - 4 Years | 6.4% | 6.7% | 5.1% | 5.2% | 5.2% |
| Catchment Area Children Aged 0 - 4 Years | 782 | 819 | 685 | 763 | 791 |
| **Resident Demand for Childcare Places** | | | | | |
| Children Aged 0 - 4 Years in Childcare* | 60.0% | 60.0% | 60.0% | 60.0% | 60.0% |
| Average Days Per Week* | 3.2 | 3.2 | 3.2 | 3.2 | 3.2 |
| • FTE Demand (Children Aged 0 - 4 Years) | 300 | 315 | 263 | 293 | 304 |
| • Allowance for Children 5 Years (10% of total) | 33 | 35 | 29 | 33 | 30 |
| Resident Demand | 334 | 350 | 292 | 325 | 334 |
| **Worker Demand for Childcare Places** | | | | | |
| Immediate Workforce | 1,390 | 1,490 | 2,490 | 3,490 | 3,990 |
| Worker Demand for Childcare Services (@7.5%) | 104 | 112 | 187 | 262 | 299 |
| **Supply of Child Care Places (All)** | | | | | |
| Existing | 335 | 335 | 335 | 335 | 335 |
| Proposed (U/C & Approved Only) | 0 | 0 | 0 | 0 | 0 |
| Total Supply | 335 | 335 | 335 | 335 | 335 |
| Occupancy Ratio @ 70% | 70.0% | 70.0% | 70.0% | 70.0% | 70.0% |
| Adjusted Supply at 70% | 235 | 235 | 235 | 235 | 235 |
| **Indicative Over/Under Supply** | **-203** | **-227** | **-244** | **-353** | **-399** |

**Source: Child Care Subsidy data report (December-23); ABS: Childhood Education & Care, 2017*
**Source: Department of Education and Training, Early Childhood and Childcare in Summary*

# 6 Gym Assessment of Potential

## 6.1. Proposed Development

i. A gym of 400 sq.m is proposed as part of the Willows Crossing development expected to be included in the Crossing Central precinct which allows convenience retail, offices, food and drink outlets, and community services.

## 6.2. Supply

i. Map 6.1 illustrates the locations of gym facilities in the primary sector (the catchment area of most relevance in assessing the supply and demand for gym facilities). As shown, no gyms are provided within the primary sector currently.

ii. The latest IBISWorld report (August 2024) indicated there were 10,709 gymnasiums and fitness centres in Australia (2023-24), representing around one gymnasium for every 2,482 persons, recording total revenue of over $2.9 billion. The gym and fitness industry, therefore, has grown substantially in the past decade.

iii. Across Australia, there are ~2,500 people for every gym/fitness studio. Based on the current primary sector population alone there is likely to be potential for four small format (200 – 400 sq.m) gyms over the forecast period, as well as one or more ancillary fitness operator(s).

iv. The current primary sector population has capacity to service five gyms. It is noted that gyms in the secondary sectors would service some of this demand.

v. At 1-5 New England Highway (secondary north sector), a mixed use development is approved to include two gyms, totalling some 962 sq.m.

vi. The largest market players include the following:

- Fitness and Lifestyle Group TopCo Pty Ltd operations, which include Goodlife Health Clubs, Zap Fitness and Fitness First Australia. The combined sales of these three gym chains have resulted in almost 25% of industry revenue.
- Anytime Fitness is the industry's second largest player with over 20% of industry revenue.
- Viva Leisure who operates under the Club Lime brand, Hitt Republic, and Plus Fitness brands with almost 10% of industry revenue.

vii. In addition to the companies listed above, CrossFit (which is a brand which can be licensed to any qualified trainer wishing to establish their own box “gym”) is also a major player with some 550 existing gyms.

viii. Whilst the fitness/gymnasium industry has had its growth and contraction periods in the past, new forms of exercise are invented and marketed constantly with society’s increasing concerns about health, lifestyle and personal image. Gym memberships also allow for social interaction which underpins the future growth of this sector.

## 6.3. Demand

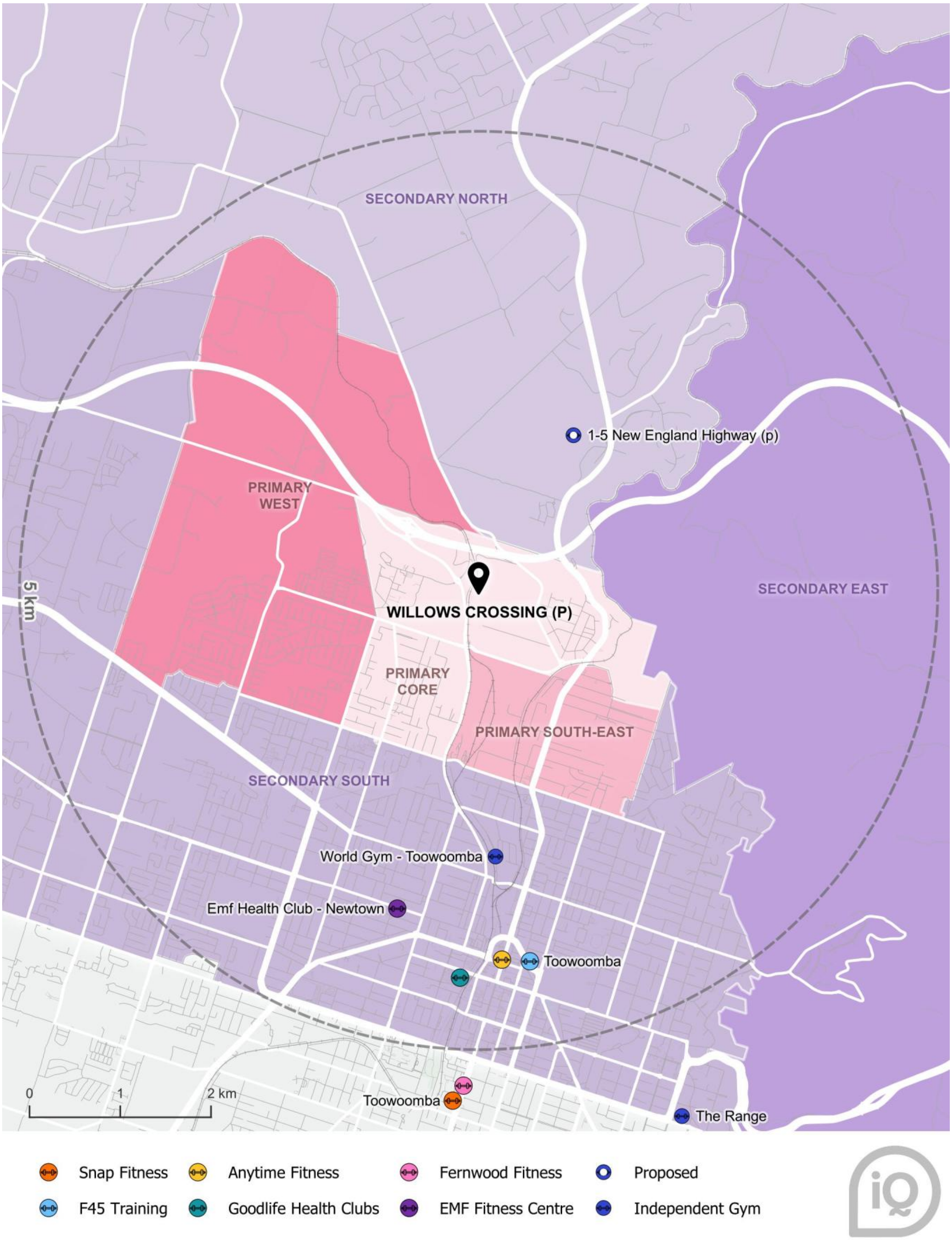
i. Assuming ~2,500 people for every gym/fitness studio, the combined primary sectors population growth alone of 3,010 persons by 2041 would support at least one addition gym.

ii. The proposed gym would also be frequented by workers in the area particularly by workers at the new hospital, adjacent the subject site.

iii. The proposed gym of 400 sq.m will provide increased choice as well as convenience for the local resident and worker populations as well as other community and economic benefits including:

- Attracting a steady influx of visitors, which can lead to increased foot traffic for surrounding businesses, including retail stores, cafes, and other services. This synergy can enhance the overall commercial viability of the area.
- With a significant number of people working at the nearby hospital and the planned 900 dwellings, a conveniently located gym promotes health and well-being in the community.
- A gym enhances the attractiveness of a mixed-use development to potential businesses, providing a comprehensive range of uses that can differentiate Willows Crossing from other developments.
- For hospital employees, having access to a nearby gym can improve work-life balance and provide stress relief, which is particularly valuable in high-pressure healthcare environments.
- The gym can work in harmony with other facilities such as the childcare centre, allowing parents to engage in fitness activities while their children are cared for, and the medical centre, offering rehabilitation or fitness programs aligned with health services.

## MAP 6.1. TOOWOOMBA GYMS AND SWIM SCHOOLS



# 7 Fast Food Assessment of Potential

## 7.1. Proposed Development

i. Two fast food pad sites are proposed as part of the Willows Crossing development within either the Service Industry or the Crossing Central precinct.

ii. The service industry precinct supports low-impact and service industries, particularly those that complement nearby medical, professional, and commercial activities.

iii. Non-industrial uses, such as food outlets and service stations, are permitted only if they directly support industrial functions and are accessible by walking or cycling.

iv. The Crossing Central precinct which allows convenience retail, offices, food and drink outlets, and community services.

## 7.2. Supply

i. The location of fast-food PAD sites in Australia are typically characterised by one or more of the following:

- Heavily trafficked roads and deriving business primarily from passing traffic.
- Associated with a supermarket or convenience-based retail facilities, although not necessarily co-located.

ii. Fast food facilities help to activate a site and create a destination, with easy access to passing pedestrian traffic and after-hours meal services (i.e. outside regular trading hours), also benefiting from excellent accessibility and visibility.

iii. Map 8.1 illustrates the existing location of major fast food facilities relevant to the site, within the combined primary sectors and secondary south sector. As shown, there are a cluster of fast food facilities around Northpoint Shopping Centre in the south-east sector, 3.3 km from the site.

iv. There are also clusters of fast food operators within the secondary south sector at Wilsonton, Clifford Gardens and within the Toowoomba CBA.

v. In terms of future competition, Map 7.1 shows only approved developments with a committed fast food brand. Approved developments in the main trade area include:

**Secondary South Sector**

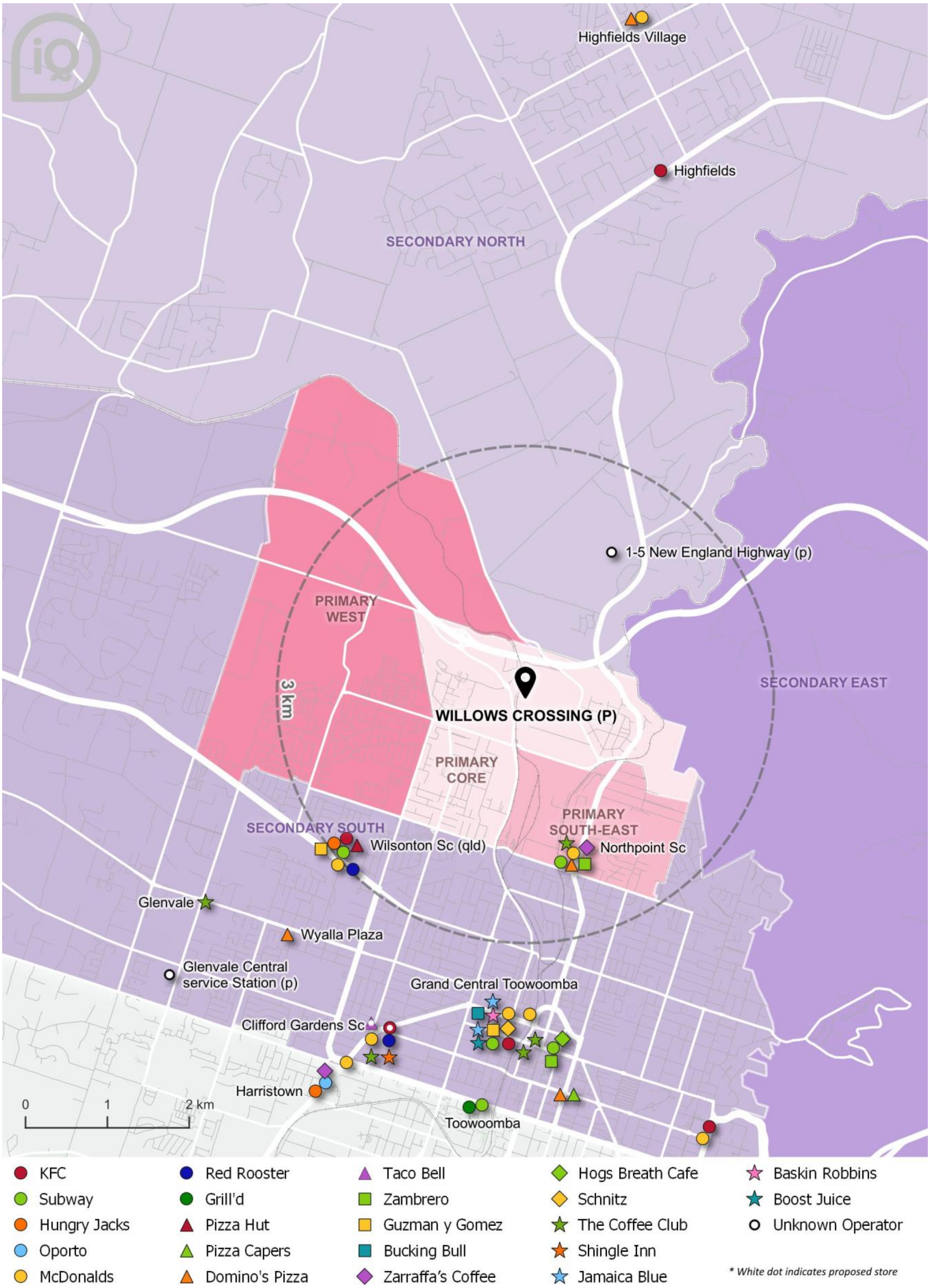
- Carl’s Junior at 360B Bridge Street, Wilsonton is anticipated for development in 2025.

- Queensland burger chain Mad Burger has received development approval for a fast food outlet with a drive thru at 350 Bridge Street, Wilsonton.
- Glenvale Central Service Station, at 202-216 Hursley Road has development approval for a 163 sq.m fast food outlet with drive thru.
- In 2022, Clifford Gardens Shopping Centre received development approval for KFC and Taco Bell outlets, with both planned to service a drive thru. The outlets would be situated at the south of the site.
- Clifford Gardens Shopping Centre has also received development approval for the construction of a Starbucks with drive thru, as part of a second stage of development.
- At 10804-10806 Warrego Highway, a mixed use development is anticipated to include a fast food outlet with drive thru.

**Secondary North Sector**

- At 1-5 New England Highway, two fast food outlets with drive thru are approved for development, with another fast food outlet with drive thru approved for the service station at the site.

MAP 7.1. TOOWOOMBA FAST FOOD



## 7.3. Demand

i. The subject proposal includes two fast food outlets. Currently fast food outlets are concentrated at Northpoint Shopping Centre as well as at Wilsonton, Clifford Gardens and within the Toowoomba CBA.

ii. There has been an increasing trend for the co-location of fast food restaurants given they can be provided in a convenient facility which operates extended hours on highly trafficked roads.

iii. The two fast food operators as part of the Willows Crossing development are expected to have frontage to a major road (i.e. direct access to either Mort Street and/or Griffith Street) and be co-location with a range other uses that would attract multiple customer segments from across the trade area, including from the adjacent hospital development.

iv. The defined total trade area population is projected to increase to around 112,500 persons by 2041. Together with the passing traffic, as well as a significantly increased worker and resident population in the immediate area would support the proposed food and drink outlets over the medium to long term.

v. Relevantly, the co-location of restaurants (food & drink outlets) with other complementary uses within a mixed-use development is increasingly a common trend throughout Australia, providing benefits to the public.

vi. The subject proposal is expected to achieve sales in the order of $5 million in FY2029. This would be less than 2% of total trade area food catering spending in 2029. Strong population growth within the total trade area would also allow for other food catering opportunities at over time.

vii. Overall, the proposal would not impact on the viability of other facilities, within or beyond the trade area, or the continuing function of centres. Other community and economic benefits of the proposed fast food outlets as part of the Willows Crossing development include:

- Increased convenience for passing traffic, with the subject site located in a highly accessible area with significant exposure to traffic, fast food outlets can cater to the needs of commuters, hospital visitors, and local residents looking for quick and convenient meal options.
- With the new Toowoomba Hospital nearby, fast food outlets offer convenient meal options for hospital staff on shift schedules, patients, and visitors who may have limited time for meals.
- Fast food outlets create numerous employment opportunities, from entry-level positions to management roles, generally employing a large number of younger staff.
- Fast food operators often operate extended hours, providing meal options at times when other dining establishments may be closed, therefore supporting the needs of shift workers and night-time hospital visitors.
- Fast food outlets also offer affordable dining options, making them accessible to a broad demographic, including families, students, and budget-conscious individuals.

viii. Based on this, the proposed two fast food pad sites at the Willows Crossing are considered supportable providing local residents and workers increased convenience and choice as drive-thru pad sites typically operating extended business hours.

# 8 Medical Assessment of Potential

## 8.1. Proposed Development

i. A medical centre and ancillary medical uses are proposed as part of the Willows Crossing development. The planning intent and outcomes for the Willows Crossing include a Medical/Professional precinct to the north of the Crossing Central precinct.

ii. The Medical/Professional precinct is planned to have ingress and egress via Mort Street.

iii. The precinct supports medical, para-medical, and related professional services, particularly to service the nearby Ballie Henderson Hospital and the new Toowoomba Hospital.

iv. Larger retail activities (e.g., supermarkets, department stores) are explicitly prohibited to protect the precinct's medical and professional focus.

v. The precinct is designed to be accessible and integrated with surrounding areas but does not aim to compete with higher-order retail centres, ensuring it maintains a complementary rather than competing role within the local centre hierarchy.

## 8.2. Supply

### 8.2.1. Medical Centres

i. Map 8.1 illustrates the location of medical facilities throughout the combined primary sector (the catchment area of most relevance in assessing the supply and demand for medical centres). As shown, there is only one medical centre provided, namely Northpoint Medical Centre which includes 14 GPs, 3.3 km south-east of the subject site.

ii. A number of smaller medical centres are immediately beyond the primary sector within the secondary south sector, including

- Platinum On North Medical Centre which includes six GPs, 2.5 km to the south.
- St Andrew's Toowoomba Medical Centre is adjacent Platinum On North Medical Centre and includes two GPs.
- WtMed The Doctors on Erin Street includes two GPs, 3.8 km south of the site.

iii. Across Australia, an average of 12.3 doctors are provided for every 10,000 persons. By 2041 the combined primary sector population is projected to support up to 19 doctors. There are currently 14 GPs provided, indicating demand for additional GPs over the forecast period.

iv. Typically, successful medical centres are situated at high profile locations, either along main roads or in proximity to a retail/commercial centre or transport node. Thereby facilities receive maximum exposure to passing traffic, but more importantly, are easily recognisable and accessible for the surrounding population.

v. Medical centres are also often strategically located near hospitals, allows medical centres to integrate services more effectively, providing patients with a comprehensive range of care. Specialists and subspecialists are often drawn to medical centres near hospitals due to the access to hospital resources, potential research opportunities, and the ability to coordinate closely with hospital-based care providers.

vi. Willows Crossing is planned to include a 500 sq.m medical centre in a high profile easily accessible location in close proximity to complementary infrastructure such as the existing Baillie Henderson Hospital and the new Toowoomba Hospital.

## 8.2.2. Ancillary Medical Uses

### Specialist Medical Facilities

i. Considering the location of the new Toowoomba Hospital at the Baillie Henderson campus (currently under construction) to the west of the Willows Crossing site, complementary medical facilities for the hospital are planned as part of the subject development. There are a range of specialist medical facilities that typically locate near hospitals and provide higher order medical treatments relating to:

- General health and wellbeing
- Back and neck pain
- Upper limb
- Elbow, wrist and hand
- Heart and lung conditions
- Sport injury
- Foot and ankle
- Pre and post-surgery
- Arthritis
- Falls and balance
- Pregnancy and women’s health
- Cancer rehab
- Lymphoedema
- Chronic disease management and prevention

ii. An example of a medical centre which includes some of these ancillary services is Ramsay Health Plus Ipswich which is located adjacent to St Andrew’s Ipswich Private Hospital (also operated by Ramsay Health Care) in the outer western suburbs of Brisbane. This facility includes pre and post-operative surgical care, men’s health, chronic disease management and prevention, cancer care, and maternity and women’s health.

iii. Demand for these types of uses is driven by the co-location with the new Toowoomba Hospital. It is understood that a Cancer Centre is proposed as part of the new Toowoomba Hospital and that urgent care and minor injury services associated with the hospital would be handled at the GP level by specialist medical facilities complementary to the hospital.

### Allied Health Facilities

i. Map 8.1 illustrates the concentrations of allied health facilities within the region. Specialist and ancillary medical uses include a range of professions and services, such as:

- Chiropractor
- Chiropodist
- Dentist
- Nutritionist
- Physiotherapist
- Dermatologist
- Paediatrician
- Psychiatrist
- Psychologist
- Pathology clinic
- Gynaecologist
- Cosmetic Surgery
- Cryotherapy
- Naturopath/Herbalist
- Speech therapy
- Medical equipment suppliers

ii. Table 8.1 provides a snapshot of the number of Australian Institute of Health and Welfare (AIHW) workers across the relevant Statistical Area 3 (SA3), with a focus on medical and ancillary-related professions. Toowoomba includes the Toowoomba and Darling Downs – East SA3s.

iii. As shown, there is a currently a lower than average provision of Chinese medicine practitioners, dental practitioners, occupational therapists, osteopaths, physiotherapists and psychologists.

iv. The listed professions represent those that typically form part of medical centres/precincts. Medical facilities at the Willows Crossing site would predominantly serve the combined primary sector population given the high concentration of allied health facilities within the secondary south sector. Additional demand may also result from the development of the new hospital which will have a wider draw.

v. In terms of future supply, a dental clinic with four dental rooms is approved for development at 179 West Street in the secondary south sector.

## 8.3. Demand

i. A medical precinct can provide complementary services to those offered by the hospital, such as specialist consultations, diagnostic imaging, pathology, physiotherapy, and allied health services, creating a comprehensive healthcare hub.

ii. History shows that other medical facilities often locate in proximity to hospitals. Given the location of the proposed Willows Crossing development opposite the new hospital, it would likely increase the demand for a medical centre at the subject site

iii. The proposed medical centre specialist medical facilities and ancillary medical practitioners would support hospital functions by handling routine and preventive care, effectively managing patient overflow, and reducing pressure on hospital services.

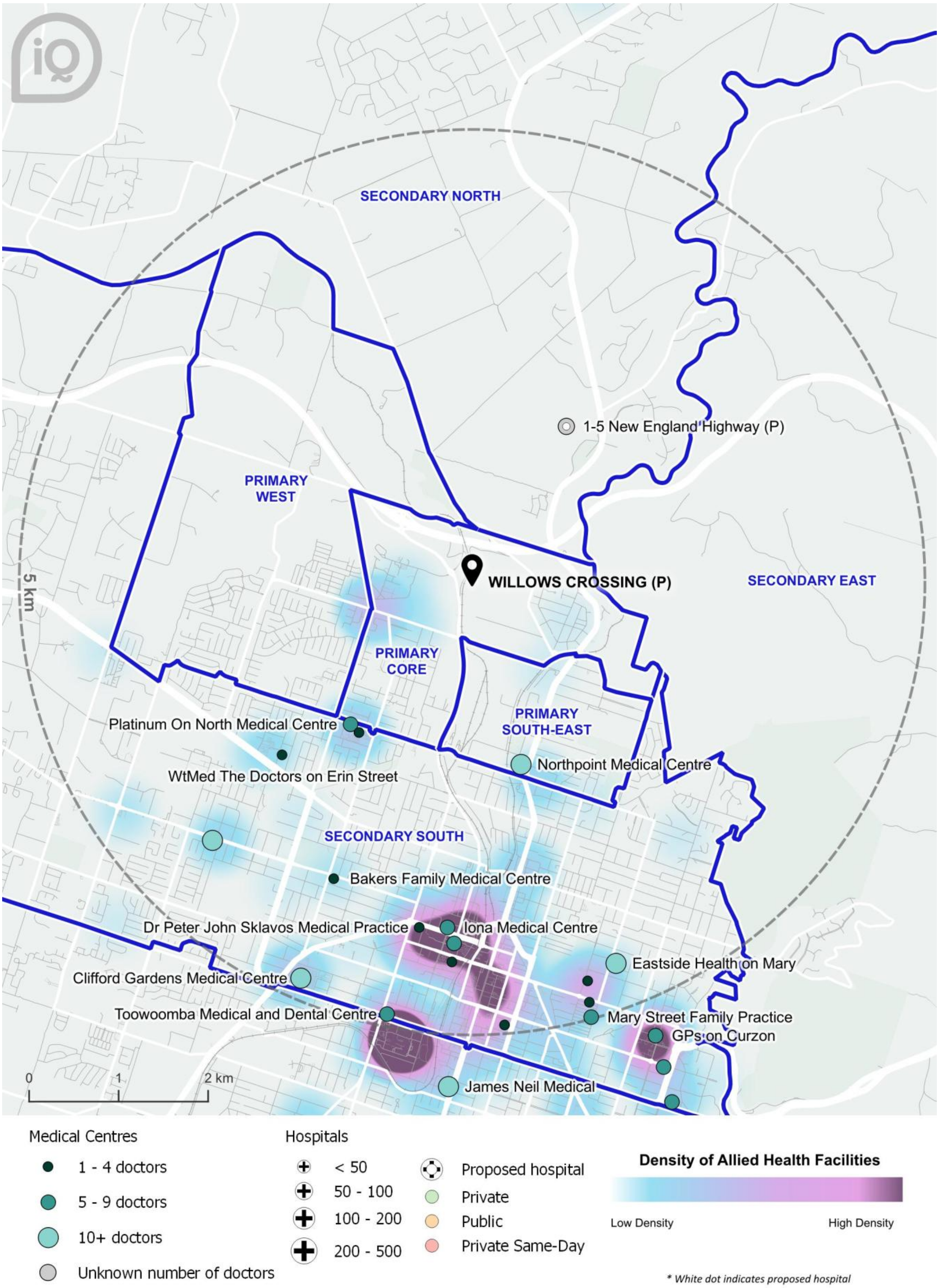
iv. By providing a medical centre next to a hospital it enhances accessibility for patients who require various healthcare services, reducing travel time and improving overall coordination of care.

v. The combined primary sector population alone demands 19 GPs by 2041, with 14 GPs currently provided this is at least an additional 5 GPs. The proximity of the subject site to the new Toowoomba Hospital would support the additional need for GPs within the combined primary sectors. Additionally, population and worker growth will also support the need for specialist medical facilities and ancillary medical practitioners.

vi. The significant increase in workers at the new Toowoomba Hospital would also increase demand for both traditional GPs, specialist medical facilities and ancillary medical practitioners in close proximity to where people work.

vii. Together, these factors contribute to a tangible demand for establishing a medical centre and precinct alongside the new Toowoomba Hospital.

MAP 8.1. TOOWOOMBA MEDICAL CENTRES AND ANCILLARY MEDICAL USES



## TABLE 8.1. TOOWOOMBA MEDICAL PRACTITIONERS AND ALLIED HEALTH PROVISION

| Practitioners | Health Prof. in SA3 (Employed no.) | Health Professionals per 10,000 persons | | |
|---|---|---|---|---|
| | | Catchment Area | SE QLD | AUS |
| **Medical Practitioners** | | | | |
| General Practitioner (GP) | 277 | **13.6** | 11.9 | 12.3 |
| Remaining Practitioners | 676 | **33.2** | 28.1 | 30.8 |
| Medical Practitioners | 953 | **46.8** | 40.0 | 43.1 |
| **Ancillary & Allied Health Professionals** | | | | |
| ATSI Health Practitioners | 7 | **0.3** | 0.0 | 0.3 |
| Chiropractors | 43 | **2.1** | 1.6 | 2.1 |
| Chinese Medicine Practitioners | 12 | **0.6** | 1.6 | 1.6 |
| Dental Practitioners | 175 | **8.6** | 8.7 | 8.8 |
| Medical Radiation Practitioners | 129 | **6.3** | 5.9 | 6.3 |
| Nurses and Midwives | 3,808 | **187.0** | 135.8 | 143.5 |
| Occupational Therapists | 172 | **8.4** | 8.9 | 9.6 |
| Optometrists | 58 | **2.8** | 2.4 | 2.3 |
| Osteopaths | 4 | **0.2** | 0.6 | 1.1 |
| Pharmacists | 213 | **10.5** | 10.2 | 11.0 |
| Physiotherapists | 190 | **9.3** | 12.7 | 13.1 |
| Podiatrists | 43 | **2.1** | 1.8 | 2.0 |
| Paramedicine Practitioners | 228 | **11.2** | 8.1 | 7.7 |
| Psychologists | 220 | **10.8** | 11.1 | 12.6 |

*SA3s: Toowoomba & Darling Downs - East* — **Lower than Average**

**2022 Headcount of Practitioners* — **Higher than Average**

*Source: Australia Government Department of Health and Aged Care*

# 9 Impact Assessment

This section of the report considers the likely trading impacts that can be anticipated following construction across each component of the development.

## 9.1. Economic Need, Impact & Location

i. Based on the population, demand, occupancy, and supply factors outlined throughout this assessment, the planned uses as part of the Willows Crossing mixed-use development will experience growth over and beyond the forecast period based on the planned population growth and expected increase in worker population in the immediate area.

ii. The proposed development is planned to comprise ~17,600 sq.m of floorspace, including a retail component of 8,000 sq.m, the majority of which is large format retail (5,000 sq.m).

iii. Significant components of the proposed development include:

- A small supermarket of 1,800 sq.m.
- Specialty shops including 1,000 sq.m of retail and 200 sq.m of non-retail floorspace.
- Large format retail floorspace (5,000 sq.m)
- Gym (400 sq.m
- A medical centre (500 sq.m)
- Specialist medical facilities and ancillary medical practitioners (~4,000 sq.m)
- Two fast food pad sites (700 sq.m)
- Short term accommodation (~100 rooms) with a bar/restaurant on the ground level.
- A childcare centre of 1,000 sq.m

iv. The proposed development would service current and future residents and workers of the region, as well as attracting interest from beyond.

v. The retail components of the development including traditional retail floorspace, large format retail floorspace and fast food facilities with drive-thru are expected to achieve sales in the order of $44.8 million (FY2028/29). The overall growth in retail expenditure for the total trade area over the period to 2041 is $761.3 million, the proposed Willows Crossing development would account for around 6% of the expected growth in the total trade area retail expenditure.

vi. Consequently, the subject development would be anticipated to have a negligible impact on existing and future retail and non-retail facilities throughout the region – given there is sufficient demand and facilities such as the childcare centre would service the significant worker population as part of the new Toowoomba Hospital.

vii. The development would also create a precinct that comprises a range of complementary uses and provides a destinational centre for residents, servicing their daily convenience needs.

viii. There is a community and economic need for a mixed-use development to be developed within the trade area which would result in a range of important economic benefits including:

- Overall, all uses as part of the mixed-use development would minimally impact surrounding uses, as well as have no impact on the existing centre hierarchy within the region.
- The development would combine a range of complementary uses in a central location in close proximity to a major employment hub.
- Increased convenience, choice of services, and possibly price competitiveness for residents. There is a gap for a mixed-use development in the trade area given the planned growth in the region. The subject development would provide additional retail and non-retail floorspace. With a focus on medial given the proximity to the new Toowoomba Hospital.
- The proposed development aligns with typical industry benchmarks in terms of size, layout, design, and number of places.
- The development will provide high-quality amenities, design, and aesthetics, thereby improving the customer experience and creating strong community engagement.
- By offering a mix of retail and non-retail uses, the development will retain demand within the trade area that would otherwise be directed elsewhere.
- The site will not impact on the centre hierarchy or on the viability of any centres.

ix. The subject site also represents the logical location for a mixed-used integrated medical and retail development on the reasons outlined above, as well as the level of accessibility and convenience that will be afforded to residents.

## 9.2. Employment and Wage Impacts

i. The proposed Willows Crossing development would result in a range of important economic benefits which will be of direct benefit to the local community. These key positive employment and consumer impacts include:

- The provision of a wider range of facilities which would increase convenience and price competition for residents and local workers.
- Improved customer amenity, design, and aesthetic for the residents by way of a new and modern facility.

ii. The proposed development is projected to employ around 399 persons (refer Table 9.1). Allowing for an estimated 10% of the total increase to be because of reduced employment at existing retail facilities, net additional jobs are estimated at 359.

iii. Based on average retail weekly earnings data released by the ABS in May 2024, the additional permanent employees would earn combined total salary/wages of some $17.4 million at the site, reflecting additional salary/wages for the local economy, as a direct result of the development.

iv. Estimated total capital costs for the construction phase of the development are $36.0 million. By using the appropriate ABS Input/output Multipliers that were last produced in 1996/97 and a deflated estimated total capital cost of construction of $15.45 million (i.e., in 1996/97 dollars), it is estimated that the construction period of the proposed development would create 108 construction jobs (refer Table 9.2).

v. Further jobs would be created from the supplier induced multiplier effects because of jobs for the on-going running of the proposed development as well as the construction phase, which may include both full-time and part-time positions. In total, 514 jobs are projected to be created in the broader community, based on ABS Input/output Multipliers (refer Table 9.3).

vi. Overall, 980 jobs are likely to be created both directly and indirectly because of the proposed Willows Crossing development.

vii. Jobs generated will include a number of youth employment opportunities with the supermarket, specialty shops gym and fast food, facilities in particular generally employing a large number of younger staff.

## TABLE 9.1. ESTIMATED ONGOING EMPLOYMENT

| Component | Total Floorspace (sq.m) | Employment Potential | | |
|---|---|---|---|---|
| | | Employm. per 1,000 sq.m | Indic. Total Jobs | Net Increase[1] |
| **Retail** | | | | |
| Supermarket | 1,800 | 50.0 | 90 | 81 |
| Retail Specialty Shops | 1,000 | 60.0 | 60 | 54 |
| Large Format Retail | 5,000 | 20.0 | 100 | 90 |
| **Total Retail** | **7,800** | | **250** | **225** |
| **Complementary Non-retail** | | | | |
| Non-retail Shopfronts | 200 | 40.0 | 8 | 7 |
| Gym | 400 | 25.0 | 10 | 9 |
| Childcare | 1,000 | 15.0 | 15 | 14 |
| Medical Suites | 4,500 | 15.0 | 68 | 61 |
| Fast Food PAD Site | 700 | 40.0 | 28 | 25 |
| **Total Complementary Non-retail** | **6,800** | | **129** | **116** |
| **Other** | | | | |
| Hotels | 2,500 | 1 per 5 beds | 20 | 18 |
| **Total Other** | **2,500** | | **20** | **18** |
| **Total** | **17,100** | | **399** | **359** |

*1. Indicates the estimated number of net additional ongoing jobs as a result of the proposed development*
*Source : Australian National Accounts: Input-Output Tables 1996-97*

## TABLE 9.2. ESTIMATED CONSTRUCTION-GENERATED EMPLOYMENT LEVELS

| Metric | Retail Floorspace | Commercial & Other Floorspace | Total |
|---|---|---|---|
| **Estimated Capital Costs of Construction** | | | |
| Estimated Capital Costs 2023/24 ($M)* | $12.1 | $23.9 | $36.0 |
| Estimated Capital Costs 1996/97 ($M) | $5.19 | $10.3 | $15.45 |
| **Direct Employment Generation** | | | |
| Construction Jobs per $1 million (2023/24) | 3.00 | 3.00 | 3.00 |
| **Total Construction Jobs[1]** | **36** | **72** | **108** |

*Source : Australian National Accounts: Input-Output Tables 1996-97*
*Employment totals include both full-time and part-time work. Indicates the estimated number of jobs over the life of the construction project plus ongoing multiplier effects, for the equivalent of one year*

## TABLE 9.3. ESTIMATED TOTAL EMPLOYMENT GENERATED

| Metric / Category | Est. Net Employment Increase[1] | Employment Multiplier Effects | Total Employment |
|---|---|---|---|
| **Ongoing Employment from Planned Floorspace** | | | |
| Retail | 225 | 214 | 439 |
| Complementary Non-retail | 116 | 110 | 225 |
| Other | 18 | 17 | 35 |
| **Total** | **359** | **340** | **699** |
| **Construction Phase** | | | |
| Direct Employment Generation | 108 | 173 | 281 |
| **Net Additional Employment** | **467** | **514** | **980** |

*1. Net increase includes an allowance for reduced employment levels at impacted centres estimated at 10% of the total increase*

## 9.3. Industry Trends

i. There has been increasing demand for integrated healthcare and convenience-oriented retail offerings.

ii. The nature of consumer demand continues to develop and evolve, reflecting social changes within society, such as:

- Increasing time pressures on working families.
- Population and income growth.
- The evolution of new retail formats and traders.
- Competitive retail developments and precincts.

iii. There is a strong need for convenience-based mixed-use developments that provide a comprehensive range of facilities within close proximity to work and home.

iv. Over the past decade, there has been an increasing trend towards convenience-based shopping. This trend has been largely driven by broader social trends that have resulted in consumers becoming more time poor, such as longer working hours and an increase in the number of women in the labour force.

v. Time pressures are ranked at the top of the list of issues that consumers face when undertaking their regular food and grocery shopping. As a result, there is growing demand for convenience-based developments that offer a range of uses within the same location to meet the needs of residents.

vi. Additionally, the growth of integrated healthcare supports the inclusion of a medical centre, responding to the public's preference for accessible, multidisciplinary health services. These trends underscore the development's strategic inclusion of retail and medical facilities, catering to a time-poor population that values accessibility and efficiency.

vii. The proposed development would be highly convenient, being located on a high-profile site, with excellent accessibility, and providing significant choice with a range of retail and non-retail uses planned.

## 9.4. Location

i. The subject site represents a logical location to provide a mixed-use integrated healthcare and retail development that will not impact on the trading capacity of surrounding facilities:

- The Willows Crossing site is ideally located near the new Toowoomba Hospital, offering substantial benefits for both healthcare delivery and community access.
- This proximity ensures that patients, healthcare providers, and visitors can easily access a broad array of services without the inconvenience of extensive travel.
- The site's connectivity to major transport routes further enhances its accessibility, making it a viable hub for both local and regional visitors.

- As part of the northern suburbs of Toowoomba, the development seamlessly integrates with existing and planned infrastructure, offering both immediate operational functionality and potential for future expansion.

- The site will benefit from both the immediate worker and resident population which is expected to significantly increase in the short to medium term. Driven by the completion of the new Toowoomba Hospital as well as the planned ~900 dwellings to the immediate east of the subject site.

## 9.5. Net Community Benefits

i. It is the conclusion of this report that a substantial net community benefit would result from the proposed Willows Crossing development. Offsetting the minimal trading impacts on some existing retailers, there are very substantial positive impacts including the following:

- Improvement in the range of retail and non-retail facilities available to local residents, this will lead to greater price competition.

- Access to a mixed-use development including uses such as a new childcare centre in the local area near a major employment hub (i.e. the new Toowoomba Hospital) ensuring families do not have to travel beyond their immediate area.

- The creation of additional choice within the surrounding area.

- The retention of demand currently being directed to other facilities situated beyond the trade area, thereby reducing the need for residents to travel further afield or leave to have their specific needs met.

- Improvement in the range of facilities available to residents by way of a new and modern development. The facility would be of a high-quality, as well as being in close proximity to workplaces, and places of residence. This will lead to greater choice and standard of services, as well as other factors price and choice competition.

- High quality design amenity, landscaping and finishing will ensure the local population has a strong affinity with the site.

- The creation of additional employment which would result from the project, both during the construction period, and more importantly, on an ongoing basis once the development is complete and operational. In total, some 1,012 jobs are likely to be created both directly and indirectly as a result of the Willows Crossing development. This includes a number of youth employment opportunities with retail developments generally employing a large number of younger staff.

ii. It is concluded that the combination of the substantial positive economic impacts serves to more than offset the trading impacts that could be anticipated for a small number of existing retailers. Further, the impacts would not threaten the hierarchy or viability of any centres given the significant residential and employment growth planned within the trade area.

## TABLE 5.1. SUMMARY OF POTENTIAL USES

| Category | Supportability Low \| Moderate \| High | GLA per Tenant (sq.m) | No. Tenants | Total GLA | Potential Tenant Types \| Brands |
|---|---|---|---|---|---|
| **Retail** | | | | **7,200** | |
| • Small supermarket/foodstore | High | 500 - 1,500 | 1 | 1,000 | IGA, Independent |
| • Retail Specialty | High | 120 | 8 | 1,000 | Food retail, café/takeaway, general, services |
| • Non-retail Specialty | High | 120 | 2 | 200 | Bank, real estate, travel agent |
| • LFR | High | 750 | 7 | 5,000 | Auto store, trade showroom |
| **Health & Fitness** | | | | **400** | |
| • Gym | High | 200 - 400 | 1 | 400 | Curves, Fitness First, Jetts Fitness, Plus Fitness |
| • Swim School* | Low | 800 | 0 | - | Independent |
| **Medical** | | | | **4,500** | |
| • Medical Centre | Low | 200 - 1,000 | 1 | 500 | IPN, Medical One, Myhealth, independent GP |
| • Ancillary Medical Uses | High | 3,000 - 4,000 (site) | 1 | 4,000 | Day hospital, cancer centre, other specialist/allied health |
| **Pad Sites** | | | | **1,700** | |
| • Service Station | High | 1,000 (site) | 1 | 1,000 | Shell, Liberty, United, Ampol, BP |
| • Fast Food | Low \| Moderate | 350 | 2 | 700 | Hungry Jacks, Red Rooster, Oporto, GYG |
| **Short Term Accommodation** | | | | **2,500** | |
| • Hotel | Moderate | 2,500 | 1 | 2,500 | Budget short stay offer |
| **Other** | | | | **1,500** | |
| • Childcare Centre | Low \| Moderate | 1,000 | 1 | 1,000 | Goodstart, Guardian, G8, Nido, Independent |
| • Bar/Tavern | Moderate | 200 - 1,500 | 1 | 500 | Independent |
| **Total Uses** | | | | **17,800** | |

**Contact Us**
(02) 8248 0100
Level 27 | 25 Martin Place
Sydney NSW 2000
locationiq.com.au