

Griffith City



Business Audit

February 19 2015: version ii



An Economic Development Project

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Purpose of the audit

The January 2015 Business Audit is the fourth successive year Griffith City Council's Economic Development Unit has completed this project in Griffith. In 2012, the Griffith Business Audit was conducted to establish data in relation to the number of bricks-and-mortar businesses and to track the movement in and out of the various business precincts to assist Council in decision making processes on the retail and commercial status of the commercial districts of Griffith.

Council's Economic Development Unit intends to conduct this audit annually to be able to measure the increase of the number of businesses, where business has moved and where the trends for business types can be identified.

This report will outline the method by which data was collected and will provide detailed results for each commercial precinct.

Aims

The aim of the Griffith Business Audit is to;

- Observe the diversity of retail and commercial activities which occupy bricks and mortar premises in the designated commercial zones;
- Observe the retail and commercial vacancy rates as one of many barometers of business health;
- Establish some credible evidence to determine commercial trends and to identify commercial hubs, and
- Create spatial mapping of industry sectors in the Griffith Local Government Area (LGA).

Objectives

The objectives of the Griffith Business Audit are to;

- Undertake a Business Audit every 12 months. Whilst recognising the nature of business movement is an ongoing process and given our limited resources, it is sufficient to conduct this audit on an annual basis,
- Identify where retail and commercial activity is thriving, in decline, changing /not changing, by undertaking trend analysis,
- Undertake comprehensive, accurate and annual data to assist in informing assumptions about the retail and commercial status of the Griffith business precincts.

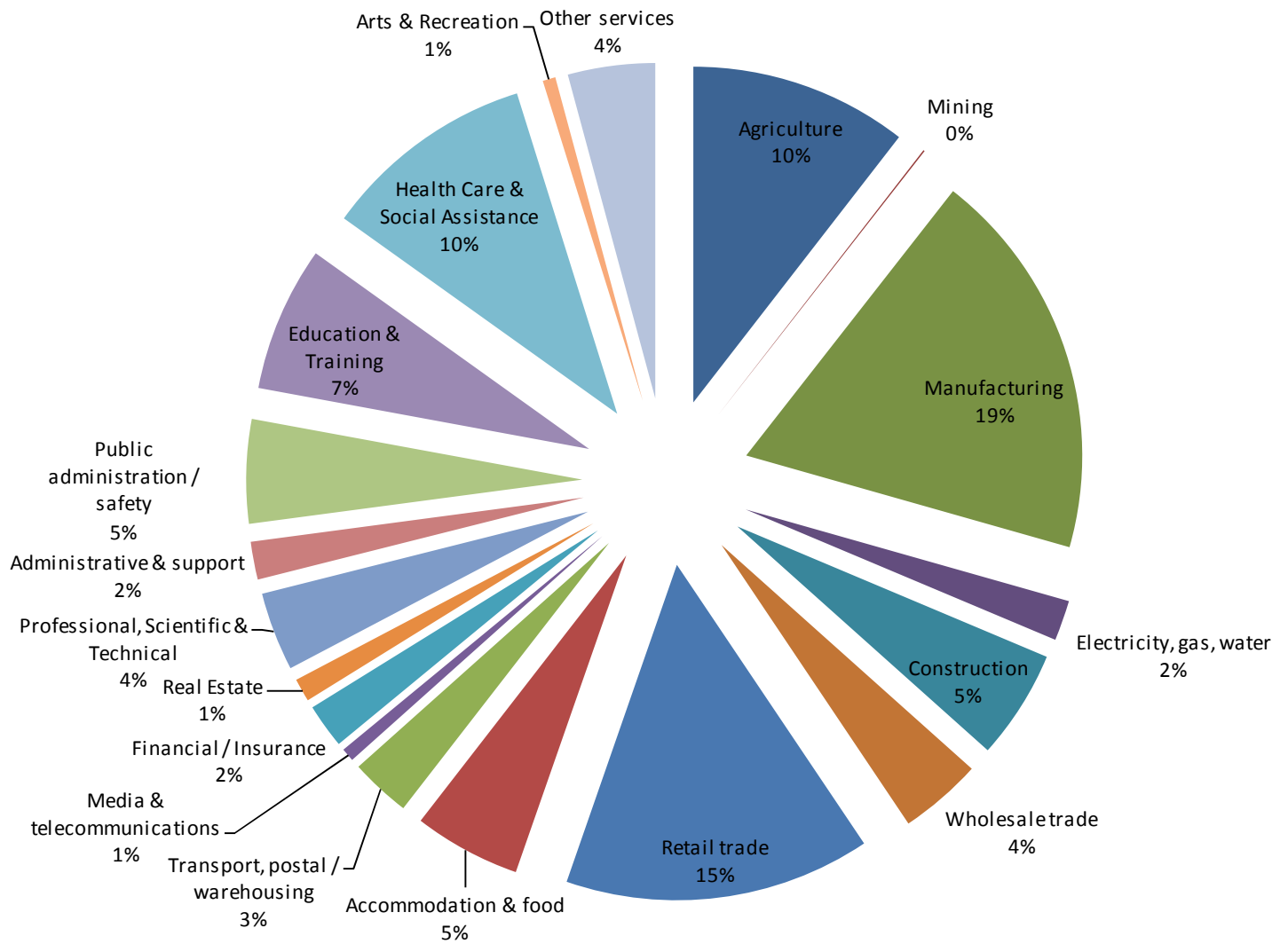
Griffith Business targeted areas

The business and commercial precincts targeted as part of the Griffith Business Audit include every area in which there is economic activity;

- Banna Avenue (BA)
- Yambil Street
- Wakaden Street
- Mooreville Industrial Area
- Battista Industrial Area
- Wickham Hill Industrial Area
- Yoogali
- Mackay Avenue
- Oakes Road
- Hanwood
- Yenda
- Tharbogang
- Bilbul
- Beelbanger
- Airport
- Hillston Road
- Kooyoo Street
- Ulong Street
- Palla Street
- East Griffith
- Murray Road
- Yoogali
- Hillston Road
- Ulong Street
- Jondaryan Avenue
- Favell Street
- Driver
- East Griffith
- Railway / Olympic
- Hometown (Bunnings)
- Willandra (including the Gateway Megacentre Harvey Norman)
- Benerembah Street

The results of the 2015 Business Survey Audit like other Business Audit Surveys which precede it will focus on bricks-and-mortar business in the main shopping precincts. The breakdown of the Local Government Area Industry of employment is outlined in the following pages, followed by the 2015 Griffith Business Audit results in detail.

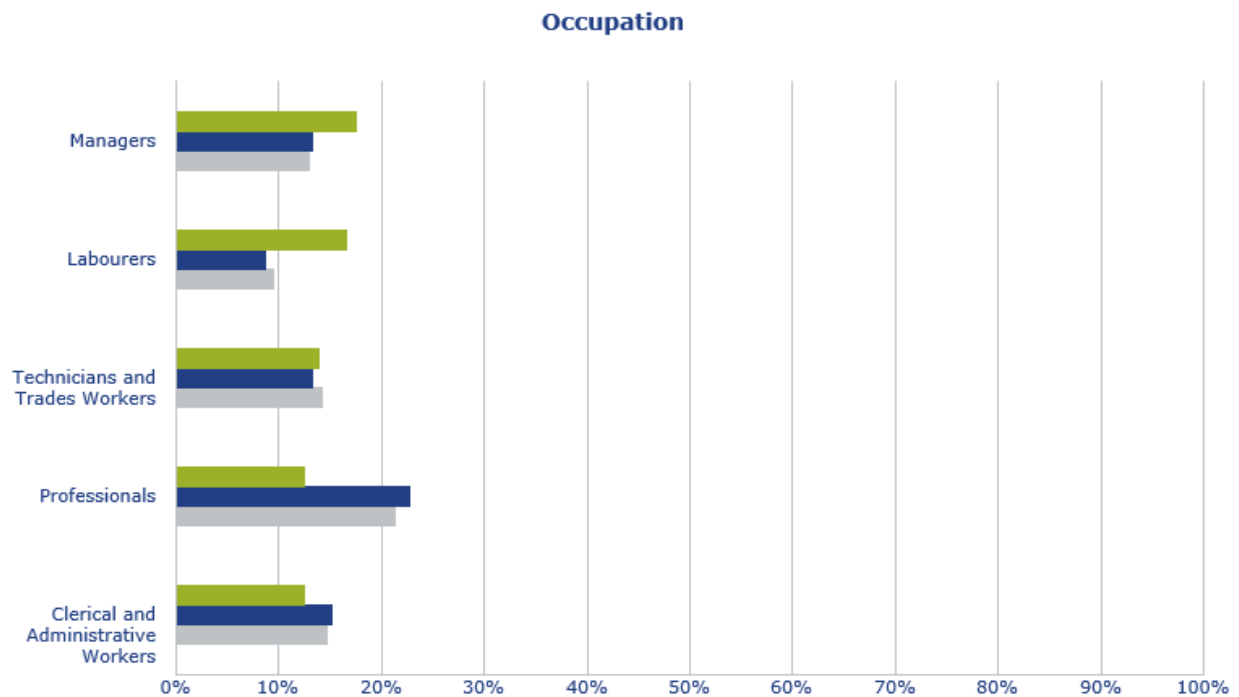
Griffith Workfoce by Industry 2011 ABS



Source: ABS 2011. Workforce relates to the breakdown of workers in the Griffith LGA by industry

Employment

There were 11,793 people who reported being in the labour force in the week before Census night in Griffith (C) (Local Government Areas). Of these 60.5% were employed full time, 28.0% were employed part-time and 4.9% were unemployed.



	Griffith
	NSW
	Australia

Source: ABS 2011

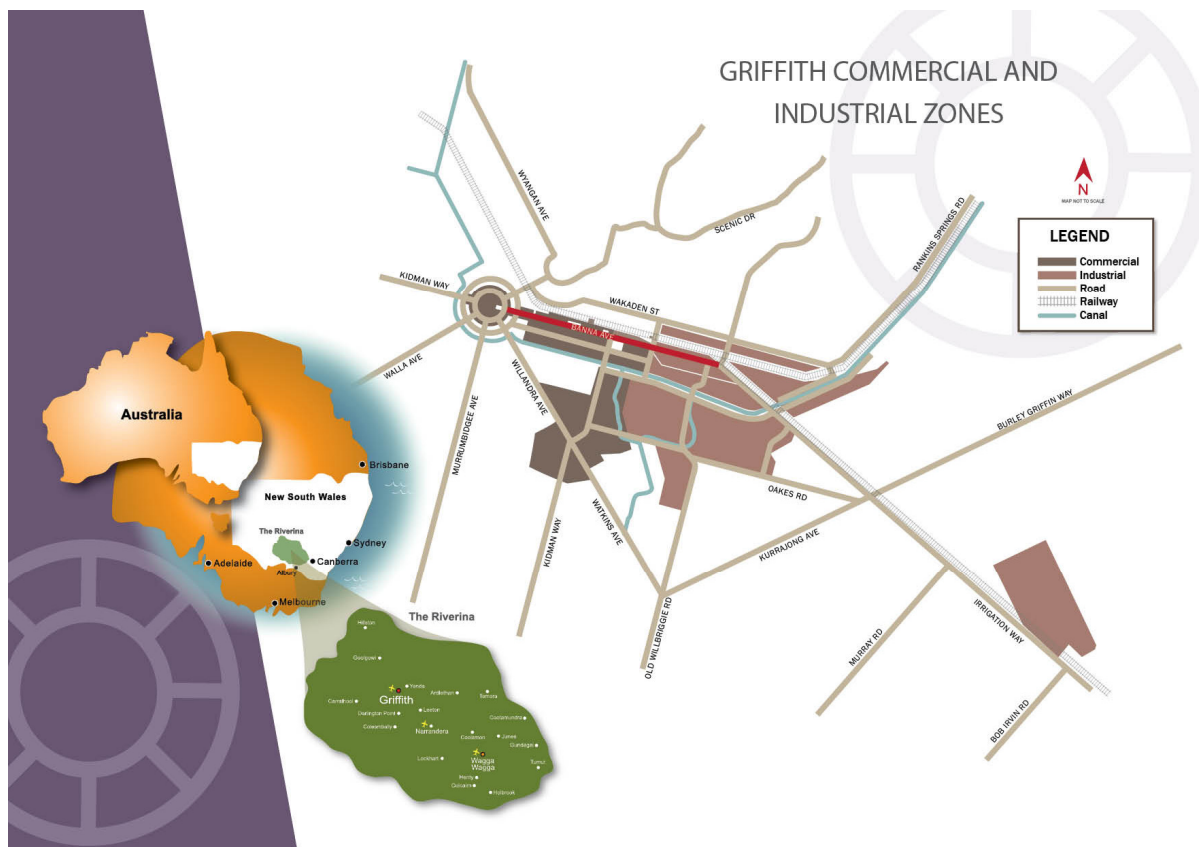
<u>Industry of employment, top responses</u>	Griffith (C)		New South Wales		Australia	
		%		%		%
<i>Employed people aged 15 years and over</i>						
Beverage Manufacturing	818	7.3	7,733	0.2	27,875	0.3
Fruit and Tree Nut Growing	586	5.2	4,779	0.2	24,902	0.2
School Education	523	4.7	138,795	4.4	467,373	4.6
Meat and Meat Product Manufacturing	502	4.5	13,369	0.4	44,207	0.4
Supermarket and Grocery Stores	371	3.3	68,669	2.2	235,773	2.3

Source: ABS 2011

Results

1.1 Audit Area

Griffith City Council's main street, Banna Avenue, is characterised by the long avenue of shady London Plane trees, a mix of retail stores including clothing, home wares, footwear, al fresco cafes and restaurants, accommodation, banking, real estates, electrical, hair and beauty, butchers, greengrocer, toy and speciality stores.



Existing Business Premises

Banna Avenue

In 2015 the audit revealed an increase in shopfront vacancies as well as an increase in new businesses. The audit revealed a higher number of business movements into Banna Avenue as well as out of this precinct.

Again, similar to previous years, the same shopfronts remained vacant. These included the old Murrumbidgee Irrigation depot site, Rice Growers site and Penfold Wines site, which are in a state of disrepair.

A fire in the top block at the end of 2014 disrupted a number of businesses contributing to the movement figures.

It is pleasing to note the increase in new businesses to Banna Avenue and other retailers continuing to make small improvements to their frontages with new and improved signage, which has made a massive difference to the street appeal and overall look and feel of the main street shopping strip.

Banna Avenue

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
257	32	7	8	Banna Avenue, Jondaryan, Crossing	8	Wakaden, Yambil, East Griffith	11

Yambil Street

Yambil Street is parallel to Banna Avenue and is divided by Jondaryan Avenue which separates the professional precinct from the multi-complex shopping centres such as Griffin Plaza and Griffith Central.

On the northern end, the type of services you can expect include; financial services, accountants, solicitors, consultants, hair and beauty, surveyors, furniture and office, hardware and department stores such as The Area Builders, GB's Sports, accommodation, job network, conveyancers, real estate agents, health and government and community services.

The southern end of Yambil Street where Jondaryan Avenue bisects is the Griffith Fire Station, Griffith Central and Griffin Plaza. The street also backs onto Big W and Woolworths.

In 2015, Yambil Street had the largest number of new businesses (16) which was predominantly led by the two plazas Griffith Central and Griffin Plaza. Yambil Street is undergoing a metamorphosis with the sale of the old Mitre 10 Donaldson's building, paving the way for new tenants, and the sale of the large Anthony's Office Furniture also providing opportunities. There were slightly higher shop vacancies with minimal business movements in or out.

Yambil Street

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
169	13	3 Central	2	Banna Avenue			16

Wakaden Street

Wakaden Street is a diverse mix of service-type industries, agricultural, retail and construction, mixed with high-density and single-dwelling housing. In 2015 Wakaden Street had a slight decrease in vacant shopfronts, with minimal business movement. A number of business expansions and refurbishments such as Live Fit, Joss and Ferraro Foods has added to the appeal of Wakaden Street.

Wakaden Street

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
52	7	1 Blackwoods	1 Joss	Mooreville	1 SPK		1

Mooreville Industrial Area

The Mooreville Industrial Area is one of the oldest industrial estates in Griffith and is defined by a diverse mix of mechanical, irrigation, printing, trades, steel manufacturing and bulky goods and furniture.

This area has vastly improved since the audit commenced in 2012 with less than half of the shopfront vacancies recorded. There were dramatically more new businesses, an increase of businesses moving to this precinct and only two moving out for expansion purposes.

One of the major improvements is the expansion of Liftek, making a big difference to one of the largest buildings at the very entrance of this estate. This immediately gives an impression that the estate is still very relevant to the people of Griffith and a great opportunity for others to establish themselves in this industrial estate, as there are small frontages and large premises in which to base themselves. A new vet and puppy training school has been established, bringing new clientele to the area.

Mooreville Industrial Estate

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
111	12	1	5	Wakaden, Benerembah	2	Wakaden	8

Wickhams Hill Industrial Area

The longest-standing industrial centre in Griffith, the Wickhams Hill Industrial Area is predominantly agricultural machinery, grain services, engineering, packaging, landscaping and concreting and other various industrial users such as a winery, pallets and commercial waste management services.

Wickhams Hill is a very stable industrial precinct with very few changes in the last 2 years. There has been a slight increase in shopfront vacancies and movements.

Wickhams Hill

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
73	5	0	3	Yoogali			2

Battista Estate

Battista Estate is one of the newer industrial areas with frontage to major arterial roads and heavy vehicle user routes.

This area houses irrigation, construction, self-store and security services. In 2015 there are very few changes with one new business co-locating to the area. There still remains a few vacant land parcels, which would be an attractive lure for businesses wishing to establish or relocate to this area.

Battista Estate

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
18	2	2			1		1

Benerembah Street

Benerembah Street is the centre of town and part of Walter Burley Griffin's vision was to house local government here. Typically this area is housed on a wide circular road which accommodates a diverse mix of businesses from upholstery, office printer cartridges, hair and beauty, tile shop, professional services, engineering, civil construction and architectural as well as a supermarket and training services.

This area is has changed substantially in the last 12 months with Darawan International Supermarket moving, Liftek moving to a larger premises and two significant businesses closing which has increased the number of vacant shopfronts in this area.

Benerembah Street

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
33	5	2			2 Darawan, Liftek	Kooyoo, Mooreville	

Yenda / Bilbul / Beelbanger

The villages of Yenda, Bilbul and Beelbanger combined are vitally important villages to the Griffith economy in terms of the businesses that are represented and the scale of large industries that reside there.

Yenda is the largest town apart from Griffith and has one of the largest employers: Casella Family Brands. This area has a number of wineries and Yenda is almost self-sufficient with its own independent supermarket, pub, chemist and agricultural merchandise stores. The establishment of Australian Beer Company last year has been an important addition to the village with Yenda becoming a hub for food and beverage manufacturing. The company has been increasing production and its workforce and has a bright future ahead.

There is opportunity to attract further manufacturers to the village in the future at a number of sites.

The 2015 Audit showed little change for businesses in Yenda, apart from the closure of two major businesses – Villagio Pizza and Bronzewing Cartridges.

Yenda / Bilbul / Beelbanger

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
23	5	2					

Hanwood

Hanwood is a village south west of Griffith on the main route into town on the Kidman Way from Melbourne. Hanwood is one of the largest villages and features a diverse mix of large industries from chicken processing (largest employer), juicing, cherry / orange packing houses and wineries, agricultural mechanical repairs and a service station.

The 2015 Audit showed very few change since last year as this area is fairly stable, being one of the busiest entrances to Griffith. Shift workers and locals consistently support the local businesses.

Hanwood

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
28	3	1					1

Hometown

Hometown is a bulky goods centre located on the outskirts of Griffith on the Kidman Way. The centre features Bunnings, local 4 Cinema City Complex and Star City Ten Pin Bowling, Lincraft, Repco, Fantastic Furniture and Spotlight. There was a change of owner in 2014.

Hometown

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
8	2						1

Willandra Avenue / Gateway Mega centre (including Harvey Norman)

Willandra Avenue is made up of a mix of businesses such as a tyre retailer, signage, caravan and boating (leisure) and a seed cleaning business. This strip also incorporates the Gateway Mega centre which is fully tenanted. Harvey Norman, Supercheap, Knock on Wood, Anytime Fitness and BCF compliment the mix of leisure and lifestyle businesses.

There were very few changes this year with one business moving into this area.

Willandra Avenue (including the Gateway Mega centre – Harvey Norman)

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
17	2		1 SJR Industries	Yoogali			

Driver

The Driver shopping centre services the Collina and East Griffith areas and is an important centre for this reason. This centre is underpinned by an independent Driver IGA, restaurant, bakery, fitness and childcare centres, hairdresser, beautician and GP. The number of businesses, 15, has not changed - there were no movements or closures in the past 12 months.

Driver

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
15							

Palla Street

Palla Street is a residential area of Griffith, which is seeing a lot more commercial blend, particularly accountancy, dental and massage. This could be due to the wide, tree-lined streets and older style homes which make great offices. The number of business has increased in 2015 to allow for ad-hoc businesses with a shopfront in the Lake Wyangan area to come under this precinct, including Ortella Street with new business Pea in a Pod.

Palla / North Griffith

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
13					1		1

East Griffith

Despite its close proximity to town, the East Griffith shopping centre has had a resurgence in the past 12 months. It is an important shopping centre for its area, which houses many aged residents, two major schools and lots of passing trade which frequent it. The centre contains a newsagency, bakery, post office, dental clinic, hairdresser, childcare services offices, a fitness centre and takeaway.

In the past 12 months RMA has moved from Banna Avenue and Fresh has closed.

East Griffith

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
11		1 Fresh	1 RMA	BA			

Airport Precinct

Whilst many might not consider the airport a bustle of economic activity, there are many businesses who reside here that contribute enormously to the local economy.

This area is underdeveloped in so far as there is potential to attract new aviation related industries and services to this area.

There have been no changes to this area in the past 12 months.

Airport Precinct

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
9							

Yoogali

Yoogali is a village south of Griffith on the entrance into Griffith from Leeton. Yoogali has undergone a number of changes in the past 12 months with a new café establishing itself and some movement out of the area.

Yoogali

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
6	1	1 Focal IT	2 Unique hair, TDT Tiling	BA, Merrigal	1 SJR Industries	Willandra	1 Café Yoogali

Murray Road Yoogali

Murray Road is west of Yoogali and is predominantly a rural business and industry precinct, although there is scope for more industrial businesses to co-locate near Murrumbidgee Irrigation and Essential Energy.

Murray Road

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
8		1 CSIRO					

Hillston Road / Tharbogang

This is a growing area for larger businesses and industries located on the northern entrance to Griffith on the Kidman Way.

This area is home to the Griffith Livestock Centre, Real Juice, Yenda Prods, Warburn Estate and Bruno Altin Co and Steel Tech as well as orange packing houses.

Tharbogang / Hillston Road / West Griffith

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
24	1	1 Summertime	1 Mahon Construction		Malcolm's Rest	BA	1 Coro rest

Ulong Street

Ulong Street is a side street joining the main street, Banna Avenue, with the professional sector in Yambil Street. Ulong Street is home to community services, cafes and restaurants, accommodation, solicitors and accountants, lending brokers, hairdresser, clothing, giftware, car yard and homewares.

A new business was established in the last 12 months - Par's Thai Massage.

Ulong Street

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
19							1 Par's Thai

Kooyoo Street

Kooyoo Street is another of Griffith's side streets, linking Banna Avenue, with Railway Street and Yambil Streets. In the last 12 months there has been some movement with the Darawan International Grocery store moving in from Benerembah Street and HR Massage Parlour opening.

Kooyoo Street

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
13	1		2 Darawan Int, Australian Contracting Solutions				1 HR Massage

Mackay Avenue

A major entrance into the City of Griffith, Mackay Avenue has a mixture of nurseries, freight and logistics, accommodation and car yards. There are no changes to this precinct in the last 12 months apart from Bidgee Gallery.

Mackay Avenue

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
12	2						1

Jondaryan Avenue

Lined by date palm trees, this major thoroughfare into the City of Griffith has been included independently of Wickhams Hill. This strip has a mixture of accommodation, fast food, services and agricultural and hardware supplies. With two prominent building retail businesses relocating from Yambil Street, there are very few vacancies along this busy stretch of road.

Jondaryan Avenue

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
22	3		2 Area Plumbing, Inspirations Paint	Yambil	Metzerplas	Banna Avenue	

Railway /Olympic Street

Often referred to as the back street of Griffith, Railway /Olympic Street is parallel to Banna Avenue, which houses the main shopping precinct. It is identifiable by large concrete and corrugated iron sheds in one section and a mixture of backend shops and flats. There is no change to this precinct in 2015.

Railway / Olympic Street

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
14	5						

Favell Street

Favell Street is a small cul de sac off Jondaryan Avenue, which houses agricultural, smash repairs, forklift business (new) and lighting wholesalers.

Favell Street

Number of Businesses	Vacant Shops	Closed	Moved in or within	From Where	Moved Out	To Where	New
6							

Summary

The results show an increased growth in new businesses, with the highest number of new businesses in Griffith in 4 years at 47, the best Griffith has seen since the survey commenced. The survey also shows an increase in bricks and mortar businesses, the largest number since the survey began.

There is an increased number of shop-front vacancies primarily in the retail sector which influences how people view the vibrancy of a shopping district.

Across the city of Griffith there are 100 vacant buildings. In 2014 this number was 48, in 2013 it was 73 and in 2012 it was 98. This shows a cumulative effect and has actually skewed the data in providing an accurate yearly snapshot of shopfront vacancies in the past 12 months. Only 31 vacant shopfronts were tallied in the past 12 months across the local government area, 8 in Banna Avenue and 7 in Yambil Street.

Vacancies across Australia seem to be a systemic trend in how retail trade as an industry is under strain and does not seem to be isolated only to Griffith. In fact, most rural cities and many suburbs in Sydney including Manly, Parramatta, Adelaide and the North Coast also struggle with this issue. It is clear that the retail sector in Griffith is feeling the effects of changing consumer behaviour. That more retailers are relocating from Banna Avenue to other locations in Griffith may be an indication of changes to the typical retail business model.

Some precincts are very stable and have had no change or very little change in the past 12 months. The main street (Banna Avenue) and Yambil Street continue to change with the landscape and this is particularly noticeable when you conduct a Google Earth street view search. Change can be viewed as bad by some, however change can bring new vibrancy and a new vibe to the different areas in the Local Government Area.

This year's audit highlighted an increase in veterinarian services as well as massage and wellbeing businesses. New ownership in accommodation services and the soon- to- be constructed serviced apartments in Railway Street will inject more activity and beautification into this sector, which will benefit the overall attractiveness to host events and bid for increased conferences.

Summary table 2015 compared with previous years

	Summary 2015	Summary 2014	Summary 2013	Summary 2012
New Business	47	44	30	37
Closed	23	10	29	48
Vacant buildings	100	48	73	98
Movement	47	14	30	86
Total bricks and mortar	959	943	977	748

Conclusion

Council will continue to monitor business activity across the City. Changes to Council's Economic Development policies and incentives are now in place. Whilst these have been welcomed by the development sector, it is unknown how these will boost retail confidence.

However there is activity in all precincts and villages which is important, the 'health' of Banna Avenue is a significant indicator of local economic performance. Council is progressing with a review of its CBD Strategy in part to increase activity in the City Centre. Yambil Street is emerging as an important compliment to Banna Avenue.