GLEN IRIS ESTATE

APPENDIX 13
RETAIL NEEDS ASSESSMENT

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Taktics4
Glen Iris Local Centre

Centre Development Strategy

Acumen
Feb 2022

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EXECUTIVE SUMMARY

The analysis of the retail and consumer markets influencing the potential development of a retail centre at Glen Iris indicate that a small supermarket based local centre is the most suitable development opportunity. A small supermarket based local centre in Glen Iris would be likely to comprise:

SMALL SUPERMARKET BASED CENTRE – Development Characteristics	
Supermarket	***1,500sqm***
Shops	*5 - 10*
Shop Floorspace (sqm)	*1,000sqm*
Total	***2,500sqm***

A proposed Local Centre:

- could expect to be trading prior to 2031.
- can be contained within an allocated commercially zoned parcel of land totalling 0.70Ha.
- will rely on capturing 32% of all supermarket spending from its immediate Jandakot/Glen Iris catchment and 5% of the total catchment supermarket spending.
- Would result in minor sales impacts on the surrounding existing supermarket-based centre network.

Existing Glen Iris / Berrigan Drive Centre

The current retail activity along Berrigan Drive does not perform the role of a local centre.

Only 300sqm (8%) of the 3,900sqm of existing commercial activity along Berrigan Drive currently accommodate retail businesses which trade to a local catchment. The remaining activity (92%) predominantly trades as a showroom centre with a business mix which trades to lower frequency trips and higher volumes of traffic.

A local centre in Glen Iris will complement the existing commercial activity in the vicinity rather than compete with it.

1 INTRODUCTION

1.1 Purpose

This paper provides a commercial and economic assessment on the potential for sustainable retail development opportunities resulting from the residential redevelopment of the former Glen Iris Golf Course.

1.2 Proposed Development

The residential redevelopment of the former Glen Iris Golf Course is estimated to create an additional 550 dwellings. The findings in this paper assess whether this redevelopment subsequently creates a sustainable development opportunity for a retail centre to serve the new (and existing) residents in the vicinity of the planned residential redevelopment.

1.3 Approach

The findings in this paper are derived from a robust consideration of market influences on the potential for the sustainable delivery of retail activity in Glen Iris, including:

1. Competitive Commercial Environment - The proximity, extent, accessibility, and role of the surrounding commercial activity centres network.

2. Consumer Markets – the delineation and definition of intended catchments, and the extent, growth, retail needs, and spending profiles of the intended resident market within those catchments. The extent, growth, and nature of retail spending profiles for any other non-residential markets.

3. Market Capacity – the overall retail spending capacity available to a potential retail centre. The potential for a retail centre to capture sales from existing centres/tenants, and subsequently the amount of floor space that potential retail sales could commercially sustain.

4. Development Opportunities – the implications of these commercial and market influences on the potential for delivery and sustainability of retail activity, and the commercial and policy implications associated with its delivery.

2 COMPETITIVE COMMERCIAL ENVIRONMENT

The existing and planned commercial activity centres network around Glen Iris will influence the potential for delivery of additional retail activity in the area. The proximity of existing and planned centres, their intended role/function, tenancy mix, and accessibility to resident catchments, will ultimately determine the potential to attract sufficient sales to attract businesses to a new centre.

The role of any activity centre is determined largely by the type and brand of its major or anchor tenant. A Discount Department Store (Kmart, Target, BigW) and/or Supermarket (Coles, Woolworths, IGA, Aldi, Farmer Jacks) network will ultimately determine the extent of a resident catchment for a centre but also the level of interest an operator may have in being attracted to a new centre/location.

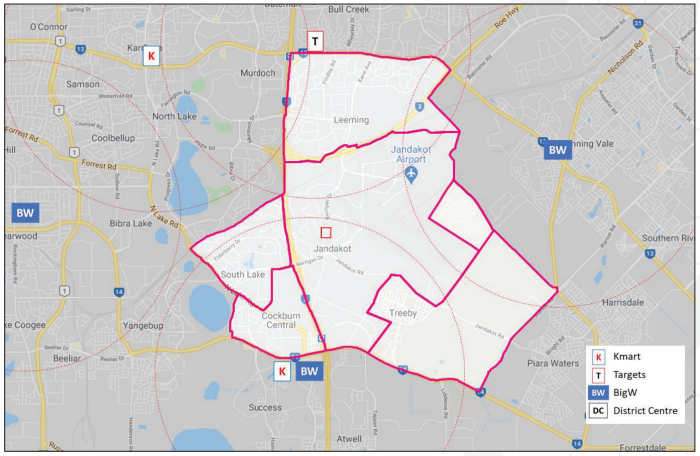
2.1 DDS Based Centres

DDS are typically located in Strategic Metropolitan, Secondary, and District Centres, and typically capture most of its sales/trade from a catchment of around 3.5km. The Glen Iris resident community already has access to all major Department Store operators, including:

- Big W and Kmart at Cockburn Central, 3.5 km to the south.
- Target at Bull Creek, 3.5 km to the north.
- BigW stores at Spearwood (Phoenix Park) to the west and Canningvale (Livingstone) to the East
- Kmart at Kardinya.

No other District Centres are planned in the area which would influence the delivery or performance of a local centre at Glen Iris.

DDS DISTRIBUTION MAP



2.2 Supermarket Based Centres

Neighbourhood Centres are typically anchored by full line supermarket(s), whereas Local Centres are typically anchored by a small supermarket or no supermarket at all.

Supermarket operators generate most of the customer traffic and sales for Neighbourhood Centres. Smaller convenience-based specialty retailers in these centres subsequently rely on their proximity to these major supermarkets for exposure to that customer traffic.

Subsequently, it is unlikely that a Neighbourhood Centre would be developed without a major supermarket operator, or a smaller Local Centre would be developed without a small supermarket operator. The smaller tenants in these centres would not be sustainable without the presence of a major supermarket tenant.

It is therefore reasonable to consider that the sustainability of a Neighbourhood Centre is dependent on the sustainability of a supermarket in that centre. If the supermarket can achieve sustainable retail sales, then it is subsequently expected that it will generate the customer traffic necessary for the smaller retailers to also be sustainable.

Analysis of supermarket-based Neighbourhood Centres reveals that they mostly follow a fixed development formula, based predominantly around the size of the supermarket that may be sustained in the catchment it is intended to serve. The sustainability of major supermarket chains is therefore critical to the successful analysis of activity centres and networks.

This paper focuses predominantly on the sustainability of potential supermarket activity to assess the sustainability of all potential retail activity in Glen Iris.

Two main supermarket operators dominate the supermarket and grocery market in Australia. Analysis of their distribution network shows a typical distance of 3 km between stores which means that Coles and Woolworths (which typically trade from 3,500 sqm stores) typically capture most of their sales from a 1.5km catchment.

IGA and independent grocers who operate under the IGA banner typically capture most of their sales from a smaller catchment of up to 1 km. IGA based stores range from IGA (750sqm-1,500sqm) and IGA express 250sqm-500sqm.

Aldi is a relative new introduction to the supermarket network. They typically comprise 1,500sqm stores and initially traded to a far wider catchment of up to 5km due to their smaller market share. However, as they continue to expand, the average distance between stores will become smaller, indicating that they may ultimately trade to a smaller catchment.

Spudshed is another recent introduction to the supermarket network. Spudshed currently has 17 stores operating in the Greater Perth Region. They typically trade from 2,000 sqm stores and draw trade from a much wider catchment. Up to 40% of all Spudshed sales are estimated to be driven by business spending and is therefore not derived from resident spending. In addition the Spudshed catchment is significantly more extensive than the proposed Glen Iris catchment with analysis of the Spudshed customer traffic indicating that only 15% of all Spudshed sales are being derived from the catchment designated for Glen Iris.

Ultimately, the viability of a centre is almost entirely based on its ability to sustain a major supermarket operator. Supermarkets currently capture 80% of all food and grocery spending by residents across Australia. The additional retailers such as butchers and bakers and newsagents ultimately rely on the foot traffic generated by a supermarket to capture the retail sales they need to remain viable.

In short, if the supermarket can be delivered and sustained in an area, a supermarket-based centre is likely to be viable.

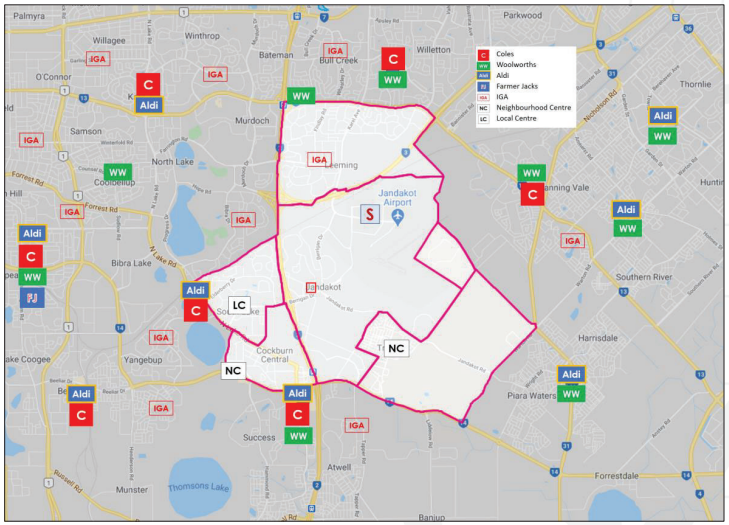
2.3 Supermarket Network

There is currently an estimated 36,500 sqm of supermarket floor space available to residents in Glen Iris. The closest supermarkets include:

- Spudshed in Jandakot – 3 km east of Glen Iris
- IGA in Leeming – 3 km north of Glen Iris
- Coles and Aldi at South Lake – 4.4 km west of Glen Iris
- Coles, Woolworths and Aldi at Cockburn Central – 4.4 km south of Glen Iris
- Ales supermarket at Yangebup – 4.5 km south of Glen Iris

No full line supermarket is currently operating within 4 km of Glen Iris. No existing supermarket-based centres currently operate within 4 km of Glen Iris. The nearest small supermarket-based centre is located 3km from the centre of the planned residential redevelopment of Glen Iris. Spudshed is located within the study area but is a standalone operator (not part of a larger centre).

SUPERMARKET DISTRIBUTION MAP



It is therefore reasonable to expect that Glen Iris residents will access these supermarket-based centres for most of their day-to-day food/grocery and convenience goods.

Proposed Centres

Treeby

An additional 3,500 sqm of supermarket floor space is also planned for Treeby, 3.8 km south of Glen Iris.

Berrigan Quarter

Berrigan Quarter is a Local Centre located 2.5 km west of Glen Iris. It has previously accommodated an IGA supermarket, but this store has recently closed. The closure of this store is thought to be influenced primarily on the introduction of an Aldi store at South Lake less than 2 km west of Berrigan Quarter. The loss of the Berrigan Quarter supermarket has meant that Glen Iris residents must travel even further for their supermarket trips.

It is unlikely that Berrigan Quarter will accommodate a supermarket operator in the future. However, modelling has considered the potential for part of this former supermarket space to be used as supermarket/grocer in the future.

The addition of these proposed centres means that Glen Iris residents will have access to a forecast supermarket floor space of 42,750 sqm.

SUPERMARKET DISTRIBUTION TABLE

		Supermarkets (Floor space (sqm)						
Centre Name	**Centre Type**	**Coles**	**WW**	**Aldi**	**IGA**	**Other**	**Proposed**	**Total Supermarket Floor space**
Cockburn Central	SMC	3,500	3,500	1,500				8,500
Ale	NC					2,500		2,500
South Lake	NC	3,500		1,500				5,000
Bull Creek	NC		3,500					3,500
Willeton	NC	3,500	3,500					7,000
Livingstone	DC	3,500	3,500					7,000
Spudshed (Jandakot)	LC					2,000		2,000
Atwell	LC				1,000			1,000
Bibra Lake	LC				1,000			1,000
Leeming	LC				1,000			1,000
Proposed Berrigan Quarte	*LC*						*750*	750
Proposed Treeby	*NC*						*3,500*	3,500
All Centres		**14,000**	**14,000**	**3,000**	**3,000**	**4,500**	**4,250**	**42,750**

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2.4 Glen Iris Centre/Berrigan Drive

Commercial activity is currently located on either side of Berrigan Drive adjacent to the Dean Road and Jandakot Road intersection. The retail activity in these centres is contained within 3,900sqm of building floor space.

Glen Iris Centre / Berrigan Quarter	Approximate Floor space (sqm)
North side	2,400 sqm
South side	1,500 sqm
Total	3,900 sqm

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Activity type	Indicative Floor space (sqm)	Contribution of Total Floor space
Medical	2,600 sqm	67%
Retail and Hospitality	300 sqm	8%
Retail Services	500 sqm	13%
Non-Retail	200 sqm	5%
Vacant	300 sqm	8%
Total	**3,900 sqm**	**100%**

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This centre does not perform the role of a convenience-based local centre serving the immediate local population. It is positioned on a high-volume road intersection to cater for passing trade and its business mix caters/trades predominantly to low frequency customer traffic more like a showroom retail centre. Whilst the floor space allocated to these centres may seem to be capable of supporting a small supermarket, their configuration and layout is not conducive to the provision of a small compact local convenience-based centre.
With only 300sqm of retail floor space allocated to this centre and not anchored by a supermarket, the Glen Iris / Berrigan Drive Centre is subsequently not considered to form part of this analysis.

2.5 Accessibility

Accessibility between Glen Iris and surrounding communities and centres initially appears to be constrained by a range of substantially developed infrastructure, including:

- Roe Highway and Railway to the north - isolating Glen Iris from Leeming
- Kwinana Freeway to the west - isolating Glen Iris from South Lake and Cockburn Central

However, residents in Glen Iris still enjoy relatively easy access to centres in these locations due to:

- Direct grade separated access over the Kwinana Freeway via Berrigan Drive to South Lake
- Direct grade separated access over Roe Highway and railway via Berrigan Drive/Karel Ave

SUPERMARKET/CENTRE DISTANCES BY CATCHMENT

	Distance (km)					
Centre Name	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby
Cockburn Central	4.4	4.4	4.7	0.5	7.8	3.4
Ale	4.3	4.3	3.2	2.5	7.4	6.6
South Lake	4.4	4.4	1.4	3.6	7.8	6.8
Bull Creek	5.2	5.2	7.6	8.9	2.1	9.1
Willeton	5.5	5.5	10.6	11.3	2.6	9.5
Liv ingstone	10.3	10.3	10.4	10.4	6.2	8.5
Spudshed (Jandakot)	3.0	3.0	4.7	6.4	2.7	5.6
Atwell	5.1	5.1	5.6	2.8	8.4	2.9
Bibra Lake	8.3	8.3	4.6	6.8	4.8	10.0
Leeming	3.0	3.0	6.4	8.1	1.2	7.2
Proposed Berrigan Quart	1.8	1.8	0.9	3.5	6.7	5.0
Proposed Treeby	3.8	3.8	5.4	3.7	6.6	0.3

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2.6 Opportunities/Catchments

This section considers the potential for attracting a supermarket operator to Glen Iris given the current and future supermarket operators influencing the catchment. Based on the location and distribution of supermarket-based centres in and around Glen iris, there may be a potential for a supermarket-based centre in Glen Iris given the lack of a major supermarket operator in Glen Iris, and Leeming.

- Woolworths has a strong presence to the north (Bull Creek and Willetton) although they are still over 5km from the Glen Iris redevelopment.
- Coles has a strong presence to the south (Cockburn and South Lake) although they are still over 4km away from the Glen Iris redevelopment.
- IGA has a small presence in locations that are not readily accessible to Glen Iris residents (except for IGA Leeming which is the closest supermarket to the Glen Iris Redevelopment) 3km away from the Glen Iris redevelopment.

The existing supermarket network provides sufficient evidence to consider the following development opportunities.

1. Opportunity 1 - Full line supermarket-based neighbourhood centre.
2. Opportunity 2 - Small supermarket based local centre.

Subsequent sections of this paper will assess the implications associated with each of these potential development opportunities.

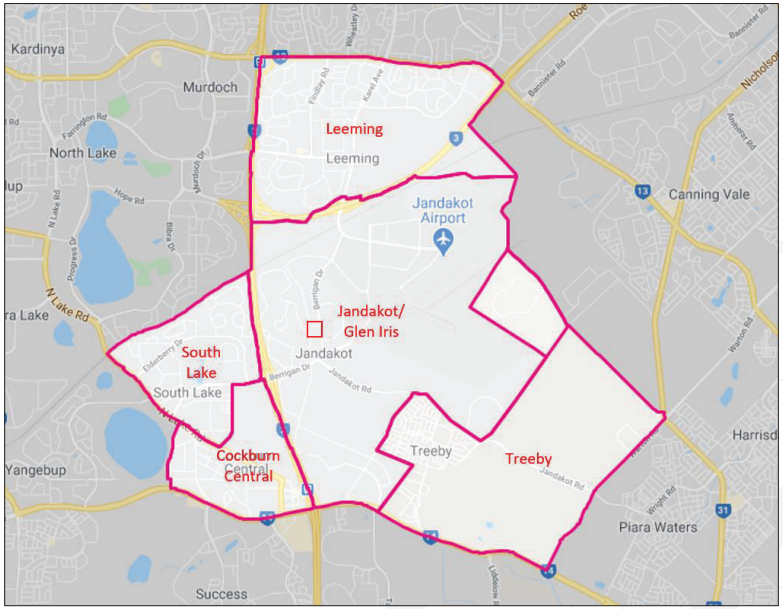
Catchments

It is reasonable to expect that any supermarket-based centre proposed for Glen Iris would realistically expect to capture most of its sales from Glen Iris, Jandakot, Leeming, South Lake, Cockburn Central and Treeby.

The economic viability of a potential centre in Glen Iris will therefore be dependent on the extent, nature, needs and profiles of the residents in these locations.

The Jandakot and Glen Iris redevelopment area effectively represent the same area. However, for the purposes of this analysis they will be reported separately to show the reliance and influence the new development may have on the sustainability of any future centre.

CATCHMENT MAP



Remplan/ Mapbuilder

3 CONSUMER MARKETS

This section assesses the extent, nature, and needs of the communities within the intended resident catchment for a potential neighbourhood or local centre in Glen Iris. It also assesses the potential to draw sales from other non-residential markets.

3.1 Resident Population/Dwellings

The localities forming the main resident catchment area for Glen Iris was reported to contain nearly 22,000 usual residents in 2016. The usual resident population of the catchment is estimated to have increased by nearly 3,000 residents (average of nearly 600 residents p.a.) to reach almost 24,900 residents by 2021.

The usual resident population in the main resident catchment is forecast to increase to nearly 41,100 usual residents by 2041, based on forecasts for continued growth of over 1,000 new residents p.a. over the next 10 years. Thereafter, growth is forecast to slow to under 740 residents p.a. to 2036, and to 375 residents p.a. to 2041. These figures include the planned Glen Iris redevelopment which is expected to introduce 1,485 new residents in 550 new dwellings by 2036.

This forecast population base reflects an average household size of 2.7 persons. The 2016 Census recorded a current average household size of 2.9 persons for the Jandakot suburb. The smaller household size used for Glen Iris redevelopment reflects a continual and gradual Australia wide trend to a decline in household sizes in established urban areas. A trend which is also expected to occur in Jandakot over the next 10 -15 years as the Glen Iris redevelopment occurs.

CURRENT and FORECAST POPULATION by CATCHMENT

								Average Growth	
Year	**Jandakot/ Glen Iris**	**Glen Iris GC**	**South Lake**	**Cockburn Central**	**Leeming**	**Treeby**	**All Catchments**	**per census**	**p.a.**
2016	2,766	-	5,862	1,569	10,722	1,003	**21,922**	-	-
2021	2,824	-	6,009	2,005	10,776	3,272	**24,886**	2,964	593
2026	2,973	400	6,159	3,698	10,829	5,849	**29,908**	5,023	1,005
2031	3,181	950	6,313	5,085	10,884	8,979	**35,392**	5,483	1,097
2036	3,383	1,485	6,471	6,218	10,938	10,605	**39,100**	3,708	742
2041	3,491	1,485	6,632	7,194	10,993	11,182	**40,977**	1,877	375
2021-2041	**667**	**1,485**	**624**	**5,188**	**217**	**7,910**	**16,091**	**4,023**	**805**

Id forecast (2020)

The catchment current equates to 20% of the total City of Cockburn resident population. Over the next 20 years, resident population growth in the main resident catchment will represent 35% of the total planned growth in the City of Cockburn. Ultimately the population in the main resident catchment will equate to nearly a quarter of all residents in the City of Cockburn.

CURRENT and FORECAST POPULATION

Year	***City of Cockburn***	***All Catchments***	***Catchment as % Cockburn Population***
2016	*108,770*	*21,922*	*20%*
2021	*123,203*	*24,886*	*20%*
2026	*137,709*	*29,908*	*22%*
2031	*151,176*	*35,392*	*23%*
2036	*161,479*	*39,100*	*24%*
2041	*169,689*	*40,977*	*24%*
2021-2041	**46,486**	**16,091**	**35%**

Id forecast (2020)

3.2 Resident Demographics

Analysis of the socio-economic characteristics for these catchments will influence the retail spending profile and retail spending capacity available in the main resident catchment.

- The suburbs of Jandakot and Leeming share similar demographics characteristics and are reported as a single entity.
- The suburbs of South lake and Cockburn Central share similar demographic characteristics and are reported as single entity.

Analysis of these socio-economic profiles/characteristics for each of the communities in the main resident catchment reveals:

Migration Profiles

Jandakot/Leeming
- More established catchment.
- More residents living at the same address as 1 year ago.
- More residents living at same address as 5 years ago.

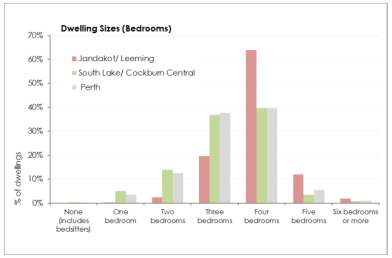
South Lake/Cockburn Central
- Developing catchment.
- Resident migration consistent with Perth averages.

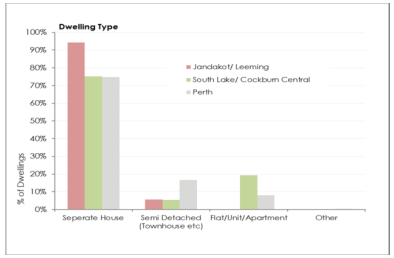
Dwelling Profiles

Jandakot/Leeming
- More separate dwellings.
- Less semidetached dwellings.
- Less 2- and 3-bedroom dwellings.
- More 4-, 5- and 6-bedroom dwellings.

South Lake/Cockburn Central
- More apartments.
- More 1- and 2-bedroom dwellings.
- Less 4- and 5-bedroom dwellings.

DWELLING PROFILES





Personal Profiles

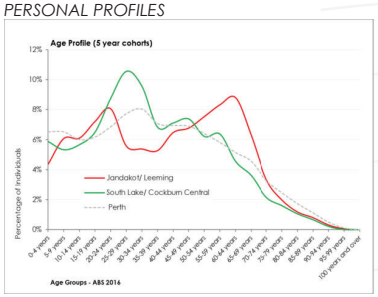
Jandakot/Leeming

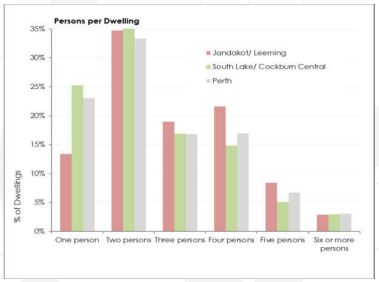
- Average age of 39.6 years – 5% older than Perth averages.
- Less children aged 0-9 years and fewer adults aged 25 years-44 years.
- More young adults aged 14-25 years and 50-69 years.
- More families with children and couples with no children.
- Average household size of 2.9 persons - 9% larger than Perth averages.
- More 3, 4 and 5 person households.

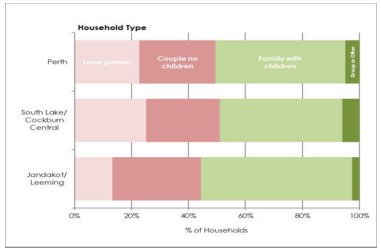
South Lake/Cockburn Central

- Average age of 35.6 years – 5% younger than Perth.
- Less children aged 0-14 years.
- More adults aged 20-24 years.
- Family sizes consistent with Perth averages.
- Average household size of 2.5 persons - 5% smaller than Perth averages.
- more 1 and 2 person households.

PERSONAL PROFILES







Economic Profiles

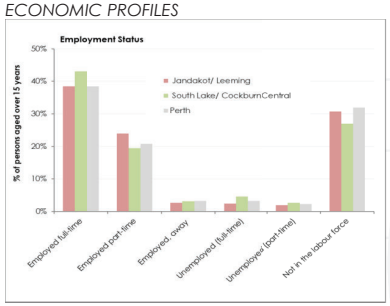
Jandakot/Leeming

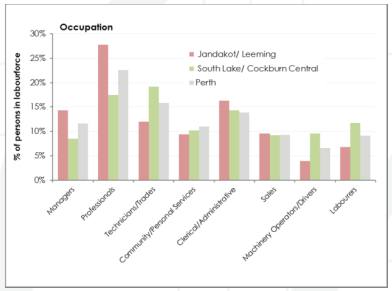
- Less residents employed full time and fewer residents in the labourforce.
- More residents employed part time.
- Average personal incomes 7% above Perth averages.
- Average of 2.3 incomes per household - 12% above Perth averages.
- Average household incomes 21% above Perth averages.

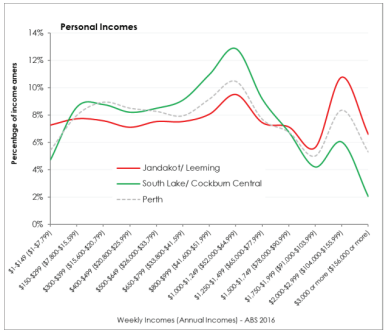
South Lake/Cockburn Central

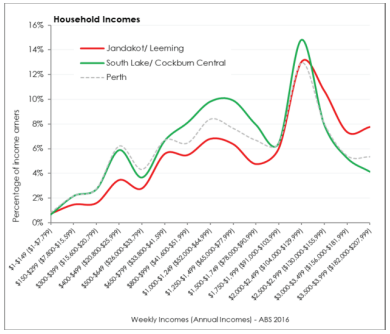
- More residents employed full time.
- Fewer residents employed part time and fewer residents in the labourforce.
- Average personal incomes 10% lower than Perth averages.
- Average of 2.1 incomes per household - 2% below Perth averages.
- Average household incomes 14% below Perth averages.

ECONOMIC PROFILES









Financial Commitment Profiles

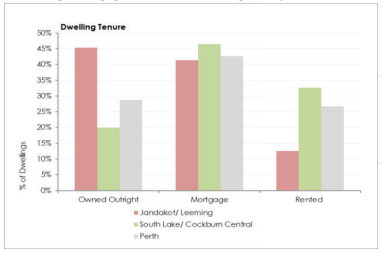
Jandakot/Leeming

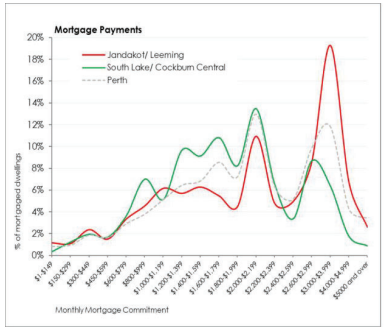
- Significantly more dwellings owned outright without mortgage.
- Significantly less rented dwellings.
- Average mortgage repayments 4% above Perth averages.
- Average rent 21% above Perth averages.

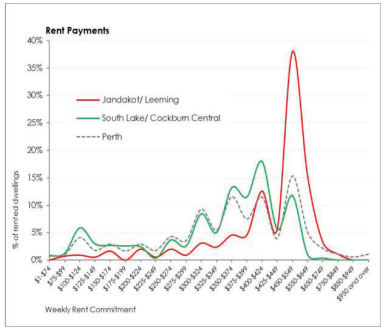
South Lake/Cockburn Central

- Less dwellings owned outright.
- More dwellings with mortgage.
- More rented dwellings.
- Average mortgage repayments 14% below Perth averages.
- Average rent 10% below Perth averages.

FINANCIAL COMMITMENT PROFILES







3.3 Resident Retail Spending Profile

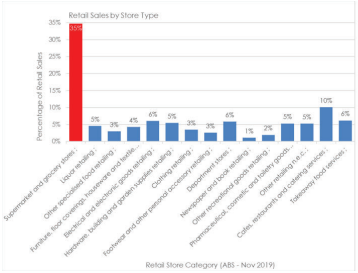
The estimated retail spending profiles for small areas across Australia can be extrapolated from a range of relevant data sources including:

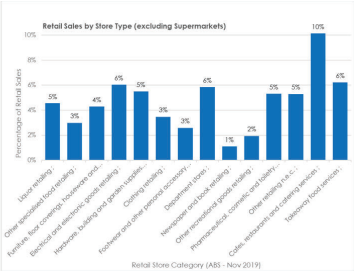
- Retail Trade, Australia - 8501.0 (ABS monthly)
- Household Expenditure Survey, Australia – 65300.0 (ABS 2015/16)
- Consumer Price Index, Australia – 6401.0 (ABS monthly)
- Estimated Resident Population – 3101.0 (ABS Quarterly)
- Population and Household Census (ABS 2016)

The analysis of these data sources highlights several key spending patterns throughout Australia, including:

- Food/grocery retailers capture 41% of all resident retail spending.
    - 82% of this spending is captured by supermarkets.
    - 18% of this spending is captured by non-supermarket food/grocery retailers.
- Department Stores and DDS capture 6% of all resident retail spending (or 13% of all non-food/grocery retail spending),
- Cafes and restaurants capture 10% of all resident retail spending.
- Takeaway outlets capture 6% of all resident retail spending.

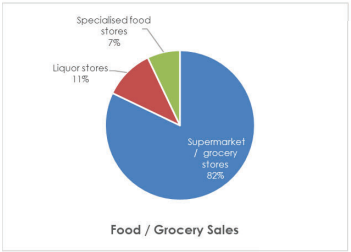
AVERAGE RETAIL SALES BY STORE TYPE

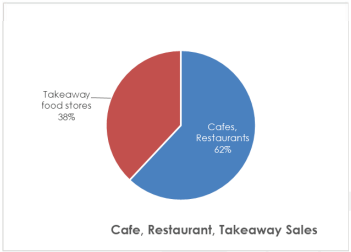




Retail Sales (ABS 2020)

AVERAGE RETAIL SALES BY STORE TYPE BY RETAIL CATEGORY





Retail Sales (ABS 2020)

These figures highlight the extent to which supermarkets dominate the capture of the food and grocery spending market in Australia. To further compound the limited spending available for non-supermarket food and grocery stores, the limited non supermarket food and grocery spending is mostly captured during the same trip to the supermarket which means that food and grocery retailers in supermarket-based centres capture most of this non supermarket-based food and grocery spending. It therefore follows that only a small percentage of this non supermarket food and grocery spending is available for local centres/stores which are not anchored by a supermarket.

Overall, the demographic profiles for the main resident catchment indicates an average supermarket spending of:

- $5,263 per capita in Jandakot - 16% above Perth average spending
- $5,209 per capita in Leeming - 15% above Perth average spending
- $4,058 per capita in South Lake - 10% below Perth average spending
- $4,016 per capita in Cockburn Central – 11% below Perth average spending

AVERAGE RETAIL SPENDING PER CAPITA PROFILE BY CATCHMENT BY RETAIL CATEGORY

Retail Store Category	Jandakot/ Glen Iris	South Lake	Cockburn Central	Leeming	Perth Average
Supermarket and Grocery sto	$5,263	$4,058	$4,016	$5,209	$4,526
Liquor	$691	$532	$527	$681	$585
Other Food	$407	$329	$327	$401	$361
Food and Grocery	**$6,362**	**$4,920**	**$4,871**	**$6,291**	**$5,472**
Household Goods	$3,016	$2,255	$2,229	$2,975	$2,538
Clothing & Fashion	$1,021	$700	$691	$991	$800
Department Stores	$1,113	$748	$738	$1,077	$866
Other	$1,735	$1,409	$1,399	$1,714	$1,528
Café, Restaurant, Takeaway	**$2,472**	**$1,596**	**$1,566**	**$2,428**	**$1,915**
Total Retail	**$15,720**	**$11,628**	**$11,494**	**$15,476**	**$13,119**

Household Expenditure Survey (ABS 2019)/Population and Household Census (ABS 2016) Retail Sales (ABS 2020)

VARIATION IN RETAIL SPENDING PROFILES to PERTH AVERAGES

Retail Store Category	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming
Supermarket and Grocery sto	16.3%	16.3%	-10.3%	-11.3%	15.1%
Liquor	18.1%	18.1%	-9.1%	-9.9%	16.2%
Other Food	12.8%	12.8%	-8.7%	-9.3%	11.2%
Food and Grocery	**16.3%**	**16.3%**	**-10.1%**	**-11.0%**	***15.0%***
Household Goods	18.8%	18.8%	-11.2%	-12.2%	*17.2%*
Clothing & Fashion	27.7%	27.7%	-12.5%	-13.6%	23.9%
Department Stores	28.6%	28.6%	-13.6%	-14.8%	24.5%
Other	13.6%	13.6%	-7.7%	-8.4%	*12.2%*
Café, Restaurant, Takeaway	**29.1%**	**29.1%**	**-16.7%**	**-18.2%**	***26.8%***
Total Retail	**19.8%**	**19.8%**	**-11.4%**	**-12.4%**	***18.0%***

Household Expenditure Survey (ABS 2019)/Population and Household Census (ABS 2016) Retail Sales (ABS 2020)

3.4 Resident Retail Spending Capacity

Based on these resident retail spending profiles for the catchment localities the aggregate resident supermarket spending capacity generated by residents within the main resident catchment is estimated to be $120M p.a. in 2021, including $15M in Jandakot, $56M p.a. in Leeming and $24M p.a. in South Lake.

Supermarket spending in the main resident catchment is forecast to grow by nearly $25M p.a. by 2026 and by an additional $78M p.a. by 2041.

New residents in the Glen Iris GC redevelopment are estimated to generate $2.1M p.a. in supermarket spending by 2026 and $7.8M p.a. when all resident dwellings are developed and occupied.

AGGREGATE SUPERMARKET SPENDING CAPACITY BY CATCHMENT BY YEAR

Year	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
2016	$14.6	$0.0	$23.8	$6.3	$55.9	$5.3	**$105.8**
2021	$14.9	$0.0	$24.4	$8.1	$56.1	$17.2	**$120.7**
2026	$15.6	$2.1	$25.0	$14.9	$56.4	$30.8	**$144.8**
2031	$16.7	$5.0	$25.6	$20.4	$56.7	$47.3	**$171.7**
2036	$17.8	$7.8	$26.3	$25.0	$57.0	$55.8	**$189.6**
2041	$18.4	$7.8	$26.9	$28.9	$57.3	$58.9	**$198.1**

Household Expenditure Survey (ABS 2019)/Population and Household Census (ABS 2016) Retail Sales (ABS 2020)

A full line supermarket on average can capture $35M p.a. meaning that the forecast additional growth in catchment spending alone over the next 20 years is likely to generate sufficient supermarket sales to support up to the equivalent of two extra full line supermarkets in the catchment.

3.5 Other Retail Spending Markets

The limited employment generation, passing trade and visitor accommodation and attractions in and around Glen Iris, limits the likelihood of a retail centre generating significant sales from these other non-resident consumer markets.

4 RETAIL MARKET CAPACITY

This section assesses the influences of the current and planned centres network, resident needs and spending capacity within the resident catchment to determine the ability of a potential Neighbourhood Centre or Local Centre to be developed sustainability within the Glen Iris development.

It does this by determining the likely market capture of annual supermarket spending that a supermarket of a particular size is likely to capture from each catchment and comparing it to the average volume of retail sales thought to be needed to remain viable in the market.

This paper considers the development potential for:

- Opportunity 1 - a full line (3,500 sqm) supermarket-based Neighbourhood Centre.
- Opportunity 2 – a small supermarket (1,500 sqm) based Local Centre.

4.1 Full line Supermarket Opportunity

The modelling of the full line supermarket opportunity shows that a 3,500 sqm supermarket at Glen Iris could expect to capture 14% of the total resident catchment supermarket spending including:

- 70% of supermarket spending generated by Jandakot/Glen Iris/Glen Iris GC residents.
- 9% of supermarket spending generated by South Lake residents.
- 6% of supermarket spending generated by Leeming residents.
- 5% of supermarket spending generated by Treeby residents.
- 2% of supermarket spending generated by Cockburn Central residents.

In 2026, this market capture would produce supermarket sales of $19.6M p.a. at an average sales productivity of $5,600/sqm p.a. Up to 63% of all supermarket sales would expect to be captured from Jandakot/Glen Iris (56%) and the early residents in the redevelopment (7%) as well as 17% of sales from Leeming residents and 11% from South Lake residents.

	Catchment						
2026	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	**Total**
Spending Capacity ($M p.a.)	$15.6	$2.1	$25.0	$14.9	$56.4	$30.8	**$144.8**
Market Capture by Glen Iris (%)	70%	70%	9%	2%	6%	4%	**14%**
Sales Captured ($M p.a.)	$10.9	$1.5	$2.2	$0.3	$3.3	$1.4	**$19.6**
Contribution to Sales (%)	56%	7%	11%	2%	17%	7%	**100%**

Supermarket Size	**3,500**
Sales Productivity ($/sqm p.a.)	**$5,607**

Running the model without Treeby Neighbourhood Centre by 2026 shows that the sales at a potential centre in Glen Iris increase by $1.8M p.a. an increase of total sales to $21.4M p.a.

By 2031, the market capture would be responsible for generating $23.3 M p.a. at an average sales productivity of $6,700/sqm p.a. These sales would rely mainly on the immediate Jandakot/Glen Iris catchment (65%) including new residents forming the redevelopment (contributing 15%). The continued redevelopment of Glen Iris correlates to a decrease in reliance on Leeming (15%) and South Lake (10%) and Treeby (9%) for sales.

Running the model without Treeby Neighbourhood Centre by 2031 shows that the sales at a potential centre in Glen Iris increase by $2.5M p.a. an increase of total sales to $25.8M p.a.

2031	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
Spending Capacity ($M p.a.)	$16.7	$5.0	$25.6	$20.4	$56.7	$47.3	**$171.7**
Market Capture by Glen Iris (%)	70%	70%	9%	2%	6%	4%	**14%**
Sales Captured ($M p.a.)	$11.7	$3.5	$2.3	$0.4	$3.4	$2.1	**$23.3**
Contribution to Sales (%)	50%	15%	10%	2%	14%	9%	**100%**

Supermarket Size	**3,500**
Sales Productivity ($/sqm p.a.)	**$6,667**

By 2036, the market capture could produce $26.6 M p.a. at an average sales productivity of nearly $7,600/sqm p.a. Residents forming Jandakot/Glen Iris (47%) and the redevelopment of Glen Iris (20%) are responsible for contributing over two thirds of all supermarket sales.

It may be reasonably expected that Treeby will be developed by 2036.

2036	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
Spending Capacity ($M p.a.)	$17.8	$7.8	$26.3	$25.0	$57.0	$55.8	**$189.6**
Market Capture by Glen Iris (%)	70%	70%	9%	2%	6%	4%	**14%**
Sales Captured ($M p.a.)	$12.4	$5.5	$2.3	$0.5	$3.4	$2.5	**$26.6**
Contribution to Sales (%)	47%	21%	9%	2%	13%	9%	**100%**

Supermarket Size	**3,500**
Sales Productivity ($/sqm p.a.)	**$7,597**

By 2041, the sales potential does not increase dramatically suggesting that the ultimate sales potential for the full line supermarket is about $27.3M p.a. at an average sales productivity of over $7,800sqm/p.a. Sales contribution by catchment remains steady as two thirds of all supermarket sales are captured by the immediate catchment.

	Catchment						
2041	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
Spending Capacity ($M p.a.)	$18.4	$7.8	$26.9	$28.9	$57.3	$58.9	**$198.1**
Market Capture by Glen Iris (%)	70%	70%	9%	2%	6%	4%	**14%**
Sales Captured ($M p.a.)	$12.8	$5.5	$2.4	$0.6	$3.4	$2.6	**$27.3**
Contribution to Sales (%)	47%	20%	9%	2%	12%	10%	**100%**

Supermarket Size	**3,500**
Sales Productivity ($/sqm p.a.)	**$7,793**

These annual sales figures are below the average thought to be attractive to a major supermarket operator. However, the opportunity to capture sales from competitors or create a saturation distribution strategy, or even a desire to keep a competitor out of a particular market may result in these lower-than-average sales figures being sufficient to warrant consideration.

4.2 Small Supermarket Opportunity

The modelling of the small supermarket opportunity over time reveals that a small supermarket has the potential to capture 5% of the total resident catchment supermarket spending including 32% of Jandakot/Glen Iris and Glen Iris GC redevelopment residents. The smaller supermarket option has less draw power and trade to a more localised catchment. It is subsequently estimated to generate between 1%-2% of the market capture from the other communities in the main resident catchment.

Based on these capture rates, in 2026, a small supermarket has the potential to generate $7.2M p.a. at an average sales productivity of $4,700/sqm p.a.

Running the model without Treeby Neighbourhood Centre shows that the sales at a potential centre in Glen Iris increase by $600,000 p.a. an increase of total sales to $7.7M p.a.

2026	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
Spending Capacity ($M p.a.)	$15.6	$2.1	$25.0	$14.9	$56.4	$30.8	**$144.8**
Market Capture by Glen Iris (%)	32%	32%	2%	0%	1%	1%	**5%**
Sales Captured ($M p.a.)	$5.0	$0.7	$0.4	$0.1	$0.6	$0.3	**$7.1**
Contribution to Sales (%)	71%	10%	6%	1%	9%	4%	**100%**

Supermarket Size	**1,500**
Sales Productivity ($/sqm p.a.)	**$4,721**

By 2031, the increase in supermarket spending within the main resident catchment can generate $8.5M p.a. in retail sales at an average sales productivity of $5,700/sqm p.a. As expected, a smaller supermarket would rely mainly on the immediate Jandakot/Glen Iris community generating (82%) of all sales Including 19% of all sales contributed from new residents in the redevelopment area.

Running the model without Treeby Neighbourhood Centre shows that the sales at a potential centre in Glen Iris increase by $700,000 p.a. an increase of total sales to $9.2M p.a.

2031	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
Spending Capacity ($M p.a.)	$16.7	$5.0	$25.6	$20.4	$56.7	$47.3	**$171.7**
Market Capture by Glen Iris (%)	32%	32%	2%	0%	1%	1%	**5%**
Sales Captured ($M p.a.)	$5.4	$1.6	$0.4	$0.1	$0.7	$0.4	**$8.5**
Contribution to Sales (%)	63%	19%	5%	1%	8%	5%	**100%**

Supermarket Size	**1,500**
Sales Productivity ($/sqm p.a.)	**$5,688**

By 2036, the increased in supermarket spending should be capable of producing sales of $9.9M p.a. at an average sales productivity of $6,600/sqm p.a. These sales are still predicated on capturing 82% of all sales from Jandakot/Glen Iris (58% of all sales) and Glen Iris GC (25%).

It may be reasonably expected that Treeby will be developed by 2036.

2036	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
Spending Capacity ($M p.a.)	$17.8	$7.8	$26.3	$25.0	$57.0	$55.8	**$189.6**
Market Capture by Glen Iris (%)	32%	32%	2%	0%	1%	1%	**5%**
Sales Captured ($M p.a.)	$5.7	$2.5	$0.5	$0.1	$0.7	$0.5	**$9.9**
Contribution to Sales (%)	58%	25%	5%	1%	7%	5%	**100%**

Supermarket Size	**1,500**
Sales Productiv ity ($/sqm p.a.)	**$6,585**

Finally, by 2041 a 1,500sqm supermarket is forecast to ultimately be capable of generating $10.1M p.a. at an average sales productivity of $6,750/sqm p.a. maintaining the same reliance on the immediate resident catchment.

2041	Jandakot/ Glen Iris	Glen Iris GC	South Lake	Cockburn Central	Leeming	Treeby	Total
Spending Capacity ($M p.a.)	$18.4	$7.8	$26.9	$28.9	$57.3	$58.9	**$198.1**
Market Capture by Glen Iris (%)	32%	32%	2%	0%	1%	1%	**5%**
Sales Captured ($M p.a.)	$5.9	$2.5	$0.5	$0.1	$0.7	$0.5	**$10.1**
Contribution to Sales (%)	58%	25%	5%	1%	7%	5%	**100%**

Supermarket Size	**1,500**
Sales Productiv ity ($/sqm p.a.)	**$6,743**

4.3 Implications

Analysis suggests that both the full line supermarket-based neighbourhood centre opportunity or the small supermarket based local centre opportunities may ultimately be viable as part of the Glen Iris redevelopment. However, it is more likely that a smaller supermarket-based centre presents the best commercial opportunity for the development.

The forecast sales potential for the small supermarket are expected to reach industry averages by 2036. However, it is not unusual for a smaller centre to be developed slightly ahead of sales expectations to establish trading patterns and shopper loyalty as the immediate catchment develops, meaning that the small supermarket option could be developed between 2026-2031.

The figures also indicate that Treeby is expected to generate sufficient dwellings, population, and supermarket spending to ultimately support two supermarkets. Whilst the planning for Treeby includes the potential for a single supermarket-based centre, the introduction of a second supermarket at Treeby would have the potential to impact sales forecast for Glen Iris.

5 DEVELOPMENT OPPORTUNITIES

This section considers the implications for the supermarket development on the overall centre type sustainable within the Glen Iris development.

Large supermarkets (3,500sqm) are typically able to sustain a centre which contains between 10 and 20 shops (totalling between 1,000sqm and 2,000sqm) creating a neighbourhood centre of between 4,500sqm and 5,500sqm). There are larger and smaller centres of this nature – but on average most neighbourhood centres fall within this size range.

Smaller supermarkets between 750sqm and 1,500sqm are typically able to sustain between 5 and 10 shops (totalling between 750sqm and 1,000sqm) creating a small neighbourhood centre of between 1,500sqm and 2,500sqm. Despite the policy demand for the allocation of local centres of between 500sqm and 1,000sqm, it is increasingly rare to see a local centre with 5 to 10 shops developed without a small supermarket to anchor it. A local centre without a supermarket operator is often more likely to comprise a single café/deli of up to 250sqm.

	Large Supermarket based Centre	Small Supermarket based Centre
Supermarket	3,500sqm	750sqm – 1,500sqm
Shops	10 - 20	5 - 10
Shop Floorspace (sqm)	1,000 sqm – 2,000sqm	750sqm – 1,000sqm
Total	4,500sqm – 5,500sqm	1,500sqm – 2,500sqm

These development typologies are important when considering the size and nature and sustainability of a centre planned to be introduced into the activity centres network. Planning for activity centres in a network without consideration for the likely commercial and development demand as well as the market demand may lead to unrealistic expectations in relation to future delivery of retail activity in the node. Not all retail centres follow these typologies, however, the further they depart from these models the greater the commercial risk to the sustainability of the centre.

5.1 Economic Impacts

Another important consideration in planning for the delivery of a Neighbourhood Centre is the impact that it may have on the performance of other centres. This section considers the economic impacts and implications for each development opportunity.

State Planning Policy 4.2 – Activity Centre – Perth and Peel require an economic test to be applied for:

- Existing centres - increase in size by more than 6,000sqm on their original allocated floor space assess the extent to which a new development may impact on the existing infrastructure and network.
- Proposed Centres – that have not or do not form part of the District, Local planning framework or Retail Needs Planning completed for the area.

A general rule of thumb (expected to be further endorsed by draft changes to the policy) is that 10% impact on the sales of a centre is considered a high impact while 5% impact is moderate and 2.5% is considered low impact.

The following assessments show the difference in sales at supermarkets in centres as if the planned centre were developed and not developed and consider the sales variation in the context of overall decrease in sales for the entire centre.

To compare the direct impacts of a centre on the network, the entire centre network is modelled for each year with and without the planned centre included in the network. This way the sales figures for the centre network can be assessed for sales growth from resident population growth.

5.2 Full Line Supermarket Impacts

In 2031 a full line supermarket (3,500sqm) opportunity capable of capturing $23.2M p.a. in sales at Glen Iris would effectively need to capture these sales from other surrounding centres, including:

- Cockburn Central $7.7M p.a. (6.8%) impact on annual sales
- Willetton $4.6M p.a. (5.1%) impact on annual sales
- South Lake $3.0M p.a. (5.2%) impact on annual sales

It should be noted that by 2031 all these supermarkets will be trading better than they are currently due to the forecast growth in resident population and subsequently resident retail spending capacity in the resident catchment.

It should also be noted that because a full line supermarket is expected to capture 70% of all new resident spending from the Glen Iris redevelopment – that 30% of all supermarket spending by new residents will therefore be expected to be captured by existing supermarkets in the centres network.

POTENTIAL SALES IMPACT by CENTRE – Full Line Supermarket Impacts

2031

	without centre		*with centre*		*Impact*	
Centre Name	**Estimated Annual Supermarket Sales (all sources including outside the catchments)**	**Estimated Required Sustainble Sales Productivity ($/sqm p.a.)**	**Estimated Annual Supermarket Sales (all sources)**	**Estimated Change in Required Sustainble Supermarket Sales Productivity ($/sqm p.a.)**	**Potential Supermarket Sales Impact ($M p.a.)**	**Potential Supermarket Sales Impact (%)**
Cockburn Central	$113.1	$13,303	$105.4	$12,396	-$7.7	-6.8%
Ale	$30.1	$12,054	$29.5	$11,789	-$0.7	-2.2%
South Lake	$58.5	$11,701	$55.5	$11,096	-$3.0	-5.2%
Bull Creek	$38.6	$11,035	$37.3	$10,668	-$1.3	-3.3%
Willeton	$89.9	$12,836	$85.3	$12,181	-$4.6	-5.1%
Livingstone	$83.8	$11,978	$81.4	$11,622	-$2.5	-3.0%
Spudshed (Jandakot)	$21.6	$10,814	$21.0	$10,512	-$0.6	-2.8%
Atwell	$19.1	$19,085	$19.0	$18,994	-$0.1	-0.5%
Bibra Lake	$8.0	$7,957	$7.9	$7,890	-$0.1	-0.8%
Leeming	$6.5	$6,452	$6.3	$6,275	-$0.2	-2.8%
Proposed Berrigan Quarter	$5.1	$6,810	$5.0	$6,621	-$0.1	-2.8%
Proposed Treeby	$32.3	$9,228	$29.9	$8,547	-$2.4	-7.4%
Competing Centres	**$506.6**	**$11,849**	**$483.3**	**$11,306**	**-$23.2**	**-4.6%**
Glen Iris (Subject Centre)	*$0.0*	*$0*	*$23.2*	*$6,633*	*$23.2*	*n/a*
All Centres	**$506.6**		**$506.6**		**$0.0**	

Taktics4 Retail Sales Model (2021)

5.3 Small Supermarket Impacts

In 2031 a smaller supermarket (1,500sqm) opportunity capable of capturing $8.7Mp.a. in sales at Glen Iris would effectively need to capture these sales from other surrounding centres, including:

- Cockburn Central $2.9M p.a. (2.6%) impact on annual sales
- Willetton $1.7M p.a. (1.9%) impact on annual sales
- South Lake $1.1M p.a. (1.9%) impact on annual sales

It should be noted that by 2031 all these supermarkets will be trading better than they are currently due to the forecast growth in resident population and subsequently resident retail spending capacity in the resident catchment.

It should also be noted that because a smaller supermarket is expected to capture 32% of all new resident spending from the Glen Iris redevelopment – that 68% of all supermarket spending by new residents will therefore be expected to be captured by existing supermarkets in the centres network.

POTENTIAL SALES IMPACT by CENTRE – Small Supermarket Impacts

2031

	without centre		*with centre*		*Impact*	
Centre Name	**Estimated Annual Supermarket Sales (all sources including outside the catchments)**	**Estimated Required Sustainble Sales Productivity ($/sqm p.a.)**	**Estimated Annual Supermarket Sales (all sources)**	**Estimated Change in Required Sustainble Supermarket Sales Productivity ($/sqm p.a.)**	**Potential Supermarket Sales Impact ($M p.a.)**	**Potential Supermarket Sales Impact (%)**
Cockburn Central	$113.1	$13,303	$110.1	$12,958	-$2.9	-2.6%
Ale	$30.1	$12,054	$29.9	$11,951	-$0.3	-0.8%
South Lake	$58.5	$11,701	$57.4	$11,483	-$1.1	-1.9%
Bull Creek	$38.6	$11,035	$38.2	$10,905	-$0.5	-1.2%
Willeton	$89.9	$12,836	$88.2	$12,597	-$1.7	-1.9%
Livingstone	$83.8	$11,978	$82.9	$11,849	-$0.9	-1.1%
Spudshed (Jandakot)	$21.6	$10,814	$21.4	$10,697	-$0.2	-1.1%
Atwell	$19.1	$19,085	$19.1	$19,050	$0.0	-0.2%
Bibra Lake	$8.0	$7,957	$7.9	$7,933	$0.0	-0.3%
Leeming	$6.5	$6,452	$6.4	$6,388	-$0.1	-1.0%
Proposed Berrigan Quarter	$5.1	$6,810	$5.1	$6,737	-$0.1	-1.1%
Proposed Treeby	$32.3	$9,228	$31.6	$9,016	-$0.7	-2.3%
Competing Centres	**$506.6**	**$11,849**	**$498.1**	**$11,651**	**-$8.5**	**-1.7%**
Glen Iris (Subject Centre)	*$0.0*	*$0*	*$8.5*	*$5,640*	*$8.5*	*n/a*
All Centres	**$506.6**		**$506.6**		**$0.0**	

Taktics4 Retail Sales Model (2021)

These results suggest that a small supermarket based local centre is less likely to cause an economic impact on surrounding centres network.

5.4 Commercial Implications

Given the current network framework and store distribution patterns in the area:

- It may be difficult to attract a full line supermarket operator (Coles or Woolworths) to Glen Iris. Coles and Woolworths both have a strong presence in the surrounding catchments.
- The forecast lower sales and sales productivity expectations would be likely to reduce the attractiveness together with the fact that some of these sales would be captured from existing stores in the network.
- Aldi is already located to the west and south of the catchment and is unlikely to be interested in a store in Glen Iris based on their current spatial planning and store rollout plans.
- This leaves the opportunity for an independent operator under the IGA banner to locate in the location.

5.5 Policy Implications

SPP 4.2 has a clear parameter in relation to the introduction of new centres.

It acknowledges that its responsibility predominantly lies with the allocation and spatial distribution of District centres and above. Neighbourhood Centres and Local Centres are more likely to be spatially allocated by the relevant Local Government Authority.

Neighbourhood Centres are more likely to be allocated during the District Structure Planning process, while Local Centres are more likely to be spatially allocated and assessed during the Local Structure Planning process.

Subsequently, it is likely that a Neighbourhood Centre allocated during the Local Structure Planning process would be less likely to be accepted as good and proper planning by the relevant planning authorities.

The potential impacts associated with a full line supermarket-based centre at Glen Iris would also make it less favourable at an authority level and be more likely to attract opposition and intervention at a competitor level as well as a LGA and State Planning Authority.

A Local Centre with a small supermarket-based centre is more likely to be acceptable by relevant Authorities, especially given the low impact results associated with the smaller centre size.

5.6 Summary/Recommendations

The analysis of the retail and consumer markets influencing the potential development of a centre at Glen Iris indicate that a small supermarket based local centre is the most suitable development opportunity. A small supermarket based local centre would be likely to comprise:

SMALL SUPERMARKET BASED CENTRE – Development Characteristics	
Supermarket	***1,500sqm***
Shops	*5 - 10*
Shop Floorspace (sqm)	*1,000sqm*
Total	***2,500sqm***

- This centre could expect to be trading prior to 2031.
- A centre of this size can be contained within an allocated commercially zoned parcel of land totalling 0.70Ha.
- The centre will rely on capturing 32% of all supermarket spending from its immediate Jandakot/Glen Iris catchment and 5% of the total catchment supermarket spending.
- These sales would contribute 83% of all supermarket sales to the centre.
- The comparative sales impact on surrounding existing supermarket-based centre network will be minor.

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