



Toowoomba Regional Council

Demographic Projections

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I.0 Introduction

I.1 Objectives

The objectives in preparing the demographic and workforce projections for TRC are:

- Produce defensible and reliable projections by small area within the TRC for resident and workforce projections to 2031.
- Highlight and document assumptions utilised in the projections achieving sign off of these inputs by TRC as the process is undertaken.
- Produce the projections in a timely and cost-effective manner.
- Make best possible use of existing datasets and modelling output.

I.2 Competed Tasks

A demographic assumption briefing paper was prepared to inform an assumptions workshop held with key staff members of the Toowoomba Regional Council. These assumptions have been included in the current projections.

A draft report was presented to TRC for evaluation, further input and sign off.

I.3 Deliverables

This report supplements the excel workbook and GIS shapefile that details the projections at an SA1 and SA2 level.

2.0 TRC Population Projections to 2031

2.1 Population Projections

Table 1 outlines the historical population growth in the TRC area to from 2001 to 2011. This can be used for comparison purposes when assessing future growth projections.

Table 1 Historic Populations

	Toowoomba Regional Council
2001	137,185
2006	146,611
2011	154,903
Annual Growth	
2001-06	1,863
2006-11	1,658

Figures 6 and 7 (Appendix 1) also provides details of residential growth in the period 2006 to 2011 for comparison and evaluation purposes.

2.2 Population Projections

The following table and figures detail the derived population projections by SA2, growth and building type. Table 2 provides broad notes and assumptions utilised in the projections. Detailed notes and assumptions are listed in Section 4.

TRC is projected to have the following population profile (ERP) over the next 20 years:

- 2011 – 155,444
- 2016 – 168,235
- 2021 – 182,551
- 2026 – 197,173
- 2031 – 210,484

Table 2 Notes and Assumptions – Population Projections

SA2	Likely to reach close to build out during projection horizon	Notes
Crows Nest - Rosalie	No	Growth aligned to market demand, capacity of developers to deliver and appropriate council approvals.
Jondaryan	No	Growth aligned to market demand, capacity of developers to deliver and appropriate council approvals.
Millmerran	No	Growth aligned to market demand, capacity of developers to deliver and appropriate council approvals.
Pittsworth	No	Growth aligned to market demand, capacity of developers to deliver and appropriate council approvals.
Clifton - Greenmount	No	Growth aligned to market demand, capacity of developers to deliver and appropriate council approvals.

SA2	Likely to reach close to build out during projection horizon	Notes
Cambooya - Wyreema	Likely build out of rural residential	Growth of the townships aligned to market demand, capacity of developers to deliver and appropriate council approvals.
Darling Heights	Likely to be close to capacity.	Major population growth area with an expected increase of over 10,000 over the next 20 years.
Drayton - Harristown	No – significant stock will be in place post 2031.	A major growth sector that will be triggered when Darling Heights approaches capacity. Significant growth post 2031.
Gowrie (Qld)	No	Growth aligned to market demand, capacity of developers to deliver and appropriate council approvals.
Highfields	No – significant stock will be in place post 2031.	Major population growth area with an expected increase of over 10,000 over the next 20 years.
Middle Ridge	Likely to be close to capacity.	Future development will rely on infill and intensification.
Newtown (Qld)	Likely to be close to capacity.	Future development will rely on infill and intensification.
North Toowoomba - Harlaxton	Likely to be close to capacity.	Future development will rely on infill and intensification.
Rangeville	Likely to be close to capacity.	Future development will rely on infill and intensification.
Toowoomba - Central	Redevelopment potential.	Future development will rely on infill and intensification. Assumes 1,000 units to be developed over the next 20 years.
Toowoomba - East	.Some redevelopment potential.	Future development will rely on infill and intensification.
Toowoomba - West	No – some remaining development capacity post 2031.	Major population growth area with an expected increase of over 10,000 over the next 20 years.
Wilsonton	No – some remaining development capacity post 2031.	Growth aligned to market demand, capacity of developers to deliver and appropriate council approvals.

Table 3 - Population Projections by SA2

SA2	Popo2011	SFD2011	Units 2011	Pop2016	SFD2016	Units2016	Pop2021	SFD2021	Units2021	Pop2026	SFD2026	Units2026	Pop2031	SFD2031	Units 2031	Growth 2031
Crows Nest - Rosalie	8,232	2,908	112	8,482	3,000	115	8,732	3,093	118	8,982	3,185	121	9,232	3,278	123	1,000
Jondaryan	7,556	2,395	101	7,787	2,481	104	8,019	2,566	106	8,250	2,652	109	8,481	2,737	112	925
Millmerran	3,195	1,052	65	3,289	1,087	66	3,383	1,121	67	3,476	1,156	68	3,570	1,191	69	375
Pittsworth	5,422	1,754	80	5,576	1,811	82	5,730	1,868	84	5,883	1,925	85	6,037	1,981	87	615
Clifton - Greenmount	4,613	1,595	68	4,738	1,641	69	4,863	1,688	70	4,988	1,734	72	5,113	1,780	73	500
Cambooya - Wyreema	5,877	1,790	19	6,377	1,978	19	6,877	2,167	20	7,377	2,355	20	7,877	2,544	20	2,000
Darling Heights	12,713	2,991	1,387	15,312	3,878	1,529	19,202	5,228	1,708	21,737	6,092	1,848	22,938	6,477	1,951	10,225
Drayton - Harristown	10,433	2,852	1,083	10,479	2,869	1,084	10,571	2,903	1,085	12,668	3,678	1,109	15,791	4,833	1,144	5,358
Gowrie (Qld)	5,687	1,787	4	6,228	1,987	10	6,768	2,187	16	7,309	2,387	23	7,850	2,587	29	2,163
Highfields	11,495	3,567	57	14,619	4,687	146	17,743	5,807	236	20,347	6,740	310	21,909	7,300	355	10,414
Middle Ridge	6,760	2,043	102	7,248	2,218	116	7,658	2,365	128	7,989	2,484	137	8,126	2,533	141	1,366
Newtown (Qld)	9,855	3,036	896	9,871	3,037	904	9,918	3,038	928	10,043	3,043	992	10,168	3,048	1,057	313
North Toowoomba - Harlaxton	6,063	1,972	313	6,704	2,195	342	7,344	2,418	371	7,985	2,640	399	8,626	2,863	428	2,563
Rangeville	8,438	2,766	393	8,557	2,809	396	8,676	2,851	400	8,794	2,894	403	8,913	2,936	407	475
Toowoomba - Central	13,704	4,085	1,385	13,882	4,085	1,487	14,237	4,085	1,690	14,770	4,085	1,994	15,481	4,085	2,400	1,777
Toowoomba - East	10,384	2,940	845	10,525	2,960	896	10,722	2,979	978	10,918	2,999	1,061	11,172	3,019	1,176	788
Toowoomba - West	11,737	3,552	170	14,892	4,683	260	18,046	5,814	350	21,201	6,945	440	24,355	8,075	531	12,618
Wilsonton	13,280	4,158	837	13,672	4,303	841	14,064	4,448	846	14,456	4,593	850	14,848	4,738	855	1,568
Total	155,444	47,243	7,917	168,235	51,707	8,466	182,551	56,625	9,200	197,173	61,586	10,042	210,484	66,005	10,957	55,040

Figure 1 - Projected Population Growth 2011 to 2031

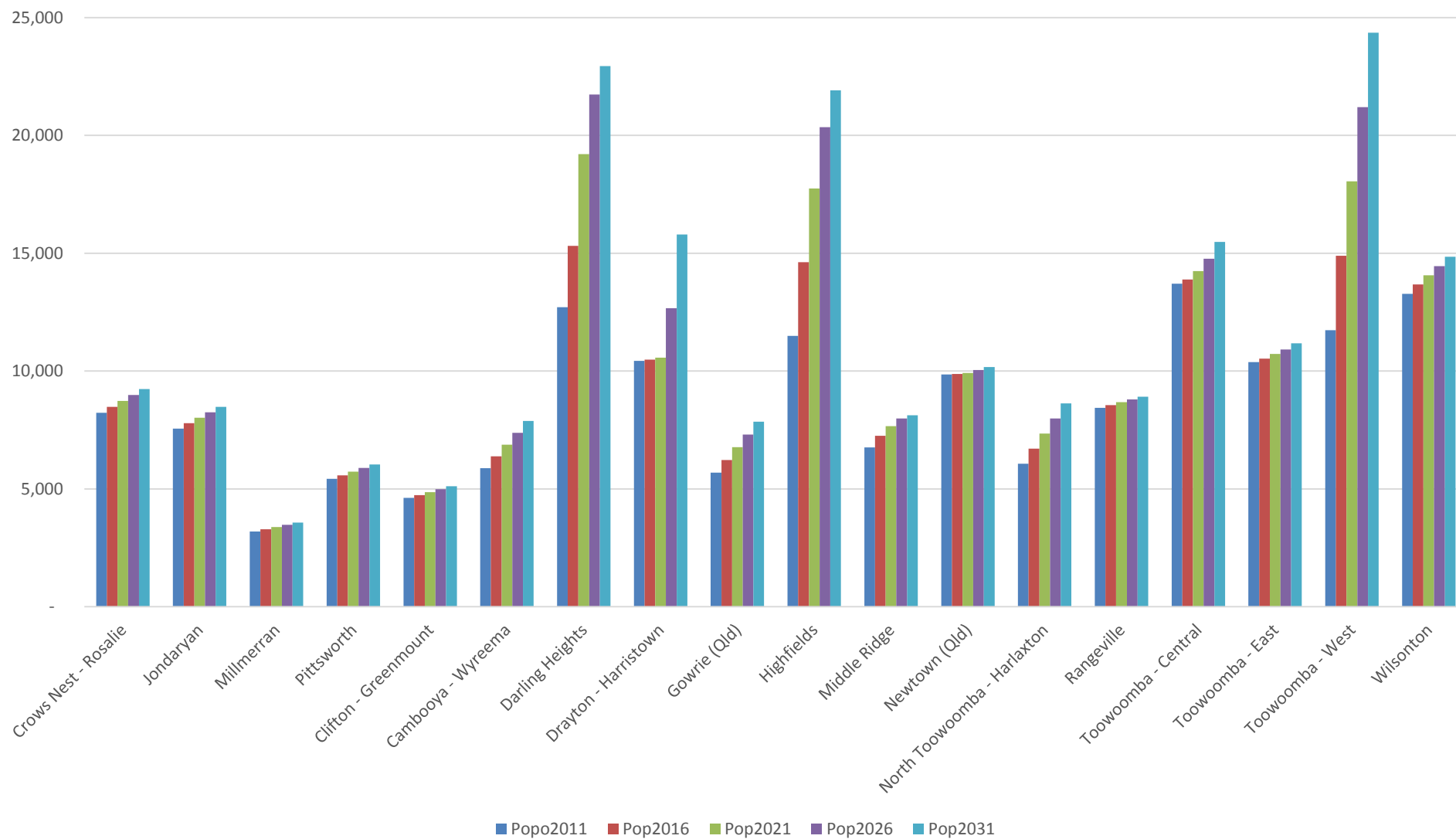
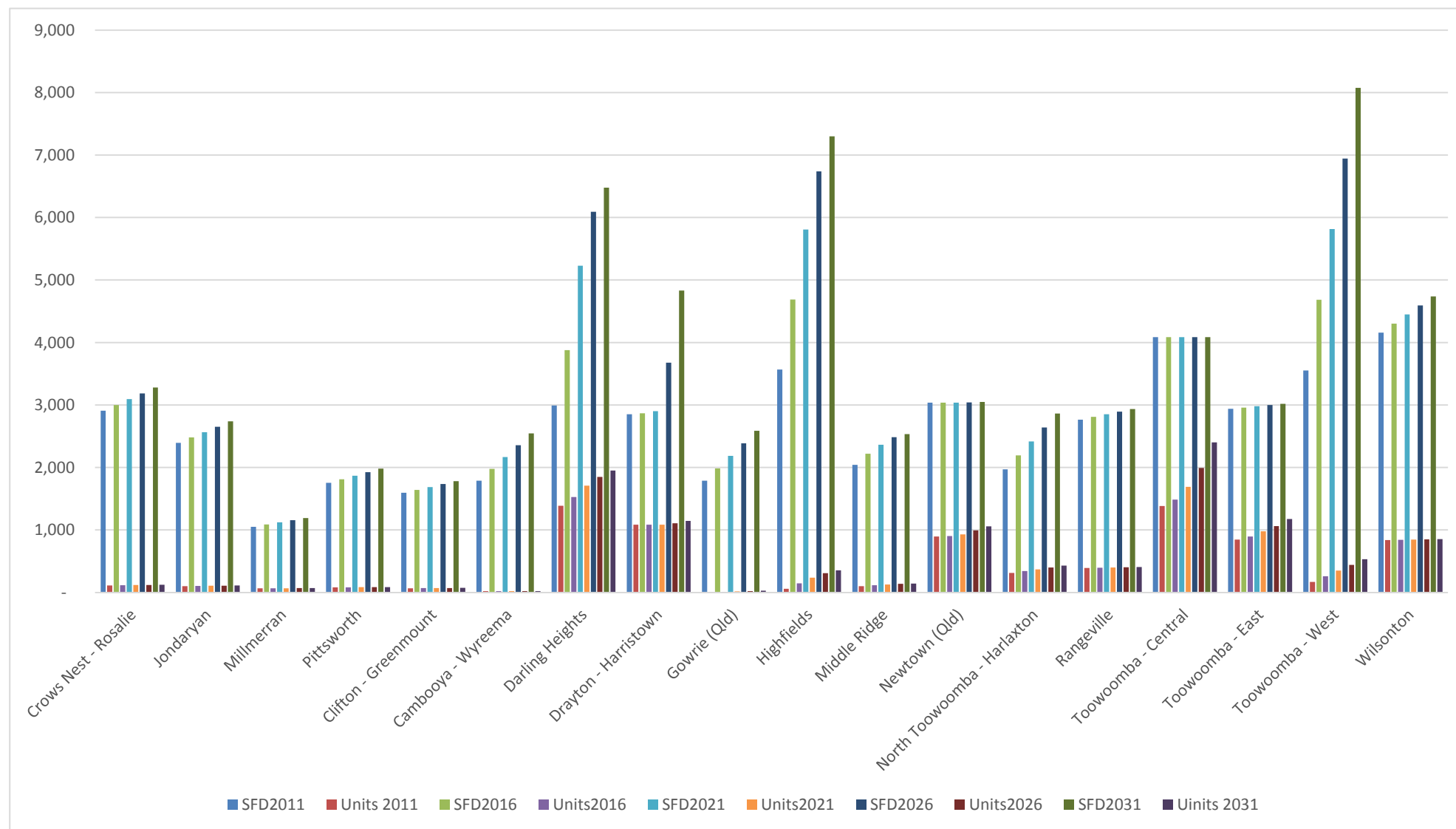


Figure 2 - Dwelling Type Projections by SA2



3.0 Employment Projections to 2031

3.1 Labour Force Participation

The current labour force participation rate in 2011 was 64.3%. This is expected to remain steady over the projection period.

3.2 Employment Projections

Table 4 is a summary by SA2.

Table 4 Employment Projections, Total by SA2

SA2	2011	2016	2021	2026	2031
Crows Nest - Rosalie	2,354	2,396	2,439	2,482	2,524
Jondaryan	4,484	4,622	4,759	4,896	5,033
Millmerran	1,420	1,461	1,503	1,545	1,586
Pittsworth	1,964	2,020	2,076	2,131	2,187
Clifton - Greenmount	1,328	1,364	1,400	1,436	1,472
Cambooya - Wyreema	639	686	733	780	827
Darling Heights	4,008	4,306	4,826	5,236	5,757
Drayton - Harristown	4,146	4,274	4,602	5,693	7,193
Gowrie (Qld)	379	415	451	487	524
Highfields	2,018	2,585	3,153	3,625	3,909
Middle Ridge	840	867	890	908	917
Newtown (Qld)	2,659	2,663	2,676	2,709	2,743
North Toowoomba - Harlaxton	2,020	2,294	2,567	2,840	3,114
Rangeville	905	917	930	943	956
Toowoomba - Central	17,614	19,937	22,331	23,814	24,713
Toowoomba - East	4,996	5,076	5,248	5,420	5,685
Toowoomba - West	3,949	5,108	6,820	9,188	11,440
Wilsonton	5,706	5,899	6,091	6,284	6,476
Total	61,429	66,890	73,495	80,418	87,055

The following table and figures detail the derived employment projections by SA2 and employment type. Detailed notes and assumptions are listed in Section 4.

Table 5 Notes and Assumptions – Employment Projections

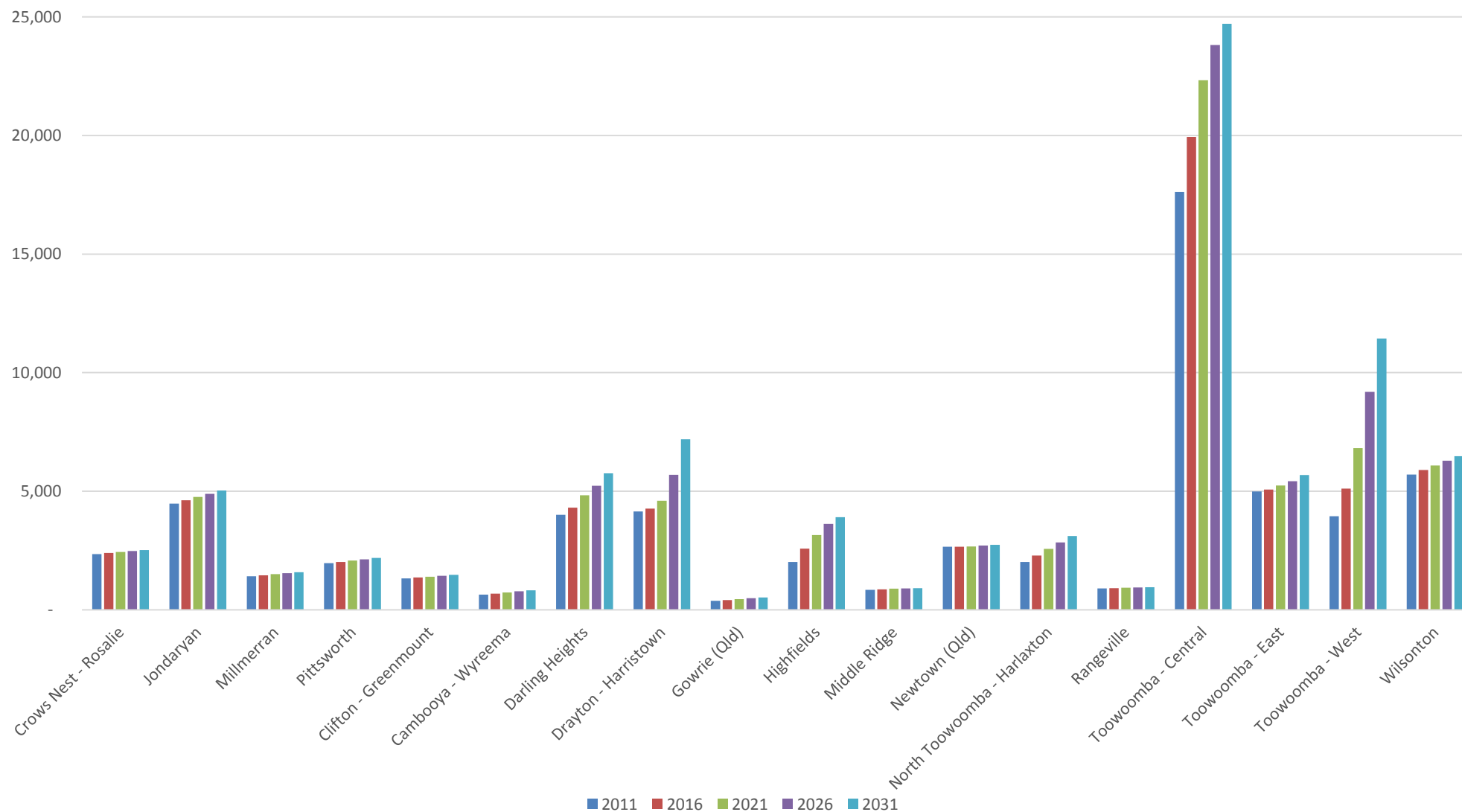
SA2	Notes
Crows Nest - Rosalie	Employment growth in line with known projects and population growth.
Jondaryan	Employment growth in line with known projects and population growth.
Millmerran	Employment growth in line with known projects and population growth.
Pittsworth	Employment growth in line with known projects and population growth.
Clifton - Greenmount	Employment growth in line with known projects and population growth.
Cambooya - Wyreema	Employment growth in line with known projects and population growth.

SA2	Notes
Darling Heights	Major population growth area will generate significant increase in local population servicing employment (retail, schools, and services).
Drayton - Harristown	Major population growth area will generate significant increase in local population servicing employment (retail, schools, and services). Infill and intensification of industrial and employment areas. Significant growth post 2031.
Gowrie (Qld)	Employment growth in line with known projects and population growth.
Highfields	Major population growth area will generate increase in local population servicing employment (retail, schools, and services).
Middle Ridge	Employment growth in line with known projects and population growth.
Newtown (Qld)	Employment growth in line with known projects and population growth.
North Toowoomba - Harlaxton	Infill and intensification of industrial and employment areas.
Rangeville	Employment growth in line with known projects and population growth.
Toowoomba - Central	The CBD will be the venue for major employment growth and will host a significant increase in white collar employment. Significant increase in the retail footprint serving local and regional residents. Infill and intensification of industrial and employment areas.
Toowoomba - East	Employment growth in line with known projects and population growth.
Toowoomba - West	CWEA will be the venue for major employment growth and will host a significant amount of industrial and related services employment. Estimated to be 3,000 jobs in 2031 with significant capacity for growth after this time. Significant increase in the retail footprint serving local and regional residents.
Wilsonton	Employment growth in line with known projects and population growth.

Table 6 Employment Projections by category and SA2

SA2	Pop2011	Pop2031	Retail 2011	Ind2011	Other2011	Retail2016	Ind2016	Other2016	Retail 2021	Ind2021	Other2021	Retail2026	Ind2026	Other2026	Retail2031	Ind2031	Other2031	Total2031	Total 2011	WPP
Crows Nest - Rosalie	8,232	9,232	209	159	1,986	218	162	2,017	226	165	2,048	234	168	2,079	243	171	2,110	2,524	2,354	2,325
Jondaryan	7,556	8,481	428	1,266	2,791	441	1,305	2,876	454	1,343	2,962	467	1,382	3,047	480	1,421	3,132	5,033	4,484	4,415
Millmerran	3,195	3,570	175	481	765	180	495	787	185	509	809	190	523	832	195	537	854	1,586	1,420	1,408
Pittsworth	5,422	6,037	460	501	1,003	473	515	1,032	486	529	1,060	499	544	1,089	512	558	1,117	2,187	1,964	1,951
Clifton - Greenmount	4,613	5,113	121	192	1,015	124	198	1,042	127	203	1,070	131	208	1,097	134	213	1,125	1,472	1,328	1,304
Cambooya - Wyreema	5,877	7,877	22	42	575	23	45	618	25	48	660	26	50	703	28	53	746	827	639	614
Darling Heights	12,713	22,938	1,656	29	2,323	1,756	30	2,520	1,951	41	2,834	2,099	47	3,090	2,294	58	3,404	5,757	4,008	3,822
Drayton - Harristown	10,433	15,791	428	2,533	1,185	430	2,652	1,191	435	2,965	1,203	498	3,877	1,319	591	5,113	1,489	7,193	4,146	4,154
Gowrie (Qld)	5,687	7,850	0	45	334	0	49	366	0	54	398	0	58	430	0	62	461	524	379	339
Highfields	11,495	21,909	683	45	1,291	971	159	1,456	1,259	273	1,621	1,499	368	1,758	1,643	425	1,841	3,909	2,018	2,011
Middle Ridge	6,760	8,126	70	10	760	78	6	783	85	3	802	89	-	819	92	-	825	917	840	828
Newtown (Qld)	9,855	10,168	1,595	211	852	1,598	212	854	1,605	213	858	1,626	215	868	1,646	218	879	2,743	2,659	2,548
North Toowoomba - Harlaxton	6,063	8,626	285	1,001	734	323	1,188	782	361	1,376	830	399	1,564	877	438	1,751	925	3,114	2,020	2,016
Rangeville	8,438	8,913	139	-	766	141	-	776	143	-	787	145	-	798	147	-	809	956	905	881
Toowoomba - Central	13,704	15,481	6,010	2,221	9,383	7,284	2,253	10,400	8,379	2,294	11,659	9,062	2,324	12,429	9,410	2,349	12,954	24,713	17,614	17,583
Toowoomba - East	10,384	11,172	485	16	4,494	494	16	4,566	511	16	4,721	528	16	4,876	554	17	5,115	5,685	4,996	5,012
Toowoomba - West	11,737	24,355	156	3,082	711	217	4,089	802	279	5,647	893	342	7,862	984	404	9,961	1,075	11,440	3,949	3,847
Wilsonton	13,280	14,848	411	3,230	2,065	420	3,367	2,112	429	3,504	2,158	438	3,641	2,205	448	3,778	2,251	6,476	5,706	5,669
Total	155,444	210,484	13,333	15,063	33,033	15,171	16,740	34,979	16,941	19,182	37,373	18,272	22,846	39,300	19,257	26,684	41,114	87,055	61,429	60,727

Figure 3 - Employment Growth by SA2



4.0 Notes and Assumptions by SA2

This section provides the detailed notes and assumptions that underpin the population and employment projections by SA2.

This report is accompanied by a Microsoft Excel workbook and a GIS Shapefile that provide population and employment delineation by SA1 for the reporting periods.

These estimates would be reviewed regularly to make best use of newly published data and avoid decisions based on erroneous or outdated information. The review period should be at least every five years (coinciding with the release of census data) or more frequently for those areas undergoing rapid resident and/or employment growth.

A review should also be undertaken prior to the planning of major changes to the capital works or infrastructure programs.

4.1 Crows Nest - Rosalie

4.1.1 Discussion

A low growth rural area with low population growth rates driven primarily by the cost of housing and local lifestyle. Key features include:

	2011	2031	Change
Population	8,232	9,232	12.1%
Workforce (EFT)	2,354	2,524	7.2%

4.1.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in Crows Nest in line with zoning and approvals.
2 -E	Employment growth in line with population growth with the majority of additional services located in Crows Nest.
3 -E	Employment growth is lower than population growth as modest totals do not reach certain provision thresholds.
4 -E	Footloose employment projected to increase in line with population profile.

4.2 Jondaryan

4.2.1 Discussion

A low growth rural area with low population growth rates driven primarily by the cost of housing and local lifestyle. Key features include:

	2011	2031	Change
Population	7,556	8,481	12.1%
Workforce (EFT)	4,484	5,033	12.2%

4.2.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in Oakey in line with zoning and approvals.
2 -E	Employment growth in line with population growth with the majority of additional services

Note	Item
	located in Oakey.
3 -E	Investment and utilisation of the army base will remain constant over the projection period.
4 -E	Footloose employment projected to increase in line with population profile.

4.3 Millmerran

4.3.1 Discussion

A low growth rural area with low population growth rates driven primarily by the cost of housing and local lifestyle. Key features include:

	2011	2031	Change
Population	3,195	3,570	11.7%
Workforce (EFT)	1,420	1,586	11.7%

4.3.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in Millmerran (town) in line with zoning and approvals.
2 -E	Employment growth in line with population growth with the majority of additional services located in Millmerran.
3 -E	Footloose employment projected to increase in line with population profile.

4.4 Pittsworth

4.4.1 Discussion

A low growth rural area with low population growth rates driven primarily by the cost of housing and local lifestyle. Key features include:

	2011	2031	Change
Population	5,286	5,901	11%
Workforce (EFT)	1,928	2,152	11%

4.4.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in Pittsworth (town) in line with zoning and approvals.
2 -E	Employment growth in line with population growth with the majority of additional services located in Pittsworth.
3 -E	Footloose employment projected to increase in line with population profile.

4.5 Clifton - Greenmount

4.5.1 Discussion

A modest growth rural area with modest levels of local employment. Key features include:

	2011	2031	Change
Population	4,613	5,113	10.8%
Workforce (EFT)	1,328	1,472	10.8%

4.5.2 Assumptions and Notes

Note	Item
1 -P	Modest growth community with moderate levels of growth in line with zoning and approvals.
2 -E	Employment growth in line with population growth.
3 -E	Footloose employment projected to increase in line with population profile.

4.6 Cambooya - Wyreema

4.6.1 Discussion

A modest growth rural area with modest levels of local employment. Key features include:

	2011	2031	Change
Population	5,877	7,877	34.0%
Workforce (EFT)	639	827	29.4%

4.6.2 Assumptions and Notes

Note	Item
1 -P	A moderate growth fringe / rural community with moderate levels of growth in line with zoning and approvals.
2 -E	Employment growth lower than population growth due to small scale of towns and dispersed nature of rural residential.
3 -E	Footloose employment projected to increase in line with population profile.
4-P	Assumed that the rural residential area will continue to be subdivided over time and that the identified Emerging Communities area will be developed at a gross density of 2.2 dwellings per Ha.
5-P	Small towns will continue to grow in line with approvals and historic trends. Wyreema 2011- 1,941, 2031 – 2,541 Cambooya 2011- 1,087, 2031 – 1,487

4.7 Darling Heights

4.7.1 Discussion

A major growth area with low levels of local employment. Key features include:

	2011	2031	Change
Population	12,713	22,938	80.4%
Workforce (EFT)	4,008	5,757	43.6%

4.7.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in line with zoning and approvals.
2 -E	Major retail and service centre will expand in line with regional population (1,562 in 2011 to 1,943 in 2031).
3 -P	Growth area to the south of the University (SA1 – 441620, 44619) will be developed at 14 dwellings per Ha in line with current trends with the existing road network facilitating higher net yields.
4-E	Growth area to the south of the University (SA1 – 441620, 44619) will host super market anchored retail centre, child care and school in the period post 2021.
5-E	University staff numbers will increase from 1,350 to 2,000 in the projection period

Note	Item
6-E	Footloose employment projected to increase in line with population profile.

4.8 Drayton - Harristown

4.8.1 Discussion

A major growth area with high levels of local and regional employment. Key features include:

	2011	2031	Change
Population	10,433	15,791	51.4%
Workforce (EFT)	4,146	7,193	73.5%

4.8.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in line with zoning and approvals. The majority will occur post 2021.
2 -E	Industrial Area is estimated to host 2,533 EFT in 2011. Assumed to increase by 75% in the period to 2031 (to 4,913) as vacant sites are occupied and more intensive uses evolve.
3 -P	Growth area to the south of SA2 (SA1 – 44713, 44717) will be developed at 14 dwellings per Ha in line with current trends with the existing road network facilitating higher net yields. Development capacity will remain post 2031.
4-E	Growth area to the south (SA1 – 44717) will host super market anchored retail centre, child care and school in the period post 2026.
5-E	Footloose employment projected to increase in line with population profile.

4.9 Gowrie

4.9.1 Discussion

A modest growth dormitory area with low levels of local employment. Key features include:

	2011	2031	Change
Population	5,687	7,850	38%
Workforce (EFT)	379	524	36%

4.9.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in and the identified communities in line with zoning and approvals.
2 -E	Employment growth in line with population growth with key employment occurring in populated areas.
3 -E	Employment numbers are modest due to lack of employment lands.
4 -E	Footloose employment projected to increase in line with population profile.

4.10 Highfields

4.10.1 Discussion

A fast growth dormitory area with modest levels of local employment. Key features include:

	2011	2031	Change
Population	11,495	21,909	90.6%
Workforce (EFT)	2,018	3,909	93.7%

4.10.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in and around Highfields in line with zoning and approvals.
2 -E	Employment growth in line with population growth with key employment occurring in the centre and designated industrial areas.
3 -E	Employment numbers are modest due to lack of expansive/additional employment lands.
4 -E	Footloose employment projected to increase in line with population profile.

4.11 Middle Ridge

4.11.1 Discussion

A modest growth dormitory area with modest levels of local employment. Key features include:

	2011	2031	Change
Population	6,760	8,126	20.2%
Workforce (EFT)	840	917	9.1%

4.11.2 Assumptions and Notes

Note	Item
1 -P	Modest growth community with moderate levels of growth attributed to remaining development sites.
2 -E	Employment growth lower than population growth due to lack of employment lands.
3 -E	Footloose employment projected to increase in line with population profile.

4.12 Newtown

4.12.1 Discussion

A very low growth dormitory area with modest levels of local employment. Key features include:

	2011	2031	Change
Population	9,855	10,168	3.2%
Workforce (EFT)	2,659	2,743	3.2%

4.12.2 Assumptions and Notes

Note	Item
1 -P	Low growth community with low levels of growth attributed to infill and redevelopment.
2 -E	Employment growth in line with population growth with key employment occurring in populated areas, centres and schools.
3 -E	Footloose employment projected to increase in line with population profile.

4.13 North Toowoomba - Harlaxton

4.13.1 Discussion

A modest growth dormitory area with low levels of local employment. Key features include:

	2011	2031	Change
Population	6,063	8,626	42.3%
Workforce (EFT)	2,020	3,114	54.1%

4.13.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in the areas identified as Emerging Communities. The northern parcel is assumed to host 480 dwellings (53 Ha at 9 dwelling per Ha to allow for constraints). The southern parcel is assumed to host 480 dwellings with 2/3rds of the 173Ha assumed to be undevelopable and the remainder developed at 9 dwellings per Ha net.
2 -E	Industrial zones will remain as employment lands will minimal reuse as residential. Intensification will occur over time.
3 -E	Primary school will be established in the north of the area in the period 2021 to 2026.
4 -E	Footloose employment projected to increase in line with population profile.

4.14 Rangeville

4.14.1 Discussion

A low growth dormitory area with modest levels of local employment. Key features include:

	2011	2031	Change
Population	8,438	8,913	5.6%
Workforce (EFT)	905	956	5.6%

4.14.2 Assumptions and Notes

Note	Item
1 -P	Low growth community with low levels of growth attributed to mainly to remaining development sites.
2 -E	Employment growth in line with population growth with key employment occurring in populated areas and schools.
3 -E	Footloose employment projected to increase in line with population profile.

4.15 Toowoomba Central

4.15.1 Discussion

A major employment area with high levels of local and regional employment. Key features include:

	2011	2031	Change
Population	13,704	15,481	13%
Workforce (EFT)	17,614	24,713	40.3%

The CBD (SA1 45601 to 45606) only numbers are:

	2011	2031	Change
Population	2,264	3,591	58.6%
Workforce (EFT)	13,964	20,698	51%

4.15.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in the CBD (SA1 45601 to 45606) in line with the intent of the CBD master plan. A total increase of 850 units (net) is projected for this area with 70% of development occurring post 2021. Other areas will be subject to small scale residential redevelopment and infill.
2 -E	Retail jobs in the CBD will increase by 59% over the projection period (from 5,643 to 9,006) with the major contributor being the approved expansion to Grand Central.
3 -P	Hospital precinct employment is expected to increase from 1,400 EFT in 2011 to 1,650 in 2031.
4-E	CBD office and other employment is expected to increase from 6,390 in 2011 to 9,660 in 2031.
5-E	Footloose employment projected to increase in line with population profile.
6-E	Industrial employment is expected to remain constant over the projection period.
7-E	In total the CBD (the SA1 defined in note 1) accounted for 13,939 jobs in 2011 (7,549 retail/industrial and 6,390 office/related) with 3,522 distributed throughout the remainder of the Toowoomba Central SA2 (inc the hospital) – for a total of 17,461 EFT. In 2031 the CBD is projected to host 20,686 EFT jobs, with 52% of the growth of 6,730 jobs (3,460) being in the retail and industrial sectors and 3,270 being office/related employment. The employment of the balance area is 3,875 (inc the hospital) for a total of 24,543 in the SA2.

4.16 Toowoomba - East

4.16.1 Discussion

A low growth area with infill and redevelopment accounting for 315 additional dwellings in the period to 2031. Key features include:

	2011	2031	Change
Population	10,384	11,172	7.6%
Workforce (EFT)	4,996	5,685	13.8%

4.16.2 Assumptions and Notes

Note	Item
1 -P	150 units to be established to the east of the CBD in the period to 2031.
2 -E	48% increase in employment on the eastern fringe of the CBD attributed to additional office and mixed use development. (SA1 5711 2011- 1,334, 2031 – 1,900).
3 -E	Major schools in the area to increase in line with regional population growth.
4 -E	Footloose employment projected to increase in line with population profile.

4.17 Toowoomba - West

4.17.1 Discussion

A major population and employment growth area shaped by zoned land available for development, indicated growth precincts and two major industrial/employment areas. Key features include:

	2011	2031	Change
Population	11,737	24,355	107.5%
Workforce (EFT)	3,949	11,440	189.7%

4.17.2 Assumptions and Notes

Note	Item
1 -E	CWEA employment split by SA1. Distributed by area with 38% to the northern SA1 (5818). Projections for CWEA discussed in more detail. Total CWEA employment in 2031 – 5,569.
2 -E	Industrial Area in the vicinity of the current airport is estimated to host 3,020 EFT in 2011. Assumed to increase by 38% in the period to 2031 (to 4,168) as vacant land is utilised, sites are occupied by more intensive uses, and space consumptive/logistic uses relocate to CWEA. Airport is assumed to be on operation in 2031 in its current (or expanded) role.
3 -P	Emerging communities assumed to be developed for residential purposes at a net density of 8 dwelling per Ha gross.
4 - E	Neighbourhood scale centre assumed to be developed in emerging community's precinct in the period 2024 to 2031.
5 - P	All Residential Living and Residential Choice sites will be developed at a gross density of 8 dwellings per Ha. This accounts for local constraints, local parks, drainage reserves, road reserves etc.
6 - P	Toowoomba West will achieve 95% build out of emerging communities, Res Choice and Res Living zones by 2031. This will be driven mainly by proximity to established services and major employment precincts.
7 -E	Quarries remain in operation to 2031.
8 -E	Industrial area south of Euston Road assumed to host 200 EFT by 2031.
9 -E	Footloose employment projected to increase in line with population profile.

4.18 Charlton Wellcamp Enterprise Area

The Charlton Wellcamp Enterprise Area (CWEA) is a large designated employment precinct to the west of the Toowoomba metro urban area. The land area defined by the current zoning is:

- High Impact Industry – 476 Ha
- Medium Impact Industry – 1,182 Ha
- Low Impact Industry – 133Ha
- Local Centre - 9 Ha
- Community Purposes (mainly road corridors) – 167 Ha
- Open Space – 133 Ha

The CWEA has an area of 2,101Ha of which 1,800 Ha is employment hosting (centre and industrial zones). On the basis of broad employment estimates of 8 to 12 jobs per Ha the CWEA has the capacity to host 14,400 to 21,600 EFT jobs when the precinct reaches build out.

4.18.1 Development and Enterprise Sites

To date three major development proponents are present in the CWEA:

- Brisbane West International Airport and Business Park – 928 Ha (approx.) with additional lands external to the designated CWEA boundary. On the basis of the published master plan, RPS have made the following land use area estimates:
 - » Airport precinct (airside, groundside and some industrial) – 320Ha

- » Business Park and Industrial (Business park, industrial, bulky goods etc) – 481Ha
- » Quarry – 127Ha (assumed to be redeveloped as business/industrial in the long term)
- Witmark Industrial Park – 90Ha (advertised at over 100 Ha¹, it is possible the estate will be expanded over time).
- Interlink SQ (inland port) – 153 Ha (advertised at 200 Ha², it is possible the estate will be expanded over time).

The balance enterprise/employment area is therefore in the order of 626Ha.

The major variable is the Airport and related business park. As a point of comparison, the Canberra Airport employs about 1,000 people in day to day operation of the Airport 'proper' and caters to 1.8 million passengers. The non-aviation area (mainly defence and government office space) host approximately 10,000 EFT jobs. The Gold Coast airport has a core airport employment base of 1,700 jobs (with 2.3 million passengers).

This assessment assumes a total Airport employment (at capacity) of 1,400 jobs as the Brisbane West Airport has additional areas for industrial uses (presumably aviation related) and is expected to have a great role in maintenance that either Canberra or Gold Coast.

The Brisbane West Airport Business Park will possibly have a small number of dedicated office buildings (unlike Canberra and the Gold Coast that host defence/government and a University respectively). The buildings will likely be large scale / low employment density in the early years with businesses becoming more diverse over time and in line with the overall economic/market performance of the precinct.

4.18.2 Risk Assessment and Demand Triggers

- External Decision Makers – investment decisions will be made Governments in Brisbane and Canberra (infrastructure) and major multi national companies (gas).
- External Opportunity Maximisation – Inland port requires the Ports of Brisbane and Darwin to maximise the opportunities provided by the inland rail.
- Gas sector business model – the business model adopted by the gas businesses needs to favour Toowoomba and the capacity of the CWEA. Includes Toowoomba as a base for FIFO workers, Toowoomba as an effective air/road entry point for the gas fields, major service and allied industry based in Toowoomba.
- Use of Technology – For Toowoomba to be a cost effective host for food services/processing/value add technology must be used as a substitute for Australia high labour costs. This will require a small, highly skilled and educated workforce.
- Water - food services/processing/value add must be able to effective function with the likely and available supply of water.

4.18.3 Factors Affecting Employment Assessments

It is not possible to know to any degree of certainty how quickly (or to what extent) the CWEA will develop. Consequently regular (annual) business and employment audits should be undertaken to track the actual establishment of businesses, the industries they serve and the level of employment.

¹ <http://www.fkg.com.au/Development/Property-for-sale-lease.aspx>

² <http://www.freightterminals.com.au/>

4.18.4 Timing

It is assumed that 2/3rds of the projections to 2031 will occur post 2021.

4.18.5 Sensitivity

Given the scale of the investments and related assumptions the adopted figure has an assumed sensitivity of plus or minus 75%. If the major investments do not occur the projected employment could be reduced by 75%. Conversely the employment numbers could increase by up to 75% if every opportunity is fully exploited.

The above noted assumptions have been utilised to produce the following employment projections for 2031 and capacity.

Table 7 CWEA Employment Projections

Precinct	Area (Ha)	Employment at Capacity	Proportion of Employment in place at 2031	Employment in place at 2031	Required triggers to support assumptions
Inland Port	153	1,224	100%	1,224	Inland Rail, Brisbane Port expansion, Darwin Port expansion, timing of investment (by 2016), acceptable infrastructure charges, Toowoomba bypass and competitive business.
Witmark Industrial Park	90	720	100%	720	General economic climate (gas, inland rail etc), Toowoomba Bypass
Other	626	5,008	20%	1,001	Major projects are successful, general economic conditions
Airport – day to day operations	320	1,400	50%	700	Market demand, gas industry, Toowoomba bypass, Inland Rail, acceptable infrastructure charges
Airport Business Park – industry, hotel, bulky goods etc	481	9,620	20%	1,924	Expansive gas industry, extensive resource sector investment in Toowoomba (major base for services and facilities), bypass interchanges built at no/low cost to land owners.
Quarry	127	3,810	0%	0	Longer term redevelopment at higher employment density when remainder of precinct is fully established (effective land bank)
Totals	1,797	21,782		5,569	

4.19 Wilsonton

4.19.1 Discussion

A modest growth dormitory area with high levels of local and regional employment. Key features include:

	2011	2031	Change
Population	13,280	14,848	11.8%
Workforce (EFT)	5,706	6,476	13.5%

4.19.2 Assumptions and Notes

Note	Item
1 -P	The majority of growth will occur in line with zoning and approvals.
2 -E	Employment growth in line with population growth with key employment occurring in and around the airport.
3 -E	Industrial Area in the vicinity of the current airport is estimated to host 2,890 EFT in 2011. Assumed to increase by 20% in the period to 2031 (to 3,237) as sites are occupied by more intensive uses and space consumptive/logistic uses relocate to CWEA. Airport is assumed to be on operation in 2031 in its current (or expanded) role.
4 -E	Footloose employment projected to increase in line with population profile.

5.0 School Enrolment

The following table provides estimates for school enrolments.

It is assumed that the University will have an on-site student population of 4,400 in 2013, increasing by 15% over the next 20 years.

Table 8 School Enrolment

Name	Type	Street	Suburb	Postcode	2013	Notes
Agnew School (Toowoomba)	Associated Facility	Gerrard Street	Toowoomba	4350		
Amaroo Environmental Education Centre	Outdoor and Environmental Education Centre	Kleinton School Road	Kleinton	4352	Unknown	Growth unknown
Back Plains State School	State School	Clifton-Pittsworth Highway	Back Plains	4361	19	Low Growth
Biddeston State School	State School	Cecil Plains Road	Biddeston	4401	59	Steady
Bowenville State School	State School	Irvingdale Road	Bowenville	4404	24	Declining
Brookstead State School	State School	Ware Street	Brookstead	4364	37	Steady
Bunker's Hill State School	State School	Bunkers Hill School Road	Westbrook	4350	215	Low Growth
Cambooya State School	State School	Harrow Street	Cambooya	4358	117	Declining
Cecil Plains State School	State School	Taylor Street	Cecil Plains	4407	63	Declining
Centenary Heights SHS - Flexi School Campus	Support Unit (Other)	Chalk Drive	Toowoomba	4350	Unknown	
Centenary Heights SHS - Special Education Program	Special Education Program	Cnr South and Ramsay Streets	Toowoomba	4350	Unknown	Confirm
Centenary Heights State High School	State High School	Ramsay Street	Toowoomba	4350	1354	Low Growth
Christian Outreach College (Toowoomba)	Non-State School	Hume Street	Toowoomba	4350	680	Growth unknown
Clifford Park Special School	Special School	Rob Street	Toowoomba	4350	100	Low Growth
Clifton State High School	State High School	East Street	Clifton	4361	273	Low Growth
Clifton State School	State School	Tooth Street	Clifton	4361	95	Declining
Concordia Lutheran College	Non-State School	Stephen Street	Toowoomba	4350	325	Two campuses
Concordia Lutheran College (Concordia Primary)	Associated Facility	Warwick Street	Toowoomba	4350	200	Growth unknown
Concordia Lutheran College (Martin Luther Primary)	Associated Facility	Hume Street	Toowoomba	4350	125	Growth unknown
Cooyar State School	State School	Gracey Street	Cooyar	4402	57	High Growth
Crow's Nest SS - Special Education Program	Special Education Program	Littleton Street	Crow's Nest	4355	Unknown	Confirm
Crow's Nest State School	State School	Littleton Street	Crow's Nest	4355	320	Steady
Darling Downs Christian School	Non-State School	McDougall Street	Toowoomba	4350	170	Growth unknown
Darling Heights SS - Special Education Program	Special Education Program	Wuth Street	Toowoomba	4350	Unknown	Confirm
Darling Heights SS Intensive English Centre	Special Education Unit (ESL)	Wuth Street	Toowoomba	4350	Unknown	Confirm
Darling Heights State School	State School	Wuth Street	Toowoomba	4350	633	Low Growth
Denise Kable Support Unit	Support Unit (Other)	Ramsay Street	Toowoomba	4350	Unknown	
Downlands Sacred Heart College (Toowoomba)	Non-State School	Ruthven Street	Toowoomba	4350	920	Growth unknown
Drayton State School	State School	Brisbane Street	Drayton	4350	299	Declining
Emu Creek State School	State School	New England Highway	Greenmount East	4359	16	Declining
Fairholme College (Toowoomba)	Non-State School	Wirra Wirra Street	Toowoomba	4350	1048	Growth unknown
Fairview Heights SS - Special Education Program	Special Education Program	Mc Dougall Street	Toowoomba	4350	Unknown	Confirm
Fairview Heights State School	State School	McDougall Street	Toowoomba	4350	588	Moderate Growth
Gabbinbar SS - Special Education Program	Special Education Program	Stenner Street	Middle Ridge Toowoomba	4350	Unknown	Confirm
Gabbinbar State School	State School	Stenner Street	Toowoomba	4350	399	Steady

Name	Type	Street	Suburb	Postcode	2013	Notes
Geham State School	State School	New England Highway	Geham	4352	111	Declining
Glenvale Christian School (Toowoomba)	Non-State School	Boundary Street	Glenvale	4350	80	Growth unknown
Glenvale SS - Special Education Program	Special Education Program	Glenvale Road	Toowoomba	4350	Unknown	Confirm
Glenvale State School	State School	Glenvale Road	Toowoomba	4350	703	Low Growth
Goombungee State School	State School	Mocatta Street	Goombungee	4354	110	Declining
Gowrie State School	State School	Old Homebush Road	Gowrie Junction	4352	183	Declining
Greenmount State School	State School	Haldon Street	Greenmount	4359	29	Declining
Haden State School	State School	Haden-Crow's Nest Road	Haden	4353	18	High Growth
Harlaxton State School	State School	Ruthven Street	Toowoomba	4350	100	Declining
Harristown SHS - Special Education Program	Special Education Program	South Street	Toowoomba	4350	Unknown	Confirm
Harristown SHS Intensive English Centre	Special Education Unit (ESL)	South Street	Toowoomba	4350	Unknown	Confirm
Harristown SS - Special Education Program	Special Education Program	South Street	Toowoomba	4350	Unknown	Confirm
Harristown State High School	State High School	South Street	Toowoomba	4350	1470	Declining
Harristown State School	State School	South Street	Toowoomba	4350	326	Declining
Highfields SS - Special Education Program	Special Education Program	New England Highway	Highfields	4352	Unknown	Confirm
Highfields State School	State School	New England Highway	Highfields	4352	887	Low Growth
Holy Name Primary School (Toowoomba)	Non-State School	Bridge Street	Toowoomba	4350	160	Growth unknown
Jondaryan State School	State School	Scott Road	Jondaryan	4403	32	Declining
Kingsthorpe State School	State School	Goombungee Road	Kingsthorpe	4400	179	Steady
Kulpi State School	State School	Oakey Road	Peranga	4352	8	Declining
Maridahdi Early Childhood Community School	Non-State School	Bowtell Street	Toowoomba	4350	60	Growth unknown
Mary MacKillop Catholic School	Non-State School	Highfields Road	Highfields	4352	440	Growth unknown
Mater Dei Primary School (Toowoomba)	Non-State School	Curzon Street	Toowoomba	4350	200 Est	Estimate
Meringandan State School	State School	Shirley Road	Meringandan	4352	231	Moderate Growth
Middle Ridge SS - Special Education Program	Special Education Program	Spring Street	Middle Ridge Toowoomba	4350	Unknown	Confirm
Middle Ridge State School	State School	Spring Street	Middle Ridge Toowoomba	4350	817	Low Growth
Millmerran State School	State School	Simmons Street	Millmerran	4357	286	Declining
Mount Tyson State School	State School	Main Street	Mount Tyson	4356	57	Steady
Newtown State School	State School	Albert Street	Toowoomba	4350	381	Moderate Growth
Nobby State School	State School	Davenport Street	Nobby	4360	40	High Growth
Oakey SHS - Special Education Program	Special Education Program	Campbell Street	Oakey	4401	Unknown	Confirm
Oakey SS - Special Education Program	Special Education Program	Campbell Street	Oakey	4401	Unknown	Confirm
Oakey State High School	State High School	Campbell Street	Oakey	4401	419	Declining
Oakey State School	State School	Campbell Street	Oakey	4401	377	Declining
Our Lady of Lourdes Primary School (Toowoomba)	Non-State School	Ascot Street	Toowoomba	4350	Unknown	Growth unknown
Pilton State School	State School	Pilton Valley Road	Clifton	4361	22	Declining
Pittsworth SHS - Special Education Program	Special Education Program	Factory Street	Pittsworth	4356	Unknown	Confirm
Pittsworth State High School	State High School	Factory Street	Pittsworth	4356	475	Steady
Pittsworth State School	State School	Hume Street	Pittsworth	4356	339	Declining
Quinalow Prep-10 State School	State School	Progress Street	Quinalow	4403	60	Declining
Ramsay State School	State School	Ramsay School Road	Ramsay Cambooya	4358	36	High Growth
Rangeville SS - Special Education Program	Special Education Program	High Street	Toowoomba	4350	Unknown	Confirm

Name	Type	Street	Suburb	Postcode	2013	Notes
Rangeville State School	State School	High Street	Toowoomba	4350	885	Steady
Rockville State School	State School	Holberton Street	Toowoomba	4350	161	Moderate Growth
Ryeford State School	State School	Clifton-Leyburn Road	Ryeford	4361	8	Declining
Sacred Heart Primary School (Toowoomba)	Non-State School	Tor Street	Toowoomba	4350	250	Growth unknown
Southbrook Central State School	State School	School Road	Southbrook	4363	59	Steady
St Anthony's School (Toowoomba)	Non-State School	Memory Street	Toowoomba	4350	200	Growth unknown
St Francis De Sales School (Clifton)	Non-State School	Meara Place	Clifton	4361	105	Growth unknown
St Joseph's College (Toowoomba)	Non-State School	James Street	Toowoomba	4350	695	Growth unknown
St Joseph's School (Millmerran)	Non-State School	Walpole Street	Millmerran	4357	89	Growth unknown
St Mary's College	Non-State School	Margaret Street	Toowoomba	4350	740	Growth unknown
St Monica's School (Oakey)	Non-State School	Lorimer Street	Oakey	4401	208	Growth unknown
St Saviour's College (Toowoomba)	Non-State School	Neil Street	Toowoomba	4350	350	Growth unknown
St Saviour's Primary School (Toowoomba)	Non-State School	Lawrence Street	Toowoomba	4350	440	Growth unknown
St Stephen's School (Pittsworth)	Non-State School	Murray Street	Pittsworth	4356	142	Growth unknown
St Thomas More's Primary School (Toowoomba)	Non-State School	South Street	Toowoomba	4350	405	Growth unknown
St Ursula's College (Toowoomba)	Non-State School	Taylor Street	Toowoomba	4350	761	Growth unknown
The Glennie School	Non-State School	Herries Street	Toowoomba	4350	1100	Growth unknown
Toowoomba Anglican College and Preparatory School	Non-State School	Campbell Street	Toowoomba	4350	428	Growth unknown
Toowoomba Christian College	Non-State School	New England Highway	Highfields	4352	560	Growth unknown
Toowoomba Early Childhood Development Program	Special Education Program	Bowtell Street	Toowoomba	4350	Unknown	Confirm
Toowoomba East SS - Special Education Program	Special Education Program	Cnr Arthur and Mary Streets	Toowoomba	4350	Unknown	Confirm
Toowoomba East State School	State School	Cnr Arthur and Mary Streets	Toowoomba	4350	862	Steady
Toowoomba Grammar School	Non-State School	Margaret Street	East Toowoomba	4350	1137	Growth unknown
Toowoomba North SS - Special Education Program	Special Education Program	Taylor Street	Toowoomba	4350	Unknown	Confirm
Toowoomba North State School	State School	Cnr Mort and Taylor Streets	Toowoomba	4350	171	Low Growth
Toowoomba Positive Learning Centre	Positive Learning Centre	Ramsay Street	Toowoomba	4350	Unknown	Growth unknown
Toowoomba SHS - Special Education Program	Special Education Program	North Street	Toowoomba	4350	Unknown	Confirm
Toowoomba State High School	State High School	Stuart Street	Toowoomba	4350	1542	Declining
Toowoomba State High School - Wilsonton Campus	Campus	North Street	Toowoomba	4350	Unknown	Growth unknown
Toowoomba West Special School	Special School	Gladstone Street	Toowoomba	4350	71	Low Growth
Vale View State School	State School	Drayton Connection Road	Vale View	4352	84	High Growth
Wellcamp State School	State School	Drayton-Wellcamp Road	Wellcamp	4350	64	High Growth
Wilsonton Agricultural Environmental Education Centre	Outdoor and Environmental Education Centre	North Street	Wilsonton Toowoomba	4350	Unknown	Growth unknown
Wilsonton SS - Special Education Program	Special Education Program	Bridge Street	Toowoomba	4350	Unknown	Confirm
Wilsonton State School	State School	Bridge Street	Toowoomba	4350	416	Declining
Wyreema State School	State School	High Street	Wyreema	4352	40	Moderate Growth
Yarraman State School	State School	John Street	Yarraman	4614	203	Moderate Growth
Youth and Community Learning Centre	Non-State School	Ruthven Street	Toowoomba	4350	Unknown	Growth unknown

6.0 Glossary

6.1 General Terms

Term	Description
SFD	Single Family Dwelling
Unit	Attached Dwelling (duplex, townhouse, apartment, flat etc)
Pop	Population

6.2 Employment Category

TRC Classification	Notes	Included ABS categories
Retail	Shop and shopfront employment that occurs in retail and retail centre locations. Includes retail employees and other employment categories that work from retail locations including food services, health (doctors, dentist etc that work from retail shopfronts), wholesale trade (some), transport (some), finance (some).	<ul style="list-style-type: none"> Wholesale trade - some Retail trade - all Accommodation and food services - some Financial and insurance services - some Health care and social assistance - some
Industry	All occupation groupings that work from an industrial location.	<ul style="list-style-type: none"> Manufacturing Electricity gas water and waste services Wholesale trade Transport postal and warehousing Sample of other groups is admin, finance etc
Other	All other groups and individuals.	All others not included above.

Appendix – Base Data

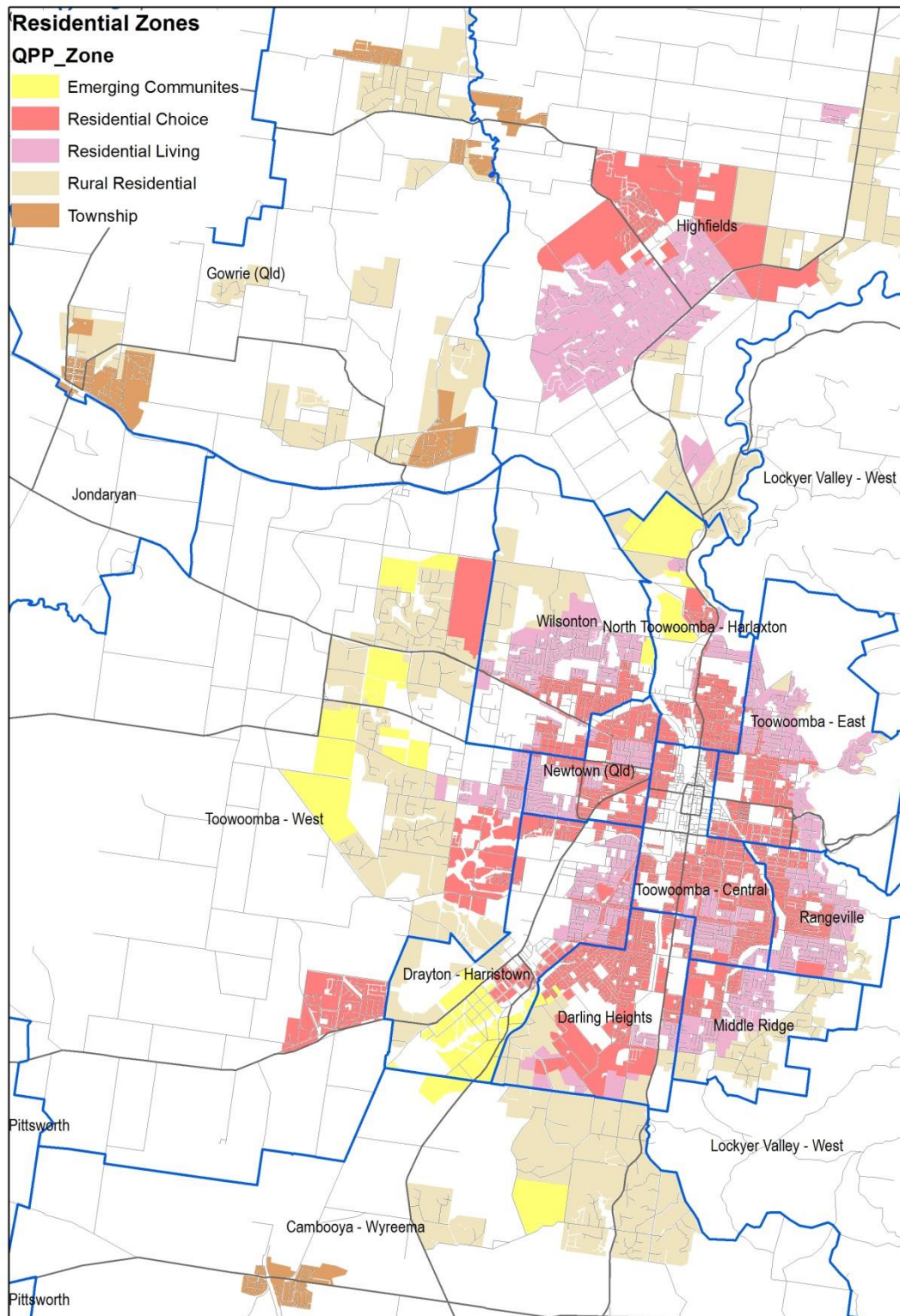


Figure 4 Urban and Residential Zoned Land, Toowoomba and environs

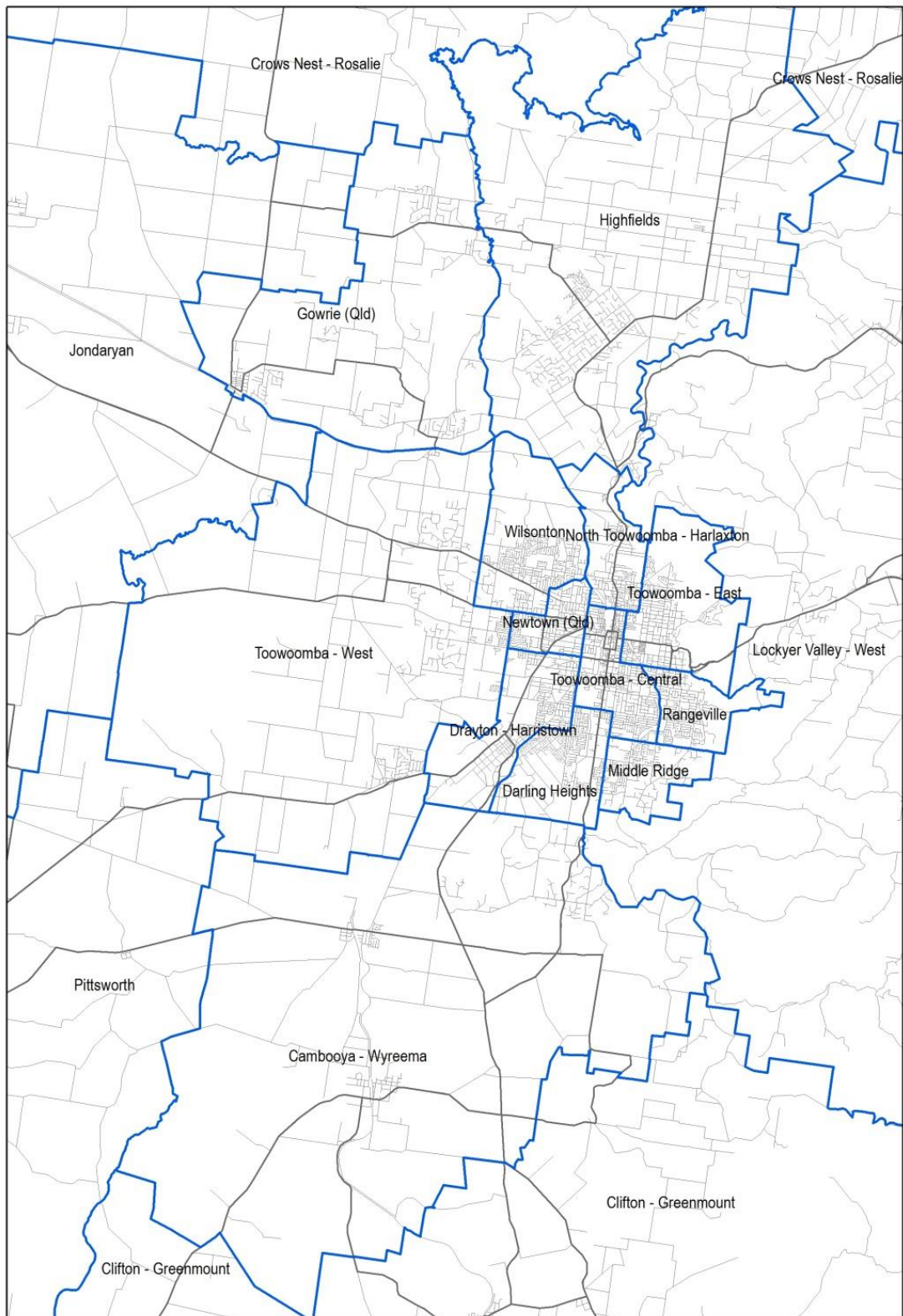


Figure 5 Toowoomba SA2 Boundaries

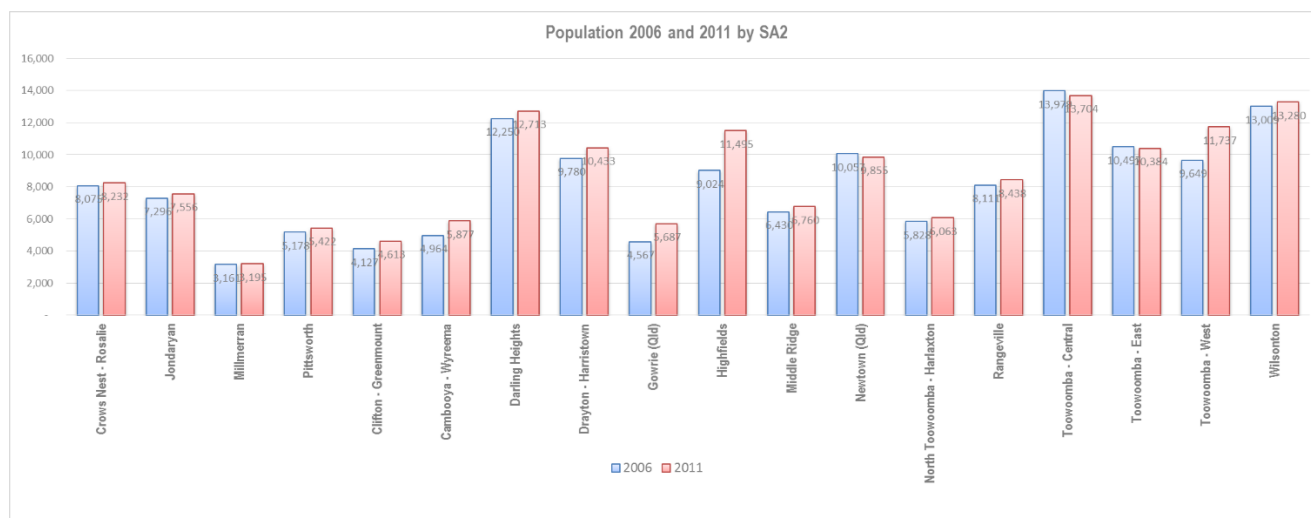


Figure 6 Population Growth 2006 to 2011

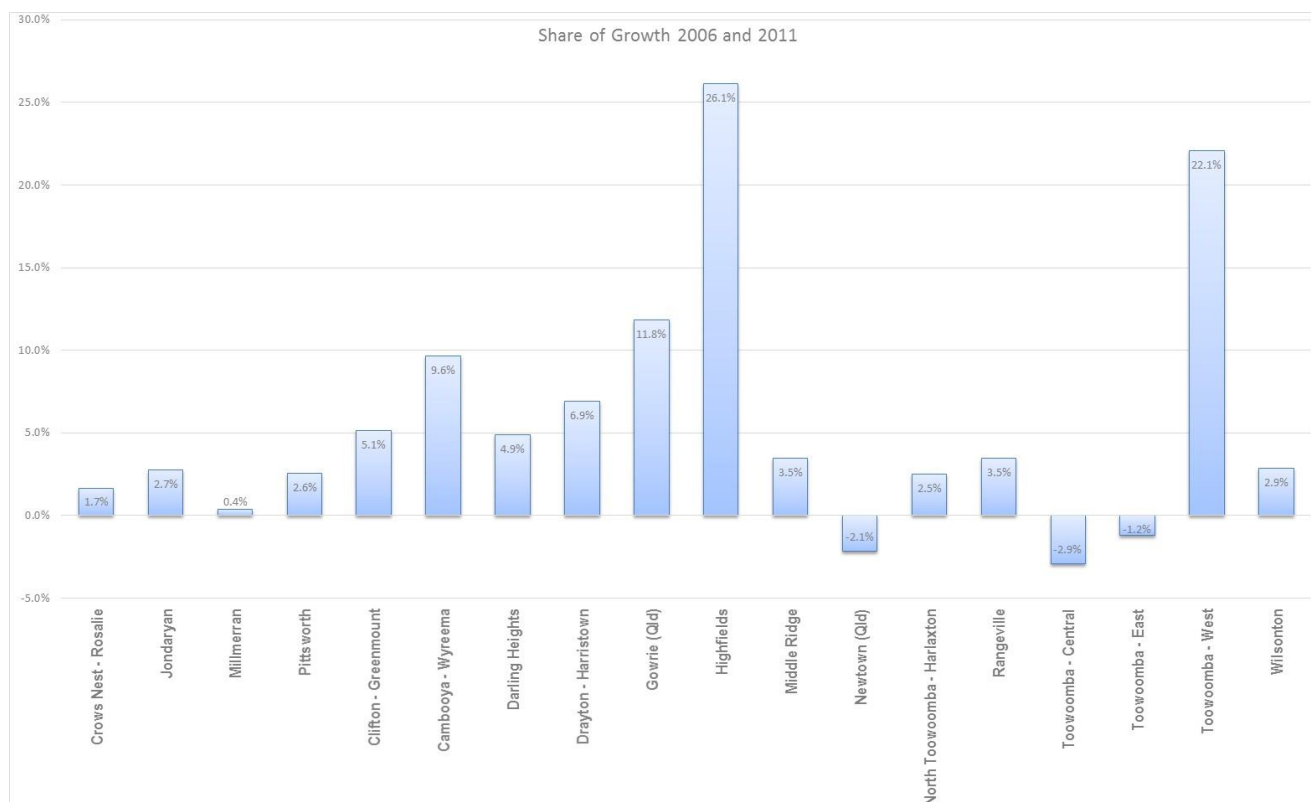


Figure 7 Percentage of growth 2006 to 2011

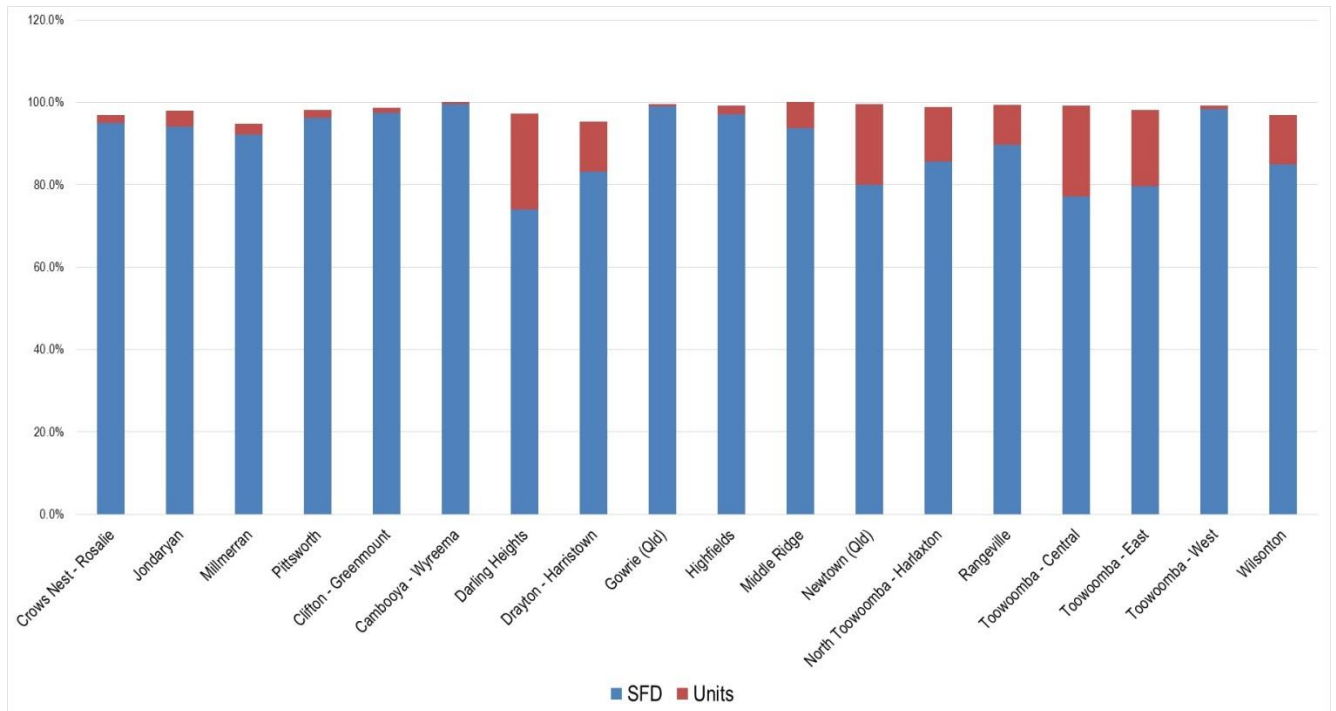


Figure 8 Dwelling Type by SA2 - 2011