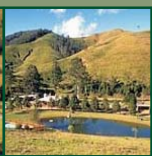
DEVELOPMENT EMPLOYMENT LAND & COMMERCIAL/RETAIL STRATEGY: BUSINESS STUDY

GLOUCESTER CBD






PREPARED BY: RATIO CONSULTANTS
PREPARED FOR: GLOUCESTER SHIRE COUNCIL

FEBRUARY 2006

Prepared by

Ratio Consultants Pty Ltd

Prepared for

Gloucester Shire Council

February 2006

Our Reference: 6633

Disclaimer:

TABLE OF CONTENTS

Chapter / Section | Page No.

TABLES

APPENDICES

1 INTRODUCTION

1.1 BACKGROUND

Gloucester is an important service town located approximately 112 kilometres north of Newcastle, and some 72 kilometres west of Tuncurry. Settlement in the area dates from the 1820s, with the opening up of the Barrington River for pastoral development, and the discovery of gold at nearby Copeland in the 1870s. The area's economy is supported by beef, dairy and mixed farming, together with tourism. The area's proximity to Newcastle has promoted increased interest for residential living, and the small town atmosphere that Gloucester provides. The Shire's present population is approximately 4,980 persons (June 2005).

There is an increasing interest in residential development in and around the town of Gloucester. Based on current and emerging patterns of residential land take-up, the town's residential development and population is anticipated to significantly increase over the next twenty years and beyond.

In order to provide a clear framework for the integrated development of future retail and commercial activities in the town, Council identified the need to prepare a comprehensive assessment of likely future demands for retail and commercial floorspace and land. It also identified the need for a structure plan to provide a clear long-term planning framework for the town centre's future development that respected its setting and heritage values and identified locations for new development to ensure the long-term vitality and integration of the Gloucester Central Area.

In addition to the assessments of retail and commercial land, and a planning framework for the town centre, Council required an analysis of emerging and projected demands for industrial land in the Shire, and a strategy to ensure industrial land provision to meet the Shire's foreseeable needs.

These requirements provided the impetus to undertake the Gloucester Shire Development Employment Land and Commercial/Retail Strategy. In June 2005, Ratio Consultants was commissioned to undertake the Study.

1.2 STUDY OBJECTIVES

The Study has the following principal objectives:

- to assess historic, current and likely future demands for residential land, and to prepare projections of future households and population for Gloucester and its regional catchment area;
- to assess the current and likely future retail and services role of Gloucester, taking account of the area served by the town (its regional catchment area) and the growing tourism industry;

- to assess the future demand for retail and commercial floorspace and land likely to be required in the Gloucester Central Area on the basis of projected households and population in the town and its regional catchment area, and on the basis of the changing role of the town centre;
- to prepare a structure planning framework and land release strategy for the future retail and commercial development of the Gloucester Central Area, taking full account of the range of values identified by residents and stakeholders to be important in the future planning of the Gloucester Central Area.

1.3 TOWN CONTEXT

Gloucester Shire has an area approximately 2,918 square kilometres. It extends from the Barrington River valley west to the Barrington Tops National Park and northwest to the Woko National Park. The eastern part of the Shire is extensively settled. Principal industries include timber, dairying, beef, tourism and coal mining.

The Shire is accessed by Bucketts Way, a main road loop off the Pacific Highway. The loop’s northern connection is at Nabiac, approximately 20 kilometres south of Taree. The loop’s southern connection is close to Raymond Terrace (an important satellite town of Newcastle, some 24 kilometres northwest of the port city). Access from Gloucester through to the New England area is via Thunderbolts Way. It links with the New England Highway at Bendemeer, strategically placed between Tamworth (some 41 kilometres to the south) and Armidale (69 kilometres to the north). In summary, the town is well connected to the Pacific Highway via Bucketts Way, and to the New England district and southeast Queensland. The Shire’s southern section is also accessible by passenger train to Newcastle.

The town of Gloucester and the villages of Forbesdale, Stratford and Craven are all located on Bucketts Way; and the village of Barrington on Thunderbolts Way. A significant proportion of the Shire’s population is located in the Gloucester township, and most of the potentials for future residential, commercial and industrial land development are in the township.

The township is located at the foot of the Bucketts Ranges. The unique form of the Ranges and the sweeping views afforded from the town provide Gloucester with a unique setting. This, together with the township’s accessibility provide opportunities for the ongoing development of tourism and lifestyle and retirement living.

The township is strategically located between the floodplains of the Gloucester and Avon Rivers. The township’s unique location, defined by the floodplain, provides clear parameters for future residential land development, and thus has set the capacity constraints for the township’s future development. The Local Environmental Study (LES) undertaken for Gloucester has specified the residential capacities of the Shire as follows (refer Gloucester Shire Council, Local Environmental Study 2005, Hunter Development Brokerage Pty Ltd, Sections 6.6.4 – 6.6.7):-

- An optimum population of 8,000-10,000 persons in the Gloucester township;
- Optimum village populations as follows:-
  - Barrington 2,000 persons
  - Stratford 200 persons
  - Craven 100 persons
  - Bundook 100 persons

In total, the Local Strategy Statement determined with the community and an essential component of the Local Environmental Study concluded that “a population base of up to 12,000 persons could be supported Gloucester (Shire) without substantial impact.”

2 PRINCIPAL FINDINGS

2.1 HOUSING DEVELOPMENT AND POPULATION GROWTH

As indicated in Section 1.3, the Gloucester Shire's ultimate population capacity is limited by future available residential land, which is in turn influenced by environmental, social and servicing considerations. The Shire's residential land capacity constraints form part of the Study's parameters. Within this context, the consultants were required to assess future population and housing trends over the next twenty to thirty years.

A local area housing development and population forecasting model was applied to the Shire, utilising dwelling unit approval information from the Australian Bureau of Statistics and census information for the period 1991 – 2001. The analysis indicated the following findings:

- Dwelling unit approvals for the Shire have marginally increased over the period 1991/92 - 2005/06 (from approximately 29 per annum over the five-year period 1991/96 – 1995/96, to 30 per annum over the period 1996/97 – 2000/01, to 32 per annum over the period 2001/02 – 2005/06);
- Current and projected trends indicate that dwelling unit approvals are likely to rise to approximately 35 approvals per annum over the period 2006/07 – 2010/11, and progressively increase to 55 approvals per annum by 2026/27 – 2030/31;
- On this basis, the total dwelling stock for the Shire is projected to rise from approximately 2,270 dwelling units in 2001 to 2,810 units by 2016, to 3,560 units by 2031;
- Households are projected to increase in the Shire, from approximately 1,880 in 2001 to 2,440 by 2016, and 3,310 by 2031;
- Household sizes are projected to continue to fall in the Shire for a number of social and demographic reasons, including ageing of the population, and further projected increases in the divorce rate. In 2001, average household size was approximately 2.576 persons. This is projected to fall to approximately 2.324 persons by 2016, and to 2.139 persons by 2031;
- Taking account of projected household growth and falling household size, the total resident population is projected to increase from approximately 4,840 persons in 2001 to 5,680 persons in 2016, and 7,080 persons by 2031 (refer Table E.2);
- A comparison was undertaken of the projections prepared for the Shire based on future patterns of residential development, households and household sizes, and the projections prepared by the Department of Infrastructure, Planning and Natural Resources (DIPNR), based on a modified cohort-survival model and regional migration model. The results are set out in Table E.3;

- The comparison indicates that the DIPNR projections show virtually no population growth over the period 2006 – 2011, and only marginal growth projected for subsequent periods to 2031. Over the ten-year period 2001 – 2011, the DIPNR projections indicate that the Shire's population is forecast to increase by only 50 persons, or by about 1% over the entire decade. In the following decade, the DIPNR projections indicate that the Shire's population is forecast to increase by a total of 30 persons, or less than 1% over the entire decade; and a similar increase is forecast for the following decade (2021 – 2031);
- The Ratio projections, based on current, emerging and future residential development patterns and trends in household size, indicate significant population growth for the Shire. In the 2001 – 2011 decade, the Shire's population is projected to increase by 470 persons, or by approximately 10% over the entire decade. In the period 2011 – 2021, the Shire's population is projected to increase by a further 770 persons, or by approximately 15% over the entire decade. In the period 2021 – 2031, the Shire's population is projected to increase by a further 1,000 persons, or by approximately 16% over the ten-year period.

  In summary, the current local area projections prepared by the consultants indicate that sustained and significant population growth for the Shire is likely over the next thirty-year period. In contrast, the DIPNR projections indicate no significant growth over the thirty-year period. The key point here is that these projections are not merely a question of analytical interest. They will substantially impact on a range of other issues, including residential land requirements, school requirements and the planning and needs of the town centre and Gloucester's industrial area.

2.2 TOWN CENTRE SETTING AND BUILT FORM

Gloucester's town centre is located at the eastern edge of the Barrington River floodplain. The precinct is orientated along a north-south axis, and the township's land form rises steeply from the floodplain. The effect provides a unique setting for the town centre, with a floodplain parkland edge along the precinct's western side, and steeply-rising residential areas framing the eastern edges of the town centre (refer Figure 6). Sweeping views to the Bucketts Ranges are afforded from the east-west streets that traverse the main north-south axis (Church Street, refer Figure 6).

The town centre is predominantly located along Church Street, formed by single and two-storey structures with extensive veranda edges. The visual effect is of a coherent and consistent built form, that clearly identifies and defines Gloucester's town centre.

The northern gateway to the town centre is strongly physically defined with a landscaped roundabout. The southern gateway is less well-defined, and is characterised by a transition from under-used land on Church Street (eastern side) to residential properties south of Hume Street. There is clearly potential to improve a physical gateway at Hume Street.

In summary, the town centre's physical presence and setting has provided a consistent and coherent built form, reinforced by intact heritage structures and streetscapes that line the main street and cross streets. The resultant effect is of a high-quality built environment and a memorable sense of place.

2.3 TOWN CENTRE ACTIVITIES

Gloucester's town centre is focused on a retail core area that extends from King Street north to Queen Street, or a distance of approximately 260 metres. The southern and northern edges of the core district are effectively marked by the town's two supermarkets, Foodworks at King Street and IGA Garners at Queen Street. The retail core area is the heart of the town centre. It contains the town's retail stores and services, banks and commercial establishments, and principal cafés.

As indicated above, the town centre is located on the eastern edge of the Barrington River floodplain. This provides an attractive park setting for the town centre; its entire western edge being flanked by floodplain, reserves and parklands.

Gloucester's town centre has several important supporting areas. These are:

- trades and business areas south and north of the town centre, and a small precinct on the edge of the floodplain west of the town centre;
- hospitality and business areas east of the retail core area, between Denison and Queen streets;
- professional areas, including a number of converted residential premises extending along King and Hume streets, the northern side of Queen Street, and Church Street north of Queen Street. This area also includes a motel and a community centre;
- parking areas provided by the street system (Church Street and the cross-streets of Queen, Denison, King and Hume streets), and extensive off-street parking areas located both East and West of Church Street.

2.4 ROLE AND FUNCTION

Gloucester's town centre is the central activities place for the township and Shire. It has a regional catchment area (RCA) that extends across the Shire to the City of Greater Taree and Great Lakes Shire on the coast. Approximately 85% of the town centre's trade is drawn from a regional catchment area that extends approximately 60 kilometres east to west, and 75 kilometres north to south (refer Figure 6).

The town centre is the retail, commercial and professional services centre for the township and Shire. A survey by the consultants in August 2005 found that the town centre had some 83 establishments, with approximately 21,000 m^2 gross leasable area (GLA), refer Table G). The activities pattern of the town centre was comprised as follows:

- The town centre is anchored by two supermarkets, with a total floorspace of approximately 2,350 m^2 GLA;
- There are four takeaway food establishments, and a further eight cafés, bars and restaurants, with approximately 2,560 m^2 GLA. Other retail food establishments provided some 600 m^2 GLA. In all, a total of 17 food, groceries and liquor retailing establishments provided some 5,510 m^2 GLA of occupied floorspace;

- Retail non-food establishments, including clothing and footwear stores and a range of regularly consumed household goods, including newsagents goods, pharmaceutical items and home wares stores provided some 22 establishments, with a total floor area of approximately 3,820 m^2 GLA;
- Bulky goods retailers, or stores retailing furniture, furnishings and whitegoods provided some four establishments, with a total floor area of approximately 3,220 m^2 GLA;
- In addition, the Gloucester town centre provided a number of retail services, including banks, dry cleaners, travel agents, real estate agents, hairdressers and other services. A total of 11 establishments existed in the town centre, with a floor area of approximately 2,150 m^2 GLA;
- The town centre provided a wide range of supporting commercial, professional and community services. A total of 25 establishments were identified, with a total floor area of approximately 5,200 m^2 GLA;
- Several trade services were also identified. These included motor vehicle retailing and servicing establishments. Some four establishments were identified, with a total floor area of approximately 1,870 m^2 GLA;
- No vacant floorspace was identified at the time of the Survey. This is rare by any standard. It certainly indicates that floorspace in the town centre was at a premium, and that there was a high level of demand and utilisation for retail and commercial floorspace;

In summary, the Gloucester town centre, with a total of 83 establishments and approximately 20,800 m^2 GLA, has a wide diversity of retail, commercial, professional and trade services. The total retail goods floorspace was approximately 11,550 m^2 GLA, with some 43 establishments, and the total shopfront activities (that is, including retail services) comprised some 54 establishments, with a total occupied floorspace of approximately 13,700 m^2 GLA.

Gloucester's town centre is the township and Shire's central place for retailing and a broad diversity of other activities. The In-Centre Survey prepared by the consultants, together with subsequent expenditure checks and modelling, found that:

- Some 78% of food, groceries and liquor expenditures by households resident in the Gloucester Shire is bound to the town centre;
- Some 70% of bulky goods expenditures by households resident in the Shire is bound to the town centre;
- Some 75% of expenditures on other household goods (including footwear, clothing, newsagents goods, pharmaceutical goods, photographic equipment, jewellery, home wares etc) made by households resident in the Shire is bound to the town centre.

In addition, the town centre drew 21% of retail sales from beyond Gloucester Shire. The net effect is that escape expenditures from the Shire (approximately $11.53 million at June 2005 prices) did not significantly exceed net inbound expenditures (from areas beyond the Shire). These amounted to approximately $9.90 million at June 2005 prices in 2004/05. As a consequence, it is estimated that the town centre has robust retail sales of approximately $46.2 million at June 2005 prices in 2004/05, a figure almost equal to the estimated current resident household expenditures for the Gloucester Shire (approximately $47.8 million at June 2005 prices in 2004/05, refer Table F.4).

In summary, the Gloucester town centre is clearly the central place for the township and Shire, and on available evidence and measures, performs a robust retail function. For a supermarket-based centre, it has an effective level of market share capture, and escape expenditures are reasonably balanced by inbound expenditures.

2.5 PATRONAGE BEHAVIOUR PATTERNS

The In-Centre Survey provided important information on patronage patterns to the town centre. It was found that some 73% of patrons visited the town centre daily or several times a week, and a further 11% visited the centre on a weekly basis. Thus, some 84% of patrons visited the centre on a weekly or more frequent basis. This indicates the high significance of the Gloucester town centre in the daily lives of local and regional visitors.

Some 15% of patrons were drawn from beyond the immediate region. Gloucester is clearly an important centre for tourists passing up Bucketts Way and Thunderbolts Way from Newcastle and Sydney, and from southeast Queensland and more distant locations.

The town centre was dominated by major retail attractors that drew high proportions of visitors on the day of survey. The most significant attractors were the two supermarkets (each drawing approximately 50% of respondents on the day of survey), followed by the newsagency, banks (generically) and post office. The library was identified as an important element in the town centre, drawing approximately 11% of respondents on the day of survey. The distribution of the major attractors reinforces movement patterns along the street and the street-based nature of the activity centre.

TABLE 2.1: MAJOR ATTRACTORS VISITED IN THE GLOUCESTER TOWN CENTRE (AUGUST 2005)

Major Retail Attractor	% of Respondents*
IGA-Garners	50.6
Foodworks	48.5
Newsagency	31.1
Bank/Building Society (collectively)	30.7
Post Office	28.6
Pharmacy	19.1
Cafés/Hotel (collectively)	18.3
Garners Home Hardware	19.1
Yates and Toohey Hardware	12.0
Library	11.2

*Most respondents visited several establishments in the one trip, so totals will exceed 100%.

The importance of the attractors identified by the in-centre survey is that there are more than ten facilities within a three block setting of the town centre that attract and generate relatively high proportions of visitors. These reinforce pedestrian flows along the street and are an essential element for the vitality of the town centre.

The survey also asked visitors about their mode of travel to the town centre. It was found that approximately 83% of visitors journeyed to the town centre by motor vehicle, either as car drivers (67.5%) or as car passengers (15.8%). About 16% of visitors walked to the town centre and the level of public transport access (essentially taxi in this instance) was less than 1%.

The clear implication is that private motor vehicle use is likely to remain the primary means of access to the town centre for the foreseeable future. The challenge for the planning of the Gloucester Town Centre is to provide attractive landscaped areas as multi-purpose spaces, including meeting the car parking needs of the town centre. This issue is discussed in Section 3. The in-centre survey also indicated that there is a notable level of walking trips to the town centre. A planning framework is proposed to provide additional opportunities for walking within and to the precinct (refer Section 3).

2.6 RETAIL AND COMMERCIAL FLOORSPACE REQUIREMENTS

The study provided a detailed assessment of retail and commercial floorspace requirements to meet the town centre's needs over the period 2005-2021. The following findings were observed:-

- The analysis of floorspace requirements was based on the residential development, household and population projections for the Shire prepared for the study. These results were discussed in Section 2.1. The findings indicated that Gloucester Shire is likely to undergo significant household and population growth over the period to 2021 and beyond. Table E.2 shows a summary of the results of the household and population projections. It can be seen that over the period June 2005-2021:
  - the Shire's resident population is projected to increase by 22% (from approximately 4,980 persons at June 2005 to approximately 6,080 persons by June 2021);
  - the Shire's resident households are projected to increase by 36% (from approximately 1,990 households at June 2005 to 2,700 households by June 2021);
- Resident household expenditures in Gloucester Shire were assessed at approximately $47.8 million for 2004/05 at June 2005 constant prices (refer Table F.3). These are projected to increase to $66.9 million by 2020/21 at June 2005 constant prices (refer Table F.3. These projections allow for the growth of the residential population as predicted and some real growth in retail goods demand (refer Tables E.2, F.2);

- Annual retail sales for the Gloucester Town Centre are currently estimated at approximately $46.2 million for 2004/05 at June 2005 constant prices (refer Table F.4). These are predicted to grow to approximately $68.7 million by 2020/21 at June 2005 constant prices (refer Table F.6);
- Currently (August 2005), the Gloucester Town Centre has approximately 20,770 m^2 gross leasable area (GLA) of retail commercial and services floorspace (refer Table G). This is comprised of some 13,700 m^2 GLA of retail goods and services floorspace (termed shopfront floorspace) and a further 7,070 m^2 GLA of commercial, professional, community and trade services floorspace
- By 2021 the Gloucester Town Centre's retail and services floorspace requirements are predicted to be approximately 26,750 m^2 GLA (refer table H.1), and this is likely to be comprised of approximately 17,690 m^2 GLA of shopfront floorspace and some 9,060 m^2 of commercial, professional, community and trade services floorspace;
- Over the period 2005-2021 the net additional floorspace requirements for the Gloucester Town Centre are therefore likely to be as follows:
  - a total net additional requirement of approximately 5,980 m^2 GLA is predicted for all retail, commercial and services floorspace;
  - this is likely to be comprised of an additional requirement of approximately 3,990 m^2 GLA for further shopfront floorspace development and a further 1,990 m^2 GLA for additional commercial, professional, community and trade services development.

In summary the study has identified the need for further retail, commercial and services development in the Gloucester Town Centre to meet additional needs over the period 2005-2021. In Section 3 a framework has been provided to address the longer term planning requirements of the town centre and, within this context, locations and a strategy for new development of the scale predicted above.

2.7 CAR PARKING

Need to allow for the King Street West Carpark. Contains about 51 spaces and had an occupancy of 9 car spaces. Add this to both demand and supply and subtract from additional

A survey of car parking supply and demand was undertaken in the town centre on Friday, 19 August 2005. The results of the survey are shown in Table H.3. The current car parking supply of the town centre was found to display the following characteristics:-

- the total on-street and off-street car parking supply was found to be 430 spaces;
- of this quantum, about 39% or 169 car spaces, are on-street car spaces;
- some 48% of the town centre's car parking spaces is concentrated in two off-street car parks; car park "N" on the western side of the centre, between Denison and Queen Streets, and car park "H" on the eastern side of the centre, between King and Denison Streets (refer Figure 3);

- the balance, approximately 13%, of car spaces was distributed in a number of small car parks (ie car parks "B, C, J, K & P", refer Figure 3 and Table H.3). These car parks have a total supply of 66 car spaces and an average supply per car park of approximately13 car spaces;

In summary, the car parking supply situation of the town centre is characterised by a number of small car parks. There are no regular, significant sized car parks with modern standard layout and design.

A car parking utilisation survey was undertaken on Friday, 19 August 2005. The results of the survey indicated patterns of demand as follows:-

- the overall level of utilisation of the car parking supply was 70% on the day of survey. On this basis, it is likely that average utilisation would exceed 80% in the pre-Christmas period;

- car parking utilisation patterns varied significantly throughout the centre. In general terms, the southern and eastern sections of the town centre had relatively low levels of car parking utilisation (less than 65% in Church Street, south of King Street, in King Street and in off-street car parking locations "B and C" (refer Figure 3). Moderate car parking levels (in the range 65-75% of capacity) were found in Hume Street and in car park location "H" (refer Figure 3);

  The highest levels of utilisation were found in the central, northern and western sections of the town centre. In particular, very high levels of utilisation (in excess of 85% of capacity) were found in Church Street, between King and Denison Streets, Denison Street east of Church Street and the off-street car park locations "N and P" on the western side of the town centre (refer Figure 3). High levels of car parking utilisation were found in Church Street between Denison and Queen Streets and in Park Street, north-west of Queen Street.

In summary, the current patterns of car parking utilisation reflected the peak activity areas in Church Street and the location of the largest, most proximate level off-street car park to the activity centre (ie location "N" on the western side of the centre, refer Figure 3).

An assessment was undertaken for the study on car parking supply requirements for the town centre for effective levels of functioning and to enable optimal levels of trade to continue to develop at the centre. Recommended car parking rates of provision are set out in Table H.1 (Refer column 4) based on the current experience in regional towns.

Optimal car parking requirements were then calculated for the existing town centre on the basis of the current occupied retail commercial and services floorspace in the precinct (refer Table H.1, columns 2 & 5). It was found that the town centre currently requires a total car parking supply of 700 spaces.

Further calculations were then made on the basis of projected retail, commercial and services floorspace requirements for the town centre. On this basis, it was found that the optimal car parking supply requirements by 2021 are approximately 890 car spaces (refer Table H.1, columns 3 & 6).

In summary, the current car parking supply of 430 spaces was found to be insufficient to meet the emerging and future needs of the town centre. The study has identified that there is a current deficiency of approximately 270 car spaces and this should be supplied by 2011 (refer Table H.2, Items 1-4). Taking account of projected retail commercial and services growth in the town centre, there is a longer term additional car parking supply requirement of approximately 190 car spaces, and this should be supplied over the period 2011-2021, refer Table H.2, Item 5.

2.8 INDUSTRIAL LAND REQUIREMENTS

2.8.1 Land Use Patterns

An analysis of the Gloucester industrial area was conducted as part of the study. An assessment was undertaken of patterns of development in the industrial area over the period July 1991-December 2004 with regard to the industry structure of emerging demands and with regard to historic and emerging patterns of land take-up over the 13.5-year period.

It was found that demands for industrial land in the estate have been generated by a diversity of uses encompassing:-

- motor vehicle maintenance and repair services
- mining vehicle manufacture
- farm machinery distribution
- building suppliers
- excavation equipment hire
- landscaping supplies
- specialist vehicle construction (horse floats)
- furniture manufacture
- manufacture of boats
- fish farming and processing.

2.8.2 Trends in Industrial Land Development (1991-2004)

The analysis of industrial land take-up over the period July 1991-December 2004 has revealed the following:-

- over the 13.5-year period the average annual take-up has been approximately 4,490m^2 site area per annum (refer Table J.2);
- however, take-up has varied significantly over the time period. In particular:-
  - during the period July 1991-June 1996, take-up averaged approximately 3,710 m^2 site area per annum;
  - in the following period, July 1996-June 2001, take-up averaged only approximately 470 m^2 site area per annum;
  - and in the most recent period, July 2001-December 2004, take-up has accelerated to approximately 11,320 m^2 site area per annum .

The analysis in Table J.2 clearly shows that there is no consistent historic trend of industrial land take-up in the Gloucester Estate during successive time periods since 1991. However, the following observations may be made:-

- over the entire period, industrial land take-up has averaged 4,490 m^2 site area per annum. Given that industrial land take-up has been significantly higher than this in the most recent 3.5 year period for which information is available (i.e. July 2001-December 2004) and given that levels of enquiries indicate that continuations of these demands are likely, then in the current circumstances, the lowest future rates of take-up are unlikely to be less than the long-term take-up rate (that is 4,490 m^2 site area per annum);
- the take-up rate observed over the most recent 8.5 year period (July 1996-December 2004) contains recent peak level activity and an extended period of subdued activity. It was found that the average for this period (4,940 m^2 site area per annum) exceeded the long term average. This average was adopted as a conservative estimate of the likely high value for take-up over the next decade;
- finally, the initial 5-year period for which take-up information is available (1 July 1991-30 June 1996) displayed a consistent level of activity with an absence of both extreme peaks and extended periods of non-activity. The average take-up for this period was 3,710 m^2 site area per annum. This was adopted as a likely minimum value in a projection range.

2.8.3 Estimates of Take-up Rate Requirements for the Future Development of Gloucester's Industrial Land (2005-2016-2031)

On the basis of the above findings and rationale, take-up rates of industrial land were established for the period 2005-2016. These are shown in Table J.3 and provide for a likely low rate of 3,710 m^2 site area per annum, a high rate of 4,940 m^2 site area per annum and a middle rate of 4,490 m^2 site area per annum.

In addition, longer term take-up rates were established for the period 2016-2031. Household projections undertaken for the study have indicated that, over the 15-year period 2001-2016, households are projected to increase by 30% and by 35.5% in the following 15-year period (2016-2031). The resultant differential ratio of the two growth rates is 1:1.183. This factor was taken to reflect the long-term differential rates for increased general housing development and also related industrial development. The ratio was applied to existing projections of industrial land take-up to establish longer term rates.

A range of 4,390 – 5,840 m^2 site area per annum was established as the likely take-up range for industrial land in the Gloucester township with a central value of 5,310 m^2 site area per annum during the period 2016-2031(refer Table J.3).

On the basis of this reasoning and the foregoing analyses, Table J.3 was prepared showing projected low, central and high industrial land take-up rates for the Gloucester industrial area.

2.8.4 Demand Supply Assessment for Industrial Land in the Gloucester Township (2005-2016-2031)

A detailed assessment has been undertaken of the projected demand for industrial land in the Gloucester industrial area and impacts on the supply of land over the periods 2005-2016-2031. A standard was adopted that allowed for a rolling 15-year supply reserve to be maintained at all times. The principal findings are set out in Table J.4. The key findings were:

- the existing supply of zoned and undeveloped industrial land in the Gloucester industrial area was assessed at 88,810 m^2 site area, based on cadastral information supplied by Council. (refer Table J.4, Item 1);
- the projected industrial land demand for the period 1 January 2005-30June 2016 is estimated at 51,640 m^2 site area, applying the central rate of take-up in Table J.4 (refer also to Table J.4, Item 2);
- a 15-year rolling land supply reserve to be retained at 30 June 2016 would require an additional 67,350 m^2 site area applying the central rate of take-up for the period (refer Table J.4 Item 3);
- therefore, the total industrial land demand for the Gloucester industrial area over the period 1 January 2005-30 June 2016, and allowing for a perpetual 15-year rolling land supply reserve to be maintained throughout this period, would generate a total demand of approximately 118,990 m^2 site area (refer Table J.4, Item 4);

- taking account of these demands, including the rolling reserve, and the available land supply (Table J.4, Item 1) the additional zoned and developed industrial land required by 30 June 2011 is 30, 180 m^2 site area (refer Table J.4, Item 5);
- the projected demand for industrial land over the period 1 July 2016-30June 2031 is for a further 79,650 m^2 site area (refer Table J.4, Item 6) ;
- a second demand supply balance at 1 July 2016 would result in an initial shortfall of 12,300 m^2 site area (ie taking account of the projected industrial demands for the forthcoming period 2016-2031 and balancing this against available supply on 1 July 2016, refer Table J.4, Item 7);
- reinstating the 15-year rolling land supply reserve from 1 July 2016 would require an additional 79,650 m^2 site area (refer Table J.4, Item 8);
- on this basis, a second tranche of additional zoned and serviced industrial land required by 30 June 2021 was projected to be approximately 91,950 m^2 site area (refer Table J.4, Item 9).

In conclusion, a total of 122,130 m^2 site area of additional zoned industrial land is required to meet projected demands over the period 1 January 2005-30 June 2031 and provide for a 15-year rolling supply reserve (refer Table J, Item 10); that is land over and above the existing zoned and vacant industrial land in the Gloucester industrial estate.

The existing and potentially available future industrial land south of Cemetery Road and east of Tate Street (currently zoned 7d) is approximately 172,700 m^2 site area (net of an allowance for future roads of 31,000 m^2 site area, refer Table J, Item 11).

Clearly, the potentially available supply greatly exceeds projected demands and reasonable allowance for a rolling reserve up to 2031. Advice will be sought from Council to further resolve this issue.

3 STRATEGIC PLANNING FRAMEWORK: GLOUCESTER TOWN CENTRE

3.1 FRAMEWORK STRUCTURE

The form of the recommended Strategic Planning Framework to guide the long-term planning and development of the Gloucester town centre is set out in Figure 1. It comprises:

- A vision statement for the future planning of the town centre;
- A context statement that sets out the planning problem and parameters for the town centre;
- The recommended strategy for the town centre, comprising:
  - Planning objectives for the town centre
  - Strategic principles for land use and development
  - Urban design principles
  - Key elements of the plan
- Recommended implementation strategy and framework for the town centre, comprising:
  - Zoning amendments to the LEP
  - Guidelines for preparing a Development Control Plan (DCP)
  - Implementation principles for development
  - Recommended processes for monitoring and review

3.2 VISION STATEMENT

Stakeholder workshops were conducted in Gloucester on 17 and 18 August 2005. These provided the basis to establish a vision for the town centre. The proposed vision statement is as follows:

Gloucester will continue to provide a unique village atmosphere and lifestyle; with a town centre that retains the district's heritage, style and ambience. It will promote a sustainable town that respects the area's natural values and beauty. The town will retain its strong sense of community and participation; and provide opportunities for vibrancy and inclusion in the town centre.

The vision statement is drawn from information contained in the workshops' proceedings, set out in Appendix (refer Section 5.2).

3.3 TOWN CENTRE CONTEXT STATEMENT

3.3.1 The Town Centre's Legacy and Attributes

Gloucester's town centre reflects the history of European settlement in the area. The town of Gloucester was laid out in 1855, and located on higher ground between the Avon and Gloucester rivers. The area's economy was based on agriculture; however, a significant population growth did not occur until the late 1870s, with the discovery of gold at Copeland. The township and town centre did not develop significantly until the area was subdivided for closer settlement at the turn of the 20^{th} century. Church Street's development dates from this period, and the area contains a number of intact examples of early 20^{th} century and inter-war architecture.

The town centre's built form is a consistent scale, single and two-storey streetscape. The relatively narrow main street further reinforces the town centre's clarity, defined by the streetscape in sharp relief to the suburban pattern that surrounds the precinct, and the floodplain of the Gloucester River with expansive views to the Bucketts beyond.

In summary, Gloucester's town centre is a reflection of the area's unique geography and the history of European settlement in the area. As a result, the town provides a legacy of a consistent built form with high aesthetic values, a clearly-defined village ambience and sense of place for future generations.

3.3.2 Managing Growth and Change

The purpose of the Development & Employment Land & Commercial/Retail Strategy is to provide a planning and design framework to manage the Gloucester town centre and industrial area. In this context, the framework for the town centre is directed to accommodate the precinct's future needs in a manner that respects its unique setting and heritage, and maintains the precinct's unity and integrity as a tightly-structured street-based activity centre.

3.3.3 Future Growth Requirements

The Gloucester township has entered a period of renascent change. This is projected to continue over the next 20 years and beyond, and long-term planning must make provision for a number of needs the town centre is likely to require. These include:-

- **New retail stores and services.** The town centre will require an additional 4,000m^2 GLA of shopfront floorspace for retail stores and services over the period 2005-2021;
- **New commercial, professional and community services floorspace**. The town centre will require an additional 2,000m^2 GLA for offices and community services to meet additional demands over the period 2005-2021. This quantum excludes any allowance for relocations of offices or community services that may occur during this period;

- **Car parking requirements.** Car parking for the town centre needs to be replanned and restructured. A total of 890 spaces are needed by 2021 to service the town centre. Taking account of existing car spaces, an additional 400 car spaces are required by 2021.

  If the entire town centre's car parking is provided on-grade and in a landscaped setting, the total land requirement (i.e. for existing and new car parking) is approximately 2.7 hectares.

- **Medium density residential development.** Areas around the town centre should be planned to accommodate medium density residential development. It is estimated that approximately 30% of the Shire's housing demand will be required as medium and higher density housing, and approximately half of this (ie 15%) will be required around the town centre. This housing will be required to meet the needs of an ageing population and other demographic changes including an increased preponderance of single-person households.

  On this basis, planning for the town centre and adjacent precincts must make provision for the longer term redevelopment of existing allotments to accommodate:-

  – approximately 90 higher density dwelling units over the period 2006-2021;

  – approximately 80 higher density dwelling units over the period 2021-2031.

- **Pedestrian access and open space requirements.** The town centre is fortuitously located on the eastern edge of the Gloucester River flood plain. The challenge of future planning will be to:-

  – provide for the extension of a high quality environmental and recreational area, between Boundary Street and the town centre;

  – provide for an extensive pedestrian and cycleway system that links the town centre to adjoining residential precincts and the Gloucester River parklands.

- **Hospitality activities.** Gloucester has a growing demand for tourism and related hospitality activities. Provision for future cafes, restaurants and other tourist services form part of the planning of the town centre's shopfront stores and services. In addition, locations should be provided for new residential hotel and motel facilities close to the town centre.

- **Civic facilities.** The creation of a diverse activities precinct in the Gloucester town centre would be greatly enhanced with the development of a multi-purpose civic centre to meet the growing social and cultural needs of the community. Future planning for the town centre should investigate potentials for an integrated civic centre (refer Section 3.4.5).

- **Trade services.** The town centre currently contains several establishments that provide trade services primarily focused on motor vehicle retailing, repairs and servicing. It is likely that there will be pressures for these to be consolidated, or to be relocated, given demands for additional retail stores and services in the town centre. The strategy for the town centre makes provision for the longer term relocation of existing trade services to a new location south of the CBD at Church and Philip Streets (refer Section 3.4.4).

- **Information centre.** An information centre for a town likely to become increasingly dependent on tourism is an essential element for Gloucester. The demands for an integrated tourism and information centre have been addressed as part of the planning of the town centre (refer Section 3.4.4).

3.4 RECOMMENDED STRATEGY FOR THE TOWN CENTRE

3.4.1 Planning Objectives

A strategy for the sustainable planning and management of the Gloucester town centre seeks to address the following objectives:

- To retain Church Street as the focal location for the town centre's retail activities and services, and for a diversity of commercial and community activities;
- To provide a safe, sheltered and high-quality pedestrian environment along Church Street in the town centre, that is accessible to the township's suburban areas and parklands of the Gloucester River floodplain;
- To provide an effective car parking system that meets the town centre's existing and longer-term requirements;
- To ensure there are sufficient sites and locations to meet the town centre's diversity of needs for the foreseeable future to 2021 and beyond;
- To provide an effective traffic circulation and vehicular access system that allows for north-south through traffic movements and maintains access to the town centre;
- To manage excessive through traffic on Church Street and enable the street to retain its prime role as the Gloucester town centre's heart;
- To ensure that future development in the town centre respects the precinct's scale and heritage values.

3.4.2 Strategic Principles for Land Use and Development

- **Pedestrian space and movement**
  The town centre's heart is a street-based pedestrian system founded on the following principles:
  - Street-edged pedestrian spaces fronted by active and transparent shopfronts and a slow-moving trafficable street that provides surveillance to the pedestrian environment;
  - The prime street-edged pedestrian space should be sheltered with a high level of surveillance and highly-illuminated at night;
  - Maximising pedestrian space on the street with areas for sitting, café dining (subject to realistic opportunities for design), as well as viewing stores and areas for walking with provision for safe crossing points at intersections and at mid-block locations;

  - Clear and visible linkages from the principal pedestrian network to the car parking areas and to a diversity of different types of open spaces for relaxation and recreation;
  - Creation of a pedestrian promenade system along the edges of the retail core district and the car parking areas, and integrated with new active shopfront and services environments to provide safe, attractive and highly active edges to these areas;
  - Creation of a high quality pedestrian and cycleway system linking the town centre to the adjacent residential precincts and the Gloucester River parklands.

- Retail environment and planning
  The principles recommended for the strategy are directed to ensure that Church Street remains the built form and activities heart of the Gloucester town centre through its role as Gloucester's retail core district. It is recommended that the town centre's retail environment be planned and designed consistent with the following principles:-
  - retention of the town centre's retail activities along Church Street, between Queen and Hume Streets;
  - emphasis on contiguous active frontages along Church Street with the avoidance of blank walls and inactive frontages, or obscured shop frontages (eg papered over shop windows, frosted shop windows, etc). Activities such as supermarkets or banks that require large frontages should either ensure that transparent frontages are maintained to the main shopping street, or that they are placed behind specialty stores with access via courts or arcades;
  - provision for, and facilitation of, the development of consistent and active shop frontages on the western and eastern edges of the existing and future retail core, along the parking and open space edges of the centre;
  - consistent veranda profiles, street posts and treatment of eaves;
  - provision for pedestrian courts and arcades as linking elements from Church Street to the car parking areas adjacent to the shopping street;
  - provision for new major retail attractors within the retail core district that maintain active street frontages, or are located behind specialty shops (that provide active street frontages);
  - provision for new retail stores and services to be added to the town centre through the extension and consolidation of the existing retail core in Church Street.

- **Traffic circulation**
  - ensure that the street function of the main shopping street (ie Church Street, between Queen and Hume Streets) is primarily focused on the street as a pedestrian focused shopping environment and maximises the available space for this purpose. Through traffic movement, not bound to the town centre, should be encouraged to use the Gloucester by-pass route proposed to be developed along Boundary and Philip Streets (refer Figure 2);
  - access to the car parking system should be via the local street system, Church Street and the ring road.
- **Car parking environment**
  - establish an integrated system of high quality landscaped car parks with access to the local street system, Church Street and the ring road;
  - provide for car circulation systems that are designed to optimise ease of access, circulation, and ensure pedestrian and driver safety. Ensure circulation continuity and visibility and minimise access routes within car parks;
  - provide landscaped environments that reinforce car parking circulation routes and car parking areas and provide shade and visual relief for the parking environments;
  - plan and facilitate active shopfront edges and pedestrian promenades and seating areas to face the car parking areas pedestrian on the western and eastern edges of the town centre's existing and future retail core district;
  - encourage retail, commercial and mixed use activities, integrated with pedestrian promenades, landscaped spaces and seating areas, to front on to the eastern edges of car parking areas;
  - ensure that existing and future car parking areas are well lit and monitored to facilitate evening use.
- **Parklands**

  A great and memorable feature of Gloucester is the backdrop of the Bucketts Ranges and the Gloucester River floodplain. The recommended strategy for the town centre is focused on ensuring that the parklands that border the precinct and form and edge to the township will remain a key environmental and recreational resource in perpetuity. Key principles for planning include the following:-

  - maintain and enhance the water courses of the Gloucester River and related channels as the primary defining elements in the planning and development of the parklands to the west of the town centre;
  - provide a defined pedestrian edge to the car parking system that will form the eastern boundary to the parklands;
  - ensure that a pedestrian access system is developed that provides a hierarchy of pedestrian pathways with linkages to the town centre and residential areas of the township;

- provide for safe pedestrian routes and crossing points across the Gloucester by-pass road (to be formed by Boundary and Philip Streets);
- identify opportunities for a diversity of leisure and recreation experiences to reflect the diverse needs of the community and visitors, having regard to the different needs of parkland visitors at different stages in the life cycle.

- Supporting Activities

  The town centre is required to accommodate a wide range of activities in addition to retail stores. In Gloucester, and most town centres, a number of retail services are inter-disbursed with retail stores. These are services or activities that are undertaken from a shopfront environment (eg hospitality services, such as cafes, restaurants and catering and a diversity of other services, including hairdressers and beauticians, banking services, travel agencies, dry cleaners, clothing repairs and business services such as photographic and photocopying services).

  There are a number of other activities that the town centre is also required to accommodate. These include:-

  - professional and commercial services. These include health services, financial and business services and a wide range of other professional and consulting services;
  - social and community services;
  - civic, arts and cultural services;
  - government agencies and administration;
  - recreation and entertainment.

  Planning for the town centre should make provision for the co-location of a diversity of these activities to be located in the mixed use/professional services area adjacent to the retail core district. The availability of these services close to the retail core district will optimise accessibility for the community and will add interest and vitality to the town centre.

3.4.3 Urban Design Principles

The strategy for the town centre is based on the following urban design principles:

- **Scale and Urban Form**
  The town centre's low scale, consistent urban form and use of natural materials are important characteristics that define the precinct and reinforce its sense of place. It is important that a Development Control Plan (DCP) be prepared for the town centre to ensure that future development is generally consistent with the town centre's established scale and form. This objective should be achieved notwithstanding ongoing and future needs for:
  - passive solar access in building design;
  - provision for solar heating and energy technology;
  - placement and scale of signage (refer below);
  - maintaining privacy between properties and in areas away from active edges.
- **Shopfront Environment**
  (refer Retail Environment and Planning, Section 3.4.2)
- **Mixed Use of Environment**
  There is a wide range of supporting activities that the town centre requires in addition to retail stores and services (refer Supporting Activities, Section 3.4.2). Provision for these activities has been made in a mixed-use precinct adjacent to the retail core district. Planning and design principles for the precinct are as follows:
  - the precinct's built form and scale should complement the retail core district. An upward gradation in scale may be achievable subject to visual impact assessments. Buildings in this precinct should not dominate the town centre or unduly impact on the retail core district's visual amenity;
  - new buildings and activities in the precinct should address a pedestrian promenade to form an edge of the proposed car parking areas on the retail core district's eastern side;
  - where possible, active ground floor frontages should face pedestrian promenades with upper-level offices and residential activities.
- **Pedestrian Promenade Areas**
  The edges of the retail core district, car parking areas, and the mixed-use precincts that are street-based or address the car parking areas should be framed by pedestrian promenades. A future DCP for the town centre should facilitate the following principles in relation to pedestrian promenade areas:
  - provision of areas for walking, with sufficient space for viewing displays, milling and entry to stores and services;
  - space for tree planting, landscaping and public seating;
  - space for placing kerbside cafés. These spaces should be located adjacent to existing and future restaurants and cafés, and be serviced by the kitchens of these facilities;

- provision for installing street art;
- provision for accent and general lighting designed to maintain these areas as safe, attractive and well-lit spaces.

▪ **Landscape**
Landscape and planning for the town centre should ensure that:

- themed planting reinforces and helps clarify the major precincts and elements of the town centre and adjoining areas;
- entry areas to the town centre are highlighted by applying special ornamental landscape elements, e.g. jacarandas, native palms;
- the key circulation routes to the town centre should be accented and distinguished by themed planting and distinctive lighting and urban design;
- the town centre's edges with adjoining residential, park and commercial precincts should be defined by applying distinctive landscape themes.

▪ **Signage**
A DCP for the town centre should provide guidelines for erecting and placing signage. In the retail core district, it should specify a 'placement zone' for signage that is consistent with the established building form in the precinct. Signage should not dominate the town centre; and should be consistent with the retail core district's established building style and scale.

3.4.4 The Plan's Key Elements

The Structure Plan Framework for the Gloucester town centre is shown in Figure 2. It comprises the following elements:

▪ **Retail Core District**
The retail core district forms part of the town centre's historic area, and is the precinct's focus and most active area. It extends along Church Street, from Queen to King Streets, and is framed by active shopfront edges protected by verandas where possible, with pedestrian space linkages east and west to the adjoining car parking system.

▪ **Parking Street/Pedestrian Spine**
The retail core district fronts Church Street. The prime purpose in planning and managing this street will be an emphasis on pedestrian safety and visibility, and on ensuring that heavy vehicles and through traffic are encouraged to use the bypass route where possible. The traffic role is for shopper and visitor access and parking, and should continue to be planned as a slow-movement environment.

▪ **Proposed Retail Core Extension Area**
The designated retail core extension area is an area along Church Street, between King and Hume Streets. The area is underdeveloped, and is best suited to provide redevelopment opportunities for new retail stores and services to adjoin the existing retail core area north of King Street.

Active edges, to be protected by verandas where possible, should be developed with new stores and services. Upper-level services and professional activities should be encouraged. In addition, provision should be made for new east-west pedestrian access ways, linking the retail core extension area to planned car parks, parklands and the adjoining residential precincts.

- Mixed Use/Professional Services Area
  A precinct extending east to Barrington Street from the proposed car parking areas and an area to the south-west of Hume and Church Streets are proposed to accommodate future professional, commercial and community services required for the town centre. In addition, this area will be suitable for tourism accommodation and higher-density residential accommodation.
  The precinct's interface with the car parking areas is to be planned as a pedestrian promenade with active ground floor tenancies (that is, a shopfront-type configuration of activities with cafés and a range of other services requiring high levels of public access). Upper floor levels could include commercial and professional offices, and residential and tourist accommodation.
  The mixed-use/professional services area would be eminently suitable for an integrated Civic Centre that, optimally, would be located adjoining the car parking areas and pedestrian promenade system.
  A Civic Centre in this location would provide high levels of convenience for visitors to the town centre and residents. Potential components of the Civic Centre are set out in Section 3.5.

- Car Parking Systems/Open Space Linkages
  Gloucester's town centre will retain dependency on the motor vehicle as the primary means of transport for the foreseeable future. The provision of attractive, landscaped car parking areas is an important design and planning component of the town centre's Structure Plan Framework. These are envisaged to be developed east and west of the existing retail core, and the proposed retail core extension area (refer Figure 2).
  A DCP for the town centre should specify:
  - guidelines for access and egress to the car parking areas;
  - principles for layout and landscaping of the car parks;
  - principles and layout requirements for the pedestrian promenades planned to border the car parks' eastern and western edges;
  - principles and layout requirements for new east-west pedestrian pathways to traverse the car parking areas and connect to the retail core district and extension area.

The principles and layout requirements and guidelines should encompass:

- requirements for disabled visitor parking and access;
- designated areas and access requirements for service vehicles;
- designated areas and screening for service yards;
- required lighting standards for the car parks and pedestrian pathways and promenade areas;
- areas for stationing shopping trolleys.

- **Parklands**
  One of Gloucester's most important resources is the parklands that adjoin the town centre. The Structure Plan Framework envisages high-quality public gardens to extend from the town centre's western edge to the Circle Boulevard (Bypass Road). A DCP for the town centre should be required to provide planning, design and development guidelines for the parklands, to encompass:

  - a native garden and wetlands area in the northern section of the parklands, on the banks of the Gloucester River;
  - a barbeque and public park area close to Denison Street;
  - retaining existing public facilities;
  - providing a high-quality shared pedestrian and cycle pathway extending the length of the parklands, with connections to the east-west pedestrian routes from the town centre and car parking areas;
  - investigations for a potential flood retention and ornamental pond in the vicinity of King and Hume Streets, east of the Circle Boulevard.

- **Circle Boulevard (Gloucester Bypass Road)**
  The proposed Circle Boulevard is an important element of the town centre's Structure Plan Framework. It is intended to provide an attractive landscaped bypass route for through-traffic, over-dimensioned vehicles and loads, and heavy vehicles. It is planned to run from Philip Street at the Church Street intersection to Park Street; with an at-grade intersection with Denison Street to facilitate access to the town centre by service vehicles, as well as access by visitors and residents.

  The DCP for the town centre should provide design and development guidelines for the Circle Boulevard to address the following issues:

  - cross-sectional details required for the proposed Boulevard, including landscaping, carriageway and edge-of-carriageway requirements;
  - a required lighting standard for the Boulevard and intersection areas;
  - signage requirements;
  - turning circle requirements to facilitate access by over-dimensioned vehicles and loads and heavy vehicles;
  - safe pedestrian crossing requirements linking with major pedestrian routes.

- **Commercial Node**
  The Structure Plan Framework for the town centre provides for a commercial node at the intersection of Philip and Church Streets. The prime purpose of the node is threefold:
  - to serve as a major southern entry point to the town centre and Circle Boulevard;
  - to accommodate a high-quality tourist information centre and service centre;
  - to accommodate trades, motor vehicle repair and retail activities, and highway display activities that are not likely to be able to be accommodated in the town centre.

  The DCP for the town centre should provide guidelines for planning and developing each of the above elements.

- **Residential Development**
  The Structure Plan Framework for the town centre provides two commercial edge lines that indicate the intended limit of commercial development in the town centre and the commercial node.
  It is important to note that residential development will not be prohibited in the town centre (that is, the area within the town centre commercial edge line); and indeed, upper-level residential activities should be encouraged and facilitated within the mixed-use/professional services area. However, the primary use and intent of the town centre commercial node precincts is to accommodate retail, commercial, professional and community services, entertainment and leisure services; and residential accommodation will need to have regard to the area's primary purpose.
  Areas have been identified within the precincts adjoining the town centre for higher-density residential development. It is intended that these areas will provide a wider range of housing choice for the Gloucester township, and will consolidate the residential population within walking distance of the town centre.

3.4.5 Implementation

This section presents implementation recommendations for the Gloucester town centre. Recommendations for the industrial area are contained in Section 4.

- **Recommended Zoning Amendments to the Gloucester Local Environmental Plan 2000**
  It is recommended that the Gloucester LEP (2000, as updated 28 February 2005) be amended in relation to the extent and boundaries of the 3(a) General Business Zone, to reflect the town centre's intended boundaries. The intended extent of commercial land development is shown in Figure 2, represented by the commercial edge line.
  It is recommended that the 3(a) General Business Zone be adjusted from the current boundaries indicated in Figure 4, to the revised boundaries indicated in Figure 9. In general terms, most of the existing zoned area will remain unaltered under this recommendation. The notable changes to the zone boundary will result in a reduction of the 3(a) General Business Zone as follows:

– adjusting the current Zone boundary to the south side of Queen Street, east of Church Street;

– removing the Zone land east of Barrington Street;

– withdrawing the Zone land south of Hume Street's north side;

– withdrawing the Zone on the west side of Church Street, between the Commercial Node precinct and the town centre precinct;

It is further recommended that an overlay be placed over designated areas of the 2(a) Residential Zone to define higher density residential development areas. The recommended extent of the overlay areas is shown in Figure 9.

It is recommended that the 6(a) Open Space Zone be extended south, as shown in Figure 9, to align with the recommended 3(a) General Business Zone at the town centre's western boundary. The purpose of the proposed Zone extension is twofold:

– to facilitate the comprehensive park, recreational and environmental planning required for the parkland areas, consistent with the Structure Plan Framework (refer Figure 2);

– to facilitate the planning of landscaped and car parking areas that will form a buffer between the town centre and the parkland areas.

- **Recommended Development Control Plan (DCP) for the Town Centre**
  It is recommended that a DCP be prepared to provide a design and development framework for the future planning and management of Gloucester's town centre and adjoining precincts.
  It is recommended that the DCP provide design and development guidelines and a Phasing Plan to implement the Gloucester Town Centre Structure Plan Framework, as set out in Figure 2, and the Structure Plan's principles and objectives, as set out in Section 3.

- **Recommended Civic Centre Feasibility Project**
  It is recommended that Council give consideration to conducting a Civic Centre Feasibility Project to investigate the costs, benefits and practicality of relocating Council's existing administrative services to a new facility in the town centre. This facility could also serve as an integrated administrative, civic, cultural and arts centre to meet the Shire's current, emerging and future needs.
  It is recommended that the Terms of Reference for the Feasibility Study encompass the following issues:

– the range of administrative, civic, cultural and arts facilities that the Shire and surrounding districts is likely to require to meet emerging and future needs;

– prioritising needs as perceived by the community and reflecting projected demographic and social changes;

– costs of providing future facilities and services to meet these needs, including costs to upgrade the existing administrative offices, and an assessment of the effectiveness that any potential upgrade could deliver;

– capital and operational costs for a new facility in the town centre that could be implemented in stages as an integrated Civic Centre;

– comparative analysis if the proposed Civic Centre is developed in partnership with a private sector company or consortium, on the basis of a long-term lease and transfer scheme.

There are several important benefits that an integrated Civic Centre in the town centre would achieve. These include:

– minimising management and service costs by co-locating services;

– maximising convenience to residents and visitors by co-locating services at the Shire's most accessible precinct (the town centre);

– ensuring optimal use of car parking areas through the shared use of Civic Centre facilities that would generate demand during work and evening hours;

– further benefits to the town centre's trade and prosperity from business generated by on-site Civic Centre employees;

– improvements to the town centre's range of services by developing the Civic Centre in the precinct, and providing a new attractor for the central area.

4 INDUSTRIAL LAND PROVISION AND PLANNING

4.1 CONTEXT

The township's industrial land requirements are currently accommodated in the estate located in the 4(a) Industrial Zone, in the vicinity of Cemetery Road and Tate Street. The review undertaken for this Study assessed the current pattern of industrial land use, existing stocks and future land requirements. It also assessed the extent to which future land requirements could be accommodated within or adjoining the existing zoned area. The analysis indicated that demands for the foreseeable future (2005 – 2031 and beyond) can be accommodated in the local precinct immediately adjoining the existing zoned area. The recommendations and planning guidelines are designed to achieve:

- the maintenance of effective land stocks to avoid land shortages in the foreseeable future;
- a range of site sizes to ensure that the full range of potential demands can be accommodated;
- flexibility and sufficient provision for environmental areas adjoining and/or traversing the industrial estate;
- staged implementation of the estate.

4.2 VISION STATEMENT

A vision statement has been prepared to reflect community concerns and stakeholder aspirations for a high-quality industrial estate that meets the Shire's current, emerging and future needs.

Gloucester's industrial estate will continue to provide a stock of zoned and serviced industrial land, and a wide range of sites to meet current and future demands in an attractive, accessible and high-quality environment.

4.3 LAND PROVISION REQUIREMENTS

It is recommended that Council make provision for the future zoning, development and release of industrial land to meet the township's emerging and future requirements for the period 2005 – 2031 and beyond. The industrial land provision requirements that have been identified (refer Section 2.8 and Table Set J) are as follows:

- approximately 30,180 m^2 net site area of roadways and open space areas is required to be zoned 4(a) Industrial Zone to meet projected demands to 30 June 2016, and provide for a 15-year rolling reserve;
- an additional zoned area of approximately 91,950 m^2 net site area is required to be zoned 4(a) Industrial Zone to meet projected demands over the period 2016 – 2031;
- therefore, the total additional zoned land required to meet projected demands, 1 January 2005 - 30 June 2031, and allowing for a 15-year perpetual rolling reserve is 122,130 m^2 site area, net of roadways and open space.

4.4 RECOMMENDED INDUSTRIAL LAND INVESTIGATION STUDY

It is recommended that the land adjoining the existing Gloucester industrial area, located to the south of Cemetery Road, and east of Tate Street, be investigated for future industrial development. The land is currently zoned 7(d) Environment Protection Scenic, and contains extensive pondage and treed areas in its western section.

It is recommended that the Industrial Land Investigation Study be required to address the following objectives:-

- the suitability and feasibility of developing the central and eastern sections of the land south of Cemetery Road as an industrial estate to meet Gloucester's medium and long-term industrial land requirements;
- subject to the above, provision of a structure plan and development plan to allow for the staged development of the land for industrial purposes, consistent with the recommended land development guidelines.
- retention of the western section of the subject land south of Cemetery Road as open space to retain the existing landscape, flora values and pondage system (refer Figure 10);
- retention of the existing pondage and drainage system in the central section of the subject land (refer Figure 10);
- preparation of a staging and infrastructure contributions plan to provide for the effective implementation of industrial land development and required infrastructure and servicing on the subject sites;
- preparation of required zoning amendments to the Gloucester Local Environmental Plan 2,000 (as updated 28 February 2005) in relation to the extent and boundaries of the 4(a) Industrial Zone.

4.5 RECOMMENDED MONITORING REQUIREMENTS

It is recommended that Council establish and maintain an Industrial Land Monitoring System to comprise:-

- an annual inventory of industrial land use in the Gloucester industrial area with regard to:-
  - stock of industrial zoned land by land development status (that is, whether the land is sub-divided and available for development, and developed/or vacant);
  - land use status and tenancy type;
  - employment by tenancy type.
- changes in the status of industrial land and industrial occupancies over the preceding year;
- development applications for new industrial development, classified by stage of implementation;

It is likely that the most effective input for the Industrial Land Monitoring System would be the use of a questionnaire that accompanies the annual rate notices.

An Industrial Land Monitoring System will provide ongoing intelligence to Council in relation to changing patterns of industrial land demand and assist in the implementation of future land industrial zoning, development and releases.

4.6 INDUSTRIAL LAND USE POLICY

It is recommended that Council develop a policy statement in relation to the use of land in the existing Gloucester industrial estate, particularly in relation to the development of residential dwellings in the estate. It is recommended that future residential dwellings be prohibited in the estate. In the context of Gloucester's industrial estate, there is no apparent need for residential dwellings within the estate. The provision of these dwellings is not a suitable environment for families and they may compromise future industrial development and planning.

4.7 RECOMMENDED LAND DEVELOPMENT GUIDELINES

It is recommended that investigation and planning for future industrial land development in the area south of Cemetery Road be required to assess the subject land in terms of the eight criteria set out in the Local Government Act 1993 for preparation of State of the Environment reports. The criteria are:-

- land;
- air;
- water;
- biodiversity;
- waste;

- noise;
- aboriginal heritage;
- European heritage.

It is further recommended that detailed planning of the subject land, south of Cemetery Road, be required to consider the following criteria:-

- **site drainage and water quality**, including maintenance of water quality and retention of the existing pondage system;
- **biodiversity and bushland values.** In the context of the subject land, effective provision should be made to ensure the protection of identified native species and to maintain significant bushland values through the identification and retention of key areas and corridors;
- **landscape values and amenity**. Identify and retain where possible, areas of significant, natural and cultural landscape value. Structure and development planning should include provision for extensive landscaping, establishment of tree reserves and green corridors through the subject land;
- **diversity of site sizes**. Structure and development planning should ensure that there is a sufficient diversity of site sizes to cater for the full range of potential development applications;
- **roads, access and parking**. Planning must take account of vehicles likely to require access to the estate, including turning circles, off-site and on-site parking requirements;
- **signage**. Planning must make provision for an integrated system of street and tenancy signage;
- **lighting and security**. Planning must provide an effective system for street and site lighting and for the maintenance of security in the estate.
- **staging of development.** Planning must ensure that the subject land will be developed in a co-ordinated and staged process. The objective is to ensure cost effective provision of servicing and infrastructure, avoid piecemeal development and to maintain the amenity of both newly developing industrial areas and retained non-industrial areas.

Appendix A. Figures 1-10

PREPARED BY: RATIO CONSULTANTS
PREPARED FOR: GLOUCESTER SHIRE COUNCIL
DECEMBER 2005

Vision Statement

↓

Context Statement

↓

Strategic Principles

↓

Design Principles

↓

Elements of the Plan

↓

Implementation

- Zoning Amendments
- DCP
- Development
- Minoring & Review

DEVELOPMENT EMPLOYMENT LAND & COMMERCIAL/RETAIL STRATEGY: BUSINESS STUDY

GLOUCESTER TOWN CENTRE: DRAFT STRUCTURE PLAN FRAMEWORK

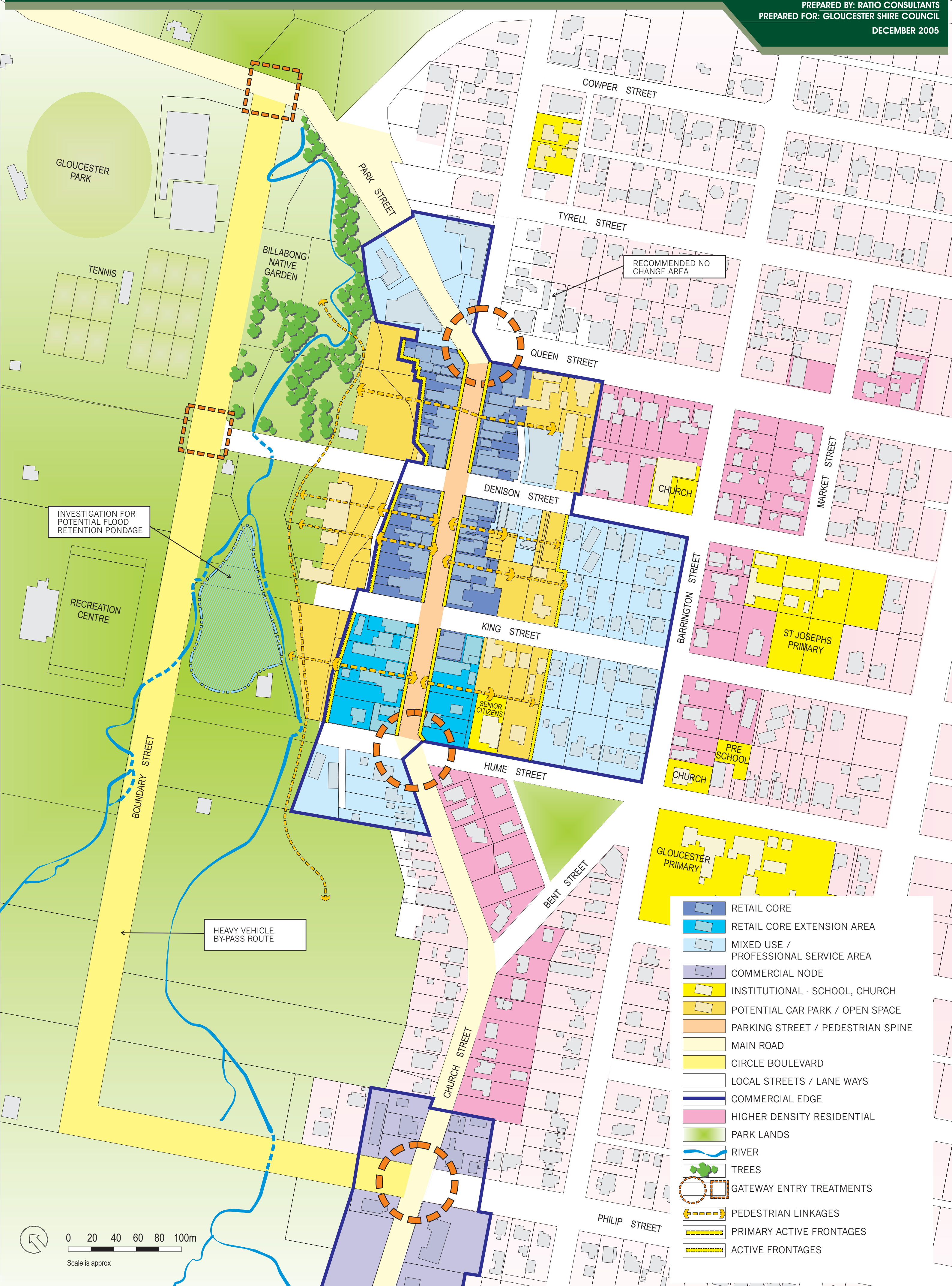
FIGURE 2

PROJECT: 6633

PREPARED BY: RATIO CONSULTANTS

PREPARED FOR: GLOUCESTER SHIRE COUNCIL

DECEMBER 2005



DEVELOPMENT EMPLOYMENT LAND & COMMERCIAL/RETAIL STRATEGY: BUSINESS STUDY

CAR PARKING SURVEY / FRIDAY 19th AUGUST 2005 - DISTRIBUTION OF CAR PARKING DEMANDS

FIGURE 3

PROJECT: 6633

PREPARED BY: RATIO CONSULTANTS

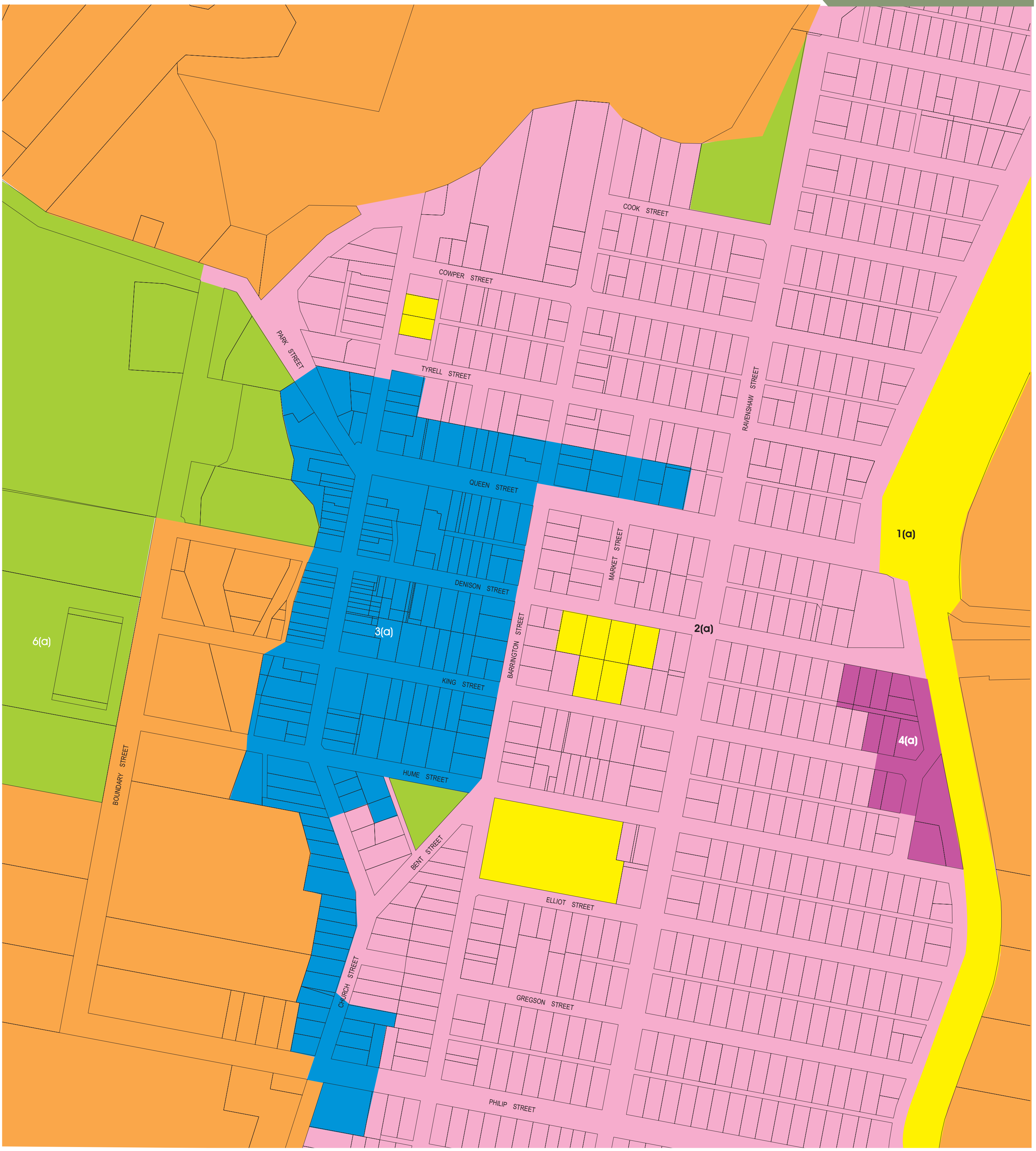
PREPARED FOR: GLOUCESTER SHIRE COUNCIL

DECEMBER 2005

DEVELOPMENT EMPLOYMENT LAND & COMMERCIAL/RETAIL STRATEGY: BUSINESS STUDY
GLOUCESTER SHIRE LEP: EXISTING ZONES IN THE TOWN CENTRE & SURROUNDS

FIGURE 4
PROJECT: 6633

PREPARED BY: RATIO CONSULTANTS
PREPARED FOR: GLOUCESTER SHIRE COUNCIL
DECEMBER 2005



COMMERCIAL
RESIDENTIAL
INDUSTRIAL
OPEN SPACE
RECREATION
ENVIRONMENTAL

0 20 60 100m
Scale is approx

CATCHMENT PLAN

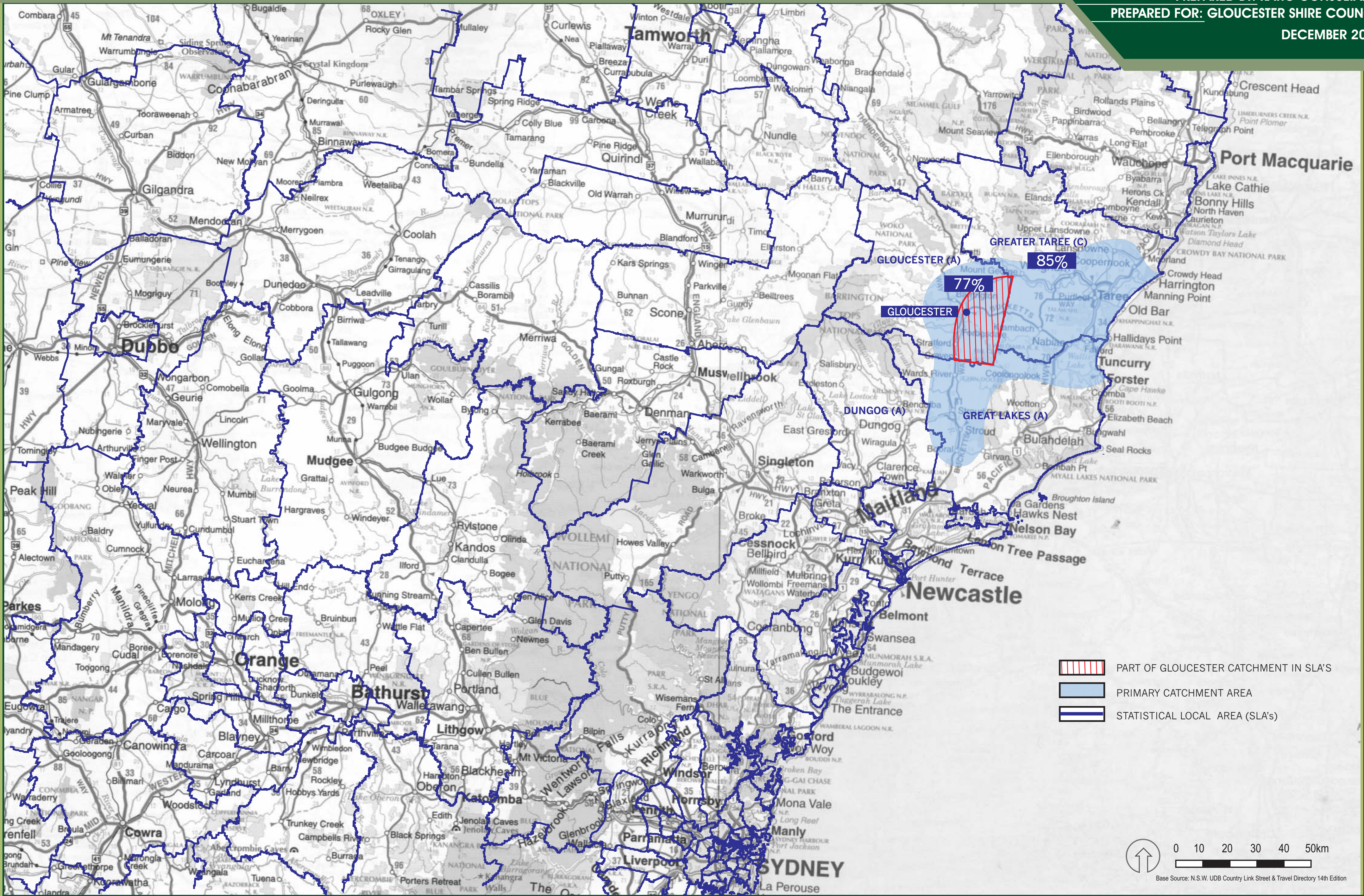
FIGURE 5

PROJECT: 6633

PREPARED BY: RATIO CONSULTANTS

PREPARED FOR: GLOUCESTER SHIRE COUNCIL

DECEMBER 2005



DEVELOPMENT EMPLOYMENT LAND & COMMERCIAL/RETAIL STRATEGY: BUSINESS STUDY

GLOUCESTER TOWN CENTRE

FIGURE 6

PROJECT: 6633

PREPARED BY: RATIO CONSULTANTS

PREPARED FOR: GLOUCESTER SHIRE COUNCIL

DECEMBER 2005

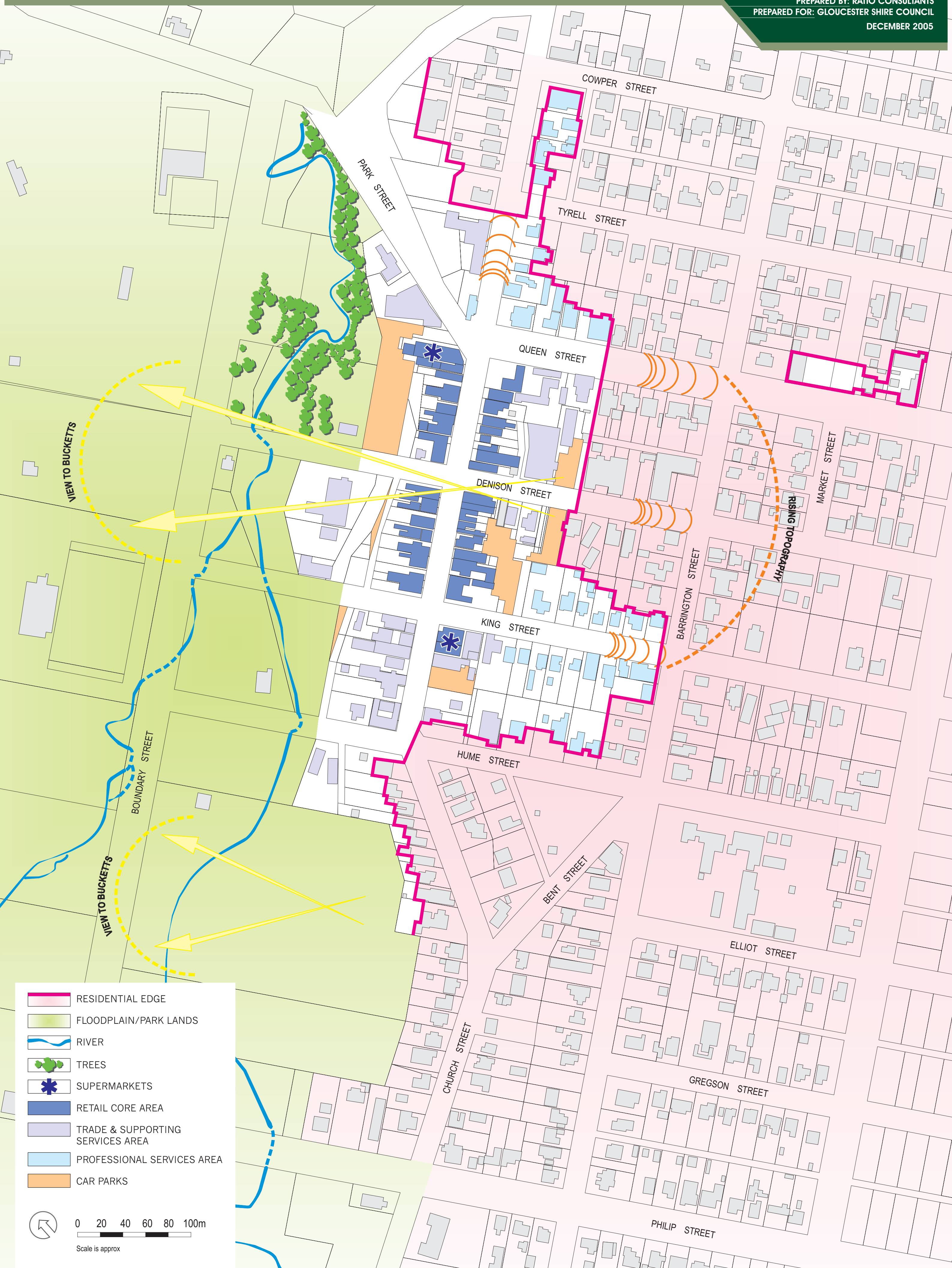
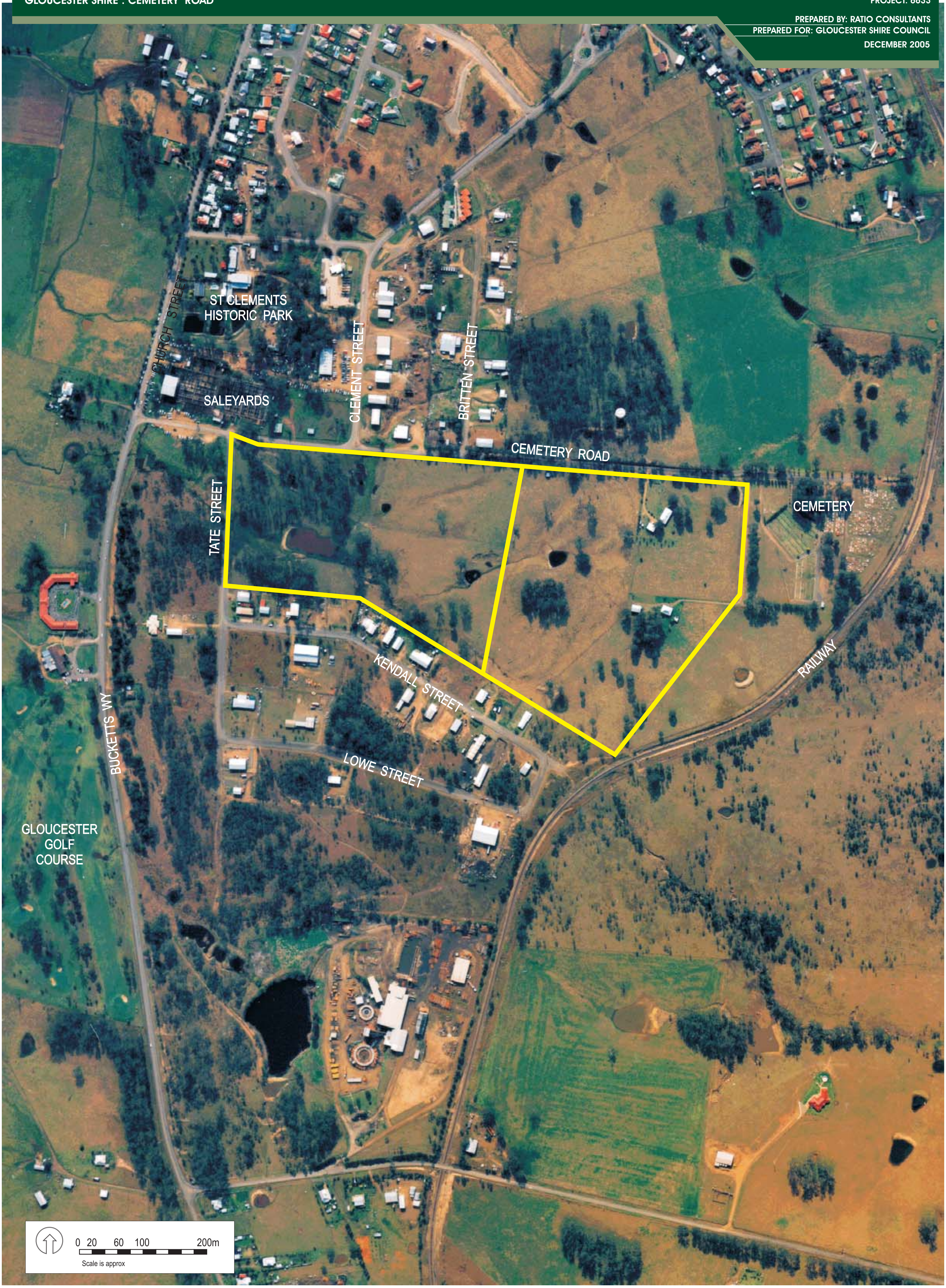
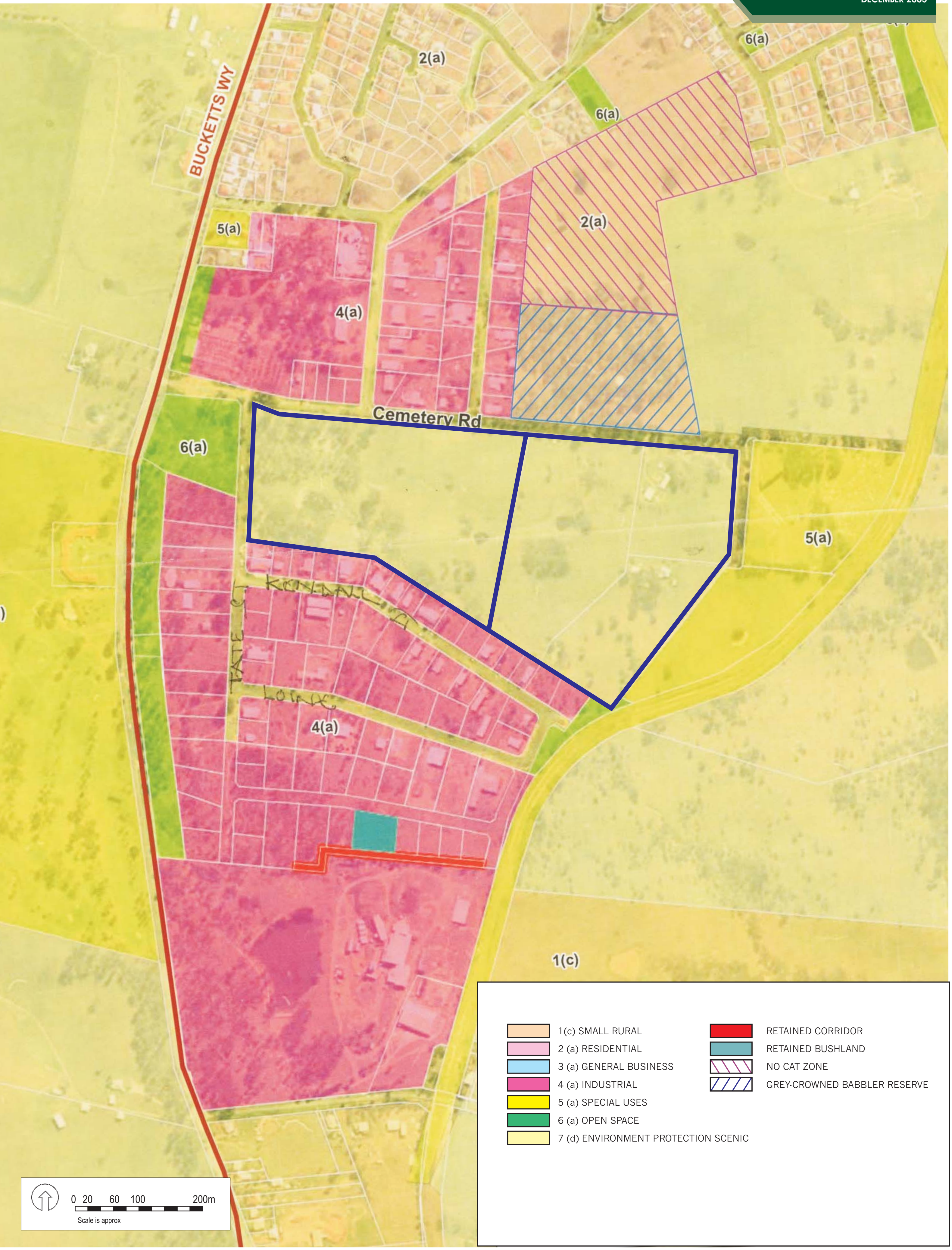


FIGURE 7

PROJECT: 6633

PREPARED BY: RATIO CONSULTANTS
PREPARED FOR: GLOUCESTER SHIRE COUNCIL
DECEMBER 2005




BUCKETTS WY
2(a)
6(a)
6(a)
2(a)
5(a)
4(a)
Cemetery Rd
6(a)
5(a)
KENDALL
TATE
LORNE
4(a)
1(c)
1(c) SMALL RURAL
2 (a) RESIDENTIAL
3 (a) GENERAL BUSINESS
4 (a) INDUSTRIAL
5 (a) SPECIAL USES
6 (a) OPEN SPACE
7 (d) ENVIRONMENT PROTECTION SCENIC
RETAINED CORRIDOR
RETAINED BUSHLAND
NO CAT ZONE
GREY-CROWNED BABBLER RESERVE
0 20 60 100 200m
Scale is approx

DEVELOPMENT EMPLOYMENT LAND & COMMERCIAL/RETAIL STRATEGY: BUSINESS STUDY

GLOUCESTER SHIRE LEP: PROPOSED ZONING CHANGES IN THE TOWN CENTRE & SURROUNDS

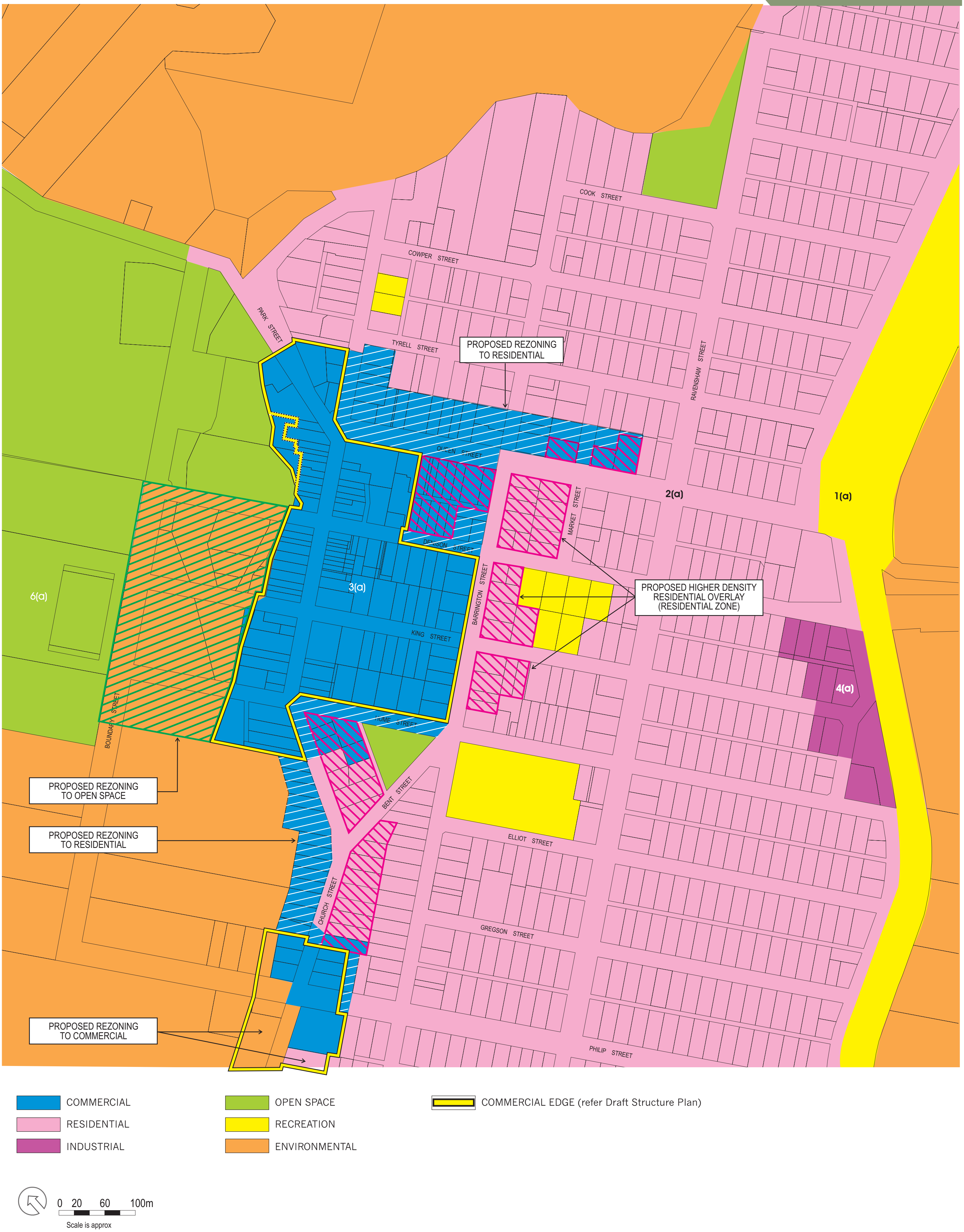
FIGURE 9

PROJECT: 6633

PREPARED BY: RATIO CONSULTANTS

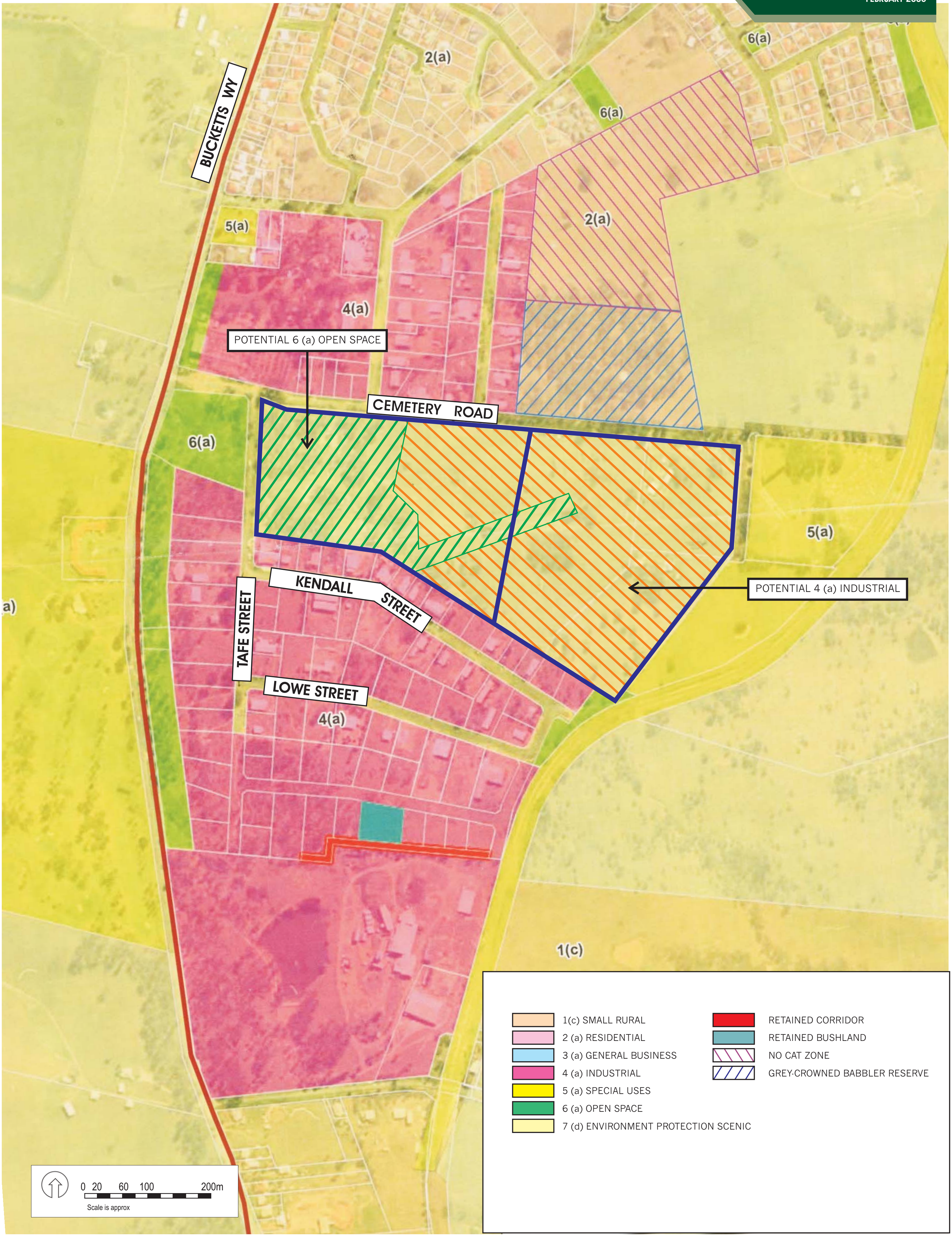
PREPARED FOR: GLOUCESTER SHIRE COUNCIL

FEBRUARY 2006



GLOUCESTER SHIRE : CEMETERY ROAD - PROPOSED ZONING CHANGES

PROJECT: 6633
PREPARED BY: RATIO CONSULTANTS
PREPARED FOR: GLOUCESTER SHIRE COUNCIL
FEBRUARY 2006



Appendix B. Tables Set A-K

Table Set A

Historic Dwelling Stock, Households, Estimated Resident Population (ERP); and Age Structure (1991 – 2001)

Table A.1

Gloucester SLA, NSW

Historic Population and Housing Statistics (1991 - 2001)

Source: ABS, *Census of Population and Housing* , 2001 (Time Series); ABS, *Regional Population Growth,* Australia & NZ, Cat. No. 3218.0

Measure	Census Year		
	1991	1996	2001
Occupied Dwellings (No.)	1,718	1,823	1,879
Total Dwelling Stock (No.)	1,974	2,140	2,273
% Total Dwelling Stock Occupied	87.0%	85.2%	82.7%
Resident Population (No.)	4,644	4,806	4,681
ERP (at 30 June) (No.)	4,777	4,962	4,840
Yield Rate (persons/ occupied dwelling) *	2.781	2.722	2.576

* Based on ERP values.

H:\Projects\6000\6633 Gloucester Retail Study\Data\ABS\[6633 051019 Dwellings and Population.xls]Historic

Table A.2

Gloucester SLA, NSW

Historic Trends in Age Structure (1991 - 2001)

Source: ABS, Census of Population and Housing, 2001 (Time Series)

Age Group		Gloucester SLA *		
		1991 No.	1996 No.	2001 No.
Infants	0-4	352	361	239
Children	5-14	752	733	746
Youth	15-24	512	485	426
Young Adults	25-39	878	899	744
Middle Aged	40-59	1,174	1,231	1,325
Elderly Citizens	60+	978	1,096	1,203
Total		4,646	4,805	4,683

* Excludes overseas visitors.

Table Set B

Dwelling Unit Approvals
(1991/92 – 2030/31)

Table B.1
Gloucester SLA, NSW
Trends in Housing Approvals (1991/92 - 2005/06 - 2030/31)
Source: ABS, Building Approvals, Cat. No. 8731.0

Period	Gloucester SLA
	No. New Houses
1991/92	35
1992/93	32
1993/94	27
1994/95	30
1995/96	21
Average 1991/92 - 1995/96	29
1996/97	24
1997/98	37
1998/99	29
1999/2000	31
2000/01	27
Average 1996/97 - 2000/01	30
2001/02	24
2002/03	28
2003/04	29
2004/05	34
2005/06	44
Average 2001/02 - 2005/06	32

Table B.2
Gloucester SLA, NSW
Projected Dwelling Unit Approvals Trends (2001/02 - 2030/31)

Period	Average Approvals	
	Per Annum	Per 5 Year Period
2001/02 - 2005/06	32	159
2006/07 - 2010/11	35	175
2011/12 - 2015/16	40	200
2016/17 - 2020/21	45	225
2021/22 - 2025/26	50	250
2026/27 - 2030/31	55	275

Table C

Historic Analysis of the Relationship Between Net Changes in Total Dwelling Stock and Totals of Dwelling Unit Approvals
(1991–2001 / 1991–1996 / 1996–2001)

Table C

Gloucester SLA, NSW

Analysis of Net Changes in Dwelling Stock and Dwelling Unit Approvals (1991 - 2001)

Source: ABS, *Census of Population and Housing* , 2001 (Time Series); ABS, *Building Approvals* , Cat. No. 8731.0

Period	Census Year	Total Dwelling Stock (TDS)	Net Change in TDS	Total Dwelling Unit Approvals (DUA)	Net Proportion of DUA Resulting in Additions to TDS
1991 - 2001	1991	1,974	299	293	102.0%
	2001	2,273			
1991 - 1996	1991	1,974	166	145	114.5%
	1996	2,140			
1996 - 2001	1996	2,140	133	148	89.9%
	2001	2,273			

H:\Projects\6000\6633 Gloucester Retail Study\Data\ABS\[6633 051019 Dwellings and Population.xls]DUA&TDS

Table D

Historic Analysis of ERP-Based Yield Rates
(1991 – 2001)

Table D

Gloucester SLA, NSW

Historic Analysis of ERP-Based Yield Rates (1991 - 2001)

Source: ABS, *Census of Population and Housing* , 2001 (Time Series); ABS, *Regional Population Growth* , Cat. No. 3218.0

Period	Census Year	ERP at 30 June	Occupied Dwellings	Yield Rate	
		No. Persons	No.	Persons/ Occupied Dwelling	Ratio of Period 1 to Period 2
1991 - 2001	1991	4,777	1,718	2.781	92.6%
	2001	4,840	1,879	2.576	
1991 - 1996	1991	4,777	1,718	2.781	97.9%
	1996	4,962	1,823	2.722	
1996 - 2001	1996	4,962	1,823	2.722	102.2%
	2001	4,777	1,718	2.781	

H:\Projects\6000\6633 Gloucester Retail Study\Data\ABS\[6633 051019 Dwellings and Population.xls]YieldRates

Table Set E

Projections of Total Dwelling Stock, Households, Yield Rates (ERP-based) and Resident Population (2001 – 2031)

Table E.1
Gloucester SLA
Projected Dwelling Unit Approvals and Total Dwelling Stock (2001 - 2031)

Total Dwelling Stock (TDS) 2001 No. Dwellings	Dwelling Unit Approvals (D.U.A.) 2001-2006 No. Dwellings	Estimated Total Dwelling Stock 2006 No. Dwellings	Projected Dwelling Unit Approvals 2006-2011	Estimated Total Dwelling Stock (2011) No. Dwellings	Projected Dwelling Unit Approvals 2011-2016	Estimated Total Dwelling Stock (2016) No. Dwellings	Projected Dwelling Unit Approvals 2016-2021	Estimated Total Dwelling Stock (2021) No. Dwellings	Projected Dwelling Unit Approvals 2021-2026	Estimated Total Dwelling Stock (2026) No. Dwellings	Projected Dwelling Unit Approvals 2026-2031	Estimated Total Dwelling Stock (2031) No. Dwellings
2,273	159	2,432	175	2,607	200	2,807	225	3,032	250	3,282	275	3,557

H:\Projects\6000\6633 Gloucester Retail Study\Data\ABS\[6633 051019 Dwellings and Population.xls]TDSProjections

Table E.2
Gloucester SLA
Projected Total Dwelling Stock, Households and Resident Population (2001 - 2031)

Year ended 30 June	Total Dwelling Stock	Occupied Dwellings		Yield Rate (Persons/ Occupied Dwelling)	Estimated Resident Population * (ERP)
		% Total Dwelling Stock	No. Households		No. persons
2001	2,273	82.7	1,879	2.576	4,840
2006	2,432	83.0	2,019	2.486	5,020
2011	2,607	85.0	2,216	2.396	5,310
2016	2,807	87.0	2,442	2.324	5,680
2021	3,032	89.0	2,698	2.252	6,080
2026	3,282	91.0	2,987	2.196	6,560
2031	3,557	93.0	3,308	2.139	7,080

* Rounded to the nearest 10 units

H:\Projects\6000\6633 Gloucester Retail Study\Data\ABS\[6633 051019 Dwellings and Population.xls]SummaryProjections

Table E.3
Gloucester SLA
Comparison of Population Projections

Reference	Estimated Resident Population (No. Persons)						
	2001	2006	2011	2016	2021	2026	2031
DIPNR *	4,930	4,980	4,980	4,990	5,010	5,040	5,050
Ratio Consultants Pty Ltd (October 2005)	4,840	5,020	5,310	5,680	6,080	6,560	7,080

* Department of Infrastructure, Planning and Natural Resources (New South Wales Statistical Local Area Population Projections 2001-2031, Transport and Population Data Centre, 2004)

H:\Projects\6000\6633 Gloucester Retail Study\Data\ABS\[6633 051019 Dwellings and Population.xls]DIPNR&Ratio

Table Set F

Retail Expenditure Profiles
(At June 2005 Constant Prices)

Table F.1
Gloucester SLA, NSW
Per Capita Retail Expenditures per Annum (2003/04 prices)
Source: Marketinfo 2004.

Major Commodity Group	Personal Expenditure per Annum ($)
Food, groceries and liqour	5,421.0
Bulky goods	1,609.1
Other household goods	2,091.5
Total Retail Goods	9,121.6

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051125 GloucesterSLA_RetailExp.xls]GloucesterSLA

Table F.2
Gloucester SLA, NSW
Projected Per Capita Retail Expenditures
Prepared by Ratio Consultants. Based on Marketinfo 2004, Personal Expenditure per Annum 2003/04 prices, 2004.

Major Commodity Group	Per Capita Retail Expenditures ($)						
	At 2003/04 Prices	At June 2004 Prices	June 2005 Constant Prices				
			June 2005	June 2011	June 2016	June 2021	June 2031
Food, groceries and liquor	5,421	5,502	5,696	5,867	6,013	6,164	6,318
Bulky goods	1,609	1,633	1,716	1,922	2,114	2,325	2,558
Other household goods	2,092	2,123	2,208	2,341	2,458	2,581	2,710
Total Retail Goods	9,122	9,258	9,620	10,129	10,585	11,070	11,585
Column (1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)

Applied the following compound rates (relevant real factors):-
- Food, groceries and liquor - approximately 0.5% per annum
- Bulky goods - approximately 2.0% per annum
- Other household goods - approximately 1.0% per annum

Column (3) = Column (2) x 1.015
Column (4) = Column (3) x 1.03 x above growth factors
Column (5) = Column (4) x above growth factors
Column (6) = Column (5) x above growth factors
Column (7) = Column (6) x above growth factors
Column (8) = Column (7) x above growth factors

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051125 GloucesterSLA_RetailExp.xls]ExpAtJune05Prices

Table F.3
Gloucester SLA, NSW
Estimated Resident Household Retail Goods Expenditures (constant June 2005 prices) for 2004/05, 2020/21

Major Commodity Group	Gloucester SLA : Resident Household Retail Goods Expenditures $ million at constant June 2005 prices	
	2004/05 * Estimated	2020/21 ** Projected
Food, groceries and liquor	28.31	37.23
Bulky goods	8.53	14.05
Other household goods	10.98	15.59
Total Retail Goods	47.82	66.87

* Estimated Resident Population (ERP) for Gloucester SLA at December 2004 was approximately 4,970 persons.
** Estimated Resident Population (ERP) for Gloucester SLA at December 2020 is projected to be 6,040 persons.

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051125 GloucesterSLA_RetailExp.xls]RetailExpSummary

Table F.4
Gloucester SLA, NSW
Estimated Retail Sales (2004/05 at June 2005 constant prices)
Prepared by Ratio Consultants Pty Ltd, November 2005

Major Commodity Group	Market Share of Household Resident Expenditures % bound to Town Centre	% Retail Sales Drawn from beyond SLA	Estimated Resident Household Expenditures $ million at June 2005 prices	Household Resident Expenditures Bound to Town Centre $ million at June 2005 prices	Estimated Contribution to Retail Sales from beyond SLA $ million at June 2005 prices	Total Estimated Town Centre Retail Sales $ million at June 2005 prices	Escape Expenditures from Gloucester to Other Centres, Towns, Cities $ million at June 2005 prices
Food, groceries and liquor	78.0	25.0	28.31	22.08	7.36	29.44	6.23
Bulky goods	70.0	15.0	8.53	5.97	1.05	7.02	2.56
Other household goods	75.0	15.0	10.98	8.24	1.45	9.69	2.74
Total Retail Goods	N. App.	21.0	47.82	36.29	9.86	46.15	11.53
Column (1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)

Column (5) = Column (2) x Column (4)
Column (6) = Column (7) - Column (5)
Column (7) = [100/(100 - Column (3))] x Column (5)
Column (8) = Column (4) - Column (5)

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051125 GloucesterSLA_RetailExp.xls]SalesJune05Prices

Table F.5
Gloucester SLA, NSW
Estimated Retail Turnover Density (2004/05 at June 2005 prices)
Prepared by Ratio Consultants Pty Ltd, November 2005

Major Commodity Group	Occupied Floorspace m^2 GLA (June 2005)	Estimated Retail Sales $ million at June 2005 prices	Estimated Retail Turnover Density $ turnover/ m^2 GLA/ annum at June 2005 prices
Food, groceries and liquor	5,510	29.44	5,343
Bulky goods	2,223	7.02	3,158
Other household goods	3,819	9.69	2,537
Total Retail Goods	11,552	46.15	3,995
Column (1)	(2)	(3)	(4)

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051125 GloucesterSLA_RetailExp.xls]RTD

Table F.6
Gloucester SLA, NSW
Projected Retail Sales (2020/21 at June 2005 constant prices)
Prepared by Ratio Consultants Pty Ltd, November 2005

Major Commodity Group	Market Share of Resident Household Expenditures % Bound to Town Centre	% Retail Sales Drawn from Beyond SLA	Estimated Resident Household Expenditures $ million at June 2005 prices	Resident Household Expenditures Bound to Town Centre $ million at June 2005 prices	Estimated contribution to retail sales from beyond SLA $ million at June 2005 prices	Total Estimated Town Centre Retail Sales $ million at June 2005 prices	Projected Escape Expenditures from Gloucester to Other Centres, Towns, Cities $ million at June 2005 prices
Food, groceries and liquor	85.0	27.0	37.23	31.65	11.70	43.35	5.58
Bulky goods	70.0	15.0	14.05	9.84	1.74	11.57	4.22
Other household goods	75.0	15.0	15.59	11.69	2.07	13.76	3.90
Total Retail Goods	-	-	66.87	53.17	15.51	68.68	13.70
Column (1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)

Column (5) = Column (2) x Column (4)
Column (6) = Column (7) - Column (5)
Column (7) = [100/(100 - Column (3))] x Column (5)
Column (8) = Column (4) - Column (5)

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051125 GloucesterSLA_RetailExp.xls]ProjectedSales

Table F.7
Gloucester SLA
Assessment of Retail Goods Floorspace Requirements (2005 - 2021)

Major Commodity Group	Gloucester Town Centre				Total required retail goods floorspace Year ended 30 June 2021 (m^2 GLA)	Net additional retail goods floorspace required 2005 - 2021 (m^2 GLA)
	Existing occupied retail goods floorspace (m^2 GLA)	Projected Retail Sales Year ended 30 June 2021 $million at constant June 2005 prices	Retail Turnover Density $ turnover / m2 GLA / annum at constant June 2005 prices			
			Actual (June 2005)	Required for long-term sustainable trading		
Food, groceries and liquor	5,510	43.35	5,664	6,500	6,670	1,160
Bulky goods	2,223	11.57	3,594	3,300	3,510	1,290
Other household goods	3,819	13.76	2,954	3,500	3,930	110
Total Retail Goods	11,552	68.68	4,370	No calculation made	14,110	2,560

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051108 Retail Floorspace.xls]2005-21

Table G

Gloucester Town Centre

Inventory of Retail and Commercial Floorspace (August 2005)

Table G
Gloucester Town Centre
Inventory of Retail and Commercial Floorspace (August 2005)
Source: Floorspace Survey (Ratio Consultants, August 2005)

Food, Groceries and Liquor Stores										Retail Non-Food						Large Format Retail		TOTAL: OCCUPIED RETAIL GOODS		Retail Services		Commercial, Professional and Community Services								Trade Services		Vacant		TOTAL CBD: ALL PRECINCTS	
Supermarkets[1]		Takeaway Food Retailing[2]		Cafés, Bars and Restaurants		Other Retail Food		Total		Clothing and Footwear Stores		Other Household A Stores		Total		Other Household B Stores				Retail Services		Property and Business Services		Health and Community Services		Entertainment, Recreation, Sports and Accommodation		Total		Motor Vehicle and Utilitities Retailing and Services		Vacant			
No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m^2)	No. Est's	GLA (m
2	2350	4	795	8	1767	3	598	17	5510	7	905	15	2914	22	3819	4	2223	43	11552	11	2152	12	2457	6	982	7	1760	25	5199	4	1874	0	0	83	20777

[1] Includes Liquor Retailing
[2] Includes Bread and Cake Retailing and Specialised Retailing n.e.c.

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 050929 Commercial Floorspace Survey.xls]Summary_Final

Table Set H

Gloucester Town Centre

Car Parking Assessments
(2005 – 2021)

Table H.1
Gloucester Town Centre
Car Parking Requirements

Major Floorspace Type	Occupied Floorspace m^2 GLA		Recommended Car Parking Provision Rate car spaces / $100m^2$ GLA	Car Parking Supply Required No. Spaces	
	Current (August 2005)	Required (June 2021)		Based on current floorspace (August 2005)	Based on floorspace required by 2021
Supermarkets	2,350	3,030	5.0	120	150
Other retail stores and shopfront services	11,350	14,660	3.5	400	510
Commercial, professional, community and trade services	7,070	9,060	2.5	180	230
Total : Occupied Retail, Commcercial and Services Floorspace	20,770	26,750	No estimate made (n.e.m)	700	890
Column (1)	(2)	(3)	(4)	(5)	(6)

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051004 Car Parking Survey.xls]Reqts

Table H.2
Gloucester Town Centre
Car Parking Supply Requirements (2005 - 2021)

Item No.	Item	Car Parking Spaces No.	Reference
1.	Gloucester Town Centre: Existing car parking supply. On-street and off-street car parking	430	Table H.3, Column 3
2.	Gloucester Town Centre: Total car parking supply required (2005 - 2011) based on current floorspace supply and demand trends	700	Table H.1, Column 5
3.	Gloucester Town Centre: Total car parking supply required (2011 - 2021) based on projected floorspace requirements and demand growth estimates by 2021	890	Table H.1, Column 6
4.	Additions required to existing car parkings supply by 2011	270	Item 2 - Item 1
5.	Further additions required to car parking (2011 - 2021) to address long-term growth and dmeand projections for the Gloucester Town Centre	190	Item 3 - Item 2

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051004 Car Parking Survey.xls]SupplyReqts

Table H.3
Gloucester Car Parking Inventory
Friday Starting 10.25 am

No.	Location	Capacity	Occupied	%
A	Hume Street	10	7	70
B	Rear Senior Citizens	13	4	31
C	Foodworks CP	18	9	50
D	Church Street (Hume - King)	13	8	62
E	Church Street (King - Denison)	23	21	91
F	Church Street (Denison - Queen)	20	16	80
G	King Street (east of Church)	19	12	63
H	Main east CP (off King Street)	88	61	69
J	Surveyors CP (off King Street)	10	2	20
K	Off-Street CP (north side of Denison)	12	5	42
L	Denison (east to CP)	11	10	91
M	Denison (west)	7	4	57
N	Main West CP	107	94	88
P	Denison west (King - Denison) near Church	13	11	85
Q	Queen east to Post Office	34	11	32
R	Church Street (ext'n north of Queen) to motel only	20	14	70
S	Park Street (to service station and motel)	12	10	83
TOTAL		430	299	70
Column (1)	(2)	(3)	(4)	(5)

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051004 Car Parking Survey.xls]Loc&Capacity

Table Set J

Gloucester Industrial Area

Industrial Land Demand-Supply Assessments
(1991 – 2031)

Table J.1
Gloucester Industrial Area
Inventory of Past Developments (1991 - 2004)
Source: Gloucester Shire Council

Date	Street	Use	Site Area (m^2)	Building Area (m^2)
17/09/1991	Kendall	Tractor machinery	1,574	317
29/11/1991	Kendall	(Contractor)	4,571	1,039
4/12/1991	Kendall	Mining vehicle manufacture	4,727	1,574
14/10/1992	Kendall	Window doors	1,818	519
7/11/1995	Clement	Fuel and haulage	3,506	1,195
14/03/1996	Kendall	Excavation	2,363	682
8/08/1999	Lowe	Fish processing	2,363	156
19/12/2001	Tate	Storage hire	2,454	312
1/08/2002	Lowe	Equipment store	2,727	364
28/11/2002	Cementary	Decorative cement bricks	2,000	883
2/12/2005	Kendall	Service centre	1,351	390
2/12/2002	Lowe	Service centre	3,117	857
7/02/2003	Cementary	Furniture	909	364
19/02/2003	Tate	Landscaping supplies	9,415	2,141*
30/05/2003	Lowe	Camp kitchens	3,740	850*
7/02/2003	Lowe	Motor cars	3,454	156
9/01/2004	Clement	Windows doors	3,714	390
24/06/2004	Tate	Boats	3,246	738*
7/09/2004	Tate	Horsefloats	3,506	797*
Total			60,555	13,724

* Estimated

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051108 Industrial Area Inventory.xls]Inventory

Table J.2
Gloucester Industrial Area
Industrial Land Take-Up Rates (July 1991 - December 2004)

Period		Industrial Land Take-Up m^2 site area		Industrial Building Area Absorption m^2 Gross Building Area (GBA)	
		Take-up for period	Average take-up/ annum	Absorption for period	Average absorption/ annum
1 July 1991 - 30 June 1996	(5 years)	18,559	3,712	5,326	1,065
1 July 1996 - 30 June 2001	(5 years)	2,363	473	156	31
2 July 2001 - 31 December 2004	(3.5 years)	39,633	11,324	8,242	2,355
1 July 1991 - 31 December 2004	(13.5 years)	60,555	4,486	13,724	1,017
1 July 1996 - 31 December 2004	(8.5 years)	41,996	4,940	8,398	988

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051108 Industrial Area Inventory.xls]Take-UpRates1991-2004

Table J.3
Gloucester Industrial Area
Projected Industrial Land Take-Up Rates (1st January 2005 - 30 June 2031)

Period	Projected Industrial Land Take-Up Rates (m^2 site area / annum)		
	Low	Middle	High
1st January 2005 - 30 June 2016	3,710	4,490	4,940
1 July 2016 - 30 June 2031	4,390	5,310	5,840

* Resident households are projected to increase in the Shire over the 15 year period 2001-2016 by 30.0%, and by 35.5% over the 15 year period. Differential ratio of growth rates = 1.183. This factor was taken to reflect the long-term differential rates for increased general housing development and also related industrial development.

H:\Projects\6000\6633 Gloucester Retail Study\Data\[6633 051108 Industrial Area Inventory.xls]Take-UpRates2005-21

Table J.4
Gloucester Industrial Area
Projected Industrial Land Demand Requirements and Impacts on Supply
(1st January 2005 - 30 June 2031)

Item No.	Item	Industrial Site Area (m^2)	Reference
1	Gloucester Industrial Area : Existing zoned and undeveloped industrial land supply at October 2005	88,810	Source: Industrial information supplied by Council
2	Gloucester Industrial Area : Projected industrial land demand 1January 2005 - 30 June 2016	51,640	Tables J.2, J.3
3	Allowance for 15 year perpetual rolling land reserve to be retained at 30 June 2016	67,350	Table J.2
4	Gloucester Industrial Area : Total industrial land demand 1 January 2005 - 30 June 2016, allowing for a perpetual 15 year rolling land reserve	118,990	Item 2 + Item 3
5	Gloucester Industrial Area : Additional zoned and developed industrial land required by 30 June 2011	30,180	Item 4 - Item 1
6	Gloucester Industrial Area : Projected industrial land demand 1 July 2016 - 30 June 2031	79,650	Table J.3
7	Gloucester Industrial Area : Initial industrial land supply shortfall at 1st July 2016, taking account of available reserve supply and projected demand 1 July 2016 - 30 June 2031	12,300	Item 6 - Item 3
8	Reinstatement requirement for 15 year perpetual reserve at 1 July 2016	79,650	Table J.3
9	Gloucester Industrial Area : Additional zoned and serviced industrial land required by 30 June 2021	91,950	Item 7 + Item 8
10	Gloucester Industrial Area : Total additional zoned land required to meet projected demands 1 January 2005 - 30 June 2031 and provide for a 15 year perpetual rolling reserve	122,130	Item 5 + Item 9
11	Gloucester Industrial Area : Existing and potentially available future industrial land (south of Cementery Road and east of Tate Street) currently zoned 7(d)	172,700	Industrial information supplied by Council. Area is net of an allowance for future roads of $31,000m^2$

Table Set K

Gloucester In-Centre Survey and Results
(August 2005)

Sample, n = 241

Job No. 6633

GLOUCESTER TOWN CENTRE
IN-CENTRE SURVEY
August 2005

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

Sex: Male ☐ Female ☐

1. What locality or town do you live in?

Locality/Town ________________ Postcode ☐☐☐☐

2. How did you travel to town today?

Car (as driver) ☐
Car (as passenger) ☐
Walk ☐
Other (please write)
____________________ ☐☐

Local Bus Service ☐
Taxi ☐

3. What shops or services are you visiting today? (Can tick more than one box)

IGA-Garners ☐
Foodworks ☐
Gloucester Pharmacy ☐
Newsagency ☐
Garners Home Hardware ☐
Yates & Twoomey Hardware ☐
Gloucester Furniture 1 Store ☐

Post Office ☐
Library ☐
Cafés/ Hotel ☐
Banks/ Building Society ☐
Other (specify) ☐

____________________ ☐
____________________ ☐

4. **Approximately how frequently do you visit Gloucester town centre?**

Daily/Several Times a Week	☐	Monthly	☐
Approximately Weekly	☐	Less Frequently	☐
Fortnightly	☐	First Time/Hardly Ever	☐

5. **Over the year, approximately what proportion of your food and groceries would you purchase in the Gloucester town centre? (includes all supermarkets and food stores in the Gloucester town centre)**

Almost 0%	<25%	25-50%	50-75%	75-100%	Almost 100%

6. **What types of shops and services or other improvements would you like to see in the town centre?**

____

____

____

7. **Over the past two years, where have you purchased household appliances, furniture and furnishings?**

Store Name ____________________ Location ____________________ ☐☐

Store Name ____________________ Location ____________________ ☐☐

8. **Over the past two years, where have you purchased footwear and clothing?**

Store Name ____________________ Location ____________________ ☐☐

Store Name ____________________ Location ____________________ ☐☐

9. **To what age group do you belong?**

18 years and Under ☐ 19-29 years ☐ 30-39 years ☐ 40-59 years ☐ 60+ years ☐

10. What other cities or towns have you visited in the past 12 months. Tick relevant boxes.

City or Town	If YES, for what purpose (can tick more than one box)					
	Sporting	Social	Shopping	Medical	Professional Services	Other
Cessnock						
Coffs Harbour						
Forster						
Gosford						
Kempsey						
Maitland						
Newcastle						
Port Macquarie						
Raymond Terrace						
Singleton						
Sydney						
Tamworth						
Taree						
Wingham						
Other Towns (specify)						
Other Towns (specify)						
Other Towns (specify)						
Other Towns (specify)						

Thank you for you co-operation

Gloucester Town Centre
In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Gender

Category	Response	
	No.	%
Males	102	42.3
Females	139	57.7
Total Net Valid Responses	241	100.0

n = 241

Gloucester Retail Study
Gloucester Town Centre In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q1. What locality or town do you live in?

State, SLA, City/ Town		Postal Area	Response	
			No.	%
New South Wales -				
Gloucester (A)	Gloucester	2422	174	72.2
	Barrington	2422	7	2.9
	Stratford	2422	4	1.7
	Craven	2422	2	0.8
	Total		*187*	*77.6*
Great Lakes (A)				
	Stroud	2425	5	2.1
	Wards River	2422	3	1.2
	Berrico	2422	2	0.8
	Upper Myall	2423	2	0.8
	Cobark	2422	1	0.4
	Copeland	2422	1	0.4
	Forster	2428	1	0.4
	Moppy	2422	1	0.4
	Stroud Road	2415	1	0.4
	Tugrabakh	2422	1	0.4
	Warramulla	2423	1	0.4
	Waukiwory	2422	1	0.4
	Total		*20*	8.3
Sydney (C) - Inner	Sydney	2000	7	2.9
				0.0
Hastings (A) - Pt B	Bucca-Wauka	2429	1	0.4
	Kramback	2429	1	0.4
	Port Macquarie	2444	1	0.4
	Wyngham	2429	1	0.4
	Total		*4*	*1.7*
Guyra (A)	Armidale	2350	4	1.7
Lake Macquarie (C)	Belmont	2280	1	0.4
	Wangi Wangi	2267	1	0.4
	Total		*2*	*0.8*
Cessnock (C)	Cessnock	2325	2	0.8
Gunning (A)	Queanbeyan	2620	2	0.8
Newcastle (C) - Remainder	Newcastle	2300	1	0.4
Shoalhaven (C) - Pt A	Nowra	2540	1	0.4
South Sydney (C)	Redfern	2016	1	0.4
Tenterfield (A)	Tenterfield	2372	1	0.4
Total New South Wales			232	96.3
Other -				
QLD				
	Brisbane	4520	1	0.4
	Gold Coast	4217	1	0.4
	Hervey Bay	4655	1	0.4
	Total		*3*	1.2

Gloucester Retail Study
Gloucester Town Centre In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q1. What locality or town do you live in?

State, SLA, City/ Town		Postal Area	Response	
			No.	%
ACT	Canberra	2611	1	0.4
				0.0
SA	Adelaide	8000	1	0.4
Vic	Melbourne	3056	1	0.4
WA	Bussenton	6280	1	0.4
Location not provided	Location not provided	n.a	1	0.4
	Overseas	n.a	1	0.4
	Total		*2*	0.8
Total Other			9	3.7
Total Net Valid Responses			241	100.0

n = 241

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 050907 Survey Results.xls]Q1_v2

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

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

Mode of transport	Response	
	No.	%
Car (as driver)	162	67.5
Car (as passenger)	38	15.8
Walk	38	15.8
Taxi	1	0.4
Other	1	0.4
Total Net Valid Responses	240	100.0

n = 241

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 050907 Survey Results.xls]Q2

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q3. What shops or services are you visiting today? (multiple responses permitted)

Cateogry, Shops/ Services Visiting	Responses		Respondents (n = 241)
	No.	%	%
Food, Groceries and Liquor Stores -			
IGA-Garners	122	16.0	50.6
Foodworks	117	15.4	48.5
Cafes/ Hotel	44	5.8	18.3
Bakery	23	3.0	9.5
Butcher	8	1.0	3.3
Blakey's	3	0.4	1.2
Health Food Shop	3	0.4	1.2
Fruit Bowl	2	0.3	0.8
Gloucester Health Foods	2	0.3	0.8
Ice Cream Shop	2	0.3	0.8
Fishmonger	1	0.1	0.4
Hotel	1	0.1	0.4
Perenti	1	0.1	0.4
Produce	1	0.1	0.4
Total	*330*	*43.3*	*n.a*
Household Stores			
Newsagency	75	9.8	31.1
Post Office	69	9.1	28.6
Gloucester Pharmacy	46	6.0	19.1
Garners Home Hardware	29	3.8	12.0
Yates & Twoomey Hardware	14	1.8	5.8
Chemist	2	0.3	0.8
Photo Shop	1	0.1	0.4
Daffodil Flower Store	1	0.1	0.4
Total	*237*	*31.1*	*n.a*
Retail Commercial Services			
Banks/ Building Society	74	9.7	30.7
Library	27	3.5	11.2
Total	*101*	*13.3*	*n.a*
Furniture & Electrical			
Gloucester furniture 1 Store	13	1.7	5.4
Retravision	5	0.7	2.1
Phone Shop	1	0.1	0.4
Total	*19*	*2.5*	*n.a*
Medical and Professional Services			
Webb Brothers Real Estate	3	0.4	1.2
Medical Centre	2	0.3	0.8
Baby Clinic	1	0.1	0.4
Chiropractor	1	0.1	0.4
Dentist	1	0.1	0.4
Doctor	1	0.1	0.4
Dwyer Real Estate	1	0.1	0.4
Elders Real Estate	1	0.1	0.4
Hospital	1	0.1	0.4
Solicitor	1	0.1	0.4
Veterninarian	1	0.1	0.4
Total	*14*	*1.8*	*n.a*
Recreation, Leisure & Entertainment			
RSL	*3*	0.4	1.2
Music Shop	2	0.3	0.8
Gym	2	0.3	0.8
Craft Shops	1	0.1	0.4

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q3. What shops or services are you visiting today? (multiple responses permitted)

Cateogry, Shops/ Services Visiting	Responses		Respondents (n = 241)
	No.	%	%
Bingo	1	0.1	0.4
Travel Agent	1	0.1	0.4
Total	*10*	*1.3*	*n.a*
Clothing, Footwear and Fabrics Stores -			
McRae's	4	0.5	1.7
Shoe Shop	3	0.4	1.2
Sansoms	1	0.1	0.4
Total	*8*	*1.0*	*n.a*
Personal Services			
Hair Dresser	5	0.7	2.1
Total	*5*	*0.7*	*n.a*
Motor Vehicle Services			
Tyre Service	2	0.3	0.8
Motor Vehicle Retailer	1	0.1	0.4
GWH Sales	1	0.1	0.4
Total	*4*	*0.5*	*n.a*
Discount Department Stores			
Discount Warehouse	1	0.1	0.4
Town & Country	1	0.1	0.4
Total	*2*	*0.3*	*n.a*
Education			
Primary School	1	0.1	0.4
Total	*1*	*0.1*	*n.a*
Other -			
Visitor Information Centre	8	1.0	3.3
Service Station	3	0.4	1.2
Rural Stores	3	0.4	1.2
Rural Supplies	2	0.3	0.8
Mobil Service Station	2	0.3	0.8
Basecamp Warehouse	2	0.3	0.8
Watchmaker	1	0.1	0.4
Tobacconist	1	0.1	0.4
Saleyards	1	0.1	0.4
Motel	1	0.1	0.4
Meals on Wheels Opening	1	0.1	0.4
Eriksons	1	0.1	0.4
Elders Produce	1	0.1	0.4
CRT - Combined Rural Traders	1	0.1	0.4
Clock Doctor	1	0.1	0.4
Church	1	0.1	0.4
Centrelink	1	0.1	0.4
Total	*31*	*4.1*	*n.a*
Total Net Valid Responses	762	100.0	n.a

n.a = not applicable

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q3. Number of stores and faciltiies visited by respondents

No. stores / facilities visited	Respondents	
	No.	%
0	1	0.4
1	40	16.6
2	60	24.9
3	45	18.7
4	35	14.5
5	30	12.4
> 5	30	12.4
Total Net Valid Responses	241	100.0

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 050907 Survey Results.xls]Q3_No.Stores

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q4. Approximately how frequently do you visist Gloucester town centre?

Frequency of visits	Response	
	No.	%
Daily/Several Times a Week	175	72.9
Approximately Weekly	26	10.8
Forthnightly	7	2.9
Monthly	5	2.1
Less Frequently	16	6.7
First Time/Hardly Ever	11	4.6
Total Net Valid Responses	240	100.0

n = 241

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q5. Over the year, approximately what proportion of your food and groceries would you purchase in the Gloucester town centre?

Percentage of yearly purchases	Response	
	No.	%
Almost 0%	27	11.4
<25%	22	9.3
25-50%	18	7.6
50-75%	29	12.3
75-100%	68	28.8
Almost 100%	72	30.5
Total Net Valid Responses	236	100.0

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q5. Over the year, approximately what proportion of your food and groceries would you purchase in the Gloucester town centre?

Gloucester SLA residents and their response

Percentage of yearly purchases	Response	
	No.	%
Almost 0%	2	1.1
<25%	12	6.5
25-50%	15	8.1
50-75%	26	14.0
75-100%	63	33.9
Almost 100%	68	36.6
Total Net Valid Responses	186	100.0

n.a - not applicable

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 050907 Survey Results.xls]Q5_Gloucester SLA

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q5. Over the year, approximately what proportion of your food and groceries would you purchase in the Gloucester town centre?

Non-Gloucester SLA residents and their response

Percentage of yearly purchases	Response	
	No.	%
Almost 0%	25	50.0
<25%	10	20.0
25-50%	3	6.0
50-75%	3	6.0
75-100%	5	10.0
Almost 100%	4	8.0
Total Net Valid Responses	50	100.0

n.a - not applicable

Gloucester Retail Study
Gloucester Town Centre In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q6. What shops, services or other improvements would you like to see in the town centre? (multiple responses permitted)

Shops, Services, Other Improvements	Responses		Respondents (n = 241)
	No.	%	%
Supermarket			
Supermarket	45	24.9	18.7
Bi-Lo	11	6.1	4.6
Woolworths	5	2.8	2.1
Coles	1	0.6	0.4
Other	1	0.6	0.4
Total	*63*	*34.8*	*n.a*
Recreation, Leisure & Entertainment			
Cinema	11	6.1	4.6
Bookshop	4	2.2	1.7
Cinema	2	1.1	0.8
Ice rink	1	0.6	0.4
Travel Agency	1	0.6	0.4
Surf Shop	1	0.6	0.4
Sporting Events	1	0.6	0.4
Music	1	0.6	0.4
Entertainment	1	0.6	0.4
Cultural events	1	0.6	0.4
Gym	1	0.6	0.4
Total	*25*	*13.8*	*n.a*
Food, Groceries and Liquor Stores -			
Cafés /Restaurant/ Hotel	9	5.0	3.7
Café/ Hotel/ Restaurant - Extended trading hours	3	1.7	1.2
Delicatessan	2	1.1	0.8
Vegetarian Café	1	0.6	0.4
McDonalds	1	0.6	0.4
Fewer Cafés/ Restaurants/ Hotels	1	0.6	0.4
Total	*17*	*9.4*	*n.a*
Clothing, Footwear and Fabrics Stores -			
Children's clothing	8	4.4	3.3
Clothing Store	2	1.1	0.8
Discount Shoe Store	2	1.1	0.8
Department Store	1	0.6	0.4
Clothing Warehouse	1	0.6	0.4
Discount Shoe Store	1	0.6	0.4
Modern clothes shops	1	0.6	0.4
Total	*16*	*8.8*	*n.a*
Household Stores			
Chemist	3	1.7	1.2
Chemist - Extended opening hours	2	1.1	0.8
Gift shop	1	0.6	0.4
Reject Shop	1	0.6	0.4
Fabric Shop	1	0.6	0.4
Total	*8*	*4.4*	*n.a*
Discount Department Stores			
Target	2	1.1	0.8
Kmart	2	1.1	0.8
Best and Less	1	0.6	0.4
Big W	1	0.6	0.4
Total	*6*	*3.3*	*n.a*
Motor Vehicle Services			
Petrol Station	2	1.1	0.8
Motorbike shop	1	0.6	0.4
Toyota Dealer	1	0.6	0.4
Tyre Outlet	1	0.6	0.4
Total	*5*	*2.8*	*n.a*
Furniture & Electrical			
Electronic Store	1	0.6	0.4
Furniture Shop	1	0.6	0.4
Total	*2*	*1.1*	*n.a*
Medical and Professional Services			
Health facilities	1	0.6	0.4
Dentist	1	0.6	0.4
Total	*2*	*1.1*	*n.a*
Personal Services			
Hairdressers	2	1.1	0.8
Total	*2*	*1.1*	*n.a*
Other -			
More shops /services for youths	7	3.9	2.9
Extended trading hours	4	2.2	1.7
Meeting Place	2	1.1	0.8
More competition	2	1.1	0.8
Parking	2	1.1	0.8
Vandalism	2	1.1	0.8

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q6. What shops, services or other improvements would you like to see in the town centre? (multiple responses permitted)

Shops, Services, Other Improvements	Responses		Respondents (n = 241)
	No.	%	%
Clean streets	1	0.6	0.4
DA's for driveways	1	0.6	0.4
Family Activities	1	0.6	0.4
Fix road	1	0.6	0.4
Garner's carpark sealed	1	0.6	0.4
More bench seats	1	0.6	0.4
More police at night	1	0.6	0.4
No Parking Police	1	0.6	0.4
No traffic lights	1	0.6	0.4
Parking - Disabled	1	0.6	0.4
Pedestrian Mall	1	0.6	0.4
Remove garden wedges	1	0.6	0.4
Saw Sharpening Shop	1	0.6	0.4
Shopping Centre	1	0.6	0.4
Shops and services for children and mothers	1	0.6	0.4
Specialty Shops	1	0.6	0.4
Total	*35*	*19.3*	*n.a*
Total Net Valid Responses	181	100.0	n.a

n.a = not applicable

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 050907 Survey Results.xls]Q6

Gloucester Retail Study
Gloucester Town Centre In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q7. Over the past 2 years, where have you purchased household appliances, furniture and furnishings? (multiple responses permitted)

State	Store Location	Store Name	Response		Respondents (n = 241)
			No.	%	%
New South Wales	Gloucester	Retravision	142	48.6	58.9
		Furniture One	62	21.2	25.7
		Home Hardware	8	2.7	3.3
		Garners	4	1.4	1.7
		Backhill Way	1	0.3	0.4
		Basement Warehouse	1	0.3	0.4
		Blinds and Awnings	1	0.3	0.4
		Fantastic Furniture	1	0.3	0.4
		Foodworks	1	0.3	0.4
		Freedom	1	0.3	0.4
		IGA	1	0.3	0.4
		Leisure Time	1	0.3	0.4
		Total	*224*	*76.7*	*n.a*
	Taree	Big W	7	2.4	2.9
		harvey norman	6	2.1	2.5
		Kmart	5	1.7	2.1
		Furniture One	3	1.0	1.2
		Retravision	2	0.7	0.8
		Clancy's	1	0.3	0.4
		Fancy Goods Shop	1	0.3	0.4
		Fantastic Furniture	1	0.3	0.4
		Forty Winks	1	0.3	0.4
		Homemakers	1	0.3	0.4
		Homeworld	1	0.3	0.4
		New Blinds	1	0.3	0.4
		Several	1	0.3	0.4
		Total	*31*	*10.6*	*n.a*
	Sydney	Harvey norman	3	1.0	1.2
		Fantastic Furniture	1	0.3	0.4
		Good Guys	1	0.3	0.4
		Myer	1	0.3	0.4
		Retravision	1	0.3	0.4
		Seconds World	1	0.3	0.4
		Several	1	0.3	0.4
		Store name not provided	1	0.3	0.4
		Various	1	0.3	0.4
		Total	*11*	*3.8*	*n.a*
	Newcastle	Bunnings	1	0.3	0.4
		David Jones	1	0.3	0.4
		General	1	0.3	0.4
		Kmart	1	0.3	0.4
		Retravision	1	0.3	0.4
		Total	*5*	*1.7*	*n.a*
	Forster	Retravision	3	1.0	1.2
		Harvey norman	1	0.3	0.4
		Silvercity	1	0.3	0.4
		Total	*5*	*1.7*	*n.a*
	Maitland	Good Guys	2	0.7	0.8

Gloucester Retail Study
Gloucester Town Centre In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q7. Over the past 2 years, where have you purchased household appliances, furniture and furnishings? (multiple responses permitted)

State	Store Location	Store Name	Response No.	Response %	Respondents (n = 241) %
	Tamworth	Several	1	0.3	0.4
	Warrawong	Freedom	1	0.3	0.4
Total New South Wales			280	95.9	n.a
Queensland	Brisbane	Several	2	0.7	0.8
	Charlestown	Big W	1	0.3	0.4
	Gold Coast	Several	1	0.3	0.4
	Hervey Bay	Several	1	0.3	0.4
		Total	*5*	*1.7*	*n.a*
Location not provided		Furniture One	3	1.0	1.2
		Captain Snooze	1	0.3	0.4
		Jo's	1	0.3	0.4
		Retravision	1	0.3	0.4
		Total	*6*	*2.1*	*n.a*
Internet		Ebay	1	0.3	0.4
Total Net Valid Responses			292	100.0	n.a

n.a = not applicable

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 051007 Survey Results_Q7.xls]Q7_Rsp_Loc&Store

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q7. Over the past 2 years, where have you purchased household appliances, furniture and furnishings? (multiple responses permitted)

State	Store Location	Response		Respondents (n = 241)
		No.	%	%
New South Wales	Gloucester	224	76.7	92.9
	Taree	31	10.6	12.9
	Sydney	11	3.8	4.6
	Forster	5	1.7	2.1
	Newcastle	5	1.7	2.1
	Maitland	2	0.7	0.8
	Tamworth	1	0.3	0.4
	Warrawong	1	0.3	0.4
	Total	*280*	*95.9*	*n.a*
Queensland	Brisbane	2	0.7	0.8
	Charlestown	1	0.3	0.4
	Gold Coast	1	0.3	0.4
	Hervey Bay	1	0.3	0.4
	Total	*5*	*1.7*	*n.a*
Other	Location not provided	6	2.1	2.5
	Internet	1	0.3	0.4
	Total	*7*	*2.4*	*n.a*
Total Net Valid Responses		292	100.0	n.a

n.a = not applicable

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q7. Over the past 2 years, where have you purchased household appliances, furniture and furnishings? (multiple responses permitted)

Residents from Gloucester SLA and where they shop (location)

Store Location	Response		Respondents (n = 241)
	No.	%	%
Gloucester	195	79.9	80.9
Taree	27	11.1	11.2
Location not provided	6	2.5	2.5
Sydney	5	2.0	2.1
Forster	4	1.6	1.7
Newcastle	4	1.6	1.7
Maitland	2	0.8	0.8
Internet	1	0.4	0.4
Total Net Valid Responses	244	100.0	n.a

n.a = not applicable

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 051007 Survey Results_Q7.xls]Q7_Gloucester SLA

Gloucester Retail Study
Gloucester Town Centre In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q7. Over the past 2 years, where have you purchased household appliances, furniture and furnishings? (multiple responses permitted)

State	Store Name	Response		Respondents (n = 241)
		No.	%	%
New South Wales	Retravision	149	51.0	61.8
	Furniture One	65	22.3	27.0
	harvey norman	10	3.4	4.1
	Home Hardware	8	2.7	3.3
	Big W	7	2.4	2.9
	kmart	6	2.1	2.5
	Garners	4	1.4	1.7
	Fantastic Furniture	3	1.0	1.2
	Good Guys	3	1.0	1.2
	Several	3	1.0	1.2
	Freedom	2	0.7	0.8
	Backhill Way	1	0.3	0.4
	Basement Warehouse	1	0.3	0.4
	Blinds and Awnings	1	0.3	0.4
	Bunnings	1	0.3	0.4
	Clancy's	1	0.3	0.4
	David Jones	1	0.3	0.4
	Fancy Goods Shop	1	0.3	0.4
	Foodworks	1	0.3	0.4
	Forty Winks	1	0.3	0.4
	General	1	0.3	0.4
	Homemakers	1	0.3	0.4
	homeworld	1	0.3	0.4
	IGA	1	0.3	0.4
	Leisure Time	1	0.3	0.4
	Myer	1	0.3	0.4
	New Blinds	1	0.3	0.4
	Seconds World	1	0.3	0.4
	Silvercity	1	0.3	0.4
	Store name not provided	1	0.3	0.4
	Various	1	0.3	0.4
	Total	*280*	*95.9*	*n.a*
Queensland	Several	4	1.4	1.7
	Big W	1	0.3	0.4
	Total	*5*	*1.7*	*2.1*
			0.0	0.0
Internet	Ebay	1	0.3	*n.a*
Location not provided	Furniture One	3	1.0	1.2
	Captain Snooze	1	0.3	0.4
	Jo's	1	0.3	0.4
	Retravision	1	0.3	0.4
	Total	*6*	*2.1*	*n.a*
Total Net Valid Responses		292	100.0	n.a

n.a = not applicable

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q8. Over the past 2 years, where have you purchased footwear and clothing?

State	Store Location	Response		Respondents (n = 241)
		No.	%	%
New South Wales	Gloucester	204	55.7	84.6
	Taree	87	23.8	36.1
	Newcastle	22	6.0	9.1
	Sydney	18	4.9	7.5
	Forster	8	2.2	3.3
	Location not provided	8	2.2	3.3
	Raymond Terrace	7	1.9	2.9
	Gosford	2	0.5	0.8
	Armidale	1	0.3	0.4
	Greenhills	1	0.3	0.4
	Nowra	1	0.3	0.4
	Total	*359*	*98.1*	*n.a*
Queensland	Charlestown	3	0.8	1.2
	Brisbane	2	0.5	0.8
	Gold Coast	1	0.3	0.4
	Hervey Bay	1	0.3	0.4
	Total	*7*	*1.9*	*n.a*
Total Net Valid Responses		366	100.0	n.a

n.a = not applicable

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q8. Over the past 2 years, where have you purchased footwear and clothing?

Non-Gloucester SLA residents and where they shopped (location)

Store Location	Response		Respondents (n = 241)
	No.	%	%
Gloucester	30	53.6	12.4
Taree	8	14.3	3.3
Sydney	5	8.9	2.1
Brisbane	2	3.6	0.8
Charlestown	2	3.6	0.8
Location not provided	2	3.6	0.8
Raymond Terrace	2	3.6	0.8
Armidale	1	1.8	0.4
Gold Coast	1	1.8	0.4
Hervey Bay	1	1.8	0.4
Newcastle	1	1.8	0.4
Nowra	1	1.8	0.4
Total Net Valid Responses	56	100	n.a

n.a = not applicable

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q8. Over the past 2 years, where have you purchased footwear and clothing?

Residents from Gloucester SLA and where they shopped (location)

Store Location	Response		Respondents (n = 241)
	No.	%	%
Gloucester	174	56.1	72.2
Taree	79	25.5	32.8
Newcastle	21	6.8	8.7
Sydney	13	4.2	5.4
Forster	8	2.6	3.3
Location not provided	6	1.9	2.5
Raymond Terrace	5	1.6	2.1
Gosford	2	0.6	0.8
Charlestown	1	0.3	0.4
Greenhills	1	0.3	0.4
Total Net Valid Responses	310	100.0	n.a

n.a = not applicable

Gloucester Retail Study
Gloucester Town Centre In-Centre Survey (August 2005)
Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q8. Over the past 2 years, where have you purchased footwear and clothing?

State	Store Name	Response		Respondents (n = 241)
		No.	%	%
New South Wales	G. Footwear	92	25.1	38.2
	McRaes Fashion Centre	34	9.3	14.1
	Big W	29	7.9	12.0
	Gloucester Town & Country Store	23	6.3	9.5
	Sansoms Menswear	23	6.3	9.5
	Kmart	20	5.5	8.3
	Store name not provided	19	5.2	7.9
	Several	13	3.6	5.4
	Lowes	8	2.2	3.3
	Manning Shoe Store	6	1.6	2.5
	Millers	6	1.6	2.5
	Target	6	1.6	2.5
	Various	6	1.6	2.5
	David Jones	5	1.4	2.1
	Leisure Time	5	1.4	2.1
	McRaes Fashion Centre	5	1.4	2.1
	Op Shop	4	1.1	1.7
	Best & Less	3	0.8	1.2
	Rivers	3	0.8	1.2
	Sonja	3	0.8	1.2
	Varcoes	3	0.8	1.2
	Elders	2	0.5	0.8
	specialty stores	2	0.5	0.8
	stocklands	2	0.5	0.8
	surf shops	2	0.5	0.8
	triple c	2	0.5	0.8
	16-26	1	0.3	0.4
	Bi-Lo	1	0.3	0.4
	Campbells	1	0.3	0.4
	Coastal Corporate Clothing	1	0.3	0.4
	Coles	1	0.3	0.4
	Colorado	1	0.3	0.4
	Crossroads	1	0.3	0.4
	Daveons mens wear	1	0.3	0.4
	department store	1	0.3	0.4
	Discount Shoes	1	0.3	0.4
	Discount store	1	0.3	0.4
	Doriyans	1	0.3	0.4
	general	1	0.3	0.4
	Gloucester furniture warehouse	1	0.3	0.4
	Gosford Shopping Complex	1	0.3	0.4
	grace bros	1	0.3	0.4
	Harrods	1	0.3	0.4
	J J clothing	1	0.3	0.4
	jeans west	1	0.3	0.4
	lawsons mews mon	1	0.3	0.4
	Lowes menswear	1	0.3	0.4
	Majestic Op shop	1	0.3	0.4
	Manny Shoe Hire	1	0.3	0.4
	Millers	1	0.3	0.4
	myer	1	0.3	0.4
	Noni B/Wombat	1	0.3	0.4

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q8. Over the past 2 years, where have you purchased footwear and clothing?

State	Store Name	Response		Respondents (n = 241)
		No.	%	%
	overseas	1	0.3	0.4
	pharmacy	1	0.3	0.4
	Vet Affairs	1	0.3	0.4
	westfield	1	0.3	0.4
	Williams	1	0.3	0.4
	Woolworths	1	0.3	0.4
	Z. Time	1	0.3	0.4
	Total	*359*	*98.1*	*n.a*
Queensland	Several	2	0.5	0.8
	Store name not provided	2	0.5	0.8
	Supre	2	0.5	0.8
	Payless shoes	1	0.3	0.4
	Total	*7*	*1.9*	*n.a*
Total Net Valid Responses		366	100.0	n.a

n.a = not applicable

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 051007 Survey Results_Q8.xls]Q8_Store

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q9. To what age group do you belong?

Age group	Response	
	No.	%
18 years and under	8	3.5
19-29 years	13	5.7
30-39 years	36	15.7
40-59 years	89	38.7
60+ years	84	36.5
Total Net Valid Responses	230	100

Sample size, n = 241

H:\Projects\6000\6633 Gloucester Retail Study\Data\Survey Results\[6633 050907 Survey Results.xls]Q9

Gloucester Retail Study

Gloucester Town Centre In-Centre Survey (August 2005)

Source: Ratio Consultants, Gloucester Town Centre In-Centre Survey, August 2005

Q10. What other cities or towns have you visited in the past 12 months?

Cities/ Towns Visited	Sporting		Social		Shopping		Medical		Professional Services		Other		Total		
	Responses	Respondents n = 241	Responses	Respondents n = 241	Responses	Respondents n = 241	Responses	Respondents n = 241	Responses	Respondents n = 241	Responses	Respondents n = 241	Responses		Respondents n = 241
	No.	**%**	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	%
Newcastle	8	3.3	91	37.8	70	29.0	59	24.5	21	8.7	15	6.2	264	17.1	109.5
Forster	18	7.5	87	36.1	63	26.1	33	13.7	4	1.7	17	7.1	222	14.4	92.1
Taree	10	4.1	38	15.8	100	41.5	42	17.4	12	5.0	15	6.2	217	14.1	90.0
Sydney	7	2.9	91	37.8	41	17.0	15	6.2	9	3.7	21	8.7	184	11.9	76.3
Raymond Terrace	4	1.7	28	11.6	70	29.0	4	1.7	4	1.7	11	4.6	121	7.8	50.2
Maitland	9	3.7	32	13.3	29	12.0	28	11.6	10	4.1	12	5.0	120	7.8	49.8
Port Macquarie	10	4.1	38	15.8	14	5.8	1	0.4	6	2.5	7	2.9	76	4.9	31.5
Tuggarah	5	2.1	17	7.1	30	12.4	8	3.3	4	1.7	4	1.7	68	4.4	28.2
Coffs Harbour	3	1.2	34	14.1	4	1.7	2	0.8	2	0.8	5	2.1	50	3.2	20.7
Gosford	3	1.2	34	14.1	9	3.7	1	0.4	1	0.4	2	0.8	50	3.2	20.7
Tamworth	2	0.8	28	11.6	6	2.5	1	0.4	2	0.8	11	4.6	50	3.2	20.7
Kempsey	1	0.4	22	9.1	1	0.4	0	0.0	3	1.2	4	1.7	31	2.0	12.9
Cessnock	4	1.7	9	3.7	6	2.5	1	0.4	2	0.8	7	2.9	29	1.9	12.0
Singleton	2	0.8	14	5.8	1	0.4	0	0.0	1	0.4	10	4.1	28	1.8	11.6
Armidale	2	0.8	4	1.7	2	0.8	2	0.8	2	0.8	2	0.8	14	0.9	5.8
Wingham	0	0.0	3	1.2	4	1.7	0	0.0	0	0.0	0	0.0	7	0.5	2.9
Canberra	1	0.4	1	0.4	1	0.4	1	0.4	1	0.4	1	0.4	6	0.4	2.5
Erina	0	0.0	2	0.8	3	1.2	0	0.0	0	0.0	0	0.0	5	0.3	2.1
Total Net Valid Responses	89	n.a	573	n.a	454	n.a	198	n.a	84	n.a	144	n.a	1,542	100.0	n.a