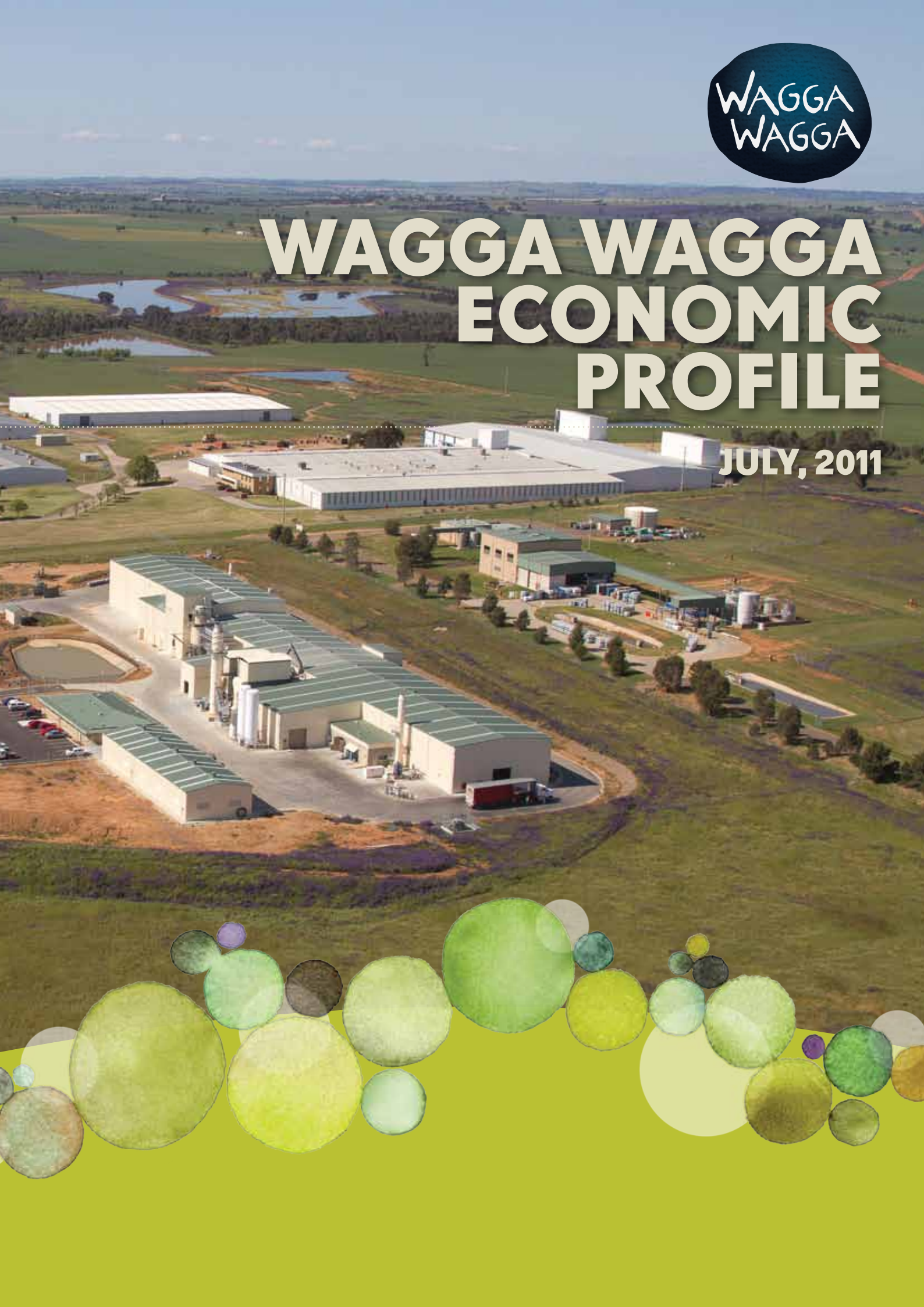




# WAGGA WAGGA ECONOMIC PROFILE

JULY, 2011



## Document Control

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## Executive Summary

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The City of Wagga Wagga is part of the Murrumbidgee Region in the heartland of the New South Wales Riverina. Wagga Wagga is the administration centre for the wider region and provides a range of community services. It enjoys first class transport connections and is located at the intersection of the Sturt and Olympic Highways on the Sydney and Melbourne trade route.

Wagga Wagga is also one of the seven recognised EvoCities in regional New South Wales. These are Cities which as defined as clean and green, vibrant, dynamic, innovative, professional, accessible and globally linked regional destinations that provide a certain quality of life and livability that continues to attract visitors and residents alike.

The Wagga Wagga Economic Profile 2011 (this report) provides an update of all key statistics and information that was last presented in the 2008 Economic Profile Report.

Key findings of the report include:

### **Population**

- Wagga Wagga is one of Australia's largest and fastest growing inland cities.
- Wagga Wagga has experienced strong historical growth over the past ten years and is expected to continue to draw significant numbers of people to the region to live and work in the future.
- Wagga Wagga has a relatively young population due to higher proportions of school aged children.
- Wagga Wagga is expected to age at a slightly faster rate than the State, highlighting that the demand for health and aged care services may increase over the next 25 years.

### **Economy**

- The Wagga Wagga economy has experienced strong economic growth of 5.0% p.a. over the past four years – above the economic growth of the Murrumbidgee and in line with New South Wales GSP growth trends.
- Leading sectors include public administration & safety, manufacturing and health care & social assistance, representing over a third of the Wagga Wagga regional economy and highlighting Wagga Wagga's role as both a population and business service centre.
- Wagga Wagga has experienced steady labour force and employment growth over the past five years, resulting in a below average unemployment rate of 5.2% in 2010.
- The population service based sectors of health care & social assistance, retail trade and accommodation & food services are Wagga Wagga's key employing sectors.
- Wagga Wagga has lower average weekly incomes across most industries when compared to New South Wales averages.

### **Investment**

- Residential building activity in Wagga Wagga has steadily increased over the past three years, following a slump in 2007, which was reflective of wider national trends.
- Average values per approval have also steadily climbed over the same period, however still remain relatively affordable when compared to the State averages.
- Median property prices and average weekly rents remain well below New South Wales averages, highlighting the affordability of the housing in the region.
- Wagga Wagga's non-Residential building investment has slowed over the 2010-2011 year following a year of peak investment in 2009.

- This slowing in investment is likely to be short lived as Wagga Wagga continues to attract major investment due to its offering of strategic geographic location, industrial infrastructure and workforce.

### **Livability & Quality of Life**

- Wagga Wagga offers a number of key attractions and experiences for residents and visitors, including a beautiful natural environment located on the Murrumbidgee River, a range of festivals and cultural events, world class art galleries and museums and a variety of parks and gardens.
- Wagga Wagga is a key services centre that provides the surrounding Murrumbidgee region with access to key health, education and community services.
- Wagga Wagga offers a well weighted balance between the businesses and industries of a large city, with all the quiet charm that is to be expected of a regional city.
- Attraction of residents and businesses seeking a lifestyle change is expected to continue in Wagga Wagga due to its offering of a quiet lifestyle, diversity of employment opportunities and affordability of property/ housing.

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# 1. Regional Overview

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Wagga Wagga is one of fourteen Local Government Areas (LGA's) located within the Murrumbidgee Statistical Division (SD). Wagga Wagga has a land area of 4,824 hectares - 7.1% of the Murrumbidgee Region's total land area, and sits on the banks of the Murrumbidgee River – the life force of the region. The Murrumbidgee Region is widely recognised for its diversity of flora, fauna and birdlife and is one of Australia's largest and richest horticultural, sheep and beef production areas.

Other key attributes of the City of Wagga Wagga are:

### ***Wagga Wagga is a Well Connected Regional City...***

Wagga Wagga is strategically located between Sydney and Melbourne, approximately 452km southwest of Sydney and 456km northwest of Melbourne. The City is highly accessible through its linkages with the Sturt and Hume Highways, which intersect 30 minutes from Wagga Wagga. Wagga Wagga is also accessible via the Sydney-Melbourne Railway line which acts as an important asset for business and industry in the region. Wagga Wagga is serviced by daily air passenger services provided through the Wagga Regional Airport.

### ***Wagga Wagga is positioned as the population and business services hub for the broader Murrumbidgee Region...***

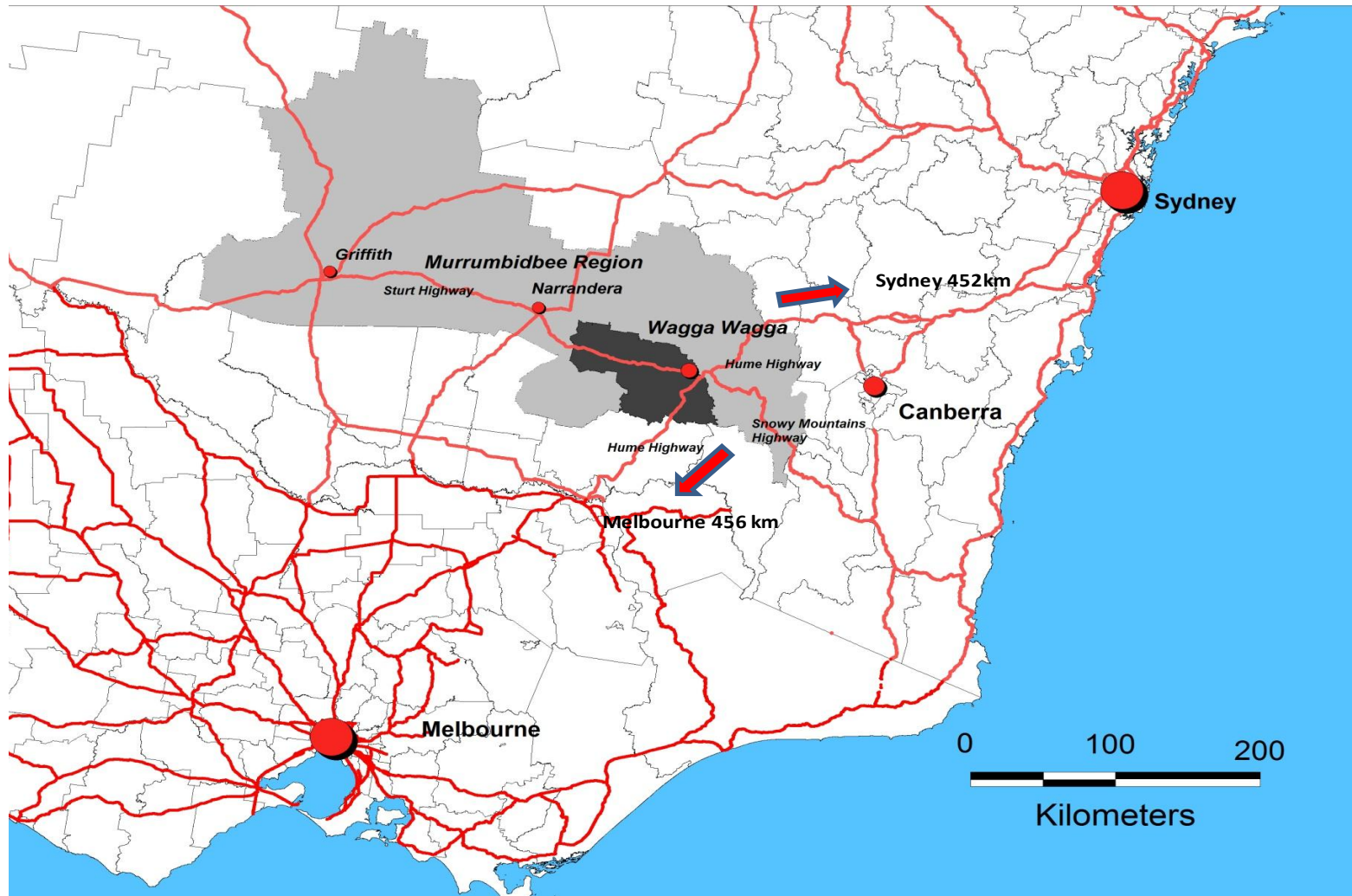
Wagga Wagga is situated at the heartland of the Murrumbidgee and acts as the population and business services centre in regional New South Wales that goes well beyond the physical boundaries of the Murrumbidgee Region.

In 2010, Wagga Wagga was home to 40% of the Murrumbidgee Region's population (63,500 persons) (ABS, 2011) and acts as a major population services hub for an additional 136,000 persons from the Murrumbidgee and broader catchment.

### ***Wagga has a strong sense of community & is culturally diverse, offering a range of experiences for visitors and residents...***

Wagga Wagga caters for a range of diverse lifestyles and provides a balance between country living and the ultimate arts and community experience. Abundant high quality community infrastructure, picturesque rivers and valleys, festivals and cultural events enhance and support the ambience of the region. Wagga Wagga is also known for its parks and gardens, world class art galleries and museums (including the National Art Glass Collection) and the Murrumbidgee River.

Figure 1.1: Wagga Wagga LGA, Regional New South Wales



Source: ABS (2007)



## 2. Population & Key Demographics

Wagga Wagga is one of Australia’s largest inland cities and is currently growing at a faster rate than the State average. The vast majority of residents live in Wagga Wagga’s urban centre with the balance living on farms or in the villages of Collingullie, Currawarna, Galore, Uranquinty, Mangoplah, Humula, Tarcutta, Ladysmith and Oura.

This Section contains the:

- **Historical and projected population** growth trends; and
- **Age distribution** of Wagga Wagga’s population.

### 2.1 Historical & Projected Population

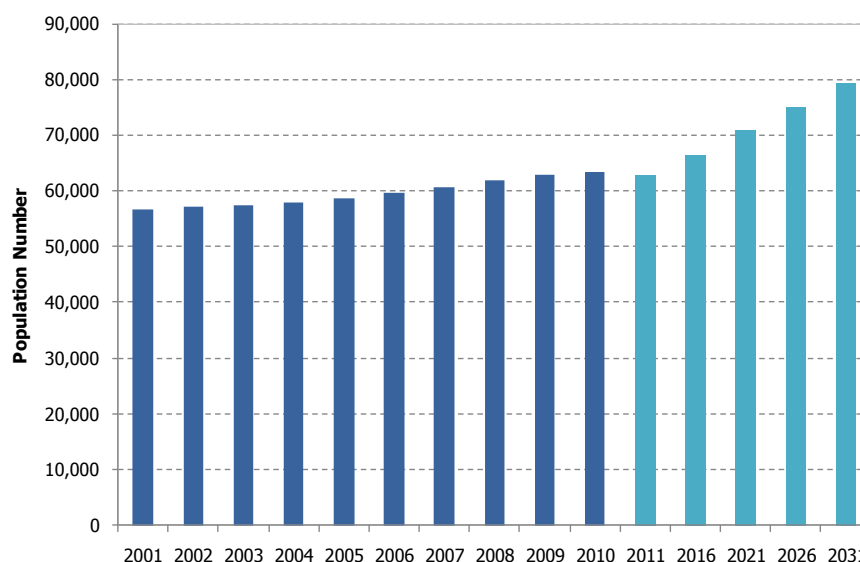
**Wagga Wagga has experienced strong historical growth over the past ten years and is expected to continue to draw significant numbers of people to the region to live and work in the future...**

Since 2001, Wagga Wagga has experienced above average population growth of 1.3% per annum to 63,500 persons in the year ended June 2010. This is equivalent to an average of 753 new residents each year. This growth is well above the average growth levels experienced by the broader Murrumbidgee Region (0.5% p.a.) and regional NSW (0.9% p.a.).

It is Wagga Wagga’s attractiveness, liveability and overall quality of life which has contributed significantly to this strong population growth, and is likely to be a key factor in drawing new residents to live and work in this vibrant regional City over years to come.

Wagga Wagga’s historical population trends are also testimony to the strength of local industry, which has been able to support population growth with sufficient employment opportunities and jobs growth over the past 10 years.

**Figure 2.1: Wagga Wagga’s Historical & Projected Population, 2001-2031**



Note: id Forecasting estimates that the ABS Historical 2010 year is a slight overestimate of actual population and thus shows a slight decline in population between 2010 and 2011.

Source: ABS (2011a), NSW Department of Planning (2008), ID (2011)

Looking ahead, id forecasting (2011) estimates that the population of Wagga Wagga will increase by an average of 1.1% p.a. to 79,378 people by 2031. This is an increase of 25.1% (or 15,878 people) over the 20 year period.

In contrast, the broader Murrumbidgee (excluding Wagga Wagga) is expected to experience declines in population of 0.2% p.a. (or increase by 0.4% p.a. when Wagga’s strong population growth is included in the count). Wagga Wagga is likely to absorb some

of the broader region's population declines with a large proportion of these Murrumbidgee residents relocating to the Wagga Wagga service centre.

**Table 2.1: Historical and Projected Population, 2006-2031**

|                        | 2006      | 2010      | 2021      | 2031      | Av Ann<br>Change 2010-<br>2031 |
|------------------------|-----------|-----------|-----------|-----------|--------------------------------|
| <b>Wagga Wagga</b>     |           |           |           |           |                                |
| Population (No.)       | 59,646    | 63,500    | 70,773    | 79,378    | 15,878                         |
| Annual Growth Rate (%) | 1.7%      | 1.1%      | 1.3%      | 1.1%      | 1.1%                           |
| <b>Murrumbidgee</b>    |           |           |           |           |                                |
| Population (No.)       | 154,092   | 159,624   | 165,073   | 172,378   | 12,754                         |
| Annual Growth Rate (%) | 0.9%      | 0.8%      | 0.3%      | 0.2%      | 0.4%                           |
| <b>New South Wales</b> |           |           |           |           |                                |
| Population (No.)       | 6,816,087 | 7,232,589 | 7,990,164 | 8,755,690 | 1,523,101                      |
| Annual Growth Rate (%) | 0.9%      | 1.5%      | 0.9%      | 0.9%      | 0.9%                           |

Source: ABS (2011), NSW Department of Planning (2008), ID (2011)

## 2.2 Age Distribution

***Wagga Wagga has a relatively young population due to higher proportions of school aged children. However, Wagga Wagga is expected to age at a slightly faster rate than the State, highlighting that the demand for health and aged services may increase over the next 25 years...***

Wagga Wagga has a younger age demographic with a higher proportion of persons aged zero to 24 years and a lower proportion of persons aged over 55 years than the State average. Between 2001 and 2006, the average age increased by 1.4 years to 35.3, faster than the New South Wales average of 1.0 years to 37.5 over the same period.

**Table 2.2: Age Distribution, 2001 & 2006**

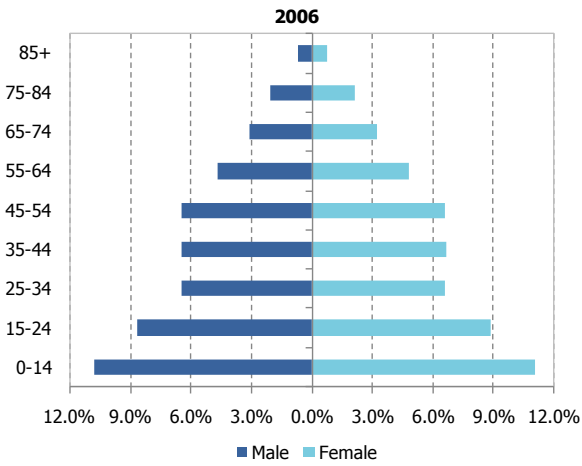
| Age                | Wagga Wagga LGA |             | New South Wales |             |
|--------------------|-----------------|-------------|-----------------|-------------|
|                    | 2001            | 2006        | 2001            | 2006        |
| 0 to 14 years      | 22.6%           | 22.1%       | 20.8%           | 19.8%       |
| 15 to 24 years     | 18.0%           | 17.2%       | 13.4%           | 13.3%       |
| 25 to 34 years     | 13.6%           | 12.6%       | 14.5%           | 13.6%       |
| 35 to 44 years     | 14.0%           | 13.1%       | 15.3%           | 14.6%       |
| 45 to 54 years     | 12.7%           | 13.2%       | 13.5%           | 13.8%       |
| 55 to 64 years     | 8.0%            | 9.6%        | 9.4%            | 11.0%       |
| Over 65 years      | 11.1%           | 12.3%       | 13.1%           | 13.8%       |
| <b>Average Age</b> | <b>33.9</b>     | <b>35.3</b> | <b>36.5</b>     | <b>37.5</b> |

Source: ABS (2007)

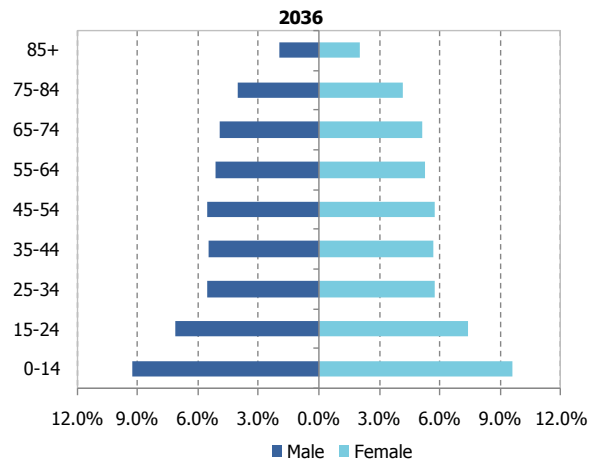
The population's age and sex distribution for 2006 can be observed in Figure 2.2. Figure 2.3 represents the projected age and sex distributions for 2036. Figure 2.3 highlights that over the 30 year period, it is projected that the concentration of older residents in Wagga Wagga (65+ years of age) is likely to increase to 40.6% of the population, compared to 27.1% in 2006.

The incidence of an ageing population is likely to create increased pressure on health and aged care services within Wagga Wagga.

**Figure 2.2: Age & Sex Distribution, Wagga Wagga, 2006**



**Figure 2.3: Age & Sex Distribution, Wagga Wagga, 2036**



Source: NSW Department of Planning (2008)



### 3. Size & Structure of the Economy

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The size and structure of the Wagga Wagga economy is characterised by:

- **Gross regional product** and industry contribution to industry value-add;
- **Employee contribution to economic activity** (industry value-add);
- **Industry Output Generation** (turnover); and
- The **numbers and types of businesses** that are located in the Wagga Wagga economy.

Key definitions of terminology used to describe the economic indicators presented in this section are outlined in the table below.

#### Definitions of Key Terms Used

- **Output (also referred to as turnover in text):** Output measures the gross sales throughout the whole economy by summing all the individual transactions resulting, directly and indirectly, to the economic stimulus. The output is also useful in providing an indication of the degree of structural dependence between sectors of the economy.
- **Gross Value Added (GVA):** Gross value added (GVA) measures the net activity of each stage of production for key industry sectors and excludes taxes and subsidies and ownership of dwellings. GVA is not the same as output as it also does not include wages and incomes.
- **Gross Regional Product (GRP):** Gross Regional Product (GRP) measures only the net activity at each stage of production and is defined as the addition of consumption, investment and government expenditure, plus exports of goods and services, minus imports of goods and services for a region. GRP is presented as GVA plus taxes and subsidies.

## 3.1 Gross Regional Product & Economic Structure

### 3.1.1 Size of the Economy

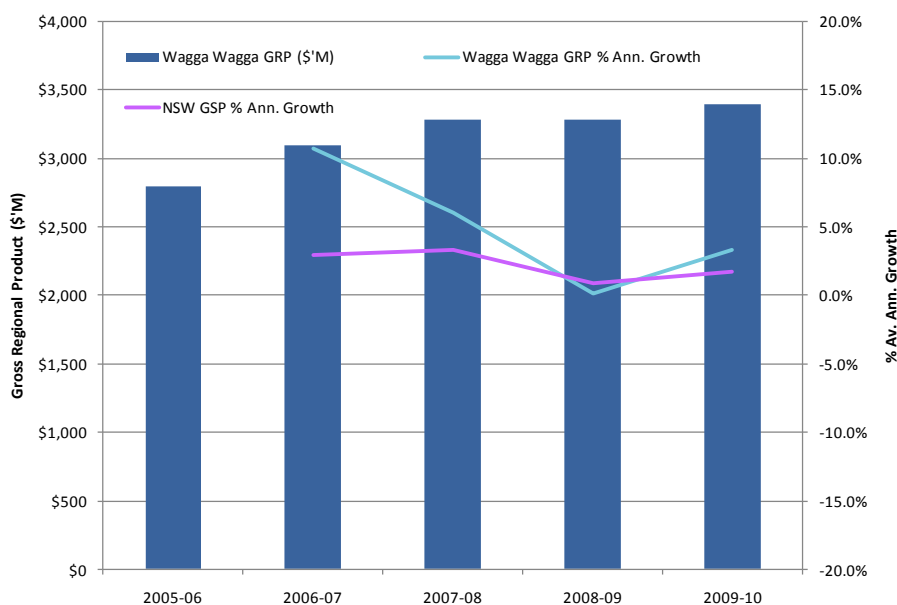
**Wagga Wagga's economy has experienced strong economic growth of 5.0% p.a. over the past four years – above the economic growth of the New South Wales Gross State Product... Wagga Wagga accounts for 51.0% of the Murrumbidgee Region's total GRP...**

Wagga Wagga produced an estimated \$3.4 billion in Gross Regional Product (GRP) in 2009-10, making up 51.0% of the total GRP produced by the Murrumbidgee SD.

Over the past four years the Wagga Wagga economy has experienced growth of 5.0% per annum - above the State growth trends (2.2% p.a.) over the period.

Over the past year, Wagga Wagga's GRP has experienced growth of 3.3%. This was driven by growth in the professional, scientific & technical services, wholesale trade and manufacturing sectors over the period.

**Figure 3.1: Wagga Wagga's GRP Growth, 2005-06 to 2009-10**



Source: AECgroup (2011)

Over the past four years, Wagga Wagga's key growth sectors (by value) have been:

- Finance & insurance services (growth of 10.7% p.a., increase of \$17.6 million p.a.);
- Professional, scientific & technical services (growth of 16.0% per annum, increase of \$14.2 million p.a.);
- Health care & social assistance (growth of 6.4% p.a., increase of \$10.2 million p.a.);
- Transport, postal & warehousing (growth of 9.3% p.a., increase of \$9.9 million p.a.); and
- Manufacturing (growth of 4.6% p.a., increase of \$9.7 million p.a.).

Public administration & safety, education & training and retail trade were also significant growth sectors. In terms of Wagga Wagga's economic growth in relation to the broader region, fourteen out of the nineteen industries are outperforming the rest of the Murrumbidgee LGA catchment, highlighting Wagga Wagga's key role as a major regional inland city and business hub within regional New South Wales. These increases have been driven by expansion of Wagga Wagga's industrial sector and its demand for associated business services over the past four years. Population growth also continues to drive expansion of existing population services industry such as health care and retail trade.

**Table 3.1: GRP and Four Year GRP Growth (%), 2005-06 to 2009-10**

|   | Wagga Wagga       |                                    | Murrumbidgee      |                                    | New South Wales   |                                    |
|---|-------------------|------------------------------------|-------------------|------------------------------------|-------------------|------------------------------------|
|   | 2009-10 GRP (\$M) | Annual % Change 2005-06 to 2009-10 | 2009-10 GRP (\$M) | Annual % Change 2005-06 to 2009-10 | 2009-10 GSP (\$M) | Annual % Change 2005-06 to 2009-10 |
| Agriculture, forestry and fishing               | \$66              | -4.7%                              | \$494             | -3.5%                              | \$5,120           | -0.2%                              |
| Mining  | \$18              | 18.7%                              | \$62              | 9.5%                               | \$14,659          | 2.0%                               |
| Manufacturing                                   | \$309             | 4.6%                               | \$778             | 0.9%                               | \$35,592          | 0.2%                               |
| Electricity, gas, water and waste services      | \$74              | 5.1%                               | \$425             | 17.3%                              | \$8,000           | -0.2%                              |
| Construction                                    | \$173             | 4.5%                               | \$366             | -1.4%                              | \$24,102          | 3.4%                               |
| Wholesale trade                                 | \$143             | 7.3%                               | \$224             | 0.6%                               | \$18,508          | 2.1%                               |
| Retail trade                                    | \$192             | 6.1%                               | \$308             | -1.0%                              | \$16,580          | 2.5%                               |
| Accommodation and food services                 | \$108             | 4.9%                               | \$271             | 7.8%                               | \$9,958           | 0.5%                               |
| Transport, postal and warehousing               | \$170             | 9.3%                               | \$364             | 2.2%                               | \$19,663          | 1.4%                               |
| Information media and telecommunications        | \$102             | 11.9%                              | \$143             | 12.8%                              | \$16,115          | 3.4%                               |
| Financial and insurance services                | \$267             | 10.7%                              | \$151             | -15.1%                             | \$60,758          | 5.1%                               |
| Rental, hiring and real estate services         | \$86              | 2.2%                               | \$102             | -7.1%                              | \$11,225          | -0.6%                              |
| Professional, scientific and technical services | \$158             | 16.0%                              | \$179             | -0.1%                              | \$28,879          | 3.2%                               |
| Administrative and support services             | \$84              | 1.0%                               | \$192             | 6.7%                               | \$10,444          | -0.3%                              |
| Public administration and safety                | \$344             | 4.0%                               | \$418             | -1.9%                              | \$17,979          | 3.1%                               |
| Education and training                          | \$225             | 6.2%                               | \$334             | -3.8%                              | \$16,482          | 1.5%                               |
| Health care and social assistance               | \$240             | 6.4%                               | \$407             | 2.6%                               | \$21,611          | 3.7%                               |
| Arts and recreation services                    | \$19              | 4.7%                               | \$41              | 8.0%                               | \$3,490           | 3.1%                               |
| Other services                                  | \$73              | 2.5%                               | \$107             | -3.9%                              | \$6,679           | 0.2%                               |
| <b>Total Industry Value Added</b>               | <b>\$2,853</b>    | <b>4.6%</b>                        | <b>\$5,365</b>    | <b>0.5%</b>                        | <b>\$345,843</b>  | <b>2.4%</b>                        |
| <i>Ownership of dwellings</i>                   | <i>\$206</i>      | <i>13.8%</i>                       | <i>\$625</i>      | <i>0.9%</i>                        | <i>\$32,002</i>   | <i>2.1%</i>                        |
| <b>Gross Value Added</b>                        | <b>\$3,059</b>    | <b>5.1%</b>                        | <b>\$5,991</b>    | <b>0.5%</b>                        | <b>\$377,845</b>  | <b>2.4%</b>                        |
| <i>Taxes less Subsidies</i>                     | <i>\$332</i>      | <i>3.6%</i>                        | <i>\$654</i>      | <i>-0.8%</i>                       | <i>\$29,073</i>   | <i>0.4%</i>                        |
| <b>Gross Regional Product</b>                   | <b>\$3,391</b>    | <b>5.0%</b>                        | <b>\$6,644</b>    | <b>0.4%</b>                        | <b>\$406,918</b>  | <b>2.2%</b>                        |

Source: AECgroup (2011)



### 3.1.2 Structure of the Economy

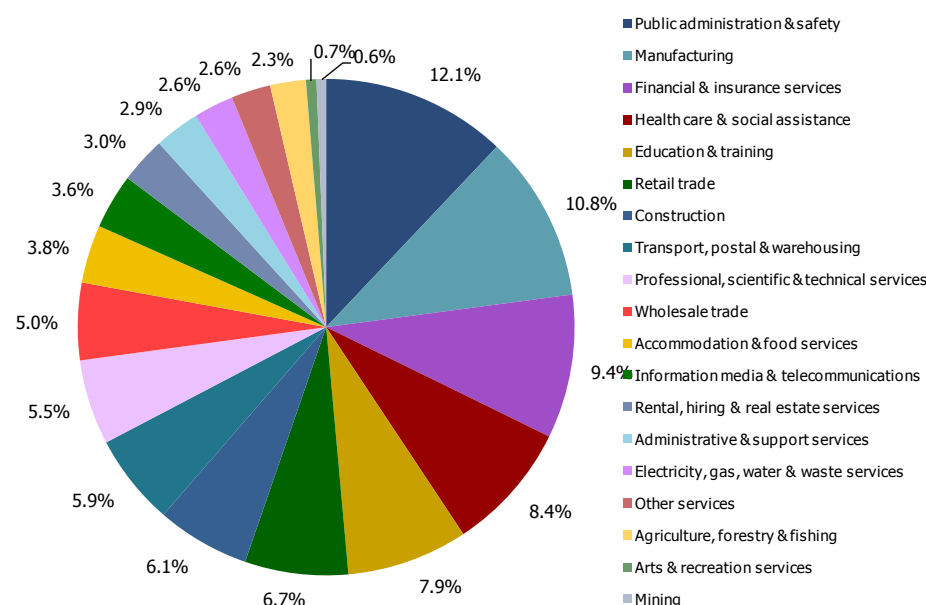
**Wagga Wagga's leading sectors are public administration & safety, manufacturing and health care & social assistance, representing over a third of the Wagga Wagga regional economy...**

In 2009-10, Wagga Wagga's leading sector, public administration and safety, generated an estimated \$343.9 million – over 12% of Wagga's industry contribution to industry value-add. The strength of this sector is primarily due to the military presence in Wagga in the form of the Army Recruit Training Centre at Kapooka army training facility and the Royal Australian Air Force base located at Forest Hill.

Other leading sectors of the Wagga Wagga economy include manufacturing, finance & insurance services and health care & social assistance.

In 2009-10, the manufacturing sector was Wagga Wagga's second largest sector (\$309.4 million) – representing 10.8% of industry value-add. Food product manufacturing and machinery and equipment manufacturing activities are the major contributors to the economic activity of this sector.

**Figure 3.2: Wagga Wagga Contribution to Industry Value Add (%), 2009-10**



Source: AECgroup (2011)

**Table 3.2: Wagga Wagga's Industry Contribution to GRP, 2009-10**

|   | Wagga Wagga | Murumbidgee | New South Wales |
|---|-------------|-------------|-----------------|
| Public administration & safety                | 12.1%       | 7.8%        | 5.2%            |
| Manufacturing                                 | 10.8%       | 14.5%       | 10.3%           |
| Financial & insurance services                | 9.4%        | 2.8%        | 17.6%           |
| Health care & social assistance               | 8.4%        | 7.6%        | 6.2%            |
| Education & training                          | 7.9%        | 6.2%        | 4.8%            |
| Retail trade                                  | 6.7%        | 5.7%        | 4.8%            |
| Construction                                  | 6.1%        | 6.8%        | 7.0%            |
| Transport, postal & warehousing               | 5.9%        | 6.8%        | 5.7%            |
| Professional, scientific & technical services | 5.5%        | 3.3%        | 8.4%            |
| Wholesale trade                               | 5.0%        | 4.2%        | 5.4%            |
| Accommodation & food services                 | 3.8%        | 5.0%        | 2.9%            |

|  | Wagga Wagga   | Murrumbidgee  | New South Wales |
|--|---------------|---------------|-----------------|
| Information media & telecommunications   | 3.6%          | 2.7%          | 4.7%            |
| Rental, hiring & real estate services    | 3.0%          | 1.9%          | 3.2%            |
| Administrative & support services        | 2.9%          | 3.6%          | 3.0%            |
| Electricity, gas, water & waste services | 2.6%          | 7.9%          | 2.3%            |
| Other services                           | 2.6%          | 2.0%          | 1.9%            |
| Agriculture, forestry & fishing          | 2.3%          | 9.2%          | 1.5%            |
| Arts & recreation services               | 0.7%          | 0.8%          | 1.0%            |
| Mining                                   | 0.6%          | 1.2%          | 4.2%            |
| <b>Total</b>                             | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b>   |

Source: AECgroup (2011)

### 3.1.2.1 Location Quotient Analysis

#### **What are Location Quotients and Why are They Useful?**

In order to demonstrate the specialisation of the economy, location quotients have been calculated based on contribution to industry value add (refer to Table 3.2). The location quotients demonstrate the degree to which a local or regional economy is specialised by examining the contribution of industry value add (by industry sector) in the Wagga Wagga economy compared to a larger economy (New South Wales economy). Location quotients can be used to indicate the relative strengths or weaknesses of a local or regional economy (i.e. a natural competitive advantage or disadvantage).

For the analysis, Wagga Wagga LGA and Murrumbidgee SD were compared against contribution to industry value-add for New South Wales. A location quotient of "1" means that the economies being compared have an equal share of industry contribution to value-add (compared to New South Wales) for a specific industry sector, thus no potential advantage or disadvantage. A location quotient above "1" indicates a specialisation of economic activity, therefore an area of potential competitive advantage. If the location quotient is below "1", the area has a comparatively low level of economic activity or is under-represented compared to the New South Wales economic structure in this particular industry sector.

Figure 3.3 presents the location quotients for all industries at the 19-sector (sector) ANZSIC code level.

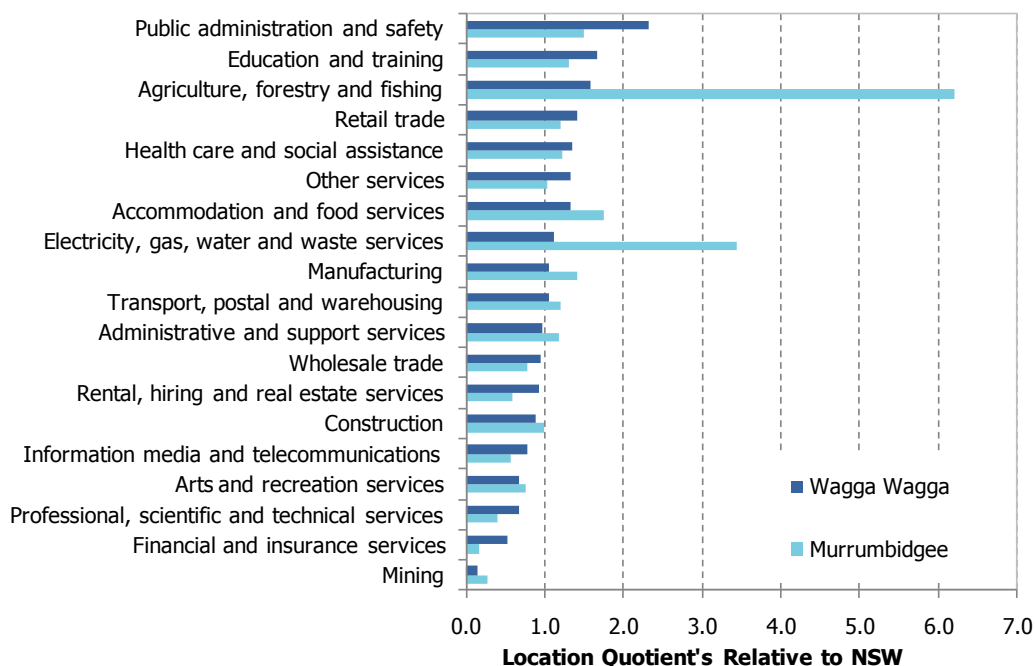
The Location Quotient Analysis of Wagga Wagga's contribution to industry value-add (compared to NSW, LQ = 1) indicates that Wagga's key strength sectors (compared to NSW) are mainly:

- Public administration & safety (including defence);
- Agriculture, forestry & fishing;
- Population services based industries (e.g. accommodation & food services, education & training, health care & social assistance, retail trade); and
- Utilities services and infrastructure (electricity, gas, water and waste water services).

Transport, postal & warehousing and manufacturing are also reasonably represented within Wagga Wagga LGA, however these are more in line with State trends (only slightly above a LQ of 1.0).

Comparison with the wider regional economic structure highlights significantly higher capabilities in agriculture, forestry & fishing and electricity, gas, water and waste water services in the broader Murrumbidgee Region and less capability in providing population and business services. This once again highlights the importance of Wagga Wagga as the primary service centre for population and business services within the broader Murrumbidgee Region.

**Figure 3.3: Location Quotients – Contribution to GRP versus New South Wales**



Note: All New South Wales Industry Location Quotients = 1.  
Source: AECgroup (2011)

### 3.1.3 Employee Contribution to Industry Value Add

When considering employment and the importance it has on the overall economy, it is very important to consider the value of employment (based on industry) in addition to the overall total employment figures. Table 3.3 demonstrates contribution to industry value-add per employee and represents the value that one job in the various industries generates for the local economy.

Based upon this assessment, it is easy to see the high value-adding jobs. Table 3.2 shows that Wagga Wagga has considerable employment across retail trade, education and health care and social assistance services. These jobs represent less value to the overall economy when compared to the industrial sector (manufacturing, wholesale trade and transport and storage) and the business services (information, media and telecommunications and finance & insurance).

**Table 3.3: Wagga Wagga's Industry Value Added per Employee, 2009-10**

| Industry  | \$/Employee |
|---|-------------|
| Mining  | \$506,961   |
| Financial and insurance services                | \$317,209   |
| Information media and telecommunications        | \$172,414   |
| Rental, hiring and real estate services         | \$166,754   |
| Electricity, gas, water and waste services      | \$163,237   |
| Construction                                    | \$126,248   |
| Manufacturing                                   | \$118,116   |
| Wholesale trade                                 | \$117,023   |
| Transport, postal and warehousing               | \$107,174   |
| Public administration and safety                | \$103,215   |
| Administrative and support services             | \$89,606    |
| Professional, scientific and technical services | \$78,893    |
| Education and training                          | \$69,837    |
| Arts and recreation services                    | \$66,007    |
| Agriculture, forestry and fishing               | \$59,346    |
| Health care and social assistance               | \$58,420    |

| Industry                        | \$/Employee |
|---------------------------------|-------------|
| Accommodation and food services | \$48,540    |
| Retail trade                    | \$48,106    |
| Other services                  | \$47,276    |

Source: AECgroup (2011)

### 3.2 Industry Output Generation (Turnover)

**Manufacturing, wholesale trade and retail trade are Wagga Wagga's leading sectors by turnover (as opposed to industry value add), contributing 40% to total output in the Wagga Wagga economy...**

In 2009-10<sup>1</sup>, Wagga Wagga recorded a total industry turnover of approximately \$8.1 billion. The three industries with the highest output were manufacturing (\$1.3 billion), retail trade (\$1.2 billion) and wholesale trade (\$966 million). Across the 19 industry sectors (refer to Table 3.4), these three largest sectors accounted for 40% of total output of the Wagga Wagga economy.

**Table 3.4: Wagga Wagga's Industry Output Generation, 2009-10**

| Industry  | Industry Turnover (\$M) | Proportion (%) |
|---|-------------------------|----------------|
| Manufacturing                                   | \$1,258                 | 15.6%          |
| Retail trade                                    | \$1,155                 | 14.3%          |
| Wholesale trade                                 | \$966                   | 12.0%          |
| Public administration and safety                | \$621                   | 7.7%           |
| Construction                                    | \$552                   | 6.8%           |
| Financial and insurance services                | \$513                   | 6.4%           |
| Transport, postal and warehousing               | \$445                   | 5.5%           |
| Health care and social assistance               | \$399                   | 4.9%           |
| Education and training                          | \$360                   | 4.5%           |
| Professional, scientific and technical services | \$352                   | 4.4%           |
| Accommodation and food services                 | \$272                   | 3.4%           |
| Agriculture, forestry and fishing               | \$226                   | 2.8%           |
| Electricity, gas, water and waste services      | \$213                   | 2.6%           |
| Information media and telecommunications        | \$198                   | 2.4%           |
| Other services                                  | \$175                   | 2.2%           |
| Rental, hiring and real estate services         | \$152                   | 1.9%           |
| Administrative and support services             | \$136                   | 1.7%           |
| Arts and recreation services                    | \$59                    | 0.7%           |
| Mining  | \$31                    | 0.4%           |
| <b>Total</b>                                    | <b>\$8,082</b>          | <b>100.0%</b>  |

Source: AECgroup (2011)

<sup>1</sup> Note gross industry output (turnover) has been calculated from indicative GVA estimates and converted to industry gross output values using the Australian national accounts (total factor income Cat. No. 522.0) and the Australian industry performance indicators (sales & service income: Cat. No. 81550). These are indicative calculations only and may differ from the actual industry activity for the period.

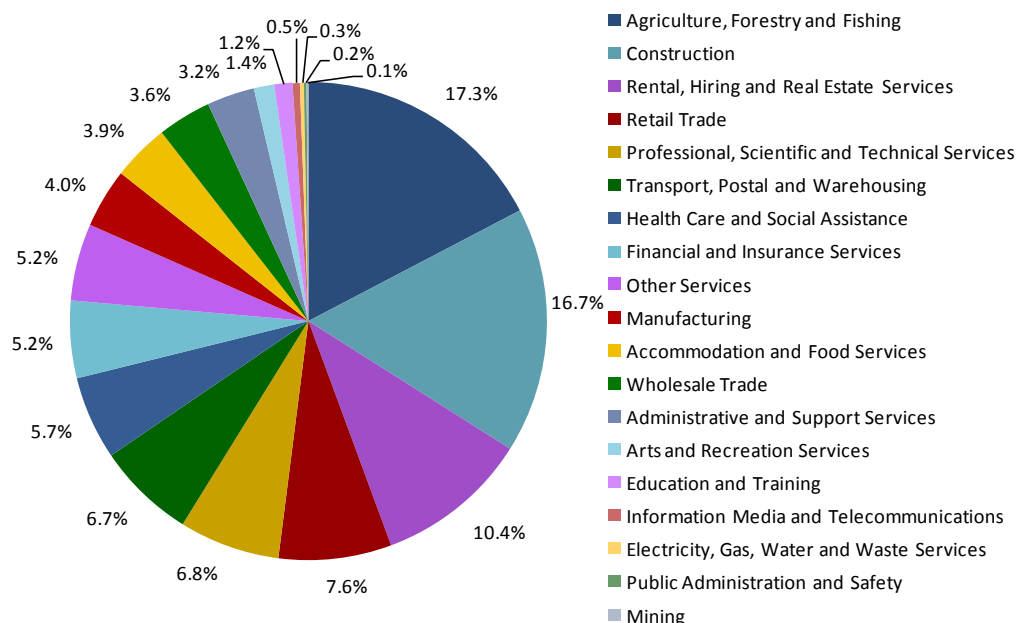
### 3.3 Business Counts

**The largest proportions of businesses located in Wagga Wagga are agriculture and construction based businesses. Many of these are small businesses...**

In 2009, business count by industry indicates there were 4,937 businesses located within Wagga Wagga, with the majority of these being from the sectors of:

- Agriculture, forestry & fishing (845 businesses, 17.3% of total business);
- Construction (813 businesses, 16.7% of total business); and
- Rental, hiring & real estate services (507 businesses, 10.4% of total business).

**Figure 3.4: Wagga Wagga's Businesses by Industry, 2009**



Note: Business counts for 2009 use the 2006 ANZSIC code classification.  
Source: ABS (2010a)

Non-employed (i.e. sole traders, and family businesses) and small to medium businesses make up the majority of businesses, with non-employed businesses comprising over 50 per cent of all businesses in the region.

#### **HOW HAS THE WAGGA BUSINESS STRUCTURE CHANGED?**

In 2007, there were 4,905 businesses in the Wagga Wagga LGA. Comparison with 2009 business counts of 4,937 businesses highlights that while there has been some growth in the number of businesses (32 businesses) the relative number of businesses has remained stable over the 2007 to 2009 period.

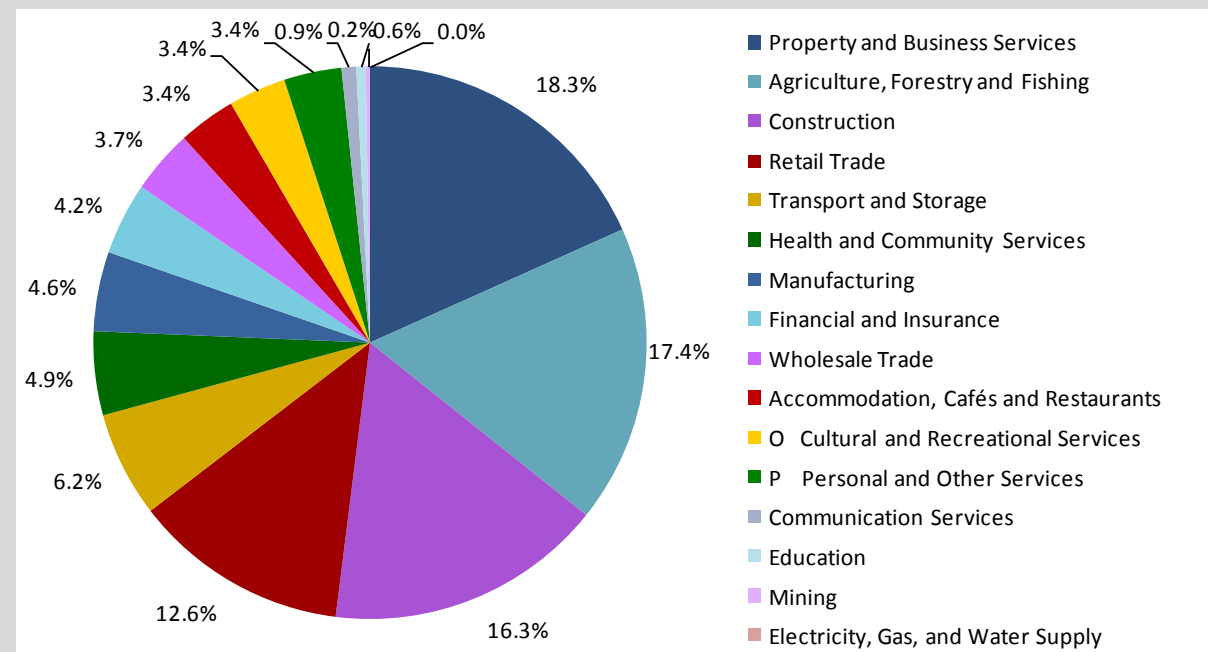
2007 business counts by industry (1993 ANZSIC codes) indicate the highest proportion of businesses were in the sectors of:

- Property & business services (18.3%);
- Agriculture, forestry & fishing (17.4%);
- Construction (16.3%); and
- Retail trade (12.6%).

Given that there has since been a change in the industry ANZSIC classification between reporting years, there are some discrepancies between the proportions presented for the 2007 and 2009 years. However, for the top industries of agriculture, construction and property and business services there appears to have been very little change in the overall structure or relationship of

these industries despite classification changes. Further analysis of the retail sector highlights that the proportion of retail trade businesses have in fact declined substantially in the Wagga Wagga economy over the two year period from 12.6% to 7.6% in 2009. While some of this may be accounted for within the change in classification, a large proportion of this is due to actual declines in retail trade business numbers over the period to 372 retail businesses in 2009.

**Figure 3.5: Wagga Wagga's Businesses by Industry, 2007**



Note: Business counts for 2007 use the 1993 ANZSIC code classification.  
Source: ABS (2010a)

## 4. Labour Market

Wagga Wagga has a healthy and growing labour market that offers many job opportunities and career development paths. The regional labour force is supported by existing linkages of business and industry with education & training assets located at Wagga Wagga's Charles Sturt University, Defence Training facilities, TAFE NSW Riverina Institute and the Regional Express' Australian Airline Pilot Academy.

This Section details key indicators of Wagga Wagga's labour market including:

- **Labour force and employment;**
- **Employment by industry;**
- **Employment by occupation;** and
- **Average industry wages & salaries.**

### 4.1 Labour Force & Employment

***Wagga Wagga has experienced steady labour force and employment growth over the past five years, resulting in an unemployment rate of 5.2% in the September Quarter 2010...***

Wagga Wagga's labour force number has increased steadily over the past four years by 5.8% to 33,767 persons in the September Quarter of 2010. This growth is equivalent to over an additional 600 persons being added to the Wagga Wagga labour force each year. Similarly, the number of employed has also grown by 6.4% over the past four years – above the rate of labour force growth. This highlights the growth in employment opportunities in the region over the period.

**Table 4.1: Wagga Wagga's Labour Force & Employment, September 2010**

|                       | Sept Q 2010 (No.) | % 1-Year Change | % 4-Year Change |
|-----------------------|-------------------|-----------------|-----------------|
| Labour Force (No.)    | 33,767            | 0.6%            | 5.8%            |
| Employment (No.)      | 32,016            | -0.3%           | 6.4%            |
| Unemployment (No.)    | 1,751             | 19.9%           | -4.1%           |
| Unemployment Rate (%) | 5.2%              | 0.8%            | -0.6%           |

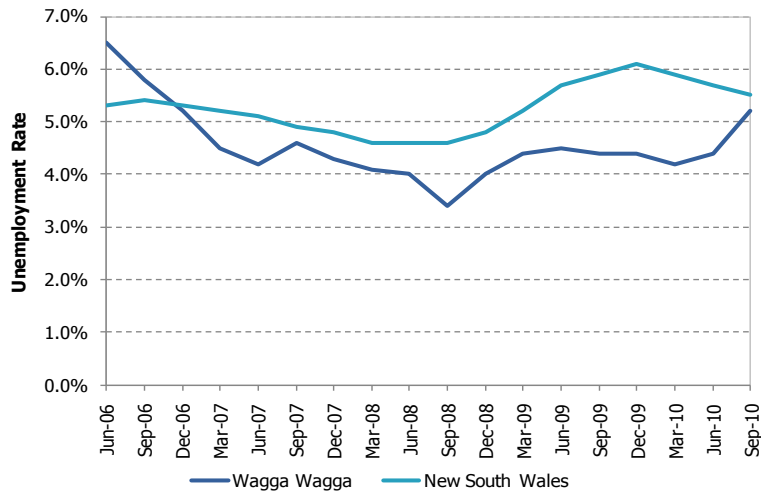
Note: (a) Percentage point change.  
Source: DWEER (2010)

Figure 4.1 shows that over the past four years, Wagga Wagga's unemployment rate has fluctuated between a high of 6.4% and a low of 3.2%. In the September Quarter of 2010, unemployment rates were estimated at 5.2% - below the unemployment rates for the Murrumbidgee Region (5.4%) and New South Wales (5.5%).

Throughout the global economic downturn, Wagga Wagga maintained relatively low unemployment rates and continued labour force growth.

The resilience of employment in the Wagga Wagga economy at this time was due to the low reliance of the region upon the finance and insurance sector (unlike metro-NSW areas) and the diversity of Wagga Wagga's economy.

**Figure 4.1: Wagga Wagga & New South Wales Unemployment Rate (%), 2006-2010**



Source: DEEWR (2010)



## EMPLOYMENT PERFORMANCE & JOB VACANCIES

The Skills Info Regional Employment Vacancy Index represents the job vacancies for regional areas of Australia and New South Wales. Wagga Wagga is located in broader Riverina and Murray Region presented by the Index in the figure below.

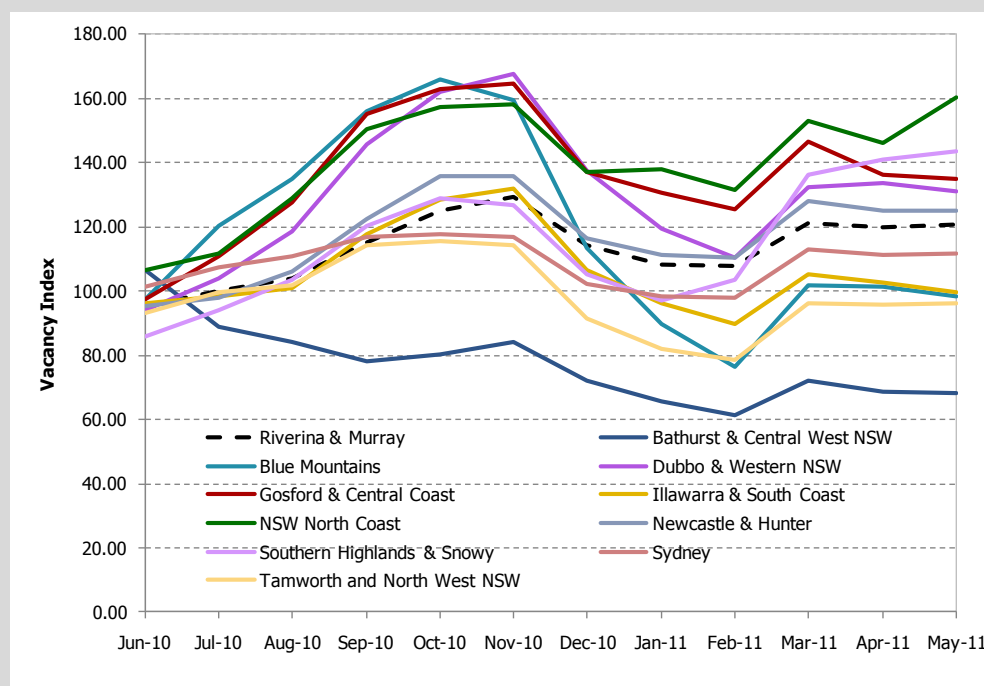
Over the year to May 2011, the Riverina and Murray region reported an increase in skilled job vacancies of 29.9 percentage points, this was behind the increases experienced by:

- Southern Highlands and Snowy (57.5 percentage points);
- NSW North Coast (54.0 percentage points);
- Gosford and Central Coast (37.4 percentage points); and
- Dubbo and Western NSW (37.2 percentage points).

Overall, NSW reported seven of its eleven regions experiencing increases in job vacancies over the year to May 2011.

In May 2011, the Riverina and Murray region recorded a Job Vacancy Index of 120.9, ahead of Bathurst and Central West (68.3), Blue Mountains (98.5), Illawarra and South Coast (99.7), Sydney (111.5) and Tamworth and North West NSW (96.0).

**Figure 4.2: Job Vacancy Index, 2011**



Notes: The Regional Vacancy Index was developed in September 2010 and backcast to June 2010. The Regional Vacancy Index concords vacancies from the four major job boards to 38 best fit regions across the eight States and Territories. Data is presented as a three month moving average, as well as being indexed. The above graph shows the employment vacancy index for the 11 regions of New South Wales. Source: Skills Info Employment Index (2011)

As a largely non-resources based economy, Wagga Wagga is like many other similar areas in Australia which are currently experiencing increases in skilled vacancies due to loss of skilled employees to the high paying mining and resources sector. Increasing household pressures and financial constraints will continue to attract workers to the mining and resources sector, with the offer of job stability and higher wages compared to many other sectors in the economy.

Over the past year there has been a general growth in the vacancy index in non-resource based economies with the decline in vacancies in the Bathurst and Central West NSW area being a prime example of a resource based economy where there is a higher take-up rate for job vacancies (resulting in a low job vacancy index).

As the major service centre within the Riverina and Murray region, Wagga Wagga's labour force has continued to grow over the past couple of years as has its employment opportunities. Unlike

many other regional areas of New South Wales, Wagga Wagga has an economy that supports a diverse range of industry activities. Looking ahead, continued population and economic growth across a diverse range of industry and job types, in addition lifestyle characteristics and quality of life, will continue to be a key draw card for attracting and retaining skilled labour in Wagga Wagga. As such, Wagga Wagga has a competitive advantage over many other areas in regional NSW and is likely to continue to attract skilled labour despite widespread labour and skills shortages.

## 4.2 Employment by Industry

**Key sectors of employment in the Wagga Wagga economy are the population service based sectors of health care & social assistance, retail trade and accommodation & food services...**

In line with Wagga Wagga's role as a major service centre, healthcare & social assistance is the largest employing industry in the region accounting for 3,979 jobs in 2010 (or 13.8% of employment).

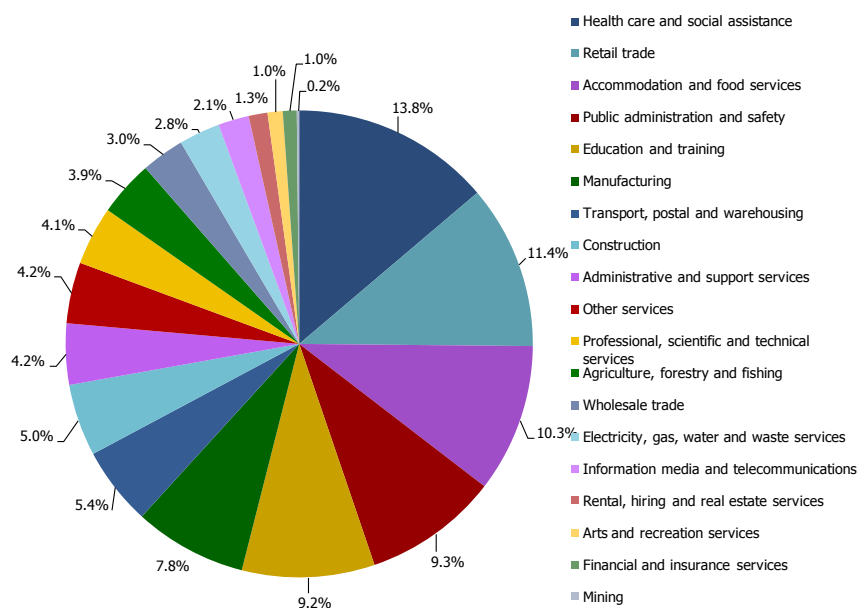
Service based jobs were among the other largest employing sectors, with retail trade employing 3,275 persons (11.4%) and accommodation and food services employing a total of 2,967 persons (10.3%). Public administration & safety and education & training are also key employers for Wagga Wagga.

**Table 4.2: Employment Estimates by Industry, 2009-10**

| Industry  | Wagga Wagga   | Murrumbidgee  | NSW              |
|---|---------------|---------------|------------------|
| Health care and social assistance               | 3,979         | 6,966         | 392,253          |
| Retail trade                                    | 3,275         | 6,400         | 341,733          |
| Accommodation and food services                 | 2,967         | 5,578         | 219,170          |
| Public administration and safety                | 2,694         | 4,047         | 180,970          |
| Education and training                          | 2,649         | 4,782         | 260,303          |
| Manufacturing                                   | 2,252         | 6,589         | 279,827          |
| Transport, postal and warehousing               | 1,567         | 3,395         | 185,674          |
| Construction                                    | 1,438         | 2,899         | 265,340          |
| Administrative and support services             | 1,221         | 2,145         | 117,846          |
| Other services                                  | 1,219         | 2,271         | 140,734          |
| Professional, scientific and technical services | 1,174         | 2,265         | 294,819          |
| Agriculture, forestry and fishing               | 1,112         | 8,318         | 103,052          |
| Wholesale trade                                 | 860           | 1,912         | 131,482          |
| Electricity, gas, water and waste services      | 819           | 2,607         | 50,023           |
| Information media and telecommunications        | 615           | 828           | 75,309           |
| Rental, hiring and real estate services         | 376           | 610           | 64,855           |
| Arts and recreation services                    | 302           | 626           | 49,590           |
| Financial and insurance services                | 277           | 476           | 152,390          |
| Mining  | 48            | 123           | 32,486           |
| <b>Total</b>                                    | <b>28,846</b> | <b>62,836</b> | <b>3,337,856</b> |

Source: ABS (2007), DEEWR (2010), AECgroup (2011)

**Figure 4.3: Wagga Wagga's % Industry Employment Contribution, 2009-10**



Source: ABS (2007), DEEWR (2010), AECgroup (2011)

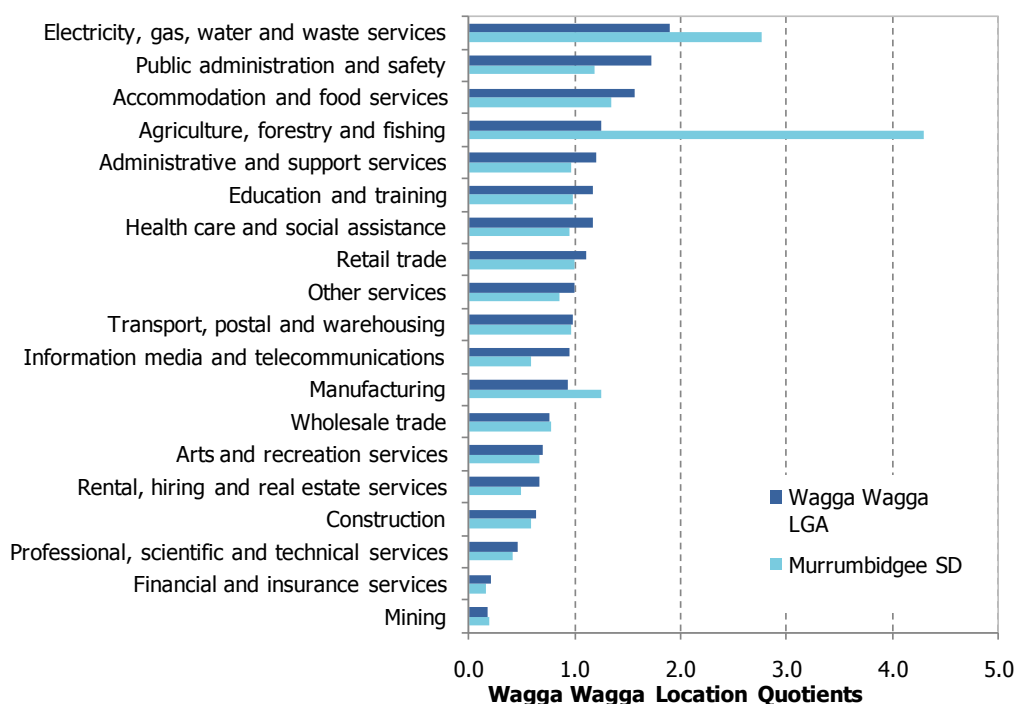
#### 4.2.1.2 Location Quotient Analysis

As for Industry Value-Add (refer to Section 3.1.2.1), employment by industry contribution has been assessed using location quotients to determine where Wagga Wagga has a relative strength or capability, compared to the New South Wales employment by industry contributions.

The Location Quotient Analysis of Wagga Wagga's employment by industry (compared to NSW, LQ = 1) indicates that Wagga's key strength sectors by employment (compared to NSW) are mainly:

- Utilities services and infrastructure (electricity, gas water and waste water services);
- Public administration & safety (including defence); and
- Agriculture, forestry & fishing; and
- Population services based industries (e.g. accommodation & food services, education & training, health care & social assistance, retail trade).

**Figure 4.4: Employment Location Quotients, 2009-10**



Note: All New South Wales Industry Location Quotients = 1.  
Source: ABS (2007), DEEWR (2010), AECgroup (2011)

### 4.3 Employment by Occupation

**Wagga Wagga has a higher proportion of professionals, technicians and trades workers and clerical and administrative workers and sales workers compared to the broader Murrumbidgee Region...**

Wagga Wagga’s key occupations of employment are:

- Professionals (18.5%);
- Technicians & trades workers (15.4%); and
- Clerical & administrative workers (14.3%).

Compared to the Murrumbidgee Region and New South Wales, Wagga Wagga has a higher proportion of technicians and trades workers, community & personal service workers, and sales workers. This highlights the position of Wagga Wagga as the regional service hub for the Murrumbidgee Region.

Professionals and clerical & administrative workers are also well represented in Wagga Wagga when compared to the Murrumbidgee Regional economy but not compared to the State.

**Table 4.3: Employment by Occupation, 2006**

| Occupation                             | Wagga Wagga | Murrumbidgee | New South Wales |
|--|-------------|--------------|-----------------|
| Managers                               | 12.5%       | 18.6%        | 13.9%           |
| Professionals                          | 18.5%       | 15.1%        | 21.6%           |
| Technicians and trades workers         | 15.4%       | 13.8%        | 13.9%           |
| Community and personal service workers | 11.1%       | 9.4%         | 8.7%            |
| Clerical and administrative workers    | 14.3%       | 12.6%        | 15.7%           |
| Sales workers                          | 11.7%       | 9.8%         | 9.9%            |
| Machinery operators and drivers        | 5.5%        | 6.6%         | 6.6%            |
| Labourers                              | 11.0%       | 14.1%        | 9.7%            |

Source: ABS (2007)

## 4.4 Industry Incomes

**Wagga Wagga has lower average weekly incomes across most industries when compared to New South Wales averages...**

Average individual incomes in Wagga Wagga in 2006 were lower than the New South Wales average in all but one sector. Administrative & support services recorded higher average incomes than the State (\$810 compared to \$750). The highest earning industries in Wagga Wagga are mining (\$940), electricity, gas water & waste services (\$870), administrative & support services (\$810) and financial & insurance services (\$761).

**Table 4.4: Individual Weekly Incomes by Industry of Employment, 2006**

| Industry                                      | Wagga Wagga | New South Wales | Difference |
|---|-------------|-----------------|------------|
| Mining  | \$940       | \$1,500         | -\$560     |
| Electricity, gas, water & waste services      | \$870       | \$1,191         | -\$320     |
| Administrative & support services             | \$810       | \$750           | \$60       |
| Financial & insurance services                | \$761       | \$1,229         | -\$468     |
| Transport, postal & warehousing               | \$756       | \$921           | -\$165     |
| Information media & telecommunications        | \$735       | \$1,113         | -\$379     |
| Professional, scientific & technical services | \$687       | \$1,155         | -\$468     |
| Rental, hiring & real estate services         | \$665       | \$930           | -\$265     |
| Public administration & safety                | \$656       | \$1,074         | -\$418     |
| Construction                                  | \$649       | \$880           | -\$231     |
| Wholesale trade                               | \$642       | \$947           | -\$304     |
| Manufacturing                                 | \$638       | \$900           | -\$262     |
| Health care & social assistance               | \$634       | \$826           | -\$191     |
| Agriculture, forestry & fishing               | \$555       | \$620           | -\$65      |
| Education & training                          | \$530       | \$955           | -\$425     |
| Arts & recreation services                    | \$449       | \$720           | -\$271     |
| Other services                                | \$417       | \$681           | -\$264     |
| Retail trade                                  | \$409       | \$558           | -\$149     |
| Accommodation & food services                 | \$408       | \$482           | -\$74      |

Notes: In some cases these results are from a small proportion of the total workforce  
Source: ABS (2007)

Analysis of Australian Tax Office (ATO) data indicates that the average wage in Wagga Wagga was \$38,963 for 2007-08 – above the average wages for the Murrumbidgee SD (\$36,806) but well below that of the State (\$46,513).

Between 2003-04 to 2007-08, the annual wage/salary for Wagga Wagga increased by a total of 17.1% or an average annual increase of 4.0%, slightly above the annual growth rate of the Murrumbidgee SD for the period (3.9% p.a.).

Comparison with the State average however, shows that wages & salaries growth has been below the growth experienced by New South Wales.

**Table 4.5: Average Wage/Salaries Growth, 2003-04 to 2007-08**

|                   | Wagga Wagga | Murrumbidgee | New South Wales |
|-------------------|-------------|--------------|-----------------|
| 2003-04           | \$33,266    | \$31,637     | \$39,648        |
| 2004-05           | \$34,884    | \$33,030     | \$41,433        |
| 2005-06           | \$35,752    | \$33,986     | \$43,032        |
| 2006-07           | \$37,135    | \$35,408     | \$44,850        |
| 2007-08           | \$38,963    | \$36,806     | \$46,513        |
| % Av. Ann. Growth | 4.0%        | 3.9%         | 4.1%            |

Source: ABS (2010b)

## 5. Key Industries

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Wagga Wagga is a diverse economy that provides a unique mix of business and population based service industries. Wagga Wagga's key industries are:

- Agriculture;
- Defence;
- Tourism;
- Retail; and
- Manufacturing.

These sectors are profiled in the Section below.

## 5.1 Agriculture

**Wagga Wagga is a key agriculture and agribusiness service centre that has been built on the strength of the grains, sheep and beef production in the broader Murrumbidgee Region...**

The Wagga Wagga agricultural sector is dominated by the historically strong sheep, beef cattle and grain farming industries, equivalent to over 75% of the total employment in the agriculture, forestry & fishing sector. This industry sector is supported by suitable growing conditions for sheep, beef and grains, an established supply chain and a number of key industry assets such as the Wagga Wagga Livestock Marketing Centre and the Cargill Beef Australia abattoir (located at Bomen). The Riverina Oil and Bio Energy (ROBE) manufacturing plant is also currently being constructed at Bomen. Upon completion this facility will crush 500 tonnes per day of oilseeds, producing 105,000 tonnes p.a. of vegetable protein meal and 65,000 tonnes p.a. of refined vegetable oil.

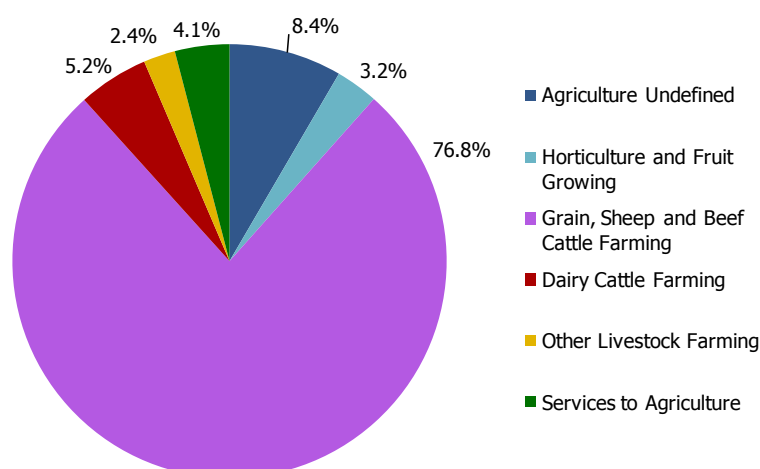
Wagga Wagga also acts as the agribusiness service centre for the broader Murrumbidgee Region. The service industries to agriculture include machinery sales and service outlets, rural supply retailers, transport companies, grain merchants, wool brokers and agricultural finance specialists. Agricultural businesses and employees are also supported by agricultural education and research programs through Charles Sturt University and the TAFE NSW Riverina Institute.

**Table 5.1: Agriculture Summary**

| Description                | Wagga Wagga | Murrumbidgee | New South Wales |
|----------------------------|-------------|--------------|-----------------|
| <b>Employed</b>            |             |              |                 |
| No. of Employees (2009-10) | 1,112       | 8,318        | 103,052         |
| % Industry Employment      | 3.9%        | 9.1%         | 3.1%            |
| <b>Industry Value Add</b>  |             |              |                 |
| Value Add (\$'M) (2009-10) | \$66        | \$494        | \$5,121         |
| % of GVA                   | 2.3%        | 9.2%         | 1.5%            |
| <b>Business</b>            |             |              |                 |
| No. of Businesses (2009)   | 845         | 5,575        | 59,616          |
| % of Businesses            | 17.3%       | 35.4%        | 8.9%            |

Source: ABS (2007a), ABS (2010a), DEEWR (2010), AECgroup

**Figure 5.1: % of Employment in the Wagga Wagga Agriculture Sector, 2006**



Note: The pie-chart represents % employment in the Agriculture sector.  
Source: ABS (2007)

## 5.2 Defence

**Wagga Wagga's RAAF and Army Recruit Training Centre (ARTC) are important assets to the overall training of Australian Defence Force (ADF) recruits across Australia...**

In 2009-10, it was estimated that the permanent defence employees numbered 1,362 in the region – 6.8% of total permanent defence employment in New South Wales.

As Wagga Wagga is home to the major defence force training academies – Kapooka Army Recruit Training Centre (ARTC) and the Wagga Wagga Royal Australian Air Force training base – more defence industry personnel come and go from Wagga Wagga when new training courses begin and conclude than is actually indicated by the total defence employment numbers.

**Table 5.2: Defence Summary**

| Defence Industry           | Employed Persons | % NSW |
|----------------------------|------------------|-------|
| <b>Employed in Defence</b> |                  |       |
| Wagga Wagga                | 1,362            | 6.8%  |
| Murrumbidgee               | 1,368            | 6.9%  |
| New South Wales            | 19,942           | 100%  |
| <b>Total Employed</b>      |                  |       |
| Wagga Wagga                | 28,246           | 0.8%  |
| Murrumbidgee               | 62,836           | 1.8%  |
| New South Wales            | 3,337,865        | 100%  |

Source: ABS (2007a), AECgroup

### **RAAF Base**

RAAF Base (Forest Hill) Wagga Wagga has been an integral part of the local Wagga community for almost 70 years. RAAF Wagga delivers technical and non-technical initial employment and post-graduate training to new air force recruits.

RAAF Wagga supports four major training units: No 1 Recruit Training Unit (1RTU), RAAF School of Technical Training (RAAFSTT), RAAF School of Administration and Logistics (RAAFSALT), and the School of Postgraduate Studies (SPS).

### **Army Recruit Training Centre (ARTC), Kapooka**

The Royal Australian Army Centre Kapooka is one of the Defence Forces primary training bases in use within Australia. The base has some of the most modern and well-equipped army training facilities on a national level. All Army Recruits and Reservists are trained through the Kapooka Army Base and as such the facility has a high level of throughput.

## 5.3 Tourism

***Wagga Wagga offers a number of key attractions and experiences to visitors of the Riverina Tourism Region, including a beautiful natural environment located on the Murrumbidgee River, a range of festivals and cultural events, world class art galleries and museums and a variety of parks and gardens...***

### 5.3.1 Attractions & Experiences

Wagga Wagga is located at the centre of the Riverina Tourism Region – also known as 'Australia's food bowl' due to the strength of its agriculture sector and its reputation for food and wine. Wagga Wagga is uniquely placed and provides a key base for visitors to the region offering all the necessary transport services, accommodation, restaurants and retail outlets necessary to support a vibrant tourism region.

Wagga Wagga also has a number of key attractions and events of its own, including:

- Two major festivals: the Food and Wine Festival (March) and the Jazz and Blues Festival (September);
- Several Wineries, offering premium boutique wines and restaurants all from their cellar doors;
- Several museums, including:
  - The Steam and Vintage Museum;
  - Wagga Wagga Rail Heritage Museum;
  - The National Art Glass Collection;
  - Australian Pen Museum; and
  - The Museum of the Riverina.
- The Livingstone National Park and State Conservation Area (located 30km's south of Wagga Wagga).

### 5.3.2 Types & Number of Visitors

In 2010, the total number of visitors to Wagga Wagga was estimated as:

- 598,000 domestic day visitors (46.3% of the total Riverina Tourism Region);
- 379,000 domestic overnight visitors (40.4% of the total Riverina Tourism Region);
- 12,000 international visitors (44.5% of the international visitors in the Riverina Tourism Region).

The primary purpose of a visit to Wagga Wagga was to visit family and friends (46% of visitors). This is likely to be influenced by the number of family and friends travelling to the region for graduation ceremonies each year – either at the Charles Sturt University or the Defence Force training bases.

Business and holiday/leisure were the equal second reason for visiting Wagga Wagga - representing 23% of visitors to Wagga Wagga.

**Table 5.3: Wagga Wagga Tourism Indicators**

| Description  | Period  | Indicator |
|--|---------|-----------|
| <b>No. Visitors</b>                                  |         |           |
| Domestic Day   | FY 2010 | 598,000   |
| Domestic Day - % of Riverina Region                  | FY 2010 | 46.3%     |
| Domestic Overnight                                   | FY 2010 | 379,000   |
| Domestic Overnight- % of Riverina Tourism Region     | FY 2010 | 40.4%     |
| International Visitors                               | FY 2010 | 12,000    |
| International Visitors- % of Riverina Tourism Region | FY 2010 | 44.5%     |
| <b>Visitor Nights</b>                                |         |           |
| No. Visitor Nights ('000)                            | FY 2009 | 1,064     |
| No. Domestic Visitor Nights ('000)                   | FY 2009 | 944       |
| No. International Visitor Nights ('000)              | FY 2009 | 120       |
| <b>Age Profile</b>                                   |         |           |
| 15-24 years  | 2009    | 16%       |
| 25-44 years  | 2009    | 34%       |
| 45-64 years  | 2009    | 35%       |
| 65 years and above                                   | 2009    | 15%       |
| <b>Purpose of Visit (general)</b>                    |         |           |
| Business   | 2009    | 23%       |
| Holiday/leisure                                      | 2009    | 23%       |
| Visiting family and Friends                          | 2009    | 46%       |
| Other  | 2009    | 8%        |
| <b>Purpose of Visit (specific)</b>                   |         |           |
| Visiting friends/relatives                           | 2009    | 52%       |
| Eat out/restaurants                                  | 2009    | 46%       |
| Pubs, clubs discos etc                               | 2009    | 28%       |
| Go shopping (pleasure)                               | 2009    | 25%       |
| Just walk/drive around                               | 2009    | 21%       |
| Botanical/public gardens                             | 2009    | 6%        |
| <b>Stopovers</b>                                     |         |           |
| Destination was only stopover                        | 2009    | 70%       |
| Trip included multiple stopovers                     | 2009    | 30%       |
| <b>No. Tourism Businesses</b>                        |         |           |
| Non-employing  | 2007    | 678       |
| Micro Business (1-4 employees)                       | 2007    | 357       |
| Small Business (5-19 employees)                      | 2007    | 318       |
| Medium to large business (>20 employees)             | 2007    | 129       |
| Total  | 2007    | 1,482     |

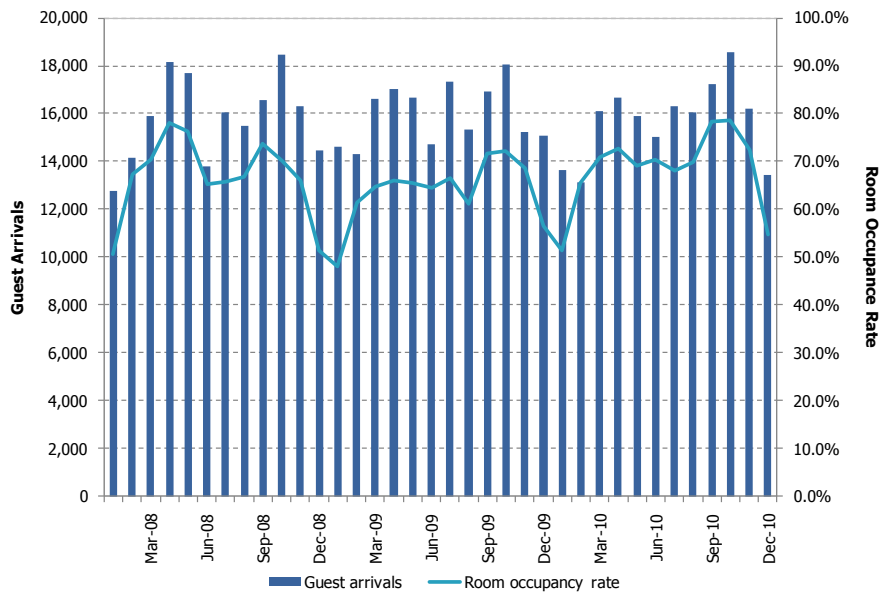
Source: Tourism Research Australia (2011)

### 5.3.3 Accommodation

Wagga Wagga offers 27 different hotel, motel and serviced apartments with 15 rooms or more. A total of 891 rooms are available in the Wagga Wagga region. The numbers of hotels, motels and serviced apartments have remained constant over the past three years, since March 2008; however the total number of rooms available in these 27 buildings has increased 17 rooms from 874.

Total guest arrivals in Wagga Wagga fluctuated between 12,000 and 18,500 guest arrivals per month with the largest months for arrivals being in April, May and September, October. During these months the room occupancy rate is between 70% and 80%, whereas for the other remaining eight months, the room occupancy rate fluctuates between 50 and 70%.

**Figure 5.2: Wagga Wagga’s Guest Arrivals and Room Occupancy Rates, 2008-2010**



Note: Hotels, Motels 15 or more rooms  
Source: ABS (2011b)



## 5.4 Retail

**Wagga Wagga offers a diverse retail offering including food, homewares, clothing, bulky goods retailers and specialty stores...**

The retail sector is the second largest employing industry in Wagga Wagga, employing a total of 3,275 people, or 11.4% of the total Wagga Wagga workforce.

The retail industry was estimated to contribute \$192 million in 2009-10, 6.7% of industry value-add. The retail sector includes most large national chains, and a vibrant range of independent retailers that provide an authentic Wagga Wagga retail experience. Cafes, fashion, homewares and furnishings all cater to the higher-order retail needs of the wider catchment and add to Wagga Wagga's appeal as a regional city with metropolitan services.

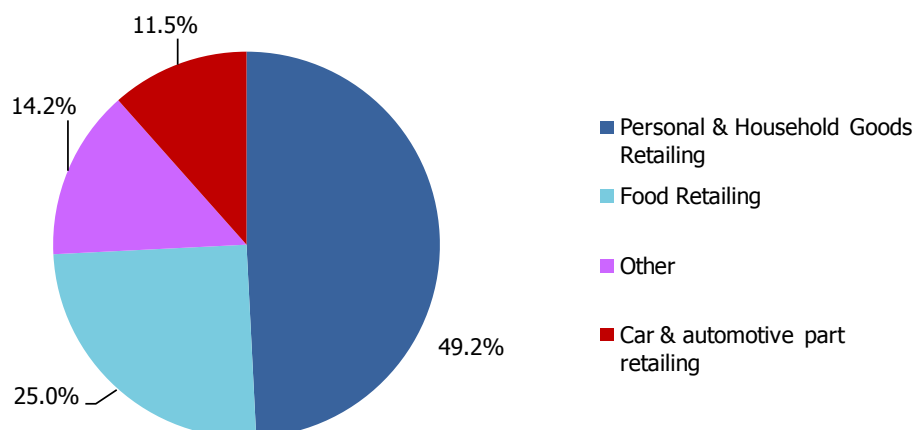
The major retail precinct in the Wagga Wagga Region is the CBD North and CBD South, which have Sturt Mall, Marketplace and Baylis Street retail areas/centres. The CBD North precinct is centred on Fitzmaurice Street which has a unique character inspired by the beautiful heritage buildings lining the street. South City is a major retail centre servicing the growing south western segment of the City, while bulky goods retailers are located in the dedicated Homebase centre as well as along Hammond Avenue/Sturt Highway and Dobney Avenue/Pearson Streets.

**Table 5.4: Retail Trade Summary**

| Description                | Wagga Wagga | Murrumbidgee | New South Wales |
|----------------------------|-------------|--------------|-----------------|
| <b>Employed</b>            |             |              |                 |
| No. of Employees (2009-10) | 3,275       | 6,400        | 341,733         |
| % Industry Employment      | 11.4%       | 5.5%         | 10.2%           |
| <b>Industry Value Add</b>  |             |              |                 |
| Value Add (\$'M) (2009-10) | \$192       | \$308        | \$16,580        |
| % of GVA                   | 6.7%        | 5.7%         | 4.8%            |
| <b>Business</b>            |             |              |                 |
| No. of Businesses (2009)   | 372         | 951          | 16,694          |
| % of Businesses            | 7.6%        | 6.1%         | 7.0%            |

Source: ABS (2007a), ABS (2010a), DEEWR (2010), AECgroup

**Figure 5.3: % of Employment in Wagga Wagga's Retail Trade Sector, 2006**



Note: The pie-chart represents % employment in the Retail Trade sector.  
Source: ABS (2007), AECgroup

## 5.5 Manufacturing

**Food product manufacturing is Wagga Wagga's key manufacturing sector, due to the presence of major food processors including Cargill's meat processing, Heinz Australia and Fonterra Brands Milk ...**

In 2009-10, the manufacturing sector employed an estimated 2,252 persons in Wagga Wagga and recorded an indicative industry gross value added of approximately \$309 million in 2009-10.

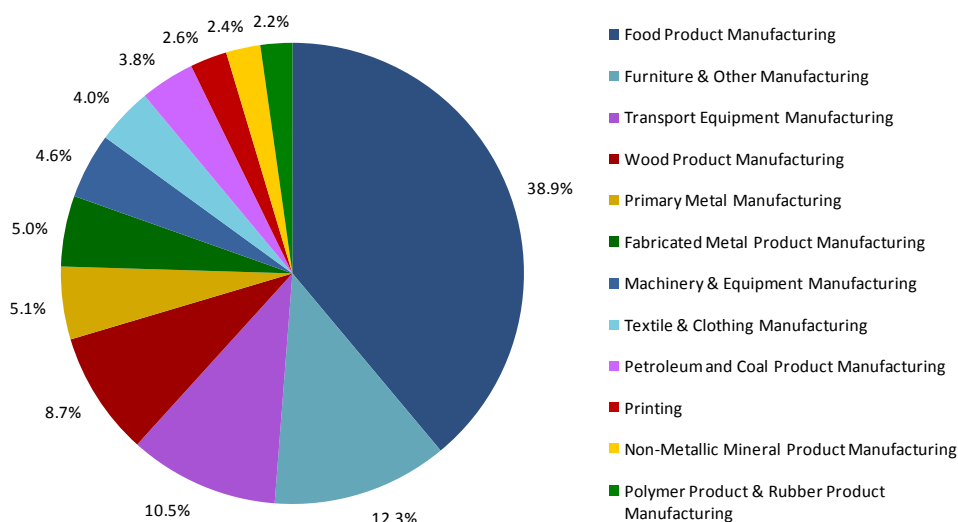
The manufacturing sector is one of the leading contributors to gross output in the region. Key industries within the manufacturing sector include the food product manufacturing and transport, machinery & equipment manufacturing sectors.

**Table 5.5: Manufacturing Summary**

| Description                | Wagga Wagga | Murrumbidgee | New South Wales |
|----------------------------|-------------|--------------|-----------------|
| <b>Employed</b>            |             |              |                 |
| No. of Employees (2009-10) | 2,252       | 6,589        | 279,827         |
| % Industry Employment      | 7.8%        | 15.9%        | 8.4%            |
| <b>Industry Value Add</b>  |             |              |                 |
| Value Add (\$'M) (2009-10) | \$309       | \$778        | \$35,592        |
| % of GVA                   | 10.8%       | 14.5%        | 10.3%           |
| <b>Business</b>            |             |              |                 |
| No. of Businesses (2009)   | 196         | 512          | 28,444          |
| % of Businesses            | 4.0%        | 3.3%         | 4.3%            |

Source: ABS (2007a), ABS (2010a), DEEWR (2010), AECgroup

**Figure 5.4: % of Employment in Wagga Wagga's Manufacturing Sector, 2006**



Note: The pie-chart represents % employment in the Manufacturing sector.  
Source: ABS (2007), AECgroup

### **Food Product Manufacturing**

Wagga Wagga is located in the Riverina Region, otherwise known as 'Australia's Food Bowl'. Wagga Wagga draws on the existing strengths of its agriculture sector to produce high quality food products. Over the past 20 years, Wagga Wagga has built its reputation for not only having strong linkages with the wider agriculture sector but also providing the necessary infrastructure (industrial, transport) and business services to be able to attract a number of key food manufacturers. These include:

- **Cargill Beef Australia** processes approximately 1,250 head per day and has approximately 650 employees' at its Wagga Wagga plant. Cargill supplies grain-fed and grass-fed beef to both the domestic and international market. The Wagga Wagga location provides access to excellent cattle genetics and ample grain supplies for grain-fed cattle. The proximity of Sydney and Melbourne is a major benefit for the plant as it decreases the transportation costs for Cargill's domestic customers, and accessing shipping ports for export products.
- **Heinz Australia** bought the Southern Country Foods business with operations in Wagga Wagga producing canned meat products. The Heinz plant today employs over 100 people in Wagga Wagga and exports its meat products around the world.
- **Riverina Oil and Bio Energy** established a 500 tonne per day oilseed crushing and edible oil refining plant at the Bomen Business Park in Wagga Wagga in 2009. Stage One of the plant is expected to produce 105,000 tonnes per annum of vegetable protein meal used in poultry, dairy and in animal feed industry plus 65,000 tonnes per annum of refined vegetable oil for the food manufacturing and food service / retail industry. Canola, Safflower, Cottonseed, Soybean and Sunflower are the key inputs processed at the plant. The second stage will be constructed in the future with the view of producing up to 75 million litres/ annum of biodiesel at the same site in Bomen.
- **Wineries:** There are a number of boutique wineries in Wagga Wagga which grow their own grapes as well as purchasing grapes from vineyards in the surrounding regions either extending west into the grape growing country around Griffith or east into the more recently established cool-climate vineyards around Tumbarumba.
- **Fonterra Brands, Riverina Fresh Milk** employs 100 people at its Hammond Avenue site and processes milk for fresh milk markets as well as cream, yoghurts and cream cheese; and
- **Charles Sturt Cheese Factory** produces boutique cheeses from local milk, specialising in Australian Native Flavours in their cheddar cheeses.

### **Emerging Technologies & Opportunities for Wagga Wagga**

The nature of manufacturing is changing in Australia. This is due to a number of factors including:

- Growing competition from emerging international economies (e.g. India and China) - offering high quality products at competitive prices;
- The strength of the Australian dollar; and
- High operational costs attached to on-shore manufacturing (e.g. labour costs) when compared to other areas outside of Australia.

Over the past decade, each of these factors have continued to impact profit margins, ultimately resulting in many traditional manufacturing businesses moving offshore for their main commercial activities.

Replacing these industries have been the emergence of higher technology and value-adding industry - industries which have lower employment dependency and higher levels of productivity than other more traditional manufacturing industries in Australia. These types of high-technology and value-adding industries have specialist requirements when selecting a site for industrial/commercial investment, including:

- Land affordability;
- Accessibility to national distribution networks and major urban centres;
- Access to high-speed broadband and communications technology;
- Lands fully serviced with adequate utilities;
- Accessibility to a skilled workforce and associated training and research facilities (e.g. Universities, etc.); and
- Clustering of industry.

Wagga Wagga is a highly accessible regional City, with the Sturt and Hume Highways providing efficient linkages between Sydney and Melbourne. Wagga Wagga has a well established and growing manufacturing sector, which leverages these locational aspects, in addition to availability and affordability of serviced industrial land, and its ability to attract and retain skilled workers due to its reputation as a highly livable regional City.

Wagga Wagga also has the capacity to develop and support its local industries through the presence of the Charles Sturt University and associated research facilities.

Wagga Wagga has already demonstrated its ability to attract emerging industries through the development of Riverina Oils and Bio Energy and a number of high quality food processing businesses. As a leading regional City, Wagga Wagga has a competitive edge over major Cities which have often been built-out or require brown-field development at significant cost with limited opportunity for expansion. On a cost basis, industrial lands in regional areas generally provide a competitive product at lower cost and there is opportunity for cost-savings through more affordable labour inputs.

As the nature of manufacturing in Australia continues to change over the next 10 years, Wagga Wagga will have the opportunity to attract and grow its manufacturing base by catering to the changing needs of the industry. For Wagga Wagga, this is not only about promotion of the Wagga Wagga brand but also accommodating to the changing needs of industry to support the adoption of new technologies, whilst incubating research and training initiatives to support attraction of suitable industry to the region.

## 6. Housing & Investment Overview

The Wagga Wagga Housing & Investment Overview details:

- The number and value of **dwelling approvals**;
- **Housing tenure**;
- **Residential sales** (number and median sales prices);
- **Rents**;
- **Home loan repayments**;
- **Non-Residential building** approval activity; and
- **Major projects and investment**.

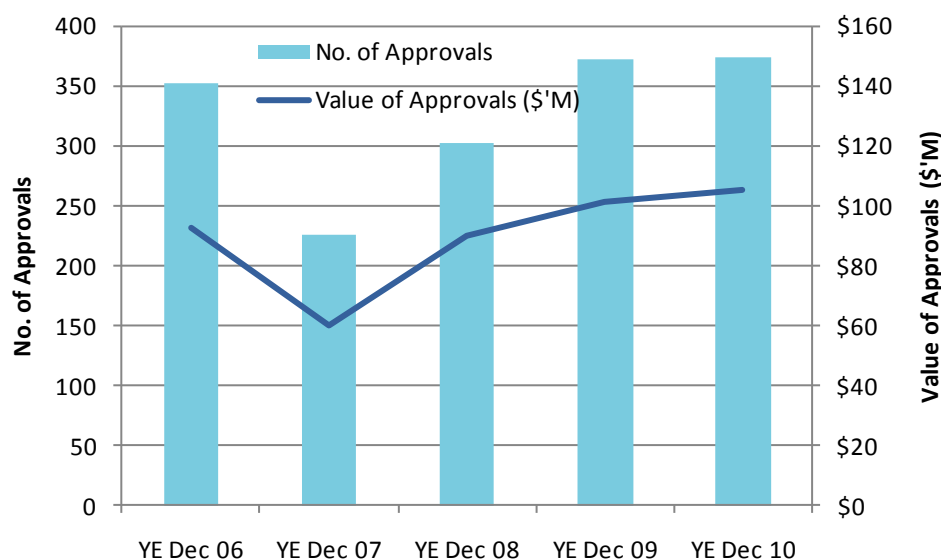
### 6.1 Dwelling Approvals

**Wagga Wagga's residential building activity has steadily increased over the past three years, following a slump in 2007. Average values per approval have also steadily climbed over the same period...**

Since 2007, Wagga Wagga has experienced steady growth in building approvals of 13.5% per annum, to a total of 374 residential building approvals in the year ended December 2010. This period of intense growth came after a slump in Wagga Wagga's building activity which coincided with the onset of the global economic downturn.

Wagga Wagga's residential building activity has since returned to and exceeded pre-2007 levels of building activity which is reflective of the strong economic recovery (and population growth) which the region has experienced.

**Figure 6.1: Residential Building Approvals, Number & Value, 2006-2010**



Note: The residential building approvals counts are based upon construction certificates issued for dwellings.  
Source: ABS (2011c)

The total value of dwelling approvals for Wagga Wagga was \$105.3 million in the year ended 2010, an increase of 4.2% from the previous year. Average values per approval in Wagga Wagga were estimated at over \$281,000 in 2010 – below the State average in approval values and reflective of the relative affordability of new dwelling approvals in Wagga Wagga and the broader Murrumbidgee Region.

**Table 6.1: Residential Building Approvals, Year End December 2010**

|  | YE Dec 2010 | % Annual Change | % Four -Year Av. Annual Change |
|--|-------------|-----------------|--------------------------------|
| <b>Number (No.)</b>                    |             |                 |                                |
| Wagga Wagga                            | 374         | 0.5%            | 1.5%                           |
| Murrumbidgee                           | 673         | -11.0%          | -2.0%                          |
| New South Wales                        | 33,877      | 25.9%           | 1.8%                           |
| <b>Value (\$'M)</b>                    |             |                 |                                |
| Wagga Wagga                            | \$105.3     | 4.2%            | 3.3%                           |
| Murrumbidgee                           | \$187.1     | -7.3%           | -0.6%                          |
| New South Wales                        | \$10,625    | 26.1%           | 5.3%                           |
| <b>Average Value per Approval (\$)</b> |             |                 |                                |
| Wagga Wagga                            | \$281,572   | 3.7%            | 1.8%                           |
| Murrumbidgee                           | \$278,010   | 4.2%            | 1.5%                           |
| New South Wales                        | \$313,624   | 0.2%            | 3.7%                           |

Source: ABS (2011c)

## 6.2 Property Market

### 6.2.1 Housing Tenure Type

**Wagga Wagga has an above average proportion of households purchasing homes or renting, reflecting the relative affordability of the area to the younger age demographic of the region...**

In 2006, Wagga Wagga recorded a lower proportion of persons fully owning their home (32.0%) compared to the State (35.9%) and a higher proportion of persons purchasing (35.0%) and renting (32.1%) compared to the State (32.8% and 30.4%, respectively). This is primarily due to the lower cost housing (relative to the New South Wales average) and the younger age demographic in the region.

In 2006, Wagga Wagga recorded a lower cost of housing (lower home loan repayments) compared to the State, with Wagga Wagga one of the top 20 regions with the highest take up rate of the Commonwealth Government's First Home Buyers Grant (Business Wagga Wagga, 2008). The relatively low cost of housing in Wagga Wagga, in combination with this government scheme have been factors in increasing the number of households purchasing homes by 6.8% since 2001.

**Table 6.2: Housing Tenure Type, 2001-2006**

| Region                            | Fully Owned | Purchasing | Renting | Other |
|-----------------------------------|-------------|------------|---------|-------|
| <b>Wagga Wagga</b>                |             |            |         |       |
| 2006                              | 32.0%       | 35.0%      | 32.1%   | 0.9%  |
| 2001                              | 37.4%       | 28.1%      | 32.0%   | 2.5%  |
| % Change 2001-2006 <sup>(a)</sup> | -5.4%       | 6.8%       | 0.1%    | -1.5% |
| <b>New South Wales</b>            |             |            |         |       |
| 2006                              | 35.9%       | 32.8%      | 30.4%   | 0.9%  |
| 2001                              | 43.4%       | 24.6%      | 29.1%   | 2.9%  |
| % Change 2001-2006 <sup>(a)</sup> | -7.5%       | 8.2%       | 1.4%    | -2.1% |

Note: (a) This is a percentage point change.  
Source: ABS (2007)

## 6.2.2 Property & Sales Values

**Wagga Wagga has experienced steady growth in residential property prices over the past few years. However, median property prices remain well below New South Wales averages, highlighting the affordability of the housing in the region...**

For the year to September 2010, Wagga Wagga recorded median house prices of \$295,000, above the median house prices for the Murrumbidgee SD (\$217,500). Units and townhouse prices were also lower for the Murrumbidgee SD (\$180,650) compared to Wagga Wagga (\$201,000) over the same period.

Comparison of Wagga Wagga's house and townhouse median prices with New South Wales, show that Wagga Wagga has significantly lower costs of housing than compared with State median residential property prices. Similarly, Wagga Wagga has experienced lower median property price growth than the State for all residential property types.

It is this affordability of housing combined with high quality of life which continues to attract workers and their families to Wagga Wagga.

**Table 6.3: Median Property Prices, 2010**

| Statistic              | Period     | Indicator | Annual Change (%) |
|------------------------|------------|-----------|-------------------|
| <b>Wagga Wagga</b>     |            |           |                   |
| House                  | Sep Q 2010 | \$295,000 | 7.3%              |
| Unit                   | Sep Q 2010 | \$201,000 | 1.8%              |
| <b>Murrumbidgee</b>    |            |           |                   |
| House                  | Sep Q 2010 | \$217,500 | -4.1%             |
| Unit                   | Sep Q 2010 | \$180,650 | 6.0%              |
| <b>New South Wales</b> |            |           |                   |
| House                  | Sep Q 2010 | \$425,000 | 10.4%             |
| Unit                   | Sep Q 2010 | \$425,000 | 8.9%              |

Source: NSW Department of Housing (2011)

## 6.2.3 Home loan Repayments

**In line with median property price trends, Wagga Wagga records lower average home loan repayments than the State, however over the past five years it has experienced a higher than average level of growth...**

In 2006, Wagga Wagga recorded an average monthly home loan repayment of \$1,306, \$401 less than the New South Wales average of \$1,709. Wagga Wagga has a higher average monthly home loan repayment than the average for the Murrumbidgee SD region. Between 2001 and 2006, Wagga Wagga experienced average annual growth of 8.2%, above that observed in Murrumbidgee (6.5%) and New South Wales (8.0%).

**Table 6.4: Home Loan Repayments (2006)**

| Region                           | Average Monthly Home Loan Repayment | Average Annual % Growth (2001 – 06) |
|----------------------------------|-------------------------------------|-------------------------------------|
| Wagga Wagga                      | \$1,306                             | 8.2%                                |
| Surrounding Areas <sup>(a)</sup> | \$1,249                             | 6.5%                                |
| New South Wales                  | \$1,709                             | 8.0%                                |

Source: Australian Bureau of Statistics (2007)

## 6.2.4 Rental Bonds & Prices

**Wagga Wagga has lower rents when compared to New South Wales averages, supporting the affordability of housing in Wagga Wagga compared to other areas of New South Wales...**

In 2010, average weekly rents for Wagga Wagga were \$295 for houses and \$205 for flats and units. These prices were above the rental prices for both units and houses in the Murrumbidgee Region but well below the rental prices for New South Wales.

The level of new rental bonds for houses and flats and units lodged in Wagga Wagga for 2010 were 1,071 and 731 respectively, which equates to a decrease in new rental bonds of 2.5% for houses and an increase of 2.2% for flats and units compared to 2009.

**Table 6.5: Rental price & New Rental Bonds, YE December 2010**

|                        | 2 bedroom Flats/Units |                              | 3 bedroom Houses |                              |
|------------------------|-----------------------|------------------------------|------------------|------------------------------|
|                        | Rent \$/week          | New Bonds Issued (12 months) | Rent \$/week     | New Bonds Issued (12 months) |
| <b>Wagga Wagga</b>     |                       |                              |                  |                              |
| YE Dec 2009            | \$180                 | 731                          | \$280            | 1,071                        |
| YE Dec 2010            | \$205                 | 715                          | \$295            | 1,099                        |
| <b>Murrumbidgee</b>    |                       |                              |                  |                              |
| YE Dec 2009            | \$168                 | 1,617                        | \$235            | 2,435                        |
| YE Dec 2010            | \$167                 | 1,597                        | \$230            | 2,407                        |
| <b>New South Wales</b> |                       |                              |                  |                              |
| YE Dec 2009            | \$360                 | 106,945                      | \$310            | 82,092                       |
| YE Dec 2010            | \$380                 | 106,393                      | \$340            | 79,765                       |

Source: NSW Department of Housing (2011)

## 6.3 Commercial Building & Investment

**Non-Residential building investment has slowed over the 2010-2011 year following a year of peak investment in 2009. This slowing in investment is likely to be short lived as Wagga Wagga continues to attract major investment due to its offering of strategic geographic location, industrial infrastructure and workforce...**

### 6.3.1 Non-residential Building Approvals

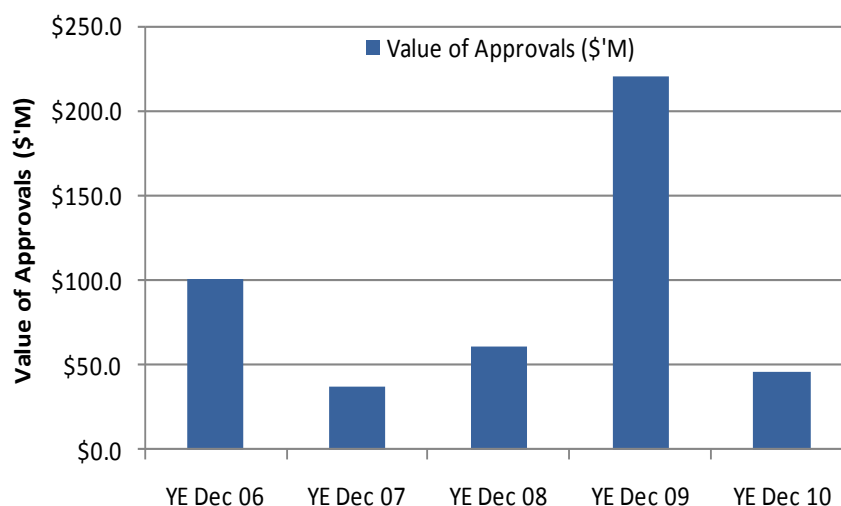
Non-residential building investment in Wagga Wagga experienced a peak of \$221.2 million in the year ended December 2009. This was driven by some major investment by Charles Sturt University, NSW TAFE Riverina Institute and construction of the Regional Express Australian Airline Pilot Academy, as well as federal and state infrastructure projects around Wagga Wagga. Stage 1 of the Riverina Oil and Bio Energy Refinery is under construction (refer to Section 5.5) in the Bomen Business Park and has an estimated value of \$65 million. The \$55 million Renewable Metal Technologies construction (also located at Bomen) commenced in 2009 and was completed in 2010.

**Table 6.6: Non-Residential Building Approvals, YE December 2010**

|                 | YE Dec 2010 (\$'M) | % Annual Change | % Four -Year Av. Annual Change |
|-----------------|--------------------|-----------------|--------------------------------|
| Wagga Wagga     | \$46.3             | -79.1%          | 6.1%                           |
| Murrumbidgee    | \$93.9             | -76.6%          | -4.8%                          |
| New South Wales | \$5,718            | -47.1%          | -8.4%                          |

Source: ABS (2011c)

**Figure 6.2: Value of Non-Residential Building Approvals (\$'M), Wagga Wagga 2006-2010**



Source: ABS (2011c)

In the year ended December 2010, the total value of non-residential building approvals was estimated to be \$46.3 million based upon construction certificates issued by the Wagga Wagga City Council.

Note that the value of local government issued construction certificates is a but a portion of actual value of non-residential building in Wagga Wagga for the Year Ended December 2010. Analysis of NSW Planning Major projects data (2011) and consultation with the Wagga Wagga City Council Planning Department indicates a further investment of \$253 million in surrounding infrastructure projects driven by infrastructure expenditure on the Hume Freeway duplication and the Bomen to Young gas pipeline in 2010.

### 6.3.2 Major Projects

Following a year of major developments approvals and investments, Wagga Wagga and the surrounding region is expected to experience a lower level of approvals and construction activity over the 2010 and 2011 year. Current major infrastructure and business projects which are underway or planned within the Wagga Wagga and the surrounding area include:

- **Wagga Wagga Base Hospital:** Wagga Wagga's new Base Hospital is estimated to have a total cost between \$300 million and \$400 million and the master plan includes three stages of development. The NSW State Government has pledged \$215 million and the Federal Government \$55 million towards the project.
- **Bomen Rail/Road Intermodal Hub:** This \$39 million project will involve re-organisation of the road patterns, elimination of the level crossing with a road overpass over the Sydney to Melbourne railway line, and development of an 80kph rail siding. The improved road and rail access to the Bomen Business Park will deliver additional investment to the Park creating in excess of 700 jobs during construction phases and 624 jobs for operational activity over a five year period.
- **Hume Highway Duplication:** Upgrade of five separate segments of the Hume Highway from the Sturt Highway to Mullengandra to transform the highway into a duel carriageway, increasing the total capacity of the Hume Highway across the region. The \$235 million Tarcutta Bypass also commenced in 2010.

- **Young to Wagga Wagga looping pipeline:** \$90 million duplication of the current 131km gas pipeline between Young and Wagga Wagga, doubling the capacity of gas transportation between the two locations.
- **Riverina Oils and Bio Energy Project (Stage 1):** \$65 million construction of an oil seed crushing and edible oil refining plant in Bomen.
- **Uranquinty Gas-Fired Power Station:** \$6 million upgrade to the current Uranquinty Gas-Fired Power Station including installation of a new de-mineralised water treatment plant, installation of a weather mast and installation and upgrading of general piping, mechanicals and civil works making the plant more water efficient.
- **Australian Airline Pilot Academy:** This is a \$25 million development. Construction of Phase 1 of Regional Express Airline's flight training facility at Wagga Wagga Airport was completed last year. The final development will be completed in 2014 and comprise training and simulator rooms, offices and 92 bedrooms for trainee pilots and stewards, with a targeted intake of 200 students a year.
- **Wagga Wagga Airport:** A \$12 million development of the airport will commence in 2012 and include a new apron and hangar zones, and 32 hangars in an upgraded Light Aircraft precinct.
- **Road and bridge infrastructure reconstruction after flood events:** \$30 million will be injected into the Wagga Wagga economy from Federal and State government funds to repair the infrastructure damaged in three flood and storm events in 2010. This is estimated to increase Wagga Wagga's Gross Regional product by some 0.6% over the next 12 month period.
- **Charles Sturt University:** \$46 million investment is planned for a new National Life Sciences hub; \$10 million expansion to the National Wine and Grape Industry Centre; \$16 million for 175 new residences; \$7 million for new gallery and library renovations; and another \$15 million for other office and infrastructure upgrades.

## 7. Infrastructure Review

This Section identifies the existing infrastructure that represents key assets for Wagga Wagga and the surrounding Murrumbidgee Region. Key infrastructure can be categorised as:

- **Transport** (road, rail, air);
- **Utilities** (electricity & gas, water, waste); and
- **Social** (health & education).

### 7.1 Transport Infrastructure

***Wagga Wagga has access to an integrated transport network that supports population growth, industry activity and accessibility to the region and provides multimodal connectivity between regions and States...***

The Wagga Wagga region has a highly valuable combination of road, rail and airport infrastructure located in close proximity to major trade route infrastructure. Wagga Wagga is a key transport node between Sydney and Melbourne and the wider New South Wales and Victorian regions.

Key transport infrastructure of the Wagga Wagga region includes:

- The intersection of the Olympic and Sturt Highways, which provides road linkage between the Sydney and Melbourne trade route;
- A regional airport with daily passenger services to Sydney and Melbourne; and
- The major Sydney-Melbourne rail line with daily direct freight connections to the Port of Melbourne.

#### 7.1.1 Road

Wagga Wagga is situated at the intersection of the Olympic and Sturt Highways and forms an integral part of the Riverina transport network. Wagga Wagga provides a vital trade route link between the markets, seaports and international airports on the eastern seaboard and the south western New South Wales primary production sectors. Wagga Wagga is home to major transport and freight companies, which service the Victorian, South Australia and New South Wales markets.

Wagga Wagga is approximately equidistant from Melbourne and Sydney, with access to over two-thirds of Australia's population within less than five hours by road. This strategic location provides many logistical advantages to road freight companies in the Riverina region, allowing freight to be delivered to major state and interstate ports and airports with shorter 'on-road' transport times and lower costs.

#### 7.1.2 Airport

##### **Civil**

The civil component of Wagga Wagga airport is owned by the Commonwealth (RAAF) and leased to Wagga Wagga City Council. The area covers approximately 202 hectares and includes two runways (one grass and one sealed). The Wagga Wagga Airport is serviced by daily QantasLink flights to Sydney and Regional Express flights to Sydney and Melbourne.

In the year ended June 2010, the Wagga Wagga airport recorded a total throughput of 210,307 passengers and 22,820 aircraft movements, of which regular public transport (RPT) movements accounted for 36%.

Passenger numbers at the Wagga Wagga Regional Airport have increased at a compound rate of 4% p.a. since 1984/85.

### **Defence**

The Royal Australian Air Force's RAAF Base Wagga, in NSW's Riverina region, is home to Air Force trade training schools. Over the past few years, the RAAF base has undergone a \$60 million upgrade of training and accommodation facilities. Training facilities upgraded include:

- No. 1 recruit training wing for airmen/women;
- Ground training wing;
- School of administration & logistics training;
- School of technical training;
- School of postgraduate training;
- ADF school of signals;
- National aerospace training centre of excellence; and
- Combat support unit Wagga-base managers.

### **7.1.3 Rail**

#### **Passenger Services**

CountryLink offers twice-daily services to Sydney and Melbourne.

#### **Freight**

Situated on the main southern rail Link in New South Wales, Wagga Wagga is serviced by daily rail freight services direct to the Port of Melbourne. Rail capacity for freight transport in the region has been expanded to accommodate the increasing demand for freight infrastructure to support the growing exports industry from the region. To assist exports growth the Port of Melbourne has located an office in Wagga Wagga. A new rail bridge at Wagga Wagga was also opened in 2007 to accommodate an additional 22 trains to pass through Wagga Wagga per day.

Wagga Wagga contains a rail/road intermodal hub for the speedy transition of freight from road to rail (a more environmentally friendly freight system). At present the majority of exports from Wagga Wagga leave Australia through the Port of Melbourne. The Wagga Wagga hub will be able to redirect these exports to the facilities of Port Botany Bay in Sydney.

## **7.2 Utilities Infrastructure**

***Wagga Wagga has extensive utilities infrastructure capable of supporting ongoing population and industry growth in the area...***

### **7.2.1 Electricity & Gas**

Wagga Wagga is strategically situated on the New South Wales electricity grid and is supported by a distribution network supplied by the Bomen, Copland and Gregadoo substations. By industry standards, the reliability of supply in Wagga Wagga is considered to be high within the City and at the Bomen Business Park. The local distributor for electricity and natural gas is CountryEnergy, recently purchased by Origin.

Natural gas is supplied to 92% of residential, commercial and industrial properties in Wagga Wagga from the Moomba gas line from South Australia and the Victorian gas fields.

### 7.2.2 Water

Water in Wagga Wagga is sourced from the Murrumbidgee River and the East, West and North Wagga Wagga Borefields. Filtration, chlorination and aeration are undertaken at treatment facilities in Wagga City and the surrounding area. It is believed that there are sufficient water resources within Wagga Wagga to support continued population and industry growth in the region.

### 7.2.3 Waste

The Wagga Wagga sewerage network services over 18,000 residential and 2,000 non-residential properties. The Bomen Industrial Sewerage Treatment Facility (BISTF) has been specifically designed to deal with industrial wastes. This facility will be able to accept higher strength waste, facilitating further industrial development and maintaining environmental standards.

## 7.3 Social Infrastructure

***Wagga Wagga is a key services centre that provides the surrounding Murrumbidgee region with access to key health, education and community services...***

### 7.3.1 Health

Wagga Wagga is the main service delivery point for health services in the region, servicing in excess of 250,000 people. Health facilities located within the region include:

- Wagga Wagga Base Hospital - a 220 bed facility;
- Calvary Health Care Riverina - a 104 bed facility (private);
- Calvary Cancer Centre;
- The Riverina Cardiovascular and Physiology Centre;
- Wagga Medical Imaging;
- Douglass Hanley Moir Pathology Laboratory & Collection Clinic;
- The Calvary Specialists Clinic;
- 14 General practice surgeries with 45 General Practitioners; and
- Nursing homes, with more than 200 beds and 71 beds for dementia sufferers.

Wagga Wagga also provides a number of ancillary health and well being facilities including private day surgeries, retirement villages and nursing homes, community health centres, alternative health services, daycares and early childhood centres.

### 7.3.2 Education

Wagga Wagga is a regional education centre providing educational opportunities from primary and early childhood to tertiary education. The key educational facilities are outlined in the table below.

**Table 7.1: Wagga Wagga's Major Educational Facilities**

| Educational Facility                        | Description   |
|---|---|
| Early Childhood/ Preschool/ Primary Schools | There are 25 facilities that cater for early childhood to pre-school education in Wagga Wagga. There are 24 public and private primary schools in Wagga Wagga   |
| Secondary Schools                           | Wagga Wagga has eight secondary schools (three public and five private secondary schools), each providing specialist education across a range of educational areas including artistic, sporting, academic and cultural areas.   |
| TAFE NSW: Riverina Institute                | Wagga Wagga is home to three of the 19 Riverina Institute of TAFE campus' which feature the Primary Industries Centre (North Wagga Wagga) providing specialist training in crops, livestock & horticulture, the National Aerospace Centre of Excellence (Forest Hill RAAF base) and the Tourism & Technology Centre (City |

| Educational Facility                                    | Description   |
|---|---|
|   | Campus). In 2009, the NSW Riverina TAFE recorded 10,000 student enrolments.   |
| Charles Sturt University                                | The Charles Sturt University recorded a total of 12,000 student enrolments in 2008. Over 100 courses are provided by the university at the Wagga Wagga campus including degrees in arts, commerce, education, health, science, dentistry and agriculture. Of particular note are the newly expanded veterinary science school and centre for research in agriculture studies and viticulture. The university is also known for the production of its award winning wines and cheeses at its factory located in Wagga Wagga. |
| Special Needs   | There are two facilities that provide specialist education for students that learning and intellectual disabilities: Kurrajong Early Intervention Services and the Willians Hill Public School.   |
| Riverina Conservatorium of Music                        | The Riverina Conservatorium of Music fosters the strong cultural and musical interests in the region for pupils of all ages. The Conservatorium provides vital links to the cultural arts of the region. A total of 1,100 students are currently enrolled from infants to people well into their 80's.  |
| Regional Express (Rex) Australian Airline Pilot Academy | The Regional Express's Australian Airline Pilot Academy opened in 2010 and will train more than 200 pilots annually for both Australian and international airlines. Its state-of-the-art facility will include modern classrooms, flight simulators, new training aircraft, motel-style accommodation, as well as social and recreational facilities for trainees.  |
| UNSW's Wagga Wagga Campus Rural Clinic School           | Located within the grounds of the Wagga Wagga Base Hospital, the school is aimed at providing medical students in years 4, 5 and 6 with clinical exposure leading up to the completion of their degree.   |
| EH Graham Centre of Agricultural Innovation             | The EH Graham Centre undertakes world class research and education focusing on the major global challenges of climate change, water scarcity, food security, bio-security, pest management and environmental and human health. The centre is run by a joint alliance between Industry and Investment NSW and Charles Sturt University and has been running since 2005.  |

Source: Business Wagga Wagga (2008), Wagga Wagga City Council (2011)

## 8. Comparison with Other Regional Areas

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Five years ago the regional Cities of Albury, Armidale, Bathurst, Dubbo, Orange, Tamworth and Wagga Wagga formed an alliance to promote regional NSW Cities as a highly desirable places to live, work and play. These Cities were designated as EvoCities within the regional NSW context – Cities which as defined as clean and green, vibrant, dynamic, innovative, professional, accessible and globally linked.

This Section discusses Wagga Wagga's economic performance and competitive advantage as an EvoCity in regional NSW in two parts:

- **EvoCity Statistics:** Wagga Wagga's status as an Evocity compared to other EvoCities in regional NSW. This section presents key statistics that benchmark the economic performance of Wagga Wagga over time against other EvoCities (refer to Table 8.1.); and
- **EvoCity Survey Results:** An overview of the EvoCity Survey that was undertaken in 2009.

### 8.1 EvoCity Statistics: Wagga Wagga's Performance

Wagga Wagga is positioned as a leading EvoCity compared to other regional centres and EvoCities of New South Wales. Comparison of EvoCity statistics (refer to Table 8.1.) show that Wagga Wagga has:

- The largest population base and strong historical population growth;
- The largest labour force and a mid-range unemployment rate (5.2%);
- Strong historical GRP growth, resulting in the largest GRP;
- Significantly higher levels of building investment (\$) per capita; and
- The third highest residential property prices (not the highest).

It is Wagga Wagga's strong growth in population and GRP that has allowed for the provision of a number of major industry and community assets and education facilities to make Wagga Wagga a leading inland City of regional New South Wales.

Compared to other regional centres Wagga Wagga's strength is in its ability to cater for both population and business services for the broader region. Wagga Wagga also provides the necessary infrastructure to support a diverse range of industrial and defence activities and over time has been able to diversify its economic structure and minimise its risks.

Wagga Wagga offers a vibrant tourism and events sector which attracts many visitors and offers a high quality of life to its residents.

**Table 8.1: EvoCities Regional Comparisons**

| Description                                       | Period      | Wagga Wagga | Dubbo                    | Bathurst Regional   | Orange              | Tamworth Regional | Albury    | Armidale  |
|---|-------------|-------------|--------------------------|---------------------|---------------------|-------------------|-----------|-----------|
| <b>Population</b>                                 |             |             |                          |                     |                     |                   |           |           |
| Population Number                                 | 2010        | 63,500      | 41,763                   | 39,915              | 39,329              | 59,461            | 51,112    | 25,855    |
| % Av. Ann. Growth (2001-2010)                     | 2010        | 1.3%        | 0.8%                     | 1.2%                | 0.7%                | 1.1%              | 1.3%      | 0.5 %     |
| <b>Employment</b>                                 |             |             |                          |                     |                     |                   |           |           |
| Labour Force (No.)                                | Sep Q 2010  | 33,767      | 22,488                   | 21,540              | 20,527              | 31,329            | 26,603    | 13,324    |
| 5 Year Av. Ann. Growth (%)                        | Sep Q 2010  | 2.1%        | 2.2%                     | 6.3%                | 1.7%                | 6.4%              | 3.2%      | 6.1%      |
| Employed Persons                                  | Sep Q 2010  | 32,016      | 21,521                   | 20,474              | 19,596              | 29,468            | 24,596    | 12,586    |
| 5 Year Av. Ann. Growth (%)                        | Sep Q 2010  | 2.1%        | 2.2%                     | 6.1%                | 1.6%                | 6.4%              | 3.0%      | 6.0%      |
| Unemployment Rate (%)                             | Sep Q 2010  | 5.2%        | 4.3%                     | 4.9%                | 4.5%                | 5.9%              | 7.5%      | 5.7%      |
| 5 Year Change (%) <sup>(a)</sup>                  | Sep Q 2010  | 0.0%        | 0.2%                     | 0.9%                | 0.1%                | 0.0%              | 0.6%      | 0.4%      |
| Average Annual Salary (ATO)                       | 2007-08     | \$38,963    | \$38,372                 | \$40,405            | \$41,317            | \$36,572          | \$38,762  | \$36,104  |
| <b>Business Activity</b>                          |             |             |                          |                     |                     |                   |           |           |
| Gross Regional Product (\$'m)                     | 2009-10     | \$3,391     | \$2,275                  | \$1,983             | \$2,189             | \$2,739           | \$2,483   | \$1,200   |
| 4 Year Ann. Growth (%)                            | 2009-10     | 3.3%        | 5.6%                     | 4.9%                | 0.5%                | 4.1%              | 1.2%      | 3.5%      |
| Gross Industry Value Add (\$'m)                   | 2009-10     | \$2,853     | \$2,066                  | \$1,801             | \$2,016             | \$2,477           | \$2,241   | \$1,076   |
| Av. GRP (\$)/employee                             | 2009-10     | \$117,555   | \$115,902                | \$110,059           | \$129,772           | \$107,849         | \$91,405  | \$101,256 |
| No. Businesses                                    | 2009        | 4,937       | 3,628                    | 3,198               | 3,003               | 5,627             | 4,190     | 2,300     |
| <b>Building &amp; Construction</b> <sup>(c)</sup> |             |             |                          |                     |                     |                   |           |           |
| No. Dwelling Approvals                            | YE Dec 2010 | 374         | 211                      | 174                 | 406                 | 359               | 267       | 208       |
| % 1 Year Growth                                   | YE Dec 2010 | 0.5%        | -21.9%                   | -5.4%               | 52.6%               | -28.1%            | -13.0%    | 131.1%    |
| Value of dwelling Approvals (\$'M)                | YE Dec 2010 | \$105.3     | \$62.1                   | \$48.4              | \$97.2              | \$92.8            | \$78.3    | \$53.5    |
| % 1 Year Growth                                   | YE Dec 2010 | 4.2%        | -3.6%                    | 7.3%                | 40.5%               | -18.3%            | 0.1%      | 97.9%     |
| Value of non-dwelling approvals (\$'M)            | YE Dec 2010 | \$46.3      | \$51.9                   | \$7.4               | \$35.7              | \$46.3            | \$29.7    | \$40.6    |
| % 1 Year Growth                                   | YE Dec 2010 | -79.1%      | -27.4%                   | -84.0%              | -12.4%              | -41.8%            | -65.8%    | 318.2%    |
| Total Building Investment (\$) per Capita         | YE Dec 2010 | \$151.6     | \$114.0                  | \$55.8              | \$132.9             | \$139.1           | \$108.0   | \$94.1    |
| % 1 Year Growth                                   | YE Dec 2010 | -53.0%      | -16.1%                   | -39.0%              | 20.9%               | -28.0%            | -34.6%    | 156.1%    |
| <b>Median Property Prices</b>                     |             |             |                          |                     |                     |                   |           |           |
| Median Sales Price - House (\$)                   | Sep Q 2010  | \$295,000   | \$265,000 <sup>(s)</sup> | \$290,000           | \$310,000           | \$275,000         | \$273,000 | \$230,000 |
| % 1 Year Growth                                   | Sep Q 2010  | 7.3%        | 11.3% <sup>(s)</sup>     | 11.5%               | 10.6%               | 19.6%             | 11.4%     | 9.5%      |
| % 5 Year Growth                                   | Sep Q 2010  | 4.7%        | 3.2%                     | 1.9% <sup>(s)</sup> | 3.3% <sup>(s)</sup> | 3.2%              | 2.6%      | 7.5%      |

| Description                              | Period      | Wagga Wagga | Dubbo     | Bathurst Regional   | Orange                   | Tamworth Regional | Albury    | Armidale  |
|--|-------------|-------------|-----------|---------------------|--------------------------|-------------------|-----------|-----------|
| Median Sales Price – Townhouse/Unit (\$) | YE Dec 2010 | \$201,000   | \$164,000 | \$197,000           | \$270,000 <sup>(s)</sup> | \$180,000         | \$160,000 | \$213,000 |
| % 1 Year Growth                          | YE Dec 2010 | 1.8%        | n/a       | 15.9%               | 30.2% <sup>(s)</sup>     | 2.9%              | -8.0%     | 12.1%     |
| % 5 Year Growth                          | YE Dec 2010 | 1.1%        | 1.8%      | 1.3% <sup>(s)</sup> | 7.9% <sup>(s)</sup>      | 2.4%              | 2.1%      | 8.2%      |

Note: (a) Percentage point change. (s) 30 or less properties sold. (c) Approvals data is based upon construction certificates issued.  
Source: ABS (2007a), ABS (2007b), ABS (2010a), ABS (2010b), Australian Property Investor (2010), DEEWR (2010), NSW Department of Housing (2010), NSW Planning (2010), AECgroup

## 8.2 EvoCity Survey Results: Why Choose to Live in an EvoCity?

**Wagga Wagga is a highly attractive Evocity. It offers challenging and satisfying jobs and careers, a multitude of sporting and cultural pursuits, affordable housing and a wonderful location in close proximity to lakes, mountains and the historic Riverina District...**

As a part of the EvoCities initiative (2011), an independent online survey was undertaken to better understand the perception of EvoCity liveability, attractiveness for relocation and quality of life offering, when compared to more metropolitan areas of Australia. The EvoCity survey – or the EvoIndex – canvassed 1,000 Sydney and 400 Evocity residents, with a focus on the differences in the cost of living between Sydney and regional cities.

Key findings of the survey found that:

- **68% of Sydney residents had considered living elsewhere, with the main reason for wanting to relocate being a lifestyle change** (63% of respondents). Other primary reasons for wanting to leave Sydney were:
  - Housing prices;
  - Cost of Living; and
  - Traffic/Congestion.
- **Almost 40% of respondents would consider an EvoCity lifestyle change** (Albury, Armidale, Bathurst, Dubbo, Orange, Tamworth and Wagga Wagga);
- **A higher proportion of EvoCities respondents (compared to Sydney respondents) stated that they had a good work/life balance and enough time for family.** 58% of Sydney residents believed they had a good work/life balance, compared to 78% of Evocity residents. Only 56% of Sydney residents believe they have enough time outside of work for their family, as opposed to the 74% of Evocity residents.
- EvoCities were also found to offer:
  - Lower levels of work stress;
  - Lower travel times
  - Lower travel costs; and
  - More acceptable working hours.

### What does this mean for Wagga Wagga?

Wagga Wagga is a highly competitive City in the Evocity movement. It offers a well weighted balance between the businesses and industries of a large city, with all the quiet charm that is to be expected of a regional city. With a population of 63,500 and growing, the Wagga Wagga economy is one which is well diversified, and is well placed to offer a wide variety of job opportunities across a range of industries and areas of expertise. In this sense, Wagga Wagga has significant ability in attracting many Sydney-siders that may be seeking a 'tree-change' to an EvoCity environment.

Wagga Wagga's record in attracting new residents from outside of the Murrumbidgee Region is a strong one. This is evidenced by its historical population growth of 1.3% per annum since 2001 – the fastest growing inland City in New South Wales. Wagga Wagga is expected to continue to attract residents and businesses seeking a lifestyle change

through its offering of a quiet lifestyle, diversity of employment opportunities and affordability of property/ housing.

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|-------------------|---|--------------------------------------|--------|------------------------------------|
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