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Rockhampton Regional Industry Profile:

identifying opportunities for innovation clustering

Research report to Capricorn Enterprise

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Centre for
Environmental
MANAGEMENT

Executive summary

Regional business and industry are critical players in regional innovation systems, yet there is currently no reliable way to assess the actual makeup of these entities in regional Australia. This project set out to provide a comprehensive and current business audit for the Rockhampton region, and then to use that information to identify the potential for innovation relationships between SMEs, the regional university, and various other regional service providers. In particular, the project was focussed on discovering ways to more strategically engage with local industry to facilitate cluster formation, develop R&D collaborations, access business expertise, and promote the region's strengths and advantages. This report describes methodologies that can be used to collate and explore information about regional businesses and their activities. It also highlights some of the challenges and opportunities that regions face in generating an evidence-base about their local business profile. Finally, it touches on the implications of this research in terms of constructing regional advantage through economic development activities, and in particular, through partnering with SMEs for innovation.

In undertaking this research, it quickly became evident that there is an exceptionally low level of detail to describe businesses and/or business activity at the regional/local government area level. The availability and quality of specific business-level information as outlined in the project brief (e.g. business name, address, contact and industry) fell well below expectations. Publicly available information is limited to that from central registers (such as the Australian Taxation Office and Australian Security and Investment Commission); purchased datasets have patchy, poor coverage; and privacy constraints make it very difficult to understand what linkages have already been made with clients of federal and state government service providers. Subsequently, a range of other sources were used in an attempt to develop a more comprehensive picture of the nature of business activity in the region, as well as the engagement with businesses that is already underway. The material supplied in this report can thus act as a reference source when considering new economic development activities in the region.

Despite these challenges, a database of the Rockhampton Regional Industry Profile has been constructed with some 19,313 entries. Coverage of the database varies with respect to different business parameters, ranging from 100% coverage (for example, entity names and types) to as low as 2% (for example, available email contacts). Businesses registered to the postcodes 4700-4703 represent some 86% of those on the database; whilst some 793 businesses appear despite being administered from a postcode outside of the Rockhampton region. For the latter, Capella, Brisbane and Mackay were the top centres from which businesses were sourced. Almost half of the records were individual/sole traders, with only 20% being private companies. The breakdown of businesses by industry division proved challenging, with manual coding performed on only a portion of the dataset, and some anomalies being evident when these data were compared with those supplied by the Australian Bureau of Statistics.

The report also carries a range of information in other areas, including the number and valuation of local government rateable businesses, regional business growth statistics, industry output analysis, finance and investment patterns, innovation activity, export statistics, and involvement in business

membership groups as well as in various government support programs. Some data about resource use (energy, waste) are also available.

A case study focus was also used to prepare in-depth information about three areas of the Rockhampton economy, selected because of current interest and activity by regional stakeholders: transport, tourism and the digital economy (information, communications and technology).

Five key challenges were identified as a result of this attempt to profile the Rockhampton Regional industry base:

1. Genuine lack of data at the regional level

2. Tight privacy-protection arrangements for individual businesses

3. Challenges in accurate industry coding (both at the division and 4-digit levels)

4. Difficulties in understanding and/or interpreting particular statistics and data; and

5. Properly accounting for 'exogenous' businesses – those that are administered outside of the region's postcode range, but which may still play an important role in regional business activity.

A range of critical information gaps are also described in the report, in the areas of economy, finance and investment; employment and skilling; resource use; information technology; regulatory and licencing profiles; and research and development activities. Some of these issues are revisited in the response to the ABS' consultation paper on Essential Statistics for Australia (provided in Appendix D).

Some of the original objectives of this research project were not able to be delivered. For example, geo-spatial mapping was initially thought to be of use in helping to guide the formation of clusters based on physical attributes, but this could not be reasonably done from the compiled dataset. On the other hand, some of this functionality is possible on-request from commercial providers (e.g. Google Places).

In light of the dataset that is now available, and the challenges that have been identified in identifying and compiling this dataset, recommendations for future work in guiding economic development activities with businesses in the Rockhampton region might include:

- Use of the RRIP database to identify particular businesses that may suit inclusion in clustering activities, and employ a range of search methods to develop a full and complete listing

- Acknowledgement that many of the listed entries represent ABNs that have been obtained 'for convenience', and which may not necessarily be interested in participating in collaborative initiatives

- Consider methods for identifying the range of businesses that may be administered out of the desired postcode range region, but could play a key role within the region (particularly for highly-mobile sectors).

Lobbying for change in the collection and reporting of regional-level business data should also be a key activity for those regions wishing to have a strong evidence-base on which to build regional economic development initiatives.

This research report provides key figures and statistics collected with respect to business activity in the Rockhampton Region, and should be read in conjunction with the accompanying Rockhampton Regional Industry database, which is supplied separately (in Excel database format). It should be noted that both this report and the accompanying industry database is accurate as at 30 July 2012. A strategy to monitor and incorporate updates to this information will be necessary to maintain the database over time.

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Abbreviations

ABN	Australian Business Number
ABS	Australian Bureau of Statistics
ACN	Australian Company Number
AICD	Australian Institute of Company Directors
AoD	Australia on Disc
APRA	Australian Prudential Regulatory Authority
ASIC	Australian Securities and Investment Commission
AVCAL	Australian Private Equity and Venture Capital Association Limited
BRG	Business Research Group
CCIQ	Chamber of Commerce and Industry Queensland
CE	Capricorn Enterprise
CEM	Centre for Environmental Management
CINS	Centre for Intelligent and Networked Systems
CQLGA	Central Queensland Local Government Association
CQUniversity	Central Queensland University
DEEDI	Department of Employment, Economic Development and Innovation
DGR	Deductible Gift Recipient Status
IRC	Innovative Regions Centre (Enterprise Connect)
ICN	Industry Capability Network
IRIS	Institute for Resource Industries and Sustainability
ISHHR	Institute for Health and Social Science Research
GIA	Gracemere Industrial Area
GST	Goods and Services Tax
Health CRN	Health Collaborative Research Network
RDA	Regional Development Australia
RDAFCW	Regional Development Australia Fitzroy and Central West
RRC	Rockhampton Regional Council
RRIL	Rockhampton Regional Industry Link program
RRIP	Rockhampton Regional Industry Profiling Database

1.   Introduction

Recent business and industry forums and other activities in the Rockhampton region have confirmed both the need and the opportunity to better identify and link regional businesses with each other, as well as with key regional organisations. For example, these include the work done during the CQ Innovation Prospectus; industry workshops, consultations and information sessions held by the CQUniversity Institute for Resource Industries and Sustainability and other university areas; industry dialogue and workshops held by Capricorn Enterprise; and client information and industry intelligence gathered by DEEDI officers and the AIC Innovation Coach.

Much of the above-mentioned consultation and engagement has been with sub-sets or individual representatives of various industry groupings in the region. Unfortunately, these relationships are not usually developed in any strategic sense; rather, they are organic relationships that occur through personal or professional contact and affiliation. Beyond traditional macro-economic datasets, there is currently no reliable way to assess the actual makeup of particular industries or sectors at the regional level; nor are there readily-available details about innovation performance or the likelihood of participating in (or benefiting from) future business development activities. This is a considerable barrier in attempting to identify and establish new models for business assistance, develop targeted collaborations, and/or facilitate the growth of emerging industries or cluster development. This situation can also encourage over-servicing of identified, participant companies; potentially at the expense of lost opportunities with others. Most importantly, it is a limitation on the economic potential of the region; for unless the region's true business makeup is understood, planning and service delivery will inevitably be sub-optimal.

In considering the above, this project set out to provide a comprehensive and current business audit for the Rockhampton Region, for use by a range of stakeholders. The aim of was to map, to a level of > 80%, the business profile of the Rockhampton region, and to use this information to identify the potential for innovation clusters, driven by collaboration between business and industry and key regional organisations.

2.   Approach and methodology

2.1 Desktop review

The project focus was to collect relevant information about business demographics, business activity, and regional economic development indicators in the Rockhampton region. For the purposes of this study, the Rockhampton region was defined as:

- The postcode range 4698-4706 plus 4710, 4711 and 4714;

- Statistical Area Level 2 (under the Australian Geographical Standard); and/or

- The boundaries of the Rockhampton Regional Council local government area.

Where possible, data was compiled for the most recent activities only (for example, last three to five years).   A summary of the key organisations / data sources approached during the project is provided in Appendix A.

2.2 Database development

Available information from the ABN lookup tool, D&B data services (including Company360) and AoD postcode search was collated into a single industry database for the Rockhampton region. The database was then constructed by:

- importing all available information for the desired postcode range; removing inactive ABNs[1] (refer to Table 1); and removing irrelevant entity types (refer to Table 4)[1];

- linking source data by common identifiers, such as ABN or business/trading name, to achieve a collated data set for each unique entity;

- removing duplicates (by manual search); and

- (for the AoD data only) populating industry code at the division level (by manual search and entry, including re-coding of ANZSIC 4-digits provided under the old 1993 classification).

Further manual searches were also conducted on selected, publicly available business directories. These uncovered a number of other businesses (approximately 809) who are actively advertising in the Rockhampton region, although they are not registered to the region for taxation or other administrative purposes. These have been added to the database given that these businesses may play an important role in the regional economy, and could potentially be invited to join regional clustering initiatives.

Table 1   **Total number of business entities in the Rockhampton region, by postcode. Information sourced from the Australian Tax Office 'ABN Lookup Tool'.**

Postcode	ABN Records	Inactive	Active^	% of total active
4698	1	0	1	0.00
4699	263	72	191	0.69
4700	7906	2242	5664	20.33
4701	10366	2907	7459	26.78
4702	9381	2486	6895	24.75
4703	7579	1959	5620	20.17
4704	113	28	85	0.31
4705	336	82	254	0.91
4706	29	10	19	0.07
4710	1255	329	926	3.32
4711	373	86	287	1.03
4714	672	216	456	1.64
Totals	38274	10417	27857	100%

^For the purposes of the Rockhampton business database, only active entities were downloaded.

Table 2   **Breakdown of entity types for active ABNs in the Rockhampton region.** Information sourced from the Australian Tax Office 'ABN Lookup Tool'.

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[1] Some entries still appear on the master database with 'cancelled ABN' status, or with entity types outside of the target range. These refer to businesses who are still actively advertising in the region, and who therefore are still relevant from the perspective of identifying possible cluster participants.

Type	Total number	Percent of total (%)
APRA Regulated Public Offer Fund	0	0.000
ATO Regulated Self-Managed Superannuation Fund*	1363	na
Australian Private Company	3468	14.808
Australian Public Company	72	0.307
Co-operative	9	0.038
Corporate Unit Trust*	3	na
Deceased Estate*	50	na
Discretionary Investment Trust*	667	na
Discretionary Services Management Trust*	90	na
Discretionary Trading Trust*	993	na
Family Partnership	3881	16.572
Fixed Trust*	24	na
Fixed Unit Trust*	185	na
Hybrid Trust*	26	na
Individual/Sole Trader	13926	59.465
Limited Partnership	8	0.034
Local Government Entity	1	0.004
Non-Regulated Superannuation Fund*	2	na
Other Incorporated Entity	622	2.656
Other Partnership	950	4.057
Other trust*	890	na
Other Unincorporated Entity*	422	1.802
Small APRA Regulated Fund	0	0.000
State Government Entity	59	0.252
State Government Statutory Authority	1	0.004
Strata-title*	143	na
Unlisted Public Unit Trust*	1	na
Total (all entities)	27856	
Total (relevant entities only)	23419	100.0

Asterisked (*) entities were removed from all further summaries and analyses, as they were not considered relevant for mapping of innovation clustering potential. na=not applicable.

The resulting RRIP database is now available as an Excel spreadsheet. For ease of navigation, the spreadsheet has the following tabs:

- The master database: a combined listing of all 19,313 records, which reflects all businesses that were identified as being administered from, or trading in, the Rockhampton region. All entries are included in this master listing (regardless of the completeness of each entry);

- Summary statistics describing the master database;

- The 'AoD+' data: this is an extraction of information from a commercial supplier[2], comprising nearly 5,899 businesses who are actively advertising in the Rockhampton region. That dataset has been further supplemented by manual addition of revised industry codes (division level, and 4-digit subdivision level). ABNs were also able to be sourced for 3,867 businesses, hence these also appear in the master listing. For the remaining 2,027 entries, it is likely that many of these also appear in the master listing, but under slight variations of trading or entity name[3];

- An extract of companies that are currently listed on the Industry Capability Network (ICN) database, as trading in the Rockhampton region. This comprises some 302 businesses, including some 35 entities that are headquartered outside of the region;

- Then follows six sheets that provide raw and summary datasets for each of the three 'case study' industries (transport, tourism and ICT) (see section 5).

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[2] Australia on Disc

[3] These variations frustrate the process of manual matching of ABNs. All entries have been checked line-by-line. However, unless it was clear that the trading name was an appropriate match for the quoted ABN, the entries were not included, as it is better to have empty entries, rather than incorrect ones. The manual matching process was guided by trading name, registered postcode, and whether the ABN was in active or cancelled.

3.   Key results: regional industry profiling

3.1 Database summary

The Rockhampton Regional Industry Profiling (RRIP) database has been compiled from a range of sources. The master database contains a total of 19,313 records with information available for up to 17 fields. A summary of the database coverage for the key parameters is provided in Table 3. A number of additional fields are also provided in the database, including some added as part of the focus study on priority sectors (see section 5 of this report).

Duplication of records was a significant problem in compiling the database, with even minor changes in entity names resulting in an entirely new record being generated (e.g. 'ABC Cleaning' as opposed to A.B.C. cleaning').

It also should be noted that some areas of the database (especially the AoD+ tab) will carry multiple entries for some ABN/ACN numbers, or for the same business name. These reflect businesses with more than one premises (and/or point of contact) in the region; or, in some instances, examples where businesses have multiple activities and are advertising under more than one business category (ANZSIC code).

Table 3   Summary of fields and level of coverage for the RRIP database, as at 30 July 2012.

Field	Number of records	Percentage of total (%)
ABN	19,290	99.9
ACN	3,980	20.6
Entity name	19,313	100
Trading name	14,897	77.1
Postcode	19,313	100
Entity type	19,313	100
GST Registration	19,313	100
Registration date	*8,432*	*43.7*
Not GST registered	*8,846*	*45.8*
ABN Status	19,313	100
Active	*19,052*	*98.6*
Cancelled	*261*	*1.4*
Contact address	2,957	15.3
Contact phone	3,331	17.3
Contact email	449	2.3
Website	367	1.9
Industry SIC^		
In master list	2,066	10.7
In AOD+ data	3,581	-
ANZSIC division ^^		
In master list	3,308	17.1
In AOD+ data	5,899	-
ANZSIC (four-digit code)		
In master list	2,642	13.7
In AOD+ data	4,641	-
AOD Category~		
In master list	3,309	17.1
In AOD+ data	5,899	-
<u>**MASTER LISTING**</u>	19,313	100
<u>**AoD+ LISTING**</u>	5,899	-
(with approx. 3,867 of these appearing in the master)		

~ Business category, as supplied by Australia on Disc (self-described by business owners); ^SIC = standard industry codes as used by Dun and Bradstreet, refer to Appendix B for classifications; ^^ ANSZIC coding as per the 2006 hierarchy, refer to Appendix A for classifications.

3.2 Source locations for of entities

Within the master listing, almost 96% of businesses are sourced from the Rockhampton region postcode range. Within these, the highest densities of ABNs are registered to postcodes 4700-4703, which together represent 86% of all business presences.   However, there are also an additional 793 businesses appearing on the list that are registered to postcodes outside the region[4]. Of these, there are twelve centres from which >10 businesses are sourced (Table 4).

Table 4   **Postcode details for business entities located outside of the the Rockhampton region, but which continue to advertise and/or operate within the region.**

Postcode	Centre	Number of businesses
4723	Capella	40
4000/01	Brisbane	39
4740	Mackay	28
4670	Bundaberg	22
4680	Gladstone	17
2000	Sydney	14
4720	Emerald	14
4870	Cairns	13
4575	Kawana Waters (Sunshine Coast)	11
4350	Toowoomba	10
4551	Caloundra (Sunshine Coast)	10
4558	Maroochydore (Sunshine Coast)	10
4xxx	Other Queensland	384
2xxx	Other New South Wales	91
3xxx	Other Victoria	58
6xxx	Other Western Australia	18
5xxx	Other South Australia	13
7xxx	Other Tasmania	2
	Total	795

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[4] Note: this information was sourced from a range of publicly available directories and does not reflect the full complement of likely businesses.

3.3 Types of entities

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Some 47% of the recorded businesses are sole traders, with family partnerships and private companies representing a further 21% and 20% of company types, respectively.

ENTITY TYPE	Number	Percent (%)
ATO Regulated Self-Managed Superannuation Fund	2	0.01%
Australian Private Company	3856	19.97%
Australian Public Company	121	0.63%
Commonwealth Government Entity	1	0.01%
Co-operative	10	0.05%
Discretionary Investment Trust	6	0.03%
Discretionary Services Management Trust	6	0.03%
Discretionary Trading Trust	146	0.76%
Family Partnership	4049	20.97%
Fixed Trust	1	0.01%
Fixed Unit Trust	23	0.12%
Hybrid Trust	3	0.02%
Individual/Sole Trader	9134	47.29%
Limited Partnership	8	0.04%
Local Government Entity	4	0.02%
Other Incorporated Entity	645	3.34%
Other Partnership	995	5.15%
Other trust	182	0.94%
Other Unincorporated Entity	52	0.27%
State Government Entity	66	0.34%
State Government Statutory Authority	1	0.01%
Strata-title	2	0.01%
Grand Total	*19313*	*100.00%*

3.4 Breakdown by industry division

Coding for ANZIC industry division was performed only on the AoD+ dataset, due to time constraints. However, information about the industry profile of the Rockhampton region is also available from the Australian Bureau of Statistics. For example, Table 5 indicates the numbers of business operating in 17 industry divisions, from a regional total of 7,825, using the latest available information from the ABS. However, when the information in this table is compared with the entries contained in the AoD+ listing (total 5,899 businesses), some anomalies are present. The greatest difference is seen in the 'retail trade' division (G), with the AoD data having almost 1,000 more businesses coded to this division than the ABS data (Figure 1). In contrast, the ABS data carried far more businesses in the agricultural, financial and construction sectors than did the AoD listing. These differences can be explained partly by the AoD dataset having almost 2,000 less businesses overall than the ABS dataset; as well as the manual coding process undertaken during data handling for the AoD data[5].
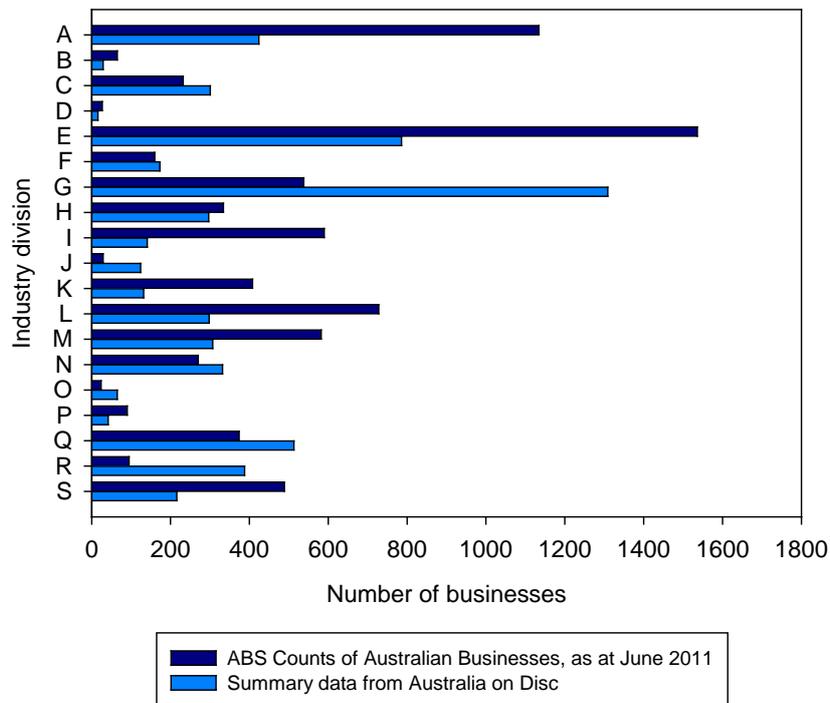
Figure 1   Business counts by industry; comparison across ABS data and AoD data.

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[5] The coding used by the ABS relies on self-description by businesses.

Table 5 **Counts of Businesses by industry division by employment size ranges, for Rockhampton^, as at June 2011.** Source: collated from ABS 8165.0 - Counts of Australian Businesses, including Entries and Exits, June 2007 - June 2011

Industry	Non - employing	1-4	5-19	20-199	200+	Total	Total (%)
A Agriculture, Forestry and Fishing	947	121	57	9	0	1134	14.5
B Mining	32	9	18	6	0	65	0.8
C Manufacturing	115	53	35	29	0	232	3.0
D Electricity, Gas, Water and Waste Services	9	15	3	0	0	27	0.3
E Construction	840	434	213	49	0	1536	19.6
F Wholesale Trade	76	35	34	15	0	160	2.0
G Retail Trade	190	137	146	65	0	538	6.9
H Accommodation and Food Services	94	68	102	67	3	334	4.3
I Transport, Postal and Warehousing	366	164	48	9	3	590	7.5
J Information Media and Telecommunications	17	9	3	0	0	29	0.4
K Financial and Insurance Services	315	65	25	3	0	408	5.2
L Rental, Hiring and Real Estate Services	586	80	41	21	0	728	9.3
M Professional, Scientific and Technical Services	292	174	92	24	0	582	7.4
N Administrative and Support Services	133	69	47	21	0	270	3.5
Not Classified 1	98	19	3	0	0	120	1.5
O Public Administration and Safety	12	6	6	0	0	24	0.3
P Education and Training	46	32	9	3	0	90	1.2
Q Health Care and Social Assistance	183	100	61	30	0	374	4.8
R Arts and Recreation Services	53	21	9	12	0	95	1.2
S Other Services	204	177	99	9	0	489	6.2
Total (All sectors)	4608	1788	1051	372	6	7825	100.0
Percentage total (all sectors)	58.9	22.8	13.4	4.8	0.1		

^ Statistical Level 3 (Code 30803) in the Australian Statistical Geography Standard

3.5 Local government rateable businesses information

Summary information was obtained from Rockhampton Regional Council regarding properties in the general rating category 1 (=commercial and light industry) (Table 6). This indicates that the most numerous land use types include single shops, offices and light industrial premises.

Table 6 **Breakdown of properties in rating Category 1 (commercial and light industry) for Rockhampton Regional Council, as at June 2012. (Source: RRC, by request).**

Land Use	Land Use Description	No of properties	Total Valuation ($)
7	Guest House/Private Hotel	12	3,834,000
10	Combined Multi Dwg & Shops	6	894,700
11	Shop - Single	208	50,316,900
12	Shops - Shopping Group (more than 6)	86	19,728,000
13	Shopping Group (2 to 6)	59	25,337,500
14	Shops - Main Retail	82	36,784,500
15	Shops - Secondary Retail	12	7,685,000
16	Drive In Shopping Centres	5	5,989,000
17	Restaurant	30	14,115,500
18	Special Tourist Attraction	13	3,613,300
20	Marina	4	5,122,306
22	Car Park	8	2,343,500
23	Retail Warehouse	38	20,688,500
24	Sales Area Outdoor	36	24,545,192
25	Offices	312	92,554,700
26	Funeral Parlours	5	1,127,500
27	Hospitals	4	4,870,000
28	Warehouses and Bulk Stores	56	20,322,932
29	Transport Terminal	27	13,701,500
30	Service Station	62	29,438,100
31	Oil Depots	1	310,000
33	Builders/Contractors Yard	9	5,283,400
34	Cold Stores - Iceworks	4	1,277,500
35	General Industry	40	13,617,000
36	Light Industry	437	142,187,268
38	Advertising Hoarding	1	7,500
39	Harbour Industries	5	1,602,000
41	Child Care	26	7,767,000
42	Hotel/Tavern	54	35,785,200
43	Motel	48	40,291,000
44	Nurseries	19	4,299,500
45	Theatres and Cinemas	1	410,000
47	Licensed Clubs	17	10,643,000
48	Sports Clubs/Facilities	26	15,601,000
49	Caravan Parks	19	21,771,500
51	Religious	1	79,000
58	Educational	1	385,000
	TOTAL	**1774**	**684,329,498**

Additional information is also provided in Table 7 regarding sewerage and waste connections. These data also indicate that approximately one in four category one premises have owners that are not resident within the region, which may be important in considering their likelihood to become involved in clustering activities.

Table 7   Summary information for rating category 1 properties (commercial and light industry) for Rockhampton Regional Council, as at June 2012. (Source: RRC, by request).

Total number category 1 properties	1,774
Total number of sewerage connections (category 1 properties)	9,478
Total number of waste bins provided (to category 1 properties)	4,012
Total number of recycling bins provided (to category 1 properties)	1,534
Outside-owners of category 1 properties^	422 (24%)

^ The number of category 1 properties for which rates notices are issued to a mailing address outside of the RRC postcode range.

3.6 Regional business growth 2010-11

Comparison of business count data for Rockhampton between June 2010 and June 2011 show an overall gain of just 17 businesses in the region – representing annual growth of just 0.2% from 2010 (Table 8). Key industry sectors underpinning the raw increases were rental, hiring and real estate services; health care and social assistance; and professional, scientific and technical services. However, in percentage terms, the growth industries were mining; electricity, gas, water and waste; and public administration. Conversely, the highest raw losses were in retail trade, construction and manufacturing, with the greatest percentage losses in information media and telecommunications; education and training, and unclassified sectors.

In terms of business size, large businesses (employing greater than 200+ staff) suffered a 60% decline, decreasing from 15 businesses to only 9 businesses. The only cohort to record growth was in the SMEs of 20-19 employees, which increased by 9.6% (some 92 businesses).

Table 9 provides a breakdown of businesses counts by suburb, and indicates that almost 1,400 businesses operate from Yeppoon (according to ABS data). The suburbs of The Range-Allenstown, North Rockhampton and Rockhampton city each have more than 500 registered businesses. Whilst Mt Morgan has less than 100 (Table 9). However, the data in the table also need careful interpretation: for example, only six businesses are listed with employee counts of 200+, with these being located in Yeppoon and Parkhurst-Kawana. Whilst this agrees with the overall tally in Table 5, it does not appear to include large employers such as Rockhampton Regional Council (=Rockhampton city); Stanwell Power Station (=Rockhampton city); nor the two meat processing operations in Rockhampton (=Lakes Creek, Nerimbera). Possibly, this might result from the company ABNs being registered elsewhere.

Table 8   **Change in businesses by industry division by employment size ranges, for Rockhampton^, between June 2010 and 2011.** Source: collated from ABS 8165.0 - Counts of Australian Businesses, including Entries and Exits, June 2007 - June 2011

Industry	Non - employing	1-4	5-19	20-199	200+	Total change	% change (on 2010)
A Agriculture, Forestry and Fishing	-11	-4	19	-15	0	-11	-1.0
B Mining	11	-8	9	3	-3	12	22.6
C Manufacturing	0	5	-17	-1	0	-13	-5.3
D Electricity, Gas, Water and Waste Services	-3	9	-3	0	0	3	12.5
E Construction	-19	-13	29	-14	0	-17	-1.1
F Wholesale Trade	10	-9	4	-6	0	-1	-0.6
G Retail Trade	-30	-19	10	14	-3	-28	-4.9
H Accommodation and Food Services	16	-33	15	16	-3	11	3.4
I Transport, Postal and Warehousing	-22	17	11	-12	3	-3	-0.5
J Information Media and Telecommunications	-12	9	-3	0	0	-6	-17.1
K Financial and Insurance Services	4	-18	5	0	0	-9	-2.2
L Rental, Hiring and Real Estate Services	13	11	2	5	0	31	4.4
M Professional, Scientific and Technical Services	7	5	-1	2	0	13	2.3
N Administrative and Support Services	-8	4	11	3	0	10	3.8
Not Classified 1	-10	-1	0	0	0	-11	-8.4
O Public Administration and Safety	-9	6	6	0	0	3	14.3
P Education and Training	8	-4	-9	0	-3	-8	-8.2
Q Health Care and Social Assistance	20	-5	4	6	0	25	7.2
R Arts and Recreation Services	4	12	-6	-3	0	7	8.0
S Other Services	0	9	6	-6	0	9	1.9
Total change	-31	-27	92	-8	-9	17	0.2
% change (on 2010)	-0.67	-1.49	9.59	-2.11	-60.00	-0.67	

^ Statistical Level 3 (Code 30803) in the Australian Statistical Geography Standard

Table 9   Breakdown of business counts, by size, by Rockhampton subregional area^

Subregion	Non-employing	1-4	5-19	20-199	200+	Total	% of region
Berserker	243	124	79	40	0	486	6.2109
Bouldercombe	127	32	9	0	0	168	2.147
Emu Park	162	60	52	15	0	289	3.6933
Frenchville - Mount Archer	283	109	61	15	0	468	5.9808
Glenlee - Rockyview	175	80	35	3	0	293	3.7444
Gracemere	279	90	50	15	0	434	5.5463
Lakes Creek	108	34	18	9	0	169	2.1597
Mount Morgan	57	28	6	0	0	91	1.1629
Norman Gardens	223	90	45	6	0	364	4.6518
Park Avenue	162	84	55	27	0	328	4.1917
Parkhurst - Kawana	252	96	76	33	3	460	5.8786
Rockhampton - West	186	59	23	12	0	280	3.5783
Rockhampton City	336	179	176	77	0	768	9.8147
Rockhampton Region - East	167	55	33	6	0	261	3.3355
Rockhampton Region - North	423	135	51	12	0	621	7.9361
Rockhampton Region - West	292	53	24	6	0	375	4.7923
The Range - Allenstown	329	129	77	40	0	575	7.3482
Yeppoon	804	351	181	56	3	1395	17.827
Grand Total	4608	1788	1051	372	6	7825	100

^ Statistical Level 2 in the Australian Statistical Geography Standard

3.7 Industry output analysis

Work by Rolfe et al. 2010[6] explored the industry-based input and outputs linked with the minerals and energy resources sector in Queensland. Summary data for the Rockhampton LGA are provided in Table 10, and these indicate that the sectors with largest impacts include wholesale trade, mining, and transport. Meanwhile, the retail trade and electricity, gas, waste and water supply also experience more than $10 million in direct industry outputs from the resource sector.

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[6] Rolfe, J., R. Lawrence, D. Gregg, F. Morrish and G. Ivanova (2010) *Minerals and Energy Resources Sector in Queensland Economic Impact Study*, report prepared for the Queensland Resources Council, The EIDOS Institute, Brisbane.

Table 10 **Direct and indirect impacts on industry outputs in the Rockhampton Region (LGA).**
Source: adapted from Rolfe et al. 2010.

Industry	Direct industry output ($m)	Indirect industry output ($m)	Total industry output ($m)	Relative contribution (%)
A Agriculture, Forestry and Fishing	0	0.51	0.51	0.25
B Mining	31.495	6.344	37.838	18.32
C Manufacturing	0.557	14.127	14.684	7.11
D Electricity, Gas, Water and Waste Services	10.306	2.12	12.425	6.02
E Construction	0	2.232	2.232	1.08
F Wholesale Trade	60.749	2.44	63.189	30.59
G Retail Trade	11.904	1.571	13.476	6.52
H Accommodation and Food Services	0	1.124	1.124	0.54
I Transport, Postal and Warehousing	31.074	6.429	37.503	18.16
J Information Media and Telecommunications	0.032	1.792	1.824	0.88
K Financial and Insurance Services	0.757	2.2	2.957	1.43
L Rental, Hiring and Real Estate Services	1.09	8.069	9.159	4.43
M Professional, Scientific and Technical Services	0	8.347	8.347	4.04
N Administrative and Support Services	0	0.237	0.237	0.11
Not Classified	0	0.263	0.263	0.13
O Public Administration and Safety	0	0.068	0.068	0.03
P Education and Training	0	0.681	0.681	0.33
Q Health Care and Social Assistance	0	0.026	0.026	0.01
S Other Services	0	0.51	0.51	0.25
Total change	147.964	58.58	206.543	100

3.8 Regional finance and investment

Descriptive data about the regional banking services is available from the Australian Prudential Regulatory Authority (APRA), within the ADI[7] 'Points of Presence' workbook (issue 24 August 2011). First released in 2001, this dataset now provides for longitudinal information about the types of banking services, and how access to these has changed as regional centres grow.

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[7] Authorised Deposit-Taking Institutions, such as banks, building societies and credit unions.

Table 11 **Summary of regional banking institutions, postcodes 4700 – 4705, 4710 & 4711^ (Source: APRA (2011) - ADI[8] 'Points of Presence' workbook).** Institutions in bold have dedicated business centres in the region. Institutions limited to Bank@Post outlets are not listed.

Institution Name	Total access points across all service points
Australia and New Zealand Banking Group Limited	13
Bank of Queensland Limited	16
Bendigo and Adelaide Bank Limited	10
Commonwealth Bank of Australia	18
National Australia Bank	9
Rabobank Australia Limited	1
Rural Bank Limited	2
St.George Bank Limited	1
Suncorp-Metway Limited	16
Westpac Banking Corporation	6
Heritage Building Society Limited	2
The Rock Building Society Limited	16
Wide Bay Australia Ltd	6
Credit Union Australia Ltd	2
ECU Australia Ltd	3
Queensland Teachers' Credit Union Limited	2
Railways Credit Union Limited	1
The Capricornian Ltd	6

^ Postcodes 4698, 4699, 4706 and 4714 were not listed in the workbook, so they are assumed not to have banking presence.

With respect to business financing, no venture capital investments have been made under AusIndustry's venture capital programs since July 2008[9], for any business operating in the postcodes 4699 through 4706. AVCAL is the National Association for venture capital in Australia, and it reports that none of the participants in their Australian private equity and venture capital community have had direct investments in companies headquartered in Rockhampton[10]. However, AVCAL notes that Rockhampton could potentially observe spillover effects from private equity investments; for example, investment in national franchises may flow into the region where outlets for those stores exist.

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[8] Authorised Deposit-Taking Institutions, such as banks, building societies and credit unions.

[9] AusIndustry reviewed their databases for the Innovation Investment Fund (IIF), the Pooled Development Funds (PDF), the Early Stage Venture Capital Limited Partnerships (ESVCLP) and the Venture Capital Limited Partnerships (VCLP) Programs. The databases allowed whole of program review for IIF, VCLP and ESVCLP. With the PDF they went back to 1 July 2008.

[10] AVCAL, personal communication.

3.9 Innovation activity

3.9.1 Patent applications

The number of patent applications lodged by businesses in the Rockhampton region is relatively low, with only 1 applicant identified for 2011 (Table 12).

Table 12 **Number of standard complete patents (2006-2009) and standard and innovation patents for the Rockhampton LGA (2010-2011), by postcode.**

Postcode	2006	2007	2008	2009	2010^	2011^
4700	-	1	1	-	1	**2**
4701	na	na	na	na	3	**2**
4702	-	-	1	2	-	**2**
4703	-	-	-	-	1	1
4710	-	-	-	1	1	-

^Includes both standard and innovation patents. Source: by request to IP Australia, 2012.

3.9.2 Registration for the R&D tax concession

The most recent and complete dataset from Enterprise Connect notes that for 2009/10, 16 companies were registered for the R&D Tax Concession in the Rockhampton region, with the total value of R&D registered being $9.11 million. It was not possible to obtain further information about the businesses, source industries or nature of the R&D undertaken. Nevertheless, further information from AusIndustry indicates that the number of companies registered for the R&D Tax Concession remained the same across the 08/09 to the 09/10 financial years. However, a 20% drop from 09/10 to the current 10/11 financial year was noted, with the caveat that there are still some registrations to be processed nationally, which may increase the figures slightly.

With respect to comparative R&D activity with other regions, it would seem that the Rockhampton region is showing a declining trend[11]:

- in the 10/11 financial year, the Rockhampton region accounted for 17% of registrations for the Central Queensland region.

- in the 09/10 financial year, the Rockhampton region accounted for 19% of the registrations for the Central Queensland Region.

- in the 08/09 financial year, the Rockhampton region accounted for 20% of registrants for the Central Queensland Region.

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[11] Data obtained from AusIndustry, June 2012.

3.10   Regional export statistics

Consultation with AusIndustry, AusTrade and the ABS has confirmed that there is a lack of information about export activity at the local government area-level. Data available from the ABS is disaggregated only to state level, with the exception of information specific to port activity (the nearest applicable site being Gladstone). For the Fitzroy region, conservative estimates from Trade and Investment Queensland suggest that the region generates approximately $450 million in non-coal and non-mineral commodities exports; with about $80-100 million in services exports not including tourism and education[12].   With respect to export of education services, information from CQUniversity's International Office shows that the Rockhampton campus hosted a total of 192 students in the 2011 calendar year, with a further 150 through the Language Centre and some 140 on short term study tours. The estimated value of this to the University was $2.1 million. However, it is unclear what this figure may be in total, once it includes the regional multiplier effect that is created by attracting students into the region (e.g. flow on expenditure by extended family through residency and/or tourism).

3.11   Industry Capability Network

The Industry Capability Network (ICN Gateway) is a national-wide business network that matches suppliers and service provides to major development and construction projects across Australia[13]. ICN records show some 301 businesses registered for the ICN have headquarters or branch offices within the Rockhampton region.

Table 13   Summary data by postcode, for businesses registered on the ICN Gateway (as at June 2012). Source: ICN, by request.

Source postcode	Number of businesses	Percentage of businesses
4699	2	0.7
4700	102	33.9
4701	85	28.2
4702	35	11.6
4703	30	10.0
4705	2	0.7
4710	6	2.0
4711	4	1.3
Total regional	266	88.4
Total non-regional^	35	11.6
Other Queensland	28	9.3
Other Victoria	1	0.3
Other New South Wales	6	2.0
Total	301	100.0

^ Postcodes outside of the Rockhampton area represent businesses with a presence in the Rockhampton region, but which may be headquartered elsewhere.

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[12] Trade and Investment Queensland, personal communication

[13] See more information at http://www.icn.org.au/

Table 14   Summary data by industry^ for businesses registered on the ICN Gateway (as at June 2012). Source: ICN, by request.

Industry or Sector	Total number
Basic Metal Products	1
Chemicals	5
Clothing Footwear and Leather Goods	2
Electrical Products	3
Electronic Products	3
Fabricated Metal Products	30
Food and Beverage	5
Furniture and Mattresses	2
Industrial Machinery Equipment	5
Management Consultants	1
Miscellaneous Manufacturing	9
Non-metallic Mineral Products	14
Plastic and Rubber Products	2
Software	3
Technical Consultants	12
Transport Equipment	2
Wood and Wood Products	3
Other (not labelled)	199

^ Categories are as self-described/self-selected by registrants

3.12   Accessed CQUniversity services (R&D)

Records from the CQUniversity Office of Research cannot be reproduced here due to confidentiality concerns. However, rough approximation suggests that R&D projects to the value of $980,000 have been undertaken with 12 different entities within the Rockhampton Regional Council area in the past five years (2008-12). However, the data are difficult to interpret, with some research agreements included sub-contracting, which makes it difficult to discern whether the activity is in fact of local origin.

The numbers of regional businesses engaged with CQUniversity in other ways (for example, informal research linkages, and formal or informal teaching and learning, service of other relationships) is unclear. However, the university is developing an engagement database (e-DNA) where relationships are logged, and this could allow for a more detailed understanding of the crossovers between CQUniversity and the regional business cohort.

3.13   Accessed government services

The numbers of businesses participating or using government services and products is helpful in getting a sense of interest levels and uptake/adoption trends across the region. The two main program areas are offered at the State and Federal levels. Within DSDIP[14], information is available

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[14] Department of State Development, Infrastructure and Planning; previously DEEDI (Department of Employment, Economic Development and Innovation).

regarding the numbers of business participants in "structured programs and activities; and the number of clients and business organisations assisted through significant consultations (Table 16).

At the federal level, within Enterprise Connect, as at April 2012, there are 15 businesses with business reviews approved in Rockhampton (postcodes 4699 to 4706). Of these 15 firms, 9 are delivered, 3 are underway and 3 are suspended. Information about service levels by AusIndustry are reflected in the information on R&D registrations.

Table 15   Summary data for State Government business interactions (Rockhampton Service Centre). Please note: Data labelled as 2011/12 reflects reporting as at 11 June 2012.

Business Development (structured or developed programs)	Number of sessions	Number of attendees
2009/2010	11	134
2010/2011	23	284
2011/2012	25	357
Industry Development (structured or developed programs	**Number of sessions**	**Number of attendees**
2009/2010	15	488
2010/2011	1	7
2011/2012	9	193
Other measures	**Significant contacts (one on one, >30 minutes duration)**	
2009/2010	157	
2010/2011	175	
2011/2012	265	
Other measures: consultative & engagements with industry and community stakeholders including networking	**Number of events**	**Number of attendees**
2009/2010	11	**223**
2010/2011	26	**718**
2011/2012	**5**	**na**

^ workshops/seminars/ networking

3.14   Energy use

Information from Ergon Energy indicates that the Rockhampton region had over 5,600 business premises with electricity connections in 2012, plus a further 1,200 connection points to agricultural and/or mixed-use commercial premises (Table 17). Energy connections are predominantly in the urban postcodes (4700-4702). The region has recorded a decrease in the total number of connections since 2010.

Within the Rockhampton region postcode range, the top-twenty consuming business and industry sectors represent some 77% of all electricity usage (Table 18). The mining sector easily accounts for the highest consumption of electricity, despite being ranked 81/255 in terms of the number of connections overall (Table 18). This is followed by local government (who have the largest number of connections; ranked 1/255), accommodation (4/255) and supermarket and grocery stores (22/255). There is then a 'long tail' of some 230 other industry codes, which combine to represent less than one-quarter of electricity consumption within the region.

Table 16   Summary data for Ergon Energy Limited, Business Customers by postcode by customer category, as at 2012.

Source: on request from Ergon Energy.

Postcode	Agricultural/ Irrigation connection Points				Mixed Use Irrigation/ Agricultural Premises				Business Premises				Mixed Use Commercial Premise			
	# of connection Points	% change from 2010	Mean Annual Consumption^	Max Annual Consumption	# of premises	% change from 2010	Mean Annual Consumption	Max Annual Consumption^	# of premises	% change from 2010	Mean Annual Consumption^	Max Annual Consumption^	# of premises	% change from 2010	Mean Annual Consumption ^	Max Annual Consumption ^
4699									68	5%	114,565	4,534,000				
4700									1,529	-4%	79,993	10,401,000	47	-7%	22,859	154,357
4701	13	-7%	55,415	479,737					1,321	-6%	117,726	29,347,000	77	-15%	21,680	312,453
4702	488	-4%	14,832	526,094	73	2%	10,517	48,966	1,543	1%	217,828	102,545,000	307	0%	16,721	259,728
4703	32	-34%	6,436	51,676	15	0%	6,967	13,642	817	-6%	57,335	7,659,000	63	-2%	19,374	157,145
4704									15	8%	19,982	95,450				
4705	17	-6%	4,487	26,187					67	-3%	16,362	213,018	20	6%	19,229	101,244
4706									16	-6%	6,404	23,432				
4710									151	-7%	24,142	457,893				
4711									12	0%	4,363	14,465				
4714									122	-7%	21,355	282,006	13	-10%	33,621	120,998
Average		**-13%**	**20,293**	**270,924**		**1%**	**8,742**	**31,304**		**-2%**	**61,823**	**14,142,933**		**-5%**	**22,247**	**184,321**
Total	**570**				**99**				**5661**				**542**			

Low Sample <10

^per connection point or premise (kWh pa)

Table 17   Distribution of electricity consumption and connections, by ANZSIC Code/Industry, for the Rockhampton Region: top twenty consumers. Source: Ergon Energy Limited, by request.

ANZSIC code/ Industry	Estimated % Distribution (by number of premises)	Estimated % Distribution (by kWh pa consumption)
1. Mining	0.25%	33.1%
2. Local Government Administration	12.47%	6.5%
3. Accommodation	3.24%	4.0%
4. Supermarket and Grocery Stores	0.98%	4.0%
5. State Government Administration	1.55%	3.7%
6. Meat Processing	0.18%	2.9%
7. Higher Education	0.15%	2.8%
8. Other Mining Services	0.20%	2.6%
9. Concreting Services	0.26%	2.4%
10. Water Supply	0.16%	2.1%
11. Interest Groups	4.80%	2.0%
12. Other Education	2.62%	1.6%
13. Accommodation for the Aged	0.32%	1.6%
14. Rail Transport	2.84%	1.5%
15. Telecommunication Services	3.31%	1.3%
16. Electricity Supply	0.92%	1.3%
17. Health Services n.e.c.	1.10%	1.2%
18. Radio Services	0.33%	1.1%
19. Cafes and Restaurants	1.31%	0.9%
20. Religious Organisations	2.89%	0.7%
All other industries	*60.17% (total)*	*22.62% (total)^*

^ and with no individual industry code exceeding 1%

3.15   Waste production

3.15.1 Carbon liabilities and NGERs reporting

The Liable Entities Public Information Database (LEPID) on the Clean Energy Regulator site carries a list of organisations with name, ABN and identifying number. There were 249 entries on the register for the 2012-13 financial year; those identified as relevant to the Rockhampton region are listed in (Table 19). The Clean Energy Regulator also publishes the totals of scope 1 and 2 greenhouse gas emissions, and energy consumption, reported by any registered corporation that exceeds the publishing threshold as specified in the NGER Act. The 2010-11 Greenhouse and Energy information by Registered Corporation[15] indicated that approximately 15 Rockhampton-relevant entities are listed from a total of 432 Australia-wide (Table 20).

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[15] Source: http://www.cleanenergyregulator.gov.au/National-Greenhouse-and-Energy-Reporting/Publication-of-NGER-data/greenhouse-and-energy-information/greenhouse-and-energy-information-2010-2011/Pages/default.aspx

Table 18 **List of Rockhampton-relevant entities liable for carbon penalties under the 2012-13 financial year^.** Source: LEPID register: http://www.cleanenergyregulator.gov.au/Carbon-Pricing-Mechanism/Public-information-databases/LEPID-for-2012-13-Financial-year/Pages/default.aspx

Company name	ABN
TEYS AUSTRALIA MEAT GROUP PTY LTD	65065093709
STANWELL CORPORATION LIMITED	37078848674
JBS AUSTRALIA PTY LIMITED	14011062338
CEMENT AUSTRALIA (QUEENSLAND) PTY LIMITED	70009658520

^ The list was searched manually, with entities deemed to be relevant to the Rockhampton region if they have a local presence (e.g. industrial/processing site), although the ABN may not necessarily appear with a Rockhampton-region postcode.

Table 19 **Rockhampton-relevant entities exceeding the NGERs threshold limits for greenhouse emissions, as at 5 March 2012.** Entities include those that operate from or in the Rockhampton region. (See footnote to table 13 above). All data is "as reported" by the controlling corporations.

Registered Corporations	Total scope 1 greenhouse gas emissions (tonnes CO_2-e)	Total scope 2 greenhouse gas emissions (tonnes CO_2-e)	Total energy consumption (GJ)
Teys Australia Pty Ltd	97,227	76,592	992,390
Stockland Corporation Ltd	29,050	132,685	945,227
Stanwell Corporation Limited	5,929,509	12,364	70,751,592
QR National Limited	659,175	455,050	11,337,322
QMAG Limited	376,339	112,058	2,605,781
Qantas Airways Limited	4,362,807	216,941	63,626,827
Mirvac Limited	13,635	175,893	891,473
McDonald's Australia Ltd	2,324	130,815	527,926
J.J. Richards & Sons Pty Ltd	58,688	4,005	859,176
Harvey Norman Holdings Limited	5,041	163,641	705,504
Ergon Energy Corporation Limited	106,157	771,915	4,685,392
Virgin Blue Holdings Ltd	1,887,287	13,081	27,165,476
Wesfarmers Limited	2,306,327	2,737,903	39,999,508

3.15.2 Regional business waste streams

In recent years, the Central Queensland Local Government Association (CQLGA) has undertaken a range of waste audits with businesses across the broader Central Queensland region under the TowardZero and RecycleRightCQ campaigns. To date, a total of 159 businesses have participated in the project, which includes an examination of both current and future waste streams. Summary data from that project are provided in Table 21, and show that approximately 90% of business waste materials are currently destined for landfill, with recycling representing only 10% of the total stream. However, forward predictions suggest that the recycling figure may rise to 25% of the overall stream in the future, showing a strong opportunity to work with businesses on recycling or waste clusters.

Table 20   Summary data from CQLGA's activities with regional business waste audits, to June 2012. Source: CQLGA, by request.

	Landfill (tonnes per annum)	Recycling (tonnes per annum)	Total waste stream (tonnes per annum)
Current waste stream breakdown	21,410	2,551	23,961
Future waste streams breakdown	16, 083	5,337	21,420
Change prediction	-25%	+109%	-10.6%
Potential future waste stream	89%	11%	
Potential extra tonnes from project (year to date)	67%	22%	
Current waste stream (based on tonnes)		7,888	

3.16   Descriptive statistics – Fitzroy Central West

The Australian Local Government Association (ALGA) releases a 'State of the Regions' report on an annual basis. Unfortunately, information is only provided to the level of statistical division (i.e., Fitzroy/Central West). However, noting general trends in the data may be useful, given that the Rockhampton LGA accounts for a large proportion of the population and business cohort in the wider region. In the latest edition, ALGA (2012) notes:

- The Central Queensland region experienced 7.1% growth in business income in the period 2010-12. This statistic measures the value of the businesses that operate in the region, as well as the relative performance of the economy as a whole.

- The Central Queensland region experienced 4.7% growth in industry gross regional product in the period 2010-12.

- The Central Queensland region ranks 62 with respect to the number of patent applications lodged per 100,000 people. The regional average application rate is 6.47 per 100,000 people, whilst the Australian average is 21.01.

4.   Focus study sectors

4.1 Transport, storage and distribution

This sector was chosen for a focus study in order to feed in to the current CQ Intermodal Transport and Logistics hub initiative in the Rockhampton region. The study was conducted by extracting businesses from the RRIP master database that had been coded under industry division 'I'; and/or those with relevant keywords in the entity or trading name[16]. A total of 320 businesses were extracted, representing those working across the transport (all modes), warehousing/storage and distribution/logistics areas.   However, this represents only approximately 55% of the 590 businesses that were listed the Australian Bureau of Statistics as trading within the 'transport, postal and warehousing' sector in 2011 (see Table 5).

Summary statistics were prepared for all 320 businesses that were identified as being of interest[17]. The key findings from these include:

- approximately 70% of the businesses are registered to the Rockhampton region, with a further 21% coming from elsewhere in Queensland;

- almost half of the entries (48%) are represented by private companies; with 22% being individual/sole traders and 17% being family partnerships;

- 17% of the entities are not currently registered for GST, but nearly 19% have been registered since 2000 (thus indicating at least a decade of trading experience in the sector). On the other hand, just over 10% of businesses appear to be 'new entries', having registered for GST less than three years ago;

- almost all entities have active ABNs, but none of the listed businesses have deductible gift recipient, fringe benefits tax, or income tax concessions, rebates or exemptions. Only five of the listed businesses appear on the ICN database; but 136 are listed within 'Australia on Disc'; and

- in terms of engaging with this group for innovation clustering, email addresses are available for approximately one-quarter of the cohort.

The master database listing was also supplemented with additional information from the Queensland Freight Transport Directory[18] . This directory allows for a search of carriers, specialised

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[16] Search terms included variations of rail, air, road, haulage, container, bulk, warehouse, distribution, transport, courier, freight, storage, handling, logistics. Entries were then checked manually following the data yield to remove irrelevant records.

[17] Full and summary information are both available on the 'transport sector' and 'transport statistics' tabs in the RRIP database

[18] http://www.whogoeswhere.com/

services, and support services for specific townships.). Each entry provides details of company name, email, web address, facilities, specialised services, depot locations, and frequency of service. A total of 72 listings from the Directory were noted for the Rockhampton region (with 14 of these also servicing Yeppoon) service (Table 23). However, closer inspection shows that only four of these entities had ABNs registered to the Rockhampton region, with almost 60% coming from elsewhere in Queensland. Of the carriers who service the region on a daily basis, most were Queensland-based, with one registered in NSW, three from SA and one in Victoria. Six of the listed businesses have been registered for GST for less than five years; whereas half have been registered for a decade or more.

Table 21 **Summary statistics for transport businesses servicing the Rockhampton region (as identified through the Queensland Freight Transport Directory, July 2012).**

Total number servicing Rockhampton (4700)	72
Total number servicing Yeppoon (4703)^	14
Frequency of service (self-described)	
4 times daily	1
As required	24
Daily	42
Onforwarding	1
Regular service	6
Twice weekly	5
Weekly	7
Source for ABN registration	
Rockhampton region	4
Other Queensland	42
NSW	8
SA	3
VIC	5
ABNs unknown	*10*
Type of entity	
Australian Private Company	47
Discretionary trading trust	1
Family Partnership	5
Individual/Sole Trader	1
Other partnership	1
Other trust	7
Not known	*10*

^ All of these entities were also listed for Rockhampton.

4.2 The tourism industry

The second focus study was conducted on the tourism industry, given that this is a key sector of interest for regional economic development in the Rockhampton region, as well as being one of the four economic pillars being pursued by the Queensland government. Unlike 'transport', the tourism industry does not have a specific or unique ANZIC code. This is because of the peculiar nature of

tourism activities of being defined not by the production or supply of a particular commodity type, but instead, the type of consumer[19].

For the purposes of this study, 'tourism' businesses were extracted on the criteria of division coding H (accommodation and food services), or those with entity or trading names containing tourism-related keywords[20]. This yielded a total of 326 businesses. Summary statistical analyses revealed that:

- some 60% of tourism businesses are registered to the Rockhampton region, with only 10% from elsewhere in Queensland, and just 5 businesses coming from other states;

- there is a broad mixture of entity types, including private companies (22%); family partnerships (24%) and sole traders (27%); but almost one-third of businesses are unknown with regard to structure;

- around 14% of tourism businesses are not registered for GST; some 20% have been registered for a decade or more, and only 5% have recently entered the industry (GST registration less than three years);

- whilst address details are known for over 80% of businesses, email contacts are currently available for only 12% of businesses. However, it is likely that this could be increased dramatically through manual retrieval from websites, although this would be a time consuming task[21]; and

- none of the listed businesses have deductible gift recipient, fringe benefits tax, or income tax concessions, rebates or exemptions. Only two of the listed businesses appear on the ICN database.

As done for the transport sector, a range of industry-based directories were also consulted for extra information on tourism businesses in the region. For example:

- The Queensland Tourism Industry Director contains details of offices, agencies and organisations, but not of operators themselves.

- Queensland Aboriginal Tour operators are listed in the 'Black Pages Directory'[22], but only one operator is relevant for the Rockhampton Region. Also, the Aboriginal Tourism directory[23] is available online, but no listings are carried for the Rockhampton region.

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[19] ABS (1999), Framework for Australian Tourism Statistics

[20] Search terms included variations of tour, hotel, motel, travel, marina, resort, café, holiday, restaurant, gallery, convention. Entries were then checked manually following the data yield to remove irrelevant records.

[21] This task was outside the scope of this research, however, it is estimated that approximately 10 emails could be sourced per hour. This process is slowed considerably because many operators do not publish direct email contacts, but instead use online enquiry forms (presumably in an attempt to avoid SPAM).

[22] http://aboriginaltouroperators.com.au/blackpages/qld/queensland.htm

- The Australian Tour Operator's Directory[24] contains information regarding group tour planning, but no Rockhampton listings could be obtained at time of writing.

Business clustering around innovative marketing methods may be useful in helping to increase exposure of regional tourism operators.

4.3 The digital economy (ICT)

The information, communications and technology sector is critically important to the ongoing development of the Rockhampton region. The region has been earmarked for rollout in the next round of the National Broaband Network, and a Digital Economy Taskforce has also been established, with membership amongst various stakeholder groups.

The focus study for ICT required a quite narrow definition of the 'sector'. For the purposes of this study, relevant businesses were considered to be those trading in ANSIC division J, as opposed to the much broader range of businesses that use and extend digital communications and technology within their workplaces. As per the earlier case studies, an extract of businesses was created from the master database using filtering by industry division, business category, and relevant search terms[25]. A total of 211 businesses were harvested using this method, with the summary statistics revealing:

- In general, there was less information with which to profile businesses in the the ICT sector, compared with the tourism and transport focus groups;

- postcode location was not available for over half of the businesses. For the remainder, only 38% were sourced from the Rockhampton region, and only small numbers from elsewhere in Queensland, NSW and Victoria;

- approximately 22% of the ICT businesses are sole traders, with <10% represented by private companies, and only 5 different entity structures recorded overall;

- almost 13% of businesses were not GST registered, and 10% of businesses with GST registration have been operating since 2000. Furthermore, based on GST registration dates, there have been less than 5, and typically only 1 or 2, new business entries in the ICT sector per year since 2001;

- only 20 of the businesses listed have active ABN status, but a large contingent (186 businesses) have no information available;

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[23] http://www.aboriginaltourism.australia.com/en-AU/Champions/Directory-results.htm?state=4

[24] http://www.atod.com.au/

[25] Search terms included variations of digit*, internet, web, telephon*, aerial, communication, computer, antenna, technolog*.

- despite operating in the ICT sector, email and URL addresses have been recorded by the ATO and/or AoD for only 13% and 18% of businesses, respectively; and

- Only two of the listed businesses appear on the ICN database.

In addition to this information, the Queensland ICT capabilities directory[26] contains additional information for six businesses with links to Central Queensland, which is presented in summary form in Table 24. As for the tourism and transport cohorts, business clustering for digital/online presence awareness and/or general capability profiling would appear to be useful with this group.

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[26] http://directories.deedi.qld.gov.au/ictcapability/

Table 22 Selected summary data for businesses registered on the Queensland ICT capabilities directory (search region = Rockhampton). Identifying names and ABNs have been removed for privacy purposes.

Name	1	2	3	4	5	6
Company Type(s):	Professional Services	Professional Services	Travel/Tourism	Professional Services	Business Intender	Professional Services
Export Status(s):	Potential Exporter	Not provided	New Zealand	Italy, New Zealand, United States of America	Not Exporting	
Industry Sector(s):	Accommodation / Hospitality, Heavy/Industrial Machinery and Equipment, Trade Services	Finance / Accounting, Retail	Accommodation / Hospitality, Tourism	Electronics, Industrial Products, Information and Communication Technology (ICT)	Education and Training, Health / Medical, Information and Communication Technology (ICT)	Building and Construction, Information and Communication Technology (ICT), Mining and Resources
Product / Service(s):	Internet and Web Services, Open Source, Software (Customised) and Related Services	Computer Repairs and Maintenance, Consultancy - ICT Business Services, Hardware - Retail and Wholesale. Computer, Communication and Office/Business Equipment.	Internet and Web Services, Software (Customised) and Related Services, Software (Off-the-Shelf)	Open Source, Simulation, Visualisation and 3D Modelling, Software (Customised) and Related Services	Telecommunications Hardware and Infrastructure	Software (Customised) and Related Services, Telecommunications Hardware and Infrastructure, Wireless Telecommunications and Broadband

5. Business data: constraints and gaps

5.1 Data constraints and challenges

In reviewing the results of this industry profiling exercise, five key challenges have been identified in undertaking regional business research:

1. There is a genuine lack of data available at the regional level, with many of the large datasets being available only at the statistical division or state level. Whilst there are several smaller datasets generated at the local level, these tend to require case-by-case processing in terms of identifying the source (e.g. ABS, ATO, or other); checking the validity of the data (including conflict with other datasets) and then combining these into a single reference tool.

2. The arrangements that are in place for privacy protection makes it extremely difficult to source contact information for regional businesses. Unfortunately, this is often the only way of discerning whether a business is actually operating in the region and/or whether the ABN registration instead refers to an 'administrative' point. Contact details are also essential for informing direct engagement with businesses, once potential clustering initiatives have been identified.

3. With respect to industry coding or categorisation, many government (e.g. ATO) and commercial (e.g. Sensis) sources rely on self-declared business information. These are reliant on individual registrants to correctly enter information regarding industry division and business capability. These data thus require careful interpretation given that one person's understanding and application of industry coding may differ from another's. The use of different classification systems (SIC, ANZIC 1993, ANZIC 2006) also frustrates efforts to collate data into a single reference source.

4. For some of the available statistics, there is poor clarity about their actual collection method, and thus how they might be used. For example, the registered address recorded for each ABN/ACN may refer to:

    - the physical premises at which operations are conducted; or

    - the mailing address for the business owners/operators; or

    - the mailing address for the taxation agents who handles the business affairs.

Consequently, when conducting searches by location (postcode), different interpretations of the data are possible. Summary data and statistics derived from postcode analysis should therefore be interpreted carefully. In another example, information about total employee number, or business turnover amounts, is often registered to business headquarters, rather than just the regional branch location. This can cause leakage in terms of reporting, with regional branches having their contributions reported under metropolitan head offices. The reverse may also be true, if a regional location hosts the lead branch of a company with multiple locations.

5. Establishing the accuracy of the dataset and accounting for exogenous business activity are also critical problems. The ABN lookup tool provides a good method for identifying

businesses registered to a target postcode range (notwithstanding point (4) above); but the source data changes daily, in reflection of ongoing updates to ABN information. Furthermore, it does not provide information about businesses that may be trading, or are intending to trade, within a region despite not being registered there. Beyond ad-hoc searching of commercial business directories, there is currently no clear way to account for those businesses that have a presence in CQ, but which are headquartered out of the region.

Clearly, whilst it is important to protect privacy and to minimise the reporting burden on business operators (and those who engage with them), there also needs to be considerably more effort devoted to compiling meaningful statistics on businesses and their activities at the regional level. Maintaining the currency of such a data compilation over time will also be important in informing regional (and other) decision-making.

5.2 Regional industry information gaps

The key information gaps that have been identified for industry in the Rockhampton region (and indeed, for local government areas more generally) are listed in Table 22. This list is not exhaustive, but instead has been compiled with the purpose of highlighting those data that would be particularly useful in informing business clustering activities for increased innovation at the regional level. For example, with respect to the regulatory profile across the region, if it were possible to identify local business cohorts that share similar environmental reporting obligations, then it might be possible to cluster these with the purpose of workshopping new ideas for meeting and exceeding compliance.

Table 23   Examples of gaps in business data and statistics at the local government area-level (Rockhampton Regional Council area).

Domain	Parameter(s)
Economy, finance and investment	• total business value by industry sector (e.g., derived from annual turnover figures)
	• business lending patterns (summaries by postcode)
	• supply chain partners at the business level
	• uptake of venture capital
	• alternative valuation of regional business activities, using combinations of employment and productivity figures, to help explore the potential impacts of infrastructure and business investment in a region*
	• inputs necessary to prepare locational quotients and other metrics, such as employment figures, wages and salaries, sales and service income, total income, total expenses, operating profit before tax, and industry value added**
	• breakdown of capital expenditure figures (for example, plant, machinery and equipment; dwellings and buildings/structures; and other (land, intangible

assets))[27].

Employment and skilling	• total employment by industry sector (e.g., employment numbers) • total number of employing businesses (with each identified, if possible) • relevant skills areas (current, forecasted) • source location of labour force
Resource use	• information on solid waste outputs – for example, volumes and nature of waste (e.g., regulated, recyclable) • patterns of use for public transport (current and forecasted) • renewable energy patronage
Information technology	• identification of all businesses with websites • existing needs and forecasted growth with respect to digital infrastructure (mode of access, download speed and capacity) • number, type and distribution of telephony and other IT connections
Regulatory & licencing profiles	• the Acts and/or Regulations influencing particular business operations, and the cohorts of businesses impacted by these.
Research & Development	• engagement with R&D providers • R&D expenditure

* these are already available (at cost) from regional growth models (e.g. in NIEIR[28]; REMPLAN), but not at the local government level . ** these data are available at the national and state levels, but not at the level of local government areas.

6. Regional business clustering

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[27] ABS Catalogue 8155.0 Australian Industry, 2010-11.

[28] National Institute of Economic and Industry Research

'Clustering' within industries – that is, bringing together businesses to connect and collaborate on issues and opportunities of common interest - has long been recognised as a key strategy to stimulate innovative thinking and practice. According to Porter (2000), industrial clusters are "geographical concentrations of interconnected companies with close supply links, specialist suppliers, service providers, and related industries and institutions (e.g. universities, standardising units and branch associations)" (p. 246).   However, emerging work in the field of innovation clusters is now also highlighting the potential of working across industries to exploit the 'adjacent possible' (Cooke, 2012; Asheim et al. 2011). The kind of approach is more firmly linked with regions as 'functional systems' rather than simply being defined by geo-political boundaries.

In scanning across the Rockhampton region for clustering potential, it is important to have regard to a number of influences:

- the current economic diversity, strengths and weaknesses of the region;

- the interests and capacities of the various regional stakeholder groups in supporting regional businesses in innovation clustering activities; and

- the regional aspirations in terms of future growth, diversity and innovation.

Information regarding the overall economic profile of the Rockhampton region is readily available[29] and will not be reproduced. With regard to current priorities by supporting agencies and other regional stakeholders, Table 25 provides a brief overview of the industry divisions for which there is known or expected interest in building clustering or other innovation-based activities. This shows activity across a broad range of sectors, which reflects not only the diversity of the Rockhampton regional economy, but also the value in working cross-sectorally when engaging in economic development activities. Finally, in terms of regional futuring, Appendix D contains a range of industry zoning maps relevant to the Rockhampton Regional Council area, but it should be noted that a new Regional Planning Scheme is currently under preparation and consultation, with revised mapping layers expected to be available by early 2013.

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[29] e.g., consult the Australian Bureau of Statistics 'QuikStats' product; the Queensland Office of Economic and Statistical Research; and various other purpose-built programs such as REMPLAN.

Table 24   Priority industries for business-industry stakeholders in the Rockhampton Region. (Please see page 4 for abbreviation listings).

Industry sector	CQUniversity	DSDIP^	Capricorn Enterprise	RDA – Fitzroy Central West	Department of Innovation, Industry, Science, Research and Tertiary Education	
	(research centres)	(four pillar economy)	(economic development initiatives)	(RDAFCW Regional Roadmap 2011-12)	EC target sectors^^	AusIndustry (key client base)~
A Agriculture, Forestry and Fishing	CEM CPWS	'agriculture'		✓		✓
B Mining	CEM	'resources'	GIA			✓
C Manufacturing	IRIS		GIA		✓	✓
D Electricity, Gas, Water and Waste	CEM CPWS				✓ (clean energy)	
E Construction		'construction'	GIA			✓
F Wholesale Trade						
G Retail Trade	BRG	'tourism'	Retail Focus Group			
H Accommodation and Food Services		'tourism'				
I Transport, Postal and Warehousing		'tourism'	Intermodal hub			
J Information Media & Telecomms	CINS		-----------------------Digital economy taskforce-----------------------			
K Financial and Insurance Services						
L Rental, Hiring & Real Estate		'tourism'				
M Prof, Scientific and tech Services		'tourism'				
N Administrative and Support Services						
O Public Administration and Safety					✓ (defence)	
P Education and Training	Dual-sector		Skills Focus Group	✓		
Q Health Care and Social Assistance	IHSSR Health CRN			✓		
S Other Services						
Other and/or cross-sectoral	Tourism	Tourism	Tourism; RRIL; infrastructure & investment group	Liveability and sustainability	Tourism Cross-industry^^	

^ including Australian Institute for Commercialisation and QMI Solutions division; ^^ the Rockhampton region forms part of the Enterprise Connect Innovative Regions Centre for Central Queensland, which enables relaxing of the 'target sectors' criteria to all industry types; ~ AusIndustry, personal communication.

7. Recommendations

Given the paucity of regional-level datasets, and the only brief consideration that has been given to existing and planned economic development initiatives for the Rockhampton region in this report, it is not appropriate to develop a detailed list of recommendations to guide clustering activities. However, in exploring and applying the datasets that are available, some of the broad messages for regional stakeholders might include the following:

- In exploring and extracting business lists for the purposes of guiding clustering activities, sector analysis has to go beyond ANSZIC coding if the listing is to be complete. For example, many businesses engage in activities relevant to 3-5 sectors, but can only nominate 1 or 2 on most directories. Use of the RRIP database, including searches based on industry division, 4-digit coding, business category and/or entity or trading name, can assist in identifying relevant businesses.

- in researching regional business profiles, a large proportion of the ABN's listed to a postcode range will not be of direct use for economic development activities. For example, many of these will represent ABNs obtained for administrative or convenience purposes and/or for non-employing businesses.

- many businesses may be administered out of the desired postcode range region, but could play a key role within the region (particularly for highly mobile industry sectors). This introduces the need to take a 'regional systems approach' to economic development, including the potential for inter-regional linkages. For example, this may involve Council-to-Council collaboration based on the key postcodes from which business linkages are sourced (see Table 4). Furthermore, clustering activities may be more fruitful where they are focussed on regional (and interregional) systems as 'functional' units, rather than simply as geographic ones. Applying superficial boundaries to clustering activities may risk excluding key elements of an industry or group.

Lobbying for change in the collection and reporting of regional-level business data should also be a key activity for those regions wishing to have a strong evidence-base on which to build regional economic development initiatives. To this end, a brief response to the Australia Bureau of Statistic's *Essential Statistical Assets for Australia* Consultation Paper is provided in Appendix E.

Acknowledgements

References

Asheim, B., Boschma, R., Cooke, P., 2011, Constructing regional advantage: platform policies based on related variety and differentiated knowledge bases, *Regional Studies 45(7): 893-904.*

Cooke, P., 2012, *Complex Adaptive Innovation Systems Relatedness and transversality in the evolving region,* Routledge, London, 256 pages.

Porter, M. E., 1990, *The Competitive Advantage of Nations*, Free Press, New York.

Appendix A:

Methods summary to procure regional business information and trend data

Source	Sought dataset	Comment
ABS (Australian Bureau of Statistics)	Regional–level information on business activity and economic development.	Business number by sector, by size (either number of employees or by turnover) is available at the resolution of Statistical Local Areas 2 (catalogue 8165.0 Counts of Australia Businesses, including Entries and Exits, Jun 2010-Jun 2011).
		Otherwise, the latest available information is from Census 2006; with Census 2011 not becoming available until second-half 2012.
		There are other nationally-level information sets, but these are not disaggregated even to state-level. These include:
		• 'innovative activity in Australia' by business size and sector (catalogue 8166.0 Data Cubes).
		• 'barriers and drivers to innovation' (catalogue 8158.0 data cube 6). business expenditure on R&D by size and sector (catalogue 8104 data cube)
		• Figures on IT use by Australian businesses by business size (catalogue 8166.0 data cube 1).
		• Characteristics of Australian Exporters (catalogue 5368.0.55.006), provides information to state-level only.
APRA (Australian Prudential Regulatory Authority)	Approached for information about trends/patterns in regional business loans and finance.	Requested information not held by APRA.
		However, information on regional 'points of contact' for financial

		organisations was obtained (see section 3.7) Refer to entry under 'Dun and Bradstreet'
ASIC (Australian Securities and Investment Commission), information brokers (15 available)	Purchased datasets providing more detail on specific companies, for example, annual revenue and total number of employees.	
ASIC Connect, Organisations and business names index search	Free access to business and company names by search, including name, ABN/CAN, company type, registration date, locality of registered office, and whether the organisation holds a professional licence or registration. Free online search tool available at https://connectonline.asic.gov.au/OPH/HelpLandingPages/SCH_ACON_TH_DEFINE_SEARCH	Formerly known as the National Names Index (prior to 28 May 2012) Not possible to search by postcode; rather, the site can be used to verify information about individual entities via the search. Locality of registered office is not clarified (for example, the possible options may include physical premises, mailing address, or tax agent's address)
ATO (Australian Taxation Office), ABN LookUp Tool for the Australian Business Register	Free searches on businesses by postcode. Parameters include Entity name, Trading Name, Status, ABN, ACN, entity type; state and postcode of registered address, date of establishment; GST[30] status and date of GST registration; and DGR[31] status.	Returned 17,905 entries for the desired postcode range, when limited to active and relevant entity types. Refer to summary tables in the results section for details of coverage.
ATO, General enquiries (research and statistics)	Requested information regarding key taxation statistics (for example, total regional business/company tax figures; payroll tax; total number of entities that lodged tax returns last financial year), as well as any breakdowns that are possible (e.g. contributions by industry/sector, or business size)	For federally-based business taxation information, information is not published at the postcode or state level. This is only possible for individual taxpayers.

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[30] Goods and services tax

[31] Deductible gift recipient status

ATO, Payroll Tax Register	Information that could be used to determine which regional businesses/companies that are employing (for example, via payroll tax registration)	Due to privacy concerns, cannot release information on any individual entity; nor is it possible to access summary data (e.g. 'x' number of companies are registered in Central Queensland)
AusIndustry	Summary figures on how many companies had claimed / registered for the R&D tax benefits	Not available
	Numbers and types of companies that have applied for R&D grants	Summary data only
	Numbers and types of companies that are known to be actively exporting	Not available from AusIndustry (referred to Austrade)
	Numbers and types of companies that have accessed AusIndustry products /services	Summary data only
Australia on Disc (A0D)	Purchased information set, searchable by postcode, which provides business category, company name, suburb, state, postcode, phone number, SIC Code, ANZSIC Code	Returned 6042 entries for the desired postcode range, and information is now provided in the Database.
(data sourced from Sensis WhereIs records)		Refer to summary tables in the results for details of coverage.
Australian Institute of Company Directors (AICD)	Summary details on the regional membership cohort and other relevant regional-level statistics	Refer to summary tables in the results
AVCAL (Australian Private Equity and Venture Capital Association Limited)	Venture capital trends for regional business	Refer to summary tables in the results
Capricorn Enterprise	Information about specific businesses who have engaged with CE products and services; summary information about membership	Specific business information not available due to privacy concerns. Summary-level data provided in results
Chamber of Commerce and Industry (Queensland)	Membership information and other relevant regional-level statistics	No Rockhampton chapter exists; request is pending with Brisbane office
Clean Energy Regulator	Register of regional companies liable for carbon penalties	Refer to summary tables in the results

Company360 (via CQUniversity licence)	Information on the National Top 500 listed companies, for those operating in the Rockhampton region, including: company information, including turnover, employee number, primary contact person, physical address, contact address, and selected information on trading activities, sector(s) of interest	Returned 101 entries for the desired postcode range, and information is now provided in the Database.

Refer to summary tables in the results for details of coverage. |
| **CQLGA** | Summary data regarding regional business waste audits | Refer to summary tables in the results

No data available at individual business level |
| **CQUniversity** | CQ 'Now' Framework
Regional businesses involved in university-based R&D (with CQUni)

Contribution of Rockhampton campus operations to regional export figures (education) | Summary information regarding the number of collaborative projects undertaken with industry are available.

Refer to summary tables in the results |
| **Department of Broadband, Communications and the Digital Economy (Federal)** | Information on the number of business connections to ADSL, dial-up | These data are not available, either by postcode, by business name, or in summary form |
| **Department of Employment, Economic Development and Innovation** | Level of businesses engagement with DEEDI products and services

Capability directory for information, communications and technology businesses | Business-level information not available due to privacy concerns.

Summary data is provided in the results

Summary data is provided in the results |
| **Dun and Bradstreet** | Purchased data set with ABN/ACN, entity name, contact details (address, phone, fax), revenue, number of employees, line of business, primary SIC, role and name of key decision maker | Returned 4,137 entries for the postcode range, but not all entries had all parameters returned. Refer to summary tables in the results for details of coverage. |

Ergon Energy	Number of business connections by postcode	Individual business data not available due to privacy concerns Summary data is provided in the results
Enterprise Connect	Information about specific businesses who have engaged with EC products and service	Not available due to privacy concerns. General (summary) information is available regarding participation levels and R&D investment.
	s	
Google Places (available online at http://www.roi.com.au/google-places-optimisation/how-does-google-places-work/)	Real-time information regarding physical location and contact details of businesses, by postcode, by sector. Sourced from Google Maps and Whereis Sensis	Freely available for viewing, but not downloading, and would require a new search to be initiated for each query.
ICN (Industry Capability Network)	Information about the numbers and types (industry/sector) of businesses registered on the ICN network, relevant to Rockhampton	Summary data is provided in the results
IP Australia	Information on patent applications activity by regional business	Summary data by postcode
FairWork Australia	Information that could be used to determine which regional businesses/companies that are employing (for example, via registration for worker's compensation)	Not available at this source
NGERS	Corporations listed on the NGERs register (reporting emissions under NGERs)	Summary data is provided in the results
Office of Fair Trading	Information about the numbers of business	Able to provide case-by-case verification of whether a particular

(Queensland) (Industry Licensing Team)	licences held, by postcode. (Free online search tool available at http://www.fairtrading.qld.gov.au/are-you-licensed.htm)	ABN has a current licence as introduction agents; property agents; motor dealers; commercial agents; second-hand dealers and pawnbrokers; security providers; tourism services; travel agents Cannot provide summary data by postcode
Regional Development Australia (Fitzroy Central West)	Demographic/summary information on regional businesses or business activity	None available that are additional to other Federal or State departmental datasets. No client management system is maintained.
Rockhampton Regional Council	Information on numbers of business licences held; statistics on water usage; water collection (e.g. number of wheelie bins per premises); information linked with employee number (e.g., number of amenities on premises).	Available in part, see results
Queensland Freight Transport Directory	Manual search, companies servicing or located in the Rockhampton region postcode range	Summary data is provided in the results
Telstra (Telstra Business Centre as well as parent company Bita)	Number of business connections (either telephone or internet) by postcode	Individual business data not available due to privacy concerns Summary data (e.g. total number of business and breakdown by sector) not available due to privacy concerns
Tourism Queensland	Directory of trading businesses/companies in the Rockhampton local government area	Pending
Workplace Health and Safety (Queensland) (Department of Justice and Attorney General)	Information that could be used to determine which regional businesses/companies that are employing (for example, via WHS registration)	Cannot release information on any individual entity. Owners of workplaces no longer need to register with Workplace Health and Safety Queensland (WHSQ). On request (and with approval), information can be released regarding number of WHS claims by region. General information on statistics, work related illnesses, injuries and fatalities by industry are freely available on the website (http://www.deir.qld.gov.au/workplace/statistics/index.htm). The Australian Safety, Rehabilitation and Compensation Commission holds statistics in their 'Compendium of OHS and worker's compensation statistics' (latest edition is December 2011).

Appendix B:

ANZSIC 2006 Division and subdivision codes and titles

Information in this report has been compiled based on the the ABS catalogue 1292.0, *Australian and New Zealand Standard Industrial Classification* (ANZSIC) 2006 (Revision 1.0). A full listing of codes to 4-digit classification level is also available here:
http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/1292.02006%20(Revision%201.0)?OpenDocument

A AGRICULTURE, FORESTRY AND FISHING
 01 Agriculture
 02 Aquaculture
 03 Forestry and Logging
 04 Fishing, Hunting and Trapping
 05 Agriculture, Forestry and Fishing Support Services

B MINING
 06 Coal Mining
 07 Oil and Gas Extraction
 08 Metal Ore Mining
 09 Non-Metallic Mineral Mining and Quarrying
 10 Exploration and Other Mining Support Services

C MANUFACTURING
 11 Food Product Manufacturing
 12 Beverage and Tobacco Product Manufacturing
 13 Textile, Leather, Clothing and Footwear Manufacturing
 14 Wood Product Manufacturing
 15 Pulp, Paper and Converted Paper Product Manufacturing
 16 Printing (including the Reproduction of Recorded Media)
 17 Petroleum and Coal Product Manufacturing
 18 Basic Chemical and Chemical Product Manufacturing
 19 Polymer Product and Rubber Product Manufacturing
 20 Non-Metallic Mineral Product Manufacturing
 21 Primary Metal and Metal Product Manufacturing
 22 Fabricated Metal Product Manufacturing
 23 Transport Equipment Manufacturing
 24 Machinery and Equipment Manufacturing
 25 Furniture and Other Manufacturing

D ELECTRICITY, GAS, WATER AND WASTE SERVICES
 26 Electricity Supply
 27 Gas Supply
 28 Water Supply, Sewerage and Drainage Services
 29 Waste Collection, Treatment and Disposal Services

E CONSTRUCTION
 30 Building Construction
 31 Heavy and Civil Engineering Construction
 32 Construction Services

F WHOLESALE TRADE
 33 Basic Material Wholesaling
 34 Machinery and Equipment Wholesaling
 35 Motor Vehicle and Motor Vehicle Parts Wholesaling
 36 Grocery, Liquor and Tobacco Product Wholesaling
 37 Other Goods Wholesaling
 38 Commission-Based Wholesaling

G RETAIL TRADE
 39 Motor Vehicle and Motor Vehicle Parts Retailing
 40 Fuel Retailing
 41 Food Retailing
 42 Other Store-Based Retailing
 43 Non-Store Retailing and Retail Commission-Based Buying and/or Selling

H ACCOMMODATION AND FOOD SERVICES
 44 Accommodation
 45 Food and Beverage Services

I TRANSPORT POSTAL AND WAREHOUSING
 46 Road Transport
 47 Rail Transport
 48 Water Transport
 49 Air and Space Transport

50 Other Transport
51 Postal and Courier Pick-up and Delivery Services
52 Transport Support Services
53 Warehousing and Storage Services

J INFORMATION MEDIA AND TELECOMMUNICATIONS
54 Publishing (except Internet and Music Publishing)
55 Motion Picture and Sound Recording Activities
56 Broadcasting (except Internet)
57 Internet Publishing and Broadcasting
58 Telecommunications Services
59 Internet Service Providers, Web Search Portals and Data Processing Services
60 Library and Other Information Services

K FINANCIAL AND INSURANCE SERVICES
62 Finance
63 Insurance and Superannuation Funds
64 Auxiliary Finance and Insurance Services

L RENTAL, HIRING AND REAL ESTATE SERVICES
66 Rental and Hiring Services (except Real Estate)
67 Property Operators and Real Estate Services

M PROFESSIONAL, SCIENTIFIC AND TECHNICAL SERVICES
69 Professional, Scientific and Technical Services (Except Computer System Design and Related Services)
70 Computer System Design and Related Services

N ADMINISTRATIVE AND SUPPORT SERVICES
72 Administrative Services
73 Building Cleaning, Pest Control and Other Support Services

O PUBLIC ADMINISTRATION AND SAFETY
75 Public Administration
76 Defence
77 Public Order, Safety and Regulatory Services

P EDUCATION AND TRAINING
80 Preschool and School Education
81 Tertiary Education
82 Adult, Community and Other Education

Q HEALTH CARE AND SOCIAL ASSISTANCE
84 Hospitals
85 Medical and Other Health Care Services
86 Residential Care Services
87 Social Assistance Services

R ARTS AND RECREATION SERVICES
89 Heritage Activities
90 Creative and Performing Arts Activities
91 Sport and Recreation Activities
92 Gambling Activities

S OTHER SERVICES
94 Repair and Maintenance
95 Personal and Other Services
96 Private Households Employing Staff and Undifferentiated Goods- and Service-Producing Activities of Households for Own Use

Appendix C: Standard Industry Classifications (SIC) codes

SIC (Standard Industry Classifications) differ from ANZIC codes. SICs are still used by some data and reporting services, particularly ASIC information brokers. The document below provides a detailed description of SIC codes at the two- and four-digit levels.

SIC_Booklet_v1.1_ju
n_2008.pdf

Appendix D: Rockhampton Regional Council industry zoning maps

The following maps provide information regarding industry zoning and other planning-scheme items, relevant to the Rockhampton Regional Council area. Please note that these refer to the the four previous council schemes, prior to the local government amalgamations of 2008 (Rockhampton City Council, Fitzroy Shire Council, Livingston Shire Council, and Mount Morgan Shire Council). Rockhampton Regional Council is currently reviewing/constructing a new planning scheme, but this is not expected to be released until the beginning of 2013. For more information, please visit:

Rockhampton Regional Council (2012) Fitzroy Shire Planning Scheme. [on-line]
http://www.rockhamptonregion.qld.gov.au/Council_Services/Planning_and_Development/Planning_Scheme.

Rockhampton Regional Council (2012) Livingstone Shire Planning Scheme. [on-line]
http://www.rockhamptonregion.qld.gov.au/Council_Services/Planning_and_Development/Planning_Scheme.

Gracemere.pdf   Yeppoon Zoning.pdf   Shire_Zoning
_West.pdf   Shire_Zoning
_East.pdf

Appendix E: Response to the ABS Consultation Paper

In May 2012, the ABS released the consultation paper, *Essential Statistical Assets for Australia – Investing in the Information that counts most.* The purpose of this document is to stimulate thought and discussion regarding the routine collection and reporting of statistics all elements of the Australian community, for use in underpinning decision-making and planning. In particular, the consultation paper seeks to

- identify areas of duplication and/or underutilisation;

- ensure that critically important data and statistics are of sufficient quality; and

- identify critical information gaps to be addressed.

The research undertaken for the Rockhampton Regional Industry Profiling project has highlighted a number of inadequacies in business statistics at the regional (local government area) level. Consequently, Table A below provides commentary on key parameters relevant to regional business and economic development activities.

Table A   Areas relevant to regional business and economic development activities, as identified from the preliminary list of 'essential statistics' from the ESA for Australia consultation paper

Parameter	Current status	Comment / recommended status
Gross domestic product Energy supply and use Greenhouse gas emissions Land statistics Water supply and use Labour force statistics	Definitely In	The paper does not make it clear that these will be disaggregated to the the SLA3 (local government area) level. This is essential if regional economic development activities are to be properly informed. It is not clear that disaggregation to industry division level will be provided in all cases.
Exports and imports of goods Income and labour dynamics Wage price index Internet access and usage	Probably in	The paper does not make it clear that these will be disaggregated to the SLA3 (local government area) level. Internet usage should be available at the individual business level (privacy protected), and should be elevated to 'definitely in'.

Parameter	Current status	Comment / recommended status
Business characteristics* (innovation information, e-commerce, small area business demographic information and business longitudinal database)	Possibly in	*Should be included as essential **Should be included where practicable.
Expenditure on R&D*		
Financial flow statistics*		
Access to essential services*		
Freight movement statistics* (by mode)		
Motor vehicle statistics**		
Business demography*	Possibly out	*Should be included as essential **Should be included where practicable.
Business performance indicators*		
Capital expenditure (new and expected)*		
IT use and Innovation by business*		
Value of building work done**		
(Business) recycling**		
Participation in vocational education and training (as a business)*		