

Sutherland LGA

Supermarket and consumer trends review

July 2016

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Contents

Executive summary

Introduction

Section 1: Supermarket trends

- 1.1 Methodology
- 1.2 Supermarket provision
- 1.3 Comparison with other LGAs
- 1.4 Future population and supermarket floorspace growth
- 1.5 Retail expenditure per capita

Section 2: Consumer market research

- 2.1 Quantum analysis
- 2.2 Crosby Textor research

Section 3: Employment trends

- 3.1 Shortfall in retail jobs & jobs in general

Section 4: Taren Point - site potential

- 4.1 Taren point locality
- 4.2 Future supermarket supply

Section 5: Net community impacts

- 5.1 Adverse impacts of under-supply...
- 5.2 Potential time savings...

Appendix

Executive summary

Adverse impacts of supermarket under-supply...

- Congestion issues/deterrent effects – from supermarkets and car parks being too busy.
- Increased travel times/costs – due to congestion and shoppers bypassing smaller/inadequate supermarkets.
- Increased supermarket/retailer profitability – which can lead to a lack of reinvestment and a decline in customer service at a local level.
- Less job opportunities - limits the retail job opportunities for local residents and increases travel times for workers who need to leave LGA.
- Potential decline of non-centre employment precincts – due to lack of local amenities.

Small time savings add up...

- Quantum transactional data show that the average supermarket trip distance undertaken by Sutherland residents is around 120-200% greater than the average distance to their closest supermarket.
- This means that many residents are bypassing smaller, more proximate supermarkets because they do not provide a comprehensive range of grocery items.
- If just 10% of households were able to save 1 minute per trip for 10% of their annual supermarket trips as a result of better/more convenient access to supermarket facilities this would equate to time savings across the Shire of almost 60,000 minutes or more than 40 days.

Under-supply of supermarket floorspace...

- There is typically around 340 sq.m of supermarket floorspace per 1,000 residents across Australia. There is around 313 sq.m per 1,000 residents across Australia's capital cities, and around 338 sq.m per 1,000 residents, on average, if Sydney is excluded.
- There is around 286 sq.m of supermarket floorspace per capita across the Sutherland Shire, which is around 16% below the capital cities average (ex-Sydney).
- Around 33% of all supermarket floorspace is located within the Miranda and Caringbah activity centres – which are located just 2km from each other in the eastern part of the shire. Clearly, there is an imbalance in the provision of supermarket space within the Shire.
- The current under-provision of supermarket floorspace across Sutherland Shire equates to around 12,000 – 13,000 sq.m (which does not account for approved future developments).
- **Future demand for supermarket floorspace...**
- The Shire's population is projected to grow from 225,610 in 2015 to 264,230 by 2031. This growth of 38,600 persons by 2031 would be equivalent to around 13,000 sq.m of additional supermarket floorspace demand.
- This means a further 8 large supermarkets (above 3,000 sq.m) would be needed between now and 2031 in order for the Sutherland Shire to match the current average provision across Australian capital cities (ex-Sydney).
- There are only two large supermarkets approved across the Shire (at Woollooware and Kirrawee), as well as a proposed one at Kirrawee as well as two Aldi supermarkets which are much smaller – providing a limited range of items.

Lack of retail job opportunities...leads to greater unemployment.

- As at the 2011 Census, there were around 110,500 resident workers in the Sutherland Shire yet only 57,200 local jobs were available in the Shire.
- 20% of these local jobs are filled by workers from beyond the Shire, which means around 60% of Sutherland Shire resident workers leave the LGA every day for work.
- The number of jobs in the Sutherland Shire grew by around 4.8% between 2006 and 2011, yet retail jobs in the Shire declined by 1%.
- Retail trade is a key driver of the local economy, constituting around 16% of all local jobs as at 2011, the largest employing industry in the Shire. However, there was a net under-provision of retail jobs in the Sutherland Shire in 2011, with less retail jobs available in the Shire than employed residents in the retail industry.

Taren Point locality...

- Taren Point represents a highly suitable location for additional full-line supermarket facilities because of the significant escape expenditure from this locality at present; the large daily workforce (of around 11,000 workers); and the significant amount of latent demand existing already from drivers passing through the locality along Taren Point Road (in excess of 58,000 VPD).
- This would provide Shire residents the opportunity to link supermarket trips with a trip to work (or another trip beyond the Shire) and reduce specific/dedicated trips to supermarkets throughout the Shire.

Introduction

Introduction

Introduction

This report presents an assessment of supermarket trends across the Sutherland Shire and supermarket shopping behaviours of Sutherland Shire residents.

This report has been prepared on behalf of Woolworths Limited - a major employer in the Sutherland Shire, to assist Sutherland Shire Council with its future planning to enable new retail development to be provided that meet the needs of its constituents.

This report has been prepared to generally examine the broader supermarket environment across the Sutherland Shire but also to form part of the economic justification for a planning proposal for a new supermarket proposed at Taren Point.

MacroPlan Dimasi and Woolworths propose to discuss the findings of this report with Sutherland Shire Council representatives.

This report should be considered in conjunction with the Quantum report titled, "*Sutherland LGA supermarket analysis and Taren Point deep-dive*", which was prepared in April 2016 and has also been informed by consumer research prepared by Crosby Textor in March 2016.

The Quantum report presents an analysis of supermarket shopping behaviours of Sutherland Shire residents based on actual electronic transactional data.

The Crosby Textor consumer research provides insights into the preferences and issues of Sutherland Shire residents (i.e. Council's constituents), with information elicited through telephone surveys.

Report structure

This report is presented as follows:

Section 1: provides an overview of the current provision of supermarket floorspace across the Sutherland Shire, disaggregated by sub-region. This section also provides an analysis of the current and future population distribution across the Shire and examines their retail expenditure profile, and the implied future growth in demand for supermarket floorspace.

Section 2: reviews the Quantum transactional analysis and Crosby Textor market research that was commissioned as part of the suite of analytics prepared to examine the shopping patterns of Sutherland Shire residents.

Section 3: presents an analysis of relevant employment trends across the Shire, in particular, employment trends in the retail industry.

Section 4: examines the Taren Point locality and its suitability for additional supermarket facilities.

Section 5: identifies the implications of inadequate and poorly distributed supermarket floorspace supply; and then estimates the potential time savings that could result from improved supermarket floorspace distribution across the Shire.

1. Supermarket trends

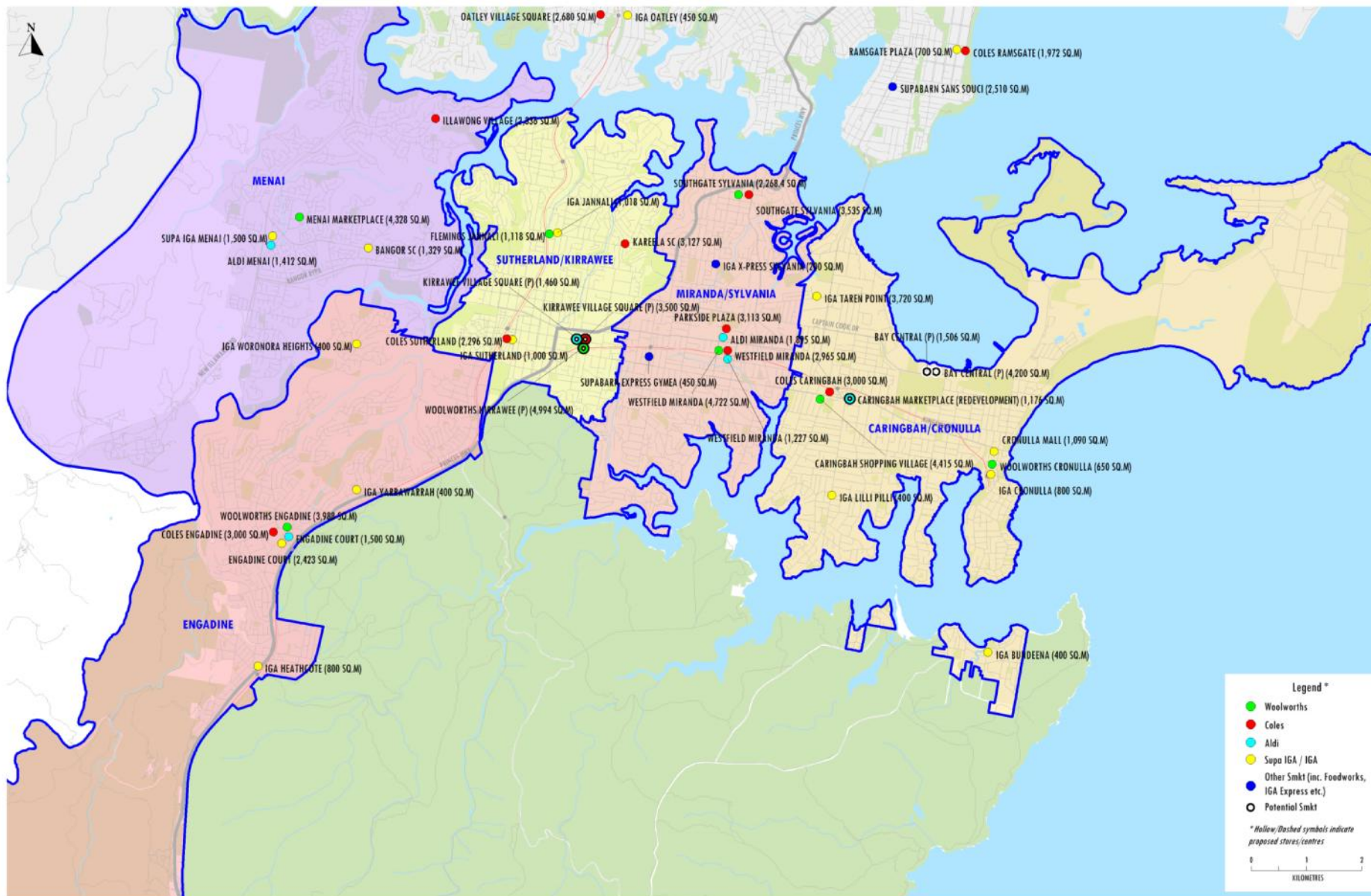
Section 1: Supermarket trends

1.1 Methodology

In order to examine the appropriateness of the supermarket floorspace provision across the Sutherland Shire the following methodology has been applied in this section of the report:

- Disaggregated the Sutherland Shire LGA into five sub-regions, in order to examine population growth and supermarket provision at a granular level (refer Map 1).
- Analysed the provision of supermarket floorspace per 1,000 residents in the Sutherland Shire and its sub-regions, in 2010 and 2015.
- Compared the supermarket provision rate within Sutherland Shire with other outer suburban LGAs across Sydney, as well as national and capital city benchmarks.
- Examined the future population growth across the Shire, and the distribution of this growth, to determine the future implied supermarket floorspace demand over the period to 2031.
- Had regard to the proposed/approved supermarket developments across the Sutherland Shire.
- Examined the annual retail and grocery expenditure per capita of Sutherland Shire residents, and compared this with metropolitan Sydney and Australian averages.





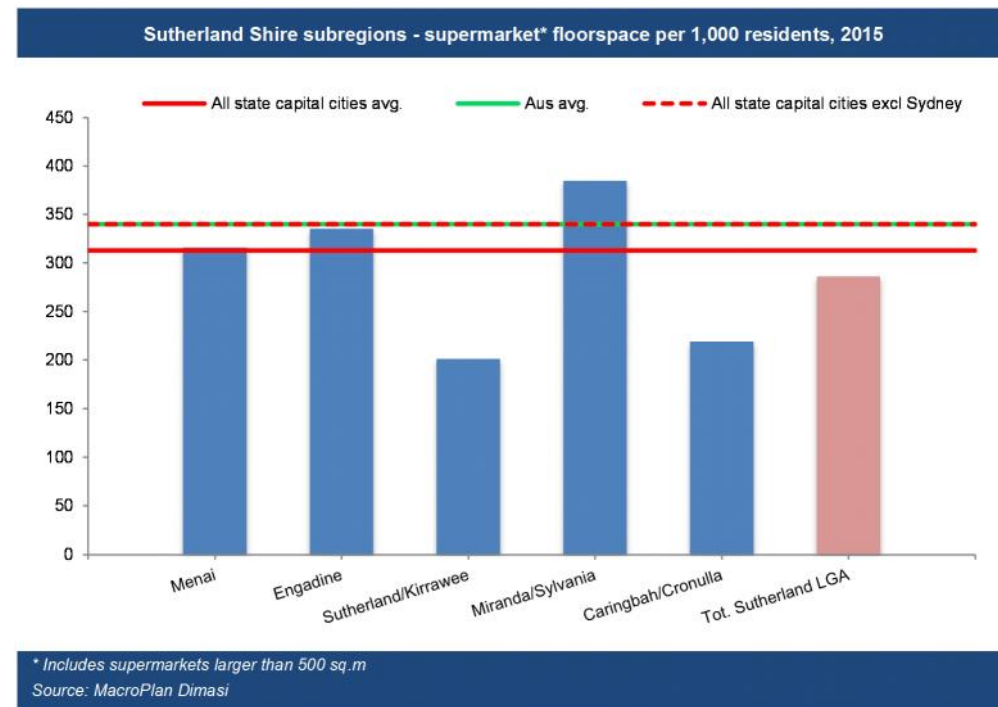
Map 1 – Sutherland Shire: supermarkets & sub-regions

Section 1: Supermarket trends

1.2 Supermarket provision

The adjacent chart shows that the Sutherland Shire is significantly under-provided for in regards to supermarket floorspace per capita, in aggregate, and the existing supply is also poorly distributed. The following key points are noted:

- There is typically around 340 sq.m of supermarket floorspace per 1,000 residents across Australia. The Australian average, ex-Sydney is around 363 sq.m per 1,000 residents.
- There is around 313 sq.m of supermarket floorspace per 1,000 residents across Australia's capital cities, and around 340 sq.m, on average, if Sydney is excluded.
- Sydney is chronically and significantly under-supplied in regards to supermarket floorspace per capita, at around 25-30% below other Australian capital cities.
- There is around 286 sq.m of supermarket floorspace per 1,000 residents across the Sutherland Shire as at year end 2015, which is around 16% below the capital cities average (ex-Sydney).
- Around 33% of all supermarket floorspace is located within the Miranda and Caringbah activity centres – which are located just 2km from each other in the eastern part of the shire. Clearly, there is an imbalance in the provision of supermarket space within the Shire.
- In addition to the current under-supply, there is a 'net inflow' of retail expenditure demand from beyond the Sutherland Shire. Westfield Miranda is a super-regional shopping centre that serves a trade area population in the order of 500,000 persons, extending south towards Wollongong/Shellharbour and north of the Georges River to include the areas around southern Bankstown, Hurstville, Rockdale, Kogarah etc. This 'net inflow' is not only relevant for higher order fashion/leisure shopping, but would also be relevant to supermarket shopping.



Section 1: Supermarket trends

1.2 Supermarket provision

The adjacent table shows Sutherland has been chronically under-supplied in terms of supermarket floorspace since 2010. We make the following comments in relation to this table:

- Across Australia, the rate of supermarket floorspace provision per capita increased by around 7.6% over the past five years, and across the five mainland capital cities, this rate has increased by about 5.1%.
- The rate of supermarket floorspace provision per capita in the Sutherland Shire has grown by just 2.3% over the past 5 years, meaning that new supply has not kept pace with population growth at 3.6%.
- The addition of new supermarket facilities at Westfield Miranda in 2015 was the only thing that prevented a decline in the rate of supermarket provision per capita between 2010 and 2015.
- The current under-provision of supermarket floorspace across Sutherland Shire equates to around 12,000 – 13,000 sq.m adopting a target rate of provision of 340 sq.m per 1,000 residents (i.e. the average across Australian capital cities (ex-Sydney)).

Sutherland Shire - supermarket provision relative to population, 2010-2015*								
Region	2010			2015			Growth (2010 - 15)	
	SMKT GLA	Population	GLA per 1000	SMKT GLA	Population	GLA per 1000	Population	GLA per 1000
Sutherland Shire								
• Menai	10,692	34,434	311	10,905	34,530	316	0.3%	1.7%
• Engadine	11,711	34,310	341	11,711	34,930	335	1.8%	-1.8%
• Sutherland/Kirrawee	8,399	40,706	206	8,559	42,500	201	4.4%	-2.4%
• Miranda/Sylvania	16,334	49,576	329	19,725	51,250	385	3.4%	17%
• Caringbah/Cronulla	<u>13,814</u>	<u>58,810</u>	<u>235</u>	<u>13,675</u>	<u>62,400</u>	<u>219</u>	<u>6.1%</u>	<u>-6.7%</u>
Total Sutherland Shire	60,950	217,836	280	64,575	225,610	286	3.6%	2.3%
Capital cities	-	-	298	-	-	313		5.1%
Capital cities excl Sydney	-	-	323	-	-	340		5.3%
Australia	-	-	316	-	-	340		7.6%
*Supermarkets greater than 500 sq.m								
Source: ABS; MacroPlan Dimasi								

Section 1: Supermarket trends

1.3 Comparison with other LGAs

The adjacent table and chart on the next page compare the rate of supermarket provision per 1,000 residents with other outer suburban LGAs across metropolitan Sydney, as well as the Australian average and Australian capital cities average.

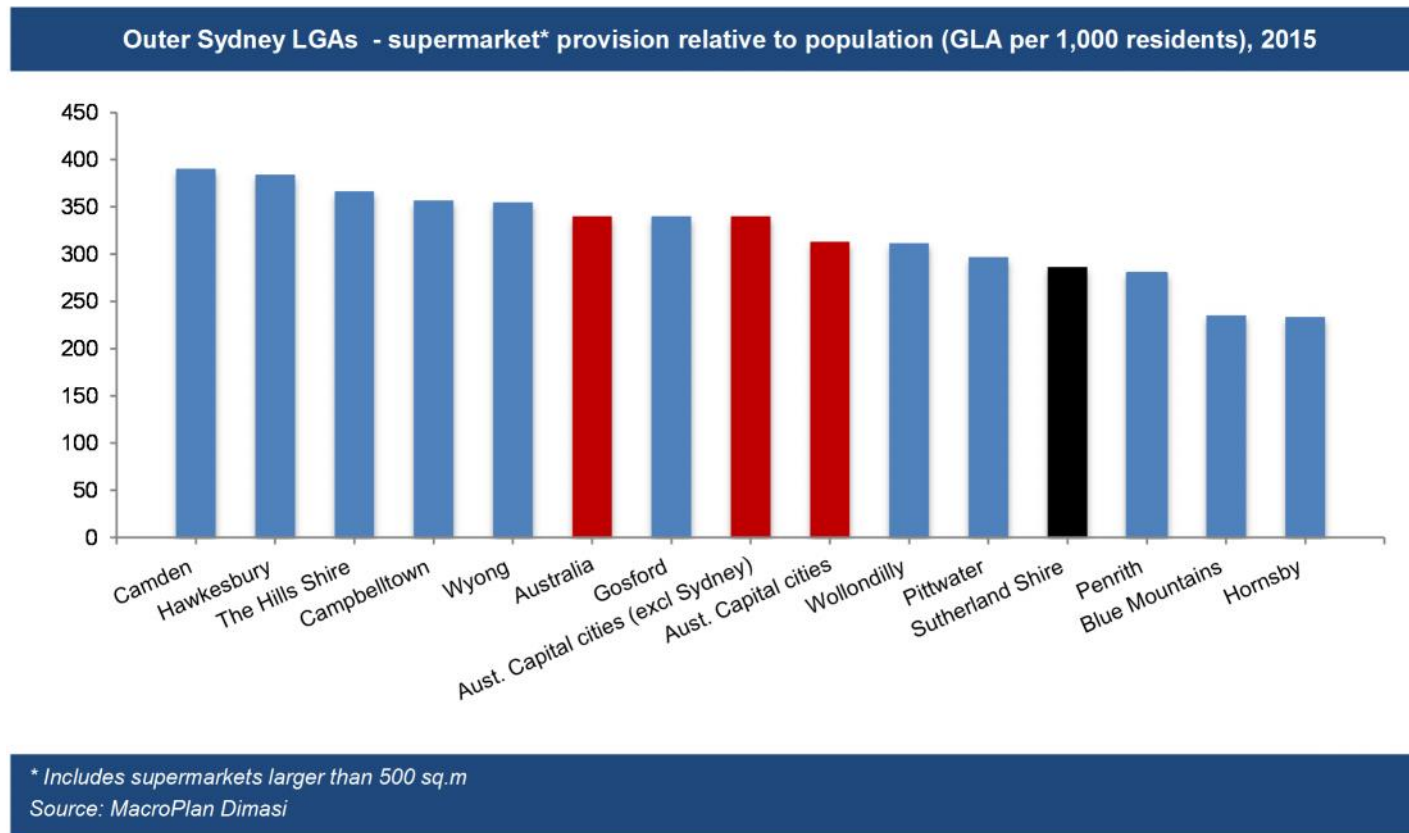
- The rate of provision per 1,000 residents in Sutherland (286 sq.m) is significantly below most outer suburban LGAs.
- Only the Penrith, Blue Mountains and Hornsby LGAs have lower rates of provision per 1,000 sq.m.
- Furthermore, and as alluded to earlier, some LGAs do not contain any regional or sub-regional scale shopping facilities, while some, such as Sutherland Shire, contain significant super-regional shopping centres that service regional scale catchments, extending well past the LGA boundaries.
- In this context, one would expect the rate of supermarket provision in Sutherland Shire to be much greater than other LGAs, yet it is ranked fourth last in the list.

Outer Sydney LGAs - supermarket provision relative to population					
LGA/Region	Smkt GLA (sq.m)	2015*	Smkt GLA per 1,000	No. of centres	
		Population		Regional	Sub- regional
Camden	30,929	72,260	390	0	2
Hawkesbury	25,731	66,290	384	0	1
The Hills Shire	72,103	192,810	366	1	3
Campbelltown	58,713	158,990	357	1	3
Wyang	57,614	159,980	355	1	2
Gosford	58,677	173,140	340	1	1
Wollondilly	14,623	48,040	312	0	0
Pittwater	18,769	64,190	297	0	1
Sutherland Shire	65,514	225,610	286	1	2
Penrith	56,030	197,910	280	1	2
Blue Mountains	19,149	79,550	235	0	1
Hornsby	39,681	170,820	234	1	1
Aust. Capital cities	-	-	313	-	-
Aust. Capital cities (excl Sydney)	-	-	340	-	-
Australia	-	-	340	-	-

**Includes supermarkets 500 sq.m and larger
Source: ABS; MacroPlan Dimasi*

Section 1: Supermarket trends

1.3 Comparison with other LGAs

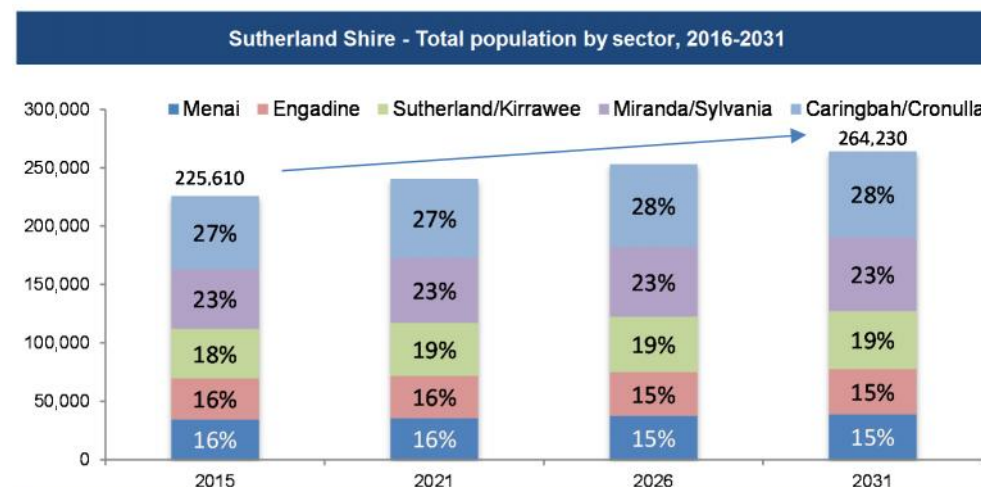


Section 1: Supermarket trends

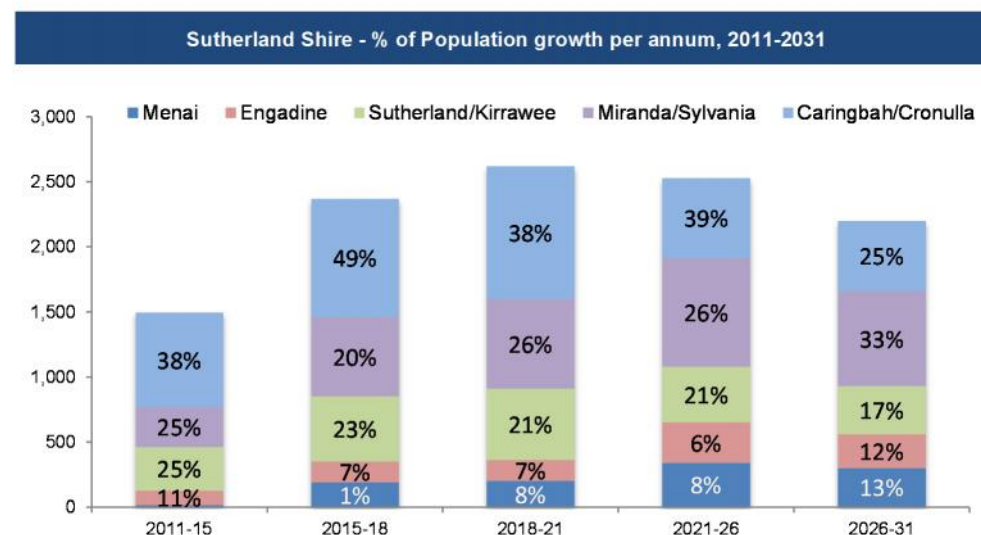
1.4 Future population and supermarket floorspace growth

The adjacent tables show the future population growth expected across the Sutherland Shire, by sub-region, as per the NSW Bureau of Transport Statistics (BTS) projections.

- As mentioned earlier, the existing under-provision of supermarket floorspace across the Sutherland Shire is equivalent to around 12,000 – 13,000 sq.m.
- The Shire's population is projected to grow by around 17% to 2031, from 225,610 in 2015 to 264,230 by 2031. This growth of 38,620 persons by 2031 would be equivalent to around 13,000 sq.m of additional supermarket floorspace demand.
- This means that a further 8 large supermarkets (above 3,000 sq.m) would be needed between now and 2031 in order for the Sutherland Shire to match the current average provision across Australian capital cities (ex-Sydney).
- The bottom chart shows that around 60 – 65% of the future population growth is expected to occur in the eastern part of the Shire (i.e. the Miranda/Sylvania and Caringbah/Cronulla sub-regions). Yet these areas are planned to accommodate just one new large supermarket at Woollooware (plus an Aldi supermarket) and an Aldi supermarket at Caringbah in the foreseeable future.
- Elsewhere across the Shire, there is only one other large supermarket approved, the Coles supermarket under construction at South Village (i.e. the former Kirrawee Brick Pit site), which will also include an Aldi supermarket. There is also a proposed Woolworths supermarket at Kirrawee which may be approved in the future.



Source: ABS, NSW BTS



Source: ABS, NSW BTS

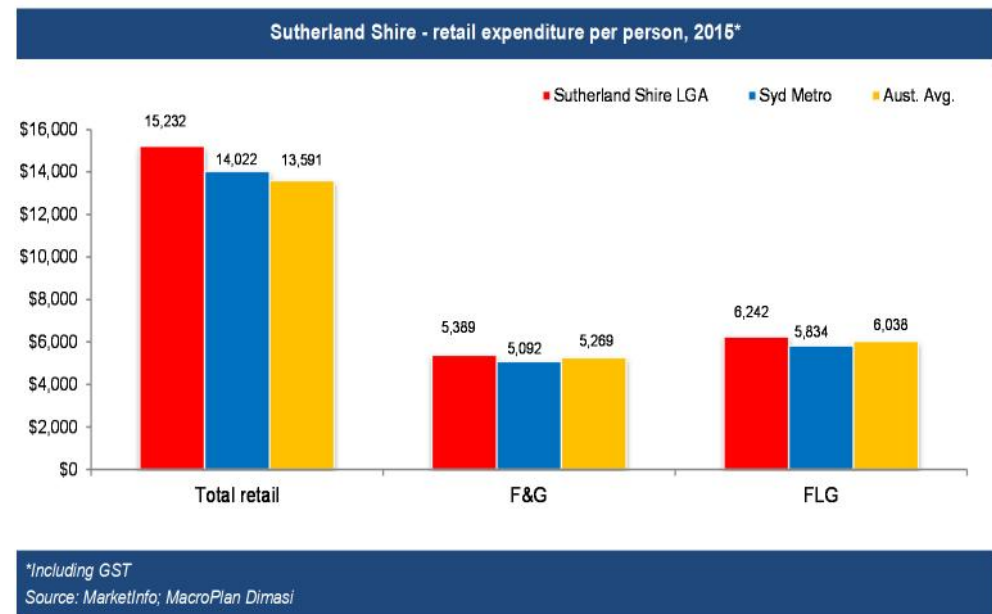
Section 1: Supermarket trends

1.5 Retail expenditure per capita

The adjacent table illustrates the estimated annual retail expenditure per capita of the Sutherland Shire population, compared with benchmarks for metropolitan Sydney and Australia, based on MarketInfo data. These data are presented in \$2015 dollars and inclusive of GST.

We make the following comments:

- Sutherland Shire residents spend around 8 – 9% more per capita on retail goods and services than the average resident across metropolitan Sydney, and around 12% more per capita than the average resident across Australia.
- In regards to spend on take-home food and grocery (F&G) items, and take-home food, packaged liquor and grocery (FLG), Sutherland Shire residents spend around 5.8% and 7.2% more per capita more than the average Sydney resident, and around 2 – 3% more than the average Australian resident.
- Therefore, in addition to the Shire being significantly under-supplied in terms of supermarket floorspace per capita, Shire residents also spend a lot more on supermarket retailing per capita, which further exacerbates the adverse effects of an under-supply (e.g. congestion, inferior customer amenity).
- The relatively high affluence and high proportion of family households – where parents tend to buy groceries and prepare meals at home, drive this above average expenditure profile.



2. Consumer market research

Section 2: Consumer market research

2.1 Quantum analysis

Purpose

Quantum was engaged to examine the actual supermarket shopping patterns of Sutherland Shire residents. The analysis by Quantum represents a very accurate picture of the actual supermarket expenditure behaviours of residents in Sutherland Shire.

Quantum is able to assess where residents conduct their supermarket shopping within the Sutherland Shire, and their suburb of origin, as well as how much expenditure escapes beyond the Sutherland Shire.

The analysis of supermarket expenditure provides an additional overlay to the supermarket trends analysis of Section 1.

The Quantum analysis is attached as Appendix 1 to this report, and assessed the following:

- Reviewed the supermarket expenditure patterns for each sub-region.
- Reviewed the supermarket expenditure patterns for each suburb.
- Assessed the average distances travelled by residents to undertake supermarket shopping trips.
- Reviewed the supermarket expenditure patterns and travel distances of residents in the Taren Point locality specifically.

About Quantum Data

The basis of the Quantum Market Blueprint data is the full set of electronic transactions (credit card and debit card) for all National Australia Bank (NAB) customers across Australia. The information enables Quantum to plot both the origin (i.e. the home address) and the destination (i.e. the particular store) for each transaction.

The NAB coverage means that Quantum is able to analyse and plot the actual transactional behaviours of more than 2.5 million customers nationally, which forms the basis for a detailed estimation of expenditure flows for any identified area.

In short, the Quantum data provides a detailed analysis of actual spending behaviours by residents of the Sutherland Shire.

The data provided, for the year to April 2016, reflects actual transactions conducted by all of these residents, over the 12 month period, at all supermarkets within the trade area.

The data show the reality of what is currently happening in terms of supermarket expenditure across the Shire, at a very granular level.

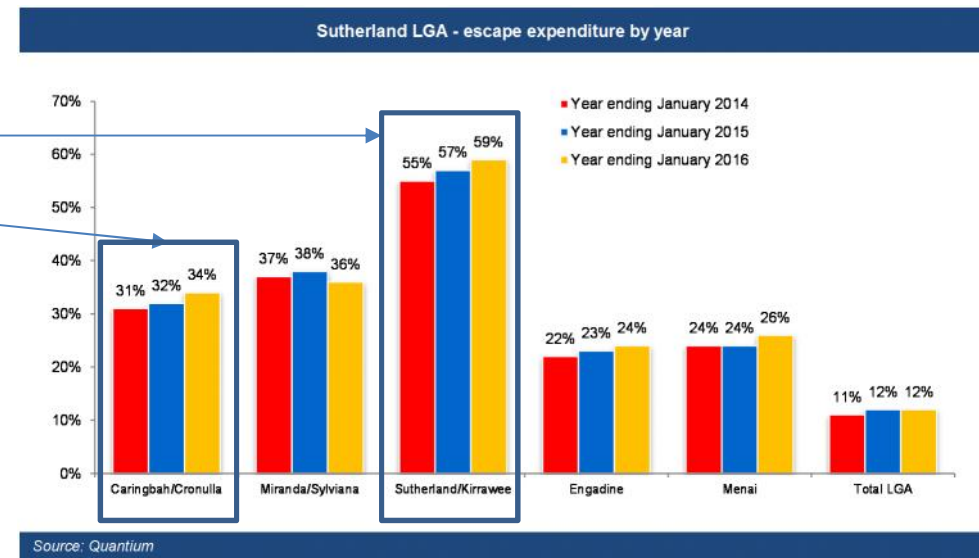
Section 2: Consumer market research

2.1 Quantum analysis

Supermarket expenditure patterns - by sub-region

The following supermarket expenditure behaviours were identified by Quantum in its analysis:

- Around 59% of Sutherland/Kirrawee residents' supermarket expenditure escapes the sub-region.
- Around 34% of Caringbah/Cronulla residents' supermarket expenditure escapes the sub-region.
- Around 12% of all supermarket expenditure generated by Sutherland Shire residents escapes the Shire.
- Aside from the Miranda/Sylvania sub-region, where the provision of supermarket floorspace per capita is above average due to the provision of a super-regional shopping centre (Westfield Miranda) and a sub-regional shopping centre (Southgate Sylvania) with multiple supermarkets, the sub-regions with an under-supply of supermarket floorspace tend to exhibit the greatest proportion of escape expenditure to other sub-regions.
- For the Miranda/Sylvania sub-region, the proportion of escape expenditure is relatively high due to the large cross-over flows between Caringbah and Miranda centres which are located relatively close together.



Section 2: Consumer market research

2.1 Quantum analysis

Supermarket travel patterns

The adjacent chart shows that existing provision of supermarkets is less than optimal as residents generally travel much further than their most proximate supermarket, presumably to access larger, more comprehensive supermarket offers.

The chart shows the average distance travelled (from home) to undertake supermarket shopping trips for residents in Kirrawee/Sutherland (+2.3km), Caringbah/Cronulla (+2.4km) and Engadine (+2.4km) is more than 200% greater than the distance to their nearest supermarket.

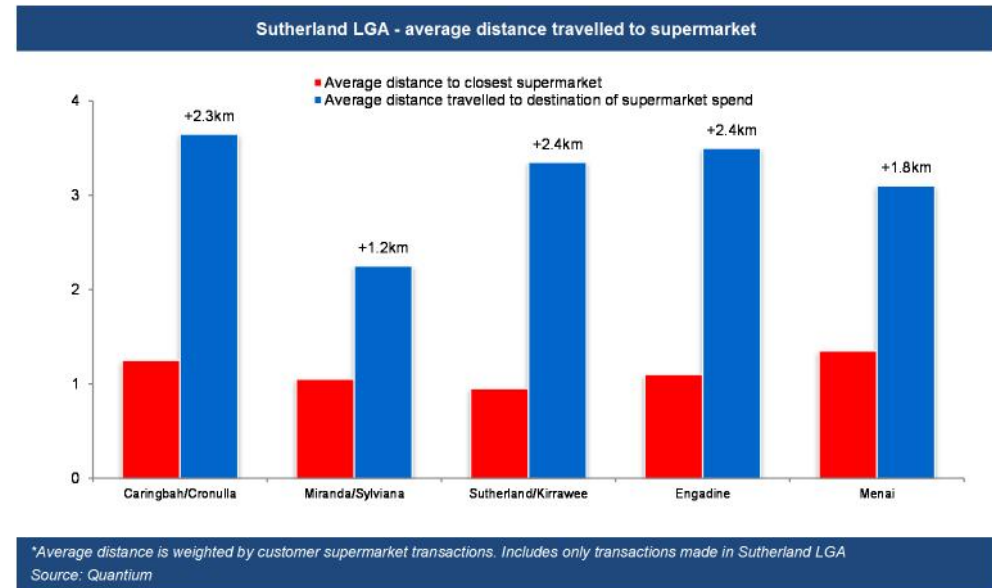
In Miranda/Sylvania and Menai this percentage is around 120 - 150%.

Supermarket expenditure very focussed on two centres

Not only is the Sutherland Shire under-provided for in terms of supermarket floorspace per capita in aggregate, but there is a major issue in relation to the distribution of supermarket floorspace across the Shire.

Around 33% of all supermarket floorspace is contained within the Miranda and Caringbah activity centres, which are located just 2km apart in the eastern part of the Shire.

These centres also attract expenditure from residents beyond the Sutherland Shire, however, the Quantum analysis shows that these centres also attract around 33 - 35% of all supermarket expenditure generated by Sutherland Shire residents.



Section 2: Consumer market research

2.1 Quantum analysis

Supermarket expenditure patterns - Taren Point residents

- Quantium undertook a detailed analysis of supermarket expenditure patterns at a suburb level as well as a specific assessment of the catchment within a 1km radius of the IGA supermarket at Taren Point.
- The table adjacent shows that around 75% of all supermarket expenditure generated by residents in the defined Taren Point catchment is not spent at the Taren Point IGA supermarket – with considerable escape expenditure to Miranda (22%), Caringbah (22%) and Sylvania (12%).
- The average distance to the IGA supermarket for this catchment is about 0.9 km, however the average distance travelled to undertake supermarket shopping trips for this population was about 2.0km.
- The existing provision of supermarket facilities in the Taren Point catchment appears to not be meeting the needs of the local population.

Supermarket expenditure patterns - Taren Point catchment residents		
Area of Origin	Supermarket destination	% spend
Caringbah / Cronulla	Caringbah	22%
	Taren Point	25%
	Cronulla	1%
	Caringbah South	4%
	Lilli Pilli	0%
	Bundeena	0%
	Woollooware	0%
Miranda / Sylvania	Miranda	22%
	Sylvania	12%
	Gymea	0%
Sutherland / Kirrawee	Kareela	0%
	Jannali	0%
	Sutherland	0%
Engadine	Engadine	1%
	Heathcote	0%
	Yarrawarrah	0%
Menai	Worona Heights	0%
	Menai	1%
	Illawong	0%
	Bangor	0%
Out of Sutherland LGA		12%
Total		100%
Source: Quantum		

Section 2: Consumer market research

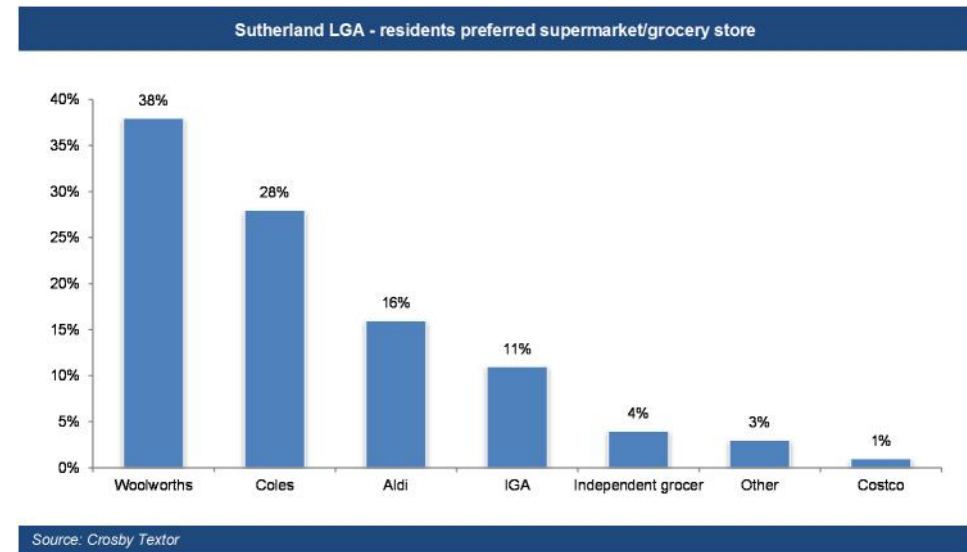
2.2 Crosby Textor research

Purpose of Crosby Textor research

Crosby Textor is a market research company that conducted primary market research through telephone surveys in relation to supermarket behaviours and preferences of Sutherland Shire residents. The research addresses issues that were more qualitative in nature than the transactional supermarket expenditure analytics prepared by Quantum.

The key findings of note included the following:

- 38% of residents across the Sutherland Shire cited Woolworths as their preferred supermarket brand, with Coles second at 28%.
- Easing local traffic congestion is the most important 'local issue' identified across the whole Sutherland Shire, with 90% citing this as important or very important.
- A need for more local job opportunities and tackling youth unemployment were also identified as very important local issues, with 80 - 85% citing this as important or very important.
- 70% of respondents favourably responded to the suggestion that there should be more retail jobs in the Shire.
- Most respondents indicated that they prefer to shop at the most convenient location available (87%). However, the Quantum data indicate that people travel further than their closest supermarket, on average, to conduct their supermarket shopping trips, which means their preferences are not being met.
- Indeed, 77% of respondents prefer shopping at larger supermarkets with a full range of products. Ideally, therefore, such supermarkets would be located close to where people live – not just in centres.



3. Employment trends

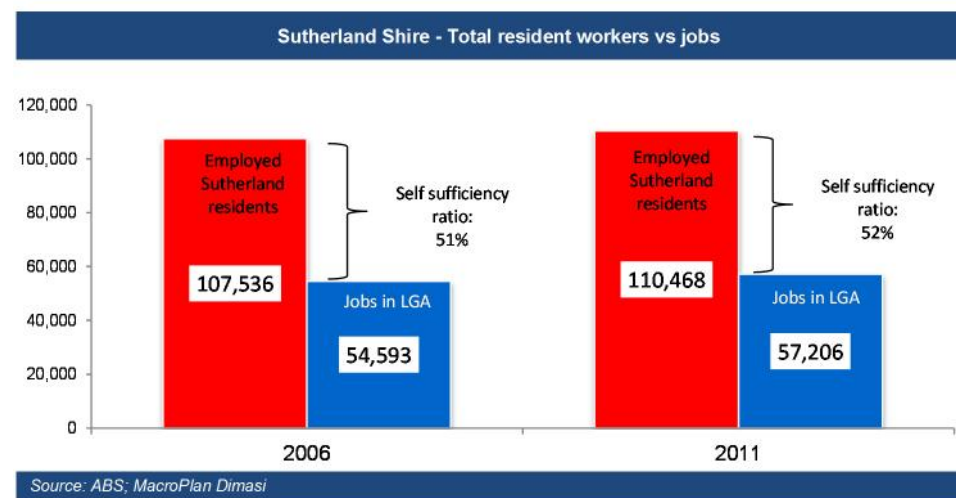
Section 3: Employment trends

3.1 Shortfall in retail jobs & jobs in general

The charts adjacent present an analysis of the job provision in the Sutherland Shire compared against the local resident workforce, based on data from the 2011 ABS Census of Population and Housing. The first chart presents an analysis of the retail industry specifically and the second chart presents an analysis of total employment. The following key points are noted:

- As at the 2011 Census, there were around 110,500 resident workers in the Sutherland Shire yet only 57,200 local jobs were available in the Shire.
- Furthermore, approximately 20% of the 57,200 local jobs were filled by workers from beyond the Sutherland Shire, meaning around 60% of Sutherland Shire resident workers leave the LGA every day for work.
- The number of Sutherland Shire residents employed in the retail industry decreased between 2006 and 2011, by around 400 workers yet the total number of resident workers increased by almost 3,000.
- The number of jobs in the Sutherland Shire grew by around 4.8% between 2006 and 2011, yet retail jobs in the Shire declined by 1%.
- There was a net under-provision of retail jobs in the Sutherland Shire of around 16%, or 1,753 jobs in 2011.
- Retail trade is a key driver of the local economy, constituting around 16% of all local jobs as at 2011, the largest employing industry in the Shire, followed by health care & social assistance (14%).

In summary, the lack of sufficient investment in retail development between 2006 and 2011 in the Sutherland Shire resulted in a deterioration in local retail jobs and a continued net exodus of retail employment to other LGAs. The recent expansion of Westfield Miranda (in 2015) will contribute to addressing this shortfall to some extent, however, there would still remain a major net outflow of employment from the Shire in general, given more than 66,000 resident workers left the Shire each day in 2011.



4. Taren Point – site potential

Section 4: Taren Point – site potential

4.1 Taren Point locality

This report has been prepared to examine the supermarket trends and customer shopper behaviours across the whole Sutherland Shire. However, at a more specific level around Taren Point, there are several other issues that should be noted:

Taren Point Road traffic – significant latent demand

- Taren Point Road is the second busiest road in the Sutherland Shire, accommodating around 58,000 vehicle trips per day (VPD) in 2015 (just south of the bridge), according to the RMS. This is only marginally less than the 60,000 VPD recorded on the Princes Highway just north of Bates Drive at Kareela.
- The traffic generated on this road would include local residents leaving the Shire for work; parents taking children to schools near Taren Point as well as beyond the Shire; and workers accessing the Taren Point/Caringbah precinct. Most of these users would be making such trips frequently – i.e. twice on daily basis on weekdays.

Taren Point/Caringbah - employment precinct

- The Taren Point/Caringbah employment precinct is a key employment node in the Sutherland Shire, accommodating in excess of 11,000 jobs (around 20% of the Shire total), of which around 7,000 jobs are located in the precinct north of Box Road and the area around Parraweena Road and Taren Point Road.
- This worker population, in and of itself, would drive substantial additional demand for supermarket/convenience facilities over and above the local residential catchment and passing traffic.
- In this regard, Taren Point would represent a very suitable location for additional full-line supermarket facilities because a significant amount of latent demand exists already from drivers already passing through the locality. This would mean that many shoppers would be able to link another trip with a supermarket trip which would help to reduce specific/dedicated trips to supermarkets throughout the Shire.

Taren Point catchment – significant leakage

- The Quantum analysis showed that the residential area around Taren Point has a high supermarket expenditure leakage rate to other centres, in particular to Caringbah (22%), Miranda (22%) and Sylvania (12%).
- P.36-37 of the Quantum report shows that 75% of supermarket expenditure generated by this population is directed to supermarkets beyond Taren Point and that on average (or frequently), residents of the Taren Point catchment travel around 2km per supermarket trip – even though on average they are located around 1km from their closest supermarket (i.e. IGA Taren Point).
- Section 5 provides an analysis of the potential time savings that could be achieved in aggregate across the whole Sutherland Shire were just 10% of the population able to save 1 min (or around 0.5 – 1km) from 1 in 10 supermarket shopping trips per annum.

Centres at capacity & inadequate distribution of supermarket floorspace

- As shown earlier, not only is the Sutherland Shire under-provided for in terms of supermarket floorspace per capita in aggregate, but there is a major issue in relation to the distribution of supermarket floorspace across the Shire. Of particular note, around 33% of all supermarket expenditure generated by Sutherland Shire residents is captured by supermarkets in Caringbah and Miranda, which are located just 2km apart in the centre of the Shire.
- A policy that encourages future residential development in centres and quarantines supermarket development to centres only, fails to acknowledge that particular centres in the Shire are already at capacity and neglects major non-centre employment precincts. (cont. next page)

Section 4: Taren Point – site potential

- Caringbah and Miranda are under significant pressure due to a lack of full-line supermarket facilities around Sutherland/Kirrawee and Caringbah/Cronulla.
- The provision of new facilities at Kirrawee and Woollooware will help to ameliorate this issue to some extent, however, further provision of supermarket facilities in 'non-centre' locations (i.e. near main roads where there is already latent demand), is considered to be critical in relieving acute capacity issues that currently exist in some centres and to help prevent the escalation of such issues.

4.2 Future supermarket supply

There are several proposals for new supermarket developments across the Sutherland Shire including:

- **Sharks Club at Woollooware (Approved & under construction)** – a mixed use redevelopment of the Sharks Club is currently under construction including residential, medical, rejuvenated club facilities and a full-line supermarket, plus an Aldi supermarket plus mini-majors and specialty retail. This development is due for completion around 2019 or so.
- **South Village at Kirrawee (Approved & under construction)** - which will include a full-line Coles supermarket and an Aldi supermarket, and supporting specialty retail. This development is due to open around 2018 or so.
- **Woolworths supermarket at Kirrawee (Proposed)** – a revised development application was submitted in December 2015 for the development of a full-line Woolworths supermarket (and Dan Murphy's) on Flora Street in Kirrawee. This application is currently being assessed by Sutherland Shire Council.
- **Aldi at Caringbah** – is due to begin construction soon, and open in the next year or so.

The provision of a new full-line supermarket at the Sharks Club at Woollooware (plus a Aldi supermarket) will help to provide local full-line supermarket facilities, servicing residents in the suburbs of Woollooware, Cronulla, Kurnell etc.

However, the site is disconnected from the rest of the Taren Point/Caringbah employment precinct and will do little to provide convenience amenity for these workers or minimise daily trips generated by this worker population; and will not really service the latent demand generated by the traffic using Taren Point Road.

The provision of new supermarket facilities at Kirrawee will help to meet the significant demonstrated shortfall of supermarket facilities in the Sutherland/Kirrawee sub-region – where more than 50% of resident expenditure escapes the sub-region and will provide an opportunity for some of the latent demand from passing traffic on the Princes Highway to be captured.

However, this will do little in the way of addressing the shortfall in the north-eastern part of the Sutherland Shire, nor servicing the significant local workforce around Taren Point/Caringbah, and will not serve the significant latent demand generated by passing traffic on Taren Point Road.

The new facilities at Kirrawee are long overdue and will merely help to address part of the supermarket distribution problem across the Shire.

5. Net community impacts

Section 5: Net community impacts

5.1 Adverse impacts of under-supply...

The following adverse consequences have been identified, resultant from an undersupply, or inadequately distributed supply, of supermarket floorspace across the Sutherland Shire:

- **Congestion issues** – within supermarkets themselves (i.e. over-crowding/queues), their associated car-parks (queues), and surrounding streets (traffic) particularly at peak times.
- **Deterrent effects** – whereby customers/shoppers alter their shopping behaviours to shop at less convenient times in order avoid congestion/time wasting.
- **Increased travel times/costs** – due to inadequate provision of supermarket facilities (i.e. long travel distances) and due to congested existing supermarket facilities (lost time).
- **Reduced competition** – which can lead to higher prices for consumers at a local area level.
- **Increased supermarket/retailer profitability** – which can lead to a lack of reinvestment and a decline in customer services at a local level.
- **Less job opportunities** - limits the retail job opportunities for local residents, which is particularly an issue given the relatively high leakage of employed residents to areas outside the Shire.
- **Potential decline of non-centre employment precincts** – a lack of immediate amenities for workers in major “non-centre” employment precincts could lead to the general decline of these precincts – as local workers/businesses may seek better serviced localities. Providing local amenities would minimise car-trips by workers.

5.2 Potential time savings...

As alluded to earlier, one of the most important benefits of providing a convenient and appropriately distributed network of full-line supermarkets is that it saves travel time for customers, on a per trip basis, which translates to significant gains at an aggregate level across the whole community.

Some centres in the Sutherland Shire suffer from major congestion issues, particularly at peak times, for example Caringbah and Miranda.

Even small savings in time, can add up to significant aggregate time savings across a network (i.e. across the Sutherland Shire).

There are around 226,000 – 227,000 residents in the Sutherland Shire, residing in around 75,000 households. Assuming each household undertakes 1.5 supermarket based trips per week, on average, per year, this would be the equivalent to around 5.8 – 5.9 million supermarket based shopping trips per annum.

The Quantum analysis showed that the average supermarket trip distance undertaken by Sutherland residents is around 120 - 200% greater than the average distance to their closest supermarket (i.e. the average distance to the nearest supermarket facilities tends to be around 1km, whereas the average trip is around 2.2 – 3.4.km). This means that many residents are bypassing smaller, more proximate supermarkets because they do not provide a comprehensive range of grocery items.

If just 10% of households were able to save 1 minute per trip for 10% of their annual supermarket trips as a result of better/more convenient access to supermarket facilities, this would equate to total time savings of 58,000 – 59,000 minutes, or more than 40 days.

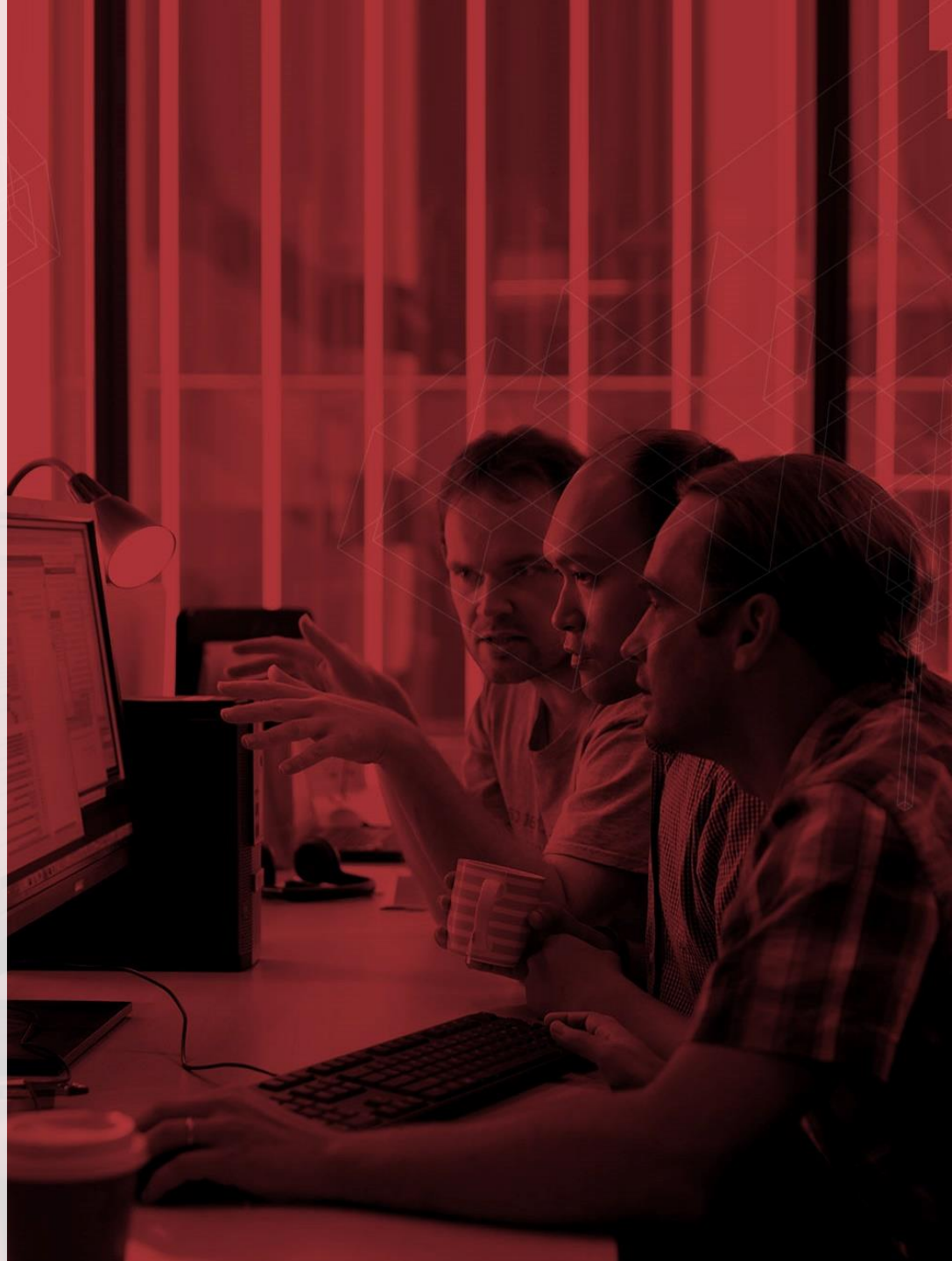
Appendix



Sutherland LGA supermarket analysis and Taren Point deep-dive

Wade Tubman and Donald
Freudenstein

April 2016



Agenda

1 Executive summary

2 Sutherland LGA by zone

3 Sutherland LGA by suburb

4 Taren Point deep-dive

5 Appendix

Agenda

1 Executive summary

2 Sutherland LGA by zone

3 Sutherland LGA by suburb

4 Taren Point deep-dive

5 Appendix

Background and executive summary

Background

- ⇒ Quantum was engaged to investigate the adequacy of supermarket provision in the Sutherland LGA, particularly relating to an inconvenience of residents and overtrading or undertrading of existing supermarkets in the area

Executive summary

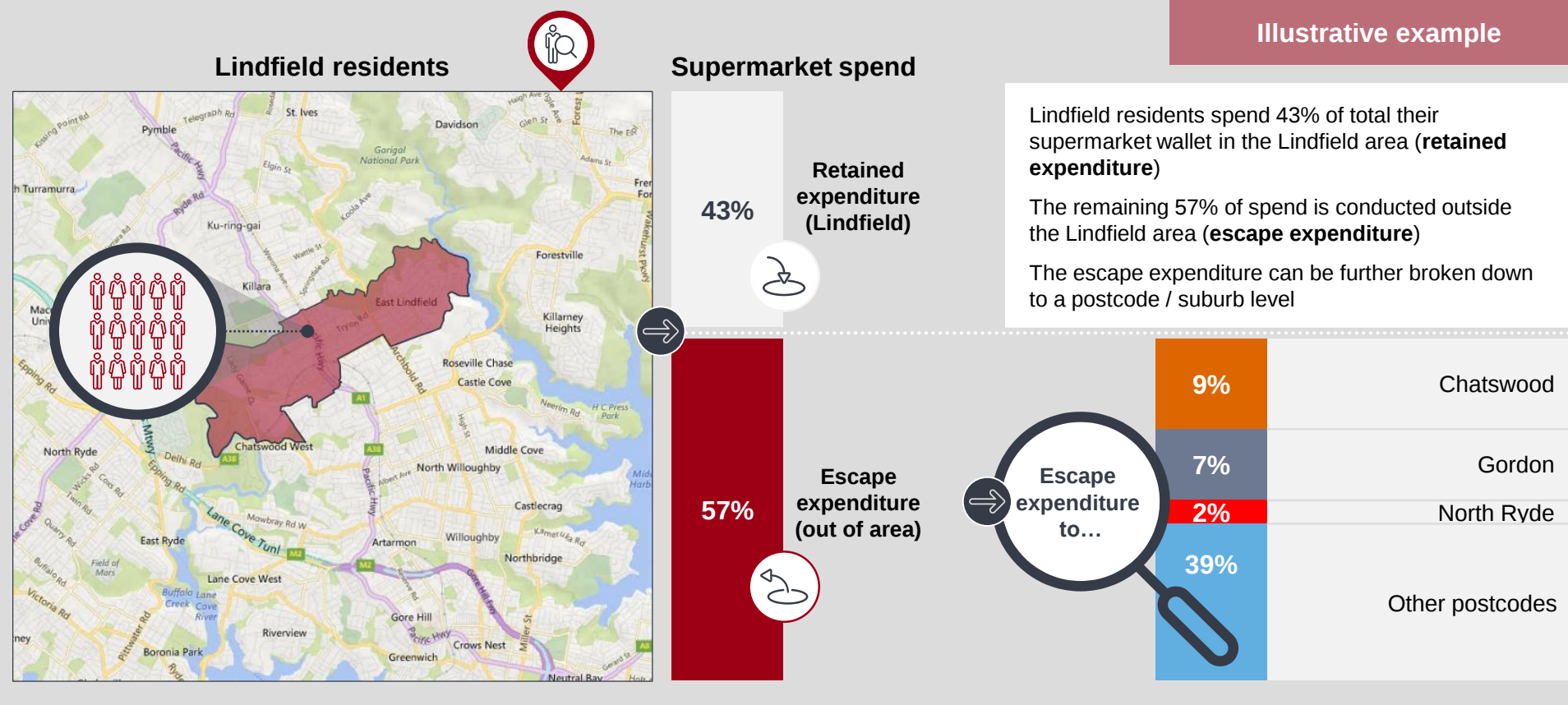
- ⇒ There is a clear under-provision of supermarkets in the Sutherland / Kirrawee area as evidenced by high levels of escape expenditure and distance travelled by residents to complete their supermarket missions
- ⇒ Supermarkets in all areas within Sutherland / Kirrawee undertrade except for Kareela which overtrades. In particular, Jannali supermarkets significantly undertrade relative to the rest of the Sutherland LGA. Kirrawee currently has no supermarkets to service the area
- ⇒ Despite having supermarkets in the area, Cronulla has a high level of escape expenditure to Caringbah. This is also reflected in clear overtrading of Caringbah supermarkets and under-trading of Cronulla supermarkets
- ⇒ Taren Point catchment residents have a very high level of escape expenditure to Caringbah, Miranda and Sylvania

Escape expenditure measures the proportion of supermarket spend that is conducted outside the residents area of convenience

An area with a high level of escape expenditure can be evidence of a poor supermarket offering or under-provision of supermarkets

Escape expenditure is also associated with increased travel times and inconvenience for residents to complete supermarket missions

Illustrative example



Notes on analysis



All analysis is for year ending January 2016 (unless otherwise stated)

01



All analysis is based on the Quantum majors supermarket tracker with the addition of Supabarn (see appendix)

02

Agenda

1 Executive summary

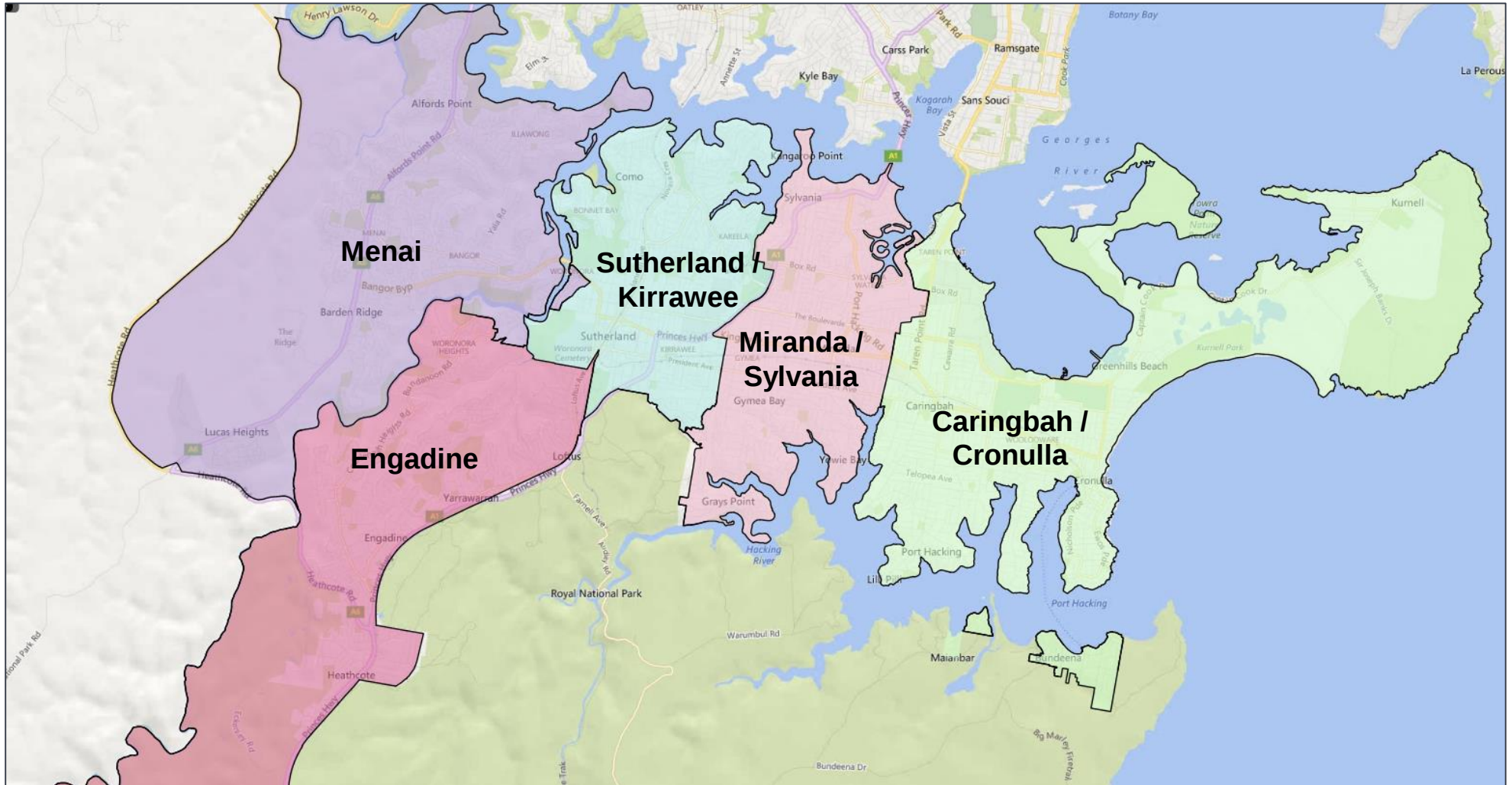
2 Sutherland LGA by zone

3 Sutherland LGA by suburb

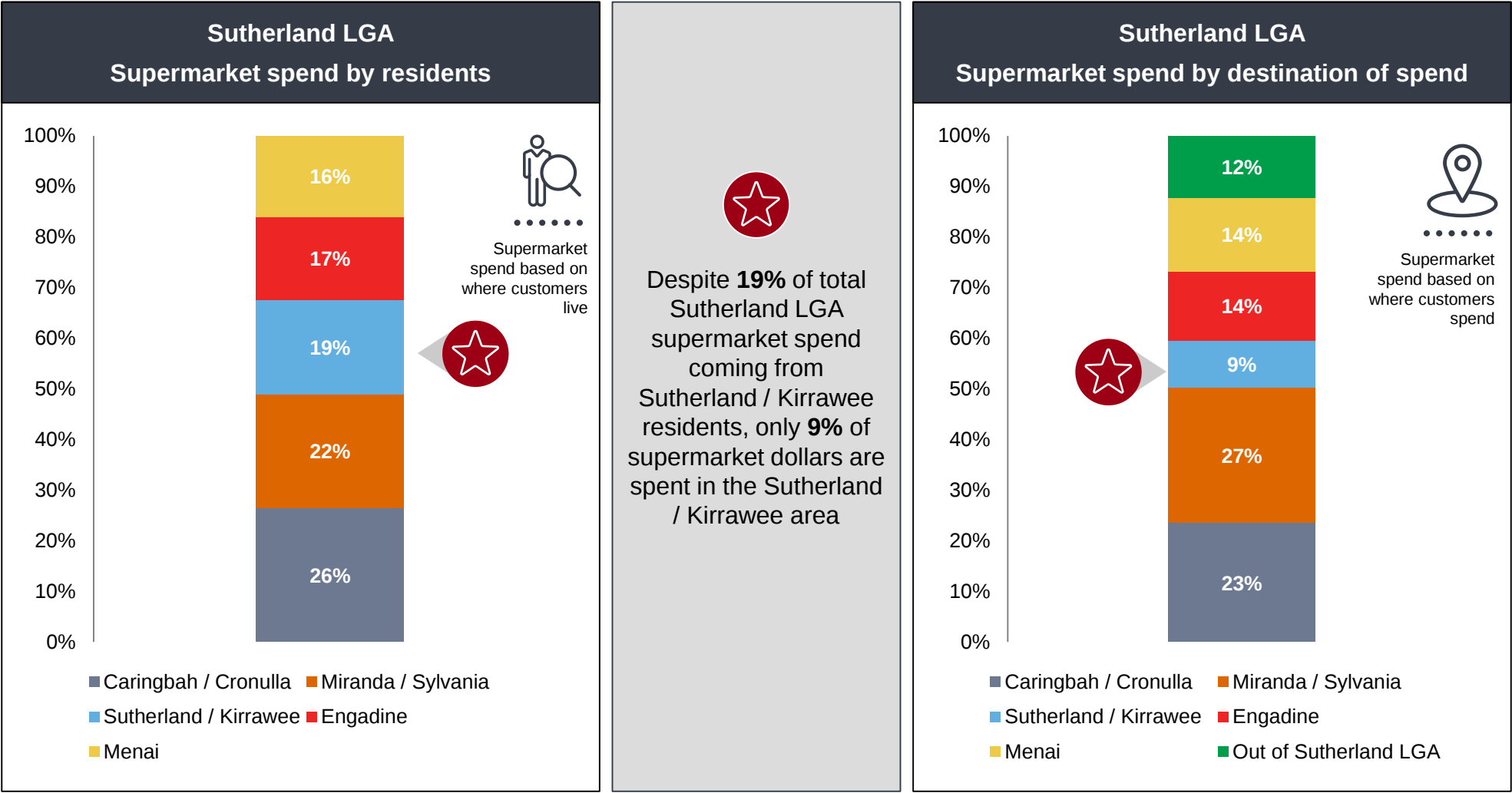
4 Taren Point deep-dive

5 Appendix

Sutherland LGA by zone

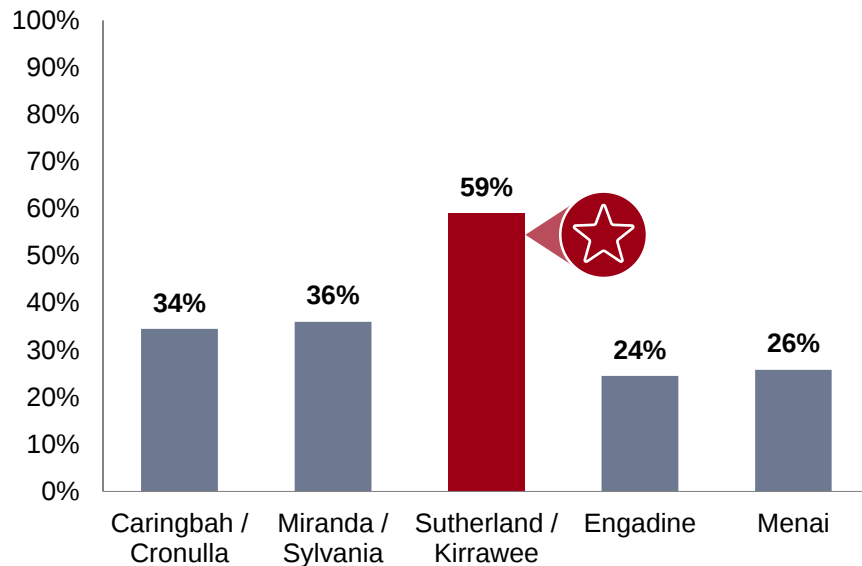


Sutherland / Kirrawee attracts a much lower proportion of supermarket dollars compared to residents contribute to overall LGA supermarket spend



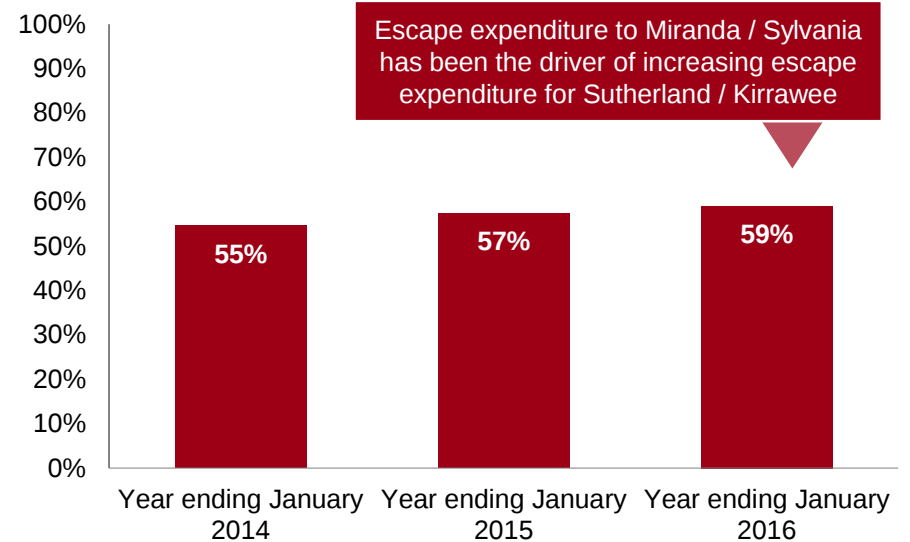
Escape expenditure in Sutherland / Kirrawee is very high and has been increasing since 2013

Escape expenditure by Sutherland LGA zone



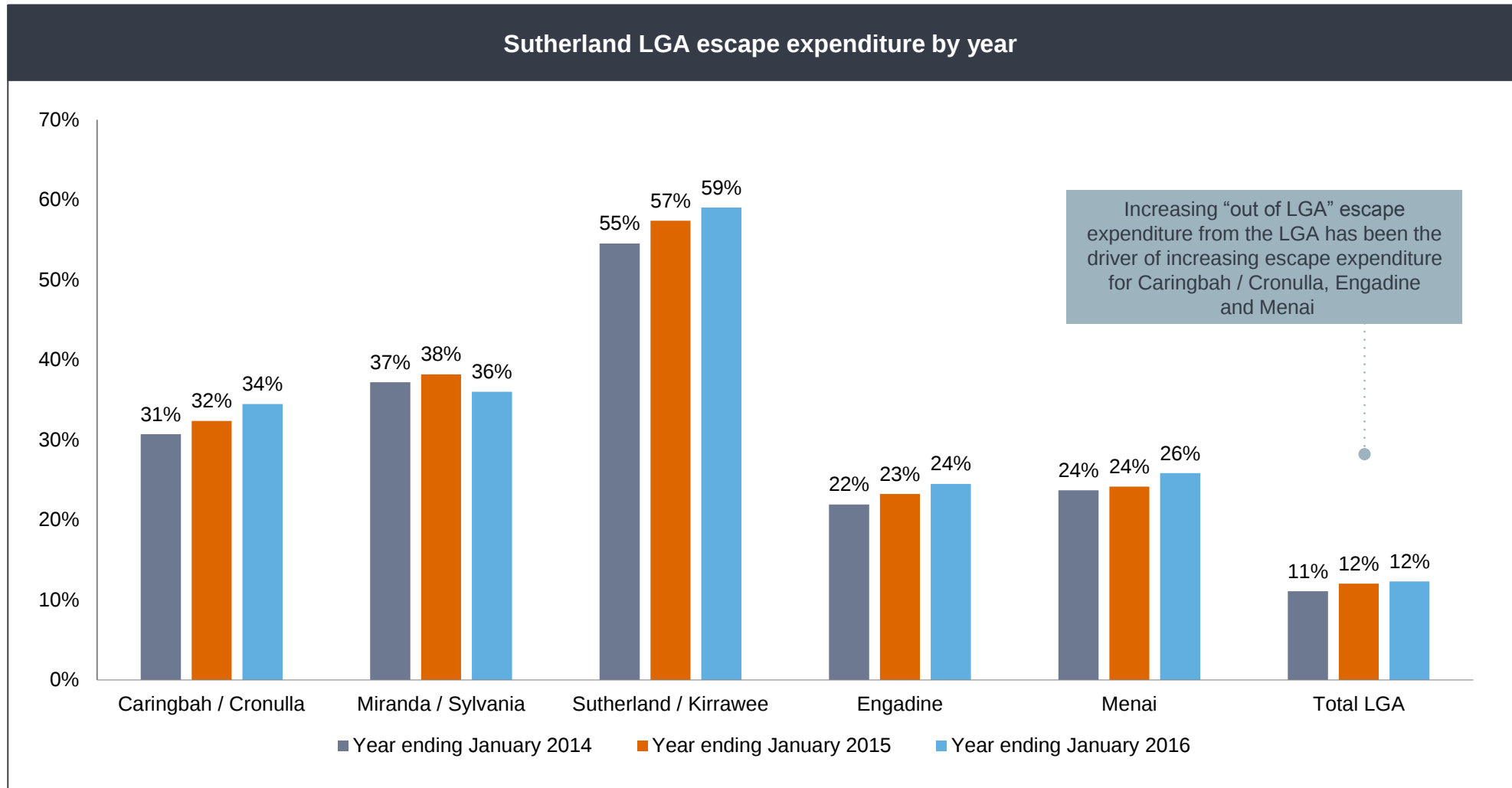
Residents of the Sutherland / Kirrawee area spend a significantly higher proportion of their supermarket spend outside their local area of convenience relative to the other Sutherland LGA areas

Sutherland / Kirrawee escape expenditure by year



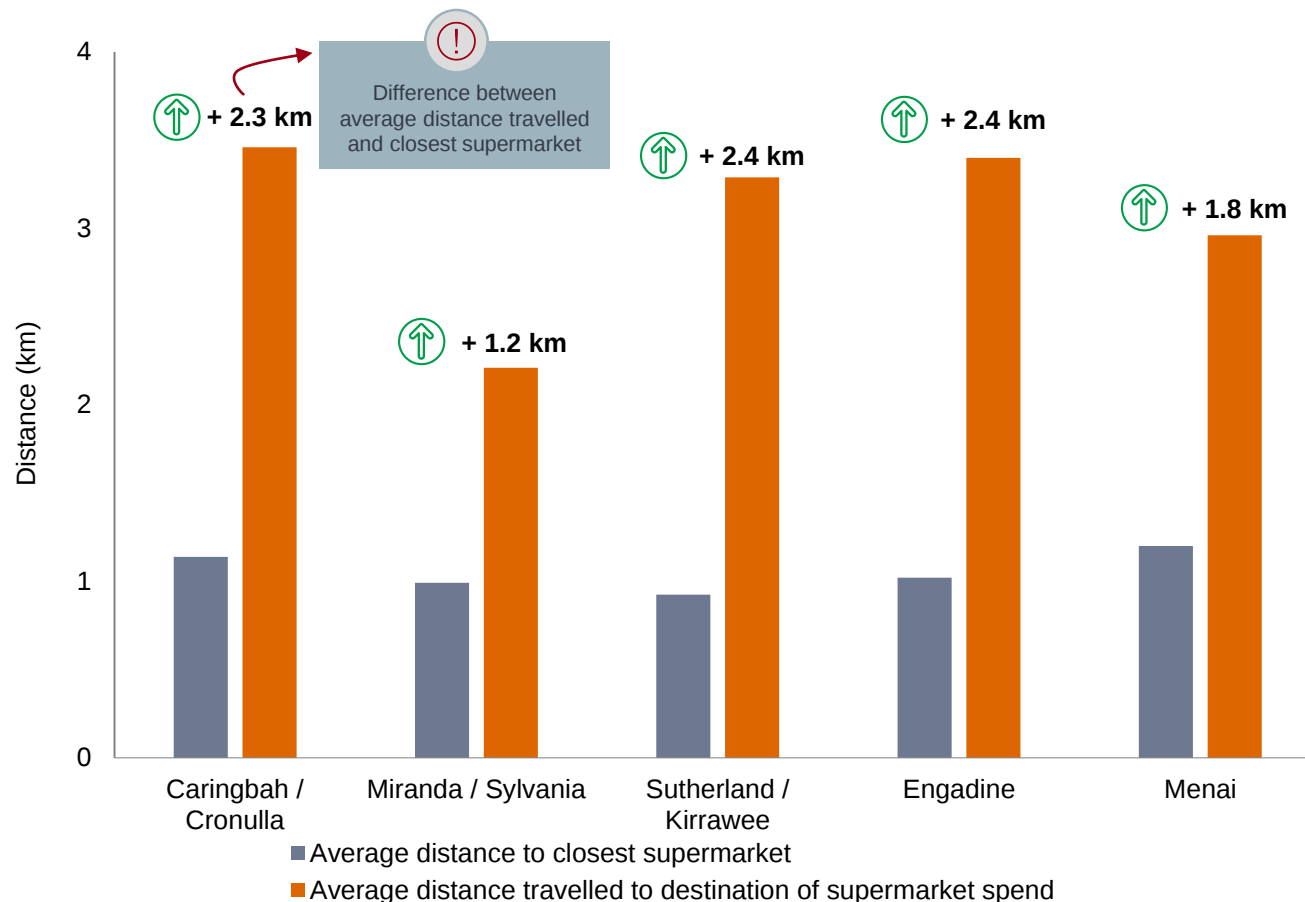
Sutherland / Kirrawee residents proportion of supermarket spend outside their local area of convenience has been consistently increasing since 2013

With the exception of Miranda / Sylvania, escape expenditure across the Sutherland LGA has consistently increased between 2013 and 2015



On average Sutherland / Kirrawee and Caringbah / Cronulla residents travel 2.4km in excess of their nearest supermarket to complete supermarket missions

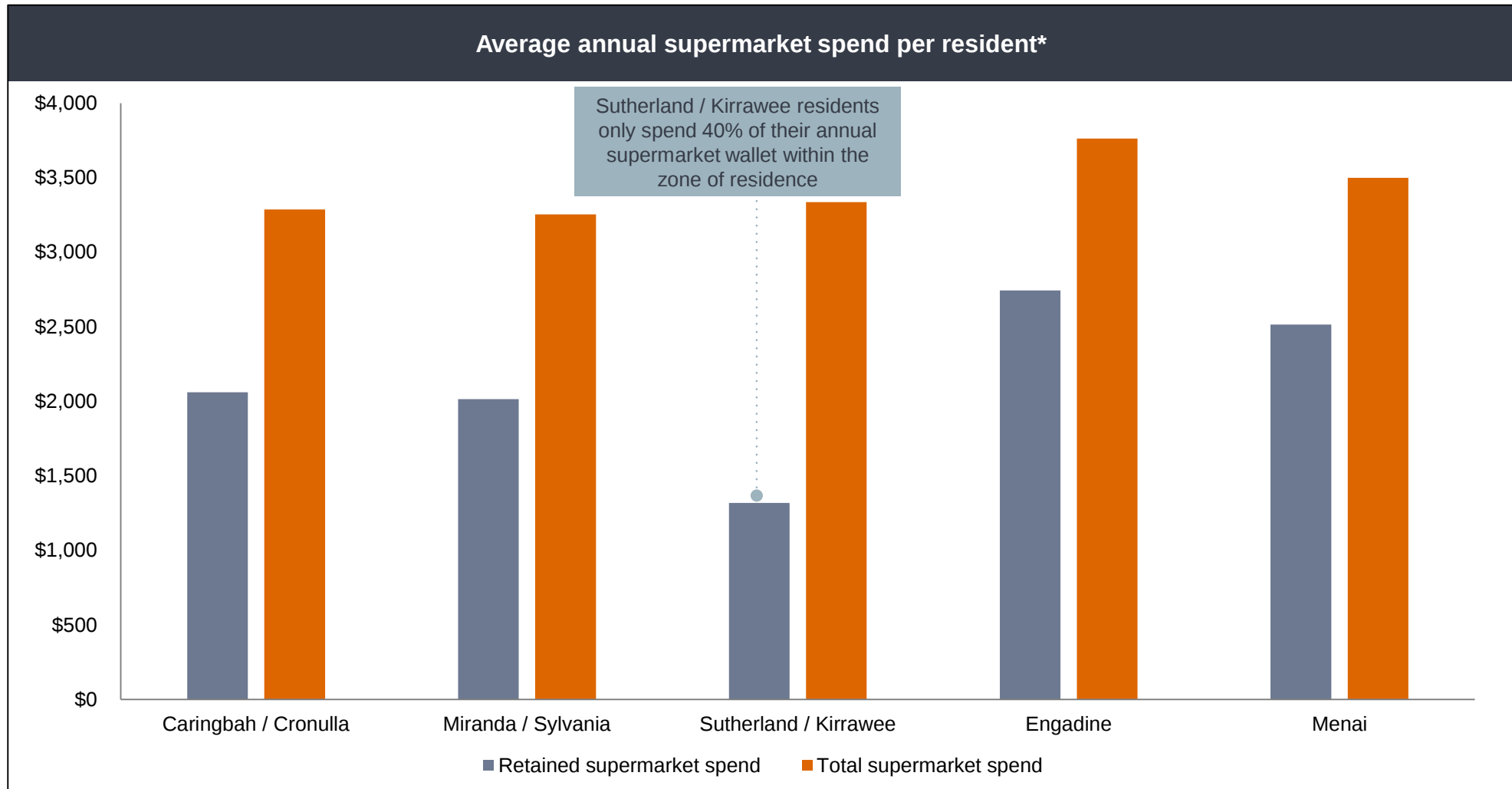
Average distance travelled to supermarkets by residents



- The distance travelled beyond the nearest supermarket indicates that the residents nearest supermarket offering is not the one they are using
- On average, Sutherland / Kirrawee zone residents travelled **143km** per resident further than the nearest supermarket to fulfil their supermarket missions over the full year ending January 2016

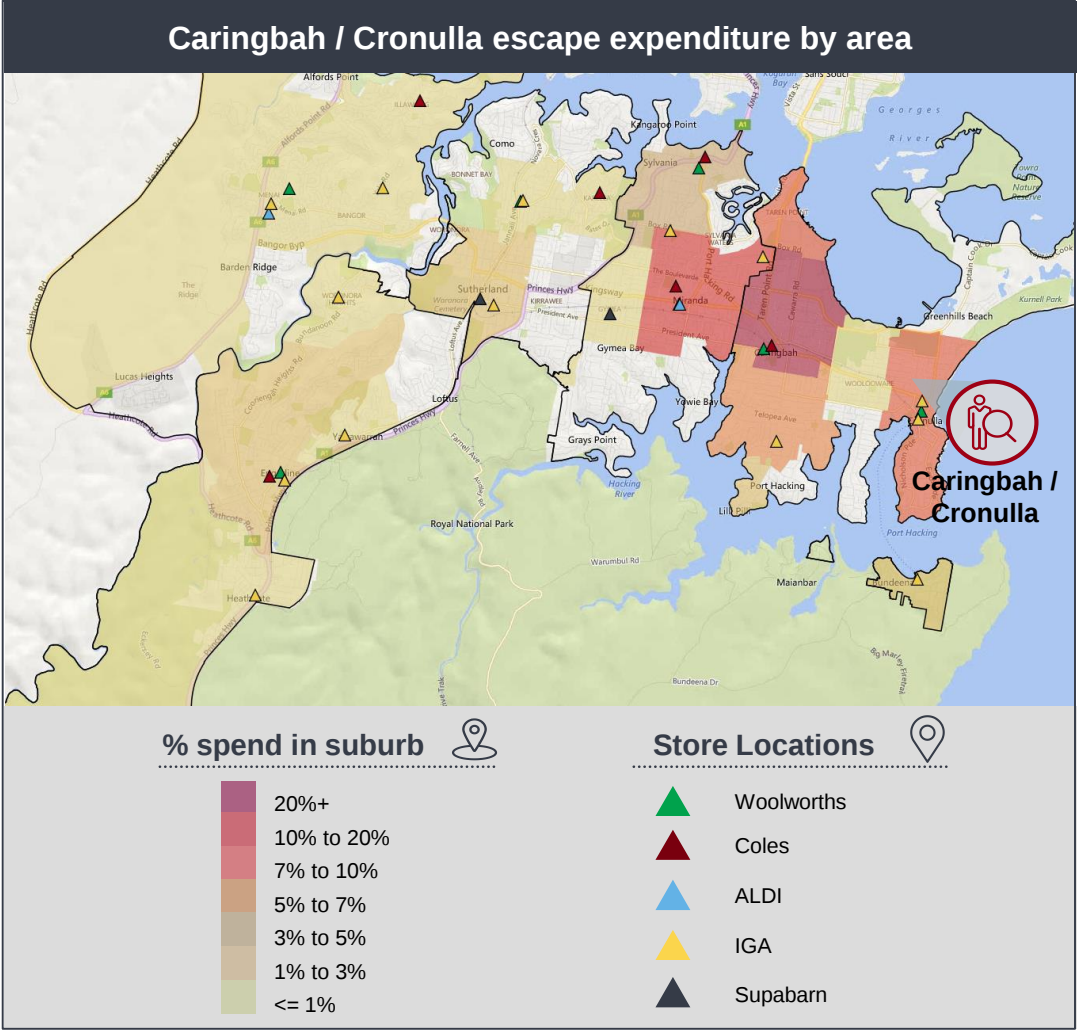
* Average distance is weighted by customers supermarket transactions. Includes only transactions made in Sutherland LGA

Sutherland / Kirrawee residents spend a small proportion of their total supermarket wallet in their area of convenience compared to the other LGA zones



* Annual supermarket spend per resident includes electronic spend only

Caringbah / Cronulla residents supermarket spend is predominately captured within Caringbah and Miranda



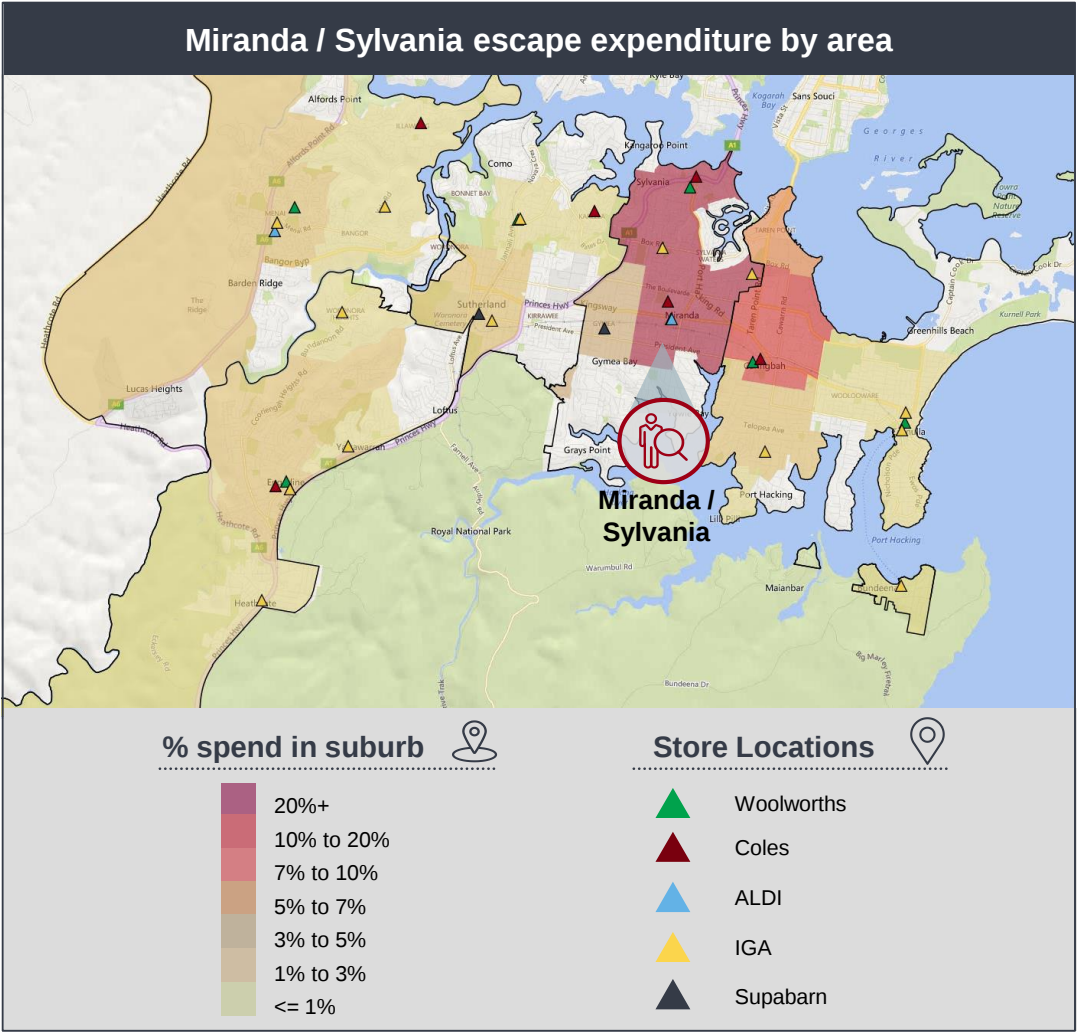




Resident Zone

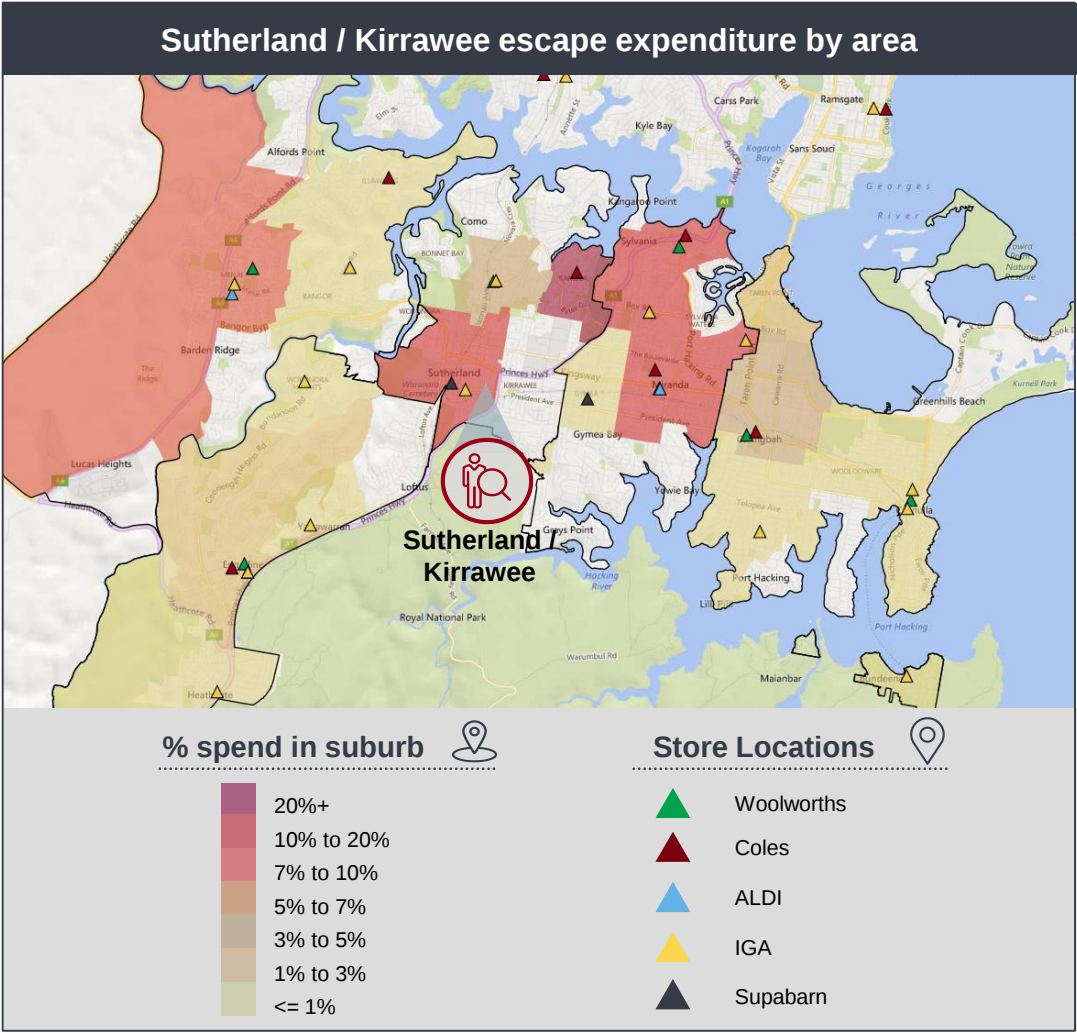
Zone of expenditure	Caringbah / Cronulla	66%
	Miranda / Sylvania	19%
	Sutherland / Kirrawee	1%
	Engadine	1%
	Menai	1%
	Outside Sutherland LGA	12%
	Total	100%

Miranda / Sylvania residents supermarket spend is predominately captured within Miranda, Sylvania and Caringbah



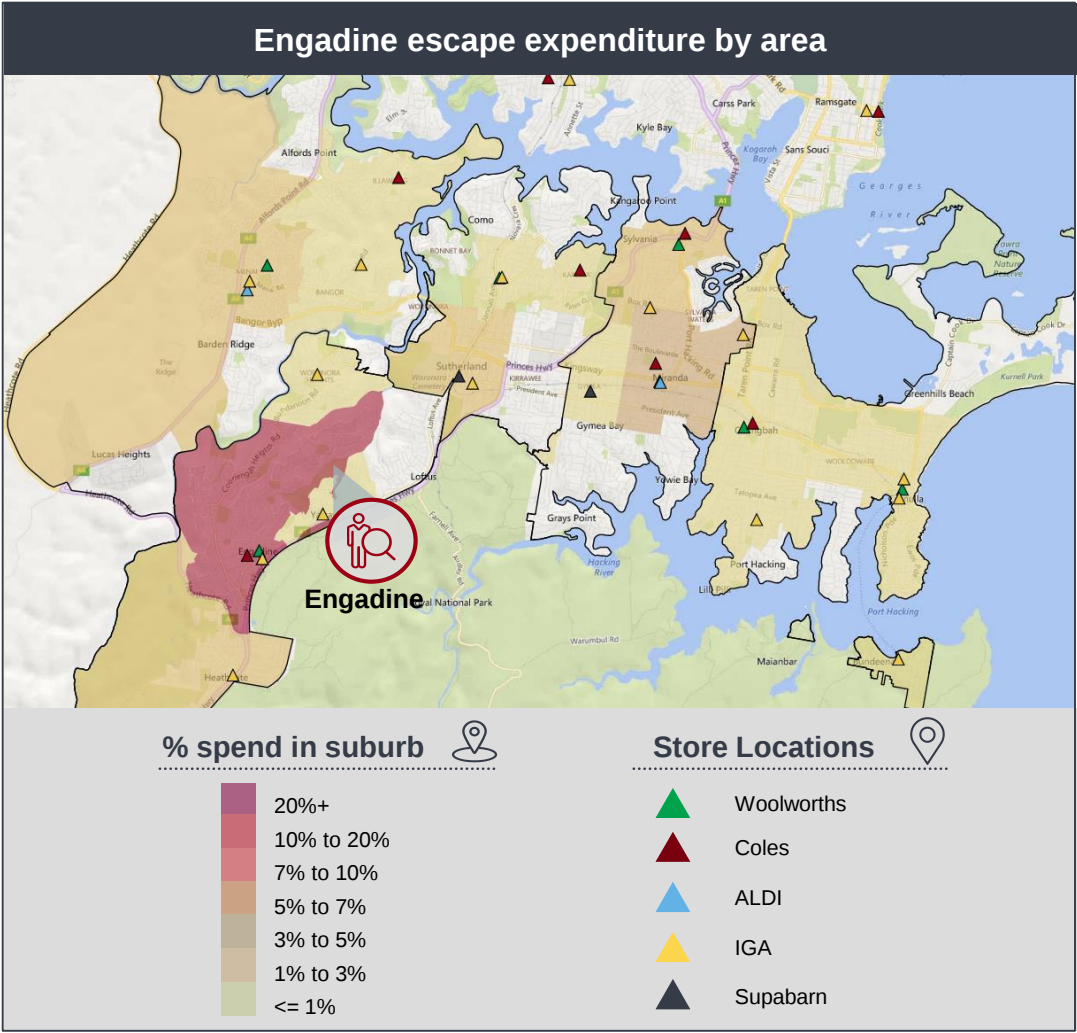
Resident Zone		
Miranda / Sylvania		
Zone of expenditure	Caringbah / Cronulla	19%
	Miranda / Sylvania	64%
	Sutherland / Kirrawee	2%
	Engadine	1%
	Menai	1%
	Outside Sutherland LGA	12%
Total		100%

Sutherland / Kirrawee residents have significant escape expenditure to Miranda, Sylvania and Menai



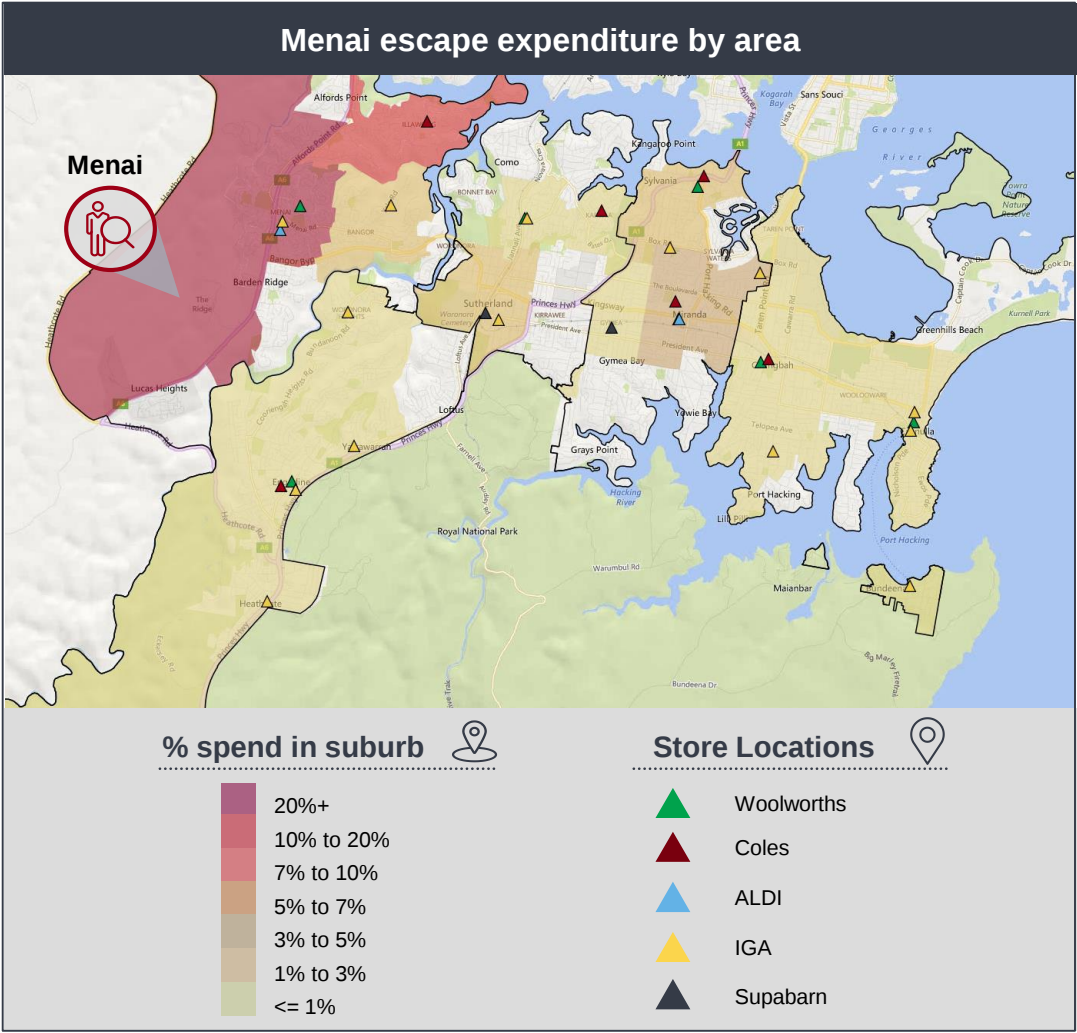
Zone of expenditure	Resident Zone	
	Sutherland / Kirrawee	
	Caringbah / Cronulla	7%
	Miranda / Sylvania	29%
	Sutherland / Kirrawee	41%
	Engadine	3%
	Menai	8%
	Outside Sutherland LGA	12%
Total	100%	

Engadine residents supermarket spend is predominately captured within the Engadine suburb



Resident Zone		
Engadine		
Zone of expenditure	Caringbah / Cronulla	2%
	Miranda / Sylvania	6%
	Sutherland / Kirrawee	3%
	Engadine	76%
	Menai	3%
	Outside Sutherland LGA	10%
Total		100%

Menai residents supermarket spend is predominately captured within Menai and Illawong



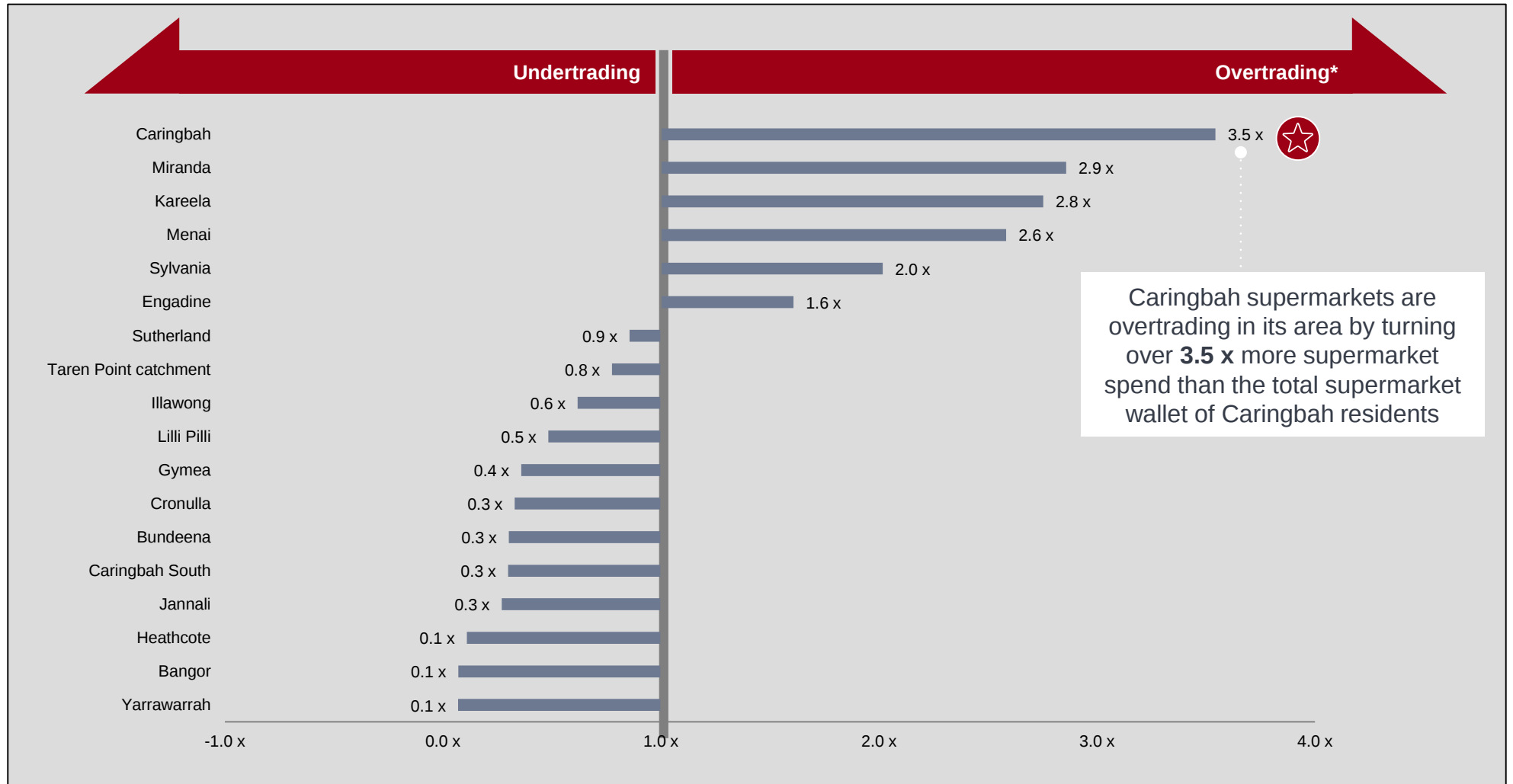
		Resident Zone
		Menai
Zone of expenditure	Caringbah / Cronulla	1%
	Miranda / Sylvania	5%
	Sutherland / Kirrawee	2%
	Engadine	1%
	Menai	74%
	Outside Sutherland LGA	16%
Total		100%

Agenda

- 1 Executive summary
- 2 Sutherland LGA by zone
- 3 Sutherland LGA by suburb**
- 4 Taren Point deep-dive
- 5 Appendix

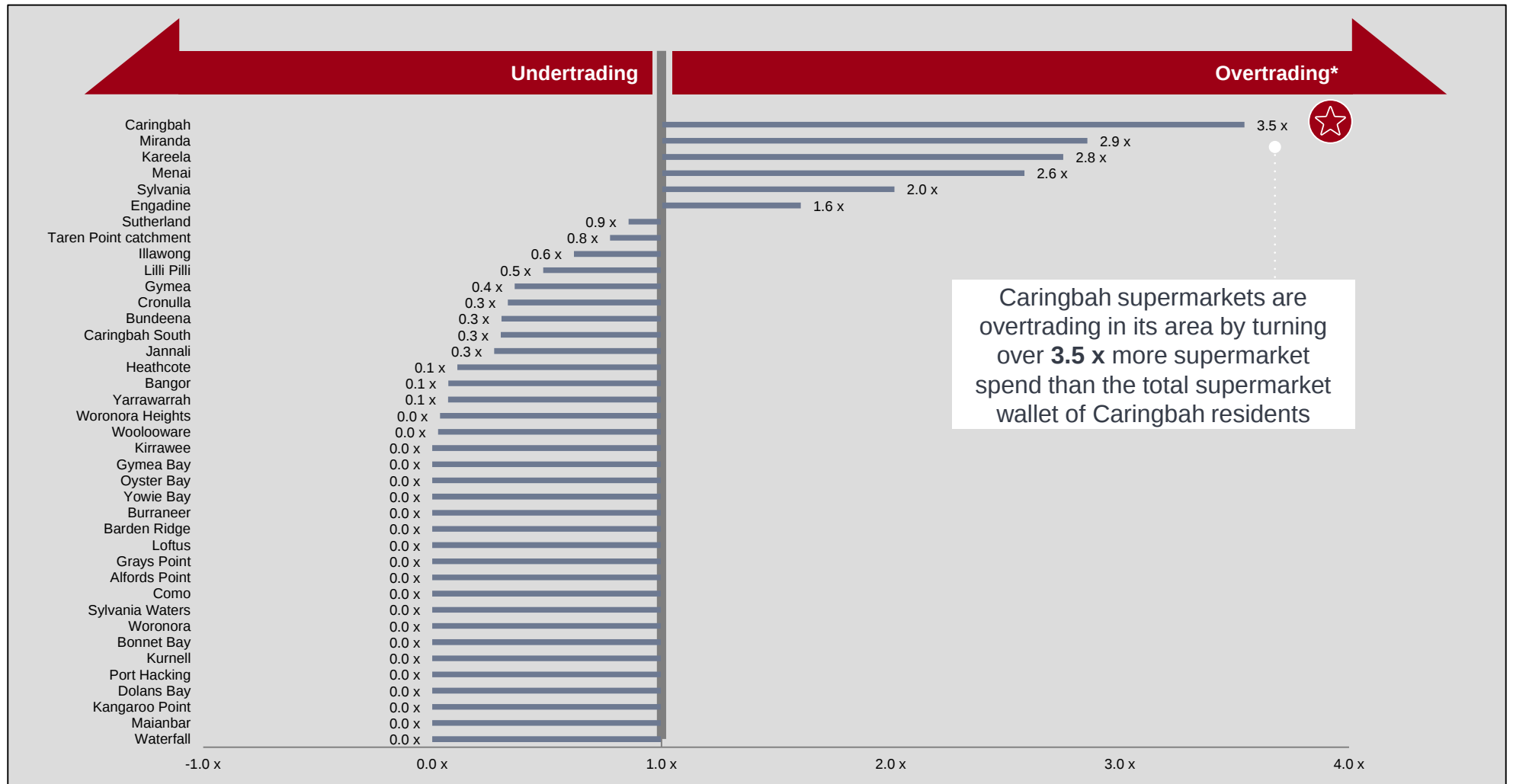


Supermarkets in Caringbah, Miranda and Kareela are overtrading relative to the supermarket spend of its residents. Jannali and Taren Point are undertrading



* Overtrading/undertrading is measured by total supermarket spend to the suburb v total supermarket spend from residents of the suburb, standardising for supermarket spend of residents; all spend is limited to Sutherland LGA residents

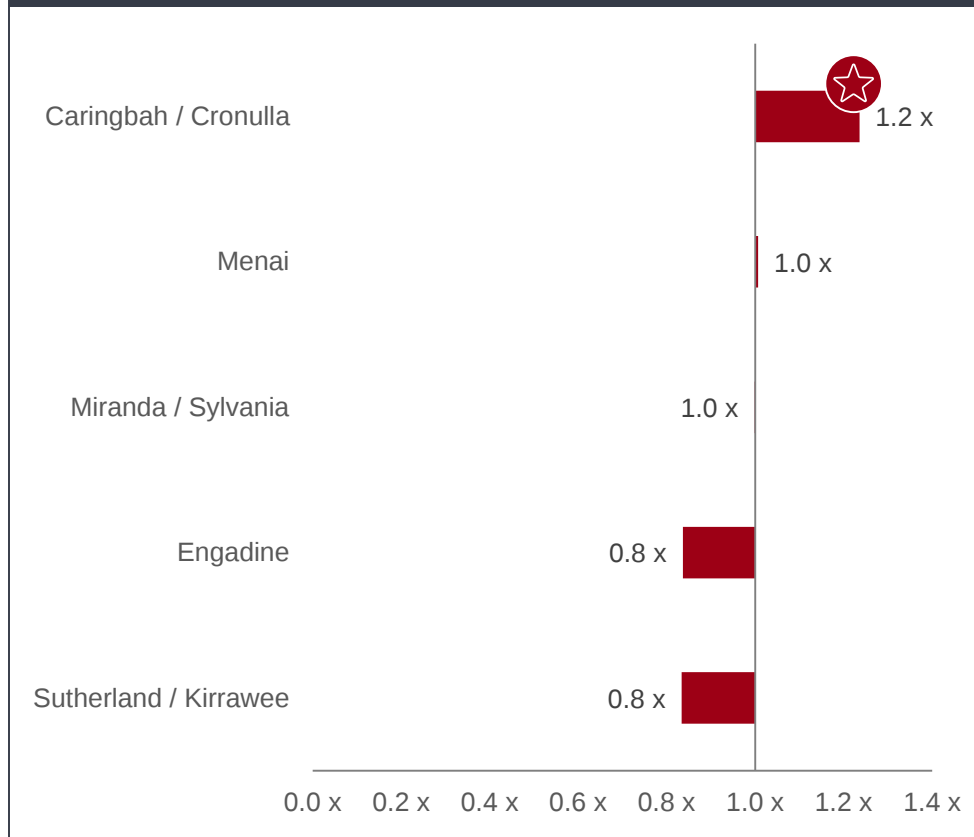
Suburbs which are overtrading relative to resident spend are Caringbah and Miranda. Jannali, Cronulla and Taren Point are undertrading



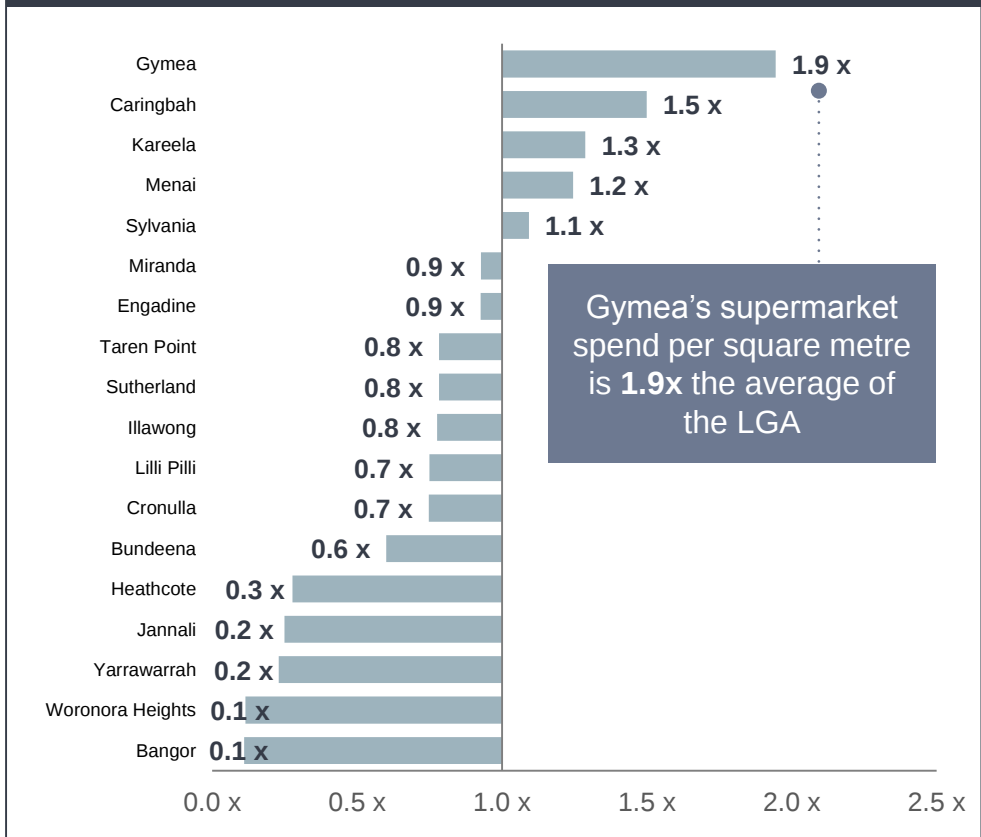
* Overtrading/undertrading is measured by total supermarket spend to the suburb v total supermarket spend from residents of the suburb, standardising for supermarket spend of residents; all spend is limited to Sutherland LGA residents

Relative to GLA, Caringbah, Kareela and Menai supermarkets are overtrading and Jannali, Sutherland and Taren Point supermarkets are undertrading

Supermarket spend per Sqm* – Zone level



Supermarket spend per Sqm* – Suburb level



* Supermarket spend per sqm is quoted relative to the average supermarket spend per sqm of the Sutherland LGA; All spend is limited to Sutherland LGA residents

The escape expenditure from Cronulla, Kurnell, Woollooware and Burraneer shows that they prefer to travel to Caringbah and Miranda than utilise Cronulla

% of supermarket spend		Caringbah / Cronulla Residents							
Zone of expenditure		Burraneer	Caringbah	Caringbah South	Cronulla	Kurnell	Taren Point	Woollooware	Caringbah / Cronulla Residents
	Caringbah	50.3%	44.8%	57.3%	30.0%	29.6%	9.5%	40.6%	41%
	Taren Point	5.7%	11.8%	3.2%	8.0%	17.0%	39.8%	6.1%	8.0%
	Cronulla	7.2%	1.7%	1.9%	21.7%	5.0%	0.6%	8.5%	8.4%
	Caringbah South	6.4%	7.6%	7.5%	4.0%	3.4%	0.5%	9.1%	5.6%
	Lilli Pilli	0.7%	0.1%	3.3%	0.1%	0.0%	0.0%	0.2%	1.4%
	Bundeena	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	1.2%
	Woollooware	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	0.6%	0.2%
	Miranda	13.9%	16.2%	12.6%	15.4%	17.4%	17.0%	17.3%	14.5%
	Sylvania	3.0%	4.0%	2.9%	3.6%	6.5%	17.9%	4.9%	4.2%
	Gymea	0.2%	0.2%	0.3%	0.1%	0.1%	0.1%	0.0%	0.2%
	Kareela	0.1%	0.2%	0.1%	0.2%	0.1%	0.6%	1.0%	0.3%
	Jannali	0.0%	0.1%	0.0%	0.0%	0.2%	0.1%	0.1%	0.0%
	Sutherland	0.6%	0.5%	0.3%	0.5%	0.4%	0.3%	0.3%	1.1%
	Engadine	0.5%	1.0%	0.7%	0.5%	0.4%	1.6%	1.6%	1.5%
	Heathcote	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Yarrawarrah	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	0.3%	0.8%	0.4%	0.8%	0.3%	0.4%	0.8%	0.8%
	Illawong	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	0.1%
	Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out of Sutherland LGA	11.0%	10.7%	8.9%	14.5%	19.5%	11.6%	8.6%	11.9%
	TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

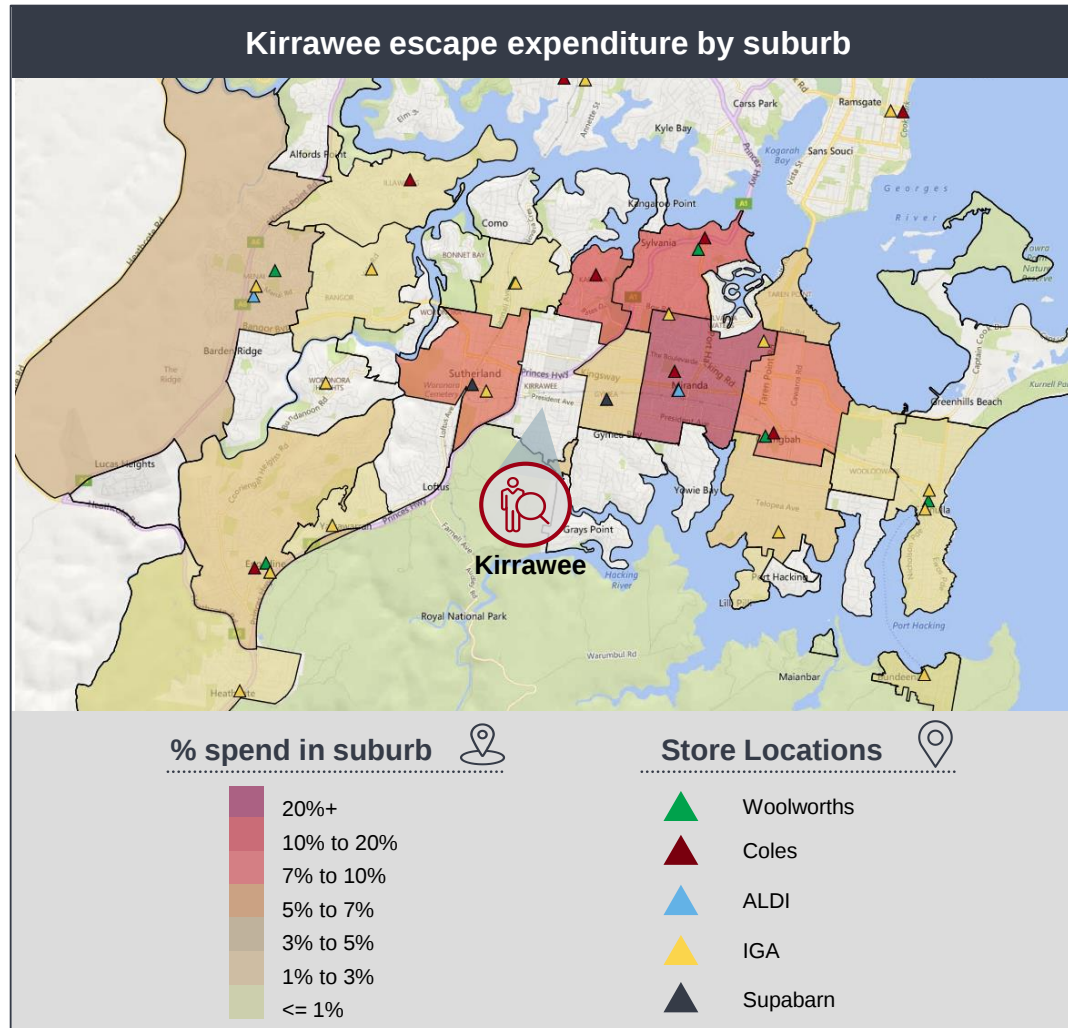
Miranda / Sylvania residents have some escape expenditure to Caringbah but otherwise spend is contained within Miranda and Sylvania

% of supermarket spend		Miranda / Sylvania Residents						
Zone of expenditure		Gymea	Gymea Bay	Miranda	Sylvania	Sylvania Waters	Yowie Bay	Miranda / Sylvania Residents
	Caringbah / Cronulla							
	Caringbah	11.5%	18.3%	10.8%	2.3%	4.5%	30.6%	12.0%
	Taren Point	2.5%	2.9%	8.5%	5.9%	14.9%	3.3%	5.6%
	Cronulla	0.7%	0.6%	0.5%	0.4%	0.2%	1.2%	0.6%
	Caringbah South	1.2%	0.8%	1.1%	0.2%	0.3%	1.9%	0.9%
	Lilli Pilli	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bundeena	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
	Woollooware	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Miranda / Sylvania							
	Miranda	48.6%	41.8%	55.3%	13.8%	17.9%	39.2%	38.1%
	Sylvania	11.0%	9.2%	9.0%	58.2%	43.3%	8.6%	21.8%
	Gymea	10.7%	9.1%	0.7%	0.3%	0.0%	1.7%	4.1%
	Sutherland / Kirrawee							
	Kareela	0.7%	0.4%	0.5%	1.3%	0.8%	0.2%	0.7%
	Jannali	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
	Sutherland	1.3%	2.9%	0.5%	0.3%	0.3%	1.3%	1.5%
	Engadine	1.7%	1.3%	0.5%	0.6%	0.4%	0.6%	1.1%
	Engadine							
	Heathcote	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
	Yarrawarrah	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
	Menai							
	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	1.0%	1.2%	0.8%	0.7%	0.3%	1.0%	1.2%
	Illawong	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
	Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out of Sutherland LGA	8.9%	11.2%	11.4%	15.8%	17.1%	10.1%	12.3%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Sutherland / Kirrawee residents have escape expenditure to Miranda and Sylvania with Kareela being the only area within the zone capturing significant spend

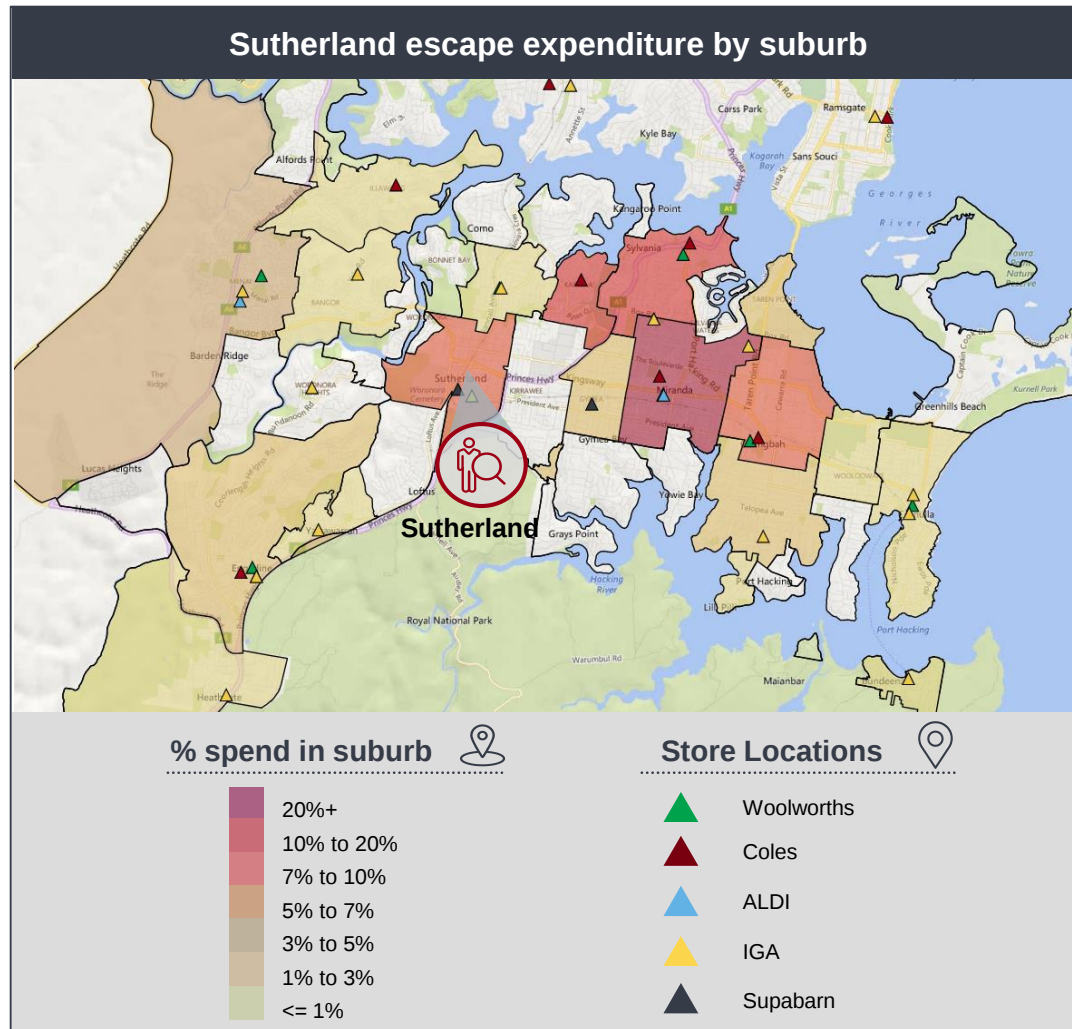
% of supermarket spend		Sutherland / Kirrawee Residents							
Zone of expenditure		Bonnet Bay	Como	Jannali	Kareela	Kirrawee	Oyster Bay	Sutherland	Sutherland / Kirrawee Residents
	Caringbah	1.3%	3.4%	3.1%	3.5%	9.9%	1.5%	3.8%	4.5%
	Taren Point	0.4%	0.6%	0.7%	1.1%	1.9%	1.8%	0.9%	1.2%
	Cronulla	0.9%	0.6%	0.2%	0.5%	0.6%	0.4%	0.4%	0.5%
	Caringbah South	0.1%	0.2%	0.6%	0.2%	1.0%	0.2%	0.3%	0.5%
	Lilli Pilli	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bundeena	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woolooware	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Miranda	12.5%	9.4%	10.3%	12.2%	34.6%	12.4%	17.6%	18.1%
	Sylvania	6.6%	9.8%	9.0%	13.5%	11.5%	12.6%	8.6%	10.5%
	Gymea	0.3%	0.2%	0.2%	0.1%	2.8%	0.1%	0.3%	0.8%
	Kareela	14.8%	32.5%	35.0%	55.3%	13.3%	49.4%	4.1%	26.5%
	Jannali	5.3%	6.6%	11.8%	0.9%	0.3%	3.0%	0.8%	3.3%
	Sutherland	11.8%	9.0%	6.0%	0.7%	8.4%	2.5%	30.0%	11.1%
	Engadine	1.5%	1.1%	2.9%	1.1%	2.8%	1.0%	5.1%	2.6%
	Heathcote	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Yarrawarrah	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	31.7%	13.0%	8.4%	2.7%	3.1%	4.8%	11.8%	8.4%
	Illawong	0.3%	0.1%	0.0%	0.1%	0.0%	0.1%	0.2%	0.1%
	Bangor	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out of Sutherland LGA	12.6%	13.2%	11.5%	8.2%	9.8%	10.3%	16.0%	11.7%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Sutherland / Kirrawee – Kirrawee deep-dive



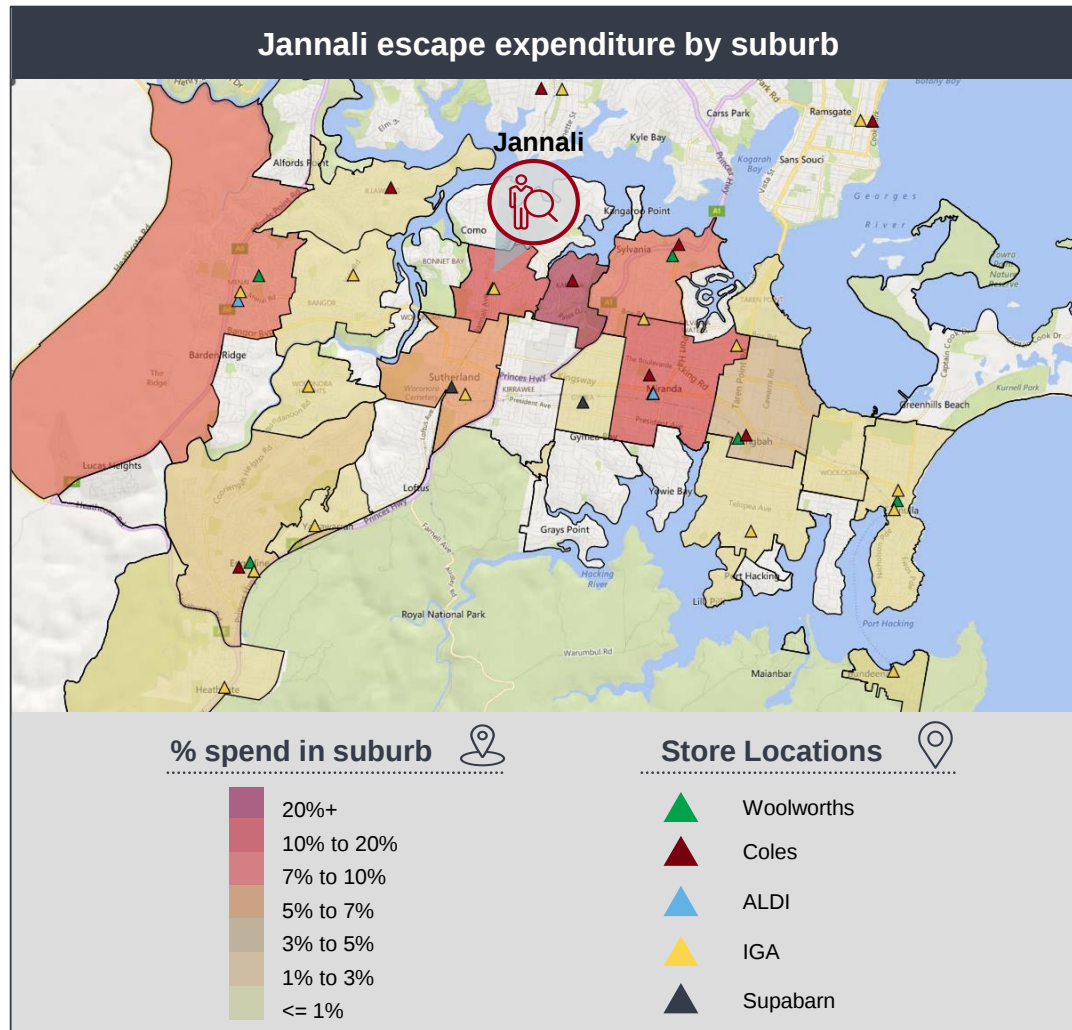
		Resident Suburb		
 Zone of expenditure		 Kirrawee		
	Caringbah / Cronulla	Caringbah		10%
		Taren Point		2%
		Cronulla		1%
		Caringbah South		1%
		Lilli Pilli		0%
		Bundeena		0%
		Woollooware		0%
	Miranda / Sylvania	Miranda		35%
		Sylvania		11%
		Gymea		3%
	Sutherland / Kirrawee	Kareela		13%
		Jannali		0%
		Sutherland		8%
	Engadine	Engadine		3%
		Heathcote		0%
		Yarrawarrah		0%
	Menai	Woronora Heights		0%
		Menai		3%
		Illawong		0%
		Bangor		0%
Out of Sutherland LGA			10%	
TOTAL			100%	

Sutherland / Kirrawee – Sutherland deep-dive



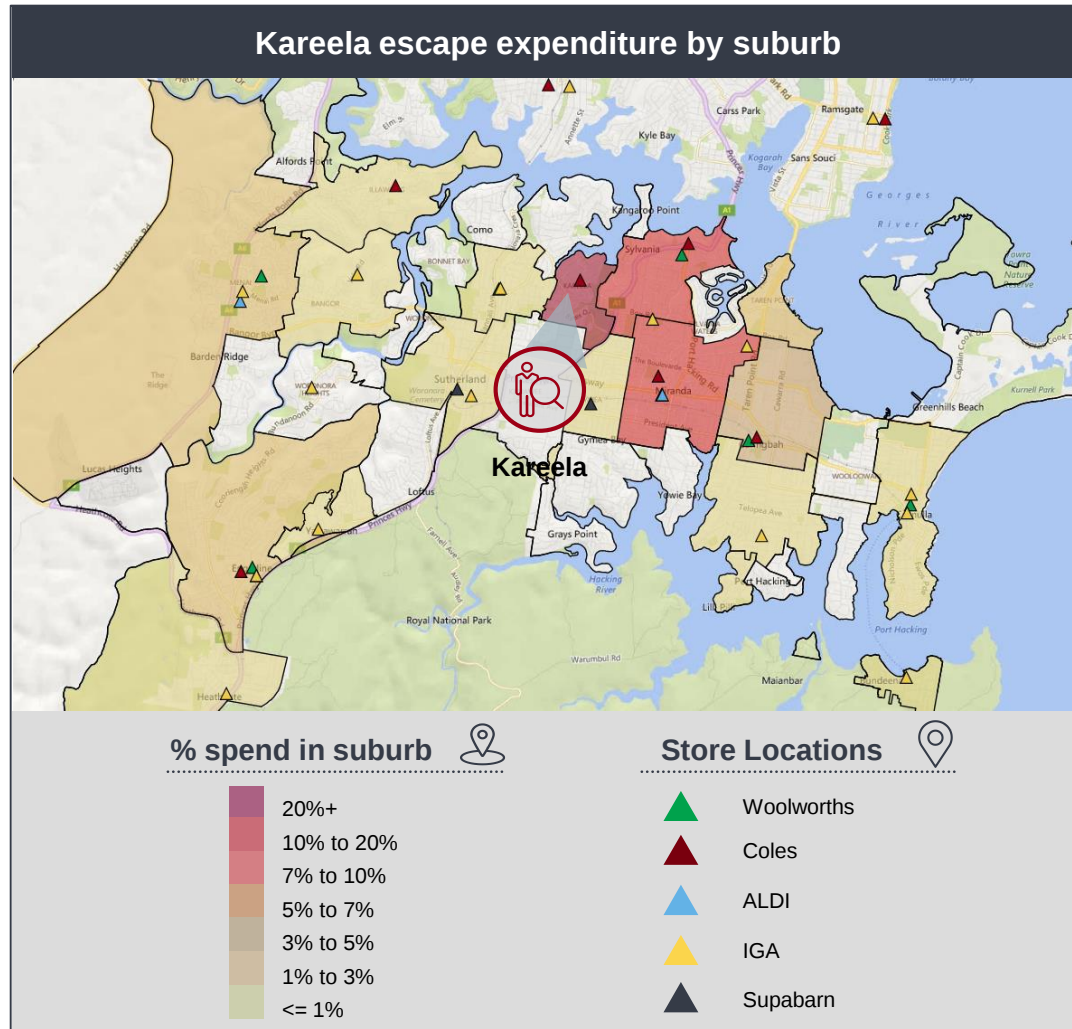
		Resident Suburb	
			Sutherland
Zone of expenditure	Caringbah / Cronulla	Caringbah	4%
		Taren Point	1%
		Cronulla	0%
		Caringbah South	0%
		Lilli Pilli	0%
		Bundeena	0%
		Woollooware	0%
	Miranda / Sylvania	Miranda	18%
		Sylvania	9%
		Gymea	0%
	Sutherland / Kirrawee	Kareela	4%
		Jannali	1%
		Sutherland	30%
	Engadine	Engadine	5%
		Heathcote	0%
		Yarrawarrah	0%
	Menai	Woronora Heights	0%
		Menai	12%
		Illawong	0%
		Bangor	0%
	Out of Sutherland LGA		16%
	TOTAL		100%

Sutherland / Kirrawee – Jannali deep-dive



		Resident Suburb	
		Jannali	
Zone of expenditure	Caringbah / Cronulla	Caringbah	3%
		Taren Point	1%
		Cronulla	0%
		Caringbah South	1%
		Lilli Pilli	0%
		Bundeena	0%
		Woolooware	0%
	Miranda / Sylvania	Miranda	10%
		Sylvania	9%
		Gymea	0%
	Sutherland / Kirrawee	Kareela	35%
		Jannali	12%
		Sutherland	6%
	Engadine	Engadine	3%
		Heathcote	0%
		Yarrawarrah	0%
	Menai	Woronora Heights	0%
		Menai	8%
		Illawong	0%
		Bangor	0%
	Out of Sutherland LGA		12%
	TOTAL		100%

Sutherland / Kirrawee – Kareela deep-dive



		Resident Suburb	
		Kareela	
Zone of expenditure	Caringbah / Cronulla	Caringbah	3%
		Taren Point	1%
		Cronulla	1%
		Caringbah South	0%
		Lilli Pilli	0%
		Bundeena	0%
	Miranda / Sylvania	Woollooware	0%
		Miranda	12%
		Sylvania	14%
	Sutherland / Kirrawee	Gymea	0%
		Kareela	55%
		Jannali	1%
	Engadine	Sutherland	1%
		Engadine	1%
		Heathcote	0%
	Menai	Yarrawarrah	0%
		Woronora Heights	0%
		Menai	3%
		Illawong	0%
		Bangor	0%
	Out of Sutherland LGA		8%
	TOTAL		100%

Engadine is the only suburb within the zone that attracts significant supermarket spend of residents

% of supermarket spend		Engadine Residents						
Zone of expenditure		Engadine	Heathcote	Loftus	Waterfall	Woronora Heights	Yarrawarrah	Engadine Residents
	Caringbah	0.6%	1.2%	1.9%	0.1%	1.4%	0.9%	1.0%
	Taren Point	0.7%	0.6%	1.8%	0.8%	1.0%	0.5%	0.8%
	Cronulla	0.1%	0.3%	0.2%	0.0%	0.2%	0.1%	0.2%
	Caringbah South	0.1%	0.1%	0.3%	0.2%	0.1%	0.0%	0.1%
	Lilli Pilli	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bundeena	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woollooware	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Miranda	2.4%	2.4%	11.0%	2.2%	2.7%	4.3%	3.6%
	Sylvania	2.0%	1.9%	5.5%	1.1%	3.1%	2.7%	2.6%
	Gymea	0.1%	0.1%	0.2%	0.1%	0.1%	0.1%	0.1%
	Kareela	0.4%	0.1%	1.2%	0.0%	0.3%	1.0%	0.5%
	Jannali	0.1%	0.0%	0.3%	0.0%	0.6%	0.0%	0.2%
	Sutherland	0.8%	1.0%	13.6%	0.3%	0.8%	3.0%	2.5%
	Engadine	82.0%	69.8%	41.4%	56.2%	74.1%	69.5%	72.9%
	Heathcote	0.2%	8.5%	0.1%	10.1%	0.2%	0.1%	1.6%
	Yarrawarrah	0.3%	0.1%	0.6%	0.0%	0.1%	3.9%	0.6%
	Woronora Heights	0.1%	0.0%	0.0%	0.1%	2.8%	0.0%	0.3%
	Menai	1.5%	3.6%	10.1%	1.2%	1.3%	2.9%	2.9%
	Illawong	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
	Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
Out of Sutherland LGA		8.5%	10.2%	11.5%	27.6%	11.2%	10.6%	9.9%
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

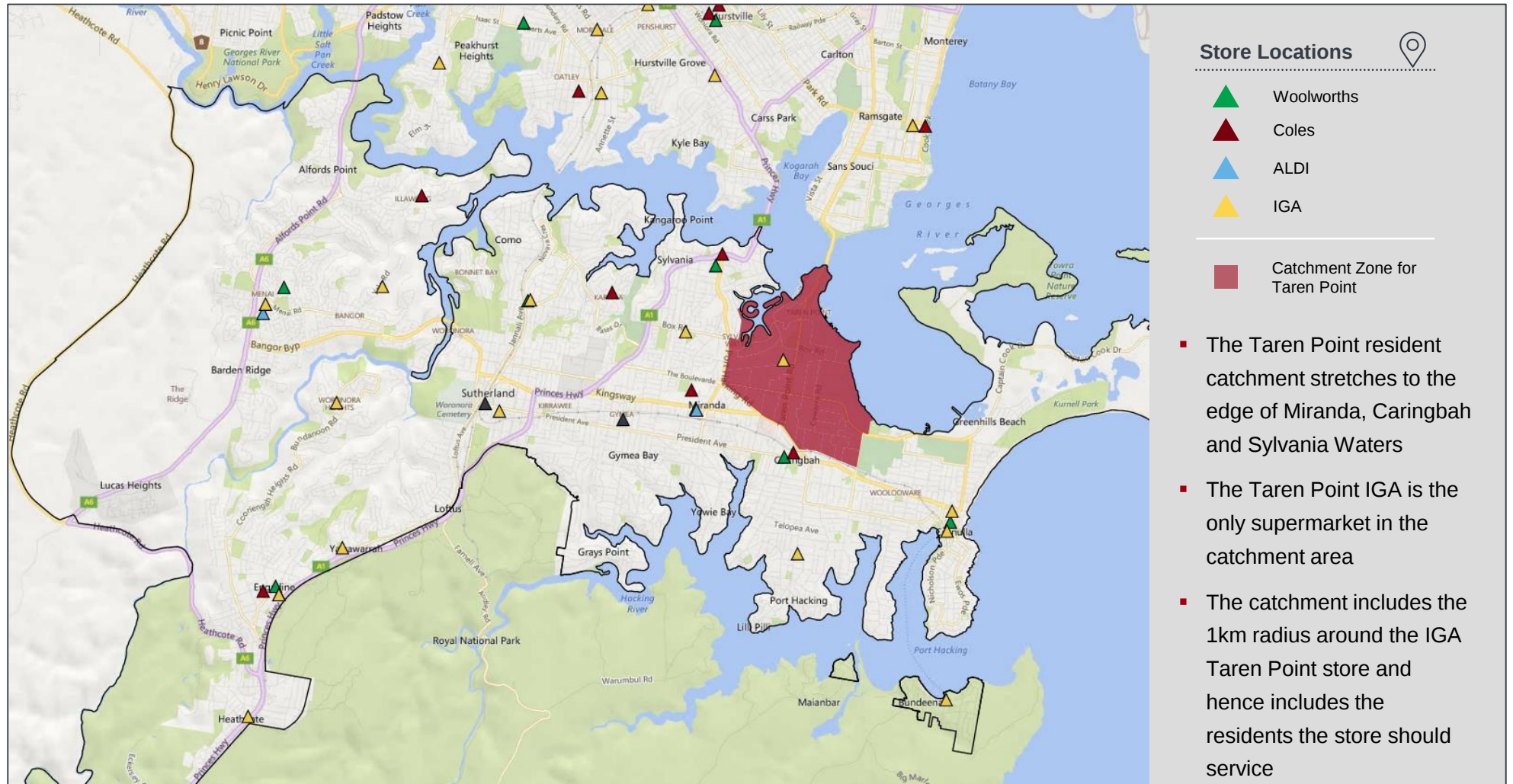
Illawong residents have significant escape expenditure to Menai

% of supermarket spend		Menai Residents						
Zone of expenditure		Alfords Point	Bangor	Barden Ridge	Illawong	Menai	Woronora	Menai Residents
	Caringbah	0.1%	1.2%	0.6%	0.4%	0.4%	2.3%	0.7%
	Taren Point	0.0%	0.3%	1.1%	0.2%	0.2%	3.3%	0.6%
	Cronulla	0.1%	0.2%	0.1%	0.1%	0.3%	0.6%	0.2%
	Caringbah South	0.0%	0.1%	0.0%	0.0%	0.1%	0.2%	0.1%
	Lilli Pilli	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bundeena	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woolooware	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Miranda	2.1%	5.0%	4.3%	2.3%	3.0%	8.4%	3.7%
	Sylvania	0.3%	2.4%	1.1%	0.5%	1.5%	5.1%	1.5%
	Gymea	0.0%	0.1%	0.1%	0.0%	0.1%	0.3%	0.1%
	Kareela	0.1%	0.2%	0.3%	0.1%	0.3%	2.0%	0.3%
	Jannali	0.1%	0.1%	0.1%	0.0%	0.2%	0.6%	0.2%
	Sutherland	0.1%	1.9%	0.8%	0.4%	0.7%	14.6%	1.8%
	Engadine	0.2%	0.6%	2.1%	0.1%	0.6%	1.1%	0.7%
	Heathcote	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
	Yarrawarrah	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	46.9%	67.1%	72.1%	34.5%	74.5%	49.9%	58.5%
	Illawong	27.6%	2.4%	2.0%	39.6%	4.5%	0.3%	14.6%
	Bangor	0.1%	4.2%	0.4%	0.1%	0.8%	1.0%	1.1%
Out of Sutherland LGA		22.3%	14.0%	14.6%	21.6%	12.8%	10.0%	16.2%
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

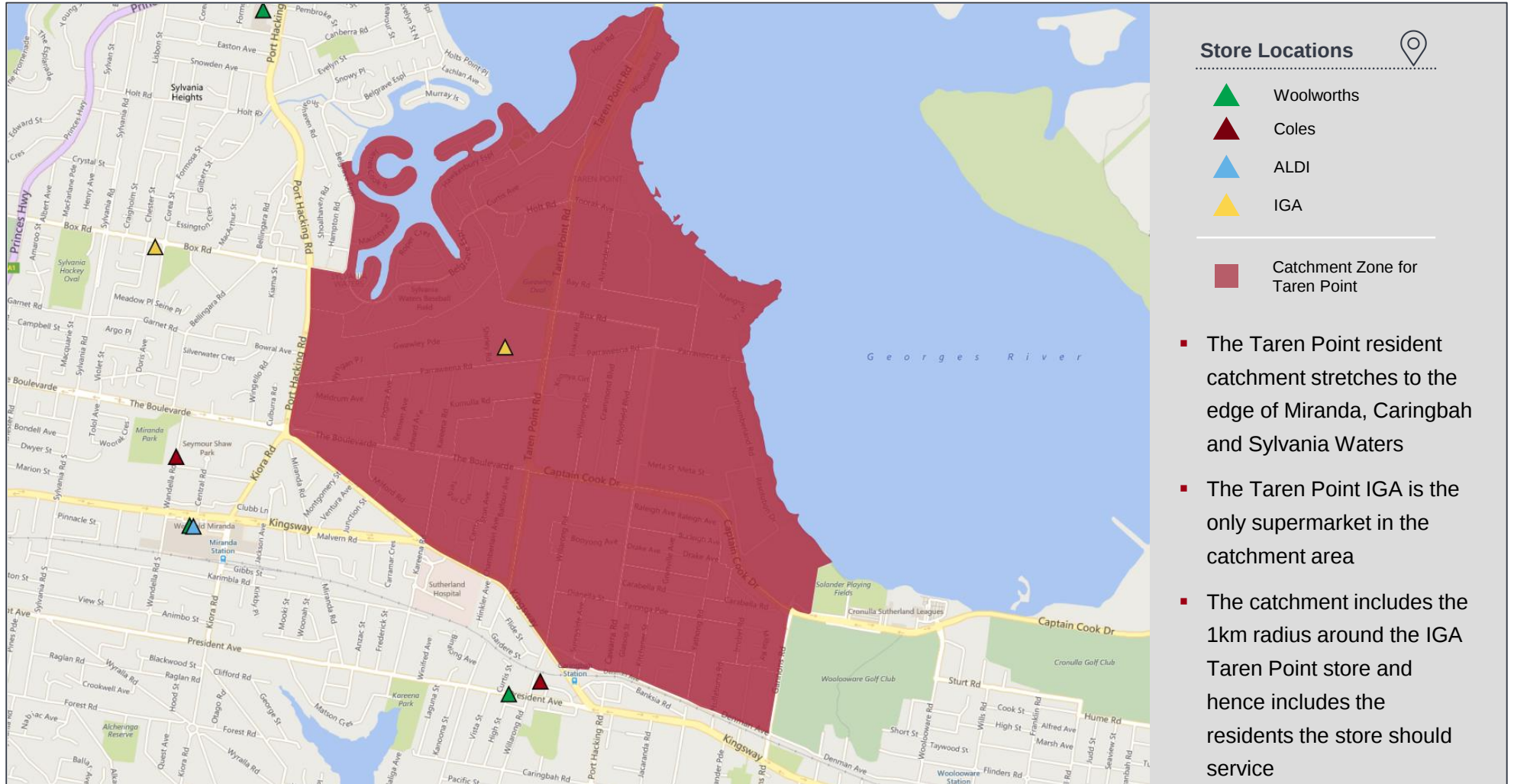
Agenda

- 1 Executive summary
- 2 Sutherland LGA by zone
- 3 Sutherland LGA by suburb
- 4 Taren Point deep-dive**
- 5 Appendix

Taren Point catchment map

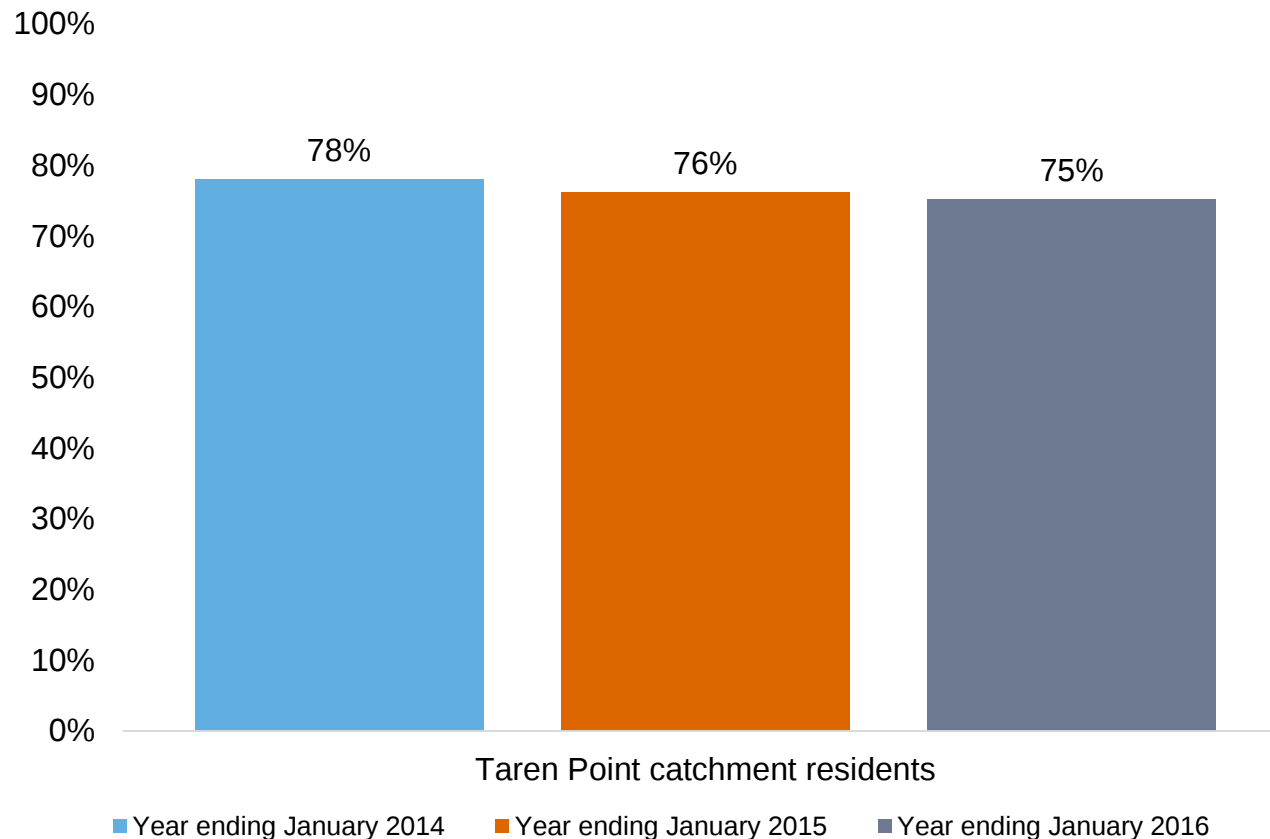


Taren Point catchment map



Taren Point catchment residents have a very high level of escape expenditure, particularly to Miranda and Caringbah

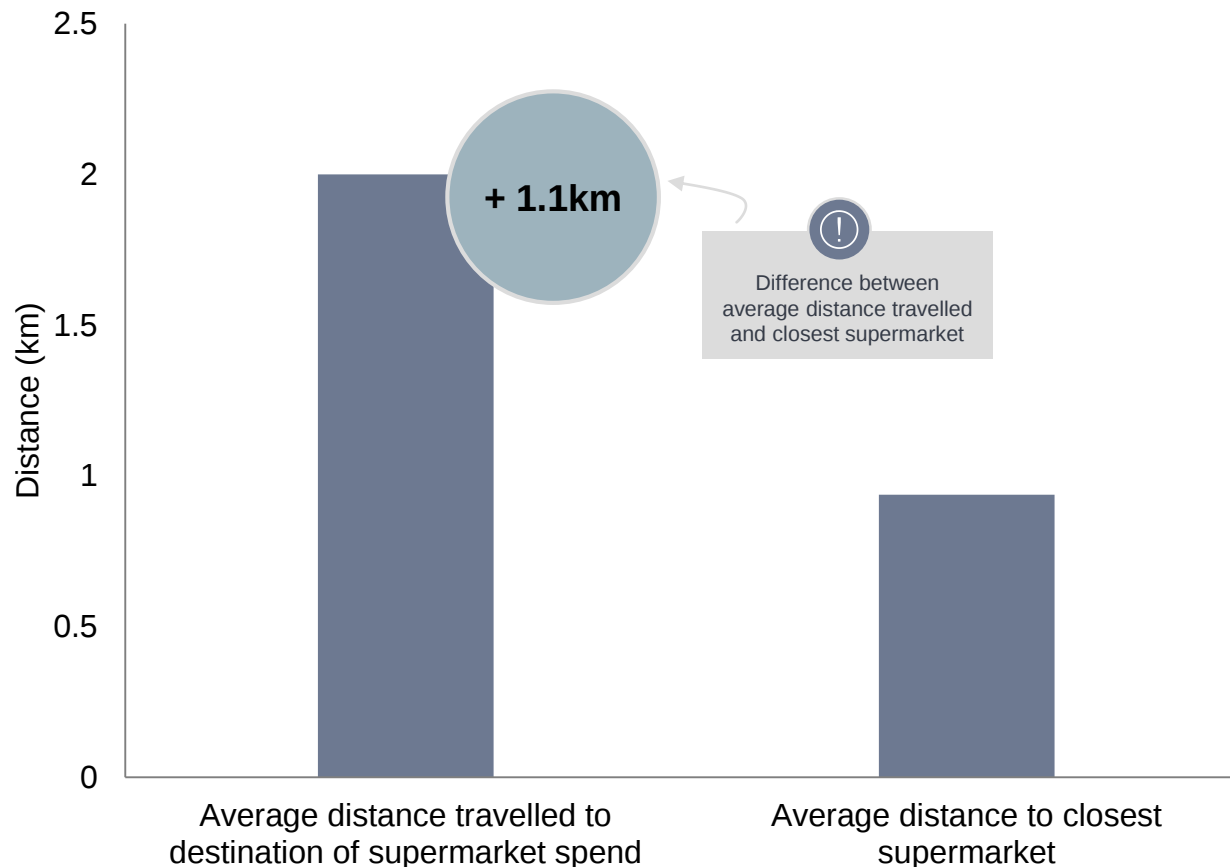
Taren Point catchment residents - escape expenditure by year



- 75% of supermarket spend by Taren Point catchment residents was conducted outside their local area of convenience in the year ending January 2016
- Escape expenditure from the Taren Point catchment has decreased over the past 3 years but remains at very high levels

On average, Taren Point catchment residents travel 1.1km in excess of their nearest supermarket to complete supermarket missions

Taren Point catchment residents - average distance travelled to supermarkets by residents

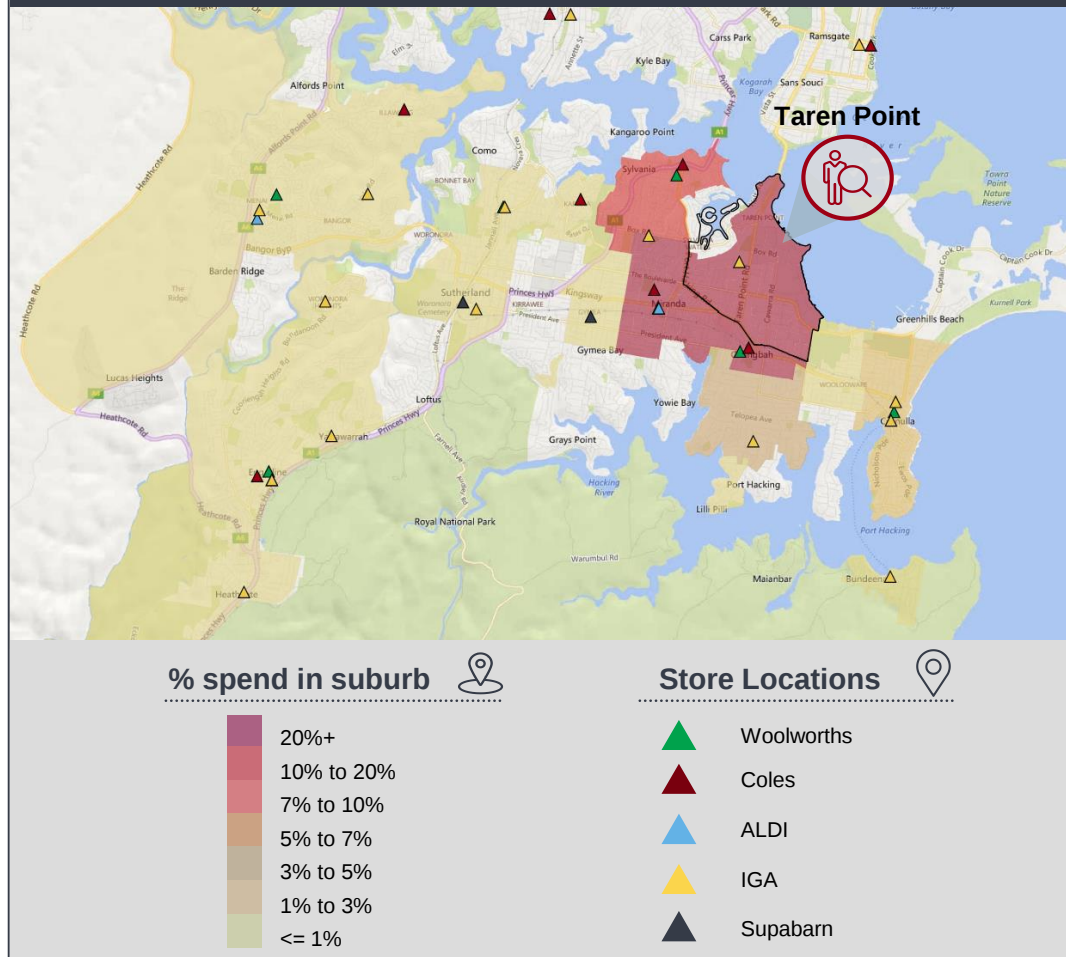


- The distance travelled beyond the nearest supermarket indicates that the residents nearest supermarket offering is not the one they are using
- On average, Taren Point residents travelled **61km** per resident further than the nearest supermarket to fulfil their supermarket missions over the full year ending January 2016

* Average distance is weighted by customers supermarket transactions. Includes only transactions made in Sutherland LGA

Taren Point catchment residents supermarket spend have a high level of escape expenditure to Caringbah, Miranda and Sylvania

Taren Point catchment residents - escape expenditure by suburb



		Resident area	
		Taren Point Catchment	
Caringbah / Cronulla	Caringbah	22%	
	Taren Point	25%	
	Cronulla	1%	
	Caringbah South	4%	
	Lilli Pilli	0%	
	Bundeena	0%	
	Woolooware	0%	
Miranda / Sylvania	Miranda	22%	
	Sylvania	12%	
	Gymea	0%	
Sutherland / Kirrawee	Kareela	0%	
	Jannali	0%	
	Sutherland	0%	
Engadine	Engadine	1%	
	Heathcote	0%	
	Yarrawarrah	0%	
Menai	Woronora Heights	0%	
	Menai	1%	
	Illawong	0%	
	Bangor	0%	
Out of Sutherland LGA		12%	
TOTAL		100%	

Agenda

1 Executive summary

2 Sutherland LGA by zone

3 Sutherland LGA by suburb

4 Taren Point deep-dive

5 Appendix

Escape expenditure in Sutherland LGA

% of supermarket spend		Resident Zone				
Zone of expenditure		Caringbah / Cronulla	Miranda / Sylvania	Sutherland / Kirrawee	Engadine	Menai
	Caringbah/Cronulla	65.5%	19.1%	6.7%	2.1%	1.5%
	Miranda/Sylvania	18.9%	64.0%	29.4%	6.3%	5.2%
	Sutherland/Kirrawee	1.4%	2.3%	41.0%	3.2%	2.2%
	Engadine	1.5%	1.1%	2.7%	75.5%	0.7%
	Menai	0.9%	1.2%	8.5%	3.0%	74.2%
	Out of Sutherland LGA	11.9%	12.3%	11.7%	9.9%	16.2%
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%

Caringbah / Cronulla residents escape expenditure by suburb

% of supermarket spend		Caringbah / Cronulla Residents												
Zone of expenditure		Bundeena	Burraneer	Caringbah	Caringbah South	Cronulla	Dolans Bay	Kurnell	Lilli Pilli	Maianbar	Port Hacking	Taren Point	Woolooware	Caringbah / Cronulla Residents
	Caringbah	6.8%	50.3%	44.8%	57.3%	30.0%	55.9%	29.6%	52.0%	10.2%	58.7%	9.5%	40.6%	41%
	Taren Point	1.2%	5.7%	11.8%	3.2%	8.0%	4.9%	17.0%	9.0%	0.1%	2.0%	39.8%	6.1%	8.0%
	Cronulla	0.3%	7.2%	1.7%	1.9%	21.7%	3.4%	5.0%	1.0%	0.2%	1.4%	0.6%	8.5%	8.4%
	Caringbah South	0.2%	6.4%	7.6%	7.5%	4.0%	6.7%	3.4%	4.3%	0.2%	3.5%	0.5%	9.1%	5.6%
	Lilli Pilli	0.0%	0.7%	0.1%	3.3%	0.1%	9.9%	0.0%	8.7%	0.0%	7.0%	0.0%	0.2%	1.4%
	Bundeena	26.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.3%	0.0%	0.0%	0.1%	1.2%
	Woolooware	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.6%	0.2%
	Miranda	12.2%	13.9%	16.2%	12.6%	15.4%	7.6%	17.4%	12.0%	10.6%	12.1%	17.0%	17.3%	14.5%
	Sylvania	7.6%	3.0%	4.0%	2.9%	3.6%	1.8%	6.5%	2.0%	7.1%	2.4%	17.9%	4.9%	4.2%
	GyMEA	0.2%	0.2%	0.2%	0.3%	0.1%	0.3%	0.1%	0.0%	0.1%	0.1%	0.1%	0.0%	0.2%
	Kareela	0.5%	0.1%	0.2%	0.1%	0.2%	0.0%	0.1%	0.0%	1.8%	0.0%	0.6%	1.0%	0.3%
	Jannali	0.0%	0.0%	0.1%	0.0%	0.0%	0.3%	0.2%	0.0%	0.2%	0.0%	0.1%	0.1%	0.0%
	Sutherland	12.0%	0.6%	0.5%	0.3%	0.5%	0.5%	0.4%	0.1%	16.4%	0.7%	0.3%	0.3%	1.1%
	Engadine	14.9%	0.5%	1.0%	0.7%	0.5%	1.1%	0.4%	0.2%	16.4%	0.2%	1.6%	1.6%	1.5%
	Heathcote	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Yarrawarrah	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	2.7%	0.3%	0.8%	0.4%	0.8%	0.1%	0.3%	1.4%	1.0%	1.7%	0.4%	0.8%	0.8%
	Illawong	0.0%	0.0%	0.0%	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%
	Bangor	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out of Sutherland LGA	14.9%	11.0%	10.7%	8.9%	14.5%	7.4%	19.5%	9.0%	27.3%	10.1%	11.6%	8.6%	11.9%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Miranda / Sylvania residents escape expenditure by suburb

% of supermarket spend		Miranda / Sylvania Residents								
Zone of expenditure		Grays Point	Gymea	Gymea Bay	Kangaroo Point	Miranda	Sylvania	Sylvania Waters	Yowie Bay	Miranda / Sylvania Residents
	Caringbah / Cronulla									
	Caringbah	13.7%	11.5%	18.3%	0.5%	10.8%	2.3%	4.5%	30.6%	12.0%
	Taren Point	0.9%	2.5%	2.9%	1.6%	8.5%	5.9%	14.9%	3.3%	5.6%
	Cronulla	0.5%	0.7%	0.6%	0.2%	0.5%	0.4%	0.2%	1.2%	0.6%
	Caringbah South	1.1%	1.2%	0.8%	0.5%	1.1%	0.2%	0.3%	1.9%	0.9%
	Lilli Pilli	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Bundeena	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
	Woolooware	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Miranda / Sylvania									
	Miranda	33.6%	48.6%	41.8%	9.0%	55.3%	13.8%	17.9%	39.2%	38.1%
	Sylvania	9.1%	11.0%	9.2%	71.9%	9.0%	58.2%	43.3%	8.6%	21.8%
	Gymea	10.9%	10.7%	9.1%	0.0%	0.7%	0.3%	0.0%	1.7%	4.1%
	Sutherland / Kirrawee									
	Kareela	0.9%	0.7%	0.4%	0.9%	0.5%	1.3%	0.8%	0.2%	0.7%
	Jannali	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.1%
	Sutherland	7.7%	1.3%	2.9%	0.1%	0.5%	0.3%	0.3%	1.3%	1.5%
	Engadine									
	Engadine	4.2%	1.7%	1.3%	0.1%	0.5%	0.6%	0.4%	0.6%	1.1%
	Heathcote	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Yarrawarra	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
	Menai									
	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	4.6%	1.0%	1.2%	0.3%	0.8%	0.7%	0.3%	1.0%	1.2%
	Illawong	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
	Bangor	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out of Sutherland LGA	12.6%	8.9%	11.2%	14.8%	11.4%	15.8%	17.1%	10.1%	12.3%
	TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Sutherland / Kirrawee residents escape expenditure by suburb

% of supermarket spend		 Sutherland / Kirrawee Residents								
 Zone of expenditure		Bonnet Bay	Como	Jannali	Kareela	Kirrawee	Oyster Bay	Sutherland	Sutherland / Kirrawee Residents	
	Caringbah / Cronulla	Caringbah	1.3%	3.4%	3.1%	3.5%	9.9%	1.5%	3.8%	4.5%
		Taren Point	0.4%	0.6%	0.7%	1.1%	1.9%	1.8%	0.9%	1.2%
		Cronulla	0.9%	0.6%	0.2%	0.5%	0.6%	0.4%	0.4%	0.5%
		Caringbah South	0.1%	0.2%	0.6%	0.2%	1.0%	0.2%	0.3%	0.5%
		Lilli Pilli	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Bundeena	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Woolooware	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Miranda / Sylvania	Miranda	12.5%	9.4%	10.3%	12.2%	34.6%	12.4%	17.6%	18.1%
		Sylvania	6.6%	9.8%	9.0%	13.5%	11.5%	12.6%	8.6%	10.5%
		Gymea	0.3%	0.2%	0.2%	0.1%	2.8%	0.1%	0.3%	0.8%
	Sutherland / Kirrawee	Kareela	14.8%	32.5%	35.0%	55.3%	13.3%	49.4%	4.1%	26.5%
		Jannali	5.3%	6.6%	11.8%	0.9%	0.3%	3.0%	0.8%	3.3%
		Sutherland	11.8%	9.0%	6.0%	0.7%	8.4%	2.5%	30.0%	11.1%
	Engadine	Engadine	1.5%	1.1%	2.9%	1.1%	2.8%	1.0%	5.1%	2.6%
		Heathcote	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Yarrawarrah	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Menai	31.7%	13.0%	8.4%	2.7%	3.1%	4.8%	11.8%	8.4%
		Illawong	0.3%	0.1%	0.0%	0.1%	0.0%	0.1%	0.2%	0.1%
		Bangor	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out of Sutherland LGA		12.6%	13.2%	11.5%	8.2%	9.8%	10.3%	16.0%	11.7%
	TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

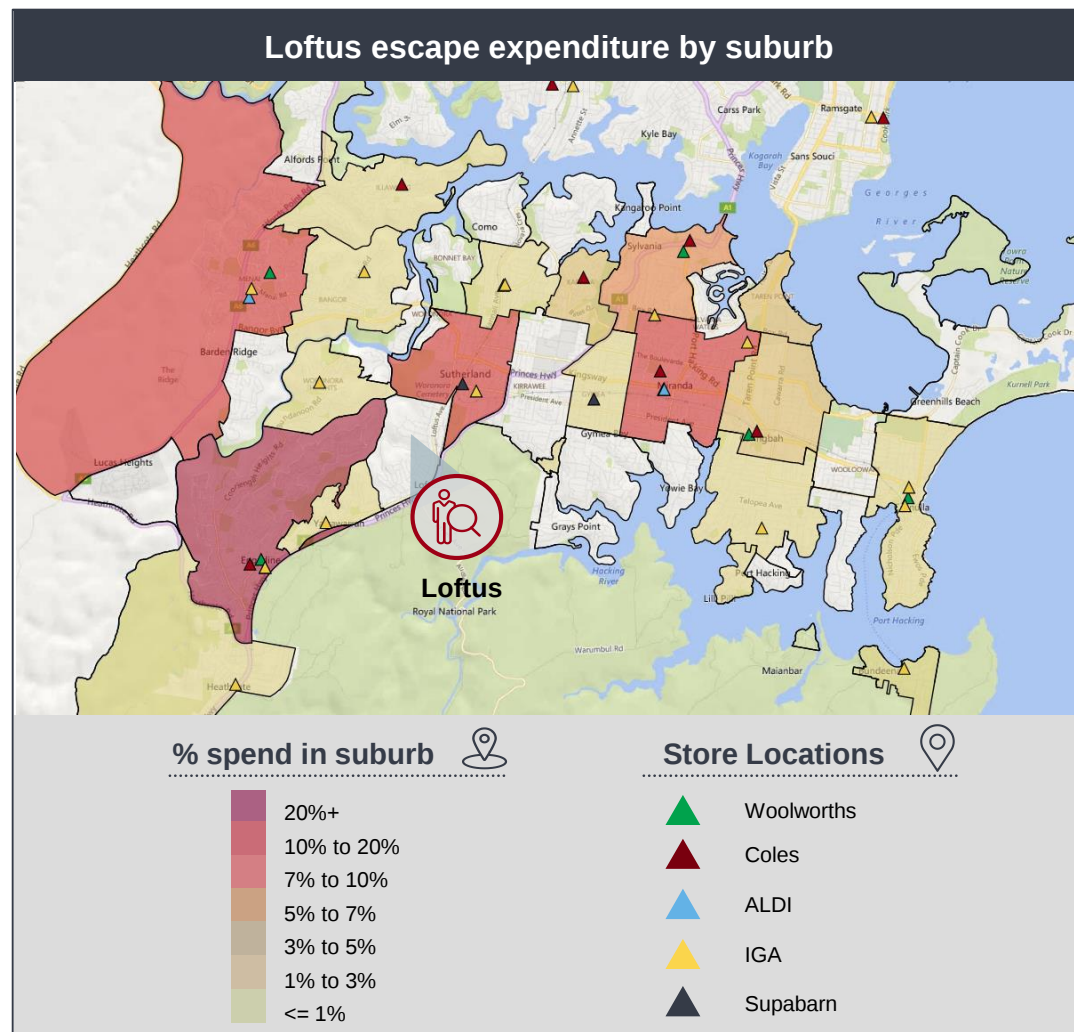
Engadine residents escape expenditure by suburb

% of supermarket spend		Engadine Residents						
Zone of expenditure	Location	Engadine	Heathcote	Loftus	Waterfall	Woronora Heights	Yarrawarrah	Engadine Residents
		0.6%	1.2%	1.9%	0.1%	1.4%	0.9%	1.0%
		0.7%	0.6%	1.8%	0.8%	1.0%	0.5%	0.8%
		0.1%	0.3%	0.2%	0.0%	0.2%	0.1%	0.2%
		0.1%	0.1%	0.3%	0.2%	0.1%	0.0%	0.1%
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		2.4%	2.4%	11.0%	2.2%	2.7%	4.3%	3.6%
		2.0%	1.9%	5.5%	1.1%	3.1%	2.7%	2.6%
		0.1%	0.1%	0.2%	0.1%	0.1%	0.1%	0.1%
		0.4%	0.1%	1.2%	0.0%	0.3%	1.0%	0.5%
		0.1%	0.0%	0.3%	0.0%	0.6%	0.0%	0.2%
		0.8%	1.0%	13.6%	0.3%	0.8%	3.0%	2.5%
		82.0%	69.8%	41.4%	56.2%	74.1%	69.5%	72.9%
		0.2%	8.5%	0.1%	10.1%	0.2%	0.1%	1.6%
		0.3%	0.1%	0.6%	0.0%	0.1%	3.9%	0.6%
		0.1%	0.0%	0.0%	0.1%	2.8%	0.0%	0.3%
		1.5%	3.6%	10.1%	1.2%	1.3%	2.9%	2.9%
		0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
		0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%
		8.5%	10.2%	11.5%	27.6%	11.2%	10.6%	9.9%
		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Menai residents escape expenditure by suburb

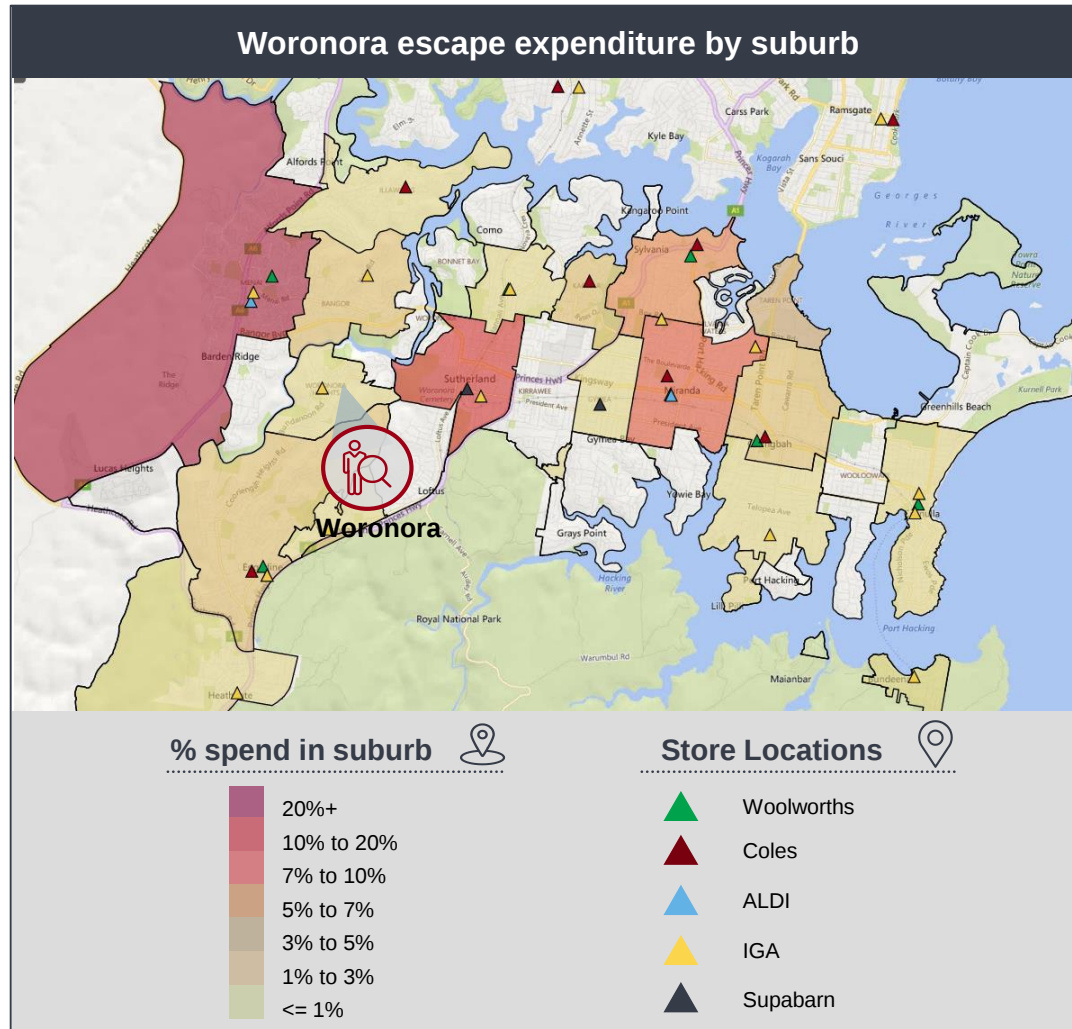
% of supermarket spend		Menai residents							
Zone of expenditure		Alfords Point	Bangor	Barden Ridge	Illawong	Menai	Woronora	Menai Residents	
	Caringbah / Cronulla	Caringbah	0.1%	1.2%	0.6%	0.4%	0.4%	2.3%	0.7%
	Taren Point	0.0%	0.3%	1.1%	0.2%	0.2%	3.3%	0.6%	
	Cronulla	0.1%	0.2%	0.1%	0.1%	0.3%	0.6%	0.2%	
	Caringbah South	0.0%	0.1%	0.0%	0.0%	0.1%	0.2%	0.1%	
	Lilli Pilli	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Bundeena	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Woolooware	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Miranda / Sylvania	Miranda	2.1%	5.0%	4.3%	2.3%	3.0%	8.4%	3.7%
	Sylvania	0.3%	2.4%	1.1%	0.5%	1.5%	5.1%	1.5%	
	Gymea	0.0%	0.1%	0.1%	0.0%	0.1%	0.3%	0.1%	
	Sutherland / Kirrawee	Kareela	0.1%	0.2%	0.3%	0.1%	0.3%	2.0%	0.3%
	Jannali	0.1%	0.1%	0.1%	0.0%	0.2%	0.6%	0.2%	
	Sutherland	0.1%	1.9%	0.8%	0.4%	0.7%	14.6%	1.8%	
	Engadine	Engadine	0.2%	0.6%	2.1%	0.1%	0.6%	1.1%	0.7%
	Heathcote	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	
	Yarrawarrah	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
	Menai	Woronora Heights	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Menai	46.9%	67.1%	72.1%	34.5%	74.5%	49.9%	58.5%	
	Illawong	27.6%	2.4%	2.0%	39.6%	4.5%	0.3%	14.6%	
	Bangor	0.1%	4.2%	0.4%	0.1%	0.8%	1.0%	1.1%	
Out of Sutherland LGA		22.3%	14.0%	14.6%	21.6%	12.8%	10.0%	16.2%	
TOTAL		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Engadine – Loftus deep-dive



		Resident Suburb		
Zone of expenditure			Loftus	
	Caringbah / Cronulla	Caringbah		2%
		Taren Point		2%
		Cronulla		0%
		Caringbah South		0%
		Lilli Pilli		0%
		Bundeena		0%
		Woolooware		0%
	Miranda / Sylvania	Miranda		11%
		Sylvania		6%
		Gymea		0%
	Sutherland / Kirrawee	Kareela		1%
		Jannali		0%
		Sutherland		14%
	Engadine	Engadine		41%
		Heathcote		0%
		Yarrawarrah		1%
	Menai	Woronora Heights		0%
		Menai		10%
Illawong			0%	
Bangor			0%	
Out of Sutherland LGA			12%	
TOTAL			100%	

Menai – Woronora deep-dive



		Resident Suburb
		Woronora
Caringbah / Cronulla	Caringbah	2%
	Taren Point	3%
	Cronulla	1%
	Caringbah South	0%
	Lilli Pilli	0%
	Bundeena	0%
	Woolooware	0%
	Miranda	8%
	Sylvania	5%
	Gymea	0%
Sutherland / Kirrawee	Kareela	2%
	Jannali	1%
	Sutherland	15%
Engadine	Engadine	1%
	Heathcote	0%
	Yarrawarrah	0%
Menai	Woronora Heights	0%
	Menai	50%
	Illawong	0%
	Bangor	1%
Out of Sutherland LGA		10%
TOTAL		100%

Appendix: Quantum Majors Tracker definition

Factor	Quantum Majors Tracker
Competitor set	Woolworths, Coles, Metcash (IGA & Foodworks), Aldi, Aussie Farmers Direct, Costco* and Harris Farm
Includes liquor	✗
Includes convenience store spend attached to petrol stations	✗
Includes online	✓
Includes business spend	✗
Includes subsidiaries	✓
Includes spend by Australians at competitors internationally	✗
Includes international cardholder spend in Australia	✗
Includes cash transactions	✗

Source(s): Quantum

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