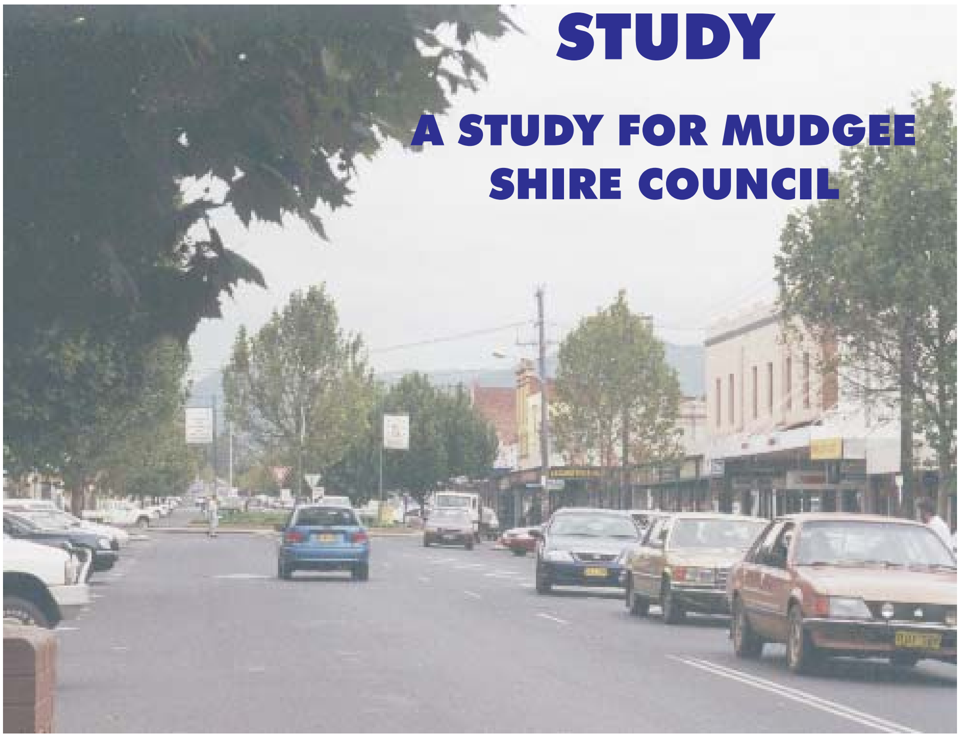
APRIL 2000

MUDGEE RETAIL STUDY

A STUDY FOR MUDGEE SHIRE COUNCIL



Ratio Consultants Pty Ltd

Mudgee Retail Study

A Study for Mudgee Shire Council

Prepared by:
Ratio Consultants Pty Ltd

April 2000
Ref: 4464#1/JW:em

Table of Contents

EXECUTIVE SUMMARY i

1. INTRODUCTION 1

1.1 STUDY CONTEXT 1

2. STUDY PROCESS 4

2.1 PRINCIPLES IN THE DETERMINATION OF RETAIL FLOORSPACE REQUIREMENTS ... 4

3. HOUSEHOLD AND POPULATION FORECASTS 7

3.1 RESIDENTIAL DEVELOPMENT PATTERNS 7
3.2 FORECASTS OF HOUSEHOLDS AND POPULATION (1996-2021) 8

4. CURRENT RETAIL FLOORSPACE IN THE SHIRE 10

5. ASSESSED ROLE, PERFORMANCE AND NEEDS OF THE MUDGEE CBD ... 11

5.1 REGIONAL CATCHMENT AREA 11
5.2 PATRONAGE PATRONS AND ROLE OF THE MUDGEE CBD 12
5.3 PATTERNS OF ESCAPE EXPENDITURE 13
5.4 RETAIL AND AMENITY NEEDS OF THE CBD 14

6. ASSESSMENT OF RETAIL FLOORSPACE REQUIREMENTS (1999-2021) 15

6.1 RATES OF PROVISION OF RETAIL FLOORSPACE 15
6.2 FUTURE RETAIL FLOORSPACE REQUIREMENTS FOR THE SHIRE (1999-2021) 18
6.3 RECOMMENDED ALLOCATION OF RETAIL FLOORSPACE REQUIREMENTS FOR MUDGEE SHIRE (1999-2011) 19

7. STRATEGIC PRINCIPLES AND GUIDELINES FOR THE MUDGEE CBD 21

7.1 LAND USE ANALYSIS OF THE MUDGEE CBD 22
7.2 FUNCTIONAL ANALYSIS OF THE CBD 22
7.3 MUDGEE LOCAL ENVIRONMENTAL PLAN (1998) 23
7.4 STRATEGIC PRINCIPLES FOR RETAIL AND COMMERCIAL DEVELOPMENT 24

8. CAR PARKING ASSESSMENT 26

9. EVALUATION OF MORTIMER STREET CAR PARK SITE FOR FUTURE RETAIL DEVELOPMENT 28

10. CONCLUSIONS 31

List of Tables

Table A : Shire of Mudgee – Retail Floorspace Requirements (1999-2021)
Table Set B : Shire of Mudgge – Residential Development, Household and Population Statistics and Forecasts (1971-2021)

Table C : Rates of Provision of Retail Floorspace Requirements
Table D : Shire of Mudgee – Existing Retail Floorspace (December 1999)
Table Set E : Mudgee Town Centre Shopper Survey (December 1999)
Table Set F : Escape Expenditure Estimates by Mudgee Shire Residents (1993, 99)
Table Set G : Comparative Retail Performance of Mudgee with other Cities and Towns in Regional New South Wales (1991/92 Retail Census
Table Set H : Household Expenditure Survey by Household Income Group Australia (1993-1994)
Table Set J : Mudgee CBD : Assessment of Car Parking Supply and Utilisation (December 1999)

List of Figures

Figure 1 : General Location of Mudgee
Figure 2 : District Catchment Area (December 1999)
Figure 3 : Regional Catchment Area
Figure 4 : Land Use (December 1999)
Figure 5 : Carparking Supply (December 1999)
Figure 6 : Mudgee Local Environmental Plan : Existing Zones
Figure 7 : Functional Precincts
Figure 8 : Strategic Principles for New Retail-based Development in the Mudgee CBD

EXECUTIVE SUMMARY

1. Study Objectives

The principal objective of the study is to *"undertake a thorough and comprehensive review of existing and likely future floorspace requirements for the Mudgee Town Centre, taking account of the regional role of the Centre and likely future residential and population growth in the district and regional catchment area."*

The Mudgee Town Centre is defined as the precinct bounded as follows (refer Figure 4):-

- to the north by Short Street;
- to the east by Lewis Street,
- to the south by Denison Street; and
- to the west by Perry Street.

Throughout the study the terms 'Mudgee Town Centre', 'Mudgee CBD (Central Business District)', and 'CBD' are used interchangeably.

The supporting objectives of the study were as follows:-

- to examine the structure and function of retail and commercial activities in the Mudgee Town Centre and to identify potential sites for the consolidation of retailing in the Town Centre;

- to provide policy advice and recommendations to Council on medium and longer-term retail floorspace requirements to meet the needs of the Town Centre, taking account of its regional service role. The assessments are required for the period 2000-2011 and 2000-2021;

- to assess current and likely future site requirements for retail and related commercial development in the Mudgee Town Centre for the time periods as indicated above;

- to prepare a strategic planning analysis of the Mudgee Town Centre;

- to prepare an assessment of car parking demand and supply in the Mudgee Town Centre;

- in this context to evaluate the suitability of the Mortimer Street carpark site (refer Figure 4) as a locality for a future retail development.

In preparing assessments of the Mudgee Town Centre the Consultants shall have regard to planning and strategic policy for the Town Centre in relation to its principal uses and precincts, including for example:-

- traffic and circulation;
- open space areas;
- core commercial area;
- supporting services area;
- residential areas;
- historic buildings, streetscapes and precincts;
- car parking requirements.

2. Study Process

In undertaking the Mudgee Retail Study a series of surveys, reviews, analyses and planning assessments were undertaken. These included the following:-

- assessment of existing retail floorspace supply in Mudgee Shire;
- conduct of the Mudgee Town Centre Visitor Survey (3 & 4 December 1999);
- inventory of car parking supply and demand in the Mudgee Town Centre (3 December 1999);
- land use survey and inventory in the Mudgee CBD (December 1999);
- historic review, analysis and forecasts of residential development, households and population growth in the Shire;
- analyses of patterns of consumer behaviour of Mudgee residents;
- assessments of historic rates of provision of retail floorspace in country and regional New South Wales and of current and future rates of provision in Mudgee Shire;
- forecasts of net additional retail floorspace requirements to meet the needs of the Shire and regional catchment area;
- functional analyses of the Mudgee CBD;
- analyses of car parking demand and supply in the Mudgee CBD;
- preparation of locational principles for new retail-based development in the Mudgee CBD;
- preparation of principles for the Mortimer Street car park site.

The Mudgee Retail Study has drawn a number of important conclusions and several recommendations. These are set out in Section 10 : Conclusions and have been restated below. They address the following issues:-

- regional role of Mudgee CBD;
- long term residential growth;
- additional demands for retail floorspace;
- recommended allocation of retail floorspace requirements for Mudgee Shire (1999-2011);
- locational principles for new retail-based development;
- principles for the Mortimer Street car park site.

3. Regional Role of Mudgee CBD

The Mudgee CBD provides an important retailing and services role for an area which extends beyond the Shire boundaries up to 75 kilometres from Mudgee. The regional catchment area (RCA) of Mudgee includes the localities of Dunedoo, Coolah, Cassilis and Merriwa in the north and Rylstone and Kandos in the south (refer Figure 3).

The key precinct, which contains the largest single concentration of regional retailing and service functions, is the retail core area of the Mudgee CBD (refer Figures 4, 7). As the Shire and surrounding districts continue to grow, there will be further demands for additional retail goods floorspace and a range of diversified commercial and professional services.

Council's LEP provides principles for the consolidation of retail and commercial activity in the CBD. In order to meet the growth requirements of the regional catchment area, this study, consistent with Council's LEP, provides strategic principles for the future extension of the retail core area to provide for new regional level retail and commercial facilities in the CBD.

4. Long Term Residential Growth

The Mudgee Shire has undergone significant residential and population growth over the past 30 years. Residential development and household and population forecasts undertaken for the study indicate that the current residential population, estimated at approximately 18,430 persons (year ended 30 June 1999), is forecast to grow to approximately 21,650 persons by 2011 and 24,360 persons by the year 2021.

Household growth is considered to be a more accurate measure of likely retail and services requirements (rather than population growth). Households are forecast to increase by approximately 25% between 1999 and 2011 and a further 18% between 2011 and 2021.

In summary, the analysis and forecasts show that long term sustained residential household and population growth for the Shire is likely over the period 1999-2021. This in turn provides a clearly defined basis for additional demands for retail and commercial services floorspace in the foreseeable future.

4. Additional Demands for Retail Floorspace

The study has found that there are likely to be requirements for a further 24,710m^2 gross leasable area of net additional retail goods and services floorspace to meet the needs of the Shire and regional catchment area over the period 1999-2021.

In the immediate period (1999-2006) net additional retail floorspace requirements for the Shire and regional catchment area are approximately 8,550m^2 gross leasable area (refer Table A). Of this quantum, the following requirements have been assessed:-

- for **food, groceries and liquor store facilities**: net additional retail floorspace requirements are approximately 3,080m^2 gross leasable area (gla);
- for **non-food retail goods outlets**: net additional retail goods floorspace requirements are approximately 2,980m^2 gla;
- for **retail services** net additional floorspace requirements are approximately 1,640m^2 gla;
- in addition, an allowance for vacant floorspace requires a further 850m^2 gla to be added to the system.

In each of the five year periods following 2006 to 2021, in excess of 5,000m^2 gla will be required as net additional retail floorspace for the Shire.

5. Recommended Allocation of Retail Floorspace Requirements for Mudgee Shire: 1999 - 2011

In order to maximise community and economic benefit it is recommended that:-

- there be sufficient flexibility in the allocations to allow for new major store types to develop in Mudgee subject to market interest. In the context of foreseeable requirements for Mudgee Shire, major store types for which there is a need and where market interest may be likely or possible include:

    - a standard sized supermarket of approximately **3,000m^2 gla** (out of the 4,250m2 gla available for supermarkets and related stores net additional floorspace required for the Shire over the period 1999-2011);

    - a small/medium-sized discount department store of approximately **3,500-4,500m2 gla** (out of the 5,400m2 gla available for non-food retail goods stores net additional floorspace required for the Shire over the period 1999-2011);

    - provision be made for the major store types to be developed in the Mudgee CBD subject to locational and development principles recommended in Section 7. This in turn will necessitate most of the floorspace requirements over the next decade to be developed in the Mudgee CBD.

The development of policy and supportive actions to ensure preference is directed to a development of new major store types is designed to maximise community benefit from the floorspace allocations, and within this context to maximise the viability and regional performance role of the Mudgee CBD.

6. Locational Principles for New Retail-based Development

It is recommended that the following locational and development principles form the basis for the realisation of CBD consolidation policies set out in Council's LEP (as amended, 1998). These are:-

- further improvements to the car parking resources, urban design and pedestrian amenity of the retail core area;
- contiguous expansion of the retail core area in a southerly direction with priority for sites most proximate to Mortimer Street (refer Section 7.3, Figure 8);
- conservation and amenity protection of historic residential areas of Mudgee which are located within and adjoin the Mudgee CBD;
- protection of riverine and open space areas;
- consolidation and inter-linking of the Town Centre's car parking system.

7. Principles for the Mortimer Street Car Park Site

The Mortimer Street car park site does not at present contribute to any measurable extent either to car parking supply or to the amelioration of car parking demands in the Town Centre. It is well placed strategically to form an important contributory site for the further expansion of future major retail and commercial development in the Mudgee CBD, subject to the following planning and development principles:-

- for the purposes of a new major retail development, the Mortimer Street car park site should be considered as part of a development precinct extending northward from the subject site to Mortimer Street and westward to Church Street (refer Figure 8);

- any development for the subject site should thus be linked to an integrated retail/commercial development with an active frontage along relevant sections of Church and Mortimer Streets (refer Figure 8);

- it is recommended that a Development Control Plan (DCP) be prepared for the development precinct as defined above. It is further recommended that the Development Control Plan be directed to achieve the following:-

  - development of active and integrated shopping and retail services frontages along relevant sections of Mortimer and Church Streets;

  - provision for an anchor store or stores (eg. a new supermarket or small discount department store);

  - provision for a landscaped on-grade car park at the rear of this development, with planned pedestrian pathways from the car park to the retail development;

  - provision for accessways to the car parking area from Mortimer, Church and Gladstone Streets;

  - provision for landscaped buffers along the southern and eastern edges of the car parking area to protect the existing residential area;

  - provision for safe pedestrian access across Church and Mortimer Streets providing direct linkage to adjoining commercial areas and to the established retail core area (the pedestrian access locations should form part of a wider pedestrian network system for the CBD).

1. Introduction

1.1 Study Context

In November 1999 Ratio Consultants Pty Ltd was engaged by Mudgee Shire Council to *"undertake a thorough and comprehensive review of existing and likely future floorspace requirements for the Mudgee Town Centre taking account of the regional role of the centre and likely future residential and population growth in the district and regional catchment area"* (Refer correspondence to Mr Garry Styles, Assistant General Manager, Mudgee Shire Council, 30th November 1999).

For the purposes of the study the Mudgee Town Centre is defined as the precinct bounded as follows (refer Figure 4):-

- to the north by Short Street;
- to the east by Lewis Street;
- to the south by Denison Street; and
- to the west by Perry Street.

Throughout the Study the terms 'Mudgee Town Centre', 'Town Centre', 'Mudgee CBD (Central Business District)' and 'CBD' are used interchangeably.

The supporting objectives of the study were as follows:-

- to examine the structure and function of retail and commercial activities in the Mudgee Town Centre and to identify potential sites for the consolidation of retailing in the Town Centre;

- to provide policy advice and recommendations to Council on medium and longer-term retail floorspace requirements to meet the needs of the Town Centre, taking account of its regional service role. The assessments are required for the period 2000-2011 and 2000-2021;

- to assess current and likely future site requirements for retail and related commercial development in the Mudgee Town Centre for the time periods as indicated above;

- to prepare a strategic planning analysis of the Mudgee Town Centre;

- to prepare an assessment of car parking demand and supply in the Mudgee Town Centre;

- in this context to evaluate the suitability of the Mortimer Street carpark site (refer Figure 4) as a locality for a future retail development.

In preparing assessments of the Mudgee Town Centre the Consultants shall have regard to planning and strategic policy for the Town Centre in relation to its principal uses and precincts, including:-

- traffic and circulation;
- open space areas;
- core commercial area;
- supporting services area;
- residential areas;
- historic buildings, streetscapes and precincts;
- car parking requirements.

2. Study Process

2.1 Principles in the Determination of Retail Floorspace Requirements

In the assessment of retail floorspace requirements there are several issues that need to be determined and these establish the scope of work and study process. The issues are:-

- **retail floorspace supply.** This is the existing distribution of retail goods floorspace taking account of:-
  - the land use structure and configuration of the principal activity centre under study (in this case the Mudgee Town Centre);
  - the hierarchy of activity centres/precincts in the area under study (in this context, it encompasses locations of retail activities outside the Mudgee Town Centre);
  - role of the Mudgee Town Centre and other activity centres/precincts in the Shire, including consideration of the state of/regional competitiveness of the Shire's principal retail facilities;

- **residential development, household and population trends.** A retail needs assessment is essentially an analysis of likely **future** retail floorspace requirements. In this regard an important consideration is the likely future resident population. Analyses which are required to be undertaken include:
  - historic patterns of residential development;
  - relationship of occupied dwellings to total residential dwelling stock;
  - historic and projected growth in resident households;
  - long term and future trends in persons per occupied dwellings;
  - historic and likely future resident populations in the Shire.

- **current and forecast retail floorspace needs**, including:-
  - historic rates of provision of retail floorspace in the Shire (compared to other cities, towns and regional areas);
  - historic and current income distributions of households resident in the Shire;

- historic and current levels of household retail expenditure in the Shire taking account of household income and retail expenditure profiles updated and standardised for the Mudgee area;
- retail turnover density requirements for stores (measured as annual turnover per square metre of gross leasable area of floorspace);

In preparing an assessment of retail floorspace requirements for Mudgee Shire and the Mudgee Town Centre Ratio Consultants have undertaken the following assessments and analyses:-

- prepared a review of planning, demographic and market reports, Council policy documents and papers;
- reviewed existing retail floorspace in Mudgee Shire;
- prepared a land use inventory for the Mudgee Town Centre;
- co-ordinated an assessment of car parking supply and demand in the Mudgee Town Centre (undertaken 3 December 1999);
- co-ordinated an in-centre survey of visitors to the Mudgee Town Centre (in this report the survey is referred to as the Mudgee Town Centre Visitor Survey. It was undertaken 3, 4 December 1999);
- assessed historic information on residential development approvals in Mudgee Shire;
- prepared forecasts of residential development, households and population in the Shire over the period 1996-2021;
- defined the Mudgee Town Centre regional catchment area (from the results of the Mudgee Town Centre Visitor Survey, 3, 4 December 1999);
- prepared assessments of escape and inbound retail expenditures (including a review of a study prepared by Metra Pty Ltd, 1993);
- provided a comparative assessment of historic rates of retail floorspace provision in the Shire and likely requirements for the forecast period (1999-2021);
- prepared an assessment of retail needs for the Mudgee Town Centre taking account of:
    - its role and regional catchment area (refer to note on following page);
    - net inbound expenditures to the Mudgee Town Centre;

- patterns of escape expenditure by residents of Mudgee Shire (that is, expenditures made by Mudgee Shire residents at centres and localities outside the Shire);
- income distribution of households resident in the Shire;
- patterns of retail expenditure in relation to household income.

For the purposes of the study, the Mudgee Town Centre regional catchment area is defined as the area from which the Town Centre draws its regular trade. This is shown in Figure 3 and is based on the results of the Mudgee Town Centre Visitor Survey (3 & 4 December 1999). The regional catchment area (RCA) extends beyond the Shire boundaries to include Rylstone and Kandos south of the Shire and the localities of Dunedoo, Coolah, Cassilis and Merriwa north of the Shire.

The preparation of a strategic analysis of the Mudgee Town Centre took account of:-

- current patterns of land use and in particular the retail core area of the Town Centre;
- supporting service areas which adjoin the retail core area;
- riverine areas north of Short Street;
- existing residential areas;
- existing patterns of open space and school and church facilities and other institutional uses;
- existing major car parking resources;
- walking distances within the retail core area and adjacent precincts.

3. Household and Population Forecasts

3.1 Residential Development Patterns

In preparing an assessment of future household and resident population in the Shire, a detailed review has been undertaken of:-

- net changes to total dwelling stock over the period 197–1996;
- spatial changes in the net growth in dwelling stock over the 25-year period 1971-1996;
- historic trends in residential approvals over the period 1986-87 to 1997-99.

The assessments showed a remarkable level of consistency in the long-term net increase in residential development stock when expressed on an annual basis. Table B7 shows that:-

- over the 15-year period **1971-1986** total dwelling stock in the Shire increased by approximately **160** dwellings per annum;
- over the 10-year period **1986-1996** total dwelling stock in the Shire increased by approximately **142** dwellings per annum;
- over the entire 25-year period **1971-1996** total dwelling stock in the Shire increased by approximately **153** dwellings per annum.

An examination of dwelling approvals in the Shire over the period 1986-87 to 1997-99 showed pronounced cyclical trends in dwelling unit approvals from a high of about 159 per annum over the period 1998-90 to a low of about 90 per annum over the period 1994-96. The most recent information shows that dwelling unit approvals are rising and short-term forecasts based on recent triennial trends would indicate annual approvals in excess of 140 dwellings per year in the period 2000-2005 (refer Table B9).

In preparing a forecast of residential housing stock for the Shire, the Consultants have taken account of the current level of dwelling unit approvals (at about **110-120** for the period 1997-99) and the long term annual net increase in dwelling stock (**153** dwellings per annum over the period 1971-1996). The forecast set out in Table B6 shows growth in net additional housing stock progressively increasing from about 110 per annum in 1997 to about 140 per annum for the years 2000 and 2001 and rising to about 160 per annum by the year 2003 and 170 per annum by the year 2010.

The spatial distribution of residential development was established through an analysis undertaken of net changes to dwelling stock for the following areas in the Shire:-

- Mudgee Township;
- Gulgong Township;
- Rural localities (that is, all other localities in the Shire).

The analysis shows that the proportion of net additional dwelling stock located in Mudgee Township (as a proportion of total dwelling stock in the Shire) has progressively increased from 1971. The analysis also showed that there has been a marginal decline in the proportion of additional dwelling stock located in the Gulgong Township and a significant decline in the proportion of additional dwelling stock located in rural localities. For the purposes of the forecasts of residential development by component area in the Shire, the spatial distributions of dwelling and approvals assessed for the period 1996-1999 have been used as the guide for future spatial distributions of residential activity. These are as follows (refer Table B8):-

- Mudgee Township : approximately 53.5% of (Mudgee Shire's) dwelling stock net increase;

- Gulgong Township : approximately 7.5% of (Mudgee Shire's) dwelling stock net increase;

- Rural localities : approximately 39% of (Mudgee Shire's) dwelling stock net increase.

The forecasts of net additional dwelling stock by major component area in the Shire are set out in Table B4 and the forecasts of total dwelling stock in the Shire are set out in Table B3.

An analysis of occupied dwellings in the Shire shows consistent proportions of dwelling stock have been occupied over the historic period under study (1971-1996). On this basis forecasts in occupied dwellings and households have been prepared for the Shire (Table B2).

3.2 Forecasts of Households and Population (1996-2021)

The forecasts of resident households, household size and population are set out in Tables B2, B5 and B1. The forecasts show that:-

- **resident households** in the Shire are forecast to grow from approximately **6,380 in 1996** to approximately **8,320 by 2011** and approximately **9,850 by the year 2021** (refer Table B2);

- **the household forecasts** indicate a marginal long term shift in the concentration of households in the Mudgee Township (from about 49% in 1996 to about 51% by the year 2011 to approximately 53% by the year 2021);

- **average household size** (broadly measured as persons per occupied private dwelling) is forecast to fall from approximately **2.8 persons per occupied private dwelling in 1996** to some **2.6 persons per occupied dwelling in 2011** and to approximately **2.47 persons per occupied private dwelling by the year 2021** (refer Table B5). The forecasts indicate a long term fall of about 11.8% in average household size in the Shire over the 25-year period 1996-2021, or about 0.4% per annum. The ongoing fall in household size which is a trend forecast for the Shire is consistent with average household size trends in other localities in Australia;

- **the resident population** of the Shire is forecast to increase from approximately **17,660 persons in 1996** to about **21,650 persons in 2011** and some **24,360 persons by the year 2021** (refer Table B1);

A comparative assessment has been made of the results of the population forecasts for the Shire undertaken by Ratio Consultants and earlier forecasts prepared by the New South Wales Department of Planning (1994) and a forecast prepared by Hoynes, Wheeler and Thorne Pty Ltd in a previous study for the Shire (1995). The results of the comparison are shown in Table B10. These indicate that the Ratio forecasts lie between the projections prepared by the Department of Planning and the Hoynes Wheeler and Thorne projections.

In summary, the forecasts of households and population for the Shire take full account of long term historic trends in the Shire over the 25-year period 1971-1996 and provide a mid-range forecast in the context of earlier projections prepared by the Department of Planning and a private consultancy.

4. Current Retail Floorspace in the Shire

As part of the study, the Consultants have utilised a detailed inventory of existing retail floorspace in the Shire prepared by Council. The results are set out in Table D. It can be seen that:-

- total occupied retail floorspace for **food, groceries and liquor stores** was approximately **9,719 m^2 gross leasable area** for the Shire at December 1999;

- total occupied retail floorspace **for non-food retail goods stores** was approximately **23,839m^2 gross leasable area** for the Shire at December 1999;

- total occupied **retail and professional services floorspace** was approximately **12,917m2 gross leasable area** for the Shire at December 1999;

- total **vacant floorspace** in the Shire was approximately **3,300m^2 gross leasable area**, amounting to **less than 3%** of total retail, commercial and manufacturing floorspace.

The inventory of retail floorspace shows that the core retail stores are concentrated in the Mudgee CBD. The inventory shows that:-

- about **86% of supermarket and grocery store** occupied floorspace in the Shire is concentrated in the **Mudgee CBD**;

- about **79% of department and general store floorspace** is concentrated in the Mudgee CBD;

- some **91% of clothing and soft goods retailing floorspace** is located in the Mudgee CBD;

- **some 67% of professional services**, approximately **83% of professional services** and **78% of banks** are concentrated in Mudgee's CBD.

By contrast, only about 44% of furniture, household and appliance retailing floorspace is located in Mudgee CBD and only about 38% of general commercial and manufacturing floorspace is located in the CBD.

The inventory clearly shows that the regional retailing functions for the Shire are concentrated in the Mudgee CBD, with the exception of bulky goods outlets. It also shows that there are no comparable retail activity centres in this context. Gulgong provides local retail and service functions of a fundamentally different order of service and provision than the Mudgee CBD, which is the Shire's regional centre.

5. Assessed Role, Performance and Needs of the Mudgee CBD

The Town Centre Visitor Survey (December 1999) provided a clear indication of the current role, performance and needs of the Mudgee CBD. Some 307 respondents were interviewed over two days (3 & 4 December 1999). The survey provided important information on:-

- the catchment of the CBD;
- mode of travel;
- length of stay;
- frequency of visits;
- activities undertaken in the CBD;
- stores and facilities frequented;
- new stores / services required;
- other improvements required to the CBD;
- destinations of escape expenditure by Shire residents.

5.1 Regional Catchment Area

The Town Centre Visitor Survey provided an accurate basis to define the CBD's regional catchment area. The localities from which visitors were drawn are set out in Table Set E and shown in Figure 3. It can be seen that about 66% of visitors are drawn from the Mudgee Township and surrounding localities. A further 30% of visitors are drawn from an area extending beyond the Shire boundaries and including the localities of Rylstone and Kandos in the south and Dunnedoo, Coolah, Cassilus and Merriwa in the north.

The Town Centre Visitor Survey showed that about 7% of visitors to the Mudgee CBD are drawn from beyond the Shire boundaries. A detailed analysis of the results of the 1991/92 Census of Retail and Selected Service Establishments, together with an analysis of the household expenditure patterns in the Shire, found that approximately 12% of retail goods turnover is supported by areas beyond Mudgee Shire (refer Table H.15, column 5).

5.2 Patronage Patrons and Role of the Mudgee CBD

The Town Centre Visitor Survey (December 1999) provided information on patterns of visitation to the Mudgee CBD and afforded further explanation on the retail and service role of the CBD. The survey showed:-

- that the CBD provides for both daily shopping and weekly/less frequent shopping by Mudgee residents. More than 62% of visitors to the CBD frequented the precinct daily or several times a week and a further 27% visited the CBD on a weekly basis. A total of some 90% of visitors to the CBD were patronising the precinct on a weekly or more frequent basis;

- the Mudgee CBD performs the role of a village centre, with approximately 25% of visitors walking to the precinct from surrounding neighbourhoods (refer Table Set E). This result has implications for the future planning of pedestrian spaces and pathways in the CBD and adjoining areas;

- in common with many regional central business districts, the Mudgee CBD provides a multiplicity of roles for the local and regional community. Its primary attraction is as a shopping centre (approximately 77% of respondents were visiting the CBD for shopping purposes). It is also an important location for work, personal services, recreation, leisure and entertainment; and medical, professional and educational services (refer Table Set E, Q5);

- that also in common with other regional central business districts, particular stores and facilities/facility types serve as major attractors to the Mudgee CBD. The two significant supermarkets in the CBD, together with the precinct's department store and discount department store, were the major retail attractors. Other significant attractors included the banks, newsagencies, post office, pharmacies, hardware stores and library. The location of these attractions and their concentration into the retail core area of the Mudgee CBD provides an important basis for the future strategic planning of the precinct (refer Section 8).

5.3 Patterns of Escape Expenditure

A particular characteristic of Mudgee Shire which has been observed and analysed is the significant level of escape expenditures which are concentrated among a range of non-food retail goods and selected professional services. Escape expenditures relate to purchases made by Shire residents at locations outside the Shire.

Analysis was undertaken of an earlier survey conducted by Metra Pty Ltd (refer "*Mudgee Retail Outshopping Study*", 1993). The analysis showed that there were significant levels of escape expenditures by Mudgee Shire residents for retail purchases to destinations outside the Shire. The escape expenditures related to a number of household goods purchases, together with professional services. On the basis of information provided by the Metra survey, estimated levels of escape expenditure by Shire residents were in the range of 13% for white goods to approximately 30% for children's clothing and 34% for furniture and furnishings (refer Table F1).

The Town Centre Visitor Survey (December 1999) provided further information on the attraction of surrounding regional cities and reasons for visiting these cities. The survey showed that Bathurst, Dubbo and Orange were the leading destinations for visitation by Shire residents. Although shopping was the single most important reason for visitation to the three cities, the survey found that other important reasons for visitation included social and sporting events, medical needs and requirements for professional services and/or combinations of these needs (refer Table Set E, Q13).

Analysis of the Visitor Survey showed that the relatively high attraction of Bathurst, Dubbo and Orange which prevailed for general patterns of visitation by Shire residents, also prevailed for patterns of shopping. It was found that the three cities combined accounted for about 84% of outshopping by Shire residents (refer Table F2).

The most rigorous quantitative assessment which could be undertaken of escape expenditure was made utilising a comparative analysis of the 1991/92 Census of Retail and Selected Service Establishments with estimates of household retail expenditure by Shire residents, made from the Household Expenditure Survey (ABS, 1993/94) adjusted to 1991/92 prices and household income characteristics of Mudgee Shire. The analysis shows that about 24% of non-food retail goods expenditures by Shire residents is escape expenditure; that is, it is directed to locations outside the Shire (refer Table H15, column 7). For all retail goods, the estimated average level of escape expenditure from the Shire is about 12%.

The significant level of escape expenditures for non-food retail goods clearly has impacts in that it limits available retail trade to non-food retail stores in the Shire and, more importantly, limits investment for new store development. The possible future development of a new discount department store or improvements to the existing department and general stores may be able to reduce the level of escape expenditures from the Shire. However, opportunities may be constrained by the current and projected resident populations in the Shire (refer Section 3), the relative proximity of major regional cities and ingrained patterns of shopping behaviour (in this context accepted patterns of outshopping to regional cities by Mudgee residents).

In the context of the provision of a retail strategy for the Shire, the principle has been adopted to provide an allocation of non-food retail goods floorspace which takes account of historic rates of provision in country and regional New South Wales and the household income distribution of Shire residents. The retail strategy provides floorspace opportunities for new store development. The realisation of these opportunities will depend in large part on outside market interest and changes to existing operations by major non-food retail operators in Mudgee.

5.4 Retail and Amenity Needs of the CBD

The Town Centre Visitor Survey (December 1999) provided important information on retail and other amenity needs of the CBD. The need for new major stores was clearly identified in the survey (refer Table Set E, Q8). The survey found that about 34% of respondents indicated preference for a new supermarket, about 23% for a new shopping centre/department store and about 19% for a discount department store. In the context of these types of surveys, these percentages are high and clearly indicate a strong preference for these types of facilities.

In terms of general amenity improvements to the CBD the survey showed strong support for improved parking (approximately 20% of respondents) together with improvements to roads and provision of new rest rooms, baby change rooms (9-10%) and improvements to street furniture and urban design around the CBD (4-7%).

In summary, the Visitor Survey clearly indicated a preference for new major retail attractors in the CBD and in particular a new supermarket and discount department store/department store. The need for additional/improved car parking dominated visitor preferences for amenity improvements to the CBD. The retail facility preferences are meaningful in the context of the retail strategy, where long-term retail floorspace requirements for the CBD have been determined and recommended allocations have been made. In the context of fully integrating new retail facilities in the CBD, the amenity requirements are important.

6. Assessment of Retail Floorspace Requirements (1999-2021)

The assessment of retail floorspace requirements for Mudgee Shire takes account of:-

- historic and future supportable rates of provision of retail floorspace in the Shire;
- patterns of residential development and future households and population in the Shire.

6.1 Rates of Provision of Retail Floorspace

In analysing the adequacy and required future provision of retail floorspace in the Shire, an assessment has been made of the historic rates of provision of retail floorspace in the Shire. Table C shows the actual rates of provision of retail goods and services floorspace from the 1991/92 Census of Retail and Selected Service Establishments and later studies by Ratio Consultants (1997/98 and December 1999). It will be noted that:-

- in1991/92 the actual rate of provision of supermarkets, food, grocery and liquor stores and food specialty stores was **1.53m^2** gross leasable area (gla) per resident household in country and regional New South Wales (that is, in the State of New South Wales outside the Sydney Statistical Division);[1]
- the actual rate of provision of supermarket, grocery store, liquor store and specialty food store floorspace in Mudgee Shire at December 1999 was **1.28m^2 gla per resident household**. This assessed rate of provision takes account of net inbound visitation to the Shire equal to about **9%** of food sales (determined on the basis of the Town Centre Visitor Survey). This is a conservative estimate. Analysis of turnover and expenditure patterns from the 1991/92 Retail Census indicates that for supermarkets, grocery stores, liquor stores and specialty food stores, turnover generated from beyond Mudgee Shire may be as high as 15% (refer Table H15, column 5).

[1] For the purposes of establishing actual rates of provision of supermarket, food and liquor store floorspace, the 1991/92 Census of Retail and Selected Service Establishments was not sufficiently accurate for Mudgee Shire. The detailed floorspace inventory undertaken by Council (December 1999) clearly showed that supermarket, grocery store, liquor store and food specialty floorspace estimates provided by the 1991/92 Retail Census were significantly in excess of existing floorspace as surveyed by Council at December 1999. No closures of any significance in this category of floorspace were identified in the interim period (1991/92-1999). Given the apparently erroneously high estimate of supermarket and related food floorspace provided at the 1991/92 Retail Census for Mudgee Shire (**12,500m^2** gla, refer Table G3), compared to the total floorspace identified for this category in the survey undertaken by Council in December 1999 (**9,719m^2** gla, refer Table D), the consultants have taken the view that the 1991/92 Retail Census could not be used for purposes of establishing actual rates of floorspace provision in Mudgee Shire.

- the actual rate of provision of supermarket, grocery store, liquor store and specialty store floorspace assess for Mudgee Shire at December 1999 is of a similar order to the actual rate of provision of this category of floorspace assessed for Bathurst City and its regional catchment area in 1997/98. The rate of provision for this category was **1.2m^2 gla per resident household** (refer Table C);

- on the basis of the current provision of occupied supermarket and related retail floorspace in the Shire and its regional catchment area, and on the basis of the existing actual rates of provision which prevailed in country and regional New South Wales in 1991/92, it is recommended that the proposed rate of provision for **supermarkets, grocery stores, liquor stores and specialty food stores** be **1.5m^2 gla per resident household** (for the Shire and for supporting populations of the Mudgee CBD outside the Shire) (refer Table C);

- the recommended rate of provision for supermarkets and related stores is conservative. The rate of provision of supermarkets and related stores which are supportable by the resident population can be calculated taking account of retail expenditures by households resident in the Shire, together with an assessment of retail turnover density requirements for this store category. The results of this analysis are shown in Table H13. It can be seen that average retail expenditures per resident household for food, groceries and liquor amounted to about **$9,914** per annum for Mudgee households at 1998/99 prices. Retail turnover density requirements for supermarkets and related stores amounted to **$6,144 per m^2 gla** per annum at 1998/99 prices. The amount of retail floorspace per resident household which can be economically supported may be calculated by dividing average household expenditure for food and groceries by retail turnover density. This analysis shows that **1.61m^2** gla per resident household of supermarket, liquor store and food specialty store floorspace is supportable by resident households, taking account of household income characteristics and retail turnover density requirements;

- to summarise thus far, the actual rate of provision of supermarkets and related store types which existed in country and regional New South Wales in 1991/92 was **1.53m^2** gla per resident household. For purposes of future floorspace requirements for **supermarkets and related stores**, the rate of **1.5m^2** gla per resident household is proposed for the Shire. This rate of provision is about the same which existed for country and regional New South Wales in 1991/92 and appreciably less than the rate of provision which could be economically supported by resident households (**1.61m^2 gla per resident household**). The recommended rate is a conservative rate and is well within the capacity of resident households;

- the actual rate of provision of **non-food retail goods floorspace** which existed in country and regional New South Wales at the 1991/92 Retail Census was **2.92m^2** gla per resident household (refer Table C). By comparison, the actual rate of provision of non-food retail goods floorspace in Mudgee Shire was about **3.1m^2 gla per resident household** taking account the regional catchment area of the Shire, but excluding any allowance for escape expenditure. If allowance is made for patterns of escape expenditure, the actual rate of provision is no less than **3.53m^2 gla per resident household** (refer Table C);

- the recommended rate of provision for future **non-food retail goods floorspace for the Shire** is **3.1m^2 gla** per resident household. This is marginally in excess of the actual rate of provision which prevailed in country and regional New South Wales in 1991/92 and at the same rate which current exists in the Shire and its regional catchment area, discounting allowances for escape expenditures. As indicated in Section 6.3, the principle of the non-food retail goods floorspace rate of provision is to provide realistic opportunities for new store development and for the consolidation/expansion of existing stores. The rate of provision is conservative in that it does not provide for any real growth in the current rate and ensures that future floorspace allocations will be dependent upon household growth;

- the actual rate of provision of **retail services** floorspace in Mudgee Shire and its regional catchment area was approximately **1.7m^2 gla** per resident household. This rate of provision was of the same order as the actual rate of provision in Bathurst City and its regional catchment area in 1997/98 (1.63m^2 gla per resident household, refer Table C);

- the recommended rate of provision for **retail services** floorspace in Mudgee Shire and its regional catchment area is **1.7m^2 gla** per resident household. Thus, the recommendation is to hold the rate which currently exists for the foreseeable future. An allowance should be made for future growth in floorspace allocated to retail services in direct proportion to future household growth in the Shire and its regional catchment area.

6.2 Future Retail Floorspace Requirements for the Shire (1999-2021)

As indicated above, the recommended rates of provision for future retail floorspace in the Shire are as follows:-

- **for supermarkets, grocery stores, liquor stores and specialty food stores : 1.5m^2 gla per resident household in the Shire and regional catchment area**;
- **for non-food retail goods stores : 3.1m^2 gla per resident household in the Shire and regional catchment area**;
- **for retail services : 1.7m^2 gla per resident household in the Shire and regional catchment area**.

Taking account of the household forecasts for the Shire (Section 3, refer also Table B2), and the above rates of provision and allowing for 9% of inbound turnover support from areas outside the Shire (based on the Town Centre Visitor Survey) then the retail floorspace requirements for the Shire may be readily calculated.

The future floorspace requirements for the Shire are set out in Table A1 by principal retail category and by future time period. The Table shows that:-

- for **supermarkets, grocery stores, liquor stores and specialty food stores** total requirements of floorspace for the Shire and its regional catchment area will increase from about **9,460m^2 gla at December 1999** to approximately **12,540m^2 by 2006** and **16,240m^2 by 2021**;
- for **non-food retail goods stores**, total floorspace requirements for the Shire and its regional catchment area will increase from **22,940m^2 gla at December 1999** to approximately **25,920m^2 gla by 2006** and **33,560m^2 by 2021**
- for **retail services,** total floorspace requirements for the Shire and its regional catchment area will increase from **12,580m^2 gla at December 1999** to **14,220m^2 gla by 2006** and **18,400m^2 by 2021;**
- provision for future vacant floorspace will rise from about **1,350m^2 gla at December 1999** to about **2,200m^2 gla by the year 2006** and some **2,840m^2 gla by the year 2021**;[2]

[2] The inventory of retail and commercial floorspace for the Shire undertaken in December 1999 showed that about 2.9% of total floorspace was vacant at the time of the survey. This is a relatively low rate in comparison to other regional cities. In providing a forecast of future retail floorspace requirements an allowance has been made for 4% vacant floorspace. This is a normal rate of provision for this type of analysis.

- taking account of all of these requirements, **total retail goods and services floorspace needs for the Shire** will rise from approximately **46,330m2 gla at December 1999** to about **54,880m2 gla by 2006** and about **71,040m2 gla by 2021**.

In summary, net additional retail floorspace requirements for the Shire have been assessed as follows (refer Table A1):-

- for the period **1999-2006**, a total quantum of approximately **8,550m^2** gla will be required to meet the needs of the Shire. Of this amount:

  - some **3,080m^2** gla will be required for an additional supermarket and related floorspace;
  - some **2,980m^2** gla will be required for additional non-food retail goods floorspace;
  - an amount of **1,640m^2** gla will be required for additional retail services floorspace;
  - an amount of **850m^2** gla is required for additional vacant floorspace allocation.

- for the period **2006-2011** a total of **5,110m^2** gla will be required to meet the needs of the Shire. Details by major retail category are set out in Table A1;

- for the period **2011-2021** a total of **11,050m^2** gla will be required to meet the needs of the Shire. Details by major retail category are set out in Table A1.

6.3 Recommended Allocation of Retail Floorspace Requirements for Mudgee Shire (1999-2011)

As the foregoing analysis has indicated, over the period **1999-2011** a total of **13,660m^2 gla** will be required as **net additional retail floorspace** to meet the needs of the Shire.

In order to maximise community benefit it is recommended that:-

- there be sufficient flexibility in the allocations to allow for new major store types to develop in Mudgee subject to market interest. In the context of foreseeable requirements for Mudgee Shire, major store types for which there is a need and where market interest may be likely or possible include:

  - a standard sized supermarket of approximately **3,000m^2 gla** (out of the 4,250m^2 gla available for supermarkets and related stores net additional floorspace required for the Shire over the period 1999-2011);

- a small/medium-sized discount department store of approximately **3,500-4,500m² gla** (out of the 5,400m² gla available for non-food retail goods stores net additional floorspace required for the Shire over the period 1999-2011);

- provision be made for the major store types to be developed in the Mudgee CBD subject to locational and development principles recommended in Section 7. This in turn will necessitate most of the floorspace requirements over the next decade to be developed in the Mudgee CBD.

The effects of concentrating a substantial proportion of both food and non-food floorspace allocations to the CBD and to ensure preference is directed to a development of new major store types, will be to maximise community benefit from the floorspace allocations and within this context to maximise the viability and regional performance role of the Mudgee CBD.

7. Strategic Principles and Guidelines for the Mudgee CBD

Retail floorspace requirements for Mudgee Shire have been determined on the basis of a consideration of retail floorspace provision requirements and future household formations in the Shire over the period 1999-2021. The assessments also take account of patterns of net inbound trade, the regional role of the Mudgee CBD and patterns of escape expenditures by Shire residents.

In order to maximise community and economic benefits from the allocations it is important that a strategic framework be provided to accommodate future retail needs in the CBD, and in particular for new major store types which will further consolidate the regional service role of the Mudgee CBD. In the context of this study, store types which are likely or realistic possibilities are a new major supermarket for the Mudgee CBD and a small discount department store which may be a remodelling of an existing store.

Consistent with the requirements of the Brief, the strategic analysis of the CBD has proceeded through several steps:-

- a detailed land use inventory has been undertaken (December 1999);
- on this basis a functional analysis of the CBD has been carried out;
- the Mudgee Local Environmental Plan (August 1998) and strategic objectives for the CBD were taken into account, in terms of establishing general areas within which expansion of the existing core area could be reasonably considered, and in terms of ruling out areas where retail/commercial development was clearly not suitable;
- strategic principles for the consolidation of the CBD were developed, taking account of:
    - the retail core area of the CBD;
    - the locations of major attractors in the CBD;
    - the locations of major off-street car parks;
    - potential development sites close to the retail core area;
    - the need to achieve a compact CBD;
    - the need to provide commercial focus and contiguity to the prime retail street (Church Street).

7.1 Land Use Analysis of the Mudgee CBD

A detailed inventory of land uses in the CBD was undertaken by Council in December 1999. A land use classification system developed by Ratio Consultants was applied to the inventory. The distribution of principal land uses is shown in Figure 4. It will be noted that the principal retail and commercial activities are focused in the area between the Town Centre complex and Perry Street and between Mortimer Street and Short Street. A bulky goods and services area was identified south of Gladstone Street, extending through to Denison Street.

7.2 Functional Analysis of the CBD

The distribution of land uses provided a basis for the functional analysis of the Mudgee CBD. The functional analysis provides a simplified view of the structure and function of the Town Centre. Several distinctive precincts have been identified. These are set out in Figure 7 and listed below:-

- **Retail Core Area**. This area extends along Church Street between Mortimer and Market Street and along the south side of Market Street to Perry Street. It includes the City's four major retail attractors (Woolworths, Bi Lo / Town Centre Complex, Fosseys, Kellett's).

  The Retail Core Area provides the Town Centre's major regional retailing, office and other service attractions. It is the prime activity focus of the CBD.

- **Supporting Services Areas**. Two substantial areas adjoin the Retail Core Area:

  - to the north of the Retail Core Area an extensive supporting services area provides a range of civic, institutional and hospitality functions;

  - to the south and west of the Retail Core Area a supporting services precinct extends along Mortimer and Perry Streets and includes a range of retail service and office functions, the Soldiers Club and a number of Government, civic and other institutional uses.

- **Southern Commercial Precinct**. South of the Supporting Services Area, a diversified services and bulky goods precinct extends along Church Street south to Denison Street. The area contains a number of professional activities, the Mitre 10 store, a motel and other bulky goods and trade activities.

- **Inner City Residential Precincts**. The above precincts make up the commercial areas of the Town Centre. The principal component of the non-commercial uses is made up of historic residential areas which are essentially focused on the southern, western and north-eastern areas of the Town Centre.

7.3 Mudgee Local Environmental Plan (1998)

The Mudgee Local Environmental Plan (LEP) establishes the zoning system, policies and principles for land development in the Shire. It provides important principles for the future development of the Mudgee CBD. All of the retail and commercial areas in the Town Centre (as defined in Section 1.1 in this report) fall within the Zone **No. 3(a) (Business)** (refer Figure 6). The objectives of this zone are:-

"(a) to maintain the central business district of the town of Mudgee as the retailing and commercial focus of the local government area of Mudgee, and

(b) to improve and consolidate the town centre of Gulgong, and

(c) to encourage the safe and efficient movement of pedestrian and vehicular traffic, and

(d) to permit the development of a wide range of land uses which are ancillary to or supportive of the retail and service functions of the towns, and

(e) to encourage relocation of incompatible development out of the town centres and to make sites available predominantly for commercial, retail and community development that is sympathetic to the individual character of the respective town centres." (Mudgee Local Environmental Plan, 21 August 1998)

Proposed Amendment No. 1 to the Mudgee Local Environmental Plan states that Zone No. 3(a) will be amended to include additional objectives which indicate:-

- **Section 2(j)**

  (i) "Council's desired direction of commercial growth of Mudgee's central business district;

  (ii) Council's intention to concentrate major commercial undertakings to Mudgee's CBD."

The amendment to the objectives to Zone No. 3(a) (Business) is set out in Section 5 of proposed Amendment No. 1. The additional objectives which form the amendment are (refer Mudgee Local Environmental Plan, 1998, Amendment No. 1, Section 5 (8)):-

"(f) to concentrate major commercial undertakings within the Mudgee CBD;

(g) to encourage Mudgee CBD growth in a southerly direction of the current CBD towards the Mudgee Railway Station and bounded by Lewis and Perry Streets."

7.4 Strategic Principles for Retail and Commercial Development

On the basis of the floorspace and functional analyses of the CBD, and taking full account of the policies, objectives and principles of the Mudgee Local Environmental Plan (1998), the following strategic principles have been set out in order to achieve optimal community and economic benefits for the Mudgee Town Centre. The principles are as follows:-

Progressive Improvements to the Retail Core Area

The retail core area of the Mudgee Town Centre is the most significant regional retailing and services precinct in the CBD. A fundamental principle for the future planning and management of the CBD is the need to identify integrated urban design, car parking and traffic management plans which can be progressively implemented to maintain and improve the regional status, presentation and quality of the precinct. In particular, the development of an integrated improvements plan for the retail core area should provide for:-

- additions to off-street car parking resources where possible;
- improvement/provision of landscaped pedestrian areas in Market, Church and Mortimer Streets and integrated with any car parking improvements to Byron Place;
- improvements to street lighting and street furniture;
- facilitation of a high quality pedestrian pathway system within the retail core area and connecting the core area to the supporting services area, historic residential areas, principal open spaces and the riverine areas.

Contiguous Expansion of the Retail Core Area in a Southerly Direction

Proposed Amendment No. 1 to the Mudgee Local Environmental Plan clearly indicates that the preferred direction for the expansion of the Mudgee CBD is in a southerly direction. Given the current location and configuration of the retail core area, this principle can be given greater specificity as follows:-

- expansion of the retail core area should be directed in an axis along Church Street and consider as a first priority potential properties within approximately 150 metres or about two minutes walking time of the intersection of Mortimer and Church Streets (refer Figure 8);
- potential new development sites should where possible utilise existing significant single ownership sites;

- new retail-based developments should utilise where possible existing car parking resources and/or be integrated with existing car parking resources;

- new retail-based developments should contain their own parking requirements in off-street on-grade and landscaped car parking;

- the extension of the retail core area in a southward direction must ensure an active and contiguous retail/commercial frontage along Church and Mortimer Streets relevant to the development site under consideration;

- any retail-based development must be strongly integrated with an active retail commercial frontage along Church and Mortimer Streets

Conservation and Amenity Protection of the Residential Areas

The Mudgee Town Centre retains extensive and attractive historic residential areas. Provision for new retail and commercial development must so far as reasonably possible:-

- minimise any loss of housing;

- minimise traffic impacts in residential local streets;

- minimise visual and other amenity effects arising from retail/commercial developments and from the development of car parking areas which may be required to service these developments;

Protection of Riverine and Open Space Areas

The setting of the Town Centre is enhanced by the Town's parks, gardens and riverine areas. Any retail/commercial development of the CBD must (inter alia) be directed to ensuring the protection in perpetuity of these resources.

Consolidation of the Town Centre's Car Parking System

The Mudgee CBD has and extensive on-street car parking system and an important centre-of-block off-street car parking system. New retail/commercial developments which adjoin the retail core area should provide car parking in a form compatible with the existing system, and which add value to the existing system. Where possible, access and egress continuity should be sought for the major off-street car parks to further develop the existing car parking areas as part of an integrated circulation system.

8. Car Parking Assessment

As part of the Mudgee Retail Study, a car parking assessment of the Town Centre was undertaken. A supply and car parking utilisation survey was undertaken on Friday, 3 December 1999. The results of the survey are indicated in Table J.1. It can be seen that:-

- total car parking supply for spaces accessible to the general public is some **1,341** spaces in the retail and commercial areas of the Town Centre;
- of this number, some **1,156** car spaces are located in the retail core area and supporting services area (refer Figures 7, 5);
- the peak utilisation of publicly accessible car spaces in the retail and commercial areas of the Town Centre averaged approximately 67%; and in the retail core area and supporting services area it averaged 71%;
- the peak car parking demand attributable to shopping floorspace in the retail core area was assessed at **3.35 car spaces per 100m^2 gross floor area of shop floorspace** (specifically occupied retail goods floorspace);
- it will be noted that the Mortimer Street car park site is unmade and unlevelled vacant land. It was not subject to discernible usage at the time of the survey and did not contribute to car parking supply or the alleviation of car parking demands. That is, the withdrawal of this site from the car parking system has no direct impacts on existing demand and supply of car parking in the CBD (although it is recognised that additional car parking demands may be generated as a consequence of a future development on this site and these will need to be assessed and accommodated).

In summary, the car parking assessment and analyses show that:-

- for the CBD as a whole there is a reasonable balance between car parking demand and supply (that it as this scale of analysis no additional publicly accessible car parking spaces would be required at the present time assuming no further population growth and no further retail or commercial development);
- for the retail core area peak car parking demands are marginally in excess of publicly available car parking supply. With additional population growth, further car parking supply will be required in the retail core area;
- for any new retail development and/or commercial development in the retail core area or adjoining the retail core area, car parking should be provided at a rate close to the currently observed peak parking demands per 100m^2 of gross floor area.

The requirement of Council's car parking code of 1 car space per 30m^2 gross floor area of shop is extremely close to the observed peak car parking demand of 3.35 car spaces per 100m^2 gross floor area of occupied retail goods floorspace. The additional car parking required for the development should be so far as possible be provided in a single integrated car park.

Where a development will provide a shop or commercial frontage to streets with on-street car parking (eg. Church or Mortimer Streets) then there may be some justification in discounting total car parking requirements by the available quantum of on-street car parking bordering the subject development.

9. Evaluation of Mortimer Street Car Park Site for Future Retail Development

As part of the brief of the Mudgee Retail Study, an evaluation was required of the strategic suitability of the Mortimer Street car park site for a future retail development. The assessment of the subject site was undertaken consistent with:-

- the strategic principles and guidelines for the Mudgee CBD set out in Section 7;
- the car parking assessment of the Mudgee CBD set out in Section 8;

In the light of the strategic and car parking assessments the following observations and principles have been set out for the subject site:

- the subject site is zoned 3(a) in Council's LEP. It is a significant site in so far as it represents a large single ownership site capable of development;
- the subject site is in part within approximately 150 metres of the intersection of Mortimer and Church Streets. It is located in the most preferable identified future development area which immediately adjoins the established retail core area of the Mudgee CBD;
- as indicated in Section 8, the Mortimer Street car park site does not at present effectively contribute to either car parking supply or to any discernible measure alleviate car parking demands. The withdrawal of this site from the public car parking system for a future retail development thus requires no special additional car parking supply to be provided as an immediate consequence.

  However, as indicated in the car parking assessment (refer Section 8), there is at present a broad balance between peak car parking demands and car parking supply in the publicly accessible car parking system. There is not sufficient capacity in the existing system to provide for significant quanta of additional car parking generated by new developments (that is, car parking requirements for new developments cannot be discounted to any significant extent by the existing supply. Conditions where some degree of discounting of total car parking requirements may apply are indicated below).

  In the case of the subject site, any new development on the subject site will require additional car parking to be provided on site. There may be a basis to discount total car parking requirements if there is a comprehensively planned development extending through to either Church and/or Mortimer Streets (in this case the discounted car parking spaces would be equal to the available on-street car parking directly abutting the development site).

- the subject site is connected to Mortimer, Church and Gladstone Streets by lanes and rights of way. In the judgement of the Consultants, the subject site should be required to be linked to adjoining sites (in whole or in part) fronting Mortimer and Church Streets;

- any development for the subject site should thus be linked to an integrated retail/commercial development with an active frontage along relevant sections of Church and Mortimer and Streets (refer Figure 8);

- in this context, the subject site should be viewed as an important contributory site for a future potential retail development in the CBD which if linked with active development frontages to relevant sections of Mortimer and Church Streets will make an important contribution to ensuring the optimal integration of new retail development with the existing established retail core area of the Mudgee CBD. It is thus a foundational site for the extension of the retail core area, but will require further consolidation and/or co-operative development to achieve optimal physical integration with the established retail core area (refer Figure 8);

- the subject site is approximately 5,921m^2 in extent. As such, it could only cater for a (for example) free standing supermarket with ancillary car parking. As indicated above, it is not desirable for the subject site to be considered in the context of a free standing development. This would not provide optimal economic and community benefits for the Mudgee CBD and the Mudgee community.

In conclusion, it is recommended that the Mortimer Street car park site be considered as an important foundational site for a potential future retail/commercial development. It is further recommended that a Development Control Plan be prepared for an area encompassing the subject site and adjoining sites along Church and Mortimer Streets. It is recommended that the Development Control Plan be directed to achieve the following:-

- development of active and integrated shopping and retail services frontages along relevant sections of Mortimer and Church Streets;

- provision for an anchor store or stores (eg. a new supermarket or small discount department store);

- provision for a landscaped on-grade car park at the rear of this development, with planned pedestrian pathways from the car park to the retail development;

- provision for accessways to the car parking area from Mortimer, Church and Gladstone Streets;

- provision for landscaped buffers along the southern and eastern edges of the car parking area to protect the existing residential area;

- provision for safe pedestrian access across Church and Mortimer Streets providing direct linkage to adjoining commercial areas and to the established retail core area (the pedestrian access locations should form part of a wider pedestrian network system for the CBD).

10. Conclusions

The Mudgee Retail Study has drawn a number of important conclusions and several recommendations. These relate to:-

- regional role of Mudgee CBD;
- long term residential growth;
- additional demands for retail floorspace;
- recommended allocation of retail floorspace requirements for Mudgee Shire (1999-2011);
- locational principles for new retail-based development;
- principles for the Mortimer Street car park site.

Regional Role of Mudgee CBD

The Mudgee CBD provides an important retailing and services role for an area which extends beyond the Shire boundaries up to 75 kilometres from Mudgee. The regional catchment area (RCA) of Mudgee includes the localities of Dunedoo, Coolah, Cassilis and Merriwa in the north and Rylstone and Kandos in the south (refer Figure 3).

The key precinct which contains the largest single concentration of regional retailing and service functions is the retail core area of the Mudgee CBD (refer Figures 4, 7). As the Shire and surrounding districts continue to grow, there will be further demands for additional retail goods floorspace and a range of diversified commercial and professional services.

Council's LEP provides principles for the consolidation of retail and commercial activity in the CBD. In order to meet the growth requirements of the regional catchment area, this study, consistent with Council's LEP, provides strategic principles for the future extension of the retail core area to provide for new regional level retail and commercial facilities in the CBD.

Long Term Residential Growth

The Mudgee Shire has undergone significant residential and population growth over the past 30 years. Residential development and household and population forecasts undertaken for the study indicate that the current residential population, estimated at approximately 18,430 persons (year ended 30 June 1999), is forecast to grow to approximately 21,650 persons by 2011 and 24,360 persons by the year 2021.

Household growth is considered to be a more accurate measure of likely retail and services requirements (rather than population growth). Households are forecast to increase by approximately 25% between 1999 and 2011 and a further 18% between 2011 and 2021.

In summary, the analysis and forecasts show that long term sustained residential household and population growth for the Shire is likely over the period 1999-2021. This in turn provides a clearly defined basis for additional demands for retail and commercial services floorspace in the foreseeable future.

Additional Demands for Retail Floorspace

The study has found that there are likely to be requirements for a further 24,710m^2 gross leasable area of net additional retail goods and services floorspace to meet the needs of the Shire and regional catchment area over the period 1999-2021.

In the immediate period (1999-2006) net additional retail floorspace requirements for the Shire and regional catchment area are approximately 8,550m^2 gross leasable area (refer Table A). Of this quantum, the following requirements have been assessed:-

- for **food, groceries and liquor store facilities**: net additional retail floorspace requirements are approximately 3,080m^2 gross leasable area (gla);
- for **non-food retail goods outlets**: net additional retail goods floorspace requirements are approximately 2,980m^2 gla;
- for **retail services** net additional floorspace requirements are approximately 1,640m^2 gla;
- in addition, an allowance for vacant floorspace requires a further 850m^2 gla to be added to the system.

In each of the five year periods following 2006 to 2021, in excess of 5,000m^2 gla will be required as net additional retail floorspace for the Shire.

Recommended Allocation of Retail Floorspace Requirements for Mudgee Shire: 1999 - 2011

In order to maximise community and economic benefit it is recommended that:-

- there be sufficient flexibility in the allocations to allow for new major store types to develop in Mudgee subject to market interest. In the context of foreseeable requirements for Mudgee Shire, major store types for which there is a need and where market interest may be likely or possible include:

- a standard sized supermarket of approximately **3,000m^2 gla** (out of the 4,250m2 gla available for supermarkets and related stores net additional floorspace required for the Shire over the period 1999-2011);

- a small/medium-sized discount department store of approximately **3,500-4,500m2 gla** (out of the 5,400m2 gla available for non-food retail goods stores net additional floorspace required for the Shire over the period 1999-2011);

- provision be made for the major store types to be developed in the Mudgee CBD subject to locational and development principles recommended in Section 7. This in turn will necessitate most of the floorspace requirements over the next decade to be developed in the Mudgee CBD.

The development of policy and supportive actions to ensure preference is directed to a development of new major store types is designed to maximise community benefit from the floorspace allocations, and within this context to maximise the viability and regional performance role of the Mudgee CBD.

Locational Principles for New Retail-based Development

It is recommended that the following locational and development principles form the basis for the realisation of CBD consolidation policies set out in Council's LEP (as amended, 1998). These are:-

- further improvements to the car parking resources, urban design and pedestrian amenity of the retail core area;
- contiguous expansion of the retail core area in a southerly direction with priority for sites most proximate to Mortimer Street (refer Section 7.3, Figure 8);
- conservation and amenity protection of historic residential areas of Mudgee which are located within and adjoin the Mudgee CBD;
- protection of riverine and open space areas;
- consolidation and inter-linking of the Town Centre's car parking system.

Principles for the Mortimer Street Car Park Site

The Mortimer Street car park site does not at present contribute to any measurable extent either to car parking supply or to the amelioration of car parking demands in the Town Centre. It is well placed strategically to form an important contributory site for the further expansion of future major retail and commercial development in the Mudgee CBD, subject to the following planning and development principles:-

- for the purposes of a new major retail development, the Mortimer Street car park site should be considered as part of a development precinct extending northward from the subject site to Mortimer Street and westward to Church Street (refer Figure 8);

- any development for the subject site should thus be linked to an integrated retail/commercial development with an active frontage along relevant sections of Church and Mortimer Streets (refer Figure 8);

- it is recommended that a Development Control Plan (DCP) be prepared for the development precinct as defined above. It is further recommended that the Development Control Plan be directed to achieve the following:-

  - development of active and integrated shopping and retail services frontages along relevant sections of Mortimer and Church Streets;

  - provision for an anchor store or stores (eg. a new supermarket or small discount department store);

  - provision for a landscaped on-grade car park at the rear of this development, with planned pedestrian pathways from the car park to the retail development;

  - provision for accessways to the car parking area from Mortimer, Church and Gladstone Streets;

  - provision for landscaped buffers along the southern and eastern edges of the car parking area to protect the existing residential area;

  - provision for safe pedestrian access across Church and Mortimer Streets providing direct linkage to adjoining commercial areas and to the established retail core area (the pedestrian access locations should form part of a wider pedestrian network system for the CBD).

LIST OF TABLES

Table A Shire of Mudgee : Retail Floorspace Requirements (1999-2021)

Table Set B Shire of Mudgee : Residential Development, Household and Population Statistics and Forecasts (1971-2021)

Table C Rates of Provision of Retail Floorspace Requirements

Table D Shire of Mudgee : Existing Retail Floorspace (December 1999)

Table Set E Mudgee Town Centre Shopper Survey (December 1999)

Table Set F Escape Expenditure Estimates by Mudgee Shire Residents (1993,99)

Table Set G Comparative Retail Performance of Mudgee with other Cities and Towns in Regional New South Wales (1991/92 Retail Census)

Table Set H Household Expenditure Survey by Household Income Group Australia (1993-1994)

Table Set J Mudgee CBD : Assessment of Car Parking Supply and Utlisation (December 1999)

TABLE A

Shire of Mudgee : Retail Floorspace Requirements (1999-2021)

TABLE A
MUDGEE SHIRE: ASSESSMENT OF RETAIL FLOORSPACE REQUIREMENTS (1999 - 2021)*

Job No. 4464

PERIOD	FOOD AND GROCERIES FLOORSPACE (GLA m2)		NON - FOOD RETAIL GOODS FLOORSPACE (GLA m2)		RETAIL SERVICES FLOORSPACE (GLA m2)		VACANT FLOORSPACE FLOORSPACE (GLA m2)		TOTAL: RETAIL GOODS AND SERVICES FLOORSPACE (GLA m2)	
	(Cumulative) Total Floorspace Requirements at the End of the Period	Net Additional Requirements During Period	(Cumulative) Total Floorspace Requirements at the End of the Period	Net Additional Requirements During Period	(Cumulative) Total Floorspace Requirements at the End of the Period	Net Additional Requirements During Period	(Cumulative) Total Floorspace Requirements at the End of the Period	Net Additional Requirements During Period	(Cumulative) Total Floorspace Requirements at the End of the Period	Net Additional Requirements During Period
Existing at (December 1999)	9,460	N.App	22,940	N.App	12,580	N.App	1,350	N.App	46,330	N.App
1999 - 2006	12,540	3,080	25,920	2,980	14,220	1,640	2,200	850	54,880	8,550
2006 - 2011	13,710	1,170	28,340	2,420	15,540	1,320	2,400	200	59,990	5,110
2011 - 2016	14,930	1,220	30,860	2,520	16,930	1,390	2,610	210	65,330	5,340
2016 - 2021	16,240	1,310	33,560	2,700	18,400	1,470	2,840	230	71,040	5,710
1999 - 2021	16,240	6,780	33,560	10,620	18,400	5,820	2,840	1,490	71,040	24,710

*All current statistics and forecasts have been rounded to the nearest ten units.
**Vacant floorspace is approximately 2.9% of retail, commercial and manufacturing floorspace in Shire (refer Table D).
The forecasts provide an allowance for 4% vacant floorspace which is an industry standard rate of provision.

TABLE SET B

Shire of Mudgee : Residential Development, Household and Population Statistics and Forecasts (1971-2021)

TABLE B1
MUDGEE SHIRE:
FORECAST RESIDENT POPULATION (1996 - 2021)
Ratio Consultants (February 2000)

Year Ended 30th June	LOCALITY			TOTAL SHIRE
	MUDGEE TOWNSHIP	GULGONG TOWNSHIP	RURAL LOCALITIES	
1996	8,470	2,090	7,100	**17,660**
1997	8,760	2,090	7,170	**18,020**
1998	8,890	2,110	7,220	**18,220**
1999	9,030	2,130	7,270	**18,430**
2000	9,150	2,140	7,370	**18,660**
2001	9,290	2,160	7,480	**18,930**
2002	9,460	2,180	7,550	**19,190**
2003	9,630	2,190	7,650	**19,470**
2004	9,820	2,210	7,720	**19,750**
2005	9,980	2,220	7,820	**20,020**
2006	10,170	2,240	7,890	**20,300**
2007	10,330	2,250	7,980	**20,560**
2008	10,510	2,240	8,050	**20,800**
2009	10,670	2,260	8,150	**21,080**
2010	10,850	2,270	8,240	**21,360**
2011	11,000	2,290	8,360	**21,650**
2012	11,170	2,300	8,450	**21,920**
2013	11,350	2,310	8,540	**22,200**
2014	11,490	2,330	8,650	**22,470**
2015	11,660	2,340	8,740	**22,740**
2016	11,800	2,360	8,820	**22,980**
2017	11,990	2,370	8,930	**23,290**
2018	12,160	2,380	9,020	**23,560**
2019	12,340	2,370	9,100	**23,810**
2020	12,500	2,380	9,210	**24,090**
2021	12,680	2,390	9,290	**24,360**

***Current statistics and forecasts have been rounded to the nearest ten.**

TABLE B2
MUDGEE SHIRE:
FORECAST RESIDENT HOUSEHOLDS (1996 - 2021)
Ratio Consultants (February 2000)

Year Ended 30th June	LOCALITY*			TOTAL SHIRE
	MUDGEE TOWNSHIP	GULGONG TOWNSHIP	RURAL LOCALITIES	
1996	3,130	760	2,490	**6,380**
1997	3,180	760	2,520	**6,460**
1998	3,240	770	2,550	**6,560**
1999	3,310	780	2,580	**6,670**
2000	3,370	790	2,630	**6,790**
2001	3,440	800	2,680	**6,920**
2002	3,520	810	2,720	**7,050**
2003	3,600	820	2,770	**7,190**
2004	3,690	830	2,810	**7,330**
2005	3,770	840	2,860	**7,470**
2006	3,860	850	2,900	**7,610**
2007	3,940	860	2,950	**7,750**
2008	4,030	860	2,990	**7,880**
2009	4,110	870	3,040	**8,020**
2010	4,200	880	3,090	**8,170**
2011	4,280	890	3,150	**8,320**
2012	4,370	900	3,200	**8,470**
2013	4,460	910	3,250	**8,620**
2014	4,540	920	3,310	**8,770**
2015	4,630	930	3,360	**8,920**
2016	4,710	940	3,410	**9,060**
2017	4,810	950	3,470	**9,230**
2018	4,900	960	3,520	**9,380**
2019	5,000	960	3,570	**9,530**
2020	5,090	970	3,630	**9,690**
2021	5,190	980	3,680	**9,850**

***Current statistics and forecasts have been rounded to the nearest ten.**

TABLE B3
MUDGEE SHIRE:
FORECAST TOTAL DWELLING STOCK (1996 - 2021)
Ratio Consultants (February 2000)

Year Ended 30th June	LOCALITY*			TOTAL SHIRE
	MUDGEE TOWNSHIP	GULGONG TOWNSHIP	RURAL LOCALITIES	
1996	3,290	830	3,270	7,390
1997	3,350	840	3,310	7,500
1998	3,410	850	3,350	7,610
1999	3,480	860	3,400	7,740
2000	3,550	870	3,460	7,880
2001	3,620	880	3,520	8,020
2002	3,700	890	3,580	8,170
2003	3,790	900	3,640	8,330
2004	3,880	910	3,700	8,490
2005	3,970	920	3,760	8,650
2006	4,060	930	3,820	8,810
2007	4,150	940	3,880	8,970
2008	4,240	950	3,940	9,130
2009	4,330	960	4,000	9,290
2010	4,420	970	4,070	9,460
2011	4,510	980	4,140	9,630
2012	4,600	990	4,210	9,800
2013	4,690	1,000	4,280	9,970
2014	4,780	1,010	4,350	10,140
2015	4,870	1,020	4,420	10,310
2016	4,960	1,030	4,490	10,480
2017	5,060	1,040	4,560	10,660
2018	5,160	1,050	4,630	10,840
2019	5,260	1,060	4,700	11,020
2020	5,360	1,070	4,770	11,200
2021	5,460	1,080	4,840	11,380

***Current statistics and forecasts have been rounded to the nearest ten.**

TABLE B4
MUDGEE SHIRE:
FORECAST ALLOCATION OF NETT ADDITIONAL HOUSING STOCK BY LOCALITY AND YEAR (1996 - 2021)
Ratio Consultants (February 2000)

Year Ended 30th June	LOCALITY*			TOTAL SHIRE
	MUDGEE TOWNSHIP	GULGONG TOWNSHIP	RURAL LOCALITIES	
1997	60	10	40	110
1998	60	10	40	110
1999	70	10	50	130
2000	70	10	60	140
2001	70	10	60	140
2002	80	10	60	150
2003	90	10	60	160
2004	90	10	60	160
2005	90	10	60	160
2006	90	10	60	160
2007	90	10	60	160
2008	90	10	60	160
2009	90	10	60	160
2010	90	10	70	170
2011	90	10	70	170
2012	90	10	70	170
2013	90	10	70	170
2014	90	10	70	170
2015	90	10	70	170
2016	90	10	70	170
2017	100	10	70	180
2018	100	10	70	180
2019	100	10	70	180
2020	100	10	70	180
2021	100	10	70	180

***Current statistics and forecasts have been rounded to the nearest ten.**

TABLE B5
MUDGEE SHIRE:
FORECAST YIELD RATE (PERSONS PER OCCUPIED PRIVATE DWELLING) (1996 - 2021)
Ratio Consultants (February 2000)

Year Ended 30th June	LOCALITY			TOTAL SHIRE
	MUDGEE TOWNSHIP	GULGONG TOWNSHIP	RURAL LOCALITIES	
1996	2.77	2.77	2.86	**2.80**
1997	2.76	2.76	2.85	**2.79**
1998	2.74	2.74	2.83	**2.77**
1999	2.73	2.73	2.82	**2.76**
2000	2.72	2.72	2.80	**2.74**
2001	2.70	2.70	2.79	**2.73**
2002	2.69	2.69	2.78	**2.72**
2003	2.67	2.67	2.76	**2.70**
2004	2.66	2.66	2.75	**2.69**
2005	2.65	2.65	2.73	**2.68**
2006	2.63	2.63	2.72	**2.66**
2007	2.62	2.62	2.71	**2.65**
2008	2.61	2.61	2.69	**2.64**
2009	2.60	2.60	2.68	**2.62**
2010	2.58	2.58	2.67	**2.61**
2011	2.57	2.57	2.65	**2.60**
2012	2.56	2.56	2.64	**2.58**
2013	2.54	2.54	2.63	**2.57**
2014	2.53	2.53	2.61	**2.56**
2015	2.52	2.52	2.60	**2.55**
2016	2.51	2.51	2.59	**2.53**
2017	2.49	2.49	2.57	**2.52**
2018	2.48	2.48	2.56	**2.51**
2019	2.47	2.47	2.55	**2.50**
2020	2.46	2.46	2.54	**2.48**
2021	2.44	2.44	2.52	**2.47**

TABLE B6
MUDGEE SHIRE
CURRENT AND FORECAST HOUSING STOCK (1996 - 2001)
Forecasts by Ratio Consultants Pty Ltd based on Mudgee Shire Council Dwelling Approval Trends and ABS Census Statistics.

5 Year Period	Year Ended 30th June	Net Additional Housing Stock* Per 5 Year Period	Net Additional Housing Stock* Per Annum	Total Housing Stock* No. of Units
1996 - 2001	1997	630	110	7,490
	1998		110	7,600
	1999		130	7,730
	2000		140	7,870
	2001		140	8,010
2001 - 2006	2002	790	150	8,160
	2003		160	8,320
	2004		160	8,480
	2005		160	8,640
	2006		160	8,800
2006 - 2011	2007	820	160	8,960
	2008		160	9,120
	2009		160	9,280
	2010		170	9,450
	2011		170	9,620
2011 - 2016	2012	850	170	9,790
	2013		170	9,960
	2014		170	10,130
	2015		170	10,300
	2016		170	10,470
2016 - 2021	2017	900	180	10,650
	2018		180	10,830
	2019		180	11,010
	2020		180	11,190
	2021		180	11,370

***Current statistics and forecasts have been rounded to the nearest ten units.**

TABLE B7
MUDGEE SHIRE
Nett Changes in Total Dwelling Stock
(1971 - 96)

Period	Nett Increase in Total Dwelling Stock No. of Units	Nett Increase Per Annum No. of Units
1971 - 76	418	83.6
1976 - 81	1,677	335.5
1981 - 86	309	61.8
1986 - 91	964	192.8
1991 - 96	458	91.6
1971 - 86	2,404	160.3
1986 - 96	1,422	142.2
1971 - 96	3,826	153.0

TABLE B8
MUDGEE RETAIL STUDY
MUDGEE SHIRE: DWELLING STOCK AND TRENDS BY LOCALITY (1971 - 1996)

LOCALITY	DWELLING STOCK NET INCREASE PER ANNUM*				PERCENTAGE DISTRIBUTION OF DWELLING STOCK NETT INCREASE*			
	1971 - 1986 No.	1986 - 1996 No.	1971 - 1996 No.	1996 - 1999** No.	1971 - 1986 %	1986 - 1996 %	1971 - 1996 %	1996 - 1999** %
MUDGEE TOWNSHIP	47.3	76.8	59.1	57.2	29.5	54.0	38.6	53.5
GULGONG TOWNSHIP	16.0	10.5	13.8	8.0	10.0	7.4	9.0	7.5
RURAL LOCALITIES	97.0	54.9	80.1	41.8	60.5	38.6	52.4	39.0
TOTAL MUDGEE SHIRE	160.3	142.2	153.0	107.0	100.0	100.0	100.0	100.0

*** Calculated from changes in total dwelling stock at previous censuses (1971 - 96).**
**** Dwelling Unit Approvals (Mudgee Shire Council)**

TABLE B9
MUDGEE SHIRE
Dwelling Unit, Construction and Approval Trends
(1986 - 2005)

Triennial Period	Financial Year Ending 30th June	No. of Dwellings Constructed and Approved	
		Per Annum	Average Per Triennium
Historic Trends			
1986 - 87*	1986	115	113.5**
	1987	112	
	1988	143	
1998 - 90	1989	157	158.7
	1990	176	
	1991	202	
1991 - 93	1992	104	143.7
	1993	125	
	1994	91	
1994 - 96	1995	95	89.7
	1996	83	
	1997	105	
1997 - 99	1998	112	115.0
	1999	128	
Forecast Trends			
	2000	135	
2000 - 02	2001	142	142.0
	2002	149	
	2003	156	
2003 - 05	2004	160	158.7
	2005	160	

*** 2 year period**
**** 2 year average**

TABLE B10
MUDGEE SHIRE POPULATION PROJECTIONS:
A COMPARISON OF POPULATION FORECASTS
(Department of Planning 1994, Hoynes Wheeler and Thorne Pty Ltd 1995,
Ratio Consultants, February 2000)

Job No. 4464.

Year	Mudgee Shire Resident Forecast Population (1996 - 2021) No. Persons			
	Department of Planning (1994)		Ratio Consultants February 2000	Hoynes Wheeler and Thorne Pty Ltd Low Projection
	Medium Projection	High Projection		
1996	17,570	17,570	17,660	18,170
2001	18,380	18,600	18,930	19,800
2006	19,000	19,930	20,300	21,830
2011	19,500	20,190	21,650	23,590
2016	19,920	21,000	22,980	25,870
2021	20,300	21,800	24,360	28,080

TABLE C

Rates of Provision of Retail Floorspace Requirements

TABLE C
MDUGEE SHIRE: COMPARATIVE ASSESSMENT OF ACTUAL RATES OF RETAIL GOODS AND SERVICES FLOORSPACE PROVISION (1991/92 - 1999)

MAJOR RETAIL CATEGORY	METROPOLITAN SYDNEY (Retail Census, 1991/92)	COUNTRY AND REGIONAL NSW (Retail Census, 1991/92)	BATHURST CITY AND REGIONAL CATCHMENT AREA (1997/98)	MUDGEE SHIRE (December 1999)		MUDGEE SHIRE: PROPOSED RATES OF PROVISION FOR RETAIL GOODS AND SERVICES FLOORSPACE REQUIREMENTS (1999 - 2021)***
				A*	B**	
	Floorspace Provision. m2 Gross Leaseable Area / Resident Household					
FOOD, GROCERIES AND LIQUOR	1.44	1.53	1.20	1.28	1.28	1.50
NON - FOOD RETAIL GOODS	3.10	2.92	2.40	3.10	3.53	3.10
TOTAL RETAIL GOODS	4.55	4.45	3.60	4.38	4.81	4.60
RETAIL SERVICES	Not Available	Not Available	1.63	1.70	1.93	1.70

*Takes account of estimated households resident in Shire at December 1999 (6,730) and inbound expenditure from beyond the Shire (estimated at 9% of sales), but does not take account of escape expenditures by household residents in the Shire.
**Takes account of the above factors (*) together with an allowance of escape expenditures for households resident in the Shire (estimated at approximately 22% of non-food expenditures by resident households).
***Assessed on the basis of current patterns of in bound expenditures remaining constant and long-term reduction in escape expenditures to approximately 10% of total non-food expenditures by resident households.

TABLE D

Shire of Mudgee : Existing Retail Floorspace (December 1999)

TABLE D
MUDGEE SHIRE, NEW SOUTH WALES.
EXISTING RETAIL AND COMMERCIAL FLOORSPACE
December 1999.
Source: Mudgee Shire Council

MAJOR ACTIVITY TYPE	LOCALITY				TOTAL SHIRE
	MUDGEE CENTRAL BUSINESS DISTRICT GLA (m2)*	SOUTH MUDGEE GLA (m2)	GULGONG GLA (m2)	MUDGEE OTHER GLA (m2)	GLA (m2)
FOOD, GROCERIES AND LIQUOR STORES					
Supermarket and Grocery Stores	4,088	85	582	0	4,755
Specialty Food and Liquor Stores	2,997	170	966	831	4,964
Sub Total: Food, Groceries and Liquor Stores	**7,085**	**255**	**1,548**	**831**	**9,719**
NON FOOD RETAIL GOODS STORES					
Department and General Stores	6,585		1,744	0	8,329
Clothing and Soft Goods Retailing	1,547		160	0	1,707
Furniture, Household and Appliance Retailing	4,247	895	90	4,375	9,607
Recreational Goods Retailing	660		80	0	740
Other Personal and Household Goods Retailing	1,842		474	1,140	3,456
Sub Total: Non Food Retail Goods Stores	**14,881**	**895**	**2,548**	**5,515**	**23,839**
RETAIL AND PROFESSIONAL SERVICES					
Household Equipment Repair Services	348		0	0	348
Selected Personal Services	2,941	170	813	471	4,395
Professional Services	2,280	170	286	0	2,736
Banks	1,763		492	0	2,255
Pubs, Taverns and Bars	1,983		877	323	3,183
Sub Total: Retail	**9,315**	**340**	**2,468**	**794**	**12,917**
GENERAL COMMERCIAL AND MANUFACTURING					
General Commercial	13,742		5,097	12,667	31,506
Automotive	2,987		1,417	4,021	8,425
Automotive Fuel Retailing	286		201	1,713	2,200
Recreation Services	3,465		401	2,109	5,975
Accomodation Services	883		2,447	3,800	7,130
Manufacturing	3,230		1,529	0	4,759
Caravan Sales, Building and Farm Supplies Sales	0		237	4,423	4,660
Sub Total: General Commercial and Manufacturing	**24,593**		**11,329**	**28,733**	**64,655**
TOTAL OCCUPIED RETAIL, COMMERCIAL AND MANUFACTURING FLOOR SPACE	**33,908**	**1,490**	**13,797**	**29,527**	**77,572**
Vacant	1,841		803	656	3,300
TOTAL RETAIL, COMMERCIAL AND MANUFACTURING FLOOR SPACE	**57,715**	**1,490**	**18,696**	**36,529**	**114,430**

Table Set E

Mudgee Town Centre Shopper Survey (December 1999)

TABLE SET E
Results of Mudgee Town Centre Visitor Survey

No. of respondents	307

Sex of respondents:

Male	43.0%
Female	57.0%

Q. 1: Location of residence

Reside in	% of respondents
Mudgee (Central/ East)	38.8
Mudgee South	13.9
Mudgee West	9.4
Bombira/ Putta Bucca	3.4
Gulgong	10.3
Cooks Gap	4.9
Frog Rock	1.0
Cooyal	0.7
Grattai	1.3
Wollar	1.3
Appletree Flat	0.3
Windeyer	0.3
Cumbo	0.7
Spring Flat	0.3
Cudgegong	0.7
Hargraves	1.0
Birriwa	0.3
Kaludabah	0.3
Merriwa	1.0
Ulan	0.3
Yarrawonga	0.3
Green Gully	0.3
Campbell's Creek	0.3
Avisford	0.3
Eurundere	0.7
Rylstone/ Kandos	1.6
Dunedoo	1.6
Coolah	0.3
Harwood	0.3
Cassilis	0.3
Condoblin	0.3
Bundaberg	0.7
Callenbone	0.3
Other	2.5
Total	**100.2**

Q. 2: Mode of Travel

Mode of Travel	% of Respondents

Car as Driver	58.4
Car as Passenger	9.8
Taxi	2.6
Bus	1.6
Bicycle	1.0
Walk	25.7
Other	1.0
Total	**100.0**

Q.3: Length of stay

Length of stay intended in the CBD	% of Respondents
Less than 1 hour	18.9
1-2 Hours	27.4
2-3 Hours	16.3
3-4 Hours	7.8
More than 4 Hours	29.6
Total	**100.0**

Q. 4: Frequency of visits

Frequency	% of Respondents
Daily/ Several Times	62.5
Approximately weekly	27.4
Fortnightly	5.9
Monthly	2.3
Hardly ever	2.0
Total	**100.0**

Q. 5: Activities undertaken in the CBD

Activities	% of Respondents *
Shopping	77.5
Work	30.3
Personal Services	26.4
Recreation, leisure, entertainment, etc.	25.1
Medical, professional services, education	18.2
Other	12.7

* - This was a multiple activity choice question. Each response has been separately analysed.
Responses will therefore exceed 100% of respondents.

Q. 6: Stores or facilities visited

Stores/facilities	% of respondents *
Woolworths	75.6

Bank	41.0
Newsagent	37.8
Post Office	30.9
Bi Lo	24.1
Fosseys	23.5
Chemist	22.8
Hardware	18.6
Library	16.0
Kellet's	15.3
Furniture/ Electrical	12.4
Greengrocers	12.1
Other	36.5

* - This was a multiple activity choice question. Each response has been separately analysed.
Responses will therefore exceed 100% of respondents.

Q. 8: New stores/ services required

New stores/ services	% of Respondents
New supermarket	33.9
New shopping centre/ department store	22.5
Discount department store	19.2
More Pubs/ nightclubs	2.6
Coffee shops/ restaurants	2.3
Clothing stores	1.0
No new stores necessary	18.6
Total	**100.0**

Q.9: Other Improvements to the CBD

Other Improvements	% of Respondents
Under cover/ improved parking	20.5
Better roads	9.8
More restrooms/ baby change etc.	8.8
Seating around CBD	6.5
Bins/ recycling etc.	5.9
Shade/ more trees	3.6
More lighting	2.6
Remove trees	1.3
Pay phones	1.0
No new improvements	40.1
Total	**100.0**

Q. 10: Locations where household appliances, furniture and furnishings have been purchased in the past 12 months

Stores/ locations	% of Respondents *
Mudgee	93.3

Dubbo	4.6
Other	2.1
Total	**100.0**

*** -** excludes those who did not purchase any goods

Q. 11: Locations where footwear and clothing have been purchased in the past 12 months

Stores/ locations	% of Respondents *
Mudgee	87.6
Dubbo	6.0
Sydney	4.7
Other Cities/ Towns	1.7
Total	**100.0**

* - excludes those who did not purchase any goods

Q. 12: Age groups of respondents

Age groups	% of respondents
Under 18	9.1
19-29	19.2
30-39	16.6
40-59	34.5
60+	20.5
Total	**100.0**

Q. 13: Cities/ towns visited in the past 12 months

Cities/ towns	Proportion of respondents who have visited cities and towns outside Mudgee in the past 12 months	Primary purpose of visit (% of respondents who visited)						
		Shopping	Social	Sporting	Medical	Professional Services	Other *	Total
Bathurst	76.2	36.9	16.3	14.9	13.5	8.5	9.9	100.0
Dubbo	69.4	71.9	13.4	1.7	6.5	2.7	3.8	100.0
Orange	66.5	76.6	5.8	3.7	5.8	4.4	3.3	100.0
Western Sydney (Parramatta/ Penrith)	41.4	15.3	15.3	5.5	16.6	5.5	13.9	100.0
Other Sydney	51.8	26.3	52.5	2.2	10.2	5.8	3.7	100.0
Other Cities/ towns	27.4	8.6	68.6	4.3	2.9	2.9	12.9	100.0

* - includes any two purposes other than shopping

Table Set F

Escape Expenditure Estimates by Mudgee Shire Residents
(1993,99)

TABLE F1
CALCULATION OF ESCAPE EXPENDITURES BY MUDGEE SHIRE RESIDENTS (Source "Mudgee Retail Outshopping Study", Metra Pty Ltd, June 1993).

Job No. 4464

COMMODITY GROUP / SERVICE	Proportion of Survey Sample who made some purchases outside Mudgee* %	(For those who purchased outside Mudgee) Mean percentage of purchases made outside Mudgee* %	Average Escape Expenditure** %
Adult Clothing	82.3	35.0	25.8
Children's Clothing	82.6	37.0	30.6
Adult Shoes	62.7	39.0	24.5
Children's Shoes	67.0	39.0	26.1
Jewellery	52.9	55.0	29.1
Electrical Goods	42.9	44.5	19.1
White Goods	28.0	47.0	13.2
Furniture and Furnishings	62.6	54.7	34.2
Building and Garden Supplies	20.4	24.0	4.9
Leisure and Sporting Products	46.1	37.6	17.3
Professional Services	53.3	37.4	19.9
Column (1)	(2)	(3)	(4)

*Source: Metra Pty Ltd (June 1993 *Op Cit,* pages 5 - 8)
**Calculation by Ratio Consultants (Column 2 x Column 3)

TABLE F2
APPROXIMATE DISTRIBUTION OF ESCAPE EXPENDITURES FOR SHOPPING BY MUDGEE SHIRE RESIDENTS (Calculated from In - Centre Survey, December 1999, refer Table Set E, Q13).

Job No. 4464

CITY OR TOWN	Proportion of Mudgee Survey Sample, who have visited Cities and Towns during 1998/99* %	Proportion of Sample indicating primary purpose as shopping* %	Proportion of respondents who have shopped at Cities or Towns outside Mudgee during 1998/99** %	Approximate distribution of Escape Expenditures from Mudgee for shopping by destination City / Town *** %
Bathurst	76.2	36.9	28.1	18.6
Dubbo	69.4	71.9	50.0	33.0
Orange	66.5	76.6	50.9	33.6
Western Sydney	41.4	15.3	6.3	4.2
Other Sydney	51.8	26.3	13.6	9.0
Other Towns / Cities	27.4	8.6	2.4	1.6
Total	No estimate made	Not directly surveyed	N.App	100.0
Column (1)	(2)*	(3)	(4)	(5)

***Refer Table Set E, Q13.**
****Column 2 x Column 3.**
*****Summation of Column 4 expressed in percentage terms.**

Table Set G

Comparative Retail Performance of Mudgee with other Cities and Towns in Regional New South Wales (1991/92 Retail Census)

TABLE G1
BATHURST
Retail Goods Floorspace, Employment and Turnover
at the Retail and Services Census (1991 - 92)

Major Store Type	Total Employment No. Persons	Annual Turnover $,000 at 1991/92 Prices	Floorspace Square Metres	Retail Employment Density Total Retail Jobs / ,00m2 Floorspace	Retail Turnover Density Annual Turnover / m2 Gross Leaseable Floor Area $ (1991/92 Prices)	Annual Turnover / Employee $(1991/92 Prices)
Supermarket and Grocery Stores (5110)	n/a	n/a	n/a	n/a	n/a	n/a
Specialised Food Retailing (512)	n/a	n/a	n/a	n/a	n/a	n/a
Total Food Retailing (51)	873	85,843	17,500	5.0	4,905.3	98,331.1
Total Personal and Household Goods (52)	776	90,949	43,400	1.8	2,095.6	117,202.1
Total Retail Goods (51 + 52)	1,649	176,792	60,900	2.7	2,902.9	107,211.6

TABLE G2
DUBBO
Retail Goods Floorspace, Employment and Turnover
at the Retail and Services Census (1991 - 92)

Major Store Type	Total Employment No. Persons	Annual Turnover $,000 at 1991/92 Prices	Floorspace Square Metres	Retail Employment Density Total Retail Jobs / ,00m2 Floorspace	Retail Turnover Density Annual Turnover / m2 Gross Leaseable Floor Area $ (1991/92 Prices)	Annual Turnover / Employee $(1991/92 Prices)
Supermarket and Grocery Stores (5110)	457	67,911	10,900	4.2	6,230	148,602
Specialised Food Retailing (512)	598	33,572	8,600	7.0	3,904	56,140
Total Food Retailing (51)	1,055	101,663	19,500	5.4	5,213	96,363
Total Personal and Household Goods (52)	1,206	139,126	55,700	2.2	2,498	115,362
Total Retail Goods (51 + 52)	2,261	240,789	75,200	3.0	3,202	106,497

TABLE G3
MUDGEE SHIRE
Retail Goods Floorspace, Employment and Turnover
at the Retail and Services Census (1991 - 92)

Major Store Type	Total Employment No. Persons	Annual Turnover $,000 at 1991/92 Prices	Floorspace Square Metres	Retail Employment Density Total Retail Jobs / ,00m2 Floorspace	Retail Turnover Density Annual Turnover / m2 Gross Leaseable Floor Area $ (1991/92 Prices)	Annual Turnover / Employee $(1991/92 Prices)
Supermarket and Grocery Stores (5110)	264	41,754	9,300	2.8	4,490.0	158,159.0
Specialised Food Retailing (512)	172	9,976	3,200	5.4	3,118.0	58,000.0
Total Food Retailing (51)	436	51,730	12,500	3.5	4,138.0	118,647.0
Total Personal and Household Goods (52)	419	38,071	18,300	2.3	2,080.0	90,862.0
Total Retail Goods (51 + 52)	855	89,801	30,800	2.8	2,916.0	105,030.0

TABLE G4
ORANGE
Retail Goods Floorspace, Employment and Turnover
at the Retail and Services Census (1991 - 92)

Major Store Type	Total Employment No. Persons	Annual Turnover $,000 at 1991/92 Prices	Floorspace Square Metres	Retail Employment Density Total Retail Jobs / ,00m2 Floorspace	Retail Turnover Density Annual Turnover / m2 Gross Leaseable Floor Area $ (1991/92 Prices)	Annual Turnover / Employee $(1991/92 Prices)
Supermarket and Grocery Stores (5110)	421.0	64,008.0	12,100.0	3.5	5,289.9	152,038.0
Specialised Food Retailing (512)	488.0	32,213.0	9,800.0	5.0	3,287.0	66,010.2
Total Food Retailing (51)	909	96,221	21,900	4.2	4,393.7	105,853.7
Total Personal and Household Goods (52)	1,104	119,646	48,600	2.3	2,461.9	108,375.0
Total Retail Goods (51 + 52)	2,013	215,867	70,500	2.9	3,061.9	107,236.5

TABLE G5
WELLINGTON SHIRE
Retail Goods Floorspace, Employment and Turnover
at the Retail and Services Census (1991 - 92)

Major Store Type	Total Employment No. Persons	Annual Turnover $,000 at 1991/92 Prices	Floorspace Square Metres	Retail Employment Density Total Retail Jobs / ,00m2 Floorspace	Retail Turnover Density Annual Turnover / m2 Gross Leaseable Floor Area $ (1991/92 Prices)	Annual Turnover / Employee $(1991/92 Prices)
Supermarket and Grocery Stores (5110)	103	11,324	2,100	4.9	5,392.4	109,941.7
Specialised Food Retailing (512)	84	4,535	2,000	4.2	2,267.5	53,988.1
Total Food Retailing (51)	187	15,859	4,100	4.6	3,868.0	84,807.5
Total Personal and Household Goods (52)	130	9,340	9,000	1.4	1,037.8	71,846.2
Total Retail Goods (51 + 52)	317	25,199	13,100	2.4	1,923.6	79,492.1

Table Set H

Household Expenditure Survey by Household Income Group
Australia (1993 – 1994)

TABLE H1
HOUSEHOLD EXPENDITURE SURVEY BY HOUSEHOLD INCOME GROUP
AUSTRALIA (1993 - 1994).

Source: ABS Catalogue No. 6535.0
Job No. 4464

COMMODITY (Group)	Australian Standardised Household Income Quintile Groups					
	FIRST QUINTILE	SECOND QUINTILE	THIRD QUINTILE	FOURTH QUINTILE	FIFTH QUINTILE	ALL H/h's
	Annual Household Expenditure 1993/94 Prices $.					
Daily Consumed Items	810	1,204	1,447	1,585	1,642	1,337
Fresh Meat & Seafood	385	571	616	651	834	612
Fresh Fruit & Vegetables	399	544	569	671	815	600
Supermarket / Weekly Groceries	1,737	2,423	3,071	3,455	4,209	2,979
Alcoholic Beverages	400	636	905	1,057	1,542	908
Snacks, Take Away Food	233	359	612	817	1,131	631
Meals in Restaurants, Hotels, etc	335	497	670	1,049	1,961	903
TOTAL FOOD & GROCERY	**4,299**	**6,234**	**7,890**	**9,286**	**12,134**	**7,968**
Total Clothing & Drapery	811	1,098	1,675	2,291	3,657	1,906
Furniture & Furnishings	432	618	800	1,029	1,749	926
Electrical Appliances	439	748	1,121	1,300	1,725	1,067
Hardware	111	165	254	316	442	257
Pharmaceutical Items	230	281	295	365	442	322
Books & Stationery	287	387	505	602	876	532
Other Miscellaneous	739	1,062	1,536	1,922	2,928	1,635
TOTAL HOUSEHOLD GOODS	**3,050**	**4,360**	**6,186**	**7,824**	**11,819**	**6,647**
TOTAL RETAIL COMMODITIES	**7,349**	**10,594**	**14,077**	**17,110**	**23,953**	**14,615**

TABLE H2
CALCULATION OF CALIBRATION COEFFICIENTS
NEW SOUTH WALES COUNTRY - HOUSEHOLD EXPENDITURE PROFILES (1993/1994)

Source: ABS, Catalogue No. 6535.0, Tables 20, 26.
Job No. 4464

Broad Expenditure Group	Average Weekly Expenditure ($) (1993 / 1994)		Calibration Factor
	Australia (Table 26)	NSW (Non - Metropolitan) (Table 20)	NSW (Non - Metropolitan) / Australia
Food, non-alchoholic beverages, alchoholic beverages and tobacco.	137.65	132.54	0.963
Clothing and Footwear	33.71	30.33	0.900
Household Furnishings and Equipment	39.56	41.89	1.059

TABLE H3
NEW SOUTH WALES:
CALCULATION OF RETAIL SALES / CAPITA CHANGE RATIOS (1991 - 1993)

Source: ABS Catalogue No. 8501.0
Job No. 4464

Commodity Group	1991 (Year Ended December)		1993 (Year Ended December)		
	Annual Sales (Current Prices)	Annual Retail Sales Per Capita*	Annual Sales (Current Prices)	Annual Retail Sales Per Capita*	Retail Sales / Capita Change Ratio (1991 / 1993)
		$		$	
Food	10,962.1	1,857.7	12,025.2	2,005.2	0.926
Clothing, and soft good retailing	2,341.9	396.7	2,395.8	399.4	0.993
Household Goods	7,511.2	1,272.8	7,923.7	1,321.1	0.963
Other	4,612.4	781.6	4,902.9	817.6	0.956
Total Retail Goods	25,427.6	4,308.8	27,247.6	4,543.3	0.948

***Estimated Resident Population in NSW** **1991 = 5.901 Million (ABS Catalogue No. 3201.0)**
1993 = 5.997 Million (ABS Catalogue No. 3201.0)

TABLE H4
NEW SOUTH WALES:
CALCULATION OF RETAIL SALES / CAPITA CHANGE RATIOS (1993 - 1999)

Source: ABS Catalogue No. 8501.0
Job No. 4464

Commodity Group	1993 (Year Ended December)		1999 (Year Ended November)		
	Annual Sales (Current Prices)	Annual Retail Sales Per Capita*	Annual Sales (Current Prices)	Annual Retail Sales Per Capita*	Retail Sales / Capita Change Ratio (1993 - 1999)
		$		$	
Food	12,025.2	2,005.2	16,761.6	2,614.5	1.308
Clothing, and soft good retailing	2,395.8	399.5	3,509.1	547.3	1.369
Household Goods	7,923.7	1,321.3	8,793.9	1,371.7	1.109
Other	4,902.9	817.6	6,547.1	1,021.2	1.249
Total Retail Goods	27,247.6	4,543.6	35,611.7	5,554.7	1.223

***Estimated Resident Population in NSW** **1993 = 5.997 Million (ABS Catalogue No. 3201.0)**
1999 = 6.411 Million (ABS Catalogue No. 3201.0)

TABLE H5
NEW SOUTH WALES COUNTRY - HOUSEHOLD RETAIL EXPENDITURE PROFILES
BY HOUSEHOLD INCOME GROUP (1993 / 1994)
Base of Calculation: Table H1 x Table H2 x 52

Job No. 4464

	Annual Retail Goods Expenditures ($ at 1993/1994 Prices)					
Broad Expenditure Group	**FIRST QUINTILE**	**SECOND QUINTILE**	**THIRD QUINTILE**	**FOURTH QUINTILE**	**FIFTH QUINTILE**	**ALL HOUSEHOLDS**
	Lowest				**Highest**	
Food, groceries and liquor	4,140.2	6,003.4	7,598.2	8,938.8	11,684.9	7,673.6
Clothing, drapery and footwear	730.1	987.5	1,507.5	2,061.8	3,291.1	1,715.5
Household goods	3,229.7	4,589.5	6,551.5	8,285.7	1,251.4	7,038.7
Total Retail Goods	8,100.0	11,580.4	15,657.2	19,286.3	16,227.4	16,427.8

TABLE H6
NEW SOUTH WALES COUNTRY - HOUSEHOLD RETAIL EXPENDITURE PROFILES
BY HOUSEHOLD INCOME GROUP (1991 / 1992) AT CURRENT PRICES
Base of Calculation: Table H3 x Table H5 x 52

Job No. 4464

	Annual Retail Goods Expenditures ($ at 1991/1992 Prices)					
Broad Expenditure Group	**FIRST QUINTILE**	**SECOND QUINTILE**	**THIRD QUINTILE**	**FOURTH QUINTILE**	**FIFTH QUINTILE**	**ALL HOUSEHOLDS**
	Lowest				**Highest**	
Food, groceries and liquor	3,834.0	5,559.3	7,036.1	8,277.4	10,820.2	7,105.8
Clothing, drapery and footwear	676.0	980.7	1,497.1	2,047.2	3,268.2	1,703.5
Household goods	3,087.8	4,419.5	6,309.2	7,978.9	12,053.1	6,778.2
Total Retail Goods	7,597.7	10,959.5	14,842.4	18,303.5	26,141.4	15,587.5

TABLE H7
NEW SOUTH WALES COUNTRY - HOUSEHOLD RETAIL EXPENDITURE PROFILES
BY HOUSEHOLD INCOME GROUP (1998 / 1999) AT CURRENT PRICES
Base of Calculation: Table H4 x Table H5 x 52

Job No. 4464

	Annual Retail Goods Expenditures ($ at 1998/1999 Prices)					
Broad Expenditure Group	**FIRST QUINTILE**	**SECOND QUINTILE**	**THIRD QUINTILE**	**FOURTH QUINTILE**	**FIFTH QUINTILE**	**ALL HOUSEHOLDS**
	Lowest				**Highest**	
Food, groceries and liquor	5,415.3	7,852.5	9,938.2	11,692.2	15,283.8	10,037.0
Clothing, drapery and footwear	999.4	1,351.5	2,063.9	2,822.6	4,505.3	2,348.3
Household goods	3,581.8	5,089.8	7,265.4	9,188.9	13,880.9	7,805.7
Total Retail Goods	9,996.5	14,293.8	19,267.6	23,703.7	33,670.0	20,191.1

TABLE H8
Comparative Household Income Distributions:
Country and Regional New South Wales and Mudgee Shire (1991)

Source: Census of Population and Housing, 1991 ABS.
Job No. 4464.

AREA	Household Income Quintile Groups Standardised for Country and Regional NSW Annual Household Income (1991 prices) $.				
	< $12,524 % Households	$12,524 - $19,412 % Households	$19,413 - 30,278 % Households	$30,278 - $46,415 % Households	> $46,415 % Households
Country and Regional New South Wales*	20.0	20.0	20.0	20.0	20.0
Mudgee Shire	22.9	20.3	19.7	17.4	19.7

*State of New South Wales less the Sydney Statistical Division.

TABLE H9
Comparative Household Income Distributions:
Country and Regional NSW and Mudgee Shire (1996)

Source: Census of Population and Housing , 1996, ABS.
Job No 4464.

AREA	Household Income Quintile Groups Standardised for Country and Regional NSW Annual Household Income (1996 prices) $.				
	< $13,970 % Households	$13,971 - $24,819 % Households	$24, 820 - $36,263 % Households	$36,264 - $56,969 % Households	> $56,969 % Households
Country and Regional New South Wales*	20.0	20.0	20.0	20.0	20.0
Mudgee Shire	15.4	28.0	20.2	19.2	17.2

*State of New South Wales less the Sydney Statistical Division.

TABLE H10
New South Wales: Calculation of Retail Sales / Capita Change Ratios
(1991/92 - 1998/99)

Source: ABS Catalogue No. 8501.0
Job No 4464.

COMMODITY GROUP	1991/92 (Year Ended December 1991)		1998/99 (Year Ended November 1999)		Retail Sales / Capita Change Ratio 1991/92 - 1998/99
	Annual Sales / Current Prices) $ Million	Annual Retail Sales Per Capita $*	Annual Sales / Current Prices) $ Million	Annual Retail Sales Per Capita $*	
Food	10,962.1	1,857.7	16,761.6	2,614.5	1.407
Clothing, and Soft Good Retailing	2,341.9	396.7	3,509.1	547.3	1.380
Household Goods	7,511.2	1,272.8	8,793.9	1,371.7	1.078
Other	4,612.4	781.6	6,547.1	1,021.2	1.307
Total Non-Food Retail Goods	14,465.5	2,451.4	18,850.1	2,940.3	1.199
Total Retail Goods	25,427.6	4,309.0	35,611.7	5,554.8	1.289

*Estimated Resident Population in NSW 1991 = 5.901 million (ABS Catalogue No. 3201.0)
1996 = 6.411 million (ABS Catalogue No. 3201.0)

TABLE H11
Characteristics: New South Wales (1991/92)
Retail Turnover Density

Source: Retailing in New South Wales (1991/92) ABS. Catalogue 8632.1 and Estimated Information from the 1991/92 Census of Retail and Selected Service Establishments. Job No 4464.

STORE TYPE	Retail Turnover Density (1991/92 prices) $ turnover / m2 GLA / annum			
	Metropolitan Sydney	Country and Regional New South Wales	New South Wales Mid Western Regional Towns and Cities*	Mudgee
Supermarket and Grocery Stores	5,990	4,705	5,290 - 6,230** (5,637)	4,490
Food Speciality Stores	3,983	3,221	2,268 - 3,904 (3,153)	3,118
All Food, Grocery and Liquor Stores	4,889	4,081	3,868 - 5,213 (4,595)	4,138
Non-Food Retail Goods	2,844*	2,089	2,096 - 2,498 (2,352)	2,080
All Retail Goods Stores	3,492	2,774	2,903 - 3,202 (3,056)	2,916

*For food, grocery and liquor stores: The cities of Dubbo and Orange, the town of Wellington and the City of Bathurst (total retail food only for Bathurst). For non-food retail goods: The cities of Bathurst, Dubbo and Orange.

**Range and mean of Retail Turnover Density's for the cities and towns analysed.

TABLE H12
Retail Turnover Density Requirements for Mudgee (1998/99)

Job No 4464.

MAJOR STORE TYPE	Retail Turnover Density (1991/92 prices) $ turnover / m2 GLA / annum		Retail Sales / Capita Change Ratios for New South Wales (1991/92 - 1998/99)* (Refer Table H10)	Retail Turnover Density Requirements for Mudgee (1998/99 prices) $ turnover / m2 GLA / annum
	New South Wales Mid Western Towns and Cities	Mudgee		
All Food, Grocery and Liquor Stores	3,868 - 5,213 (4,595)	4,138	1.407	5,822 - 6,465 (6,144)
Non-Food Retail Goods Stores	2,096 - 2,498 (2,352)	2,080	1.199	2,494 - 2,820 (2,657)

*For the period 1991/92 - 1998/99, consumer price index (Sydney) and average weekly earnings growth ratio (NSW) are in the range 1.14 - 1.27 with mean value of 1.205.

TABLE H13
Mudgee Shire: Calculation of Supportable Retail Floorspace / Household on the Basis of Household Retail Expenditures and Retail Turnover Density Requirements (1998/99 Prices).

Job No 4464.

MAJOR RETAIL CATEGORY	Mudgee Shire Average Retail Expenditures / Resident Household (1998/99 prices) $	Mudgee Shire Retail Turnover Density Requirements (1998/99 prices) $ turnover / m2 GLA / annum	Mudgee Shire Supportable Retail Floorspace / Resident Household m2
Food, Groceries and Liquor	9,913.90	6,144	1.61
Non - Food Retail Goods	9,862.20	2,657	3.71
Total Retail Goods	19,776.10	Not Calculated	5.32

TABLE H14
Mudgee Shire: Estimated Total Retail Goods Expenditures by Resident Households (1991/92 Prices)

Job No. 4464.

MAJOR COMMODITY GROUP	Average Expenditures / Resident Household / Annum (1991/92 Prices) $	Total Retail Goods Expenditures by Resident Households (1991/92 Prices) $,000
Food, Groceries and Liquor	6,965	41,163*
Non-Food Retail Goods	8,259	48,811*
Total Retail Goods	15,224	89,974
Column (1)	(2)	(3)

*Based on a comparative analysis of retail sales, it is estimated that no less than 5% of non-food retail goods expenditures made by resident households is spent in supermarkets. This minimal estimate of supermarket, liquor and other food turnover attributable to Mudgee Residents at 1991/92 = $41.163m + .05 * $48.811m = $43.604m.

TABLE H15
Mudgee Shire: Estimated Escape Expenditures by Resident Households (1991/92).

Job No. 4464.

MAJOR STORE TYPE	Annual Turnover (1991/92 prices) $,000	Retail Goods Expenditures by Resident Households (1991/92 prices) $,000	Net Inbound Turnover (Generated by Non-Mudgee Residents) (1991/92 prices) $,000**	Proportion of Turnover Supported from Beyond Mudgee Shire (1991/92 prices) %***	Escape Expenditures by Mudgee Residents (1991/92)	
					(1991/92 prices) $,000****	As a Proportion of Retail Goods Expenditures by Resident Households %
Supermarkets, Groceries and Liquor Stores	51,730	43604*	8,126	15.7	Neg.	Neg.
Personal and Household Goods Stores	38,071	35,406	2,665	7.0	10,964	23.6*****
Total: Retail Goods Stores	89,801	79,010	10,791	12.0	10,964	12.2******
Column (1)	(2)	(3)	(4)	(5)	(6)	(7)

*Allows for non-food retail goods expenditures made at supermarkets and other food stores over and above allocations allowed for in Household Expenditure Profile, Refer Table 14.
Refer footnote Table 14.
**Column (2) - Column (3).
***(Column (4) / Column (2)) x 100 / 1.
****For food and groceries expenditures, escape is approximately zero.
For non-food expenditures, escape expenditures calculated at Table H14, Column 3 (.95) - Table H15, Column 3.
'=(48,811)(.95) - 35,406 = 10,964
*****Calculated as (Table H15, Column 6 / .95(Table H14, Column 3)) x 100 / 1.
******Calculated as (Table H15, Column 6 / Table H14, Column 3) x 100 / 1.

Table Set J

Mudgee CBD : Assessment of Car Parking Supply and Utilisation
(December 1999)

TABLE J1
MUDGEE CENTRAL BUSINESS DISTRICT:
ASSESSMENT OF CAR PARKING SUPPLY AND UTILISATION (1999)

TOWN CENTRE PRECINCT (refer Figure 7)	ON STREET PARKING		OFF STREET PARKING		TOTAL PUBLIC ACCESS (off street and on street)		PRIVATE ACCESS (non-residential) PROPERTIES	TOTAL CAR PARKING SUPPLY (on street and off street, public and private access) No. of spaces
	SUPPLY * No. of spaces	PEAK UTILISATION* % of spaces occupied	SUPPLY * No. of spaces	PEAK UTILISATION* % of spaces occupied	SUPPLY * No. of spaces	PEAK UTILISATION* % of spaces occupied	SUPPLY* No. of spaces	
RETAIL CORE AREA	160	94.4	240	87.5	400	90.3	93	493
SUPPORTING SERVICES AREA	536	61.0	220	59.1	756	60.4	202	958
SOUTHERN COMMERCIAL AREA	158	48.7**	27	N.A	185	48.7**	38	223
TOTAL: MUDGEE TOWN CENTRE (Retail Core Area and Commercial Precincts)	854	65.2	487	69.8	1,341	66.9	333	1,674

***Surveyed, Friday 3rd December. Peak car parking utilisation time for the CBD as a whole was 12.00 noon.**
****Off street utilisation only.**

Table J.2

Mudgee Retail Study (2000)
Assessment of Peak Car Parking Demands in relation to Retail Shop Floorspace
(based on floorspace and car parking demands, December 1999)

Item No.	Description	Unit
1	Occupied retail goods floorspace in Mudgee CBD (December 1999) Food and non-food retail goods stores (refer Table D) • m^2 gross leasable area	21,966
2	Occupied retail goods floorspace in the retail core area and supporting services area of the Mudgee CBD (refer Figure xx) • m^2 gross leasable area	17,986
3	Retail core area and supporting services area : Current supply of publicly accessible carpark (refer Table J.1) • Number of car spaces	1,156
4	Retail core area and supporting services area : Peak utilisation of car parking spaces (refer Table J.1) • % of car parking spaces occupied • number of car parking spaces occupied	70.7 818
5	Retail core area and supporting services area : Occupied retail goods gross floor area Item 2 x 1.053 • m^2 gross floor area	18,930
6	Retail core area and supporting services area : Estimated proportion of car parking demand attributable to shopping demands (either directly or associated with other activities) (refer Table Set E, Q5) • % of car parking demands	77.5
7	Retail core area and supporting services area : Peak car parking demand attributable to shopping requirements Item 4 x item 7 • number of car parking spaces	634
8	Retail core area and supporting services area : Peak car parking demand attributable to shopping requirements. Item 7 ÷ item 5/100 Rate of car parking demand per $100m^2$ gross floor area	3.35

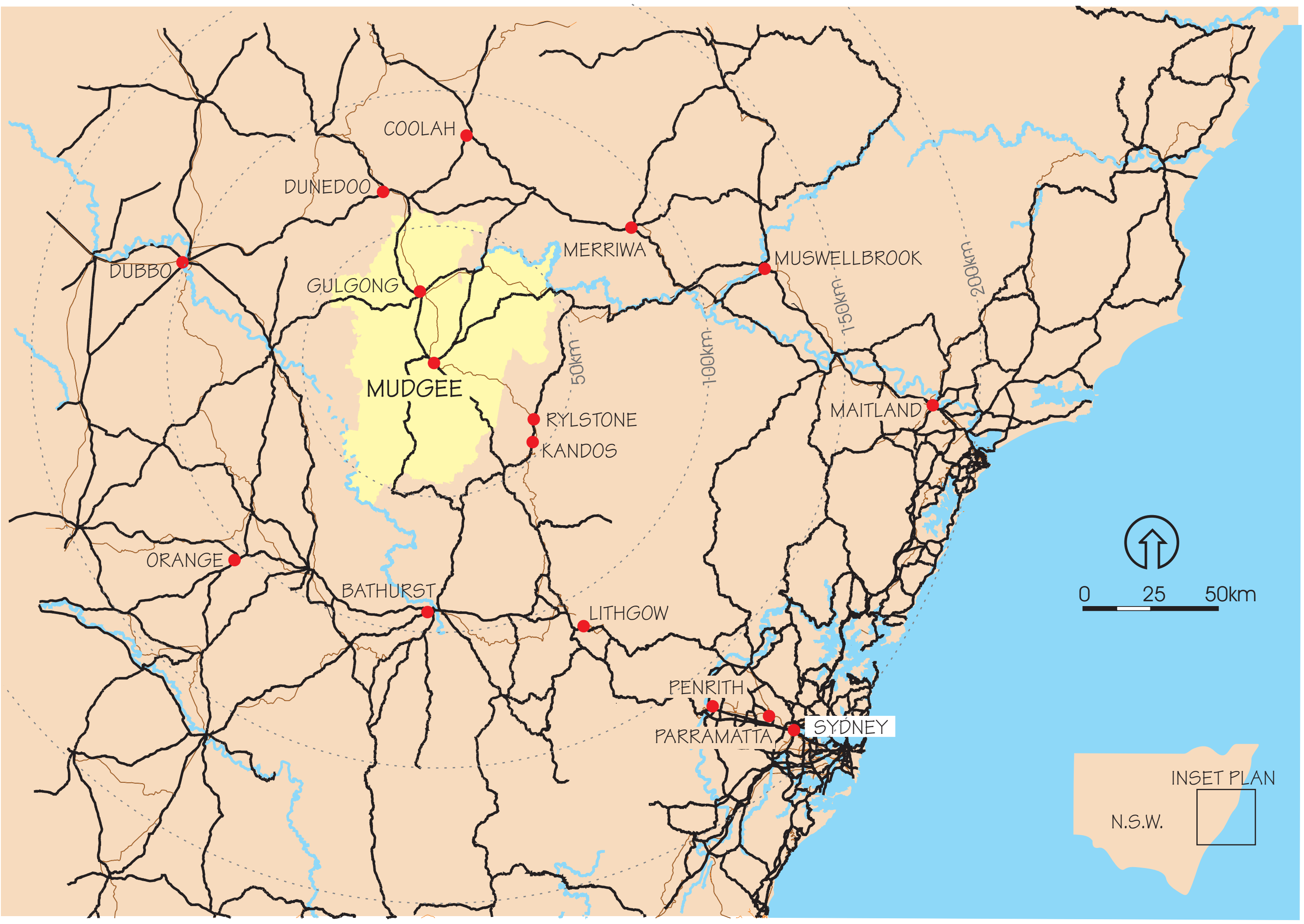


Figure 1

GENERAL LOCATION OF MUDGEE

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464 March 2000

RATIO

'Riverwalk', First Floor, 649 Bridge Road
Richmond, Victoria 3121 Australia
Telephone (03) 9429 3111, Facsimile (03) 9429 3011
E-mail : mail@ratio.com.au

RATIO

'Riverwalk', First Floor, 649 Bridge Road
Richmond, Victoria 3121 Australia
Telephone (03) 9429 3111, Facsimile (03) 9429 3011
E-mail : mail@ratio.com.au

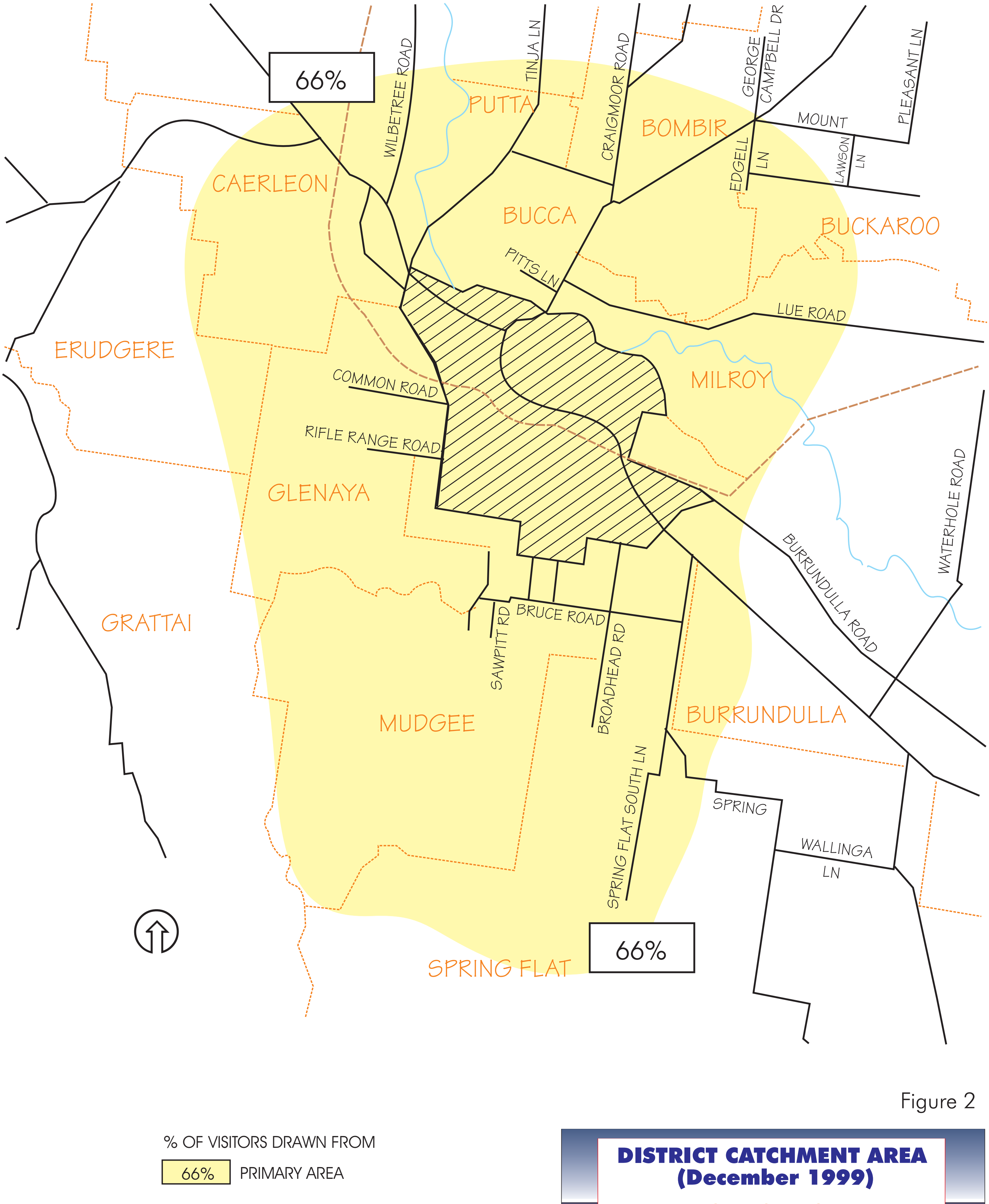


Figure 2

DISTRICT CATCHMENT AREA (December 1999)

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464 January 2000

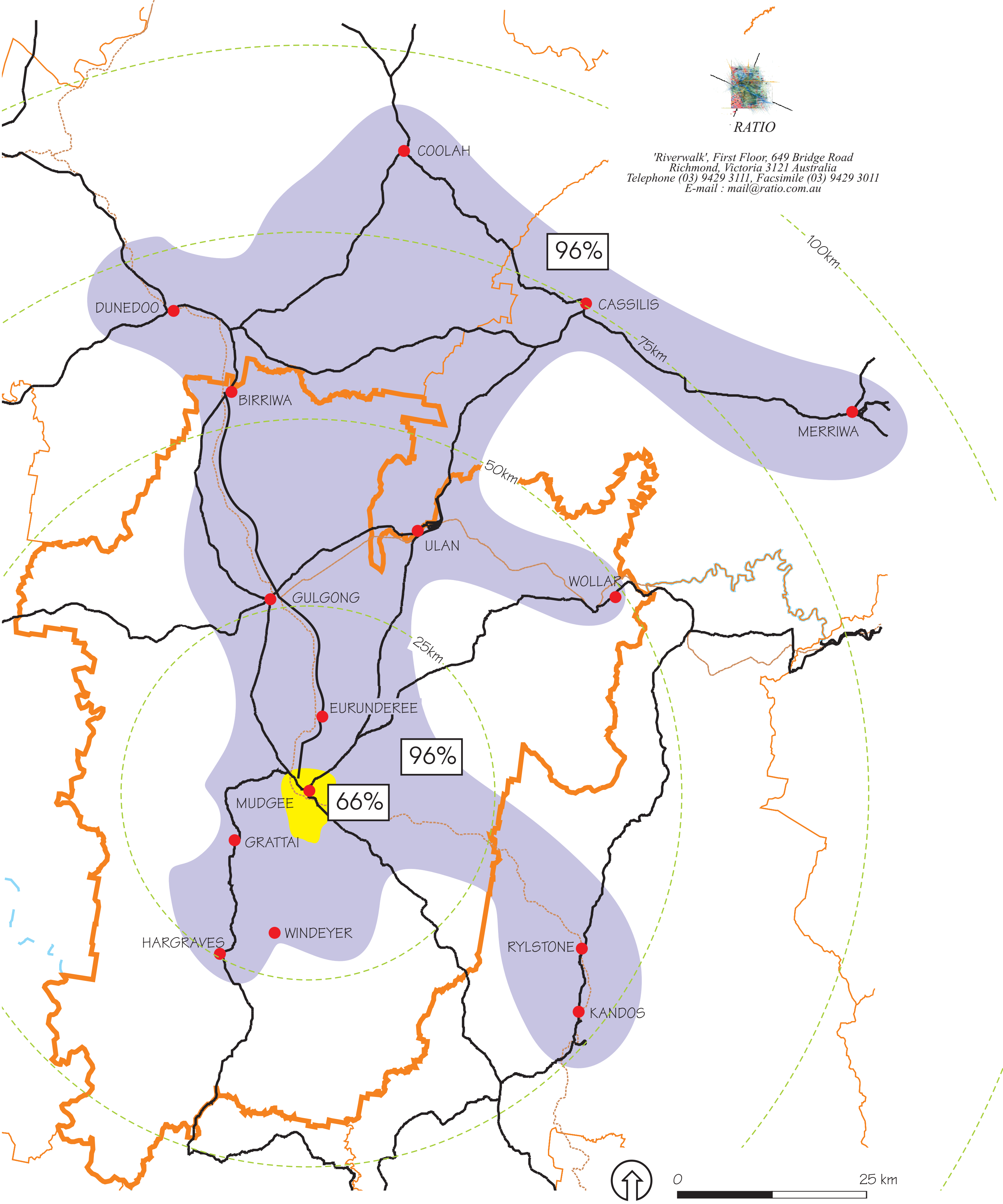


Figure 3

% OF VISITORS DRAWN FROM

66%	PRIMARY AREA
96%	SECONDARY AREA
	MUDGEE SHIRE BOUNDARY

REGIONAL CATCHMENT AREA (December 1999)

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464 January 2000

	CBD RETAIL CORE
	CBD RETAIL ATTRACTORS
	RETAIL SERVICES
	PROFESSIONAL SERVICES
	ENTERTAINMENT / HOSPITALITY
	OFFICE
	BULKY GOODS
	NON-CORE / SUPPORTING / SECONDARY / LOCAL SHOPPING
	GOVERNMENT & INSTITUTIONAL
	LIGHT INDUSTRIAL WAREHOUSE / AUTOMOTIVE TRADES
	UTILITIES
	BUILDING SUPPLIES / FARM SUPPLIES
	RESIDENTIAL
RV	RETIREMENT VILLAGE
	PUBLIC OPEN SPACE
	CAR PARKS (PUBLIC ACCESS)
	CAR PARKS (PRIVATE ACCESS)
V	VACANT LAND / VACANT BUILDING / VACANT SITE UNDER CONSTRUCTION

* FOR GUESTS & VISITORS TO THE SOLDIERS CLUB

0 100m

RATIO

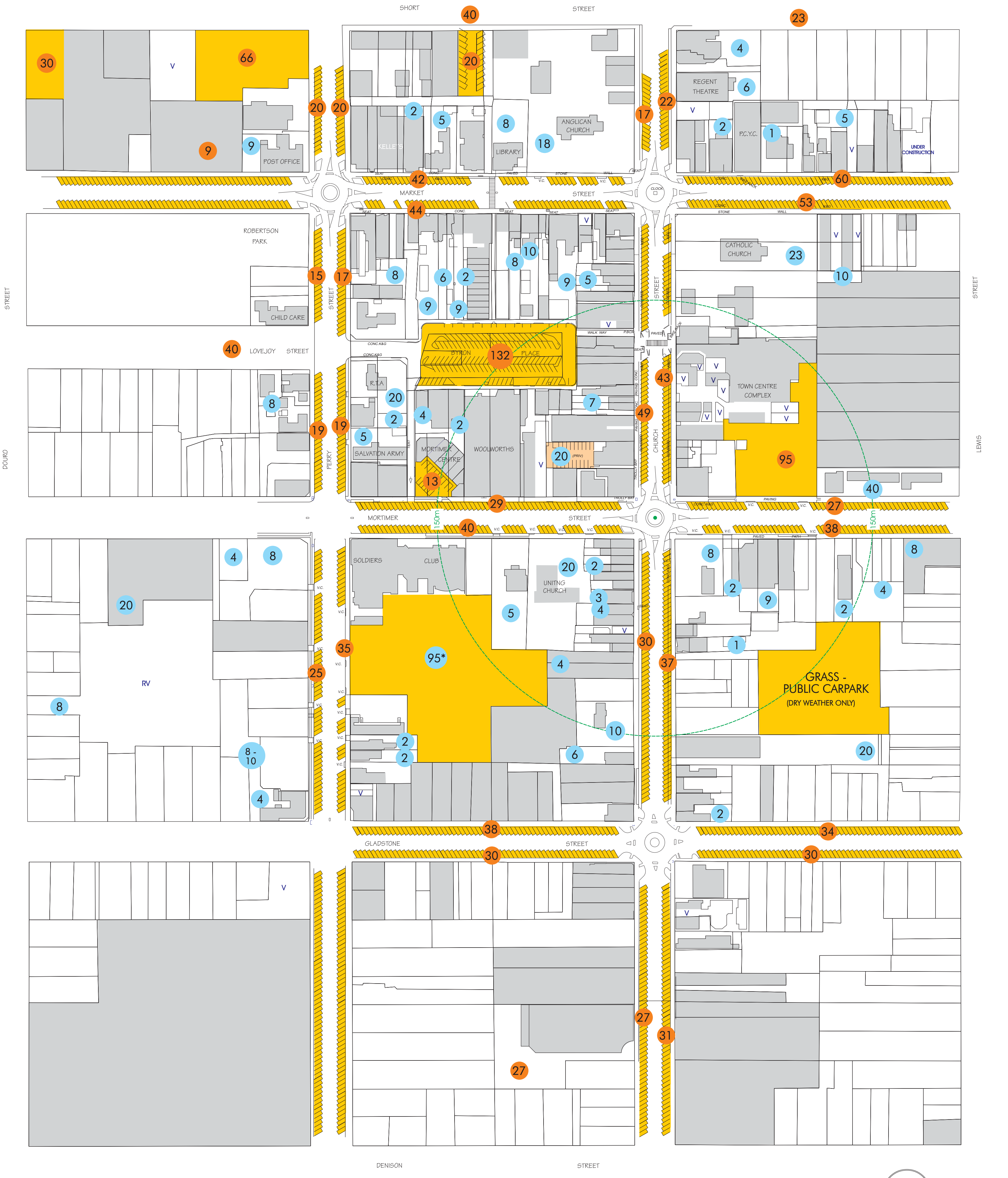
'Riverwalk', First Floor, 649 Bridge Road
Richmond, Victoria 3121 Australia
Telephone (03) 9429 3111, Facsimile (03) 9429 3011
E-mail : mail@ratio.com.au

Figure 4

EXISTING LAND USE (DECEMBER 1999)

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464 April 2000



0 100m

8 CAR PARKS (PUBLIC ACCESS)

8 CAR PARKS (PRIVATE ACCESS)

* FOR GUESTS & VISITORS
TO THE SOLDIERS CLUB

RATIO

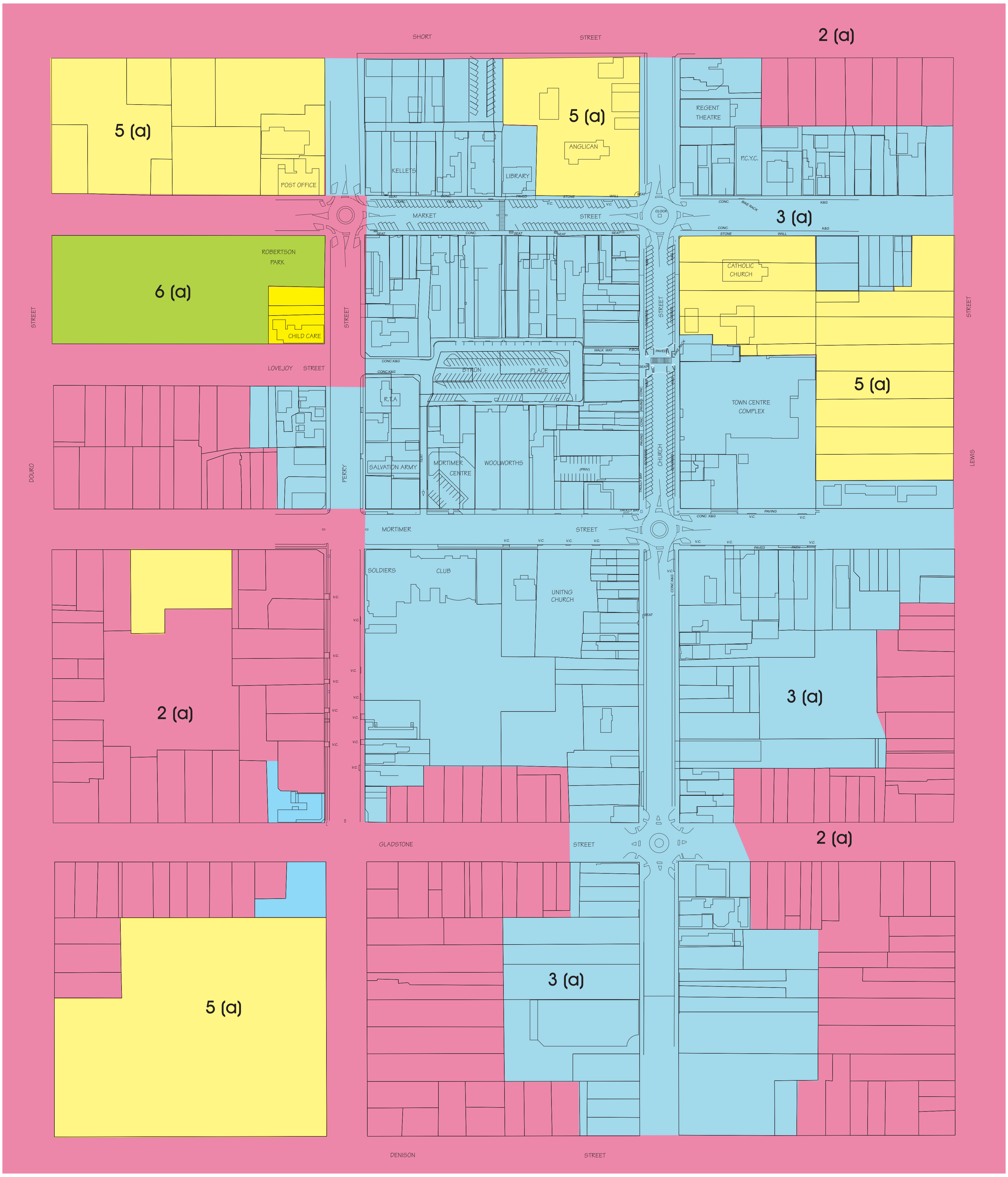
'Riverwalk', First Floor, 649 Bridge Road
Richmond, Victoria 3121 Australia
Telephone (03) 9429 3111, Facsimile (03) 9429 3011
E-mail : mail@ratio.com.au

Figure 5

CARPARKING
(Approx. Number of spaces in circles)

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464 April 2000



2 (a) - RESIDENTIAL

3 (a) - BUSINESS

5 (a) - SPECIAL USES (SCHOOLS etc.)

6 (a) - EXISTING RECREATION

RATIO

'Riverwalk', First Floor, 649 Bridge Road
Richmond, Victoria 3121 Australia
Telephone (03) 9429 3111, Facsimile (03) 9429 3011
E-mail : mail@ratio.com.au

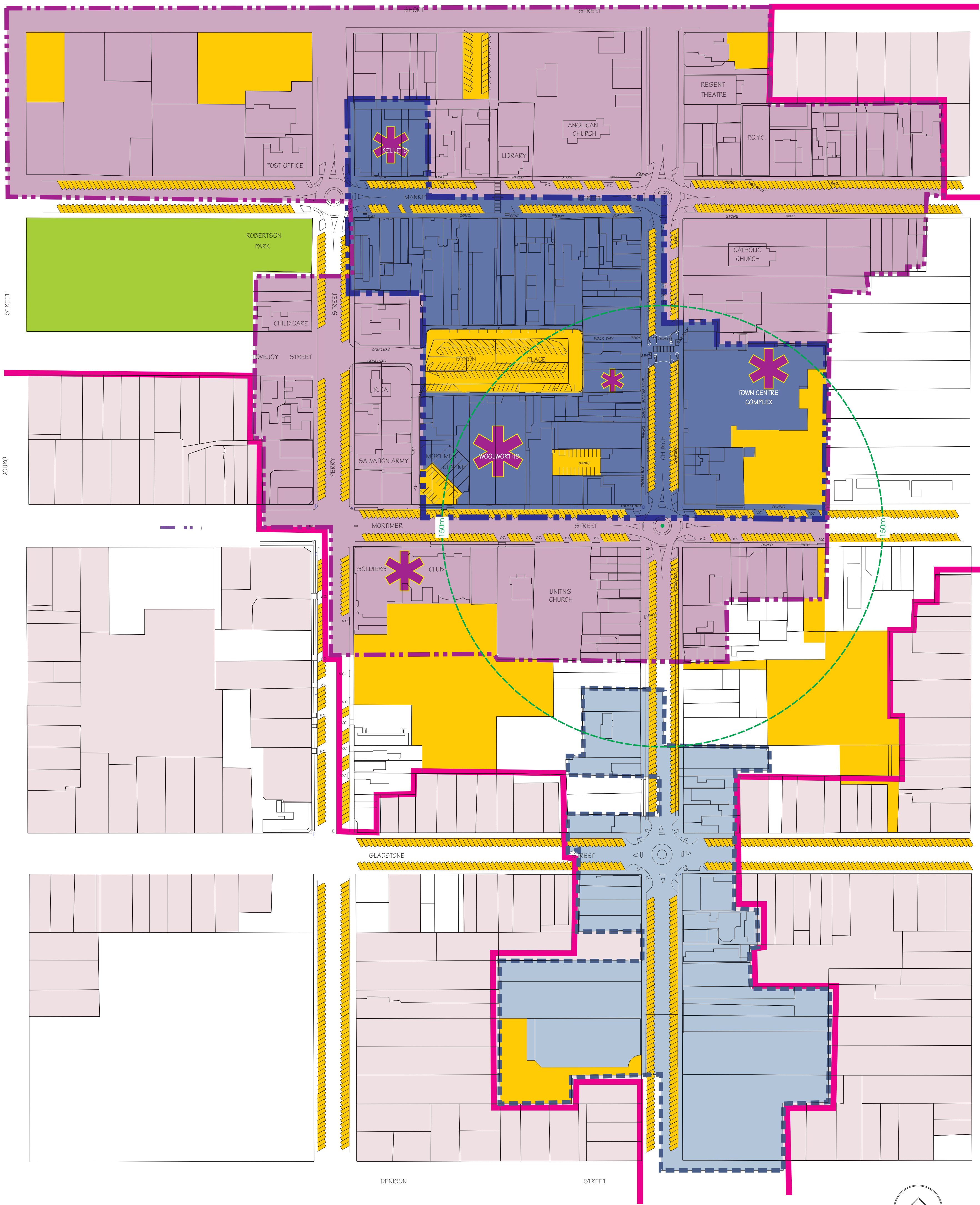
Figure 6

EXISTING ZONES

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464

April 2000



RETAIL CORE AREA

SUPPORTING SERVICES AREAS

SOUTHERN COMMERCIAL PRECINCT

INNER CITY RESIDENTIAL PRECINCTS

MAJOR ATTRACTORS

CARPARKS

0 100m

RATIO

'Riverwalk', First Floor, 649 Bridge Road
Richmond, Victoria 3121 Australia
Telephone (03) 9429 3111, Facsimile (03) 9429 3011
E-mail : mail@ratio.com.au

Figure 7

FUNCTIONAL PRECINCTS

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464 April 2000

RETAIL CORE AREA

MAJOR ATTRACTORS

PRIORITY FOCUS AREA
FOR NEW RETAIL BASED DEVELOPMENT

EXISTING PRINCIPAL SHOPPING STREET

IMPORTANT COMMERCIAL SERVICES STREET

PREFERRED EXTENSION OF PRINCIPAL SHOPPING STREET

POTENTIAL RETAIL - COMMERCIAL
DEVELOPMENT SITES

PREFERRED LOCATIONS FOR NEW / IMPROVED
OFF-STREET CAR PARKS

EXISTING CARPARKS

POSSIBLE CAR PARKING ACCESSWAYS

0 100m

RATIO

'Riverwalk', First Floor, 649 Bridge Road
Richmond, Victoria 3121 Australia
Telephone (03) 9429 3111, Facsimile (03) 9429 3011
E-mail : mail@ratio.com.au

Figure 8

STRATEGIC PRINCIPLES FOR NEW RETAIL BASED DEVELOPMENT IN THE MUDGEE CBD

MUDGEE TOWN CENTRE RETAIL STUDY (2000)

Project: 4464 April 2000