MID-WESTERN REGIONAL COUNCIL RETAIL REVIEW

FINAL REPORT

RATIO CONSULTANTS
AUGUST 2005

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MID-WESTERN REGIONAL COUNCIL

RETAIL REVIEW

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Prepared for

Mid-Western Regional Council

August 2005

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APPENDICES

1 INTRODUCTION

1.1 INTRODUCTION

In July 2004, Ratio Consultants was commissioned by Mid-Western Regional Council to review and update the Mudgee Retail Study, which was undertaken for Council by Ratio in April 2000.

This report sets out the scope of work, principal findings and recommendations.

1.2 STUDY OBJECTIVES

The purpose of the Study was "*to undertake a comprehensive review of retail and commercial requirements for the Mid-Western Regional Council*". The study was required to "*review and build on the outcomes of the Mudgee Retail Study undertaken for Council in April 2000*". The supporting objectives of the Study encompassed the following:

- "*to review the Mudgee Retail Study and Council's strategy in the light of recent retail developments and approvals;*
- *to take account of current and projected population and residential development trends, and to review forecasts of households and population for the Mid-Western Regional Council area (for the period 2001-2031 with forecasts for intervening Census years to be provided);*
- *to undertake comparative assessments of the household income distribution in the Shire (1996, 2001) and in particular to undertake a detailed analysis of real changes in the distributional pattern;*
- *to assess changes in shopping behaviour on the basis of a new in-centre visitor survey to be undertaken at the Mudgee Town centre;*
- *to assess patterns of shopper behaviour at Gulgong on the basis of a new in-centre visitor survey to be undertaken at the Gulgong activity centre;*
- *to undertake detailed land use, floorspace and tenancy surveys in Gulgong, Rylstone and Kandos to complement updated inventories which are required to be prepared for the Mudgee Town centre;*
- *to undertake stakeholder/community workshops for the Mudgee Town centre, Gulgong, Rylstone and Kandos to assess and confirm local needs, values and priorities for the future planning and management of the respective activity centres;*
- *on the basis of the above factors, to review the recommended provisions of retail floorspace to meet the future needs of the Shire over the period 2004-2031 (with projections for three broad periods to be provided being 2003/04-2010/11, 2011/12-2020/21 and 2021/22-2030/31);*
- *to prepare recommendations to Council for strategic and policy development to support a proactive retail and commercial development framework focused to ensure competitive and high quality retail facilities and services to meet current and future needs of the Shire*". (Refer Study Brief and Work Program June 2004).

2 SCOPE OF WORK

Work undertaken for the project encompassed the following principal task areas:

- surveys;
- consultations;
- analyses;
- policy development and recommendations.

2.1 SURVEYS

Ratio Consultants coordinated in-Centre Visitor Surveys in each of the activity centres under study. A copy of the questionnaire is provided in Appendix 1. The surveys assessed:

- visitation patterns in each of the centres under study;
- residential catchment areas of each of the centres;
- frequencies of patronage;
- modes of travel;
- principal stores and services utilised by visitors (i.e. major attractors in each centre);
- suggested improvements for retail stores and services;
- suggested general improvements required in each of the centres;
- visitation patterns to centres outside the Mudgee area/Cudgegong Valley and escape expenditure patterns;

Surveys were undertaken in each of the activity centres as follows:

- Mudgee Central Business District (CBD): a total of 320 persons were surveyed on Wednesday 8 and Thursday 9 September 2004;
- Gulgong Town centre: a total of 140 persons were surveyed on Thursday 9 and Friday 10 September 2004;
- Rylstone and Kandos local activity centres: a total of 60 persons were surveyed in the two centres (30 persons in each centre) on Thursday 9 and Friday 10 September 2004 and on the following Thursday 16 and Friday 17 September 2004.

Land use and tenancy surveys were undertaken in Gulgong, Rylstone and Kandos. A copy of the Land Use and Tenancy Classification system applied in the survey is set out in Appendix 2. The existing Land Use Survey for the Mudgee CBD undertaken by Ratio Consultants in 2000 was updated. The surveys provided information on the following:-

- current patterns of land use in each of the activity centres;
- an analysis of each activity centre's functional structure and the mapping of functional precincts in the centres.

2.2 CONSULTATIONS

Two rounds of consultations are in the process of being undertaken for the study. An initial round was undertaken to identify key issues required to be addressed in retail strategy development and structure planning for the activity centres. In addition, the workshops provided important information on key values, perceived strengths and weaknesses and required objectives for the future development of each of the activity centres in the Shire. The first round was undertaken as follows:

- a review and workshop of the Mudgee CBD with the Mudgee Business Association. The workshop was held at the offices of the Westpac Bank at Market and Church Streets on Tuesday 7 September 2004. A list of attendees and proceedings of the workshop are provided in Appendix 3;
- a review and workshop of the Rylstone and Kandos local activity centres. The workshop was held at the offices of the former Rylstone Council Shire in Louee Street on Thursday 9 September 2004 with the Cudgegong Business Group. A list of attendees and proceedings of the workshop are provided in Appendix 3.
- a review and workshop of the Gulgong Town centre. The workshop is scheduled to be held at the CWA Hall in Gulgong on Thursday 21st October 2004. A list of attendees and proceedings of the workshop will be provided in Appendix 3.

A second round of consultations was undertaken in June 2005 to obtain feedback on the draft strategy. As a consequence of the consultations and reviews with Council, additional surveys and analyses were undertaken (refer section 2.3 below).

2.3 ANALYSES

In the course of conducting the study, the Consultants have undertaken the following analyses:-

- a review of residential development and population trends in the former Mudgee Shire and Rylstone Shire areas, and the preparation of projections residential development, households and population in these areas. A comparative analysis has then been undertaken of the updated population projections with earlier projections undertaken for the former Mudgee Shire in 2000 by Ratio Consultants;
- an analysis of the current provision of retail goods and services floorspace in each of the activity centres under study and an assessment of likely future requirements. The assessments have taken account of current development approvals;
- analyses of the current and likely future, roles and needs of each of the activity centres under study, taking account of the in-centre surveys undertaken for the project.
- assessments of the land use and functional structures of the land use patterns of the functional structures of each of the activity centres under study. The assessments have provided an important basis for a strategic planning review of the Shire's activity centres.

As indicated in section 2.2 the review of the draft report resulted in additional surveys and analyses being undertaken. These comprised: -

- detailed reviews of population and housing trends within the Mudgee and Gulgong districts;
- a review of parking supply and demand in the Mudgee CBD;

- a review of retail floor space changes in the Mudgee CBD and in the Sydney Road industrial area.

The review undertaken in June – August 2005 also resulted in additional recommendations to Council on the future planning and monitoring issues.

2.4 POLICY DEVELOPMENT AND RECOMMENDATIONS

On the basis of the above surveys, consultations and analyses, a set of recommended policies has been prepared to facilitate the long term planning and management of the Shire's activity centres that best meet the needs of existing and future communities in the Shire. The proposed policies are accompanied by recommended actions and programs focused on ensuring the Shire's activity centres will be maintained and viable central places for the foreseeable future. In addition this report contains recommended procedures for monitoring and managing planning and development in the Shire.

3 PRINCIPAL FINDINGS

The principal findings of the project addressed the following issues:

- population and household projections for the Mudgee and Rylstone statistical local areas (SLAs);
- a review of retail provision requirements for the Mudgee and Rylstone SLAs;
- an overview of the structure and function of the principal activity centres;
- an assessment of the roles, value and needs of each of the principal activity centres and implications for future planning and management.

3.1 DEFINITIONAL ISSUES

In 2004, the Mid-Western Regional Shire was formed as part of a statewide process of local government area amalgamations. It comprises the former Shire of Mudgee and most of the former Shire of Rylstone. At the present time, constant area historic information for the new Mid-Western Regional Shire is not available. For this reason, and due to the fact that the new Shire does not fully encompass the former Rylstone Shire, population projections were undertaken utilising historic information for each of the two former Shires (referred to in the report as Statistical Local Areas).

3.2 POPULATION AND HOUSEHOLD PROJECTIONS

Population and household projections were prepared for the Mudgee and Rylstone SLAs based on:

- historic and projected trends in residential development approvals in the two areas;
- likely changes to total dwelling stock in each of the two areas;
- analyses of historic and projected trends in occupied dwellings in the two SLAs (ie. the historic and projected relationship between occupied dwellings and total dwelling stock);
- historic and projected trends in the ratio of persons per occupied dwelling in each of the two SLAs.

Following the second round of consultations, an analysis was undertaken of population changes in the Mudgee and Gulgong districts. This analyses provided important information on the catchments served by both towns and on wider patterns of population and housing change.

3.2.1 Projections for the Mudgee SLA

The Mudgee Retail Study prepared for the Mudgee Shire Council by Ratio Consultants in February 2000 projected a population for the Shire of 24,360 persons by the year 2021, distributed in 9,850 households.

The current review prepared by Ratio Consultants (October 2004) identified a recent downturn in new dwelling approvals (over the period 1999-2004). However the long-term prospects for residential and population growths in the Mudgee SLA, remain positive on the basis of the diverse and growing local economy and on the basis of a number of new mining and other development projects which are likely to get underway in the district. On balance, the overall effect on the recent housing downturn will be to reduce projected growth in the total dwelling stock, resident households and population in the Mudgee SLA over future years.

The revised population and household projections are set out in Table B1. They show that the estimated resident population (ERP) is projected to grow from approximately 18,350 persons in 2001 to approximately 22,220 persons by 2021. This is lower than the earlier projections undertaken in April 2000, which indicated a projected resident population of 24,360 persons by 2021 (a difference between the two projections of approximately 8.8% by 2021).

The current study extended the residential and population projections to 2031. These are set out in Table B1. It can be seen that resident households are projected to increase to 9,670 (by 2031) and the resident population is projected to grow to 24,650 persons by 2031.

It will be noted that the revised population projections were developed on the basis of Australian Bureau of Statistics (ABS) data on dwelling and approvals provided for Statistical Local Areas in New South Wales (refer Table B.7). This information is consistent with the information used by Leyshon Consulting in their "*Review of Residential and Industrial Land Market – Mudgee LGA*" prepared for Council in April 2002. The projections by Leyshon Consulting indicated that Mudgee's total population could range between approximately 19,230 to 19,690 persons by 2011. Leyshon Consulting also provided population projection estimates for Mudgee SLA at 2016 as being in the range 19,810 to 21,320 persons (approximately) by 2016.

The projections by Leyshon Consulting are based on the application of compound growth rates. No housing model was developed or applied by Leyshon Consulting to develop these estimates. The analysis undertaken by Ratio Consultants is based on a housing model that has assessed:-

- historic and projected dwelling and approvals (refer Tables B.7 and B.8);
- the modelled relationship between historic approvals and total changes in dwelling stock (refer Table B.6);
- projections of total dwelling stock (refer Table B.5);
- projections of the percentage of occupied dwellings and occupied dwelling stock, trend analysis of the yield rate (that is, persons per occupied dwelling) and projections of the future estimated resident population (Tables B.3 and B.4).

The projected populations for Mudgee SLA and Rylstone SLA (refer Tables B.1 and B.2) are conservative. It is recommended that Council adopt these projections as the base projections for likely future housing and population development in the Shire over the foreseeable future. In our view, it would be inappropriate to reduce these projections to the levels indicated by Leyshon Consulting. In this regard, attention is drawn to Table B.8, which shows recent and projected dwelling unit completions in the Mudgee and Rylstone SLAs.

If population projections are to be reduced, then this would have the effect of lowering the projected dwelling unit completions (for Mudgee SLA in particular). It is maintained that the projections are conservative and provide for minimal rates of change. There is no logical or statistical basis upon which to reduce the projections indicated in Table B.8. It is recommended that the projections be progressively reviewed as more up to date dwelling and approval information becomes available from the ABS.

An analysis was undertaken of historic patterns of population change in the component areas of the Mudgee SLA. The results are shown in Table B.10. It can be seen that over the 10-year period 1991-2001 population growth has occurred in the Mudgee township, Gulgong township and the outlying rural areas of the Mudgee SLA.

Projections of the future residential population were prepared for sub-areas of the Mudgee SLA, based on an analysis of changes in total dwelling stock, occupied dwelling stock and the resident population at each Census in the component areas. The sub-areas of the Mudgee SLA for which projections were developed were:-

- Mudgee township;
- Gulgong township;
- other areas in the SLA (termed ‘rural balance’).

The resultant estimates are shown in Table B.10. They show that the estimated resident populations (ERPs) are projected as follows:-

- for the Mudgee township the population is projected to grow from approximately 8,940 persons in 2001 to 11,600 persons by 2021 and 13,170 persons by 2031. It is recommended that these projections be subjected to regular review.
- for the Gulgong township resident households are projected to increase by approximately 8% over the 20-year period 2001-2021 or by approximately 60 households (refer Table B.10). Average household size is projected to fall in all areas of the Shire. In the Gulgong township average household size is projected to fall from 2.64 persons in 2001 to 2.30 persons in 2021, a projected fall of approximately 12.9% in household size. As a consequence the resident population in the township is projected to marginally fall over the 20-year period.

  It is emphasised that the demand for services, and for retail and commercial floor space is a function of household formations and growth rather than population change. In addition further detailed analysis undertaken following the second round of consultations found that Gulgong serves an extensive district encompassing rural areas to the south of the township and districts to the north in the Dunedoo – Coolah area and in the Ulan area. (refer Table B.14). In 2001 the population of the Gulgong township was approximately 2,090 persons however, the district served by Gulgong encompassed the population of 8,300 persons. It is the district population and likely future trends that underpins the townships future prosperity and sustainability.

  New major developments are planned or likely for the Gulgong district. These include two new major coal mines (at Wilpinjong and Mollarben). The proposed mine at Wilpinjong is projected to generate approximately 300 new jobs (directly and indirectly). In addition a new resort is proposed to be developed south of Gulgong. These new developments are likely to have an upward affect on housing and population development and growth in the Gulgong district. It is recommended that recent and ongoing housing trends be monitored at the township and sub district level in order to provide a more accurate basis for population and housing projections.

> Consistent with the recommendations for the Mudgee and Gulgong townships, it is recommended that ongoing trends in population residential developments in the Gulgong township and rural areas be subject to regular review.

In summary, the current residential development and population growth projections indicate that the Mudgee SLA will continue to incur significant growth, notwithstanding a recent downturn in new dwelling approvals. However, the bulk of this population growth is likely to be concentrated in the Mudgee township and in the rural localities outside the township. Resident households in the Gulgong township are projected to increase over the period 2001 – 2021 – 2031. Current projections based on historic information indicate that the population of the Gulgong township is projected to be stable over the period 2001-2021-2031. These projections should be regularly reviewed, as local variations in residential development are likely to occur given projected new major developments in the district.

The long term distribution of the population growth and the commercial inertia of the Mudgee Central District (CBD) have significant implications in relation to the likely demand prospects for future retail and commercial development (discussed in Sections 3.3.1 and 3.3.2).

3.2.2 Projections for the Rylstone SLA

Residential and population projections were prepared for the Rylstone SLA as part of the study. A summary of the projections is provided in Table B.2. It can be seen that the resident population, which has been in decline since 1991, is projected to stabilise by 2006 and to increase over the projections period from approximately 3,900 persons in 2001 to approximately 4,280 persons by 2021 and 4,630 persons by 2031. It will be noted that there was insufficient information upon which to prepare separate projections for the Rylstone Township, Kandos Township and outlying rural localities. The need to establish a system to monitor ongoing trends in residential and other development approvals at the smaller level is recognised as an important requirement for the effective long-term planning of the Mid-Western Regional Shire, and forms part of the recommendations to Council (refer Section 4).

3.2.3 Overview of Population Projections

In summary, the estimated resident population of the Mudgee and Rylstone SLAs was 22,250 persons in 2001. It is projected to grow to 26,500 persons by 2021 and to 29,280 persons by 2031. In the context of establishing future retail provision requirements, there are two significant issues arising from the residential development and population projections that will directly impact on future demand growth. These are:

- a key demographic determinant driving rates of future retail demand growth is the rate of household growth, rather than the rate of population growth (assuming that there are no real changes in the distribution of household income). It will be noted that resident households in the Mudgee and Rylstone SLAs are projected to grow by more than 40% over the period 2001-2021, and generally this can be anticipated to be the order of real growth for retail goods and services in the Mid-Western Regional Shire (refer Table B.2);

- the projected household growth is likely to be highly concentrated, with almost 60% of the growth occurring in the Mudgee township and about 30% in the rural localities close to Mudgee. Current projections based on historic information indicate that the Gulgong township is projected to attract less than 3% of household growth in the two SLAs and the Rylstone SLA is projected to contribute about 9% of household growth. It is emphasised that this observation is based on available historic information and that population projections for Gulgong may be upwardly revised based on new major developments likely to occur in the district.

In summary, there is significant household growth projected for the Mudgee and Rylstone SLAs, but currently available information indicates that almost all of this growth is likely to occur in the Mudgee township or in the rural localities surrounding Mudgee. This is highly significant in the context of assessments of future retail and commercial floorspace requirements. There are significant implications related to new major developments in the Gulgong district. It is recommended that detailed population impact assessments be undertaken in relation to these projects. It is further recommended that a detailed review be undertaken of recent and emerging trends in dwelling approvals at a detailed spatial level.

3.3 RETAIL PROVISION REQUIREMENTS FOR THE MUDGEE AND RYLSTONE SLAS

In reviewing retail provision requirements for the Mudgee SLA and undertaking an assessment of requirements for the Rylstone SLA, the following factors were taken into consideration:

- current and emerging roles and land use structures of the activity centres in the SLAs;
- current supply levels, retail performance and prospects in each of the activity centres under study;
- recent and prospective retail commercial development and investment patterns in the activity centres and SLAs under study;
- population, and more importantly, household growth in the Mudgee and Rylstone SLAs and component areas;
- current and prospective patterns of escape expenditure (ie. retail and services expenditures made by residents of the Mudgee and Rylstone SLAs to towns and cities outside the two SLAs;
- current and prospective patterns of inbound expenditures (ie. retail and service expenditures made by tourists and other visitors from locations outside the two SLAs).

3.3.1 An Overview of Retail Activity in the Mudgee and Rylstone SLAs

The Mid-Western Regional Shire was formed in 2004 by the amalgamation of the former Shire of Mudgee and most of the former Shire of Rylstone. The new consolidated Shire is generally focused on the Cugegong Valley and adjoining districts. It is an area with a diverse economy generated by viticulture, intensive agriculture, mining and tourism.

The principal activity centres of the Shire are essentially service centres to the Cudgegong Valley and outlying districts; the future and long-term sustainability is substantially underpinned by the industries and tourism base of the Valley. Retailing and commercial services are important and growing sectors servicing the townships and rural localities that comprise the Shire and surrounding districts. At the 2001 Census, retail and commercial services provided some 1,827 jobs, which represented approximately 22% of employment in the Mudgee and Rylstone SLAs.

The service needs of the Shire and surrounding districts are provided by a hierarchy of activity centres as follows:

- The leading centre for the Shire and surrounding districts is the Mudgee Central Business District (CBD). The CBD is the principal retail and commercial services activity centre. It is also the seat of administration, education, professional and medical services, hospitality and entertainment for the Shire and surrounding areas. In retailing and service terms, the Mudgee CBD is the principal regional centre for the local region encompassing the Shire and surrounding districts. It provides a wide range of stores and services to meet weekly and day-to-day requirements and a high proportion of discretionary purchases.
- The Mudgee CBD is the pre-eminent centre for retail goods and services in the region, providing:-
  - full line supermarkets (Woolworths and Bi Lo);
  - discount department stores (Country Target, Best & Less);
  - a wide range of specialty stores and services within a highly concentrated core area of the CBD, focused on Church and Market Streets;
  - extensive professional, medical and education services together with hospitality, entertainment and trade services.
- Significantly, most of the retail commercial investment in the Mudgee and Rylstone SLAs over the past two decades has centred on the Mudgee CBD, and recently in the Mudgee Industrial area. The most recent information indicates that this pattern is likely to continue for the foreseeable future. Recent developments include:-
  - the Big W development (under construction);
  - improvements to the Town Centre development;
  - the Homeworks development;
  - the development of the Harvey Norman store.

  The current development trends reflect a dynamic pattern of investment that has gathered pace over the last decade for new retail development (or redevelopment) to be either focused in the CBD or located in the Mudgee Industrial area. The 'drivers' that have continued to generate this pattern include the following:-
  - the consistent and clear application of Council policy for most core retailing to be located in the Mudgee CBD;
  - market acceptance and endorsement of this policy as witnessed by the growing number of national chains and franchises that have located in the CBD;
  - the emerging policy position of Council to provide for the growing bulky goods market in the Mudgee Industrial area;
  - market support for further significant bulky goods development investment in the Mudgee Industrial area, driven by the ongoing growth in Mudgee and its Regional Catchment Area and desire for traders to acquire additional market share.

Following the review of the draft strategy, a limited update was undertaken of existing retail floorspace in the Mudgee SLA. The floorspace review takes account of the demolition of the Kelletts store and its replacement by a Big W development. It also takes account of new bulky goods developments that have occurred in the Mudgee industrial area (Sydney Road precinct) in the period between December 1999 and June 2005 (refer Table C). It is emphasised that the floorspace update has only considered major changes and that it is likely that there have been further changes in relation to the composition of floorspace (by major activity type). It is recommended that a new detailed inventory of retail and commercial floorspace be undertaken for Mudgee, and that this be extended to include Gulgong, Rylstone and Kandos.

The update of existing floorspace, subject to the above qualifications has nonetheless identified several major changes in the retail floorspace distribution in the Mudgee area. These include:

– an overall increase of approximately 11,000 m^2 in the supply of retail and commercial floorspace in Mudgee and Gulgong over the period December 1999 – June 2005, or an increase of about 9.3% over the approximate five-year period;

– a significant increase in the supply of bulky goods floorspace of approximately 6,000 m^2, or about 57%, during this period;

– further significant growth in bulky goods floorspace in the Sydney Road precinct (Mudgee Industrial Area). The precinct showed an overall increase in retail and commercial floorspace of approximately 8,000 m^2, or by about 23% over the five-year period.

The comparative analysis of retail and commercial floorspace also showed no significant change in the supply of floorspace at Gulgong and South Mudgee, and a marginal increase in the supply of retail and commercial floorspace in the Mudgee CBD (a net increase of approximately 2,400 m^2, or about 4% over the five-year period).

- The Gulgong Town centre is a historic central place with a heritage, arts and tourism focus. In retailing and commercial service terms, it fulfils the role of a local and district centre serving a trade catchment that extends north to Ulan. Gulgong has a range of stores and services, and provides for most day-to-day and weekly requirements of local and district residents. Key stores and services include:

  – a Bi Lo supermarket;

  – important local stores and services, including a newsagency, pharmacy, post office, banks and hairdressers;

  – a range of cafes, restaurants, hotels and bed and breakfast accommodation.

  Gulgong's essential strength is its heritage and authentic historic sites and buildings. Its narrow streets and vistas to nearby hills provide it with a unique ambience as a significant tourism attraction. Gulgong township and its town centre offer a number of historic attractions for visitors. The recent in-centre survey conducted by Ratio Consultants (September 2004) found that the town centre has an established role as a local and district centre with relatively high containment of food and grocery shopping trips. It also has a relatively high proportion of tourists among visitors to the town centre. The survey indicated that approximately 11% of visitors to the town centre were tourists (compared to 6% at the Mudgee town centre).

- **Rylstone and Kandos** are distinctive local centres located some 35 kilometres southeast of Mudgee. Located on the Cudgegong River, Rylstone has an attractive setting. The tree-lined principal shopping and service street (Louee Street) provides a village setting for the activity centre. However, it appears that the centre does not effectively meet local needs. The recent in-centre survey by Ratio Consultants (September 2004) indicated a high level of escape expenditures for purchases of groceries and food. The survey found that 86% of groceries and food purchased by local residents were made outside Rylstone. In addition, the centre has no pharmacy, which is considered a critical component for viable local and neighbourhood centre functionality.

  The recent survey undertaken by Ratio Consultants (September 2004) indicated that Rylstone derives much of its trade support from tourists. It was found that approximately 16% of patrons to the Rylstone centre were tourists or out-of-region visitors.

  The Kandos local centre extends over several hundred metres along Angus Avenue. The activity centre does not have an attractive focus or core area and contains a high proportion of vacant or 'part-time' shops and other business premises (that is, facilities only open for one or two days a week). As indicated in Section 3.3.3, the challenge for the Kandos centre is the facilitation of a focused retail core area of high amenity to serve the local community and visitors. In this context it is important to note that Kandos does attract tourists and out-of-region visitors. The recent survey undertaken by Ratio Consultants (September 2004) found that about 7% of patrons to the centre were comprised of tourists and out-of-region visitors, indicating the presence of a small and notable market that should be the focus of future consolidation.

- The **Mudgee Industrial Area** on Sydney Road provides for a range of building supplies and trade sales. An important issue for future policy development is the extent to which this area should be allowed or facilitated to develop as a major bulky goods precinct to meet the needs of the Shire and surrounding districts. This is discussed in Section 3.3.2.

- **Rural localities**. Mudgee is recognised as one of the premium wine producing areas in the country. There are some 39 vineyards in the Cudgegong Valley, most of which are located within 10 kilometres of the Mudgee township. Many of the vineyards provide cellar sales and café facilities. Whilst the importance of this activity is acknowledged, it has not been studied in any detail, and policy development for management and planning issues have not been developed in this report.

3.3.2 Future Retail Goods and Services Floorspace Requirements

This review has identified a future requirement for an additional **23,000 square metres (m^2) gross leasable area (GLA) of retail goods and services floorspace** over the period **2000-2021**, broadly comprised as follows:

- **food, groceries and liquor sales floorspace** (including supermarkets, specialty food stores, cafes, restaurants and liquor stores): an additional requirement of approximately **5,740m^2 GLA** over the 21-year period;

- **non-food retail goods floorspace** (including discount department stores, clothing and household goods stores, other specialty non-food stores and bulky goods stores): **12,440m^2 GLA** over the 21-year period;

- **retail services floorspace** (including banks, insurance and credit agencies, beauty salons and hairdressers, real estate agents, travel agents, video and computer hire stores, internet cafes): **4,000m² GLA** over the 21-year period.

Ratio Consultants undertook an earlier review of retail floorspace requirements for Mudgee Shire in April 2000 (refer 'Mudgee Retail Study', a study for Mudgee Shire Council, Ratio Consultants Pty Ltd). A comparison of the current projections with the earlier study indicates the following (refer Table A.2):

- The current projected demand for **food, groceries and liquor** floorspace is **marginally less than indicated in the 2000 study** (currently projected at approximately 6,000m² of additional floorspace requirements, compared to the earlier projection of 7,000m² for the period 1999-2021). The reduction in future floorspace requirements is a consequence of the following:
  - the reduced household projections for the Mudgee SLA (of about 1,300 households in the 20 year projection, 2001-2021, refer Table B.1);
  - the likelihood that the reduced household projections would not be compensated by any further increases in inbound trade for this retail category.
- The current projected demand for **non-food retail goods floorspace** for the period to 2021 **is notably higher than originally indicated in the 2000 study** (12,440m² GLA compared to the original projection of 10,620m² GLA, refer Table A.2). The higher requirement has arisen as a consequence of:
  - likely higher real demand for bulky goods;
  - the likelihood of significant reductions in escape expenditures being achieved over the next decade as new recognised traders locate in Mudgee.
- The current projected demand for **retail services floorspace** for the period to 2021 is **lower than that originally forecast in the 2000 study** (refer Table A.2). The assessment indicates that approximately 4,000m² will be required for retail services floorspace, compared to approximately 5,800m² in the earlier study. The reduced additional quantum of floorspace is a consequence of:
  - a downward adjustment in the long term rate of provision of retail services floorspace for Mudgee and its Regional Catchment Area (from about 1.9 to 1.7m² GLA per effective supporting resident household);
  - a reduction in the projections of local households that would be unlikely to be compensated by inbound trade for this retail category.

In summary, the review of retail floorspace requirements undertaken for the study indicates that there is a need for approximately 23,000m² of retail goods and services floorspace in the Shire over the period 2004-2021. The bulk of this floorspace (approximately 65%) is likely to be required in the Mudgee CBD. A notable proportion (approximately 25-30%) is likely to be required as bulky goods floorspace; and the major proportion of this may be more suitably located in a consolidated trade precinct in the Mudgee Industrial Area. Over the period 2004-2021, it is likely that the following facilities will need to be accommodated in the Mudgee CBD:

- a second major discount department store (in addition to the Big W store currently under construction at the former Kelletts store site);
- a third supermarket;

- provision of a number of secondary attractors including homewares stores, clothing stores, music and book stores, food stores and cafes;
- provision of additional facilities for retail and professional services.

The recommendation made in Section 3.3.1 is restated for convenience here, namely that a new detailed inventory of retail and commercial floorspace be undertaken for Mudgee, and that this be extended to include Gulgong, Rylstone and Kandos.

An important challenge for policy development is the role of bulky goods retailing to meet the growing needs of the Shire and its region. It is likely that there will be significant prospects for the future growth and consolidation of this sector in the Shire over the next ten years and beyond. An important challenge will be to provide a location and planning framework that:-

- best meets the emerging and future needs of the Shire and surrounding districts;
- best contributes to a sustained reduction in escape expenditures for retail goods and services;
- reinforces the regional role, competitiveness and long-term sustainability of the Mudgee CBD.

In relation to the bulky goods issue, it is likely that there are at least three strategies available to Council in relation to the location, establishment and management of a future bulky goods district. These are:-

- designation and facilitation of a bulky goods precinct to adjoin or as part of the Mudgee Industrial area focused around Sydney Road. It is recognised that this is the current direction of Council policy;
- investigation of the suitability and practicality for the establishment of a bulky goods/homemaker precinct in the Church Street area (south of Gladstone Street). This area currently lies within a 3A Zone as designated in the Mudgee LEP. The strategy would be given effect through the strategic consolidation of land for car parking and development and the preparation of a DCP for the area;
- a strategy which provides for the higher value/more intensive bulky goods stores to be located in the Church Street South area (eg. homewares and furnishings stores, music stores, sporting goods stores); and for the most space extensive stores/lower value bulky goods stores to be located in the Mudgee Industrial area focused around Sydney Road (eg. hardware stores and builders supplies, automotive parts supplies, boat supplies, agricultural equipment supplies, etc). This would constitute a further refinement to current Council policies, but it may well offer the best long term strategy to most effectively reinforce and add value to the Mudgee CBD and assist its development as a high quality regional attraction and service centre for the Shire and surrounding districts.

3.3.3 Clarification of Future Commercial Land and Zoning Requirements

This review has identified that significant demand for additional retail goods and services floorspace is likely to be required in the Mudgee CBD, and to a lesser extent in the Mudgee Industrial area. As indicated above, it is recommended that Council should as a matter of priority resolve its policy stance in relation to the future strategic direction and allocation of retail and commercial land, particularly in relation to the management of bulky goods floorspace requirements over the next two decades and beyond. Once this has been resolved, it is recommended that a floorspace and land budget be prepared and that this be reconciled against future zoning requirements.

3.3.4 Gulgong Town Centre, Rylstone and Kandos

An assessment was undertaken of current patterns of activities in the Gulgong Town Centre and in the Rylstone and Kandos activity centres. In addition, in-centre surveys were undertaken in each of the activity centres. An overview of these centres arising from the assessments and the survey observations is set out in Section 3.3.1. In addition, consultations with stakeholder groups were held for these activity centres. The results are set out in the following section. It is recommended that structure plans be prepared for the Gulgong Town Centre and the Rylstone and Kandos activity centres to provide an effective land use and management framework for the future of these centres which recognises their historic setting, community values and the need to secure long term sustainable viability for these centres in the future.

3.3.5 Stakeholder Values and Needs

As indicated in Section 2.2, a set of consultations with local business associations was conducted in September and October 2004. Workshops were conducted with the Mudgee Business Association, the Cudgegong Business Group and the Gulgong Chamber of Commerce. The proceedings of the workshops and a list of attendees are set out in Appendix 3. The workshops identified the perceptions, priorities and key values of business stakeholder groups and provided important guidance for the development of policy to direct future planning and management of the Shire's principal activity centres.

Mudgee Central Business District

A workshop was held with the Mudgee Business Association at the offices of the Westpac Bank (Tuesday 7 September 2004). Important issues arising from the workshop included the following:-

- a clear recognition of the key strengths of the Mudgee CBD that included its pedestrian scale and relative compactness, its high level of amenity and attractiveness and its prosperity emphasised by the absence of vacancies in the core area and the number of national franchises operating in a relatively small regional city. It was recognised that the prosperity of the CBD was a reflection of the diversified and growing economy and the benefits brought by tourism to the City and its region;
- a perception that there are limited areas close to the established core available for the future expansion of the CBD, was a weakness identified by the workshop. Ongoing functional problems with Byron Place also constituted a recognised weakness of the CBD. Limited parking in the Retail Core Area of the Mudgee CBD was also raised as a weakness, though it was recognised that this in large part reflected the attitudes of local residents in particular to be prepared to walk to car parking spaces beyond the core area (as is the case in larger regional cities);
- the CBD was viewed as providing significant new opportunities, particularly for new shopping developments, serviced offices and a cinema-based entertainment centre. The presence of service stations within the Retail Core Area also provided a long-term opportunity for future development sites, if these service stations could be relocated. In addition, potentials for Mudgee to develop as a retirement centre were seen to provide further opportunities for investment and the consolidation of the CBD;

- the key threats to the CBD included the effects of possible improved access to larger regional cities and consequent impacts on the competitiveness of the Mudgee CBD. There was also a view expressed by the workshop that one of the key strengths and points of difference of Mudgee is its 'country feel' and that increased urbanisation which would be reflected by the development of traffic lights and internal shopping centres would act to destroy this ambience and uniqueness of the Mudgee CBD.

  It was further felt that with improved highway access to other regional cities (eg. a future connection to Orange) that the larger size and wider range of goods and services at competing regional cities such as Bathurst, Dubbo and Orange, or centres in Western Sydney, would increase the potential for escape expenditures from the Cudgegong Valley.

The optimal future for the Mudgee CBD was seen to comprise the following elements:-

- long term planning and development of Mudgee as the regional government and professional services centre for the Shire and surrounding districts;
- the need to develop a high quality regional level sporting and recreation centre to improve the attraction and competitiveness of the Township and its CBD;
- the need to provide for high quality medical service centres;
- ensuring that there is wider public recognition of the public transport services available in the Mudgee township;
- securing a strategy for the quality extension of the retail core area in the Mudgee CBD, which will include the development of new retail attractors and the full integration of the extension area with the historic retail core;
- substantial improvements to the level of street lighting in the Mudgee CBD in particular, and the wider township in general.

In summary, the workshop demonstrated that the business stakeholders have an active interest and can make an important contribution to the long-term planning of the CBD. The importance of the perceptions and values of local stakeholder groups is a common theme also observed in the workshops at Rylstone and Gulgong. A framework designed to ensure closure cooperation between these groups and Council is set out in the recommendations in Section 4.

Gulgong Town Centre

A workshop was held with the Gulgong Chamber of Commerce at the CWA Hall in Gulgong on Thursday, 21 October 2004 (refer to Appendix 3 for a list of attendees and proceedings). The key findings to emerge from the workshop included the following:-

- the key strengths of Gulgong related to its people. It was viewed as being a close-knit and mutually supportive community. The workshop also identified the arts orientation of Gulgong and its community as a unique strength. The conservation and heritage values of the town were also seen as important strengths which provided the community with a nationally acclaimed resource for tourism;
- the workshop recognised that the extent to which Gulgong fails to fully cater for tourists (eg. hours of operation of stores and services) is a weakness of the town and its CBD. Poor management of trucks in Mayne Street and speeding vehicles in Herbert Street were also seen as weaknesses of the CBD, in addition to the lack of parking in the core area;

- the workshop recognised that there are substantial opportunities to develop the legacy of the gold mining history of the town. In addition, there are also opportunities to develop Gulgong as a wine centre and to implement proposals for the restoration of the railway station precinct;
- the quality of Council governance and the implementation of planning decisions as they impact on Gulgong were seen as the most significant threat for the future viability of the Town Centre.

Key initiatives identified by the workshop included:-

- the need for qualified planning staff to be based at Gulgong on a day-to-day basis, to ensure local needs and issues were addressed and identified planning strategies and development works were implemented[1];
- other projects that were identified included:
  - a proposal for traffic calming on Herbert Street;
  - the implementation of rumble zones at the entrances to Mayne Street;
  - continuing the program for the undergrounding of power in the Town centre;
  - the need for a tourist signage plan clearly identifying historic sites, walks and places of interest, etc;
  - a project to reflect the gold mining history and legacy of Red Hill;
  - the restoration of the railway station precinct.

A workshop review held in June 2005 provided feedback in relation to the draft report. The principal aspects of this feedback related to the following issues:

- stakeholders were concerned that the population projections provided for Gulgong in the draft report did not adequately or accurately reflect the town's role and future. As a consequence, the Consultants have initiated the following:
  - a detailed analysis of the functional district served by Gulgong, which encompasses a population of approximately four times that of the township (discussed in Section 3.2.1);
  - a recommendation that a detailed review and monitor be kept of housing approvals in the Gulgong township and district;
  - the proposal that a detailed analysis be undertaken of the housing impetus that Gulgong could achieve as a consequence of the future mining developments and tourist resort envisaged for the Gulgong district.
- Following discussions with Council officers in relation to town planning services at Gulgong, this Report recommends that the current system, based on providing effective service standards of response to meet local needs, be monitored and reassessed over a six-month period.

[1] The views of stakeholders as expressed at the workshop at Gulgong have been set out in their entirety in order to provide a comprehensive account of the workshop. Council has set in place a response system to provide prompt and efficient town planning advice and decision making to Gulgong residents and other stakeholders. Wider communication of this system is recommended (refer Section 4.1).

Rylstone and Kandos Centres

A workshop with the Cudgegong Business Group was held at the offices of the former Rylstone Shire Council in Louee Street, Rylstone on Thursday, 9 September 2004 (refer to Appendix 3 for a list of attendees and proceedings of the workshop).

The workshop recognised Rylstone and Kandos as unique places with their own character and needs, though the proximity of the two towns raised issues of their future inter-dependence.

Rylstone's key strengths were identified as:-

- the village ambience and feel of the activity centre;
- the fact that Rylstone is a 'farmer's town' and is a central place for the surrounding rural district;
- the observation that the town is a recognised tourist destination and has 'brand value'.

The weaknesses of Rylstone, as identified by the workshop, included:-

- a lack of public amenities;
- limited scope for the consolidation of the town centre, attributed to the high concentration of ownership of main street properties and limited opportunities for investors to develop;
- problems of an ageing population;
- the observation that medical facilities were not keeping pace with population changes.

The history of Kandos as a town that provided accommodation for miners and utility workers was recognised by the workshop. Key strengths of the Kandos town centre included:-

- the range of public amenities, sporting and recreation facilities available to the town;
- the park entrance to Angus Avenue.

The workshop identified a number of weaknesses of the Kandos centre that included the following:-

- Angus Avenue, the main street, was viewed as essentially a harsh and barren environment that needed landscaping and some 'softening';
- Angus Avenue was also viewed as a very long street to service a relatively small town centre. It in fact comprises two separate shopping areas;
- the community hall was seen as being impractical and in need of upgrading;
- there was poor signage in the town;
- the fact that Angus Avenue is not a through-route was seen as a disadvantage for a small town centre as this structural condition would always tend to minimise traffic in the town centre;
- the ageing population was seen as a pervading and long-term weakness of Kandos and its town centre.

The workshop recognised that the long-term revitalisation of Rylstone was underway, with the occupancy of formerly vacant properties in the township and town centre. It identified a number of important initiatives to further assist and reinforce this process. These were:-

- a strong focus to develop 'bush retreat' properties in the Rylstone and Kandos areas;

- Rylstone and Kandos should be marketed as complete/integral destinations with their own unique character and attraction, and not as an appendage to Mudgee;
- long term social and economic benefits would be likely to flow to both towns with the upgrading of the Bylong Valley Way which runs north to Muswellbrook and provides connections to Newcastle. This would provide a new north-south route through the towns to Lithgow and beyond;
- there is a need for a quality tourist information centre at Rylstone;
- in addition, there is a need for a number of urban design initiatives to further improve the ambience and attraction of Rylstone as a tourism place and destination. These initiatives could encompass:
  - quality signage and lighting schemes;
  - toilets and public amenities;
  - new seating and footpaths;
  - a program for the cleaning up of sites;
  - improvements to and promotion of the camping area.

The workshop recognised that improvements to the Kandos centre should be focused on improving the amenity, landscape quality, signage and lighting of the main street.

In summary, the workshop with the Cudgegong Business Group clearly identified that the greatest strength of the two towns is their unique setting and rural environment. They should be marketed and promoted as a unique destination for weekend and longer stays, and the range of experiences that a small community close to nature could provide.

3.4 REVIEW OF CAR PARKING DEMAND AND SUPPLY IN THE MUDGEE CBD

Following the draft report's preparation (February 2005), Ratio Consultants was commissioned to undertake a brief review of car parking demand and supply in the Mudgee CBD. A survey was undertaken on Thursday 16 June 2005. The survey provided information on the existing supply of on-street and off-street parking available to the public in the Mudgee CBD, together with an inventory of peak hour car parking utilisation on that day. The survey's results were analysed together with the updated retail floorspace information.

The new survey was undertaken to assess changes in car parking demand since the initial retail study prepared for the Council in April 2000 (the car parking and floorspace surveys were undertaken in December 1999). The car parking survey's results included a detailed site-by-site analysis, as shown in Table P.1. They also incorporated an analysis of estimates of current peak hour car demands related to retail floorspace. The surveys and analyses took account of the retail floorspace adjustments in the Mudgee CBD, allowing for the Big W development, and the resultant net increase in retail floorspace of approximately 2,444 m^2 GLA.

The updated car parking and floorspace survey's principal findings were as follows:

- the **average peak hour utilisation level** for the Mudgee CBD and selected adjoining street areas was **72.1%** (compared to approximately 67% for peak hour use of the CBD and adjoining areas as surveyed in December 1999);

- the current (June 2005) peak hour demand for retail shop floorspace is approximately 3.45 car spaces per 100 m^2 gross floor area (GFA). The current assessed peak hour rate of car parking demand represented a mid-winter rate, and the adjusted rate for early December is estimated at approximately 3.65 car spaces per 100 m^2 GFA (refer Table P.2, items 9 & 10). As a comparison, it will be noted that the observed rate of car parking demand in the December 1999 survey was 3.35 car spaces per 100 m^2 GFA shop floorspace (refer Ratio Consultants, April 2000, Mudgee Retail Study: a Study for Mudgee Shire Council, Table J.2, item 8).
- On the basis that the desirable rate of car parking provision is approximately 3.33 car spaces per 100 m^2 GFA shop floorspace (as indicated in the Mudgee LEP), there is a projected peak hour deficiency (based on December demands) of approximately 0.32 car spaces per 100 m^2 GFA shop floorspace. On this basis, there is a car parking supply deficiency in the Mudgee CBD of approximately 82 car spaces (refer Table P.2, item 12).

It is emphasised that the assessed car parking supply deficiency is based on an estimated projection for car parking demands in a December period in Mudgee. Therefore, it is recommended that Council undertake a verification survey of car parking demands in the Mudgee CBD in early December 2005, so that a strict comparison with the December 1999 car parking survey can be made.

4 RECOMMENDATIONS TO COUNCIL

4.1 RECOMMENDED POLICY FRAMEWORK

It is recommended that:

- a Strategic Context Statement be prepared to guide Council's Local Environmental Plan (LEP). An important component of the Strategic Context Statement should be the intended role and policy directions for the activity centres and precincts of the Shire;
- the activity centres hierarchy for the Shire should reflect the following objectives to guide the area's long-term strategic planning, management and development:
  - Mudgee Central Business District is the principal town centre for Mudgee and its region; providing administrative and community services, and serving as the major retail and commercial centre for the Shire and surrounding districts. Strategic objectives for the Mudgee CBD should be required to ensure the following:
    - that all regional level retail facilities, other than approved bulky goods stores and services, are located in the Mudgee CBD, or approved extension areas of the CBD;
    - that the Mudgee CBD is the preferred location for regional level office and commercial development;
    - to recognise and protect the Cudgegong River and riverine areas in the long-term planning development of the CBD;
    - that the CBD's future growth and development reinforces the existing historic retail core area focused on Church and Market Streets;
    - that future retail and commercial development is street-based, and that active street frontages be required to address pedestrian networks and spaces;
    - that future retail and commercial development respects the built form and scale of the Mudgee CBD, its pattern of development and historic landmarks.
  - Gulgong Town Centre is recognised as a heritage town of national significance. Recommended policies for the strategic management of the town centre address the following:
    - recognition of the heritage and conservation values and designated areas in the township and the town centre, and that future refurbishment and development be required to strictly accord with heritage and conservation design guidelines for designated areas;
    - designation of the area generally bounded by Medley, Queen, White and Robinson Streets as the activities core district of the Gulgong Town Centre. It is recommended that long term planning of parking, urban design, traffic calming and landscaping improvements be directed to encourage and facilitate future retail and commercial developments and improvements to be focused in this area;

- preparation of a comprehensive signage strategy for the township and the Gulgong town centre directed to assist tourists and other visitors to the town centre;
- preparation of a Gulgong Priority Works And Implementation Plan to be administered by a resident planner or engineer responsible to a Gulgong Steering Committee.

It is further recommended that Council extensively communicate the current improvements made to the provision of town planning services and advice to residents and other stakeholders in Gulgong; and that a review be undertaken within six months of the implementation of the communication program to assess resident and stakeholder responses and to review possible further improvements.

– Rylstone Activity Centre is recognised as a distinctive tourism and service centre. Recommended policies for the strategic management of the village centre include the following:

  - delineation of the urban design and place-making values that define Rylstone as a distinctive town centre;
  - establishment of a strategic plan for the long term planning and management of the Rylstone township and its activity centre. The plan will be directed to the facilitation of a viable activities core area in the town centre to be reinforced as a distinctive central place through the development and application of urban design guidelines that respect the built form and setting of the town centre;
  - facilitation of residential development opportunities in areas immediately adjoining the defined activities core area.

– Kandos Activity Centre is recognised as a long-standing service centre for its community and surrounding district. Recommended policies for the strategic management of the village centre include the following:

  - establishing a strategic plan for the long term planning and management of the Kandos township and its activity centre. The plan will be directed to the facilitation of a viable activities core area in the town centre;
  - preparing landscape and urban design guidelines for Angus Avenue to improve the amenity and presentation of the street;
  - facilitating residential development opportunities in areas immediately adjoining the defined activities core area.

It is further recommended that:

- The projected populations for Mudgee and Rylstone SLAs contained in this report be adopted as the base projections for likely future housing and population development in the Shire, subject to detailed reviews of housing development at the small area level (township and district level), and the results of the forthcoming 2006 Census of Housing and Population. These reviews should adequately consider likely impacts of envisaged mine and tourism developments to Mudgee, Gulgong and rural districts.
- Council undertake or commission a new detailed inventory of retail and commercial floorspace in Mudgee, and that this be extended to include Gulgong, Rylstone and Kandos.

- Council consider a policy review of future bulky goods development in the Shire. The review should place emphasis on the extent to which the adopted strategy will add value, attraction and amenity to the Mudgee CBD as the pre-eminent regional activity and service centre in the Shire and its region.
- Council consider establishing an economic strategy for the Gulgong and Rylstone areas. The strategy should identify sustainable sources of future economic growth and investment, consistent with community values and needs and environmental considerations.
- It is recommended that Council establish a development approvals monitor to ensure that future residential and commercial developments are recorded and classified by local area, to assist more accurate and detailed local area planning in the future.
- It is recommended that Council undertake a verification survey of car parking demands in the Mudgee CBD in early December 2005, so that a strict comparison with the December 1999 car parking survey can be made.

Table C: Mudgee Statistical Local Area, NSW
Estimated Existing Retail and Commercial Floorspace (June 2005)
Based on Survey by Mudgee Shire Council, December 1999, and estimates of major changes to floorspace, December 1999 – June 2005

Major Activity Type	**Locality**				
	Mudgee CBD	**Sydney Road Precinct**	**Gulgong**	**South Mudgee**	**Total**
	GLA (m^2)	**GLA (m^2)**	**GLA (m^2)**	**GLA (m^2)**	**GLA (m^2)**
Food, groceries and liquor stores	7,085	831	1,548	255	9,719
Non-food retail stores excluding bulky goods	12,418	1,140	2,378	-	15,936
Bulky goods	4,907	10,292	170	895	16,264
Total: Occupied retail goods	**24,410**	**12,263**	**4,096**	**1,150**	**41,919**
Retail and professional services	9,315	794	2,468	340	12,917
Commercial and trades floorspace	24,593	29,092	11,329	-	65,014
Vacant	1,841	2,629	803	-	5,273
Total: Retail-Commercial Floorspace	**60,159**	**44,778**	**18,696**	**1,490**	**125,123**

Appendix A. Workshop Proceedings

Appendix B. Mudgee Town Centre Visitor Survey : September 2004

Appendix C. Rylstone Town Centre Visitor Survey : September 2004

Appendix D. Gulgong Town Centre Visitor Survey : September 2004

Appendix E. Kandos Town Centre Visitor Survey : September 2004

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW

TABLE SET A

Mid-Western Regional Shire:
Forecast Retail Floorspace Requirements
(2004 – 2031)

MID-WESTERN SHIRE RETAIL REVIEW
Table A.1
Forecast Retail Floorspace Requirements (2004 - 2031)

Year / Period	Additional Floorspace Requirements (m^2 GLA)				
	Food, groceries and liquor	Household goods	Retail Services	Additional Vacant Floorspace Allowance	Total Retail Goods and Services Additional Floorspace Requirements
2004	2,740	3,180	1,330	300	7,550
2004 - 2011	1,160	5,120	1,620	330	8,230
2011 - 2021	1,840	4,140	1,030	290	7,300
2021 - 2031	2,060	4,650	2,190	370	9,270
Total : 2004 - 2031	**7,800**	**17,090**	**6,170**	**1,290**	**32,350**

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MID-WESTERN SHIRE RETAIL REVIEW
Table A.2
Comparison of Retail Floorspace Projection Requirements (1999/2000 - 2021)

Period	Additional Retail Floorspace Requirements (m^2 GLA)									
	Food, groceries and liquor		Household Goods		Retail Services		Additional Vacant Floorspace Allowance		Total Retail Goods and Services Additional Floorspace	
	Mudgee Shire (April 2000)	Mid-Western Regional Shire (February 2005)	Mudgee Shire (April 2000)	Mid-Western Regional Shire (February 2005)	Mudgee Shire (April 2000)	Mid-Western Regional Shire (February 2005)	Mudgee Shire (April 2000)	Mid-Western Regional Shire (February 2005)	Mudgee Shire (April 2000)	Mid-Western Regional Shire (February 2005)
1999 - 2011	4,250	3,900	5,400	8,300	2,960	2,950	1,050	630	13,660	15,780
2011 - 2021	2,530	1,840	5,220	4,140	2,860	1,030	440	290	11,050	7,300
Total : 1999 - 2021	**6,780**	**5,740**	**10,620**	**12,440**	**5,820**	**3,980**	**1,490**	**920**	**24,710**	**23,080**

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050215 Floorspace Reqts.xls]A.2

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW

TABLE SET B

Mid-Western Regional Shire:
Residential Development, Household & Population Statistics & Forecasts
(1991 – 2031)

Table B.1
Mid-Western Regional Shire Retail Review
Comparison of Household and Population Forecasts
Mudgee SLA
Prepared by Ratio Consultants Pty Ltd, January 2005.

Year Ended 30th June	Forecast February, 2000		Forecast ^ September, 2004		Change in Forecasts			
					Households		Resident Population	
	Households	Resident Population	Households	Resident Population	No.	%	No.	%
2001	6,920	18,930	6,720	18,350*	-200	-2.9	-580	-3.1
2006	7,610	20,300	7,140	19,090	-470	-6.2	-1,210	-6.0
2011	8,320	21,650	7,590	20,030	-730	-8.8	-1,620	-7.5
2016	9,060	22,980	8,070	21,100	-990	-10.9	-1,880	-8.2
2021	9,850	24,360	8,580	22,220	-1,270	-12.9	-2,140	-8.8
2026	No estimate made	No estimate made	9,110	23,390	Beyond initial forecast period	Beyond initial forecast period	Beyond initial forecast period	Beyond initial forecast period
2031	No estimate made	No estimate made	9,670	24,650	Beyond initial forecast period	Beyond initial forecast period	Beyond initial forecast period	Beyond initial forecast period

^ Rounded to the nearest 10 units.
* Refer ABS Publication Catalogue No. 3218.0.

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Pop & HH.xls]Comparisons

Table B.2
Mid-Western Regional Shire Retail Review
Residential and Population Historic Patterns and Projections (1991 - 2031)
Mid-Western Regional Shire
Prepared by Ratio Consultants Pty Ltd, January 2005.

Year	Total Dwelling Stock			Occupied Dwellings			Estimated Resident Population ^		
	Mudgee SLA	Rylstone SLA	Total Mid-Western Shire (Approx.)	Mudgee SLA	Rylstone SLA	Total Mid-Western Shire (Approx.)	Mudgee SLA	Rylstone SLA	Total Mid-Western Shire (Approx.)
Historic									
1991	6,893	2,024	8,917	5,810	1,624	7,434	16,853	4,531	21,384
1996	7,362	1,996	9,358	6,280	1,520	7,800	17,628	3,952	21,580
2001	7,933	2,049	9,982	6,722	1,535	8,257	18,353	3,899	22,252
Projections									
2006	8,384	2,119	10,503	7,136	1,600	8,735	19,089	3,935	23,024
2011	8,859	2,198	11,057	7,590	1,670	9,260	20,029	4,022	24,051
2016	9,358	2,286	11,644	8,070	1,749	9,819	21,098	4,137	25,235
2021	9,881	2,384	12,265	8,576	1,836	10,412	22,222	4,277	26,499
2026	10,427	2,492	12,919	9,108	1,931	11,039	23,391	4,439	27,830
2031	10,997	2,611	13,608	9,666	2,037	11,702	24,651	4,626	29,276

^ Approximately 3.5% higher than the Census population count.

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Pop & HH.xls]SUMMARY Mid-West Shire

Table B.3
Mid-Western Regional Shire Retail Review
Residential and Population Historic Patterns and Projections (1991 - 2031)
Mudgee SLA

Prepared by Ratio Consultants Pty Ltd, January 2005.

Year	Total Dwelling Stock	% Occupied Dwellings	Occupied Dwellings	Persons per Occupied Dwelling (Yield Rate) *	Estimated Resident Population ^
Historic					
1991	6,893	84.3	5,810	2.80	16,853
1996	7,362	85.3	6,280	2.71	17,628
2001	7,933	84.7	6,722	2.63	18,353**
Projections					
2006	8,384	85.1	7,136	2.59	19,089
2011	8,859	85.7	7,590	2.55	20,029
2016	9,358	86.2	8,070	2.53	21,098
2021	9,881	86.8	8,576	2.50	22,222
2026	10,427	87.3	9,108	2.48	23,391
2031	10,997	87.9	9,666	2.46	24,651

^ Estimated to be greater than the Census population count by 3.5% (historic and projected).
* Approximate
** Refer ABS Publication Catalogue No. 3218.0.

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Pop & HH.xls]Mudgee SLA 1991-2031

Table B.4
Mid-Western Regional Shire Retail Review
Residential and Population Historic Patterns and Projections (1991 - 2031)
Rylstone SLA
Prepared by Ratio Consultants Pty Ltd, January 2005.

Year	Total Dwelling Stock	% Occupied Dwellings	Occupied Dwellings	Persons per Occupied Dwelling (Yield Rate) *	Estimated Resident Population ^
Historic					
1991	2,024	80.2	1,624	2.79	4,531
1996	1,996	76.2	1,520	2.60	3,952
2001	2,049	74.9	1,535	2.54	3,899
Projections					
2006	2,119	75.5	1,600	2.46	3,935
2011	2,198	76.0	1,670	2.41	4,022
2016	2,286	76.5	1,749	2.37	4,137
2021	2,384	77.0	1,836	2.33	4,277
2026	2,492	77.5	1,931	2.30	4,439
2031	2,611	78.0	2,037	2.27	4,626

* Approximate.
^ Estimated to be greater than the Census population count by 3.5%.

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Pop & HH.xls]Rylstone SLA 1991-2031

Table B.5
Mid-Western Regional Shire Retail Review
Dwelling Unit Approvals : Historic Trends and Projections (2001/02 - 2031/31)
Prepared by Ratio Consultants Pty Ltd, January 2005.

SLA	30th June 2001 (Census) Total Dwelling Stock	2001/02 - 2005/06			30th June 2006 Projected Total Dwelling Stock	2006/07 - 2010/11			30th June 2011 Projected Total Dwelling Stock	2011/12 - 2015/16			30th June 2016 Projected Total Dwelling Stock	2016/17 - 2020/21			30th June 2021 Projected Total Dwelling Stock	2021/22 - 2025/26			30th June 2026 Projected Total Dwelling Stock	2026/27 - 2030/31			30th June 2031 Projected Total Dwelling Stock
		Projected Dwelling Unit Approvals	Estimated Proportion of Dwelling Unit Approvals Accruing to Total Dwelling Stock	Additional Total Dwelling Stock		Projected Dwelling Unit Approvals	Estimated Proportion of Dwelling Unit Approvals Accruing to Total Dwelling Stock	Additional Total Dwelling Stock		Projected Dwelling Unit Approvals	Estimated Proportion of Dwelling Unit Approvals Accruing to Total Dwelling Stock	Additional Total Dwelling Stock		Projected Dwelling Unit Approvals	Estimated Proportion of Dwelling Unit Approvals Accruing to Total Dwelling Stock	Additional Total Dwelling Stock		Projected Dwelling Unit Approvals	Estimated Proportion of Dwelling Unit Approvals Accruing to Total Dwelling Stock	Additional Total Dwelling Stock		Projected Dwelling Unit Approvals	Estimated Proportion of Dwelling Unit Approvals Accruing to Total Dwelling Stock	Additional Total Dwelling Stock	
	No.	No.	%	No.	No.	No.	%	No.	No.	No.	%	No.	No.	No.	%	No.	No.	No.	%	No.	No.	No.	%	No.	No.
Mudgee	7,933	475	95.0	451	8,384	500	95.0	475	8,859	525	95.0	499	9,358	550	95.0	523	9,881	575	95.0	546	10,427	600	95.0	570	10,997
Rylstone	2,049	100	70.0	70	2,119	105	75.0	79	2,198	110	80.0	88	2,286	115	85.0	98	2,384	120	90.0	108	2,492	125	95.0	119	2,611
Total: Mid-Western Regional Shire (Approx.)	**9,982**	**575**	**No estimate made**	**521**	**10,503**	**605**	**No estimate made**	**554**	**11,057**	**635**	**No estimate made**	**587**	**11,644**	**665**	**No estimate made**	**621**	**12,265**	**695**	**No estimate made**	**654**	**12,919**	**725**	**No estimate made**	**689**	**13,608**

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Dwellings.xls]TDS Projections

Table B.6
Mid-Western Regional Shire Retail Review
Reconciliation of Dwelling Unit Approvals and Net Change in Total Dwelling Stock (1996-2001)

SLA	Dwelling Units Approved 1st July 1996 - 30 June 2001	Total Dwelling Stock		Net Change in Total Dwelling Stock	Net Change in Total Dwelling Stock / Dwelling Units Approved 1996-2001
	No.	Census 2001	Census 1996	1996-2001	%
Mudgee	600	7,933	7,362	571	95.2
Rylstone	80	2,049	1,996	53	66.3
TOTAL	**680**	**9,982**	**9,358**	**624**	**No calculation made**

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Dwellings.xls]Recon 1996-2001

Table B.7
Mid-Western Regional Shire Retail Review
Mudgee and Rylstone Statistical Local Areas: Dwelling Unit Approvals (1995/96 - 2003/04)

Year ended 30th June	Mudgee	Rylstone	Total: Mudgee and Rylstone
1996	71	17	88
1997	124	17	141
1998	106	17	123
1999	104	14	118
2000	181	18	199
2001	85	14	99
2002	105	13	118
2003	72	20	92
2004	102	23	125
Average 1995/96 - 2003-04	**105.6**	**17.0**	**122.6**

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Dwellings.xls]Approvals by yr

Table B.8
Mid-Western Regional Shire Retail Review
Mudgee and Rylstone Statistical Local Areas
Historic and Projected Dwelling Unit Approvals (2001-2031)

Five year period ended 30th June	Mudgee Statistical Local Area		Rylstone Statistical Local Area	
	Average Dwelling Completions / Annum No.	Historic and Projected Dwelling Unit Completions per Five Year Period No.	Average Dwelling Completions / Annum No.	Historic and Projected Dwelling Unit Completions per Five Year Period No.
1996 - 2001	93	465	19	95
2001 - 2006	95	475	20	100
2006 - 2011	100	500	21	105
2011 - 2016	105	525	22	110
2016 - 2021	110	550	23	115
2021 - 2026	115	575	24	120
2026 - 2031	120	600	25	125

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Dwellings.xls]Approvals 2001-2031

Table B.9
Mid-Western Regional Shire Retail Review
Mudgee and Rylstone Statistical Local Areas: Dwelling Unit Approvals Three-Year Average

Three year period ended 30th June	Mudgee	Rylstone	Total: Mudgee and Rylstone
1996 - 1999	100.3	17.0	117.3
1999 - 2002	123.3	15.3	138.7
2002 - 2005	93.0	18.7	111.7

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Dwellings.xls]Approvals by 3-yr average

Table B.10
Mid-Western Regional Shire Retail Review
Mudgee SLA
Historic and Projected Population and Households (1991 - 2031) ^^

Urban Centre / Locality	Total Dwelling Stock								
	Historic			Projected					
	1991	1996	2001	2006	2011	2016	2021	2026	2031
Mudgee Township	2,840	3,260	3,610	3,880	4,170	4,480	4,800	5,130	5,480
Gulgong Township	570	830	850	860	870	880	900	910	930
Rural Balance	3,490	3,270	3,480	3,640	3,820	4,000	4,190	4,390	4,600
Total	**6,900**	**7,360**	**7,940**	**8,380**	**8,860**	**9,360**	**9,890**	**10,430**	**11,010**

Urban Centre / Locality	% Occupied Dwellings								
	Historic			Projected					
	1991	1996	2001	2006	2011	2016	2021	2026	2031
Mudgee Township	91.2	93.3	91.6	92.0	92.5	93.0	93.5	94.0	94.5
Gulgong Township	87.8	91.7	90.4	90.5	91.0	91.5	92.0	92.5	93.0
Rural Balance	78.1	75.7	76.3	76.5	77.0	77.5	78.0	78.5	79.0
Total	**84.3**	**85.3**	**84.7**	**85.1**	**85.7**	**86.2**	**86.8**	**87.3**	**87.9**

Urban Centre / Locality	Occupied Dwellings								
	Historic			Projected					
	1991	1996	2001	2006	2011	2016	2021	2026	2031
Mudgee Township	2,590	3,040	3,300	3,570	3,860	4,160	4,480	4,820	5,170
Gulgong Township	500	760	760	780	790	810	820	840	860
Rural Balance	2,720	2,480	2,650	2,790	2,940	3,100	3,270	3,440	3,630
Total	**5,810**	**6,280**	**6,710**	**7,140**	**7,590**	**8,070**	**8,570**	**9,100**	**9,660**

Urban Centre / Locality	Persons Per Occupied Dwellings (Yield Rate)								
	Historic			Projected					
	1991	1996	2001	2006	2011	2016	2021	2026	2031
Mudgee Township	2.76	2.69	2.60	2.57	2.54	2.52	2.50	2.48	2.46
Gulgong Township	3.00	2.65	2.64	2.49	2.41	2.35	2.30	2.25	2.21
Rural Balance	2.81	2.76	2.65	2.63	2.60	2.58	2.56	2.54	2.53
Total	**2.80**	**2.71**	**2.63**	**2.59**	**2.55**	**2.53**	**2.50**	**2.48**	**2.46**

Urban Centre / Locality	Estimated Resident Population ^								
	Historic			Projected					
	1991	1996	2001	2006	2011	2016	2021	2026	2031
Mudgee Township	7,390	8,460	8,940	9,500	10,150	10,860	11,600	12,370	13,170
Gulgong Township	1,560	2,090	2,100	2,000	1,970	1,960	1,960	1,960	1,970
Rural Balance	7,910	7,080	7,310	7,590	7,910	8,280	8,660	9,060	9,510
Total	**16,860**	**17,630**	**18,350***	**19,090**	**20,030**	**21,100**	**22,220**	**23,390**	**24,650**

* Refer ABS Publication No. 3218.0
^ Rounded to the nearest 10 units. Approximately 3.5% higher than the Population Census count.
^^ Where applicable, rounded to the nearest 10 units. Note, any discrepancies between totals and sums of components in the tables are due to rounding.

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Component Areas.xls]Mudgee Summary_CD Based_RND

Table B.11
Mid-Western Regional Shire Retail Review
Mudgee LGA
Historic Residential and Population Statistics

Source: ABS Census of Population & Housing, 1991, 1996 & 2001.

Urban Centre / Locality	Total Dwelling Stock			Occupied Dwellings			Resident Population *			% Occupied Dwellings		
	1991	1996	2001	1991	1996	2001	1991	1996	2001	1991	1996	2001
Mudgee Township	2,835	3,260	3,608	2,585	3,042	3,304	7,137	8,174	8,601	91.2	93.3	91.6
Gulgong Township	572	830	845	502	761	764	1,507	2,018	2,018	87.8	91.7	90.4
Rural Balance	3,486	3,272	3,480	2,723	2,477	2,654	7,639	6,840	7,033	78.1	75.7	76.3
Total	**6,893**	**7,362**	**7,933**	**5,810**	**6,280**	**6,722**	**16,283**	**17,032**	**17,652**	**84.3**	**85.3**	**84.7**

* N.B. Figures quoted as Estimated Resident Population (ERP) in other tables may differ from those presented here. ERP values are approximately 3.5% higher than the Population Census count, which is what these values represent.

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Pop & HH.xls]Mudgee LGA

Table B.12
Mid-Western Regional Shire Retail Review
Rylstone LGA
Historic Residential and Population Statistics
Source: ABS Census of Population & Housing, 1991, 1996 & 2001.

Urban Centre / Locality	**Total Dwelling Stock**			**Occupied Dwellings**			**Resident Population ^**			**% Occupied Dwellings**		
	1991	**1996**	**2001**	**1991**	**1996**	**2001**	**1991**	**1996**	**2001**	**1991**	**1996**	**2001**
Rylstone Township	78	325	315	52	290	260	135	723	651	66.7	89.2	82.5
Kandos Township	474	670	676	405	581	586	1,062	1,439	1,336	85.4	86.7	86.7
Rural Balance	1,472	1,001	1,058	1,167	649	689	3,127	1,566	1,666	79.3	64.8	65.1
Total	**2,024**	**1,996**	**2,049**	**1,624**	**1,520**	**1,535**	**4,324**	**3,728**	**3,653**	**80.2**	**76.2**	**74.9**
Total *	***1,623***	***1,754***	***1,816***	***1,290***	***1,378***	***1,387***	***3,468***	***3,418***	***3,300***	***79.5***	***78.6***	***76.4***

* Excludes Rylstone CDs not included in the new Mid-Western Shire.

^ N.B. Figures quoted as Estimated Resident Population (ERP) in other tables may differ from those presented here. ERP values are approximately 3.5% higher than the Population Census count, which is what these values represent.

Table B.13
Mid-Western Regional Shire Retail Review
Former Mudgee Shire Area : Analysis and Projection of Residential Development and Population by Component Area (2001 - 2031)
Prepared by Ratio Consultants Pty Ltd, January 2005.

Urban Centre / Locality	Net Change in Dwelling Stock 1996-2001		Housing Stock 2001 Census	2001/02 - 2005/06 Projected Net Additions to Total Dwelling Stock (refer Table B.5)	30th June 2006 Total Dwelling Stock	2006/07 - 2010/11 Projected Net Additions to Total Dwelling Stock (refer Table B.5)	30th June 2011 Total Dwelling Stock	2011/12 - 2015/16 Projected Net Additions to Total Dwelling Stock (refer Table B.5)	30th June 2016 Total Dwelling Stock	2016/17 - 2020/21 Projected Net Additions to Total Dwelling Stock (refer Table B.5)	30th June 2021 Total Dwelling Stock	2021/22 - 2025/26 Projected Net Additions to Total Dwelling Stock (refer Table B.5)	30th June 2026 Total Dwelling Stock	2026/27 - 2030/31 Projected Net Additions to Total Dwelling Stock (refer Table B.5)	30th June 2031 Total Dwelling Stock
	No.	%													
Mudgee Township	348	60.9	3,608	275	3,883	289	4,172	304	4,476	319	4,795	333	5,128	347	5,475
Gulgong Township	15	2.6	845	12	857	12	869	13	882	14	896	14	911	15	925
Rural Balance	208	36.4	3,480	164	3,644	173	3,817	182	3,999	191	4,190	199	4,388	208	4,596
Total	**571**	**100.00**	**7,933**	**451**	**8,384**	**475**	**8,859**	**499**	**9,358**	**523**	**9,881**	**546**	**10,427**	**570**	**10,997**

F:\Projects\6000\6205 Mudgee Retail Review\Data\Statistics\Revised Projections\[6205 20050120 Component Areas.xls]Mudgee

Table C
Mudgee Statistical Local Area, NSW
Estimated Existing Retail and Commercial Floorspace (June 2005)
Based on Survey by Mudgee Shire Council, December 1999, and estimates of major changes to floorspace, December 1999 - June 2005

Major Activity Type	Locality				
	Mudgee CBD	Sydney Road Precinct	Gulgong	South Mudgee	Total
	GLA (m^2)	GLA (m^2)	GLA (m^2)	GLA (m^2)	GLA (m^2)
Food, groceries and liquor stores	7,085	831	1,548	255	9,719
Non-food retail stores excluding bulky goods	12,418	1,140	2,378	-	15,936
Bulky goods	4,907	10,292	170	895	16,264
Total: Occupied retail goods	**24,410**	**12,263**	**4,096**	**1,150**	**41,919**
Retail and professional services	9,315	794	2,468	340	12,917
Commercial and trades floorspace	24,593	29,092	11,329	-	65,014
Vacant	1,841	2,629	803	-	5,273
Total: Retail-Commercial Floorspace	**60,159**	**44,778**	**18,696**	**1,490**	**125,123**

G:\Projects\6000\6205 Mudgee Retail Review\Data\Floorspace\[6205 050809 Retail & Commercial Flrsp.xls]Summary

Table P.1 (cont'd)
Mudgee CBD Car Parking Survey
(16th June 2005)

Car Park		Type			Capacity	Occupancy	
			Off-Street				
Identification No. (refer Figure xx)	Location	On-Street	Public Access	Private	No. Spaces	No. Spaces	%
27	Church Street (Mortimer-Gladstone, east side)	✔			29	15	51.7
28	Church Street (Mortimer-Gladstone, west side)	✔			35	28	80.0
29	Church Street (Gladstone-Denison, east side)	✔			28	15	53.6
30	Church Street (Gladstone-Denison, west side)	✔			38	18	47.4
31	Bi-Lo Carpark		✔		97	85	87.6
32	Church Street (Short-Market, east side)	✔			18	11	61.1
33	Church Street (Short-Market, west side)	✔			22	15	68.2
34	Church Street (Market-Mortimer, east side)	✔			41	35	85.4
35	Church Street (Market-Mortimer, west side)	✔			46	40	87.0
36	Lewis Street (north of Mortimer)	✔			10	5	50.0
37	Lewis Street (Gladstone-Mortimer, east side)	✔			31	23	74.2
38	Lewis Street (Gladstone-Mortimer, west side)	✔			23	14	60.9
39	Market Street (Church-Lewis, south side)	✔			39	27	69.2
40	Market Street (Church-Lewis, north side)	✔			41	21	51.2
41	Mitre 10 Car Park		✔		30	8	26.7
42	Mortimer Street Car Park		✔		32	16	50.0
	TOTAL				**1,600**	**1,154**	**72.1**

G:\Projects\6000\6205 Mudgee Retail Review\Data\Carparking Survey\[6205 050804 Mudgee CBD Parking Survey16.06.05.xls]16 June '05_2of2

Table P.1
Mudgee CBD Car Parking Survey
(16th June 2005)

Car Park		Type			Capacity	Occupancy	
			Off-Street				
Identification No. (refer Figure xx)	Location	On-Street	Public Access	Private	No. Spaces	No. Spaces	%
1	Byron Place		✔		133	145	109.0
2	Byron Place North		✔		68	64	94.1
3	Market Street (Church-Perry, South Side)	✔			43	43	100.0
4	Market Street (Church-Perry, North Side)	✔			38	37	97.4
5	Perry Street (north of Market, west side)				14	13	92.9
6	Woolworths Big W (front car park)		✔		72	47	65.3
7	Woolworths Big W (rear car park between Short Street and Library)		✔		33	29	87.9
8	East side of Library lane			✔	13	10	76.9
9	Lovejoy Street (west of Byron Place, over Perry Street)	✔			33	29	87.9
10	Perry Street (Market-Mortimer, east side)	✔			34	28	82.4
11	Perry Street (Market-Mortimer, west side)	✔			29	22	75.9
12	Short Street (Perry-Church, north side)	✔			48	41	85.4
13	Short Street (Perry-Church, south side)	✔			23	22	95.7
14	Rear of Post Office (off Short Street)		✔		64	17	26.6
15	Short Street (Church-Lewis, north side)	✔			27	13	48.1
16	Perry Street (Mortimer-Gladstone, east side)	✔			28	12	42.9
17	Perry Street (Mortimer-Gladstone, west side)	✔			41	22	53.7
18	RSL Car Park (off Perry Street, south of Mortimer)		✔		96	29	30.2
19	Mortimer Street (west of Perry to mid-block, north side)	✔			17	10	58.8
20	Mortimer Street (west of Perry to mid-block, south side)	✔			15	11	73.3
21	Mortimer Street (Perry-Church, north side)	✔			33	32	97.0
22	Mortimer Street (Perry-Church, south side)	✔			41	38	92.7
23	Mortimer Centre (on north side of Mortimer St at south western end of Woolworths Supermarket)		✔		14	13	92.9
24	Millers/ Go-Lo		✔		14	14	100.0
25	Mortimer Street (Church-Lewis, north side)	✔			27	13	48.2
26	Mortimer Street (Church-Lewis, south side)	✔			42	24	57.1

Table P.2
Mid-Western Regional Council Retail Review
Updated Assessment of Mid-Winter Peak Car Parking Demands in Relation to Retail Shop Floorspace
(16th June 2005)

Item No.	Description	Unit
1	Occupied retail goods floorspace in the Mudgee CBD (December 1999) Food and non-food retail goods stores m^2 GLA	21,966
2	Net additional retail goods floorspace in the Mudgee CBD (December 1999) m^2 GLA	2,444
3	Estimated occupied retail goods floorspace in the Mudgee CBD m^2 GLA	24,410
4	Mudgee CBD. Current supply of publicly accessible car spaces (June 2005) Note that this total excludes certain peripheral locations (Lewis Street and Mortimer Street, west of Perry Street). It also excludes private car parking.	1,491
5	Mudgee CBD. Peak utilisation of car spaces. No. of car parking spaces occupied. Excludes Lewis Street and Mortimer Street, west of Perry Street together with private parking areas. % car parking spaces occupied	1,081 72.5
6	Mudgee CBD. Estimated retail gross floor area. Item 3 x 1.053 m^2 GFA	25,700
7	Estimated proportion of car parking demands attributable to shopping demands (refer Appendix B, Table Q5) % shopping demands (based on Mudgee CBD In-Centre Survey, September 2004)	82
8	Mudgee CBD. Peak car parking demands directly attributable to shopping demands Item 5 x Item 7	886
9	Mudgee CBD. Peak mid-winter car parking demands attributable to shop floorspace Item 8 / (Item 6/100) Rate of car parking demand per $100m^2$ GFA of occupied shop floorspace	3.45
10	Estimated pre-Christmas peak parking demands (subject to varification survey) Item 9 x 1.053	3.65
11	Desirable car parking rate of provision for shop use (Mudgee LEP) Car spaces / $100m^2$ GFA	3.33
12	Current car parking deficiency (based on current conditions and forward estimates to December 2005) Item 10 - Item 11 x (Item 6 / 100)	82

G:\Projects\6000\6205 Mudgee Retail Review\Data\Carparking Survey\[6205 050804 Mudgee CBD Parking Survey16.06.05.xls]Updated Assessment

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW

APPENDIX A

Workshop Proceedings

MID WESTERN REGIONAL COUNCIL

RETAIL STRATEGY REVIEW (2004-2031)

Workshop with Mudgee Business Association
(Tuesday 7 September 2004)

Attendees:	**James Warren**	**(2½ years in Mudgee, from Penrith)**
	Michelle Gunton	**(7 years in Mudgee, From Rose Hill, Syd)**
	Paul Hairs	**(6 months, lived everywhere, love it)**
	Helen Evans	**(Born and bred, back this time 18 mths)**
	Laura Miller	**(Born in Gulgong, 2 years this time)**
	Debbie Pincomb	**(8½ yrs this time, 2½ yrs in early 80s)**
	Scott Etherington	**(born in Mudgee, 12 years)**

Summary of Workshop Proceedings

MUDGEE CBD

Key Strengths

- Compact at pedestrian peak (easy to get from point to point).
- No empty shops
- Prosperous Town
  - no vacancies
  - no of franchises in Mudgee
- Diversified economy.
- Many access points to the CBD.
- Visually attractive
  - Main Churches
  - Main streets.
- This supports tourism.
- Tourism underlies a lot of the economic strength in Mudgee.
- Relatively remote from competing regional cities.

Weaknesses

- Lack of parking within the core area (Market and Church Streets). Within the broader CBD area there is adequate parking.
  - Long Term
  - Short Term
- No buildings available for lease.
- There may be restrictions as to the size the CBD can grow (limited on 3 sides).
- Problem with delivery trucks in Byron Place.
- Heritage value of some of the buildings – may restrict redevelopment.

Opportunities

- Opportunity for a covered mall (enclosed shopping centre).
- Would rather not see it.
- Look at future for serviced offices.
- Potential for an entertainment centre – cinema centre.
- Moving service stations away from the CBD.
- Mudgee as a retirement centre.

Changes in Mudgee

- National chains.
- Family stores have left.
- CBD is becoming more nationally generic.

Threats

- Better access to regional cities.
- Traffic lights – would kill the feel of a country town.
- Larger enclosed mall would also kill the feel of a country town.
- Small mindedness of some of the officers.

Trend in Mudgee for private homes to be acquired for offices.

People travel from Mudgee to Dubbo for the cinema.

Optimal Future for Mudgee CBD

1. Regional centre:
   - Implication for Government services and professional services (Business Enterprise links).
2. Need to look at Sporting Facilities.
3. Need for higher quality medical services – have medical centres.
4. Better publicized public transport network.
5. Inter-connected cycleway/pathway system.
6. Better street lighting (Mudgee generally).
7. Encourage the development of new attractors just outside the CBD.
8. Potential for a "showcase" of the products, arts and crafts of the region.

Large number of b & bs in Mudgee – 1,000 beds.

Want Mudgee to remain as a country town – don't have and don't want traffic lights.

Difference between a country town and regional city.

Downside – don't have the range of services.

Upside – the pace of life is more relaxed
- lower level of crime

Mudgee's strength is its economic diversity.

Mudgee has to maintain its diversity. Look at cash flow of different sectors.

MID WESTERN REGIONAL COUNCIL

RETAIL STRATEGY REVIEW (2004-2031)

Workshop with Cudgegong Business Group
(Thursday 9 September 2004)

In Attendance:	**Alan Jackson**	**(Kandos)**
	Ian Pandelis	**(Rylstone, 2 years)**
	Warren Roberts	**(Kandos, 16 years)**
	Jane Beckinsale	**(Kandos, 2 years)**
	Leslie McCarthy	**(Rylstone, 10 years)**
	Dianne Muedey	**(40 years, 2 towns)**
	Lily Hoffman	**(Kandos, 3 months)**
	Hank Hofman	**(Kandos, 3 months)**
	Sue Marshall	**(Rylstone, 10 years)**
	Natalie Everton	**(Kandos, 9 yrs, Rylstone 2 years)**
	Pyogo Cornalissen	**(Rylstone, 7 years)**
	Peter Marchant	**(Rylstone, 15 years p.t.)**

Summary of Workshop Proceedings

RYLSTONE

Strengths

- Ambience of the main street / village feel.
- Farmer’s town.
- Produce store.
- The main street is also a thoroughfare (access is easy – but maybe a drawback for heavy vehicle traffic).
- A recognized tourist destination.
- The name had “brand” value.

KANDOS

Strengths

- Parks and public toilets.
- Lot of sporting and recreation facilities – sporting facilities, golf course, footballs ovals.
- Town has a nice entrance.

RYLSTONE

Weaknesses

- Lack of amenities:
  - toilets are locked;
  - No signage.
  - poorly maintained.
- Not a lot of scope for more development:
  - Jim Jamieson owns a number of sites. Won't sell and won't improve them.
- Population ageing.
- Medical facilities are not keeping pace with the population.

No transport between the two towns.

KANDOS

Weaknesses

- Main street – wide barren street:
  - garden beds
  - needs softening.
- Angus Ave is a very long street – two separate shopping areas.
- Community Hall – needs upgrading, impractical.
- Poor signage.
- The main street is not a through-route.
- Population ageing.

No transport between the two towns.

RYLSTONE

Opportunities

- Needs a quality tourist motel.
- Have lots of b & b's.
- Don't have an up-to-date list of accommodation.
- Bridge View Inn – not fully utilized.
    - did have tourist information.

There is at present no central place for tourist information.

KANDOS

Opportunities

- Fixing up the main street.
- Fix up the community hall.

Background Conditions

1. Tourism is improving – growing potential.
2. But nothing there to buy in terms of land.
3. 3 - 3½ hours away from Sydney.
4. Potential for retreat properties.
5. Mudgee is placed as a tourist destination, but Rylstone and Kandos should be marketed as complete/integral destinations.
6. There is activity in the main street of Rylstone.
7. Both towns have events that draw huge crowds – want support of Council.
8. Rylstone's real economic potential lies **outside** of Rylstone.

Background Information

1. For Rylstone and Kandos, very few vacant houses.
2. At Rathdownie, a number of houses – 10-12 houses over last two years.
3. A couple of vacant building blocks.
4. Not enough builders to cater for Rylstone and Kandos.
5. If land was available and builders available, there would be potential.

Stores required:

1. Chemist – Rylstone (there is a chemist at Kandos).
2. Clothes shops.

Two doctors share the two towns, have no dentist and no optometrist.

Catchment

1. Extends to Ilford.

Council and Other Facilities

1. Shire office in Rylstone.
2. Outdoor pool in Kandos.
3. Library in Kandos.
4. Sports fields in Kandos.
5. Showgrounds in Rylstone.
6. Out-of-hours school care (Kandos.
7. Hospital n Rylstone (Mid Western Regional Hospital).
8. Club in Rylstone.
9. 2 Clubs in Kandos.
10. Squash courts in Rylstone.
11. Tennis courts and basketball courts in Rylstone and Kandos.

Ideas for Improvements

1. Blocks released for residential and commercial development.
2. Would like to see the power undergrounded in Angus Avenue.
3. Want to see the entrances to both towns improved with quality signage.
4. Want Bylong Valley Way asphalted – runs north to Muswelbrook. This route then connects to Newcastle. New north-south route.
5. Promote the golf course in Kandos.
6. A tourist information centre in Rylstone. A quality development.
7. Look at the industrial development potential in the area.
8. Focus on attractive place making:
   - Quality signage and lighting
   - Cleaning up sites
   - Tidy up the place
   - Toilet and amenities
   - Seating and footpaths
9. Improve and promote the camping area.
10. Need for a combined business/tourism officer for Rylstone and Kandos. Ideally someone who is local.

- Greatest strength is the local community.
- Must promote the local community.
- Links to the outside world.
- Promote as a unique destination.
- A small quality community.

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW

APPENDIX B

Mudgee Town Centre Visitor Survey
September 2004

Interviewer No.: ________ Survey No.: ________

MUDGEE TOWN CENTRE VISITOR SURVEY
Mid Western Regional Shire Council

September ________ 2004

Good morning/afternoon, we are undertaking a survey for the Mudgee Shire. May I ask you a few questions? (please tick the appropriate box).

Time interview am/pm ________ Location number (refer map reference) ________

Sex: Male ☐ Female ☐

1. Could you please indicate where you live?

☐ Mudgee Township ☐ Bombira / Putta Bucca

☐ Gulgong ☐ Dunedoo

☐ Rylestone ☐ Coolah

☐ Kandos Other (please indicate) :

________________ Postcode ________

2. How did you travel to the Mudgee Central Business District today? (please tick)

☐ Car as Driver ☐ Bus ☐ Taxi ☐ Other

☐ Car as Passenger ☐ Bicycle ☐ Walk

3. What is your intended length of stay in the Mudgee CBD?

Less than 1 hour ☐ 1-2 Hours ☐ 2-3 Hours ☐ 3-4 Hours ☐

More than 4 hours ☐

4. Approximately how frequently do you visit the Mudgee CBD for any purpose?

☐ Daily / Several times a week ☐ Approximately weekly ☐ Fortnightly

☐ Monthly ☐ Hardly ever

5. What activities are you undertaking in the Mudgee CBD today? (you may tick more than

one response)

☐ Shopping ☐ Personal Services (hairdresser, banking, dry cleaning etc) ☐ Medical and professional services

☐ Work Education

☐ Recreation, leisure, entertainment (eg cinema, restaurant, bowling etc)

☐ Other please specifiy ______________________________

____

6. What stores or other facilities will you be visiting today in the Mudgee CBD? (You may tick more than one box).

☐ Woolworths supermarket ☐ Bank ☐ Furniture / Electrical

☐ Fosseys ☐ Newsagent ☐ Other (please specify)

☐ Bi Lo ☐ Chemist ______________

☐ Greengrocer ☐ Hardware ______________

☐ Post office ☐ Library

7. What new / better shops and / or services would you like to see in the Mudgee CBD?

____

____

8. What other improvements would you like to see in the centre / surrounding area?

____

____

____

9. Within the last two years, at what stores / locations have you purchased household appliances, furniture, and furnishings?

____

____

10. Within the last year, at what stores / locations have you purchased footwear and clothing?

____

____

11. To what age group do you belong?

☐ Under 18 years ☐ 19 - 29 years ☐ 30 - 39 years

☐ 40 - 59 years ☐ 60+ years

12. What Cities or Towns have you Visited in the Past 12 Months. Tick relevant boxes.

City of Town	Have Not Visited	Have Visited Primary Purpose					
		Sporting	Social	Shopping	Medical	Professional Services	Other
Bathurst							
Dubbo							
Orange							
Western Sydney (Parramatta / Penrith)							
Other Sydney							
Other Cities Towns Please Indicate							

Thank you for your co-operation

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Gender

Gender	No.	%
Females	220	62.9
Males	130	37.1
Total Valid Responses	**350**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q1. Could you please indicate where you live?

Place of Residence	Postcode	No.	%
Mid-Western Region			
Mudgee Township	2850	227	65.0
Gulgong	2852	22	6.3
Rylstone	2849	7	2.0
Cooyal	2850	6	1.7
Grattai	2850	6	1.7
Cooks Gap	2850	5	1.4
Hargraves	2850	5	1.4
Lue	2850	5	1.4
Kandos	2848	4	1.1
Frog Rock	2850	4	1.1
Dubbo	2830	3	0.9
Coolah	2843	3	0.9
Bombira/ Putta Bucca	2850	3	0.9
Wollar	2850	3	0.9
Windeyer	2850	3	0.9
Dunedoo	2844	2	0.6
Botobolar	2850	2	0.6
Piambong	2850	2	0.6
Wellington	2820	1	0.3
Leadville	2844	1	0.3
Bocoble	2850	1	0.3
Budgee Budgee	2850	1	0.3
Carcalgong	2850	1	0.3
Collingwood	2850	1	0.3
Eurundee	2850	1	0.3
Havilah	2850	1	0.3
Home Rule	2850	1	0.3
Ilford	2850	1	0.3
Menah	2850	1	0.3
Riverlea	2850	1	0.3
Running Stream	2850	1	0.3
Spring Flat	2850	1	0.3
Totnes Valley	2850	1	0.3
Turill	2850	1	0.3
Yarrawonga	2850	1	0.3
Bexhill	2852	1	0.3
Two Mile Flat	2852	1	0.3
Sub-total Mid-Western Region		**331**	**94.8**
Central West Region			
Clandulla	2848	1	0.3
Glen Alice	2849	1	0.3
West Wyalong	2671	1	0.3
Sub-total Central West Region		**3**	**0.9**
South Eastern Region			
Bermagui	2546	1	0.3
Hill End	2580	1	0.3
Sub-total South Eastern Region		**2**	**0.6**
Metropolitan Sydney			
Sydney	2000	2	0.6
Point Piper	2027	1	0.3
Berowa Heights	2082	1	0.3
Neutral Bay	2089	1	0.3
Elanora Heights	2101	1	0.3
Parramatta	2151	1	0.3
Sub-total Metropolitan Sydney		**7**	**2.0**
Interstate			
Queensland		2	0.6
Victoria		1	0.3
Tasmania		1	0.3
Sub-total Interstate		**4**	**1.1**
Overseas		**1**	**0.3**
Other		**1**	**0.3**
Total Valid Responses		**349**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q2. How did you travel to the Mudgee Central Business District today?

Mode of Travel	No.	%
Car as Driver	228	65.0
Car as Passenger	51	14.5
Walk	43	12.3
Taxi	12	3.4
Bus	10	2.8
Bicycle	1	0.3
Other	6	1.7
Total Valid Responses ^	**351**	**100.0**

^ Exceeds sample survey of n = 350 as some surveys included 2 people (e.g. couples)

Q3. What is your intended length of stay in the Mudgee CBD?

Length of Stay	No.	%
Less than 1 hour	96	27.5
1-2 hours	92	26.4
2-3 hours	59	16.9
3-4 hours	29	8.3
More than 4 hours	73	20.9
Total Valid Responses	**349**	**100.0**

Q4. Approximately how frequently do you visit the Mudgee CBD for any purpose?

Purpose of Visit	No.	%
Daily/ Several Times a Week	231	66.4
Approx Weekly	83	23.9
Fortnightly	18	5.2
Monthly	6	1.7
Hardly Ever/ First Time	10	2.9
Total Valid Responses	**348**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q5. What activities are you undertaking in the Mudgee CBD today? (More than one response permitted)

Activity	No.	%
Shopping	**288**	**43.7**
Personal Services	**143**	**21.7**
Recreation, leisure & entertainment		
Recreation, leisure & entertainment	88	13.4
Tourist	2	0.3
Sub-total Recreation, leisure & entertainment	**90**	**13.7**
Work	**68**	**10.3**
Medical & Professional Services	**50**	**7.6**
Education	**6**	**0.9**
Other		
Library	4	0.6
Drop off (driver)	2	0.3
Buying a car	1	0.2
Car service	1	0.2
Funeral	1	0.2
House hunting	1	0.2
Meeting	1	0.2
Pick kids up from school	1	0.2
Visit relatives	1	0.2
Volunteer	1	0.2
Sub-total Other	**14**	**2.1**
Total Valid Responses	**659**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q6. What stores or other facilities will you be visiting today in the Mudgee CBD? (More than one response permitted)

Store / Facility	Responses		Respondents
	No.	%	%
Supermarket			
Woolworths Supermarket	191	17.9	54.6
Bi-Lo	138	12.9	39.4
Sub-total Supermarket	**329**	**30.7**	**94.0**
Retail Commercial Services			
Bank	160	15.0	45.7
Post Office	86	8.0	24.6
Sub-total Retail Commercial Services	**246**	**23.0**	**70.3**
Household Stores			
Newsagent	92	8.6	26.3
Chemist	76	7.1	21.7
Hardware	32	3.0	9.1
Toy shop	5	0.5	1.4
Jewellery	3	0.3	0.9
Gift shop	2	0.2	0.6
Reject Shop	2	0.2	0.6
Camera shop	1	0.1	0.3
Cosmetic & toiletry	1	0.1	0.3
Houseware	1	0.1	0.3
Sub-total Household Stores	**215**	**20.1**	**61.4**
Discount Department Store			
Target	30	2.8	8.6
Fosseys	24	2.2	6.9
Best & Less	22	2.1	6.3
Go-lo	6	0.6	1.7
Sub-total Discount Department Store	**82**	**7.7**	**23.4**
Recreation, Leisure & Entertainment			
Library	31	2.9	8.9
Bookshop	10	0.9	2.9
Club	3	0.3	0.9
Craft shop	2	0.2	0.6
Blockbuster Video	2	0.2	0.6
Music store	1	0.1	0.3
Sports club	1	0.1	0.3
Wineries	1	0.1	0.3
Sub-total Recreation, Leisure & Entertainment	**51**	**4.8**	**14.6**
Food, Groceries & Liquor Stores			
Café	15	1.4	4.3
Butcher	10	0.9	2.9
Bakery	6	0.6	1.7
Subway	5	0.5	1.4
Restaurant	2	0.2	0.6
Confectionery	1	0.1	0.3
Deli	1	0.1	0.3
Produce	1	0.1	0.3
Takeaway	1	0.1	0.3
Sub-total Food, Groceries & Liquor Stores	**42**	**3.9**	**12.0**
Clothing & Footwear			
Clothing	11	1.0	3.1
Rivers	6	0.6	1.7
Footwear	4	0.4	1.1
Sub-total Clothing & Footwear	**21**	**2.0**	**6.0**
Furniture/ Electrical			
Furniture/ Electrical	12	1.1	3.4
Furniture & furnishings	4	0.4	1.1
Dick Smith	1	0.1	0.3
Electronics	1	0.1	0.3
Sub-total Furniture/ Electrical	**18**	**1.7**	**5.1**
Medical & Professional Services			
Doctor	4	0.4	1.1
Real estate agent	4	0.4	1.1
Hospital	2	0.2	0.6
Optometrist	2	0.2	0.6
Accountants	1	0.1	0.3
Solicitor	1	0.1	0.3
Vet	1	0.1	0.3
Sub-total Medical & Professional Services	**15**	**1.4**	**4.3**
Personal Services			
Hairdresser	6	0.6	1.7
Nail salon	2	0.2	0.6
Dry cleaners	1	0.1	0.3
Medicare	1	0.1	0.3
Personal	1	0.1	0.3
Sub-total Personal Services	**11**	**1.0**	**3.1**
Motor Vehicle Services			
Auto One	2	0.2	0.6
Motor vehicle retailer	2	0.2	0.6
Motor vehicle services	2	0.2	0.6
Tyre serice	1	0.1	0.3
Sub-total Motor Vehicle Services	**7**	**0.7**	**2.0**
Education			
School	2	0.2	0.6
TAFE	1	0.1	0.3
Sub-total Education	**3**	**0.3**	**0.9**
Other			
Other	8	0.7	2.3
Car insurance	4	0.4	1.1
Petrol station	4	0.4	1.1
Church	2	0.2	0.6
Mudgee Rural Supplies	2	0.2	0.6
Personal	2	0.2	0.6
RTA	2	0.2	0.6
Community services	1	0.1	0.3
Council	1	0.1	0.3
Info Centre	1	0.1	0.3
Accomodation	1	0.1	0.3
Pay bills	1	0.1	0.3
Pet shop	1	0.1	0.3
Sub-total Other	**30**	**2.8**	**8.6**
Total Valid Responses	**1,070**	**100**	**n = 350**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q6. Number of stores / facilities visited by respondents

No. stores / facilities visited	No. Respondents	
	No.	%
0	2	0.6
1	64	18.3
2	77	22.0
3	88	25.1
4	53	15.1
5	37	10.6
> 5	29	8.3
Total	**350**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd,*Mudgee Town Centre Visitor Survey*, September 2004.

Q7. What new / better shops and / or services would you like to see in the Mudgee CBD?

Shops / Services	No.	%
Discount Department Store		
Big W	71	16.4
Aldi	19	4.4
K-Mart	14	3.2
Take Big W away	1	0.2
Target	1	0.2
Sub-total Discount Department Store	**106**	**24.4**
Clothing		
Variety (catering to various age groups)	8	1.8
Babywear	5	1.2
Ladies wear (for different age groups)	5	1.2
Variety	5	1.2
Evening wear/ rental	4	0.9
Quality clothing stores	4	0.9
Dress shops	3	0.7
Fashion Fair	3	0.7
Baby goods	2	0.5
Maternity wear	2	0.5
Supre	2	0.5
Gloria Jeans	1	0.2
Jay Jays	1	0.2
Ladies wear	1	0.2
Menswear	1	0.2
Noni B	1	0.2
Quality dress shops	1	0.2
Quality ladies wear	1	0.2
Susan	1	0.2
Valley Girl	1	0.2
Sub-total Clothing	**52**	**12.0**
Footwear		
Footwear	20	4.6
Payless	8	1.8
Quality footwear	6	1.4
Affordable footwear	4	0.9
Variety	3	0.7
Childrens footwear	1	0.2
Ladies footwear	1	0.2
Price Attack Shoes	1	0.2
Sub-total Footwear	**44**	**10.1**
Household Stores		
Bunnings	10	2.3
Spotlight	9	2.1
Fabric store	2	0.5
Hardware	2	0.5
Kleins	2	0.5
Priceline	2	0.5
Toy shops	2	0.5
Computer games stores	1	0.2
Cosmetic & toiletry	1	0.2
Discount variety	1	0.2
Fantastic Furniture	1	0.2
Jellewery	1	0.2
Rebel Sport	1	0.2
Sub-total Household Stores	**35**	**8.1**
Recreation, Leisure & Entertainment		
Activities/ entertainment/ facilities (various age groups)	5	1.2
Indoor sports centre	3	0.7
Cheap music store	3	0.7
Music stores	3	0.7
Cinema	1	0.2
Improved cinema	2	0.5
Better musical instruments shop	1	0.2
Bigger library	1	0.2
Camp shop	1	0.2
Entertainment shops	1	0.2
Fitness centre	1	0.2
Indoor rock climbing	1	0.2
Massage parlour	1	0.2
More entertainment	1	0.2
More sports centres	1	0.2
Skating rink	1	0.2
Specialist fishing store	1	0.2
Video games store	1	0.2
Sub-total Recreation, Leisure & Entertainment	**29**	**6.7**
Food, Groceries & Liquor Stores		
Hungry Jacks	4	0.9
Greengrocer	3	0.7
Local produce	3	0.7
Deli	2	0.5
Seafood outlet	2	0.5
Burger King	1	0.2
Child-friendly eateries	1	0.2
French restaurant	1	0.2
Fruit & vegie market	1	0.2
Harris Farm	1	0.2
Italian restaurants	1	0.2
Liquorland	1	0.2
New food chain	1	0.2
Red Rooster	1	0.2
Sarah Lee Warehouse	1	0.2
Sub-total Food, Groceries & Liquor Stores	**24**	**5.5**
Health & Community Services		
More doctors	7	1.6
Better medical facilities/ services	2	0.5
Another medical centre (that bulk bills)	1	0.2
Facilities for mothers and babies	1	0.2
Facilties for the elderly	1	0.2
More dentists	1	0.2
Services for the disabled	1	0.2
Social groups	1	0.2
Transport for the elderly	1	0.2
Wheelchair friendly (shops)	1	0.2
Workshops	1	0.2
Sub-total Health & Community Services	**18**	**4.1**
Department Stores		
David Jones	5	1.2
Department Stores	4	0.9
Grace Bros	3	0.7
Similar to Kelletts	5	1.2
Bring back Kelletts	1	0.2
Sub-total Department Stores	**18**	**4.1**
Retail Services		
Improved customer service	4	0.9
Extended trading hours	2	0.5
Bank	1	0.2
Home delivery service (groceries)	1	0.2
Quality goods store	1	0.2
Sub-total Retail Services	**9**	**2.1**
Supermarket		
Franklins	3	0.7
Coles	2	0.5
Supermarkets	2	0.5
Sub-total Supermarket	**7**	**1.6**
Fashion Accessories		
Handbag shop	4	0.9
Quality accessories	1	0.2
Sub-total Fashion Accessories	**5**	**1.2**
Arts & Craft		
Craft shop	2	0.5
Art shop	1	0.2
Art supplies	1	0.2
Quality craft supplies	1	0.2
Sub-total Arts & Craft	**5**	**1.2**
Parking		
Parking	2	0.5
More parking (at Woolworths)	1	0.2
Sub-total Parking	**3**	**0.7**
Automotive Accessories	**1**	**0.2**
Other		
Satisfied as is	57	13.1
Other	8	1.8
Don't know	4	0.9
Shearing supplies	2	0.5
Accessibility	1	0.2
Local production	1	0.2
More variety	1	0.2
Quality goods	1	0.2
Resonably priced shops	1	0.2
Seating	1	0.2
Security	1	0.2
Sub-total Other	**78**	**18.0**
Total Valid Responses	**434**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd,*Mudgee Town Centre Visitor Survey,* September 2004.

Q8. What other improvements would you like to see in the centre / surrounding area?

Improvements	No.	%
Transport & Parking		
More parking spaces	52	13.4
Better parking	4	1.0
Extended parking limits	3	0.8
Improve taxi rank	3	0.8
Improve train service	3	0.8
Other	3	0.8
Parking	3	0.8
Improve bus service	2	0.5
Improve transport	2	0.5
More all day parking	2	0.5
More parking spaces for workers	2	0.5
Undercover parking	2	0.5
Update Woolworths car park	2	0.5
Bike zone	1	0.3
Bus service	1	0.3
Extension of bike trail	1	0.3
Long-term parking	1	0.3
More disabled parking	1	0.3
Parking for caravans	1	0.3
Unrestricted parking	1	0.3
Wheelchair friendly access	1	0.3
Sub-total Transport & Parking	**91**	**23.4**
Urban Design		
Footpaths (repair)	7	1.8
More trees	7	1.8
Change existing umbrella colour	6	1.5
Brighten streetscape	5	1.3
Better footpath	4	1.0
More gardens/ rest area	3	0.8
More shelter	3	0.8
Better footpaths	2	0.5
More seatings	2	0.5
Underground power cables	2	0.5
Improve signaged	1	0.3
Less concrete	1	0.3
More footpath seating	1	0.3
More footpaths	1	0.3
More greenery	1	0.3
More native vegetation	1	0.3
More sculptures	1	0.3
Pedestrian mall	1	0.3
Prefer pavement to concrete	1	0.3
Seating in shade	1	0.3
Wider footpaths	1	0.3
Withdraw alfresco dining	1	0.3
Sub-total Urban Design	**53**	**13.6**
Road & Traffic Management		
General road maintenance	15	3.9
Better roads	6	1.5
More pedestrian crossings	5	1.3
Traffic congestion	3	0.8
Bettter signage	1	0.3
Install roundabouts	1	0.3
Speed limit	1	0.3
Traffic lights	1	0.3
Wider roads	1	0.3
Sub-total Road & Traffic Management	**34**	**8.7**
Environment & Waste Management		
More garbage bins	8	2.1
More astrays	5	1.3
Awnings maintenance	4	1.0
Cleaner footpaths	4	1.0
General maintenance	4	1.0
More trees	4	1.0
Cleaner centre	2	0.5
Environmental preservation	2	0.5
Sub-total Environment & Waste Management	**33**	**8.5**
Recreation, Leisure & Entertainment		
Activities (catering various age groups)	8	2.1
More entertainment	6	1.5
Entertainment & Facilities (various age groups)	4	1.0
Cinema (& better movies)	2	0.5
Facilities (catering various age groups)	2	0.5
Indoor sports centre	2	0.5
Entertainment centre	1	0.3
Fenced playground with toilets	1	0.3
More alfresco dining	1	0.3
More recreational facilities	1	0.3
More sporting facilities	1	0.3
Places for children	1	0.3
Relocate youth centre	1	0.3
Sub-total Recreation, Leisure & Entertainment	**31**	**8.0**
Amenities		
More public toilet signage	11	2.8
More public toilets	9	2.3
More indoor public toilets	6	1.5
More baby change rooms	3	0.8
Access to public toilets	1	0.3
Sub-total Amenities	**30**	**7.7**
Safety		
Better lighting	22	5.7
More police foot patrol	2	0.5
Cycling on footpath	1	0.3
Sub-total Safety	**25**	**6.4**
Shops & Retail Trade		
Access to shops (relatively spread out)	2	0.5
Brighten shop fronts	2	0.5
More market days	2	0.5
More shops	2	0.5
Repair/ maintenance of shop fronts	2	0.5
Don't have Big W	1	0.3
More discounts	1	0.3
Not very good service	1	0.3
Woolworths flooring (not user friendly)	3	0.8
Sub-total Shops & Retail Trade	**16**	**4.1**
Built Environment		
Repair/ restore old buildings	3	0.8
Uniformity with building facades	1	0.3
Sub-total Built Environment	**4**	**1.0**
Discount Department Store		
Big W	3	0.8
K-Mart	1	0.3
Sub-total Discount Department Store	**4**	**1.0**
Form & Funtion		
Create a mall	2	0.5
Improve access	1	0.3
More character (Mortimer St)	1	0.3
Sub-total Form & Funtion	**4**	**1.0**
Food, Groceries & Liquor Stores		
More restaurants	1	0.3
Cheap liquour outlet	1	0.3
Sub-total Food, Groceries & Liquor Stores	**2**	**0.5**
Health & Community Services		
Another medical centre	1	0.3
Childcare facility	1	0.3
Sub-total Health & Community Services	**2**	**0.5**
Other		
Satisfied as is	46	11.8
Other	6	1.5
Crowded	1	0.3
Extended library hours	1	0.3
Function centres	1	0.3
Mobile phone coverage	1	0.3
More employment opportunities	1	0.3
More TAFE courses	1	0.3
Payless	1	0.3
Variety (catering to various age groups)	1	0.3
Sub-total Other	**60**	**15.4**
Total Valid Responses	**389**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q9. Within the last two years, at what stores / locations have you purchased household appliances, furniture, and furnishings?

Location / Store		No.	%
Mudgee			
	Harvey Norman	80	16.4
	Retravision	73	15.0
	No Store Provided	36	7.4
	Furniture One	26	5.3
	Dick Smith	9	1.8
	Woolworths	9	1.8
	Lounge Plus	7	1.4
	Everyday Living	6	1.2
	Mitre 10	6	1.2
	Target	5	1.0
	Bi-Lo	3	0.6
	Go-Lo	3	0.6
	Best & Less	2	0.4
	Reject Shop	2	0.4
	Sleep City	2	0.4
	Tandy	2	0.4
	Big W	1	0.2
	Clarkesons	1	0.2
	Crazy Prices	1	0.2
	Home & Office	1	0.2
	Honda Centre	1	0.2
	Material World	1	0.2
	Second hand shop	1	0.2
	Software Hut	1	0.2
	Spotlight	1	0.2
	The Inside Shop	1	0.2
Sub-total Mudgee		**281**	**57.6**
No Location Provided			
	Harvey Norman	57	11.7
	Retravision	41	8.4
	Furniture One	9	1.8
	Mitre 10	5	1.0
	Home & Office	3	0.6
	Best & Less	2	0.4
	Dick Smith	2	0.4
	Lounge Plus	2	0.4
	Reject Shop	2	0.4
	Woolworths	2	0.4
	David Jones	1	0.2
	Fletcher Jones	1	0.2
	Garage sale	1	0.2
	Go-Lo	1	0.2
	Good Guys	1	0.2
	Hobby Shop	1	0.2
	Home Hardware	1	0.2
	Recycle shops	1	0.2
	Target	1	0.2
Sub-total No Location Provided		**134**	**27.5**
Dubbo			
	No Store Provided	7	1.4
	K-Mart	6	1.2
	Big W	3	0.6
	Fantastic Furniture	3	0.6
	Good Guys	3	0.6
	Knots Pine	2	0.4
	Baby store	1	0.2
	Freedom	1	0.2
	Harvey Norman	1	0.2
	Lighting House	1	0.2
	Sports Plus	1	0.2
	Toy stores	1	0.2
Sub-total Dubbo		**30**	**6.1**
Bathurst			
	Baby store	1	0.2
	Big W	1	0.2
	Bunnings	1	0.2
	Carpet Court	1	0.2
	Solar West	1	0.2
Sub-total Bathurst		**5**	**1.0**
Gosford			
	Big W	1	0.2
	Dick Smith	1	0.2
	K-Mart	1	0.2
	Knots Pine	1	0.2
	Spotlight	1	0.2
Sub-total Gosford		**5**	**1.0**
Penrith			
	Hardware	1	0.2
	Furniture One	1	0.2
	Spotlight	1	0.2
Sub-total Penrith		**3**	**0.6**
Orange			
	No Store Provided	2	0.4
	Laptop shop	1	0.2
Sub-total Orange		**3**	**0.6**
Tuggerah	**Home Centre**	**1**	**0.2**
Way Way	**K-Mart**	**1**	**0.2**
Wollongong	**No Store Provided**	**1**	**0.2**
Parkes	**Big W**	**1**	**0.2**
Outside Mudgee	**No Store Provided**	**1**	**0.2**
Sydney			
	IKEA	4	0.8
	No Store Provided	4	0.8
	David Jones	2	0.4
	Harvey Norman	2	0.4
	Bing Lee	1	0.2
	Freedom	1	0.2
	Grace Bros	1	0.2
	Myer	1	0.2
	Sports Pro	1	0.2
	Target	1	0.2
	Various stores	1	0.2
Sub-total Sydney		**19**	**3.9**
INTERSTATE			
Brisbane			
	Big W	1	0.2
	Good Guys	1	0.2
Sub-total Brisbane		**2**	**0.4**
Melbourne	**Harvey Norman**	**1**	**0.2**
Total Valid Responses		**488**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey*, September 2004.

Q10. Within the last year, at what stores / locations have you purchased footwear and clothing?

Location / Store		No.	%
Mudgee			
	Target	72	11.3
	Best & Less	55	8.7
	No Store Provided	44	6.9
	Kelletts	27	4.3
	Mathers Shoes	27	4.3
	Blowes Menswear	26	4.1
	Rivers	25	3.9
	Millers	17	2.7
	Woodstock 2000	12	1.9
	Rockmans	10	1.6
	Sportspower	10	1.6
	Langswear	8	1.3
	Honey Pot Boutique	7	1.1
	Just Jeans	6	0.9
	She Boutique	5	0.8
	Salvation Army	3	0.5
	Store 28	3	0.5
	Various stores	3	0.5
	Wear Just 4 Kidz	3	0.5
	Big W	2	0.3
	Vinnies	2	0.3
	Bi-Lo	1	0.2
	Cycles	1	0.2
	Feminine Side	1	0.2
	Go-Lo	1	0.2
	Gorjus	1	0.2
	Marshalls Menswear	1	0.2
	Mudgee Warehouse	1	0.2
	Payless	1	0.2
	Reject Shop	1	0.2
	Saddlery	1	0.2
	Sallies Op-Shop	1	0.2
	Specialist frock shops	1	0.2
	St Vincent's de Paul	1	0.2
	The Warehouse	1	0.2
	Toy World	1	0.2
	Vintage Rose	1	0.2
	Well Heeled	1	0.2
Sub-total Mudgee		**384**	**60.5**
No Location Provided			
	Target	28	4.4
	Mathers Shoes	25	3.9
	Best & Less	19	3.0
	Blowes Menswear	13	2.0
	Rivers	11	1.7
	Millers	10	1.6
	Langswear	7	1.1
	Rockmans	5	0.8
	Just Jeans	4	0.6
	Big W	3	0.5
	Honey Pot Boutique	3	0.5
	Sportspower	3	0.5
	K-Mart	2	0.3
	Salvation Army	2	0.3
	David Jones	1	0.2
	Kelletts	1	0.2
	Landmark	1	0.2
	Material World	1	0.2
	Myer	1	0.2
	Payless	1	0.2
	St Vincent's de Paul	1	0.2
	The Warehouse	1	0.2
	Valley Girl	1	0.2
	Woolworths	1	0.2
Sub-total No Location Provided		**145**	**22.8**
Dubbo			
	Big W	10	1.6
	No Store Provided	9	1.4
	Payless	9	1.4
	Best & Less	1	0.2
	Cruise Clothing	1	0.2
	Fashion Fair	1	0.2
	Fosseys	1	0.2
	Jade	1	0.2
	Jay Jays	1	0.2
	Myer	1	0.2
	Shearing Supplies	1	0.2
	Target	1	0.2
	Valley Girl	1	0.2
Sub-total Dubbo		**38**	**6.0**
Bathurst			
	No Store Provided	3	0.5
	Payless	3	0.5
	Athletes Foot	1	0.2
	Bianca	1	0.2
	Big W	1	0.2
	Footlocker	1	0.2
	Just Jeans	1	0.2
	Orange Williams	1	0.2
Sub-total Bathurst		**12**	**1.9**
Orange			
	Big W	2	0.3
	No Store Provided	2	0.3
	Hangloose Clothing	1	0.2
	Payless	1	0.2
Sub-total Orange		**6**	**0.9**
Campbelltown			
	No Store Provided	1	0.2
	Shoe store	1	0.2
Sub-total Campbelltown		**2**	**0.3**
Penrith	**Payless**	**2**	**0.3**
Rylstone	**No Store Provided**	**1**	**0.2**
Wollongong	**No Store Provided**	**1**	**0.2**
Blacktown	**Big W**	**1**	**0.2**
Broadway	**K-Mart**	**1**	**0.2**
Bowral	**No Store Provided**	**1**	**0.2**
Cowra	**Fix & Fit Footwear**	**1**	**0.2**
Erina	**Ziggies**	**1**	**0.2**
Gosford	**Supre**	**1**	**0.2**
Parramatta			
	Fernando's	1	0.2
	Payless	1	0.2
Sub-total Parramatta		**2**	**0.3**
Sydney			
	No Store Provided	16	2.5
	David Jones	3	0.5
	Grace Bros	3	0.5
	Target	2	0.3
	Big W	1	0.2
	Country Road	1	0.2
	Footlocker	1	0.2
	Jay Jays	1	0.2
	Lowes	1	0.2
	Millers	1	0.2
	Myer	1	0.2
	Ralph Lauren	1	0.2
	Supre	1	0.2
	Various stores	1	0.2
Sub-total Sydney		**34**	**5.4**
All around town	**No Store Provided**	**1**	**0.2**
INTERSTATE			
Brisbane	**No Store Provided**	**1**	**0.2**
Total Valid Responses		**635**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q11. To what age group do you belong?

Age Group	No.	%
Under 18	8	2.3
19-29	64	18.2
30-39	52	14.8
40-59	106	30.2
60+	121	34.5
Total Valid Responses ^	**351**	**100.0**

^ Exceeds sample survey of n = 350 as some surveys included 2 people (e.g. couples)

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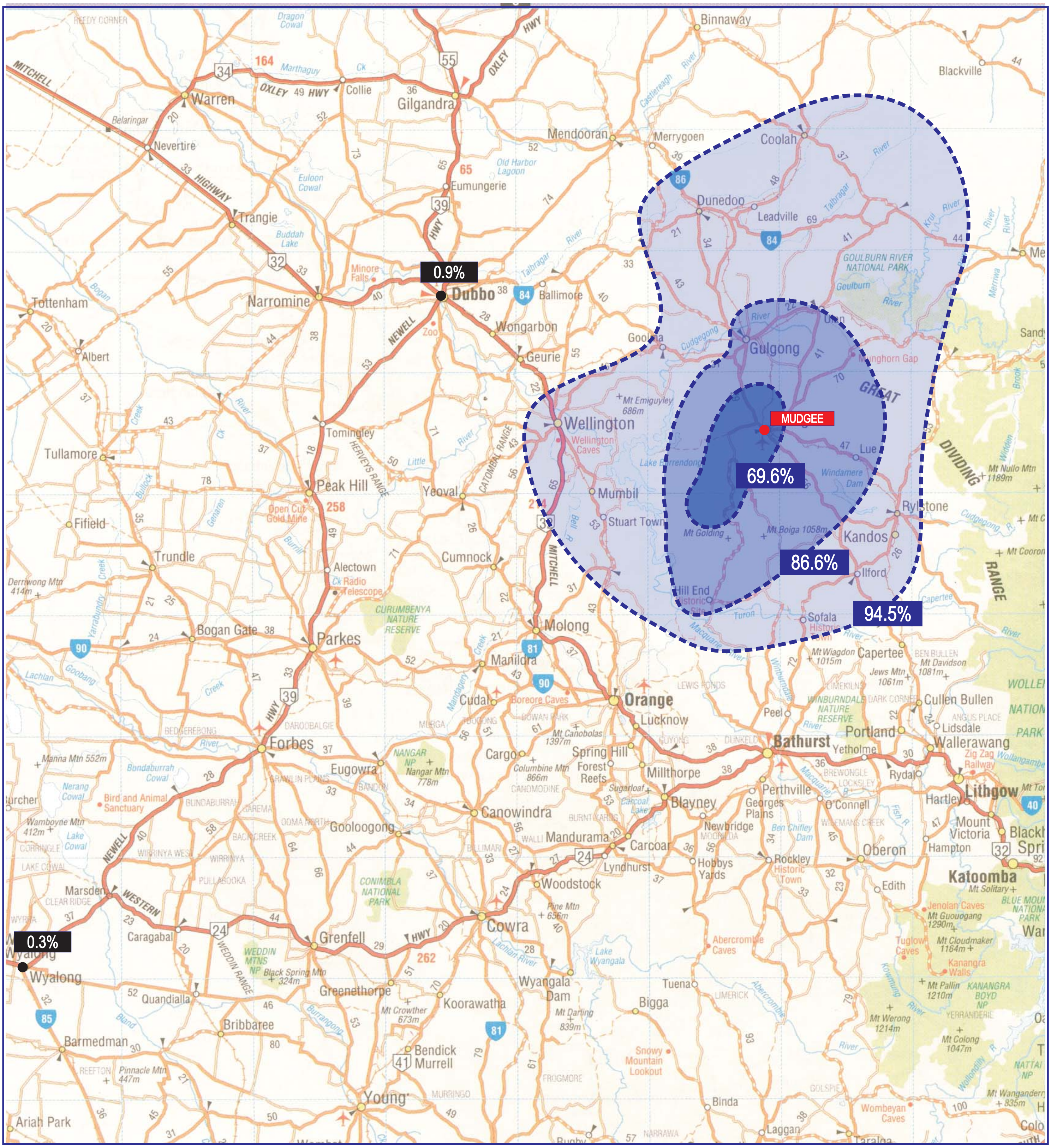
MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Mudgee Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Mudgee Town Centre Visitor Survey,* September 2004.

Q12. What cities or towns have you visited in the past 12 months?

Cities / Towns Visited	No. Visitors in Past 12 Months	Sporting	Social	Shopping	Medical	Professional Services	Other	Total Valid Responses (City / Town)	Total Valid Responses
	No.	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No.	No.
Other Cities / Towns	299	12	108	40	14	6	22	**202**	
Dubbo	264	31	65	127	63	18	18	**322**	
Other Sydney	241	19	87	57	37	17	13	**230**	
Bathurst	211	37	64	73	40	10	11	**235**	**1,385**
Western Sydney (Parramatta / Penrith)	191	11	72	59	36	11	10	**199**	
Orange	188	23	45	57	52	8	12	**197**	
	% Respondents (n = 350)	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**%**	
Other Cities / Towns	85.4	11.7	22.8	28.9	26.4	4.1	6.1	**100.0**	
Dubbo	75.4	9.6	20.2	39.4	19.6	5.6	5.6	**100.0**	
Other Sydney	68.9	5.5	36.2	29.6	18.1	5.5	5.0	**100.0**	
Bathurst	60.3	5.9	53.5	19.8	6.9	3.0	10.9	**100.0**	
Western Sydney (Parramatta / Penrith)	54.6	15.7	27.2	31.1	17.0	4.3	4.7	**100.0**	
Orange	53.7	8.3	37.8	24.8	16.1	7.4	5.7	**100.0**	



Base Source: The Penguin Touring Atlas of Australia Edition 1994

*** Contours show cumulative percentages of the spatial distribution of Mudgee Town Centre visitors**

0 20 40km

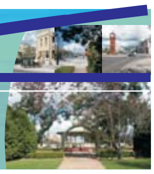
MID-WESTERN REGIONAL COUNCIL
RETAIL REVIEW

RATIO CONSULTANTS
February 2005

RESIDENTIAL DISTRIBUTION OF VISITORS TO THE MUDGEE TOWN CENTRE

Source: Ratio Consultants Pty Ltd, Mudgee Town Centre Visitor Survey, September 2004

Project 6205



MID-WESTERN REGIONAL SHIRE RETAIL REVIEW

APPENDIX C

Rylstone Town Centre Visitor Survey
September 2004

Interviewer No.: __________ Survey No.: __________

RYLSTONE TOWN CENTRE VISITOR SURVEY
Mid Western Regional Shire Council

September __________ 2004

Good morning/afternoon, we are undertaking a survey for Council. May I ask you a few questions? (please tick the appropriate box).

Time interview am/pm __________ Location number (refer map reference) __________

Sex: Male ☐ Female ☐

1. Could you please indicate where you live?

☐ Rylstone ☐ Bombira / Putta Bucca

☐ Mudgee Township ☐ Dunedoo

☐ Gulgong ☐ Coolah

☐ Kandos Other (please indicate) :

____________________ Postcode ____________

2. How did you travel to the Rylstone Town Centre today? (please tick)

☐ Car as Driver ☐ Bus ☐ Taxi ☐ Other

☐ Car as Passenger ☐ Bicycle ☐ Walk

3. What is your intended length of stay in the Rylstone Town Centre?

Less than 1 hour ☐ 1-2 Hours ☐ 2-3 Hours ☐ 3-4 Hours ☐

More than 4 hours ☐

4. Approximately how frequently do you visit the Rylstone Town Centre for any purpose?

☐ Daily / Several times a week ☐ Approximately weekly ☐ Fortnightly

☐ Monthly ☐ Hardly ever / First time

5. What activities are you undertaking in the Rylstone Town Centre today? (you may tick more than

one response)

☐ Shopping ☐ Personal Services (hairdresser, banking, dry cleaning etc) ☐ Medical and professional services

☐ Work ☐ Education

☐ Recreation, leisure, entertainment (eg cinema, restaurant, bowling etc)

☐ Other please specifiy ____________________

____

6. What stores or other facilities will you be visiting today in the Rylstone Town Centre? (You may tick more than one box).

☐ Supermarket ☐ Newsagent ☐ Other (please specify)

☐ Greengrocer ☐ Chemist ____________________

☐ Post office ☐ Hardware ____________________

☐ Bank ☐ Library

7. What new / better shops and / or services would you like to see in the Rylstone Town Centre?

____

____

8. Where do you purchase most of your groceries?

☐ Rylstone ☐ Mudgee ☐ Other location (please indicate)

☐ Equally split between Rylstone and Mudgee ____________________

9. What other improvements would you like to see in the centre / surrounding area?

____

____

____

10. Within the last two years, at what stores / locations have you purchased household appliances, furniture, and furnishings?

____

____

11. Within the last year, at what stores / locations have you purchased footwear and clothing?

12. To what age group do you belong?

- [ ] Under 18 years
- [ ] 19 - 29 years
- [ ] 30 - 39 years
- [ ] 40 - 59 years
- [ ] 60+ years

13. What Towns have you Visited in the Past 12 Months. Tick relevant boxes.

City of Town	Have Not Visited	Have Visited Primary Purpose					
		Sporting	Social	Shopping	Medical	Professional Services	Other
Mudgee							
Kandos							
Bathurst							
Dubbo							
Orange							
Western Sydney (Parramatta / Penrith)							
Other Sydney							
Other Cities / Towns Please Indicate							

Thank you for your co-operation

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Gender

Gender	No.	%
Females	31	59.6
Males	21	40.4
Total Valid Responses	**52**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q1. Could you please indicate where you live?

Place of Residence		Postcode	No.	%
Mid-Western Region				
	Rylstone	2849	26	47.3
	Kandos	2848	9	16.4
	Lue	2850	4	7.3
	Bylong	2849	2	3.6
	Mudgee Township	2850	2	3.6
	Murringo	2586	1	1.8
	Cowra	2794	1	1.8
	Orange	2800	1	1.8
	Coolah	2843	1	1.8
	Gulgong	2852	1	1.8
	Parkes	2870	1	1.8
Sub-total Mid-Western Region			**49**	**89.0**
Murray Region	**Albury**	**2640**	**1**	**1.8**
Metropolitan Sydney				
	Mt Victoria	2786	1	1.8
	Newport	2106	1	1.8
Sub-total Metropolitan Sydney			**2**	**3.6**
Interstate			**2**	**3.6**
Overseas			**1**	**1.8**
Total Valid Responses			**55**	**100**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q2. How did you travel to the Rylstone Town Centre today?

Mode of Travel	No.	%
Car as Driver	28	50.9
Walk	13	23.6
Car as Passenger	10	18.2
Bicycle	3	5.5
Other	1	1.8
Total Valid Responses	**55**	**100.0**

Q3. What is your intended length of stay in the Rylstone Town Centre?

Length of Stay	No.	%
Less than 1 hour	16	29.1
1-2 hours	17	30.9
2-3 hours	7	12.7
3-4 hours	2	3.6
More than 4 hours	13	23.6
Total Valid Responses	**55**	**100.0**

Q4. Approximately how frequently do you visit the Rylstone Town Centre for any purpose?

Purpose of Visit	No.	%
Daily/ Several Times a Week	30	54.5
Approx Weekly	11	20.0
Fortnightly	1	1.8
Monthly	3	5.5
Hardly Ever/ First Time	10	18.2
Total Valid Responses	**55**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q5. What activities are you undertaking in the Rylstone Town Centre today? (More than one response permitted)

Activity	No.	%
Work	**15**	**21.1**
Personal Services	**14**	**19.7**
Recreation, leisure & entertainment	**13**	**18.3**
Shopping	**12**	**16.9**
Medical & Professional Services	**3**	**4.2**
Other		
Sheepdog trials	4	5.6
Tourist	4	5.6
Social	3	4.2
Meeting	1	1.4
Post Office	1	1.4
Vet	1	1.4
Sub-total Other	**14**	**19.7**
Total Valid Responses	**71**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q6. What stores or other facilities will you be visiting today in the Rylstone Town Centre? (More than o

Store / Facility	Responses		Respondents (n = 55)
	No.	%	%
Food, Groceries & Liquor Stores			
Supermarket	12	11.0	21.8
Café	7	6.4	12.7
Bakery	3	2.8	5.5
Greengrocer	3	2.8	5.5
Produce store	3	2.8	5.5
Butcher	2	1.8	3.6
Restaurant	2	1.8	3.6
Takeaway	2	1.8	3.6
Deli	1	0.9	1.8
Sub-total Food, Groceries & Liquor Stores	**35**	**32.1**	**63.6**
Retail Commercial Services			
Bank	14	12.8	25.5
Post Office	16	14.7	29.1
Real Estate	4	3.7	7.3
Sub-total Retail Commercial Services	**34**	**31.2**	**61.8**
Household Stores			
Newsagent	20	18.3	36.4
Hardware	8	7.3	14.5
Gift Shop	1	0.9	1.8
Sub-total Household Stores	**29**	**26.6**	**52.7**
Recreation, Leisure & Entertainment			
Pub	6	5.5	10.9
Bowling Club	1	0.9	1.8
Sub-total Recreation, Leisure & Entertainment	**7**	**6.4**	**12.7**
Personal Services			
Hairdresser	3	2.8	5.5
Doctor	1	0.9	1.8
Sub-total Personal Services	**4**	**3.7**	**7.3**
Total Valid Responses	**109**	**100.0**	**N/A**

ne response permitted)

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q6. Number of stores / facilities visited by respondents

No. stores / facilities visitied	No. Respondents	
	No.	**%**
0	3	5.5
1	21	38.2
2	14	25.5
3	10	18.2
4	6	10.9
> 4	1	1.8
Total	**55**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q7. What new / better shops and / or services would you like to see in the Rylstone Town Centre?

Shops / Services	No.	%
Food, Groceries & Liquor Stores		
Higher quality fresh produce	5	6.4
Health foods	3	3.8
Bakery - extended trading hours on Saturday	2	2.6
Better takeaway food	2	2.6
Food - lower prices	2	2.6
Greengrocer - poor quality produce	2	2.6
Groceries - lower prices	2	2.6
Hygiene at food establishments	2	2.6
Bakery	1	1.3
Better sandwich shop	1	1.3
More cafés	1	1.3
Sub-total Food, Groceries & Liquor Stores	**23**	**29.5**
Recreation, Leisure & Entertainment		
Library	7	9.0
Better camping/caravan park	2	2.6
More info for tourists	2	2.6
Childrens play area	1	1.3
Quiet for tourists	1	1.3
That caters for young people	1	1.3
Sub-total Recreation, Leisure & Entertainment	**14**	**17.9**
Retail Commercial Services		
ATM at Bank	10	12.8
Relocate ATM	4	5.1
Sub-total Retail Commercial Services	**14**	**17.9**
Shops & Retail Trade		
Trading hours of shops (earlier/extended)	5	6.4
Video store	3	3.8
Service station - earlier trading hours	2	2.6
Book shop (new & used)	1	1.3
Hardware store - extended trading hours on weekend	1	1.3
Sub-total Shops & Retail Trade	**12**	**15.4**
Health & Community Services		
Chemist	4	5.1
Vet in attendance more often	4	5.1
Another doctor	1	1.3
Sub-total Health & Community Services	**9**	**11.5**
Other		
Photocopying service	2	2.6
Resources at Post Office	2	2.6
Petrol - lower prices	1	1.3
Satisfied	1	1.3
Sub-total Other	**6**	**7.7**
Total Valid Responses	**78**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q8. Where do you purchase most of your groceries?

Location	No.	%
Mudgee	**19**	**31.1**
Equally Split Between Rylstone & Mudgee	**13**	**21.3**
Rylstone	**2**	**3.3**
Other		
Kandos	9	14.8
Lithgow	6	9.8
Parkes	2	3.3
Albury	1	1.6
Coolah	1	1.6
Cowra	1	1.6
Gulgong	1	1.6
Katoomba	1	1.6
Mona Vale	1	1.6
Orange	1	1.6
Young	1	1.6
Sub-total Other	**25**	**41.0**
Interstate	**2**	**3.3**
Total Valid Responses	**61**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q9. What other improvements would you like to see in the centre / surrounding area?

Improvements	No.	%
Food, Groceries & Liquor Stores		
Supermarket competition	6	12.2
Better deli	3	6.1
Bakery - extended trading hours on weekends	1	2.0
Better range of products in supermarkets	1	2.0
Groceries - lower prices	1	2.0
Higher quality fresh produce	1	2.0
Sub-total Food, Groceries & Liquor Stores	**13**	**26.5**
Road & Traffic Management		
50km speed limit in selected areas	4	8.2
Roads (improve/maintainence)	4	8.2
80km speed limit in selected areas	3	6.1
Sub-total Road & Traffic Management	**11**	**22.4**
Recreation, Leisure & Entertainment		
Improve caravan park	2	4.1
Improve library in Kandos	1	2.0
Library - open daily	1	2.0
Limited options for tourists	1	2.0
Tourist info (closed)	1	2.0
Sub-total Recreation, Leisure & Entertainment	**6**	**12.2**
Health & Community Services		
Better medical centre in Kandos	1	2.0
Less waiting for doctors appointment	1	2.0
More doctors	1	2.0
Vet in attendance more often	1	2.0
Sub-total Health & Community Services	**4**	**8.2**
Transport & Parking		
Public transport between Rylstone & Kandos	1	2.0
Some form of public transport	1	2.0
Undercover parking	1	2.0
Sub-total Transport & Parking	**3**	**6.1**
Other		
ATM at Bank	5	10.2
Revamp Kandos (incl. Buildings)	4	8.2
Better footpaths	1	2.0
Policing of noisy cars	1	2.0
Satisfied	1	2.0
Sub-total Other	**12**	**24.5**
Total Valid Responses	**49**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q10. Within the last two years, at what stores / locations have you purchased household appliance,

Location / Store		No.	%
Mudgee			
	Harvey Norman	10	15.6
	Retravision	6	9.4
	Dick Smith	5	7.8
	Everyday Living	2	3.1
	Furniture One	2	3.1
	Lounges Plus	2	3.1
	Material World	1	1.6
Sub-total Mudgee		**28**	**43.8**
Lithgow			
	Dick Smith	4	6.3
	Merv Moore	4	6.3
	Go-Lo	1	1.6
	The Warehouse	1	1.6
Sub-total Lithgow		**10**	**15.6**
Bathurst	**Harvey Norman**	**8**	**12.5**
Katoomba			
	Furniture One	1	1.6
	K-Mart	1	1.6
	Macarthurs	1	1.6
Sub-total Katoomba		**3**	**4.7**
Orange			
	Big W	1	1.6
	Furniture One	1	1.6
	No store provided	1	1.6
Sub-total Orange		**3**	**4.7**
Penrith	**Grace Bros**	**2**	**3.1**
Albury/Wodonga	**No store provided**	**1**	**1.6**
Blackheath	**Antique shop**	**1**	**1.6**
Brookevale	**Grace Bros**	**1**	**1.6**
Cowra	**Brian Witt**	**1**	**1.6**
Dubbo	**Freedom Furniture**	**1**	**1.6**
Gulgong	**Bargain Barn**	**1**	**1.6**
Young	**Furniture One**	**1**	**1.6**
Interstate		**2**	**3.1**
Overseas		**1**	**1.6**
Total Valid Responses		**64**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q11. Within the last year, at what stores / locations have you purchased footwear and clothing?

Location / Store		No.	%
Mudgee			
	Target	15	11.2
	Millers	11	8.2
	Blowes Menswear	8	6.0
	Best & Less	4	3.0
	Langswear	4	3.0
	Rockmans	4	3.0
	Mathers	2	1.5
	Jenny K	1	0.7
	Just Jeans	1	0.7
	Pharmacy	1	0.7
	Williams	1	0.7
Sub-total Mudgee		**52**	**38.8**
Lithgow			
	Target	7	5.2
	Just Jeans	5	3.7
	Millers	5	3.7
	Crossroads	3	2.2
	Payless Shoes	3	2.2
	Braceys	1	0.7
	Mathers	1	0.7
	Rockmans	1	0.7
	The Warehouse	1	0.7
Sub-total Lithgow		**27**	**20.1**
Bathurst			
	Big W	3	2.2
	Grace Bros	3	2.2
	Parkers Clothing	1	0.7
	Payless Shoes	1	0.7
	Workwear	1	0.7
	No store provided	1	0.7
Sub-total Bathurst		**10**	**7.5**
Penrith			
	Grace Bros	3	2.2
	Big W	2	1.5
	Target	2	1.5
	Williams	1	0.7
Sub-total Penrith		**8**	**6.0**
Orange			
	Big W	2	1.5
	Myer	2	1.5
	Grace Bros	1	0.7
	Noni-B	1	0.7
Sub-total Orange		**6**	**4.5**
Kandos	**Hawkins**	**5**	**3.7**
Rylstone	**Rylstone**	**5**	**3.7**
Dubbo			
	Big W	2	1.5
	No store provided	1	0.7
Sub-total Dubbo		**3**	**2.2**
Young			
	Target	2	1.5
	Mathers	1	0.7
Sub-total Young		**3**	**2.2**
Katoomba	**K-Mart**	**2**	**1.5**
Newcastle			
	Blowes Menswear	1	0.7
	No store provided	1	0.7
Sub-total Newcastle		**2**	**1.5**
Albury/Wodonga	**No store provided**	**1**	**0.7**
Brookevale	**Grace Bros**	**1**	**0.7**
Canberra	**David Jones**	**1**	**0.7**
Cowra	**Target**	**1**	**0.7**
Parramatta	**David Jones**	**1**	**0.7**
Warriewood	**K-Mart**	**1**	**0.7**
No location provided	**St Vincent de Paul**	**1**	**0.7**
Interstate		**3**	**2.2**
Overseas		**1**	**0.7**
Total Valid Responses		**134**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q12. To what age group do you belong?

Age Group	No.	%
Under 18	3	5.5
19-29	7	12.7
30-39	12	21.8
40-59	28	50.9
60+	5	9.1
Total Valid Responses	**55**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Rylstone Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Rylstone Town Centre Visitor Survey,* September 2004.

Q13. What cities or towns have you visited in the past 12 months?

Cities / Towns Visited	No. Visitors in Past 12 Months	Sporting	Social	Shopping	Medical	Professional Services	Other	Total Valid Responses (City / Town)	Total Valid Responses
	No.	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No.	No.
Bathurst	55	14	48	33	8	0	6	**109**	**754**
Other Cities / Towns	55	18	74	23	6	8	22	**151**	
Mudgee	53	15	48	43	21	16	12	**155**	
Kandos	44	7	32	24	15	9	24	**111**	
Orange	44	10	33	14	6	1	4	**68**	
Dubbo	35	8	28	12	4	1	4	**57**	
Western Sydney (Parramatta / Penrith)	34	8	21	17	2	2	1	**51**	
Other Sydney	30	8	24	7	6	5	2	**52**	
	% Respondents (n = 55)	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**%**	
Bathurst	100.0	12.8	44.0	30.3	7.3	0.0	5.5	**100.0**	
Other Cities / Towns	100.0	11.9	49.0	15.2	4.0	5.3	14.6	**100.0**	
Mudgee	96.4	9.7	31.0	27.7	13.5	10.3	7.7	**100.0**	
Kandos	80.0	6.3	28.8	21.6	13.5	8.1	21.6	**100.0**	
Orange	80.0	14.7	48.5	20.6	8.8	1.5	5.9	**100.0**	
Dubbo	63.6	14.0	49.1	21.1	7.0	1.8	7.0	**100.0**	
Western Sydney (Parramatta / Penrith)	61.8	15.7	41.2	33.3	3.9	3.9	2.0	**100.0**	
Other Sydney	54.5	15.4	46.2	13.5	11.5	9.6	3.8	**100.0**	

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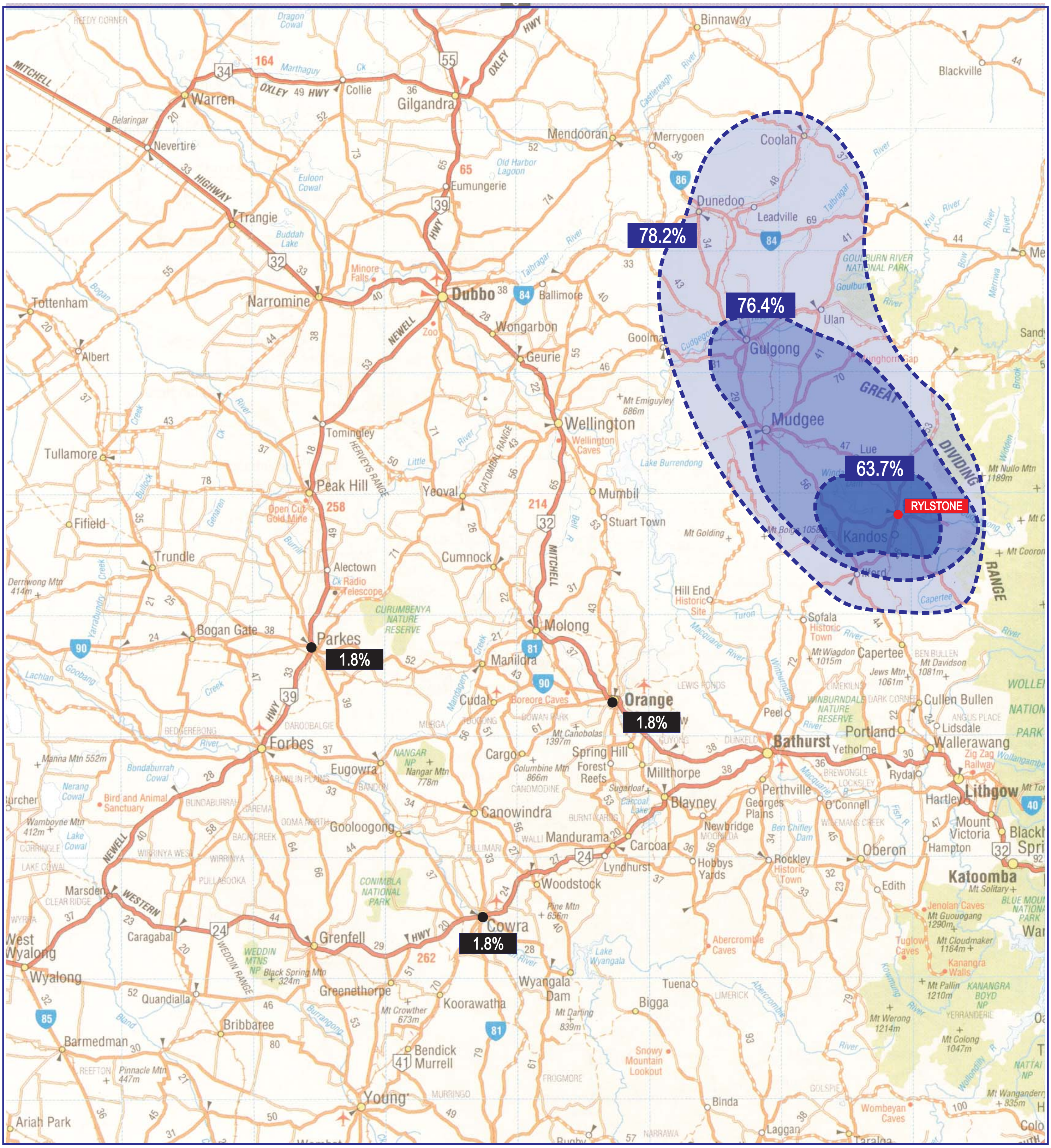

Base Source: The Penguin Touring Atlas of Australia Edition 1994

*** Contours show cumulative percentages of the spatial distribution of Rylstone Town Centre visitors**

0 20 40km

MID-WESTERN REGIONAL COUNCIL
RETAIL REVIEW

RATIO CONSULTANTS
February 2005

RESIDENTIAL DISTRIBUTION OF VISITORS TO THE RYLSTONE TOWN CENTRE

Source: Ratio Consultants Pty Ltd, Rylstone Town Centre Visitor Survey, September 2004

Project 6205

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW

APPENDIX D

Gulgong Town Centre Visitor Survey
September 2004

Interviewer No.: __________ Survey No.: __________

GULGONG TOWN CENTRE VISITOR SURVEY
Mid Western Regional Shire Council

September __________ 2004

Good morning/afternoon, we are undertaking a survey for Council. May I ask you a few questions? (please tick the appropriate box).

Time interview am/pm __________ Location number (refer map reference) __________

Sex: Male ☐ Female ☐

1. Could you please indicate where you live?

☐ Gulgong ☐ Bombira / Putta Bucca

☐ Mudgee Township ☐ Dunedoo

☐ Rylestone ☐ Coolah

☐ Kandos Other (please indicate) :

____________________ Postcode ____________

2. How did you travel to the Gulgong Town Centre today? (please tick)

☐ Car as Driver ☐ Bus ☐ Taxi ☐ Other

☐ Car as Passenger ☐ Bicycle ☐ Walk

3. What is your intended length of stay in the Gulgong Town Centre?

Less than 1 hour ☐ 1-2 Hours ☐ 2-3 Hours ☐ 3-4 Hours ☐

More than 4 hours ☐

4. Approximately how frequently do you visit the Gulgong Town Centre for any purpose?

☐ Daily / Several times a week ☐ Approximately weekly ☐ Fortnightly

☐ Monthly ☐ Hardly ever / First time

5. What activities are you undertaking in the Gulgong Town Centre today? (you may tick more than

one response)

☐ Shopping
☐ Personal Services (hairdresser, banking, dry cleaning etc)
☐ Medical and professional services
☐ Work
☐ Education
☐ Recreation, leisure, entertainment (eg cinema, restaurant, bowling etc)
☐ Other please specifiy ________________________________

____

6. What stores or other facilities will you be visiting today in the Gulgong Town Centre? (You may tick more than one box).

☐ Supermarket
☐ Newsagent
☐ Other (please specify)
☐ Greengrocer
☐ Chemist
☐ Post office
☐ Hardware
☐ Bank
☐ Library

____
____

7. What new / better shops and / or services would you like to see in the Gulgong Town Centre?

____
____

8. Where do you purchase most of your groceries?

☐ Gulgong
☐ Mudgee
☐ Other location (please indicate)
☐ Equally split between Gulgong and Mudgee

____

9. What other improvements would you like to see in the centre / surrounding area?

____
____
____

10. Within the last two years, at what stores / locations have you purchased household appliances, furniture, and furnishings?

____
____

11. Within the last year, at what stores / locations have you purchased footwear and clothing?

12. To what age group do you belong?

- [ ] Under 18 years
- [ ] 19 - 29 years
- [ ] 30 - 39 years
- [ ] 40 - 59 years
- [ ] 60+ years

13. What Towns have you Visited in the Past 12 Months. Tick relevant boxes.

City of Town	Have Not Visited	Have Visited Primary Purpose					
		Sporting	Social	Shopping	Medical	Professional Services	Other
Mudgee							
Bathurst							
Dubbo							
Orange							
Western Sydney (Parramatta / Penrith)							
Other Sydney							
Other Cities / Towns Please Indicate							

Thank you for your co-operation

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Gender

Gender	No.	%
Females	67	59.8
Males	45	40.2
Total Valid Responses ^	**112**	**100.0**

^ Exceeds sample survey of n = 107 as some surveys included 2 people (e.g. couples) xls]Gende

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q1. Could you please indicate where you live?

Place of Residence	Postcode	No.	%
Mid-Western Region			
Gulgong	2852	69	66.3
Mudgee Township	2850	6	5.8
Dunedoo	2844	4	3.8
Ulan	2850	4	3.8
Bombira/ Putta Bucca	2850	3	2.9
Dubbo	2830	2	1.9
Yarrawonga	2852	2	1.9
Cooks Gap	2850	1	1.0
Coolah	2843	1	1.0
Gilgandra	2827	1	1.0
Goolma	2852	1	1.0
Tallawang	2852	1	1.0
Turill	2850	1	1.0
Sub-total Mid-Western Region		**96**	**92.4**
Mid-North Coast Region			
Taree	2430	1	1.0
Wauchope	2446	1	1.0
Sub-total Mid-North Coast Region		**2**	**2.0**
Metropolitan Sydney			
Sydney	2000	1	1.0
Queanbeyan	2060	1	1.0
Picnic Point	2213	1	1.0
Oatley	2223	1	1.0
Sub-total Metropolitan Sydney		**4**	**4.0**
Canberra	2600	**1**	**1.0**
Interstate		**1**	**1.0**
Total Valid Responses		**104**	**100**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q2. How did you travel to the Gulgong Town Centre today?

Mode of Travel	No.	%
Car as Driver	72	64.9
Car as Passenger	22	19.8
Bus	1	0.9
Bicycle	1	0.9
Walk	15	13.5
Total Valid Responses ^	**111**	**100.0**

^ Exceeds sample survey of n = 107 as some surveys included 2 people (e.g. couples)

Q3. What is your intended length of stay in the Gulgong Town Centre?

Length of Stay	No.	%
Less than 1 hour	44	41.9
1-2 hours	30	28.6
2-3 hours	11	10.5
3-4 hours	5	4.8
More than 4 hours	15	14.3
Total Valid Responses	**105**	**100.0**

Q4. Approximately how frequently do you visit the Gulgong Town Centre for any purpose?

Purpose of Visit	No.	%
Daily/ Several Times a Week	69	64.5
Approx Weekly	15	14.0
Fortnightly	7	6.5
Monthly	7	6.5
Hardly Ever/ First Time	9	8.4
Total Valid Responses	**107**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q5. What activities are you undertaking in the Gulgong Town Centre today? (More than one response permitted)

Activity	No.	%
Shopping	**81**	**45.8**
Personal Services	**30**	**16.9**
Recreation, leisure & entertainment	**21**	**11.9**
Work	**13**	**7.3**
Medical & Professional Services	**11**	**6.2**
Other		
Social	9	5.1
Browsing	3	1.7
Tourist	2	1.1
Bakery	1	0.6
Breakfast	1	0.6
Education	1	0.6
Lunch	1	0.6
Other	1	0.6
Passing through	1	0.6
Post Office	1	0.6
Sub-total Other	**21**	**11.9**
Total Valid Responses	**177**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q6. What stores or other facilities will you be visiting today in the Gulgong Town Centre? (More than one response permitted

Store / Facility	Responses		Respondents (n = 107)
	No.	%	%
Food, Groceries & Liquor Stores			
Supermarket	80	25.6	74.8
Bakery	6	1.9	5.6
Greengrocer	6	1.9	5.6
Butcher	3	1.0	2.8
Café	3	1.0	2.8
Cake shop	1	0.3	0.9
Takeaway	1	0.3	0.9
Sub-total Food, Groceries & Liquor Stores	**100**	**31.9**	**93.5**
Household Stores			
Newsagent	55	17.6	51.4
Chemist	33	10.5	30.8
Hardware	10	3.2	9.3
Sub-total Household Stores	**98**	**31.3**	**91.6**
Retail Commercial Services			
Post Office	51	16.3	47.7
Bank	44	14.1	41.1
Sub-total Retail Commercial Services	**95**	**30.4**	**88.8**
Recreation, Leisure & Entertainment			
Library	6	1.9	5.6
Pub	2	0.6	1.9
Video store	2	0.6	1.9
Museum	1	0.3	0.9
Opera House	1	0.3	0.9
RSL	1	0.3	0.9
Sub-total Recreation, Leisure & Entertainment	**13**	**4.2**	**12.1**
Other			
Doctor	3	1.0	2.8
Other	2	0.6	1.9
Petrol Station	1	0.3	0.9
Hairdresser	1	0.3	0.9
Sub-total Other	**7**	**2.2**	**6.5**
Total Valid Responses	**313**	**100.0**	**N/A**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q6. Number of stores / facilities visited by respondents

No. stores / facilities visited	Respondents	
	No.	%
0	5	4.7
1	15	14.0
2	28	26.2
3	25	23.4
4	17	15.9
5	5	4.7
> 5	12	11.2
Total	**107**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q7. What new / better shops and / or services would you like to see in the Gulgong Town Centre?

Shops / Services	No.	%
Clothing		
Clothing stores	26	21.5
Ladies wear	3	2.5
Variety	3	2.5
Affordable clothing stores	2	1.7
Adults clothing	1	0.8
Baby wear	1	0.8
Blowes Menswear	1	0.8
Childrens clothing	1	0.8
Footwear	1	0.8
Good dress shop	1	0.8
Millers	1	0.8
Quality clothes	1	0.8
Sub-total Clothing	**42**	**34.7**
Food, Groceries & Liquor Stores		
Café	3	2.5
Good restaurants	3	2.5
Greengrocer	2	1.7
Pizza shop	2	1.7
Alfresco dining	1	0.8
Better eating establishments	1	0.8
Ice creamery	1	0.8
Less bakeries	1	0.8
Less cafés	1	0.8
Pubs	1	0.8
Subway	1	0.8
Takeaway (variety)	1	0.8
Sub-total Food, Groceries & Liquor Stores	**18**	**14.9**
Health & Community Services		
Doctors	5	4.1
More doctors	3	2.5
Medicare Office	2	1.7
Less delay in seeing doctors	1	0.8
Nursing homes	1	0.8
Sub-total Health & Community Services	**12**	**9.9**
Footwear		
Footwear	7	5.8
Variety	2	1.7
Ladies footwear	1	0.8
Mens footwear	1	0.8
Sub-total Footwear	**11**	**9.1**
Supermarket		
Supermarket competition	7	5.8
Bi-Lo (delivery service)	1	0.8
Franklins	1	0.8
Sub-total Supermarket	**9**	**7.4**
Transport & Parking		
Bus service	2	1.7
Better parking	1	0.8
More parking spaces	1	0.8
Parking	1	0.8
Parking (safety/security)	1	0.8
Taxi service	1	0.8
Sub-total Transport & Parking	**7**	**5.8**
Household Stores		
Electrical shop	1	0.8
Manchester shop	1	0.8
Retravision	1	0.8
Sewing goods store	1	0.8
Sub-total Household Stores	**4**	**3.3**
Recreation, Leisure & Entertainment		
Acitivities/ entertainment/ facilities (Various age groups)	1	0.8
Cinema	1	0.8
Clubs	1	0.8
Go-Kart Centre	1	0.8
Sub-total Recreation, Leisure & Entertainment	**4**	**3.3**
Retail Commercial Services		
Better banking access	1	0.8
More banks	1	0.8
Sub-total Retail Commercial Services	**2**	**1.7**
Road & Traffic Management	**2**	**1.7**
Other		
Satisfied	2	1.7
Accommodation	1	0.8
Accommodation/ services for the disabled	1	0.8
Customers	1	0.8
Minimise shop vacancies	1	0.8
More corner shops	1	0.8
Other	1	0.8
Road Traffic Authority (RTA)	1	0.8
Vet	1	0.8
Sub-total Other	**10**	**8.3**
Total Valid Responses	**121**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q8. Where do you purchase most of your groceries?

Location	No.	%
Gulgong	**57**	**52.8**
Equally Split Between Gulgong & Mudgee	**21**	**19.4**
Mudgee	**14**	**13.0**
Other		
Other	6	5.6
Coolah	2	1.9
Dunedoo	2	1.9
Canberra	1	0.9
Dubbo	1	0.9
Lithgow	1	0.9
Revesby	1	0.9
Riverwood	1	0.9
Sydney	1	0.9
Sub-total Other	**16**	**14.8**
Total Valid Responses	**108**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q9. What other improvements would you like to see in the centre / surrounding area?

Improvements	No.	%
Road & Traffic Management		
Roads (improve/maintenance)	22	23.4
Improve Main Street	2	2.1
Wider roads	2	2.1
Reduce speed limit on Main St	1	1.1
Restrict trucks on Main St	1	1.1
Speeding controls	1	1.1
Traffic signage	1	1.1
Wider roads in Main St	1	1.1
Sub-total Road & Traffic Management	**31**	**33.0**
Transport & Parking		
Better parking	5	5.3
More parking spaces	4	4.3
Bus service	1	1.1
Carpark maintenance	1	1.1
More carparks	1	1.1
Taxi service	1	1.1
Sub-total Transport & Parking	**13**	**13.8**
Health & Community Services		
More doctors	5	5.3
Doctors	2	2.1
Disability services	1	1.1
Youth services	1	1.1
Sub-total Health & Community Services	**9**	**9.6**
Recreation, Leisure & Entertainment		
Activities/ facilities (for youth)	6	6.4
Better childrens park	1	1.1
Sporting facilities	1	1.1
Sub-total Recreation, Leisure & Entertainment	**8**	**8.5**
Urban Design		
Better footpaths	1	1.1
Drop gutters	1	1.1
Improve parks	1	1.1
More parks	1	1.1
Retain heritage value	1	1.1
Underground power cables	1	1.1
Sub-total Urban Design	**6**	**6.4**
Shops & Retail Trade		
Alfresco dining on narrow footpaths	1	1.1
More tourist-friendly	1	1.1
Over supply of coffee shops	1	1.1
Vacant shops	1	1.1
Sub-total Shops & Retail Trade	**4**	**4.3**
Safety		
Improve lighting	2	2.1
More local police availability	1	1.1
Sub-total Safety	**3**	**3.2**
Clothing	**3**	**3.2**
Environment & Waste Management		
Dog droppings	1	1.1
Clean footpaths	1	1.1
Sub-total Environment & Waste Management	**2**	**2.1**
Form & Function		
Revitalise centre	1	1.1
Tourism potential	1	1.1
Sub-total Form & Function	**2**	**2.1**
Food, Groceries & Liquor Stores	**1**	**1.1**
Other		
Satisfied	4	4.3
Maintenance of cemetery	1	1.1
More public toilets	1	1.1
Non-supportive Council	1	1.1
Poor mobile phone reception	1	1.1
Promote Gulgong as equally as Mudgee	1	1.1
Supermarket	1	1.1
Too crowded	1	1.1
Vacant shops	1	1.1
Sub-total Other	**12**	**12.8**
Total Valid Responses	**94**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q10. Within the last two years, at what stores / locations have you purchased household appliance, furniture, and furnishings?

Location / Store		No.	%
Mudgee			
	No store provided	39	39.8
	Harvey Norman	9	9.2
	Retravision	6	6.1
	Tandy	2	2.0
	Mitre 10	1	1.0
Sub-total Mudgee		**57**	**58.2**
Dubbo			
	No store provided	16	16.3
	Harvey Norman	2	2.0
	Good Guys	1	1.0
	Pine Furniture	1	1.0
Sub-total Dubbo		**20**	**20.4**
Gulgong			
	No store provided	8	8.2
	Mitre 10	1	1.0
Sub-total Gulgong		**9**	**9.2**
No location provided			
	Harvey Norman	4	4.1
	Everyday Living	2	2.0
	Daryl Adams	1	1.0
	Retravision	1	1.0
Sub-total No location provided		**8**	**8.2**
Sydney	**No store provided**	**2**	**2.0**
Queabeyan	**No store provided**	**1**	**1.0**
Wauchope	**No store provided**	**1**	**1.0**
Total Valid Responses		**98**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q11. Within the last year, at what stores / locations have you purchased footwear and clothing?

Location / Store		No.	%
Mudgee			
	No store provided	52	38.2
	Target	7	5.1
	Best & Less	4	2.9
	Mathers	4	2.9
	Rivers	4	2.9
	Woolworths	2	1.5
	Blowes Menswear	1	0.7
	Millers	1	0.7
Sub-total Mudgee		**75**	**55.1**
Dubbo			
	No store provided	22	16.2
	Big W	2	1.5
Sub-total Dubbo		**24**	**17.6**
Gulgong			
	No store provided	9	6.6
	Esbers	1	0.7
Sub-total Gulgong		**10**	**7.4**
Sydney			
	No store provided	5	3.7
	Target	1	0.7
Sub-total Sydney		**6**	**4.4**
No location provided			
	Mathers	2	1.5
	Rivers	1	0.7
	Target	1	0.7
	Woolworths	1	0.7
Sub-total No location provided		**5**	**3.7**
Bathurst	**No store provided**	**2**	**1.5**
Bankstown	**No store provided**	**1**	**0.7**
Canberra	**No store provided**	**1**	**0.7**
Hurstville	**No store provided**	**1**	**0.7**
Newcastle	**No store provided**	**1**	**0.7**
Orange	**No store provided**	**1**	**0.7**
Parramatta	**No store provided**	**2**	**1.5**
Roselands	**No store provided**	**2**	**1.5**
Wauchope	**No store provided**	**1**	**0.7**
Everywhere	**No store provided**	**1**	**0.7**
Interstate	**No store provided**	**2**	**1.5**
Internet	**No store provided**	**1**	**0.7**
Total Valid Responses		**136**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q12. To what age group do you belong?

Age Group	No.	%
Under 18	2	1.9
19-29	14	13.6
30-39	24	23.3
40-59	33	32.0
60+	30	29.1
Total Valid Responses	**103**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Gulgong Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Gulgong Town Centre Visitor Survey,* September 2004.

Q13. What cities or towns have you visited in the past 12 months?

Cities / Towns Visited	No. Visitors in Past 12 Months	Sporting	Social	Shopping	Medical	Professional Services	Other	Total Valid Responses (City / Town)	Total Valid Responses
	No.	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No.	No.
Mudgee	104	7	47	81	31	20	10	**196**	**513**
Other Cities / Towns	101	2	8	5	2	1	16	**34**	
Dubbo	86	6	10	54	23	1	10	**104**	
Other Sydney	50	0	11	6	5	2	20	**44**	
Orange	48	1	2	14	13	1	9	**40**	
West'n Sydney (Parramatta/ Penrith)	48	0	18	16	2	3	7	**46**	
Bathurst	45	3	16	18	5	2	5	**49**	
	% Respondents (n = 107)	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**%**	
Mudgee	97.2	3.6	24.0	41.3	15.8	10.2	5.1	**100.0**	
Other Cities / Towns	94.4	5.9	23.5	14.7	5.9	2.9	47.1	**100.0**	
Dubbo	80.4	5.8	9.6	51.9	22.1	1.0	9.6	**100.0**	
Other Sydney	46.7	0.0	25.0	13.6	11.4	4.5	45.5	**100.0**	
Orange	44.9	2.5	5.0	35.0	32.5	2.5	22.5	**100.0**	
West'n Sydney (Parramatta/ Penrith)	44.9	0.0	39.1	34.8	4.3	6.5	15.2	**100.0**	
Bathurst	42.1	6.1	32.7	36.7	10.2	4.1	10.2	**100.0**	

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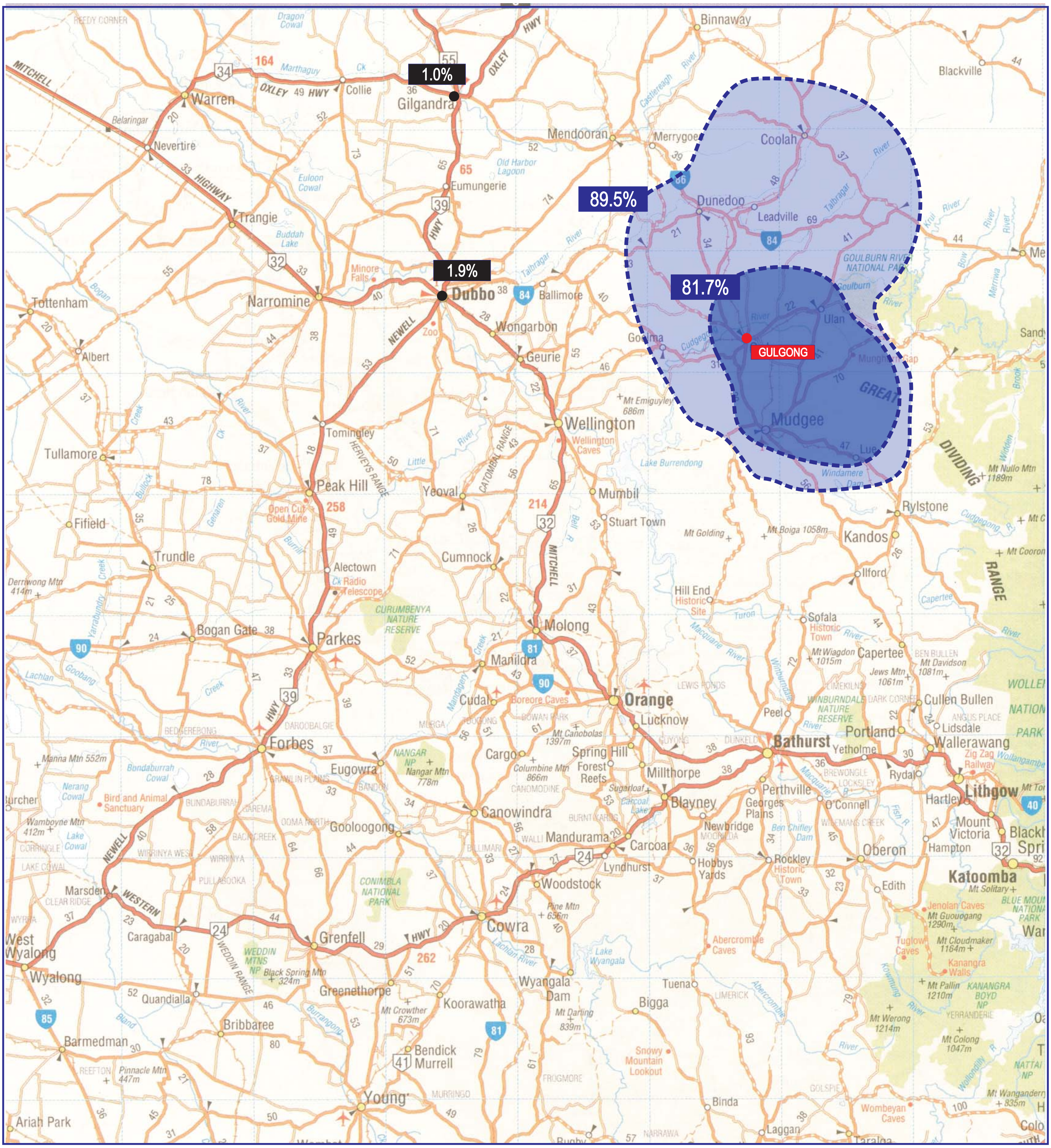

Base Source: The Penguin Touring Atlas of Australia Edition 1994

*** Contours show cumulative percentages of the spatial distribution of Gulgong Town Centre visitors**

0 20 40km

RESIDENTIAL DISTRIBUTION OF VISITORS TO THE GULGONG TOWN CENTRE

Source: Ratio Consultants Pty Ltd, Gulgong Town Centre Visitor Survey, September 2004

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW

APPENDIX E

Kandos Town Centre Visitor Survey
September 2004

Interviewer No.: __________ Survey No.: __________

KANDOS TOWN CENTRE VISITOR SURVEY
Mid Western Regional Shire Council

September __________ 2004

Good morning/afternoon, we are undertaking a survey for Council. May I ask you a few questions? (please tick the appropriate box).

Time interview am/pm __________ Location number (refer map reference) __________

Sex: Male ☐ Female ☐

1. Could you please indicate where you live?

☐ Kandos ☐ Bombira / Putta Bucca

☐ Mudgee Township ☐ Dunedoo

☐ Gulgong ☐ Coolah

☐ Rylestone Other (please indicate) :

____________________ Postcode ____________

2. How did you travel to the Kandos Town Centre today? (please tick)

☐ Car as Driver ☐ Bus ☐ Taxi ☐ Other

☐ Car as Passenger ☐ Bicycle ☐ Walk

3. What is your intended length of stay in the Kandos Town Centre?

Less than 1 hour ☐ 1-2 Hours ☐ 2-3 Hours ☐ 3-4 Hours ☐

More than 4 hours ☐

4. Approximately how frequently do you visit the Kandos Town Centre for any purpose?

☐ Daily / Several times a week ☐ Approximately weekly ☐ Fortnightly

☐ Monthly ☐ Hardly ever / First time

5. What activities are you undertaking in the Kandos Town Centre today? (you may tick more than

one response)

- [ ] Shopping
- [ ] Personal Services (hairdresser, banking, dry cleaning etc)
- [ ] Medical and professional services
- [ ] Work
- Education
- [ ] Recreation, leisure, entertainment (eg cinema, restaurant, bowling etc)
- [ ] Other please specifiy ______________________________

____

6. What stores or other facilities will you be visiting today in the Kandos Town Centre? (You may tick more than one box).

- [ ] Supermarket
- [ ] Newsagent
- [ ] Other (please specify) ______________________________ ______________________________
- [ ] Greengrocer
- [ ] Chemist
- [ ] Post office
- [ ] Hardware
- [ ] Bank
- [ ] Library

7. What new / better shops and / or services would you like to see in the Kandos Town Centre?

____

____

8. Where do you purchase most of your groceries?

- [ ] Kandos
- [ ] Mudgee
- [ ] Other location (please indicate) ______________________________
- [ ] Equally split between Kandos and Mudgee

9. What other improvements would you like to see in the centre / surrounding area?

____

____

____

10. Within the last two years, at what stores / locations have you purchased household appliances, furniture, and furnishings?

____

____

11. Within the last year, at what stores / locations have you purchased footwear and clothing?

12. To what age group do you belong?

- [ ] Under 18 years
- [ ] 19 - 29 years
- [ ] 30 - 39 years
- [ ] 40 - 59 years
- [ ] 60+ years

13. What Towns have you Visited in the Past 12 Months. Tick relevant boxes.

City of Town	Have Not Visited	Have Visited Primary Purpose					
		Sporting	Social	Shopping	Medical	Professional Services	Other
Mudgee							
Rylestone							
Bathurst							
Dubbo							
Orange							
Western Sydney (Parramatta / Penrith)							
Other Sydney							
Other Cities / Towns Please Indicate							

Thank you for your co-operation

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Gender

Gender	No.	%
Females	20	33.3
Males	40	66.7
Total Valid Responses	**60**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q1. Could you please indicate where you live?

Place of Residence		Postcode	No.	%
Mid-Western Region				
	Kandos	2848	21	35.0
	Rylstone	2849	18	30.0
	Mudgee Township	2850	2	3.3
	Ilford	2850	1	1.7
	Lue	2850	1	1.7
Sub-total Mid-Western Region			**43**	**71.7**
Central West Region				
	Charbon	2848	7	11.7
	Clandulla	2848	2	3.3
	Glen Davis	2846	2	3.3
	Lithgow	2790	2	3.3
	Bylong	2849	1	1.7
	Glen Alice	2849	1	1.7
Sub-total Central West Region			**15**	**25.0**
Metropolitan Sydney	**Springwood**	**2777**	**2**	**3.3**
Total Valid Responses			**60**	**100.0**

Kandos Town Centre Visitor Survey

Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q2. How did you travel to the Kandos Town Centre today?

Mode of Travel	No.	%
Car as Driver	34	56.7
Car as Passenger	11	18.3
Walk	9	15.0
Bicycle	4	6.7
Other	2	3.3
Total Valid Responses	**60**	**100.0**

Q3. What is your intended length of stay in the Kandos Town Centre?

Length of Stay	No.	%
Less than 1 hour	19	31.7
1-2 hours	26	43.3
2-3 hours	8	13.3
3-4 hours	1	1.7
More than 4 hours	6	10.0
Total Valid Responses	**60**	**100.0**

Q4. Approximately how frequently do you visit the Kandos Town Centre for any purpose?

Purpose of Visit	No.	%
Daily/ Several Times a Week	36	60.0
Approx Weekly	16	26.7
Fortnightly	3	5.0
Monthly	3	5.0
Hardly Ever/ First Time	2	3.3
Total Valid Responses	**60**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q5. What activities are you undertaking in the Kandos Town Centre today? (More than one response permitted)

Activity	No.	%
Shopping	**35**	**33.0**
Recreation, leisure & entertainment		
Recreation, leisure & entertainment	11	10.4
Library	10	9.4
Exercise	1	0.9
Lunch	1	0.9
Restaurant	1	0.9
Video shop	1	0.9
Sub-total Recreation, leisure & entertainment	**25**	**23.6**
Personal Services	**18**	**17.0**
Work	**12**	**11.3**
Medical & Professional Services	**11**	**10.4**
Other		
Car serviced	1	0.9
Social	1	0.9
Open day at school	1	0.9
Education	1	0.9
Social	1	0.9
Sub-total Other	**5**	**4.7**
Total Valid Responses	**106**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q6. What stores or other facilities will you be visiting today in the Kandos Town Centre? (More than one response permitted)

Store / Facility		Responses		Respondents (n = 60)
		No.	%	%
Household Stores				
	Newsagent	31	16.2	51.7
	Chemist	21	11.0	35.0
	Hardware	9	4.7	15.0
Sub-total Household Stores		**61**	**31.9**	**101.7**
Food, Groceries & Liquor Stores				
	Supermarket	35	18.3	58.3
	Restaurant	8	4.2	13.3
	Butcher	7	3.7	11.7
	Greengrocer	4	2.1	6.7
	Coffee shop	1	0.5	1.7
	Hamburger shop	1	0.5	1.7
	Liquor store	1	0.5	1.7
	Takeaway food	1	0.5	1.7
Sub-total Food, Groceries & Liquor Stores		**58**	**30.4**	**96.7**
Retail Commercial Services				
	Post Office	26	13.6	43.3
	Bank	21	11.0	35.0
Sub-total Retail Commercial Services		**47**	**24.6**	**78.3**
Recreation, Leisure & Entertainment				
	Library	13	6.8	21.7
	RSL Club	2	1.0	3.3
	Restaurant	1	0.5	1.7
	Video shop	1	0.5	1.7
Sub-total Recreation, Leisure & Entertainment		**17**	**8.9**	**28.3**
Health & Community Services	**Doctor**	**3**	**1.6**	**5.0**
Personal Services	**Hairdresser**	**3**	**1.6**	**5.0**
Other				
	Car mechanic	1	0.5	1.7
	Revamp centre	1	0.5	1.7
Sub-total Other		**2**	**1.0**	**3.3**
Total Valid Responses		**191**	**100.0**	**N/A**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q6. Number of stores / facilities visited by respondents

No. stores / facilities visited	Respondents	
	No.	%
1	14	23.3
2	11	18.3
3	8	13.3
4	15	25.0
5	5	8.3
> 5	7	11.7
Total	**60**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q7. What new / better shops and / or services would you like to see in the Kandos Town Centre?

Shops / Services	No.	%
Food, Groceries & Liquor Stores		
Groceries - lower prices	6	10.0
Bakery	5	8.3
Better greengrocer	3	5.0
Groceries - wider range	3	5.0
Deli	3	5.0
Supermarket located near other shops	2	3.3
Cheaper supermarket	1	1.7
Health food shop	1	1.7
Liquor - lower prices	1	1.7
Liquor - more variety	1	1.7
Supermarket competition	1	1.7
Sub-total Food, Groceries & Liquor Stores	**27**	**45.0**
Health & Community Services		
Another doctor	1	1.7
Better chemist	1	1.7
Medical centre	1	1.7
Pharmacy - lower prices	1	1.7
Vet - increase business hours	1	1.7
Sub-total Health & Community Services	**5**	**8.3**
Household Stores		
Gift shop	2	3.3
Florist	1	1.7
Hardware - wider range of goods	1	1.7
White goods	1	1.7
Sub-total Household Stores	**5**	**8.3**
Recreation, Leisure & Entertainment		
More childrens play area	1	1.7
Bicycle shop	1	1.7
Library - open daily	1	1.7
Sub-total Recreation, Leisure & Entertainment	**3**	**5.0**
Retail Commercial Services		
ATM at bank	2	3.3
More ATMs	1	1.7
Sub-total Retail Commercial Services	**3**	**5.0**
Other		
Extended trading hours	5	8.3
Revamp Kandos (incl. Buildings)	4	6.7
Improve footpaths	2	3.3
Lower prices	2	3.3
Satisfied	2	3.3
Public transport	1	1.7
Shoe & bag shop	1	1.7
Sub-total Other	**17**	**28.3**
Total Valid Responses	**60**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q8. Where do you purchase most of your groceries?

Location	No.	%
Kandos	24	35.8
Mudgee	17	25.4
Equally Split Between Kandos & Mudgee	11	16.4
Lithgow	8	11.9
Bathurst	3	4.5
Penrith	2	3.0
Rylstone	2	3.0
Total Valid Responses	**67**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q9. What other improvements would you like to see in the centre / surrounding area?

Improvements	No.	%
Built Environment & Urban Design		
Revamp Kandos (incl. Buildings)	11	18.3
Improve footpaths	2	3.3
Fix pavements	1	1.7
Improve landscape	1	1.7
Sub-total Built Environment & Urban Design	**15**	**25.0**
Recreation, Leisure & Entertainment		
Library - increase opening hours	2	3.3
More for young people	2	3.3
Video shop	2	3.3
Better parks/ play areas for children	1	1.7
Library	1	1.7
Library area needs maintenance	1	1.7
Skateboarding area	1	1.7
Sub-total Recreation, Leisure & Entertainment	**10**	**16.7**
Food, Groceries & Liquor Stores		
Aldi	3	5.0
Better deli	1	1.7
Butcher - lower prices	1	1.7
Groceries - lower prices	1	1.7
Groceries - wider range	1	1.7
Supermarket too far from other shops	1	1.7
Sub-total Food, Groceries & Liquor Stores	**8**	**13.3**
Road & Traffic Management		
More sealed roads	5	8.3
80km speed limit on selected roads	2	3.3
Seal all roads	1	1.7
Sub-total Road & Traffic Management	**8**	**13.3**
Health & Community Services		
Chemist	2	3.3
Vet - increase business hours	2	3.3
Another doctor	1	1.7
Medical centre	1	1.7
Sub-total Health & Community Services	**6**	**10.0**
Retail Commercial Services		
ATM at C'wealth Bank	2	3.3
Improve post office	2	3.3
Sub-total Retail Commercial Services	**4**	**6.7**
Education		
Multi-purpose sports building at school	1	1.7
Repaint line markings at school	1	1.7
Sub-total Education	**2**	**3.3**
Other		
Another hairdresser	1	1.7
K-Mart in Mudgee	1	1.7
More shops	1	1.7
Petrol - lower prices	1	1.7
Public transport	1	1.7
Satisfied	1	1.7
Street maintenance	1	1.7
Sub-total Other	**7**	**11.7**
Total Valid Responses	**60**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q10. Within the last two years, at what stores / locations have you purchased household appliance, furniture, and furnishings

Location / Store		No.	%
Mudgee			
	Harvey Norman	16	26.7
	Retravision	5	8.3
	Dick Smith	4	6.7
	Everyday Living	4	6.7
	No store provided	2	3.3
	Tandy	2	3.3
	Furniture One	1	1.7
	Home Décor	1	1.7
Sub-total Mudgee		**35**	**58.3**
Bathurst			
	Harvey Norman	6	10.0
	Grace Bros	1	1.7
	Mountain Pine	1	1.7
	Spotlight	1	1.7
Sub-total Bathurst		**9**	**15.0**
Lithgow			
	Merv Moore	3	5.0
	Aldi	1	1.7
	Furniture	1	1.7
	The Warehouse	1	1.7
Sub-total Lithgow		**6**	**10.0**
Penrith			
	Domayne	2	3.3
	Harvey Norman	2	3.3
	Grace Bros	1	1.7
Sub-total Penrith		**5**	**8.3**
Kandos			
	Hardware shop	1	1.7
	Trins Bargains	1	1.7
Sub-total Kandos		**2**	**3.3**
Orange	**No store provided**	**1**	**1.7**
No location provided			
	Retravision	1	1.7
	Harvey Norman	1	1.7
Sub-total No location provided		**2**	**3.3**
Total Valid Responses		**60**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q11. Within the last year, at what stores / locations have you purchased footwear and clothing?

Location / Store		No.	%
Mudgee			
	Target	13	9.8
	Best & Less	9	6.8
	Millers	6	4.5
	Blowes Menswear	3	2.3
	Mathers	3	2.3
	No store provided	3	2.3
	Rivers	3	2.3
	Langswear	2	1.5
Sub-total Mudgee		**42**	**31.8**
Kandos			
	Hawkins	13	9.8
	St Vincent de Paul	2	1.5
	Trins Bargains	1	0.8
Sub-total Kandos		**16**	**12.1**
Lithgow			
	Millers	4	3.0
	Payless Shoes	4	3.0
	Target	4	3.0
	Braceys	2	1.5
	Mathers	1	0.8
	Williams Shoes	1	0.8
Sub-total Lithgow		**16**	**12.1**
Bathurst			
	Big W	6	4.5
	Rivers	4	3.0
	Grace Bros	2	1.5
	Blowes Menswear	1	0.8
	Millers	1	0.8
Sub-total Bathurst		**14**	**10.6**
Orange			
	Big W	5	3.8
	K-Mart	5	3.8
	Grace Bros	1	0.8
	Millers	1	0.8
	Various boutiques	1	0.8
	Various shops	1	0.8
Sub-total Orange		**14**	**10.6**
Penrith			
	Big W	4	3.0
	Target	4	3.0
	Myer	2	1.5
	Grace Bros	1	0.8
Sub-total Penrith		**11**	**8.3**
Rylstone	**Hawkins**	**8**	**6.1**
No location provided			
	St Vincent de Paul	3	2.3
	Best & Less	1	0.8
	Big W	1	0.8
	Party Plan	1	0.8
	Target	1	0.8
Sub-total No location provided		**7**	**5.3**
Katoomba	**K-Mart**	**2**	**1.5**
Dubbo	**Various shops**	**1**	**0.8**
Tuggerah	**Westfield**	**1**	**0.8**
Total Valid Responses		**132**	**100.0**

MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q12. To what age group do you belong?

Age Group	No.	%
Under 18	4	6.7
19-29	10	16.7
30-39	8	13.3
40-59	28	46.7
60+	10	16.7
Total Valid Responses	**60**	**100.0**

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MID-WESTERN REGIONAL SHIRE RETAIL REVIEW
Kandos Town Centre Visitor Survey
Source: Ratio Consultants Pty Ltd, *Kandos Town Centre Visitor Survey,* September 2004.

Q13. What cities or towns have you visited in the past 12 months?

Cities / Towns Visited	No. Visitors in Past 12 Months	Sporting	Social	Shopping	Medical	Professional Services	Other	Total Valid Responses (City / Town)	Total Valid Responses
	No.	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No. Responses	No.	No.
Mudgee	59	13	44	51	23	11	11	**153**	**663**
Rylstone	59	9	49	23	10	10	16	**117**	
Other Cities / Towns	56	9	55	19	4	5	14	**106**	
Bathurst	55	7	35	39	12	1	4	**98**	
Orange	42	8	27	18	8	0	1	**62**	
Western Sydney (Parramatta / Penrith)	41	7	17	13	6	1	6	**50**	
Other Sydney	36	2	12	3	3	2	8	**30**	
Dubbo	32	9	23	10	1	1	3	**47**	
	% Respondents (n = 60)	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**% Responses**	**%**	
Mudgee	1.0	8.5	28.8	33.3	15.0	7.2	7.2	**100.0**	
Rylstone	1.0	7.7	41.9	19.7	8.5	8.5	13.7	**100.0**	
Other Cities / Towns	0.9	8.5	51.9	17.9	3.8	4.7	13.2	**100.0**	
Bathurst	0.9	7.1	35.7	39.8	12.2	1.0	4.1	**100.0**	
Orange	0.7	12.9	43.5	29.0	12.9	0.0	1.6	**100.0**	
Western Sydney (Parramatta / Penrith)	0.7	14.0	34.0	26.0	12.0	2.0	12.0	**100.0**	
Other Sydney	0.6	6.7	40.0	10.0	10.0	6.7	26.7	**100.0**	
Dubbo	0.5	19.1	48.9	21.3	2.1	2.1	6.4	**100.0**	

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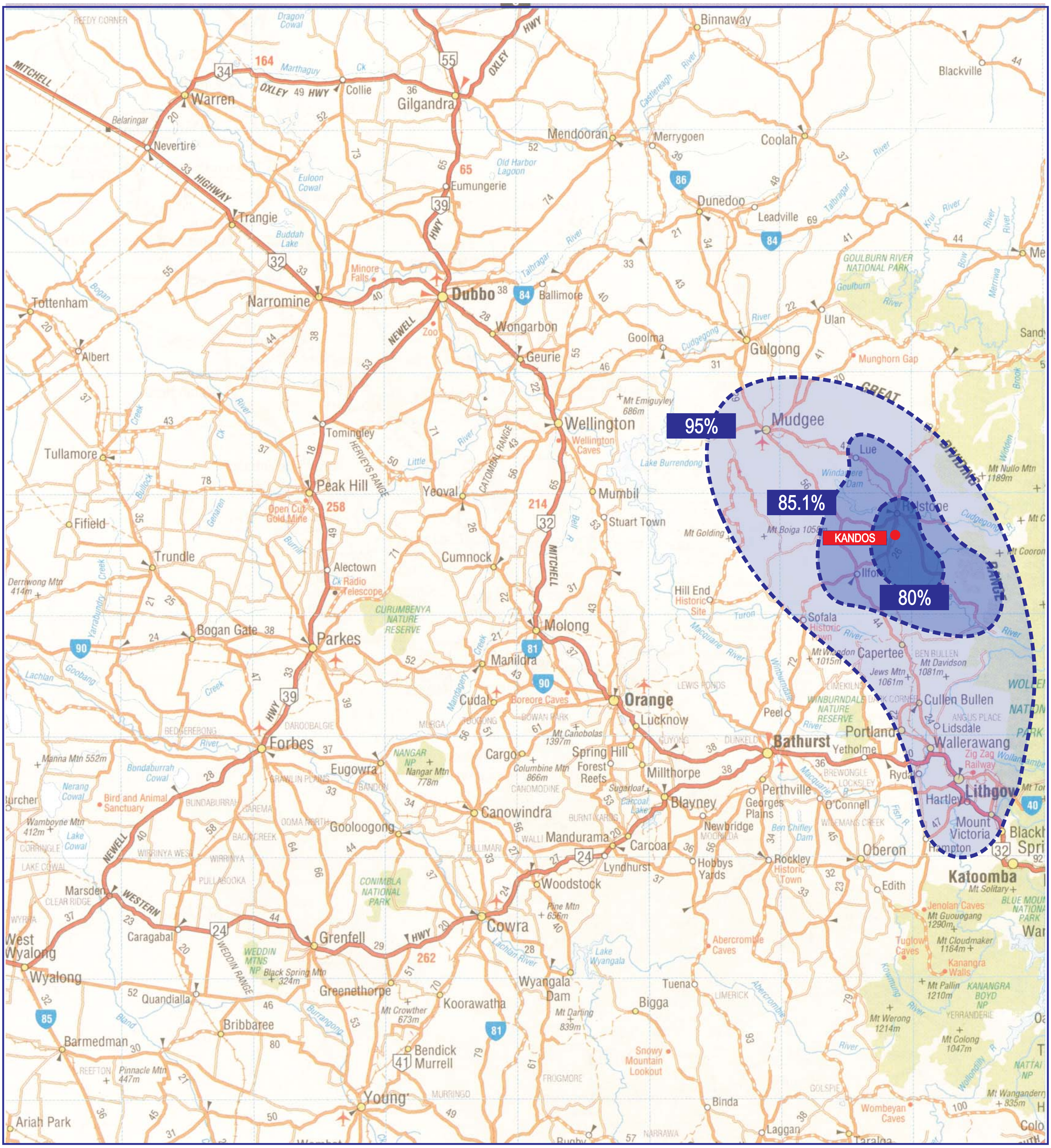

Base Source: The Penguin Touring Atlas of Australia Edition 1994

*** Contours show cumulative percentages of the spatial distribution of Kandos Town Centre visitors**

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MID-WESTERN REGIONAL COUNCIL
RETAIL REVIEW

RATIO CONSULTANTS
February 2005

RESIDENTIAL DISTRIBUTION OF VISITORS TO THE KANDOS TOWN CENTRE

Source: Ratio Consultants Pty Ltd, Kandos Town Centre Visitor Survey, September 2004

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