11 February 2025

2220670

Nick Steele
Corporate Property
Fabcot Pty Ltd
1 Woolworths Way
Bella Vista, NSW, 2153

Via email: nsteele1@woolworths.com.au

Dear Nick,

Letter in response to Economic Impact Assessment & Peer Review – Planning proposal application for Woolworths Ramsgate (PP2024/0001).

Background

In December 2023 this office prepared an Economic Impact Assessment (EIA) for the proposed mixed use development (comprising apartments and a supermarket) at 187-199 Rocky Point Road, Ramsgate. The EIA adopted the latest available data available at the time of preparation and had regard to industry best-practice approaches in economic impact assessment and retail modelling.

The assessment highlighted the substantial level of current escaped expenditure from the Ramsgate main trade area, and the under provision of supermarket facilities. The provision of a new major full-line supermarket at Ramsgate (as proposed), would provide an essential supermarket offer close to residents' homes, and help reduce the need for residents to travel greater distances across this part of Sydney.

While the effect of new entrants (competition) on individual businesses is not a relevant planning consideration, the key planning consideration is the ability of centres to continue to serve the needs of their local community, and to ensure that a new project does not fundamentally undermine the role or viability of existing and planned centres.

The Ethos Urban EIA concluded that any impact from the proposed development will be limited, with the proposal not likely to impact on the ongoing operation or viability of any existing or proposed centre. All centres, and the region overall, stand to benefit from increased market growth as well as the range of economic and community benefits likely to be supported by the proposal. The Ethos Urban EIA identifies the strong market demand for the proposal and outlined that any impacts will be short-term only (estimated at 1-2 years), with all existing and proposed stores to benefit from ongoing market growth estimated at $4.6m per annum.

Since the time of the original report, a revised scheme has been developed that results in a slightly smaller development outcome, including 141 apartments (compared to 144) and a supermarket of 3,996m² (compared to 4,011m²). As a result, any impacts would also be slightly lower, while supported benefits remain.

Response to Peer Review

Don Fox Planning (DFP) Planning Consultants prepared an Economic Impact Assessment for Supabarn Supermarkets Pty Ltd in December 2024. This EIA included a peer review of the December 2023 Ethos Urban EIA.

This letter has been prepared in response to the peer review which queries the approach and findings in the Ethos Urban 2023 EIA.

As outlined on page 39 of the DFP Planning Consultants EIA, the peer review summary notes several queries with regard to the Ethos Urban EIA. The accompanying table outlines both a summary of the key queries raised by DFP (left column), with the Ethos Urban response (right column).

DFP Peer Review Statements	Ethos Urban Comments in Reply
The inclusion of a secondary trade area is unreasonable for a development within a local centre.	It is common practice in the retail industry to consider primary and secondary trade areas. *This practice is recognised in research, policies and findings at all levels of Government including the NSW Land & Environment Court.* Customers shop at a range of stores and centres, rather than at one store in isolation, depending on their needs, travel patterns and personal preferences. *This cross-shopping nature has been highlighted as recently as the August 2024 ACCC Supermarkets inquiry, where the ACCC consumer survey outlined that nearly 86% of respondents indicated they visit either 2 or more stores in a typical week.* Typically a full-line supermarket in metropolitan locations would attract business from residents within 2-3km of the site. *This benchmark has been established by the industry through engagement with retailers and highlighted in publicly available definitions of full-line supermarket trade areas and is supported by submissions and findings presented by Government bodies including the ACCC.* The population in the defined secondary sector is not currently provided with any supermarket offer and these residents are generally located within 2-3km from the subject site. As such, these residents would have a choice of location for their supermarket needs, which would include the proposed store. Further, the Ethos Urban EIA assumes only a small proportion (<15%) of secondary sector resident supermarket expenditure is directed to the proposal. Previous analysis undertaken by Urbis in October 2021 for a full-line supermarket at the Subject Site also identified a potential retail trade area that extended north to President Avenue, Kogarah. **The inclusion of a secondary sector in the Ethos Urban EIA is considered appropriate and aligned to industry standards for retail assessments.**
The population projections are much higher than those estimated in this EIA. It is considered that, for the purposes of assessing impact a conservative approach should be adopted.	Key queries raised appear to relate to the inclusion of a secondary sector - as noted above, the inclusion of the secondary sector is deemed appropriate. Excluding the secondary sector, the population difference observed between the two EIAs is limited (less than 4% variation), and with an assumed annual population growth ranging between a rate of 0.8%pa or 1.0%pa in each assessment. As a result, this difference is considered minimal with limited impact on overall estimates or conclusions. **Population projections used in the Ethos Urban EIA are considered appropriate.**
The estimates of available expenditure are also much higher than those included in this EIA, potentially as a result of the over estimated population projections.	Retail expenditure estimates used in the Ethos Urban EIA are based on industry standards for retail assessments (including use of MarketInfo, a micro-simulation model which uses a variety of data sources including ABS Household Expenditure Survey, ABS Census of Population and Housing data, ABS Australian National Accounts, and other relevant sources).* Furthermore, this approach includes a retail growth assumption that considers both population growth <u>and</u> real growth in retail spend (assuming constant dollars). *The approach to retail expenditure estimates adopted in the Ethos Urban EIA is consistent with those recognised in research, policies and findings at all*

	levels of Government including the ABS and Productivity Commission as well as industry bodies such as the Shopping Centre Council of Australia. The DFP EIA adopts a simplified retail expenditure estimate (using the 2015/16 ABS Household Expenditure Survey as a base only) and outlines an assumption of 0.75%p.a. It is unclear if the retail expenditure estimates account for real growth and/or population growth assumptions. It would appear based on the commentary provided in the DFP EIA that growth in real spend per capita has not been considered. In any case, the DFP EIA understates an appropriate average annual growth rate and one not aligned with industry standards for retail modelling. **Retail expenditure estimates used in the Ethos Urban EIA are considered appropriate and align to industry standards for retail assessments.** *It should be noted that while MarketInfo is recognised as an industry standard, increasingly the industry is now shifting towards use of credit card transaction data to inform expenditure estimates.*
The supermarket turnover estimates are unrealistically low. This, combined with the over estimation of available expenditure has resulted in the impacts on existing supermarkets being grossly under estimated.	The Ethos Urban EIA includes a considered retail expenditure and sales model that aligns with industry best practice and standards for retail impact assessments – this includes consideration for retail expenditure, supermarket provision and sales for stores, both within and beyond the trade area, and allows for changes in supply and market conditions over time. *The approach to retail modelling and impact assessment adopted in the Ethos Urban EIA is consistent with those recognised in retail strategies, policies, decisions and findings by various levels of government, including State Government planning courts such as the NSW Land & Environment Court.* The approach and method used in the DFP EIA does not align with recognised methods, or modelling common to retail impact assessments. As such, this appears to have resulted in the misinterpretation of the findings and approach used in the Ethos Urban EIA. Supermarket turnover estimates and impacts used in the Ethos Urban EIA are considered realistic and appropriate based on the assessment approach adopted at the time of preparation. Of relevance, the robust nature of the Ethos Urban EIA, and accuracy of estimates used, is highlighted in the sales estimates derived for Supabarn at Sans Souci, which show alignment between those estimated in the Ethos Urban EIA and those presented in the DFP EIA which was prepared on behalf of Supabarn Supermarkets Pty Ltd. **Estimates of sales and impacts presented in the Ethos Urban EIA are considered appropriate and align to industry standards for economic and retail impact assessments.**

In summary, the Ethos Urban EIA identifies the strong market demand for the proposal and outlines that any impacts will be short-term only (estimated at 1-2 years), with all existing and proposed stores to benefit from ongoing market growth estimated at $4.6m per annum. The revised scheme, proposing a slightly smaller offer, would also result in slightly lower impacts, although this is considered to be minimal.

A review of the DFP EIA suggest that the unorthodox nature of the assessment may have resulted in the misinterpretation of the analysis and findings presented in the Ethos Urban EIA. This includes the implication that the Ethos Urban EIA figures have been overstated, or that the analysis is incomplete by not accounting for an assessment of supermarkets beyond the defined main trade area. *The Ethos Urban EIA details all key supermarkets within 5km (by road) of the Subject Site and also has regard to nearby major centres – refer page 27 and 38 of the Ethos Urban EIA for a list and impacts associated with centres both within and beyond the defined main trade area.*

It is clear that the Ethos Urban EIA adopts a robust approach and methodology that has been refined over our decades of experience in the industry, including engagements by national retailers, councils, State Government and as independent expert witnesses. Our assessment has regard to accepted industry standards and best-practice modelling techniques (refer **Appendix**).

Of relevance to any stakeholder or decision making authority is the approach to retail modelling and impact assessment adopted in the DFP EIA that appears to disregard accepted industry practices, with key examples including:

- Simplified approach to modelling that excludes key components such as an allowance for real growth per capita, or an increase in market share and retained supermarket expenditure following expansion and development of new stores or facilities.
- Unreasonable assumptions used to summarise impacts, including ignoring commonly accepted competition factors such as new Woolworths or Coles stores impacting on their own existing network and each other rather than on select stores only. It appears that the DFP EIA presents an unlikely impact scenario on the basis that all possible sales from the proposed store would fall on Independent supermarkets only as outlined in the following statement:
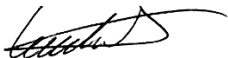
> *"Assuming the Coles at Ramsgate Beach and the Ramsgate Woolworths do not experience any reduction in turnover, the Ramsgate IGA and Sans Souci Supabarn supermarkets will be the stores most impacted if the Planning Proposal proceeds...Based on this scenario, it is estimated that the impacts on these supermarkets could be in the order of 55% reduction in turnover which is clearly unsustainable."*
>
> *page vi – DFP Planning Consultants – Economic Impact Assessment, prepared for Supabarn Supermarkets Pty Ltd. December 2024.*

As a result, conclusions or findings outlined in the DFP EIA appear inconsistent with industry standards and best-practice retail modelling, and as such, we reiterate the findings of the Ethos Urban EIA which demonstrates strong retail market need for the proposal, limited, short term impacts only, and an overall net economic and community benefit likely to result from the proposal in the longer term.

I trust that this meets your requirements.

Yours sincerely,

Lee Cikuts
Director, Economics
lcikuts@ethosurban.com
0422 042 652

Appendix

Retail standards used and referenced in this letter, and the Ethos Urban EIA, are based on our extensive experience in the retail industry, proprietary databases, client engagements and are derived, or have regard to, a range of commonly accepted practices and sources including (but not limited to):

Standard	Source
Retail Provision & Modelling	*Property Council of Australia Shopping Centre Database*
	Shopping Centre Council of Australia
	NSW Government
	Productivity Commission
	ACCC
	Location IQ Provision Benchmarks
	Urbis Shopping Centre Benchmarks
	National retailer operation and publications
	Real Estate Investment Trusts
	Publications by consultants including Urbis, Location IQ, Hill PDA, MacroPlan, Deep End and SGS
Retail Expenditure, Sales & Impact Assessment	*MarketInfo micro-simulation spending model <u>or</u> CommBank IQ (or similar) transaction modelling.*
	Property Council of Australia Shopping Centre Database
	Shopping Centre News 'Guns' Publications
	Urbis Shopping Centre Benchmarks
	Productivity Commission
	State Government Planning Departments
	State Government Land and Environment Court Decisions
	Australian High Court Decisions

Economic Impact Assessment

193 and 197-199 Rocky Point Road, 66-68 Ramsgate Road, and 2-4 Targo Road, Ramsgate

Submitted to Georges River Council
On behalf of Fabcot Pty Ltd

Ethos Urban

'Gura Bulga'
Liz Belene Cameron

'Gura Bulga' – translates to Warm Green Country. Representing New South Wales.

'Dagura Buumarri'
Liz Belanjee Cameron

'Dagura Buumarri' – translates to Cold Brown Country. Representing Victoria.

'Gadalung Djarri'
Liz Belanjee Cameron

'Gadalung Djarri' – translates to Hot Red Country. Representing Queensland.

Ethos Urban acknowledges the Traditional Custodians of Country throughout Australia and recognises their continuing connection to land, waters and culture.

We pay our respects to their Elders past, present and emerging.

In supporting the Uluru Statement from the Heart, we walk with Aboriginal and Torres Strait Islander people in a movement of the Australian people for a better future.

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Ethos Urban

Planning Proposal

193 and 197-199 Rocky Point Road, 66-68 Ramsgate Road, and 2-4 Targo Road, Ramsgate

Woolworths 🍏

RAMSGATE

Artist impression

4,011m² full-line supermarket

144 dwellings (1–3 bedrooms)

New service "Direct to boot"

New retail anchor & parking for Ramsgate precinct

Need for residential dwellings

+14,000

new dwellings required in Georges River LGA by 2036

+3,220

additional residents forecast in the Trade Area by 2036

Need for retail and supermarket floorspace

+$137M

additional retail expenditure across the Trade Area by 2036

+14,000m²

retail floorspace requirement to serve this growth

−42%

less supermarket floorspace in the Trade Area compared to the average national provision

3km

No major full-line supermarket provided within 3km of Ramsgate site*

58%

($70M) of local resident supermarket expenditure is estimated to be directed to larger supermarkets outside of the local area

*Defined as stores of 3,200m² or larger

Ethos Urban

Benefits from the proposal

130 FTE direct jobs supported for every $100 million spent during construction

$13.2 million
Contributing $13.2 million in direct value added to the economy annually upon completion

130
Supporting 130 local employment opportunities upon on completion

The project is aligned to government strategy

- ✓ Support housing supply and diversity
- ✓ Best in class sustainability outcomes
- ✓ Improving walkability and reduced car dependency
- ✓ Responding to evolving retail trends of modern consumers in the local region
- ✓ Supporting vibrancy and activity both day and night
- ✓ Supporting 30-minute communities

Limited impact on the surrounding retail network. Surrounding retailers and businesses will stand to **benefit from long term growth in the market**

Establishment of an **anchor tenant and retail car park**, strengthening the flow-on benefits and exposure to all retail businesses

ROCKY POINT ROAD

RAMSGATE ROAD

Increased access and activation of Rocky Point Road

Support a **modern retail offer** that is aligned to evolving local resident needs – "Direct to Boot" pick-up service

Providing housing supply and diversity - through **144 apartments** across 1-3 bedroom typologies

43%
Delivery of a major full-line store that is **43% larger than any existing supermarket** offer in the Trade Area

Retained supermarket expenditure locally – **improving amenity and reducing traffic congestion**

Woolworths

RAMSGATE

Artist impression

Ethos Urban

1.0   Introduction

1.1   Purpose of Report

This Economic Impact Assessment has been prepared on behalf of Fabcot Pty Ltd and submitted to Georges River Council in support of the Planning Proposal at 193 and 197-199 Rocky Point Road, 66-68 Ramsgate Road and 2-4 Targo Road, Ramsgate. This land is known as the Subject Site.

The purpose of this report is to assess the economic impact of the Planning Proposal on the local and surrounding community. The Planning Proposal aims to amend the Georges River Council Local Environmental Plan 2021 (GRLEP 2021) to facilitate a mixed-use redevelopment on the Subject Site, comprising a full-line supermarket as well as residential dwellings.

1.2   Report Structure

This report contains the following sections:

- **Section 1** – Introduction
- **Section 2** – Subject Site Context and Planning Proposal
- **Section 3** – Strategic Policy Context
- **Section 4** – Trade Area Analysis
- **Section 5** – Competitive Context
- **Section 6** – Market Assessment
- **Section 7** – Economic Impact Assessment

1.3   Methodology

This economic impact assessment has been developed with consideration to socio-economic assessment practices. The approach and methodology adopted reflects industry best practice for economic impact assessments including use of accepted modelling techniques and the latest available data.

Key steps in undertaking the economic assessment have included: analysis of the existing locality and the community, including its economic profile; identification and assessment of potential impacts (both direct and indirect) as a result of the planning proposal.

The baseline profile for current residents and the economy within the defined Trade Area was developed using published data sources, including the Australian Bureau of Statistics (ABS), with this data supplemented by additional information where available.

Economic impacts were then evaluated in terms of direct impacts and indirect impacts. In the case of both direct and indirect effects, the key metric for the analysis is an estimate of jobs and economic output.

1.4   Sources and Assumptions

The following sources have been referenced in this document:

- ABS Census of Population and Housing 2021
- ABS Estimated Resident Population, 2022
- Transport for NSW Population Projections, 2022
- Marketinfo
- Shopping Centre News publications
- PCA Shopping Centres Online
- Near ping data
- Georges River Commercial Centres Strategy

The following assumptions have been used in this document:

- Key findings of background studies, industry data and technical reports relied upon are accurate.
- Socio-economic data for the Trade Area accurately reflects the community demographic profile.
- ABS estimated resident population figures provides an accurate estimate of historic population.
- Transport for NSW population projections data provide an accurate outlook for future population growth.
- Marketinfo data provides an accurate estimate of retail expenditure.
- Cordell Connect provides an accurate representation of the development pipeline.
- Construction phase economic benefits are indicative only, and provides an indication of employment and benefits generated per $100 million of construction costs.

2.0 Subject Site Context and Planning Proposal

This section provides a review of the Subject Site, the regional and local context and Subject Site attributes as they relate to the planning proposal.

Key findings of relevance to the Subject Site context include:

- Located at 193 and 197-199 Rocky Point Road, 66-68 Ramsgate Road, and 2-4 Targo Road, Ramsgate.
- High profile site with three frontages including strong exposure along Rocky Point Road within the existing retail strip.
- Existing uses including ground floor retail tenancies and 17 residential properties.
- Development surrounding the Subject Site is typically characterised by retail and residential uses. This includes an emerging mix of medium to high density shop-top housing and apartment complexes, including to the north and east of the Subject Site.
- Rocky Point Road, Ramsgate receives significant passing vehicular traffic travelling north and south, including the Sutherland Shire to the south.
- Beyond the immediate surrounding area, Ramsgate is located within proximity to major centres such as Hurstville, Kogarah, and Rockdale, which are each large, strategically positioned centres within the Georges River LGA.
- The Planning Proposal responds appropriately to the existing context of Ramsgate and the surrounding region, by providing housing that is of an appropriate scale and essential retail services that is not currently provided for in the area.

2.1 Subject Site Context

The Subject Site is located at 193 and 197-199 Rocky Point Road, 66-68 Ramsgate Road, and 2-4 Targo Road, Ramsgate. The Subject Site is on the eastern edge of Georges River Local Government Area (LGA), with areas east of Rocky Point Road located within Bayside LGA. Parts of the Subject Site (including 66 Ramsgate Road and 4 Targo Road) are located across the suburb boundary in Beverley Park.

The Subject Site comprises a total of 14 individual lots, and has an area of over 6,000m^2. It has a prominent location, comprising three street frontages including 85m along Targo Road, 60m along Rocky Point Road, and 30m to Ramsgate Road.

A number of existing properties and businesses comprise the current Subject Site. These are predominately located along Rocky Point Road and include occupied ground floor retail tenancies with rear, at-grade car parking, shop-top housing, three separate detached residential dwellings, and a vacant site. In total, the Subject Site currently supports 17 residential properties.

An aerial image of the Subject Site is illustrated in **Figure 1** and a summary of relevant attributes is provided below.

Address and Location	• 193 and 197-199 Rocky Point Road, 66-68 Ramsgate Road, and 2-4 Targo Road, Ramsgate
Zoning	• R4 – High Density Residential (66-68 Ramsgate Road and 2-4 Targo Road) and E1 – Local Centre (193-199 Rocky Point Road).
Existing Uses	• Ground floor retail tenancies, 17 residential dwellings, car park, vacant land
Ownership	• Fabcot Pty Ltd, Georges River Council
Subject Site Attributes	• High profile site with three frontages, including 60m along Rocky Point Road.

Site Boundaries

Figure 1   *Subject Site Aerial*

Source: Nearmap/Ethos Urban

2.2   Locational Context

Ramsgate is located 16km south of the Sydney Central Business District (CBD) and 5km south-west of Sydney Airport. It is situated between Botany Bay (1.1km to the east of the Subject Site) and Kogarah Bay (400m to the southwest of the Subject Site), near Georges River. Ramsgate is surrounded by the suburbs of Beverley Park, Monterey, Ramsgate Beach, Kogarah, Dolls Point and San Souci.

Rocky Point Road is the primary thoroughfare through the suburb, connecting the Princes Highway to the north across the Captain Cook Bridge through to the Sutherland Shire to the south. The Georges River Local Strategic Planning Statement highlights that Rocky Point Road supports around 26,000 people travelling from Taren Point (Sutherland Shire) each day, and accordingly is a major thoroughfare for this part of Sydney.

Generally, development surrounding the Subject Site is characterised by retail and mixed-use development to the north/south along Rocky Point Road, with residential areas further to the east and west. More specifically, the development context surrounding the Subject Site is further described below:

North	• To the north along Targo Road is a 6-storey dwelling complex comprising ground floor retail.
East	• Predominately includes retail tenancies located along Rocky Point Road. Some properties include shop-top housing units of up to 4 storeys. Detached residential dwellings are located further to the east.
South	• Immediately to the south are the retail and shop-top housing properties that comprise the remainder of the block at the corner of Rocky Point Road and Ramsgate Road.
West	• Immediately to the west are a number of one-two storey semi-detached and detached residential dwellings which transition to the golf course further west.

Beyond the immediate surrounding area, Ramsgate is located within proximity to major centres such as Hurstville, Kogarah, and Rockdale, which are each larger, strategically positioned centres within the Georges River LGA. The Subject Sites location context is shown in **Figure 2** over the page.
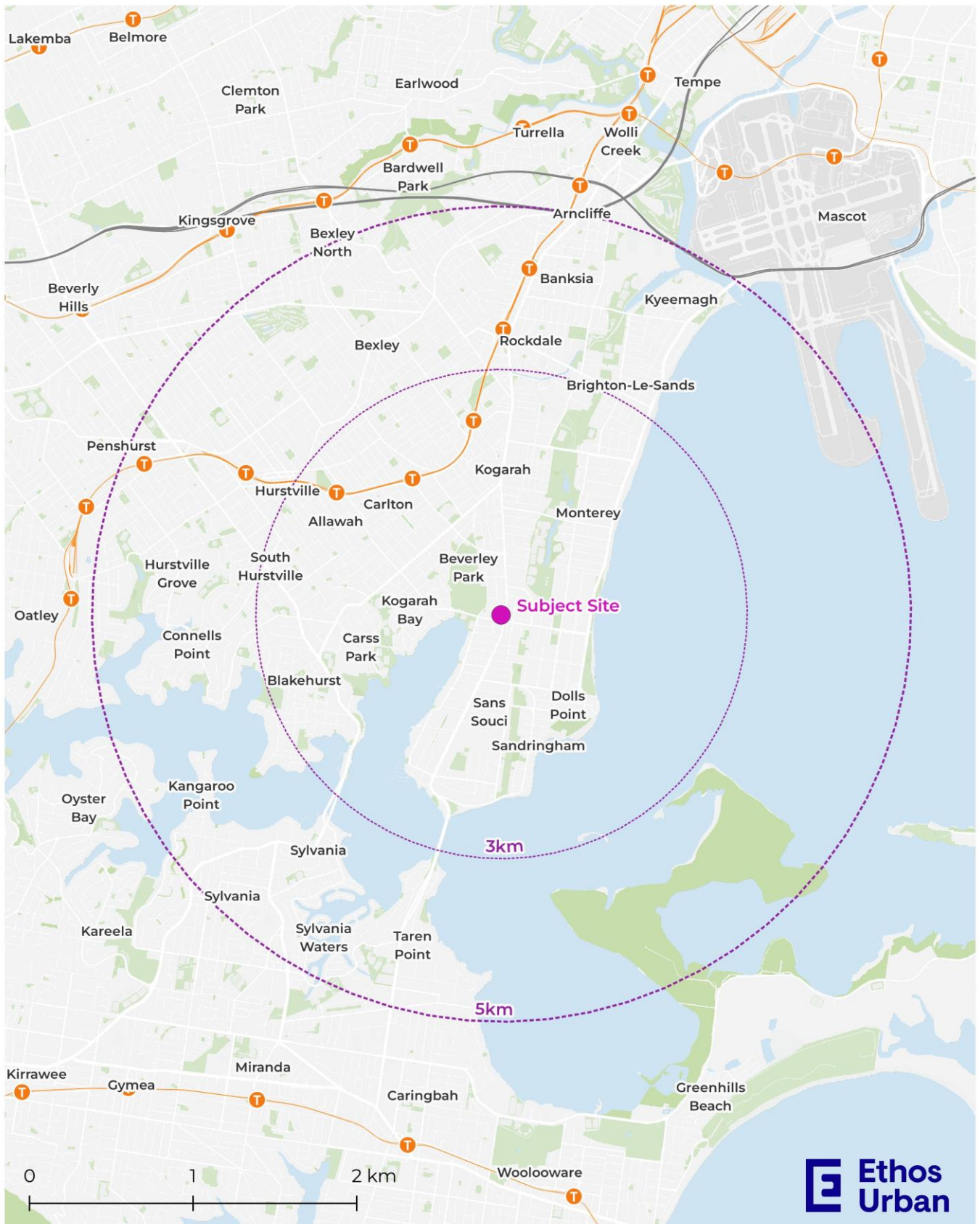
Figure 2   Regional Context Map

Source: Ethos Urban using QGIS

2.3   Planning Proposal

The broad intent of the Planning Proposal is to achieve a vibrant mixed-use redevelopment outcome, including a full-line supermarket, together with supporting retail and well located residential in-fill housing in a suitable urban form. The purpose of the development will serve an identified undersupply of supermarket floorspace in the immediate area, whilst anchoring the intent for Ramsgate as a 'key local centre' in the strategic planning framework.

The Planning Proposal seeks Council's support for a site-specific amendment to the GRLEP 2021 for the following:

* Rezoning of a portion of the site from R4 High Density Residential to E1 Local Centre;
* Increasing the building height standard on the site from part 15 metres and part 21 metres to part 16m and part 29m.
* Increase the maximum floor space ratio (FSR) standard on the Subject Site.
* Introduce a new site-specific provision under Part 6 Additional local provisions of the GRLEP 2021 relating to exceptions to the maximum permitted height at 193 and 197-199 Rocky Point Road and 2-4 Targo Road to allow greater flexibility for future development on the site to provide roof top communal open space.
* Reclassify Council owned Lot 301 DP 1142822 (76.1m^2) from 'community land' to 'operational land' to enable future acquisition by Fabcot Pty Ltd and eventual redevelopment of the land, and insert details for the land into 'Schedule 4 Classification and reclassification of public land'.

Site-specific amendments to the Georges River Development Control Plan 2021 (GRDCP 2021) are also proposed to support the Planning Proposal and the proposed future redevelopment. These amendments will address key design and development outcomes, including bulk, scale and massing, building design, activation, access, landscaping, residential amenity and sustainability.

The indicative reference scheme totals some 16,849m^2 of Gross Floor Area (GFA), comprising 4,011m^2 of supermarket floorspace (inclusive of a 125m^2 liquor store and 152m^2 Direct to Boot facility), and 12,838m^2 of residential floorspace consisting of 144 apartments. A 202 space basement car park is provided that will accommodate the needs for all uses within the proposal. A new publicly accessible through-site link (minimum 6m wide) connecting Targo Road and Ramsgate Road is provided to enhance permeability and connectivity of the site with the broader Ramsgate Centre.

Figure 3   *Photomontage of the proposal – Rocky Point Road perspective*

Source: Clarke Hopkins

Figure 4   Proposed Ground Floor Plans

Source: Clarke Hopkins

3.0 Strategic Policy Context

This section provides an overview and summary of the strategic planning policies of relevance to the Subject Site and Planning Proposal. At a high level there are several policies that have been adopted and released that are of relevance to the economic context of the Subject Site, and the future development as a result of this proposal.

3.1 Key themes and drivers

A summary of key themes and drivers outlined by strategic policy that aligned with the proposed development include:

- **Greater Sydney Region Plan**: supporting the 30 minute city aspiration and enhancing Greater Sydney's liveability, productivity and sustainability. The Greater Sydney Commission aspires for a '30 minute city', where each Sydney resident is able to access employment, open space and essential services within 30 minutes of their home.

- **The Eastern City District Plan**: The District Plan contains the planning priorities and actions for implementing the Greater Sydney Regional Plan at a district level. The purpose of the District Plan is to support council in planning for growth and to align the Local Strategic Planning Statements (LSPS) with place-based outcomes.

   The Eastern City District Plan notes that approximately 1,800,000m² of additional retail floorspace is required over the next 20 years. Specifically, the Plan notes that changes in retail trends, emerging night-time economies and population growth will drive demand for additional and flexible retail facilities in the future.

- **The South District Plan**: The South District Plan outlines that an additional 680,000m² of retail floorspace is required over the next 20 years to support the regions growing population. The Plan highlights that local centres play an important role in providing local employment, and many include supermarkets with floorspace greater than 1,000m². Figure 13 in the Plan shows that there is an absence of local centres generally within Ramsgate and surrounding suburbs that support a supermarket within walking distance to people's homes.

- **Georges River Local Strategic Planning Statement**: The LSPS sets out the land use vision for the LGA over the next 20 years, which includes establishing *a productive place to live, work and enjoy – with diverse, active, green, well designed and connected places*. The LSPS notes that a provision of an additional 14,000 homes and 13,000 jobs will need to be supported by 2036 in achieving this vision. This includes an increase in employment floorspace of +25%, equating to around 180,000m².

   The LSPS identifies Ramsgate as a Local Centre that could be expanded for jobs and/or housing. A key consideration reflected through the LSPS is that any delivery of housing must be coordinated and supported by local infrastructure (such as retail).

   The LSPS highlights that Rocky Point Road supports around 26,000 people travelling from Taren Point each day. Accordingly, the Subject Site has significant exposure to passing traffic and commuters, making it a highly appropriate location for a full-line supermarket.

- **Georges River Local Housing Strategy:** The Housing Strategy highlights that of the 14,000 additional dwellings required by 2036 around 12,000 can be provided through existing planning controls. Accordingly, a further 2,000 dwellings need to be unlocked by 2036.

   The Housing Strategy shows that Ramsgate has the highest proportion of flats/shop-top housing, and the lowest share of separate houses. Accordingly, the delivery of 141 dwellings planned at the Subject Site is consistent with the existing character of the area, and aligns with the Housing Strategy to deliver more diverse housing options outside of major centres that can suit both downsizers and family households. Specifically, the Housing Strategy shows that there is a mis-match between existing dwelling supply and dwelling suitability, with 60% of dwellings in Ramsgate having one spare bedroom. Accordingly, there is a need for more appropriate and smaller dwelling sizes that cater to household needs.

- **Georges River Economic Development Strategy**: Ramsgate (Rocky Point Road) is identified as an emerging economic centre within the Strategy. The Strategy notes Georges River LGA is failing to understand and respond to consumer spending and retail trade trends and changing consumer needs is a key threat challenging the LGA economic capabilities. The Planning Proposal will ensure that modern consumer retailing trends and needs are met in the local area, and is discussed in **Section 6.1.1** of this report. The Planning Proposal will also support additional jobs in the retail trade sector, which is highlighted in the Strategy as a key industry sector for local employment.

- **Georges River Commercial Centres Strategy:** The evidence base provided within the Commercial Centres Strategy shows the following key economic trends of relevance to the Planning Proposal:
   – Mid sized to full line supermarkets are increasingly anchoring smaller centres

- There is continued strong growth in the demand for supermarket grocery stores
- Zoning of additional land for retail must demonstrate genuine demand which cannot be met in existing centres.

Ramsgate (Rocky Point Road) is identified as a Village within the existing centres hierarchy, however is highlighted as having potential to be 'promoted' to a Local Centre after 2025. The Strategy outlines the role of local centres as:

"Provide essential access to day to day goods and services close to where people live with over 5,000m^2 of retail floor space and anchored by at least one supermarket larger than 1,000m^{2}".

Accordingly, the facilitation of a full line supermarket at the Subject Site will enable Ramsgate to evolve into a Local Centre that can appropriately fulfill the needs of residents and workers in the local area.

3.2   Suitability of the Planning Proposal

The Planning Proposal will strongly align with the strategic vision for Georges River LGA and specifically the continued growth of Ramsgate as an emerging centre. The delivery of a full-line supermarket and additional housing supply within Ramsgate will support continued population growth in the region. Importantly, it will help establish Ramsgate as a local centre in the future as intended through strategic plans.

A full-line supermarket at the Subject Site will respond positively to evolving retail trends of modern consumers in the local and surrounding region, and support jobs growth in the retail trade sector. The Subject Site is also in a highly strategic position, and will stand to benefit the local Ramsgate community and economy through enhancing activity, foot traffic to surrounding businesses and ensuring vibrancy in the area both during the day and at night.

4.0 Trade Area Analysis

The following section analyses the local economic context of the Planning Proposal, including defining a Trade Area, assessing the existing demographic characteristics, and forecasting future population levels.

> **Key findings of the Trade Area analysis include the following:**
>
> - A Main Trade Area (MTA) has been defined to reflect the area of influence for the proposed uses which will include a full-line supermarket at the Subject Site. The MTA has been defined to include a Primary Trade Area (PTA), and Secondary Trade Area (STA). The Main Trade Area extends north to President Avenue, east to Botany Bay, south to Sans Souci Peninsula, and west to the Princes Highway at Carlton.
> - A review of the residential demographic profile for the MTA revealed that residents are typically older and living in lower income households. These households tend to be smaller than Greater Sydney and predominately comprise family households. Just over half of all dwellings are defined as low-density residential.
> - The resident population is anticipated to grow, with an additional +3,220 residents anticipated in the MTA by 2036.
> - Total retail expenditure is also projected to increase by +$137.2 million over the period to 2036. Residents within the MTA spend $17,760 on retail items per capita on average, some +1.7% higher than the Greater Sydney average.
> - Across the MTA, the expenditure category with the largest share and highest growth was Food, Liquor and Groceries estimated at $199.7 million in 2023. Expenditure in this group is forecast to increase by +$58.7 million over the period to 2036.
> - The Planning Proposal will align with the local demographic profile and provide local residents with a convenient and accessible supermarket offering within their local area, supporting amenity and anticipated population growth.

4.1 Trade Area Definition

A Trade Area is defined and used as an analytical tool that represents the spatial influence of a centre, or retail destination, and is the region from which a centre is expected to draw consistent and significant levels of patronage. The extent of the Trade Area is defined by a number of factors which include the location of existing and proposed competition, the surrounding physical barriers (such as roads, bridges, railway lines etc.) , and geographical barriers to movement (such as water courses, parkland etc).

For the purposes of the Planning Proposal the Trade Area has been defined with consideration to the coast and waterways, accessibility of the Subject Site via the road network, and its proximity to other existing and proposed supermarkets and retail centres.

The Trade Area has been defined having regard to the likely trading influence of a full-line supermarket proposed at the Subject Site and consideration to the residential population most likely to associate with the proposed residential dwellings. The Trade Area is shown in **Figure 5.**

The Trade Area has been defined to include the following:

- **Primary Trade Area:** The population within the primary sector would have direct access to the proposed Woolworths Ramsgate store and would likely be regular customers.
- **Secondary Trade Area:** defined to include one secondary sector and represents the area that would have good access to the proposed Woolworths Ramsgate store as well as serval other local centres, and would likely utilise facilities at the Subject Site on a semi-regular basis, in conjunction with other retail destinations.

A description of the various sectors is outlined below:

- **Primary:** Encompasses the Subject Site and extends north to Barton Street (Monterey), east to Botany Bay, south to San Souci peninsula, and west to the Princes Highway at Carlton, Kogarah Bay and Carss Park.
- **Secondary:** Encompasses the land north of the Primary Trade Area and is bound by President Avenue (Kogarah) to the north, Botany Bay to the east, Barton Street (Monterey) to the south, and the Princes Highway at Kogarah to the west.

The combination of the Primary Trade Area and the Secondary Trade Area forms the **Main Trade Area (MTA).**
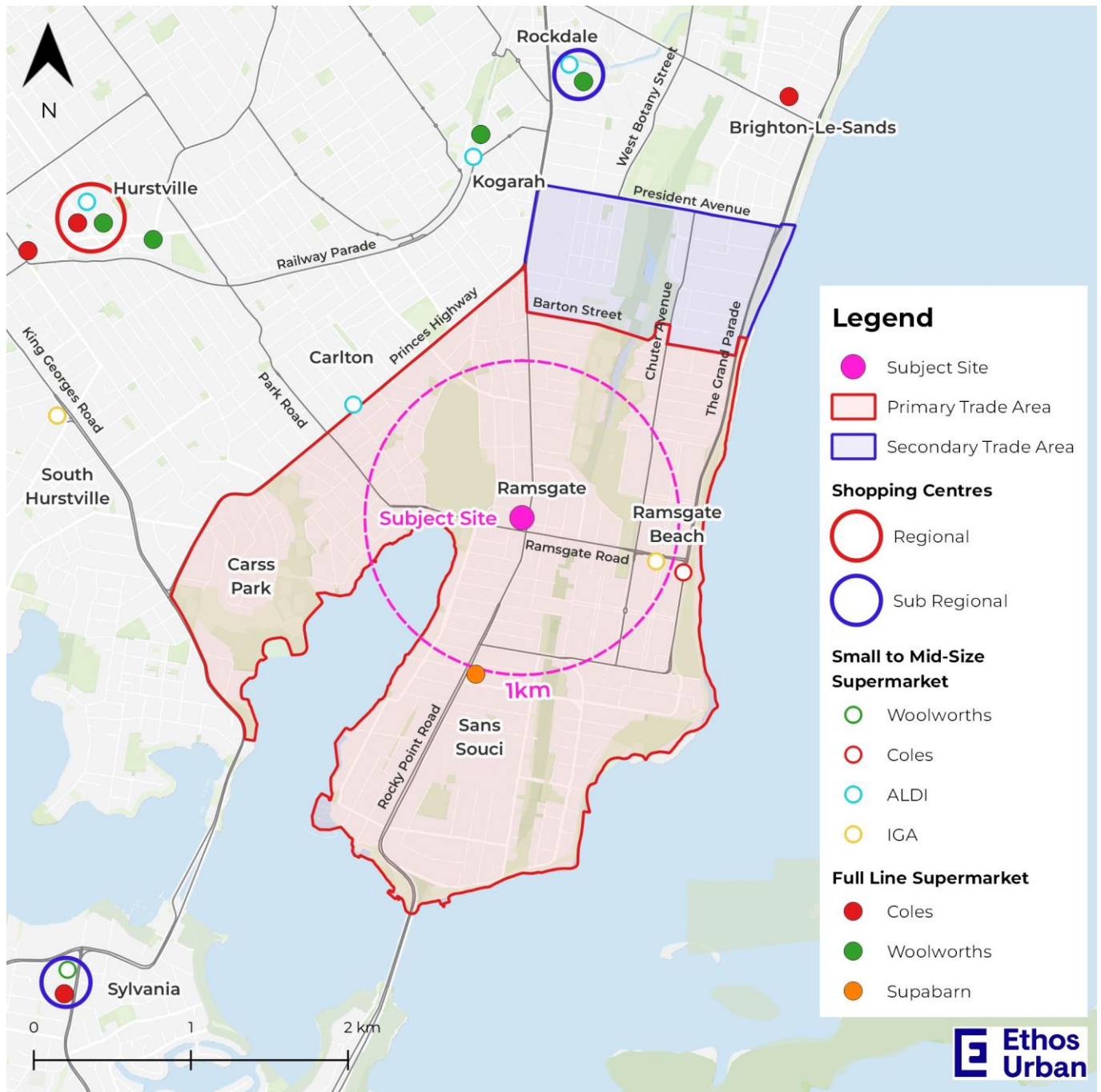
Figure 5 *Trade Area and Supermarket Competition Map*

Source: Ethos Urban using QGIS

4.2   Resident Profile

Demographic data has been sourced from the Australian Bureau of Statistics (ABS) 2021 Census of Population and Housing. The data analysis provides a general overview of the demographic characteristics of residents within the Main Trade Area. For the purposes of this analysis, it is assumed that the 2021 Census provides a current snapshot of the residential demographic profile of the Main Trade Area (see **Table 1**). Key characteristics of the Main Trade Area population include:

Income

Moderate household income: MTA households have a median annual household income of $99,720, some -8.3% lower than the Greater Sydney median of $108,750.

Age Profile

Older Population: The MTA has a median age of 43.4 years, which is substantially higher than the Greater Sydney median of 37.3 years. The largest age cohort include persons aged 35-64, accounting for 40.3% of the resident population. However, the MTA has a prominent share of residents aged 65 years and over at 21.8%, compared to 15.2% across Greater Sydney. This older population would support the need for accessible shops and services close to their homes.

Household Composition

Smaller household sizes: The MTA has a similar household composition to Greater Sydney. This includes 70.5% of dwellings occupied by family households, including 33.5% being couple families with children. Some 27.4% of dwellings are occupied by lone persons. The share of lone person households is above the Greater Sydney benchmark of 23.3%, and correlates with the older population in the MTA.

Dwelling Tenure

High levels of home ownership. Some 39.3 % of MTA dwellings are owned outright, much higher than the Greater Sydney benchmark of 28.3%. The remaining 31.5% of MTA dwellings are owned with a mortgage and 27.8% are rented. The proportion of dwellings rented are significantly lower than that across Greater Sydney.

Dwelling Structure

Majority of dwellings are separate houses. Separate houses account for over half (51.2%) of all MTA dwellings, however this is lower compared to Greater Sydney (56.1%). There is an above average share of semi detached dwellings (20.1%) compared to Greater Sydney (12.8%), and flats, units and apartment represent 28.3% of housing stock.

Housing Costs

Housing is more expensive. The median monthly mortgage repayment in the MTA is +13.0% higher the Greater Sydney median. Housing Stress (defined as households paying more than 30% of their income on housing) is likely prevalent across the MTA, with the median mortgage repayment some 34.1% as a share of median household income. Median weekly rents at $516 are also +7.6% than the Greater Sydney average.

Industry of Employment

High share of population serving industry workers. Health care and social assistance workers (13.6%) and construction workers (10.3%) make up the largest share of employment among MTA residents.

Of relevance to the proposal, some 9.6% of residents work in the retail trade sector, compared to Greater Sydney at 9.3%.

In summary, the Trade Area is characterised by a slightly older population who earn moderate average incomes. There are high rates of dwellings owned outright or with a mortgage, and dwellings are typically occupied by family households both with or without children. These households are living in a mix of dwelling types and are likely to have higher housing costs than other areas of Greater Sydney.

The Planning Proposal would align with the local demographic profile by providing more housing supply to the local area and deliver a full-line supermarket in a highly convenient and accessible location that would provide a range of price points and choice for local residents.

Table 1   *General Community Profile, 2021*

Category	Primary Trade Area	Secondary Trade Area	Main Trade Area	*Greater Sydney*
Income				
Median individual income (annual)	$45,640	$43,820	$45,370	*$45,930*
Variation from Greater Sydney median	*-0.6%*	*-4.6%*	*-1.2%*	*n.a.*
Median household income (annual)	$100,980	$92,440	$99,720	*$108,750*
Variation from Greater Sydney median	*-7.1%*	*-15.0%*	*-8.3%*	*n.a.*
Age Structure				
0-4 years	5.0%	4.8%	5.0%	*6.0%*
5-19 years	16.4%	14.9%	16.2%	*18.1%*
20-34 years	16.5%	17.5%	16.7%	*22.1%*
35-64 years	40.1%	41.6%	40.3%	*38.7%*
65-84 years	18.1%	17.5%	18.0%	*13.2%*
85 years and over	3.8%	3.6%	3.8%	*2.0%*
Median Age (years)	43.5	43.1	43.4	*37.3*
Household Composition				
Couple family with no children	24.9%	24.1%	24.8%	*24.5%*
Couple family with children	<u>34.0%</u>	<u>30.4%</u>	<u>33.5%</u>	<u>*36.1%*</u>
Couple family - Total	58.9%	54.5%	58.2%	*60.5%*
One parent family	11.1%	12.2%	11.3%	*11.0%*
Other families	0.9%	1.1%	0.9%	*1.1%*
Family households - Total	70.9%	67.8%	70.5%	*72.6%*
Lone person household	26.9%	30.3%	27.4%	*23.3%*
Group household	2.2%	1.9%	2.2%	*4.1%*
Dwelling Structure (Occupied Private Dwellings)				
Separate house	52.8%	42.2%	51.2%	*56.1%*
Semi-detached, row or terrace house, townhouse etc.	19.6%	22.6%	20.1%	*12.8%*
Flat, unit or apartment	27.1%	35.2%	28.3%	*30.7%*
Other dwelling	0.5%	0.0%	0.4%	*0.4%*
Occupancy rate	*93.1%*	*93.2%*	*93.1%*	*91.8%*
Average household size	2.6	2.4	2.5	*2.7*
Tenure Type (Occupied Private Dwellings)				
Owned outright	39.8%	36.6%	39.3%	*28.3%*
Owned with a mortgage	31.6%	31.2%	31.5%	*34.0%*
Rented	27.3%	31.0%	27.8%	*36.1%*
Other tenure type	1.4%	1.2%	1.4%	*1.6%*
Housing Costs				
Median monthly mortgage repayment	$2,838	$2,835	$2,837	*$2,510*
Variation from Greater Sydney median	*+13.1%*	*+13.0%*	*+13.0%*	*n.a.*
Median mortgage as a share of median household income	33.7%	36.8%	34.1%	*27.7%*
Median weekly rents	$522	$485	$516	*$480*
Variation from Greater Sydney median	*+8.8%*	*+0.9%*	*+7.6%*	*n.a.*
Median rent as a share of median household income	26.9%	27.3%	26.9%	*23.0%*
Car Ownership per Dwelling				
None	7.5%	8.1%	7.6%	11.2%
One	40.0%	47.6%	41.1%	40.1%
Two	35.6%	31.8%	35.0%	32.8%
Three or more	16.9%	12.5%	16.2%	15.9%

Source: 2021 ABS Census of Population and Housing
Note: interpretation of small area data from the 2021 ABS Census should consider potential outcomes from the COVID-19 pandemic.

4.3   Resident Population Projections

The following sub-section outlines projected residential population growth which helps to inform how the Planning Proposal may serve the local community and surrounding area in the future.

Resident population projections have been prepared using latest official projections from Transport for NSW (TfNSW) and have been rebased to account for the latest ABS historic population estimates. The dwelling pipeline identified in the Cordell Connect database has also been considered to inform future projections. A detailed summary of population projections is presented in **Table 2**, with key findings as follows:

- Historical population growth within the MTA has been moderate with a population increase of +800 in the period between 2016 – 2023, representing average annual growth of +110 residents.
- The 2023 estimated resident population is 31,360. This includes 26,960 residents in the PTA, and 4,400 in the STA.
- The MTA population is forecast to increase by +3,220 residents to a total population of 34,580 by 2036. The growth reflects an average annual increase of +250 residents or a growth rate of 0.8% per annum over the period to 2036.
- Of the total additional +3,220 residents in the MTA, this is anticipated to include +2,930 residents in the PTA, and a smaller provision of +290 residents in the STA.

Overall, across the MTA, future population growth is anticipated to be stronger than historical levels, with the PTA expected to account for most of the growth. This population will require access to, and benefit from, convenient supermarket facilities as well as additional housing supply in the local area.

Table 2   Population Projections

Trade Area	2016	2023	2028	2032	2036	Change (2023-2036)
Population						
Primary Trade Area	26,010	26,960	28,060	28,900	29,890	+2,930
Secondary Trade Area	4,560	4,400	4,570	4,660	4,690	+290
Main Trade Area	**30,560**	**31,360**	**32,630**	**33,560**	**34,580**	**+3,220**
Greater Sydney	5,024,920	5,367,140	5,715,330	5,981,540	6,255,940	+888,800
Average Annual Growth						
Primary Trade Area		+140	+220	+210	+250	+230
Secondary Trade Area		-20	+30	+20	+10	+20
Main Trade Area		**+110**	**+250**	**+230**	**+260**	**+250**
Greater Sydney		+48,890	+69,640	+66,550	+68,600	+68,370
Average Annual Change						
Primary Trade Area		0.5%	0.8%	0.7%	0.8%	0.8%
Secondary Trade Area		-0.5%	0.8%	0.5%	0.2%	0.5%
Main Trade Area		**0.4%**	**0.8%**	**0.7%**	**0.8%**	**0.8%**
Greater Sydney		0.9%	1.3%	1.1%	1.1%	1.2%

Source: Ethos Urban, TfNSW, ABS

4.4   Retail Expenditure Estimates

Estimates of retail spending by residents of the MTA have been prepared with reference to the MarketInfo retail spending model. MarketInfo is a micro-simulation model which uses a variety of data sources including ABS Household Expenditure Survey, ABS Census of Population and Housing data, ABS Australian National Accounts, and other relevant sources. For the purposes of this assessment, retail expenditure has been classified under broad retail categories as follows:

- **Food, Liquor and Groceries (FLG)** – includes spending on fresh food, groceries and take-home liquor. This is the main category relevant to supermarket-based shopping.
- **Food catering** – includes cafes, restaurants and take-away food.
- **Non-Food** – includes apparel, homewares, bulky merchandise and other general merchandise.
- **Services** – includes retail services (e.g. hairdressers, beauty salons etc).

With regard to the proposed development, anchored by a supermarket as the predominately retail tenant, the proposed development will attract spending primarily from the FLG category.

Estimates of the current per capita retail expenditure profile across the Main Trade Area is shown in **Table 3** and highlight that MTA residents spend on average $17,760 per capita on retail items each year (2023 dollars). The MTA per capita retail expenditure level is 1.7% higher than the comparable Greater Sydney average. This higher expenditure is driven by resident spending in the PTA, while the STA has below average spending compared to Greater Sydney retail expenditure.

Table 3   Trade Area Retail Spending Per Capita ($2023)

Trade Area	Food, Liquor and Groceries	Food Catering	Non Food	Services	Total Retail
Per Capita Spending ($2022/23)					
Primary Trade Area	$7,410	$2,550	$7,290	$710	$17,960
Secondary Trade Area	$6,890	$2,540	$6,490	$610	$16,530
Main Trade Area	**$7,340**	**$2,550**	**$7,170**	**$700**	**$17,760**
Greater Sydney	*$7,050*	*$2,630*	*$7,140*	*$650*	*$17,470*
Variation from Greater Sydney average					
Primary Trade Area	5.1%	-3.0%	2.1%	9.2%	2.8%
Secondary Trade Area	-2.3%	-3.4%	-9.1%	-6.2%	-5.4%
Main Trade Area	**4.1%**	**-3.0%**	**0.4%**	**7.7%**	**1.7%**

Source: Ethos Urban, MarketInfo

Total retail spending estimates by residents within the MTA is outlined in **Table 4**. Total retail expenditure is estimated at $556.9 million in 2023, and is projected to increase to $694.2 million by 2036, representing an increase of +$137.2 million over the forecast period. This includes an increase in FLG expenditure of +$58.7 million, from $230 million to $288.8 million over the period to 2036. This increase in retail expenditure will support demand for new supermarket facilities.

There is also a reasonable expectation from residents that these retail needs will be provided and met in accessible and convenient locations close to their homes, rather than necessitate travel beyond their local communities.

As outlined, each of these spending categories is projected to experience substantial growth over the period to 2036, with smaller increases anticipated in the Services and Food Catering categories across the MTA. As such, the addition of retail floorspace at the Subject Site means any impact from the Planning Proposal will be limited and short-term only, with all centres to benefit from future growth in the area.

Table 4   Main Area Total Retail Expenditure, 2023 to 2036 ($2023)

Retail Category	2023	2028	2032	2036	Change (2023-2036)
Primary Trade Area					
FLG	$199.7m	$218.5m	$234.1m	$252.0m	+$52.3m
Food Catering	$68.9m	$73.9m	$77.9m	$82.5m	+$13.7m
Non-Food	$196.4m	$214.9m	$230.3m	$247.9m	+$51.4m
Services	$19.2m	$21.0m	$22.5m	$24.2m	+$5.0m
Total Retail	**$484.2m**	**$528.2m**	**$564.8m**	**$606.6m**	**+$122.4m**
Secondary Trade Area					
FLG	$30.3m	$33.1m	$35.1m	$36.8m	+$6.5m
Food Catering	$11.2m	$12.0m	$12.5m	$12.9m	+$1.7m
Non-Food	$28.5m	$31.2m	$33.1m	$34.6m	+$6.1m
Services	$2.7m	$2.9m	$3.1m	$3.3m	+$0.6m
Total Retail	**$72.7m**	**$79.2m**	**$83.8m**	**$87.6m**	**+$14.8m**
Main Trade Area					
FLG	$230.0m	$251.6m	$269.3m	$288.8m	+$58.7
Food Catering	$80.0m	$85.8m	$90.4m	$95.4m	+$15.4
Non-Food	$225.0m	$246.0m	$263.4m	$282.5m	+$57.5
Services	$21.9m	$23.9m	$25.6m	$27.5m	+$5.6
Total Retail	**$556.9m**	**$607.4m**	**$648.6m**	**$694.2m**	**+$137.2**

Source: Ethos Urban, MarketInfo

5.0   Competitive Context

This section provides an overview of the competitive context for the Subject Site. It includes a review of the existing provision of facilities within the MTA, specifically in relation to predominate uses outlined as part of the Planning Proposal. A detailed analysis of the future competitive context is also provided.

Key findings of the competitive context and implications for the project include:

- A full-line supermarket is generally considered a store of at least 2,500m^2 in size. These stores stock the full range of grocery products sold in the supermarket retail format. A 'major' full-line supermarket is a full-line store of 3,200m^2 or larger which has the scale to meet all customer expectations in terms of product range, presentation, product display, shopper circulation etc. The major full-line supermarket store format is generally the preferred supermarket model by operators and customers.

- Supermarkets between 500m^2 to 2,500m^2 are considered 'limited range' and are small to mid-size stores. These smaller supermarket formats lack the range and scale of products offered by full-line, and in particular major full-line stores, and are best suited to top-up and convenience shopping visits. The Woolworths 'Metro' store model is an example of this smaller limited range supermarket model.

- Across the MTA, three (3) supermarkets are provided, with each store located for than 500m from the Subject Site. A total of 5,800m^2 of supermarket floorspace is supported across these three stores, while total retail floorspace supported within major centres and retail strips within the MTA totals around 27,700m^2.

- Importantly, only one full-line supermarket is currently provided, namely Supabarn at San Souci estimated at 2,800m^2, some 1.2km south of the Subject Site. The remaining supermarkets include a 2,200m^2 Coles and 800m^2 IGA at Ramsgate Beach around 1km east of the Subject Site.

- There are no major full-line stores within the MTA or within 3km of the Subject Site. The nearest major full-line supermarkets are located at Rockdale and Hurstville.

- The provision of supermarket floorspace across the MTA represents around 185m^2 of supermarket floorspace per 1,000 persons. This is around 30% below the typical supermarket provision provided across Greater Sydney of 260m^2 per 1,000 persons, and 42% below the Australian average of 320m^2 per 1,000 persons.

- Currently, just one full-line supermarket serves the MTA resident population of 31,360 residents. Across the retail environment, the typical provision of full-line supermarkets is one full-line store for every 8,000-10,000 residents. This would imply that at least three (3) full-line stores could be supported in the MTA based on the current population.

- The existing Coles at Ramsgate Beach is proposed to be redeveloped as part of a larger mixed-use development. This includes an expansion of the Coles supermarket to 2,583m^2, representing an increase in supermarket floorspace of +383m^2.

- A number of large retail centres including regional and sub-regional shopping centres operate beyond the defined MTA, including at Hurstville and Rockdale. Each of these centres include one or more major full-line supermarkets as well as an extensive non-food retail offer and are visited regularly by MTA residents. Other centres which include major full-line supermarkets include Brighton Le Sands, just beyond the northern boundary of the MTA.

- An analysis of supermarket customer visitation data shows that major full-line stores in these surrounding larger retail centres are attracting customers from the MTA. Notably, these major full-line stores such as Woolworths Rockdale are attracting a significant portion of customers from the MTA, where over 20% of customers to this full-line store estimated to come from MTA residents. ,Accordingly due to the limited provision of full-major full-line supermarket floorspace within the MTA, local Ramsgate and MTA residents are regularly travelling well beyond the local area in order to satisfy their supermarket shopping needs at major full-line stores- resulting in increased traffic congestion and higher levels of escaped expenditure from the MTA reducing local resident amenity.

- A substantial opportunity for an additional full-line supermarket exists within the MTA and more broadly within this part of Sydney, which will help to support amenity, ensure walkability and convenient access to a broad range of essential food and grocery products which support a contemporary lifestyle.

5.1 Major Retail Centres

There are a number of large retail centres including regional and sub-regional shopping centres that operate beyond the defined MTA. Each of these centres includes one or more full-line supermarkets, and as such, are likely to attract a proportion of MTA supermarket expenditure. The centres of most relevance include:

- **Hurstville**: A major centre supporting around 100,000m^2 of shopfront floorspace with the key centre being Westfield Hurstville; a regional shopping centre with 56,080m^2 of retail GLA, anchored by Big W, Kmart, Woolworths, Coles, and ALDI. Other centres include Hurstville Central with 6,300m^2 and East Quarter with 4,240m^2.
- **Rockdale:** Supports an estimated 72,175m^2 of shopfront floorspace, including 22,175m^2 in Rockdale Plaza, which is a sub-regional centre anchored by BIG W, Woolworths, and ALDI.
- **Southgate Sylvania**: A sub-regional centre supporting 22,930m^2 of retail GLA and anchored by Kmart, Coles and Woolworths. This centre is currently planned for expansion.

5.2 Existing Supermarkets

Across the retail industry supermarkets are typically defined as food and grocery stores of 500m^2 or larger. Stores between 500m^2 to 2,500m^2 are generally considered metro supermarkets. A full-line supermarket is often considered 2,500m^2 or larger, and major full-line supermarkets considered to be 3,200m^2 or larger. Small food and grocery stores of less than 500m^2 lack the range and scale of facilities to accommodate a comprehensive grocery shopping trip, although can support a basic convenience shopping trip to meet immediate needs. Grocery stores of this scale are often referred to as convenience stores or foodstores.

While metro supermarkets serve a key role in the retail hierarchy by serving the top-up and immediate needs of the surrounding population, it is only the full-line supermarkets that provide the complete supermarket offer and convenient experience, including providing a comprehensive range of products that deliver choice and price competition for customers. As such, full-line supermarkets, and in particular major full-line supermarkets represent a critical component within a holistic retail network as these stores are regularly sought out by customers as part of fulfilling their ongoing convenience based food and grocery needs.

Woolworths have recently categorised key attributes of full-line supermarkets and Woolworths Metro stores including:

- Full-line – Large format stores offering a full range of products (more than 20,000 SKUs), focused on servicing a large or broad weekly shop.
- Metro – Convenience format stores (smaller than full-line with main trading area size varied based on local need) primarily located in CBDs and commuter hubs servicing high density areas or small local neighbourhoods. Focused on a convenience based and top-up shopping needs (generally less than 15,000 SKUs).

Source: Woolworths

Within the MTA, stores across the retail network can be generally classified as metro or full-line supermarkets.

A review of the existing supermarket environment within the MTA indicates that one full-line and two metro supermarkets currently serve this part of Sydney, with more full-line and major full-line supermarkets located more than 3km away at the larger retail centres beyond the MTA.

A summary of the existing supermarket provision is shown in **Table 5** and represented in the previous **Figure 5**. Key points to note in relation to the supermarket context within the MTA include:

- Total supermarket floorspace within the MTA is estimated at 5,800m^2. This includes a full-line Supabarn at Sans Souci of 2,800m^2 (including liquor), a Coles and IGA at Ramsgate Beach of 2,200m^2 and 800m^2, respectively.
- Based on the 2023 population of 31,360 in the MTA, the provision of supermarket floorspace within the MTA equates to 185m^2 per 1,000 persons, which is around 30% below the typical supermarket provision provided across Greater Sydney of around 260m^2 per 1,000 persons, and 42% below the Australian average of 320m^2 per 1,000 persons.
- Currently, just one full-line supermarket serves the whole MTA population of 31,360 residents. Across the retail environment, the typical provision of full-line supermarkets is one full-line store for every 8,000-10,000 residents. This would imply that at least three (3) full-line stores could be supported in the MTA based on the current population.

- With the exception of one full-line supermarket (Supabarn) within Sans Souci Central, the MTA has no other full-line supermarkets meaning that residents regularly travel to larger supermarkets beyond the MTA to major full-line supermarkets in order to satisfy larger food and grocery shopping trips given access to broader range of products, including a greater selection of brands and price points.

A number of supermarkets of competitive significance exist beyond the Main Trade Area and include:

- **Hurstville:** Hurstville has multiple supermarket offerings, with Westfield Hurstville containing a major full-line Woolworths ($5,130m^2$), a major full-line Coles ($3,400m^2$) and ALDI ($1,480m^2$), around 4.1km north west of the Subject Site. A full-line Coles of $2,730m^2$ is located in Hurstville Central, and a major full-line Woolworths of $3,590m^2$ is located at East Quarter.
- **Rockdale:** Around 3.4km from the Subject Site includes a major full-line Woolworths ($4,080m^2$) and ALDI ($1,410m^2$), which are both located at Rockdale Plaza.
- **Kogarah:** Provided within the Kogarah Town Centre, around 2.8km north of the Subject Site, is a full-line Woolworths supermarket of $2,830m^2$ as well as an ALDI of $1,470m^2$.
- **Carlton:** A $1.500m^2$ ALDI supermarket is located along the Princes Highway in Carlton, around 2km west of the Subject Site.
- **Brighton Le Sands:** A major full-line Coles supermarket of $3,200m^2$ is supported around 4.3km north of the Subject Site.
- **South Hurstville**: A $1,870m^2$ SUPA IGA is provided at South Hurstville, 4.8km west of the Subject Site
- **Sylvania:** Southgate Sylvania is located 7.2km south of the Subject Site and supports a $2,400m^2$ Woolworths supermarket as well as a major full-line Coles of $3,240m^2$.

A summary of existing supermarkets and key retail centres within the region is shown in **Table 5** on the following page, with **Figure 5** outlining the location of these stores.

Table 5   Major Retail and Supermarket Competition (existing)

Location	Shopfront GLA (m²)*	Non-Food Anchor	Supermarket Anchor	Supermarket Classification	Dist. from Subject Site(km)**
Within Main Trade Area					
Ramsgate	**10,000**				
Ramsgate Beach	**6,700**				**1.0**
• Ramsgate Beach Plaza	2,000		IGA (800)	Metro	
• Remainder	4,700		Coles (2,200)	Metro	
Sans Souci	**11,000**				**1.2**
• San Souci Central	4,000		Supabarn (2,800)	Full-line	
• Remainder (Rocky Point Rd)	7,000				
Beyond Main Trade Area					
Carlton	**1,800**		ALDI (1,500)	Metro	**2.0**
Kogarah	**26,960**				**2.8**
• Kogarah Town Centre	5,960	Woolworths,	Woolworths (2,830), ALDI (1,470)	Full Line Metro	
• Remainder	21,000				
Rockdale	**72,175**				**3.4**
• Rockdale Plaza	22,175	Big W (6,500)	Woolworths (4,080) ALDI (1,410)	Major Full-Line Metro	
• Remainder	50,000				
Hurstville	**100,000**				**4.0**
• Westfield Hurstville SC	56,080	Big W (7,400) Kmart (6,200)	Woolworths (5,130) Coles (3,400) ALDI (1,480)	Major Full-Line Major Full-Line Metro	
• Hurstville Central	6,300		Coles (2,730)	Full-Line	
• East Quarter	4,240		Woolworths (3,590)	Major Full-Line	
• Remainder	33,380				
Brighton Le Sands	**13,000**		Coles (3,200)	Major-Full Line	**4.3**
South Hurstville	**4,370**		SUPA IGA (1,870)	Metro	**4.8**
Southgate Sylvania	**22,930**	Kmart (8,140)	Coles (3,240) Woolworths (2,400)	Major Full Line Metro	**7.2**

Source: Ethos Urban, Shopping Centres Online

*Includes all retail shopfronts

**Distance by road (rounded)

5.3   Proposed Supermarkets

A summary of proposed supermarkets underway or planned within the Ramsgate MTA are now outlined. Key projects include the repositioning of the existing Coles Ramsgate Beach supermarket located 1km east of the Subject Site. The development proposes the construction of a 7 storey mixed-use development to comprise a 121 room hotel, 527m^2 of speciality retail and redevelopment of the existing Coles supermarket to a total GFA of 2,583m^2. This represents a net increase in supermarket floorspace of +383m^2 from the current 2,200m^2 Coles located on the site. The project is being assessed by Bayside Council and has not yet had formal planning approval. For the purposes of this assessment the expanded Coles is assumed to be trading by FY28.

Beyond the MTA the most relevant proposed supermarket development includes the expansion of Southgate Sylvania, including the relocation and expansion of the existing Woolworths as part of the expansion. The relocated store will support a Woolworths of 3,501m^2 and represents a net increase of +1,101m^2 from the store's existing size. The plans propose a further net gain to floorspace of around 300m^2. The current Woolworths box is planned to be backfilled with two mini-major stores. For the purpose of this assessment, this expansion is assumed to be complete by FY28.

5.4   Supermarket Customer Visitation

A high level review of supermarket customer visitation can be observed through the use of mobile location data, such as that sourced from Near. Near sources, combines and filters mobile location information from a variety of sources (such as mobile applications) into a single data file that can be used to determine customer patterns and movements for a specified location. While the data represents a 'sample' of customers only, this real world data is useful in complementing traditional retail analysis. In this instance, we have reviewed mobile location data for customers who visited Woolworths Kogarah, Coles Ramsgate Beach, Woolworths Rockdale and Coles Brighton-Le-Sands over the period from November 2022 to November 2023, in order to understand the typical distance customers travelled by customers to existing supermarkets within the MTA as well as full-line supermarkets in the wider region.. Results of the data is mapped in **Appendix A,** and summarised in **Table 6**.

A summary of the results suggest the following implications for resident supermarket shopping behaviours:

- An analysis of supermarket customer visitation data shows that <u>major full-line stores in surrounding larger retail centres are attracting customers from the MTA</u>. Notably, these major full-line stores such as Woolworths Rockdale are attracting a significant portion of customers from the MTA, where over 20% of customers to this full-line store estimated to come from MTA residents. Accordingly due to the limited provision of full-major full-line supermarket floorspace within the MTA, local Ramsgate and MTA residents are regularly travelling well beyond the local area in order to satisfy their supermarket shopping needs at major full-line stores - resulting in increased traffic congestion and higher levels of escaped expenditure from the MTA reducing local resident amenity.

- Smaller supermarkets serve a smaller trade area, while major full-line supermarkets attract business from a broader area. The major full-line supermarket of Woolworths Rockdale attracts customers from a much broader region than the smaller Coles at Ramsgate Beach, which is approximately half the size of Woolworths Rockdale. Coles Ramsgate Beach generally attracts the majority of business from residents within 3km of the store (including MTA residents), while for the major full-line stores, a higher proportion of visits are recorded for residents who live up to 5km away.

- Residents of the MTA shop at multiple supermarkets, with these residents regularly travelling to shop at major full-line supermarkets such as Woolworths Rockdale as well as at their more local stores such as Coles Ramsgate Beach. This is evidenced by the overlapping nature of the customer visitation patterns across multiple supermarkets. Furthermore, it is demonstrated through a comparison between Woolworths Kogarah, a full-line supermarket which is closer to the MTA population yet receives less visitation from MTA residents than a major full-line store such as Woolworths Rockdale, located further north, indicating that consumers will regularly use multiple stores and travel further in order to access more convenient and major full-line supermarkets which include a more extensive product range and food and grocery offer.

Table 6   Customer visitation data to surrounding supermarkets

Suburbs included in MTA*	Coles Ramsgate Beach	Woolworths Rockdale	Woolworths Kogarah	Coles Brighton-Le-Sands
	Metro	*Major Full-Line*	*Full-Line*	*Major Full-Line*
Carss Park	0.6%	0.2%	0.3%	0.2%
Kogarah Bay	3.0%	0.7%	0.8%	0.2%
Beverly Park	4.1%	1.3%	1.2%	0.2%
Sans Souci	18.7%	2.8%	1.7%	0.9%
Sandringham	1.1%	0.3%	0.1%	0.1%
Dolls Point	2.0%	0.3%	0.1%	0.2%
Ramsgate	**5.7%**	**0.5%**	**0.4%**	**0.2%**
Ramsgate Beach	4.4%	0.9%	0.2%	0.2%
Kogarah	4.4%	9.1%	10.3%	3.1%
Monterey	8.5%	5.2%	1.0%	2.4%
Residual customers from outside the MTA	47.3%	78.7%	84.0%	92.3%
Percentage (%) of MTA residents shopping at supermarket	**52.7%**	**21.3%**	**16.0%**	**7.7%**

Source: Near data, Ethos Urban

Note*: Includes suburbs that are included within and extend beyond the MTA boundary

6.0   Market Assessment

This section provides an assessment of the types of uses outlined as part of the proposed development. It considers the demand and supply for these uses, and the implications for the Planning Proposal, to assist with evaluating any potential impacts.

The market assessment shows that there is sufficient demand to support the uses planned as part of the proposed development. Key findings include:

- A review of retail expenditure projections outline that the MTA population will increase expenditure by +$137.2 million over the period to 2036, including +$58.7 million in FLG (food, liquor and grocery) expenditure. This substantial increase is based on anticipated growth only between 2023 and 2036, both across all retail categories but also across FLG expenditure which is of most relevance to supermarkets. The significant increase highlights the need to provide additional supermarket and retail floorspace to support this growth and continue to provide residents with high levels of convenience and amenity.

- Major full-line supermarkets (of 3,200m^2 or larger) provide the most comprehensive range of convenience based food and grocery items with over 20,000 stock units typically provided in a full-line store. As such, they are a critical component in the retail hierarchy and network.

- Typically one full-line supermarket is provided for every 8,000-10,000 residents in metropolitan locations. The current MTA population of 31,360 would therefore support at least three (3) full-line supermarkets. Only one is currently provided, with no major full-line supermarket provided within 3.4km of the Subject Site.

- The supermarket provision in the MTA is estimated at only 185m^2 per 1,000 persons, this is 30% less than the typical provision found in metropolitan Sydney of 260m^2 per 1,000 persons. With an older, family orientated population that would require access to supermarkets, it is clear that there is a substantial under provision of supermarket floorspace.

- Larger supermarkets in metropolitan areas would typically serve residents within 2-3km of the store. Currently no major full-line stores are provided less than 3km from the Subject Site.

- The large existing population of more than 30,000 residents, combined with limited existing provision of supermarket floorspace, emphasise the strong opportunity for the proposed development in Ramsgate. The proposed development is planned to deliver a new offer to the local community, in the form of a contemporary major full-line supermarket that will cater to modern customer requirements, including 'direct to boot' services. This offer will align strongly with the requirements of the Ramsgate community.

- There is an anticipated undersupply of up to 850 dwellings by 2036 in the MTA. In this context, the additional 141 dwellings proposed as part of the Planning Proposal would help support a proportion of this required growth.

- The proposed 141 dwellings at the Subject Site would support the need for and improve housing supply, choice and diversity in the local area, in line with strategic plans and policies for increasing housing supply across Georges River LGA.

6.1   Retail Demand

6.1.1   Evolving Physical Environments and Modern Tenant Requirements

Changing Consumer Trends

Today's fast paced lifestyle and flexible work-life arrangements mean that modern consumers have diverse preferences when it comes to supermarket shopping. Consumers increasing prefer supermarkets that enable or promote:

- **24/7 shopping -** Consumers want the ability to be able to shop at times that are suitable and convenient for them. Working conditions and lifestyles have changed – many consumers want to be able to shop early morning, during the day and late at night outside of traditional shopping hours.

- **Walkability and accessibility** - Consumers, particularly those living in dense urban environments, prefer to shop locally at facilities that are easily accessible walking or by private car or public transport.

- **Range of products** - Consumers seek a broad range of products, at various levels of price and quality from a range of sources that can cater to a variety of tastes, cultural and ethnic preferences.

- **Shopping as an experience** – Retail stores including supermarkets are increasingly responding to consumer demand for a greater retail experience through an increased range of products, foreign brands and high-quality foods including ready-made meals. Supermarkets are also looking to differentiate themselves by providing better experiences and offers that can attract consumers in highly competitive retail markets.
- **Shopping - online delivery** - Consumers have continued to embrace online shopping for both supermarket and retail goods, with delivery of grocery items direct to peoples' homes growing in popularity. While still a relatively small share of supermarket sales, online shopping continues to increase.
- **Shopping - contactless pick-up** – Contactless online services have also increased. This is seen in trends such as 'direct to boot' drive through, where a consumer can order online and pick up at the store or expect delivery of goods within a short time after the order has been placed.

To meet these customer trends, 'best in class' supermarkets demonstrate features such as "direct to boot" - instore pick up shopping; express delivery; technology driven product sales and storage; and are innovative and forward looking.

'Best in class' supermarkets promote sustainable design and encourage sustainable practices - new supermarkets have higher levels of energy efficiency, and lower levels of wastage including reduced packaging and plastics.

Many new supermarkets also include a number of sustainability and recycling initiatives aimed at assisting households in becoming more sustainable, providing households with instore recycling and wastage programs (e.g. composter, food wastage programs). Where possible, the fit-out should be built with recycled materials and sustainable products and cater for developments in clean technologies, for example include electric car charging points on site.

Supermarkets can encourage walkability and active modes of transport by providing improved convenience, limiting the need for shoppers to take multiple trips to satisfy their shopping needs. This is particularly important in areas of high residential density and assists in reducing carbon footprint by enabling residents to shop within their local area and reduce the distance required to travel to other major full-line stores beyond the local area.

6.1.2   The Importance of Full-line Supermarkets

Full-line supermarkets are critical for providing households with a wider range of products and services. These types of stores provide the largest range of convenience-based food and grocery items, with over 20,000 stock units typically available.

Fresh food is a key offer of full-line supermarkets, including a full range of baked goods, seafood, meat, deli sections and cheeses in a single location. The range of products allow for greater consumer choice in terms of quality, type and price. These facts make full-line supermarkets a critical component of the retail hierarchy Australia-wide.

In contrast, the compact metro stores offered by Woolworths are effective at serving a community's basic immediate needs. They do not substitute the need for a full-line supermarket given their limited stock. While metro supermarkets provide a mix of products including canned goods, perishables, fruit and vegetables, and ready-to-go meals, they have a much narrower selection of products and far less flexibility for price point variation. As a result, metro store customers often also regularly seek out a full-line supermarket in order to access a greater selection of brands, price-points, private labels and specialty products.

The emergence of online supermarket shopping, including delivery and direct to boot services, has also increased in recent years. Over time the proportion of online sales is likely to increase as a share of retail expenditure in line with current retail trends; online retail sales are estimated to account for around $55.4 billion, or around 12.8% of total retail trade (NAB Online Retail Sales Index – October 2023).

Online supermarket shopping has expanded the range of services and options available to customers, and now represents an additional component and method of shopping for contemporary consumers. However, online shopping will continue to form only one part of the supermarket shopping experience for a wide range of the population.

While online is growing, it remains one part of a holistic retail network that exists alongside physical stores. Smaller limited-range stores serve local role in the retail hierarchy, however full-line supermarkets are also required in order to cater for a larger household shop. As such, for Woolworths a mixture of physical stores, including both Metro and full-line stores, are required in order to provide a complete retail network, with a provision of Metro stores only, unable to cater to the full supermarket shopping needs of local residents.

Customers will visit full-line supermarkets for their larger weekly or fortnightly shop in order to purchase products not available at smaller metro stores (i.e. customers would frequent both store types). Full-line supermarkets are also utilised by all age groups and demographics.

In considering the concept of community need for supermarkets, it is relevant to note:

- Approximately 75% of fresh food and groceries purchased Australia-wide are from supermarkets;
- No other retail format is visited more often by a higher share of the population than supermarkets;
- Supermarkets are fundamental to supporting basic household and lifestyle needs for the overwhelming majority of the Australian population.

As a result, the relative accessibility of the community to major supermarket shopping facilities is a fundamental consideration for economic and community need.

An under-provision of full-line supermarkets undermines the provision of the full range of day-to-day grocery items to households in that region in an accessible and convenient manner. Escape expenditure will occur as residents have to travel greater distances to their nearest or preferred full-line supermarket, placing a strain on local traffic networks and adding to work/life balance pressures. In addition, households can potentially be impacted by a shortfall in full-line supermarkets arising from the lack of range and price competition.

6.1.3   Supermarket Potential at Subject Site

The indicative development concept for the Subject Site includes the provision of a 4,011m^2 major full-line supermarket (including a liquor component).

A review of retail expenditure projections outline that the MTA population will increase expenditure by +$137.2 million over the period to 2036, including +$58.7 million in FLG (food, liquor and grocery) expenditure. This substantial increase is based on anticipated growth only between 2023 and 2036, both across all retail categories but also across FLG expenditure which is of most relevance to supermarkets. The significant increase highlights the need to provide additional supermarket and retail floorspace to support this growth and continue to provide residents with high levels of convenience and amenity.

As outlined in **Section 5.2**, one full-line supermarket is typically supportable for every 8,000-10,000 residents across Australia. The current MTA population of 31,360 would therefore support at least three (3) full-line supermarkets. Only one is currently provided (Supabarn of 2,800m^2 at Sans Souci), with no major full-line supermarket provided within 3.4km of the Subject Site. Furthermore, the population is anticipated to increase further to 34,580 by 2036.

The supermarket provision in the MTA is estimated at only 185m^2 per 1,000 persons, this is 30% less than the typical provision found in metropolitan Sydney of 260m^2 per 1,000 persons. With an older, family orientated population that would require access to supermarkets, it is clear that there is a substantial under provision of supermarket floorspace.

Larger supermarkets in metropolitan areas would typically serve residents within 2-3km of the store. Currently no major full-line stores are provided less than 3km from the Subject Site.

As no major full-line supermarkets are currently provided, MTA residents rely heavily on stores located outside of the Ramsgate and MTA, including at major full-line stores more than 3km away including at Rockdale and Hurstville. This is supported by a review of mobile location data which indicates that based on a sample of customers at major full-line stores, over 20% of customers to Woolworths Rockdale reside in suburbs within the defined Ramsgate MTA.

The implications of these shopping patterns is that a high level of supermarket expenditure is currently escaping from the Ramsgate MTA, resulting in increased traffic congestion, and amenity impacts for local residents due to increased congestion and a lack of range and price competition.

The large existing population of more than 30,000 residents, combined with limited existing provision of supermarket floorspace, emphasise the strong opportunity for the proposed development in Ramsgate. The proposed development is planned to deliver a new offer to the local community, in the form of a contemporary major full-line supermarket that will cater to modern customer requirements, including 'direct to boot' services. This offer will align strongly with the requirements of the Ramsgate community.

Taking into account the limited existing and proposed provision of supermarket floorspace in the MTA, substantial opportunity for additional full-line supermarket facilities exists within the MTA and more broadly within this part of Sydney. The proposed major full-line supermarket of 4,011m^2 (including liquor) at the Subject Site will draw residents to the already established Ramsgate town centre on Rocky Point Road. Having a central, highly accessible location, the proposed store will provide a convenient and walkable supermarket offer, enhancing the availability of basic grocery products for many residents in the local area. These essential components of a vibrant and successful retail network will be important in supporting projected growth in Ramsgate in the years to come.

6.2 Residential Demand

6.2.1 Housing Affordability

Housing affordability in Australia remains a social, economic and political challenge. The ability to provide for increased housing stock and diversity (across a range of sizes and price points) in key centres and locations, will support affordability and result in increased community benefit.

Based on the latest ABS 2021 Census results, some 20.6% of MTA homeowners are living in mortgage stress, while 48.1%% of renter households are living in rental stress. Housing stress is defined as more than 30% of household income spent on mortgage repayments or rental payments.

In the current economic climate, rising inflation and interest rates will add further to pressure on household finances. Reflecting the decline in economic conditions in the past 18 months, it is likely the figures summarised from the 2021 Census considerably understate the housing affordability challenge for households in the MTA.

The ability to provide for increased housing supply and additional dwellings in close proximity to amenities, will help to provide more desirable, diverse and affordable housing options for the local community (including for downsizers).

6.2.2 Market Need for Housing

Population growth in the MTA will drive increased demand for residential development within the local area. The MTA population is forecast to increase by +3,220 residents between 2023 and 2036.

Based on population projections and an assumed average household size, an assessment of the implied dwelling demand required to support the anticipated population growth within the MTA can be derived. This implied demand is then compared to the known future dwelling supply pipeline across the MTA to determine an indicative over or under supply.

The anticipated undersupply is shown in **Table 7** with the following assumptions considered in this analysis:

- The current market is in equilibrium – i.e. the need for dwellings in 2023 is zero
- All residential development projects (regardless of planning and development status) is included in the supply pipeline, with the exception of those classified as "abandoned".
- The average household size of 2.5 persons per household is held constant over the period.
- External shocks are not assumed in this analysis, with the housing market assumed to remain stable over the forecast period, with new supply and demand occurring in a correlated and timely manner.

The results show that even when considering the known future residential supply and conservative assumptions, there is an anticipated undersupply of up to 850 dwellings by 2036. In this context, the additional dwellings proposed as part of the Planning Proposal would help support a proportion of this required growth.

Table 7   Implied Demand for Housing

Implied Dwelling Requirements	2023	2036
Population	31,360	34,580
Average Household Size (held constant)	2.5	2.5
Implied Dwelling Demand (Projected Households)	12,544	13,832
Cumulative Need		+1,288
Known New Housing Stock (assumed to proceed)		+438
Over/Under Supply		**-850 Undersupply**

Source: Ethos Urban

It is a strategic objective of Georges River LGA to deliver more housing in the region, including a requirement for +14,000 new dwellings by 2036. This includes the identification of Ramsgate as a local centre that could support more housing supply in the future.

The Subject Site represents an ideal location to support the proposed 144 dwellings due to factors including:

- Adjacent to retail facilities
- Accessible to bus transport routes along Rocky Point Road
- Adjacent to employment and community services and facilities
- Close to open space and recreational facilities.
- Aligned with the existing character and development patterns with medium to higher density residential development occurring in the local area.
- Is aligned with the demographic profile of the area, including a growing composition of families and downsizers.

Accordingly, the proposed 144 dwellings are well suited to be included as part of the mixed use scheme, and is able to support greater housing diversity and choice in the local area.

6.3   Implications for the Planning Proposal

The Subject Site is well positioned on a high-profile site within an established and growing centre. There is a clear need for additional full-line supermarkets in the MTA to serve the substantial undersupply and support the existing and growing population. The Planning Proposal will ensure households have access to a full range of supermarket products, services and price choice. The proposed store will ensure that the needs of contemporary consumers are being met, including providing online delivery and the contactless pick up through the 'direct to boot' offer. The Planning Proposal will deliver a modern store that is relevant, walkable and highly accessible to local residents.

The proposed 144 dwellings as part of the mixed-use offer will support the need for additional housing supply and diversity in the area, and will align with the needs of the local community. The Planning Proposal aligns with objectives of various levels of government in delivering on the strategic planning objectives for Ramsgate and surrounding regions by supporting housing affordability and diversity in high amenity locations.

7.0   Economic Impact Assessment

7.1   Introduction

This section provides an assessment of the economic impacts (including benefits) likely to occur as a result of the Planning Proposal. Impacts are considered with regard to the local and regional area and through the construction and operational phases of the project. An estimate of the jobs likely to be created during the construction and operation phase of the project are provided.

Key findings of this Economic Impact Assessment include:

- The Planning Proposal addresses a substantial undersupply of full-line supermarket floorspace within the local area. Furthermore, the project will assist in ensuring the retail needs of the growing population within Ramsgate and the local area are met in a convenient and accessible location. As such, the proposed development would help to alleviate pressure on the existing supermarket network, and respond to market demand and customer need.
- The proposal will serve an identified need for additional housing stock in a high profile and convenient location supporting growth in the local area. With the proposal accounting for less than 10% of required future dwellings, the impact from future residential uses will be limited.
- The result from the individual centre and supermarket sales impact assessment indicates that all potential impacts as a result of the proposed Ramsgate development are well within the normal competitive range of less than 10%.
- In addition to the above, the projected annual food and grocery sales growth is estimated at around $4.6 million per annum across the MTA. As such, any potential impact is likely to be in the short term only, with all impacts projected to be absorbed within 1-2 years, reflecting the growth in the market.
- The proposed development will not impact on the ongoing viability or continued operation of any existing or proposed retail centre in the area.
- Overall, the Ramsgate community stands to benefit from the proposed development that will deliver improved amenity and a new retail offer within a high profile precinct. The project will support a more holistic retail network aligned to government objectives for walkability and a 'best in class' retail environment. The project would support continued growth and a successful, evolving precinct and community in the future.

7.1.1   Methodology

In order to address the potential economic impacts likely to result from the project, this economic impact assessment (including benefits) considers findings from the previous sections and incorporates a review of the following:

- Retail impacts;
- Residential impacts;
- Construction and ongoing employment generation (direct and multiplier);
- Increased Value-Added Output;
- Additional retail expenditure generated by the project; and
- Improved benefits to the surrounding community.

7.2   Retail Impacts

This sub-section reviews the potential impacts that are likely to occur as a result of the retail floorspace planned at the Subject Site. As outlined, the retail component is planned to comprise a major full-line supermarket of 4,011m^2 (including liquor).

In order to assess the likely impact, it is important to understand the local food, liquor and grocery expenditure market as well as the existing and future potential of supermarkets within the surrounding area. This will enable a comparison of performance both with and without the proposed Ramsgate supermarket.

Forecast sales are outlined, noting that supermarkets are defined as food and grocery stores of 500m^2 or larger, with smaller foodstores excluded from this analysis.

For the purposes of this assessment, the first full year of trading for the Woolworths Ramsgate supermarket is assumed to be 2027/28.

7.2.1 Supermarket sales potential

The supermarket sales analysis undertaken for this economic impact assessment has adopted a market share method in line with industry standards for retail impact assessments. A summary of the assessment includes:

- Food and grocery expenditure (ex. liquor) will increase from $203.3 million in 2023 to $222.3 million by 2028 and further to $255.2 million by 2036.

- Typically, 70-75% of food and grocery expenditure is directed to supermarkets in Australia. However, reflecting the under provision of supermarket floorspace in the MTA and the local community profile, this proportion is currently assumed at 60.3% across the MTA. This proportion is assumed to increase slightly to 62.6% by 2028 with the opening of the proposal as well as other proposed expansions such as Coles Ramsgate Beach.

- It is then important to estimate the proportion of food and grocery expenditure that can be retained by MTA supermarkets. In this case, the proportion likely to be directed to the proposed Ramsgate store and others within the MTA, as compared to spending being directed to the larger full-line stores beyond the MTA.

- As there are only three (3) supermarkets currently provided, and only one full-line supermarket, the estimate of retained expenditure is 42.3%, suggesting that 57.7% of all supermarket spending is currently escaping the MTA as it is being directed to stores and centres beyond the MTA. This estimated is supported by a review of mobile phone movement data. After the proposed Ramsgate supermarket (and Coles Ramsgate Beach expansion) this level of retained expenditure is projected to increase to 55.3%. As such, even after the proposed developments, almost 45% of MTA supermarket expenditure is still estimated to be directed to centres outside of the local area.

- Further to the above, additional 14.2% of sales is estimated to be directed to MTA supermarkets from beyond the defined MTA. This reflects the strategic locations of many existing stores along major arterial roads, as well as location coastal areas which will be regularly visited by residents and tourists from beyond the immediate area.

- Additional sales are also allocated in order to account for liquor stores that adjoin, or are incorporated as part of existing and proposed supermarkets. This includes Supabarn as well as the proposed Ramsgate supermarket.

- As a final component, an allowance for non-food items equivalent to 6% of total stores sales is also assumed. This allows for the sale of general merchandise items at supermarkets.

- Taking the above into account, the total volume of sales available to MTA supermarkets is estimated at $67.8 million in 2023, with this amount projected to increase to $103.2 million by 2028 (and following the completion of the proposed Ramsgate supermarket and Coles Ramsgate Beach expansion). These estimates are presented in constant dollars and reflect real growth.

- By applying a market share likely to apply to the proposed Ramsgate supermarket, is it estimated that the Ramsgate supermarket would achieve sales of $38.2 million in 2028 (constant dollars). This would result in around $65 million remaining for the three MTA supermarkets in 2028.

The addition of a contemporary major full-line supermarket at the Subject Site would result in the retention of supermarket expenditure that is currently escaping the MTA.

7.2.2 Potential Trading Impacts

Reflecting the projected market growth and demand for the uses at the proposed development, any negative trading impacts on businesses in the surrounding area is expected to be minimal and within the normal bounds of a competitive market.

In broad terms, any impacts arising from the proposed development will be due to the potential for commercial tenants, future residents and the retail spending of consumers to be diverted from alternative destinations and locations.

When assessing the potential competitive impacts of a proposal, it is important to appreciate that the actual impacts will depend to a large degree on the circumstances of individual projects and businesses, and their response to the introduction of competition. For example, in the retail industry common responses of competing centres and retailers to new competition include:

- Refurbishment and other improvements to facilities and presentation

- Re-investment and expansion of centres and stores

- Re-positioning a store/centre through changes in tenant/product mix and type (e.g. focusing on a key target market)

- Marketing and promotions activity, including enhanced price competition and use of customer loyalty programs to reach consumers.

The same initiatives can apply to existing or future owners and developers in other sectors including commercial and residential.

Reflecting the potential actions that can be implemented in response to market competition, impacts presented in this report should be treated as indicative and used as a broad indication of potential impact.

The proposed Ramsgate supermarket will help to address a substantial undersupply of full-line supermarket floorspace within the local area and furthermore, will assist in satisfying the retail needs of the growing population within Ramsgate and the local area. As such, the proposed development would help to alleviate pressure on the existing supermarket network, supporting market demand and customer need, rather than the development relying purely on the redirection of sales from other retailers and businesses.

As such, the trading impact of the proposed development on any existing facility within the surrounding area is expected to be minimal.

An analysis of the anticipated sales impacts that are likely to result from the proposed Ramsgate supermarket has been undertaken. The analysis considers typical trading impact patterns including that the highest impacts are typically absorbed by the nearest comparable centres with reduced impacts on centres located further away or with an alternative retail offer. In this context, the proposed Woolworths supermarket is generally likely to impact the closest Woolworths supermarket, followed by impacts on other supermarkets (e.g. Supabarn, Coles), followed by smaller scale supermarkets and foodstores which serve a more convenience based role for their immediate population.

Generally retail trading impacts of between 10% - 15% are considered by the industry to be moderate but often acceptable, with impacts less than 10% considered acceptable, and impacts less than 5% considered negligible. Other factors such as market growth, centre performance, future expansions/refurbishments and community benefit should also be considered in assessing impacts.

Detailed calculations of current (2023) trading performance for competitive centres are shown in Table 8 over the page, and are based on published data, where available. Where data is not available estimates based on typical retail performance and our own expectations have been made.

Projected sales impacts that are likely to result from the proposed Woolworths Ramsgate development are summarised as follows:

1. Estimate current sales for existing centres in 2023 (financial year)

2. Project sales for both the existing and proposed centres in 2028 (the assumed first full year of trading for the Ramsgate development). Projected sales allow for market growth as well as expansions and new proposed developments – including projects such as Coles at Ramsgate Beach and the expansion of Southgate Sylvania.

3. Highlight the change in projected sales at each centre in 2028 both with and without the proposed Woolworths Ramsgate development.

4. Outline the impact on sales in 2028 in both dollar terms and as a percentage of total sales.

All sales are presented in constant 2022/23 dollars.

Table 8   Woolworths Ramsgate Projected Impacts, 2023 - 2028

	Unit	Estimated ($) 2023	Projected 2028 ($) Pre Dev.	Projected 2028 ($) Post Dev.	Impact 2028 ($) $M	Impact 2028 ($) %
Ramsgate Proposal	**$M**	**N/A**	**N/A**	**38.2**	**N/A**	**N/A**
Within Trade Area						
Ramsgate	$M	35.0	38.0	36.8	-1.1	-3.0%
Ramsgate Beach	*$M*	*53.4*	*64.4*	*58.9*	*-5.5*	*-8.5%*
- Ramsgate Beach Plaza	$M	17.0	16.7	15.3	-1.4	-8.5%
- Remainder	$M	36.4	47.7	43.7	-4.1	-8.5%
Sans Souci	*$M*	*67.1*	*71.7*	*66.6*	*-5.1*	*-7.1%*
- San Souci Central	$M	42.6	45.3	41.0	-4.3	-9.5%
- Remainder(Rocky Point Road)	$M	24.5	26.5	25.7	-0.8	-3.0%
Beyond Trade Area						
Carlton	$M	17.7	19.1	18.2	-1.0	-5.0%
Kogarah	*$M*	*125.3*	*136.6*	*134.0*	*-2.7*	*-1.9%*
- Kogarah Town Centre	$M	51.8	56.5	54.2	-2.3	-4.0%
- Remainder	$M	73.5	80.2	79.8	-0.4	-0.5%
Rockdale	*$M*	*385.2*	*420.1*	*413.9*	*-6.2*	*-1.5%*
- Rockdale Plaza	$M	210.2	229.2	223.5	-5.7	-2.5%
- Remainder	$M	175.0	190.8	190.4	-0.5	-0.2%
Hurstville	*$M*	*832.0*	*907.2*	*898.8*	*-8.5*	*-0.9%*
- Westfield Hurstville SC	$M	561.7	612.6	606.4	-6.1	-1.0%
- Hurstville Central	$M	80.2	87.5	86.6	-0.9	-1.0%
- East Quarter	$M	39.8	43.4	42.3	-1.1	-2.5%
- Remainder	$M	150.2	163.8	163.4	-0.4	-0.2%
Brighton-le-Sands	$M	77.6	84.6	82.1	-2.5	-3.0%
South Hurstville	$M	28.7	31.3	31.0	-0.3	-1.0%
Southgate Sylvania	$M	221.9	252.3	248.5	-3.8	-1.5%

Note: Assumes Constant Dollars and GST Inclusive

Proposed centres and expansions assumed to be trading for a full year by FY2028

Figures Rounded

Key points to note regarding the analysis of retail impacts include:

- The proposed Woolworths store is projected to record sales of $38.2 million in 2027/28. Of this total:
  – $26.5 million is projected to come as a result from a reduction in expenditure to facilities beyond the MTA (i.e. expenditure retained within the MTA as a result of the proposed development);
  – $9.8 million is projected as a result of redirected spending from competitive supermarket centres within the MTA;
  – $1.9 million is likely to result from impacts on a range of smaller retail facilities within the MTA including those not currently represented in the analysis (including bulky goods and other strip retail facilities within a supermarket anchor).
- The largest impact in dollar terms is projected on San Souci Central (anchored by Supabarn), with impacts projected to be in the order of $4.3 million or -9.5% of total centre sales. The majority of this impact is likely to fall on the full-line Supabarn supermarket, which is the only existing full-line supermarket within the MTA. The centre and store will be impacted in the short term only, with absolute sales projected to be only $1.6 million lower than current levels in 2028. Based on food and grocery expenditure growth within the MTA estimated at around $4.6 million each year, this impact will be quickly absorbed, with the store and centre to benefit from market growth in future years.
- The Ramsgate Beach retail strip, anchored by Coles, is also proposed to be impacted by around $4.1 million (or 8.5%) in 2028 with the majority of sales impact to fall on the Coles supermarket. However, reflecting the proposed Coles expansion, this centre is expected to record sales growth of $7.3 million over the period to 2028 which will mitigate any short term impact from the proposal.

- The IGA centre at Ramsgate Beach (Ramsgate Beach Plaza) is planned to be impacted by 8.5%, or $1.4 million by the proposal. Based on food and grocery expenditure growth within the MTA estimated at around $4.6 million each year, this impact will be quickly absorbed, with the store and centre to benefit from market growth in future years. This centre may also benefit from the Coles expansion and revitalisation of the local strip.

- All other centre impacts are estimated to be less than 5% and as such, are of limited competitive relevance. This is reinforced by the fact that remaining centres are all projected to record sales in 2028 that are higher than existing 2023 levels even after the proposed Ramsgate development.

The result from the individual sales impact assessment indicates that all potential impacts likely to result from the proposed Woolworths Ramsgate development will be within the normal competitive range of less than 10%.

As such, the proposal would not impact on the viability or continued operation of any existing or proposed facility with the local area. Rather, all existing and proposed developments would benefit from future growth in the market.

The substantial level of current escaped expenditure from the Ramsgate MTA highlights the under provision of supermarket facilities in the area currently. The provision of a new major full-line supermarket at Ramsgate as proposed, would provide an essential supermarket offer close to residents' homes, and help reduce the need for residents to travel greater distances across this part of Sydney.

7.3   Residential Impacts

The Planning Proposal includes a provision of 144 dwellings that could be supported upon approval and completion of the project. Assuming the average household size of 2.5 persons per household for the MTA, the project may accommodate up to 360 residents at full occupancy.

It is understood that 17 dwellings are currently supported on the Subject Site. These dwellings could support 43 residents based on the average household size of 2.5. Accordingly, the 360 residents that could be supported at the Subject Site represents a potential net increase of +317 residents.

This net increase in the resident population on the Subject Site would account for just 9.8% of projected residential growth estimated to occur within the MTA over the period to 2036 (of +3,220). As such, the Planning Proposal would represent a small proportion of future residential dwelling requirements and therefore, would not impact on the ongoing viability or continued operation of any existing or proposed residential development.

The provision of residential dwellings within a high amenity location close to jobs and essential community services is a government priority and will support the continued growth of Ramsgate as a key centre and ensure that residents with the local area have access to contemporary housing options. Furthermore, the provision of additional residents will help to activate the Ramsgate retail strip for extended hours both during the day but also in the evenings.

7.4   Economic Benefits

The proposed development has the potential to generate a range of economic benefits both to the local and regional area. A summary of these benefits is presented in this sub-section.

7.4.1   Supporting Employment & Economic Activity

Input-Output modelling

Economic impacts associated with the proposed development have been prepared with input-output modelling undertaken with reference and compliance to best-practice guidelines.

Input-output tables are a 'map' of the economy that track the flow of products, services, and payments through the many industries, households, government organisations and foreign transactions that make up the Australian economy.

Every industry requires inputs from many other industries, plus the inputs of workers and machinery and equipment to produce output. Input-output modelling uses averages derived from the ABS Input Output Tables to estimate the impact on all industries when one industry expands its production. The modelling used in this report is based on the 2020/21 ABS National Accounts release.

As with all economic models, input-output models include a number of limitations which include the following inherent assumptions: unlimited supplies of all resources including labour and capital, prices remaining constant, technology is fixed in all industries, and import shares are fixed.

Having regard for these limitations, the modelling used for the purposes of this assessment applies the **Simple Multiplier effect measure**. The Simple Multiplier effects measure estimates the expansion of other industries required to support the initial (direct) increase in the original industry; and does not include the additional impacts of extra wages and employment income being spent across the economy (spill-over effects).

Use of the **Simple Multiplier effect measure** is in-line with best practice industry standards and reflects a conservative position. Results from the modelling should be interpreted as indicative of the potential impact the project will have on the Australian economy.

The modelling provides estimates of the following economic benefits as a result of the project:

- **Construction Employment** – direct construction job-years supported by construction of the development and indirect job-years supported across all other industries over the construction period.

  'Job-years' is defined as the number of full-time equivalent (FTE) jobs supported over the construction period. i.e. if construction is over 10 years, 100 job-years is equivalent to 10 FTE jobs per year. Only applies to construction employment.

- **Ongoing Employment** – direct and indirect FTE jobs supported by the ongoing operation of the project annually.

- **Value Added** – direct and indirect value added generated during the construction and operational phase of the project.

  Value Added is defined as the wages, salaries and supplements plus gross operating surplus (income earned by businesses) required in producing the extra output (construction investment and operating output/turnover). This represents the standard measure of economic contribution, that is, the increase in economic activity as measured by gross domestic product (GDP).

Estimates of the economic benefits of the proposed development will be realised across the national economy, given the scale and diversity of the New South Wales economy, a large proportion of these benefits will be realised in the local and regional area. The benefits have been prepared for:

- **Construction Phase**: Economic activity during the construction phase of the project which will be spread across the construction program.

- **Operational Phase:** Ongoing economic activity once the project is completed.

Construction Phase

In the absence of definitive construction costs, an illustrative capital investment figure of $100 million has been adopted to represent the relative economic benefits likely to result during construction. This figure is adopted as an indicative guide only, and provides an indication of *employment and benefits generated per $100 million of construction costs during the construction phase*.

For every $100 million of Capital Investment Value (CIV), the construction phase is expected to directly support employment of 130 job-years and deliver a direct value add to the economy of $21.6 million.

When the multipliers are taken into account, total state-wide economy effects over the construction program are forecast to be: employment of 570 job-years and a total direct value-add to the economy of $82.3 million *for every $100 million of Capital Investment Value.*

Table 9   Construction phase economic benefits ($2022/23) – for every $100 million of CIV

	Construction Phase (spread over construction period)		
	Direct	Indirect	Total
Output ($M)	$100.0	$146.9	$246.9
Employment (job-years)	130	440	570
Value Added ($M)	$21.6	$60.7	$82.3

Source: Ethos Urban analysis utilising data from ABS, National Accounts 2020/21; ABS, Consumer Price Index

*Job-years: Number of FTE jobs supported over the construction period. i.e. if construction is over 10 years, 100 job-years is equivalent to 10 FTE jobs per year.

Note: Figures rounded

Operational Phase

Economic benefits associated with the ongoing operation of the proposal once complete and fully occupied have been based on supportable employment estimates for the various uses incorporated within the proposed scheme. These estimates have been prepared with reference to relevant industry benchmarks including the City of Sydney Floor Space and Employment Survey 2017, and Ethos Urban research, and include the assumption of one (1) worker for every $30.2m^2$ of retail floorspace. While it is noted that supermarkets can support higher levels of employment, this ratio has been adopted to present a conservative assumption of potential full-time equivalent (FTE) positions.

Based on the above, and assuming a total retail GFA of $4,011m^2$, the operational phase is expected to deliver the following (direct) benefits: FTE employment of 130 direct ongoing jobs, and a direct value-add to the economy of $13.2 million per annum.

When the multipliers are taken into account, total ongoing economy-wide effects are estimated at: FTE employment of 200 jobs supported and a total value-add to the economy of $21.1 million per annum once complete and fully occupied.

It is important to note that these projections reflect the total economic benefit, rather than the net gain as a result of the project compared to the employment provision at the existing building.

Table 10   Estimated Ongoing Employment (total employment)

	Operational Phase (annual)		
	Direct	Indirect	Total
Output ($M)	$22.6	$16.5	$39.1
Employment (FTE)	130	70	200
Value Added ($M)	$13.2	$7.9	$21.1

Source: Ethos Urban analysis utilising data from ABS, National Accounts 2020/21; ABS, Consumer Price Index

Note: Figures rounded

7.4.2   Expenditure Activity

Once complete and fully occupied, the development will accommodate additional residents on site. This resident population would support an increase in retail expenditure that will be directed to local businesses.

The Planning Proposal aims to facilitate the development of 144 dwellings based on the proposed residential GFA of $16,849m^2$. Assuming the average household size of 2.5 across the MTA (ABS Census 2021), the Subject Site could support an estimated 360 residents at full occupancy.

A review of retail expenditure per capita by residents within the MTA shows that on average residents spend in the order of $17,760 each year on retail items (2023 dollars). Accordingly, with 353 residents at the Subject Site, a total of $6.3 million in additional retail expenditure could be generated each year (see **Table 11**). This would include spending on food, liquor and groceries, food catering, non-food items and services. This additional retail expenditure will support existing and proposed retail facilities both at the Subject Site and within the surrounding area.

Table 11   Retail expenditure benefits

Measure	Value
Estimated number of new residents	353

Measure	Value
Per capita retail expenditure on local retail per annum ($)	$17,760
Increase in expenditure on local retail per annum ($)	$6,394,000

Source: Marketinfo 2016, Ethos Urban
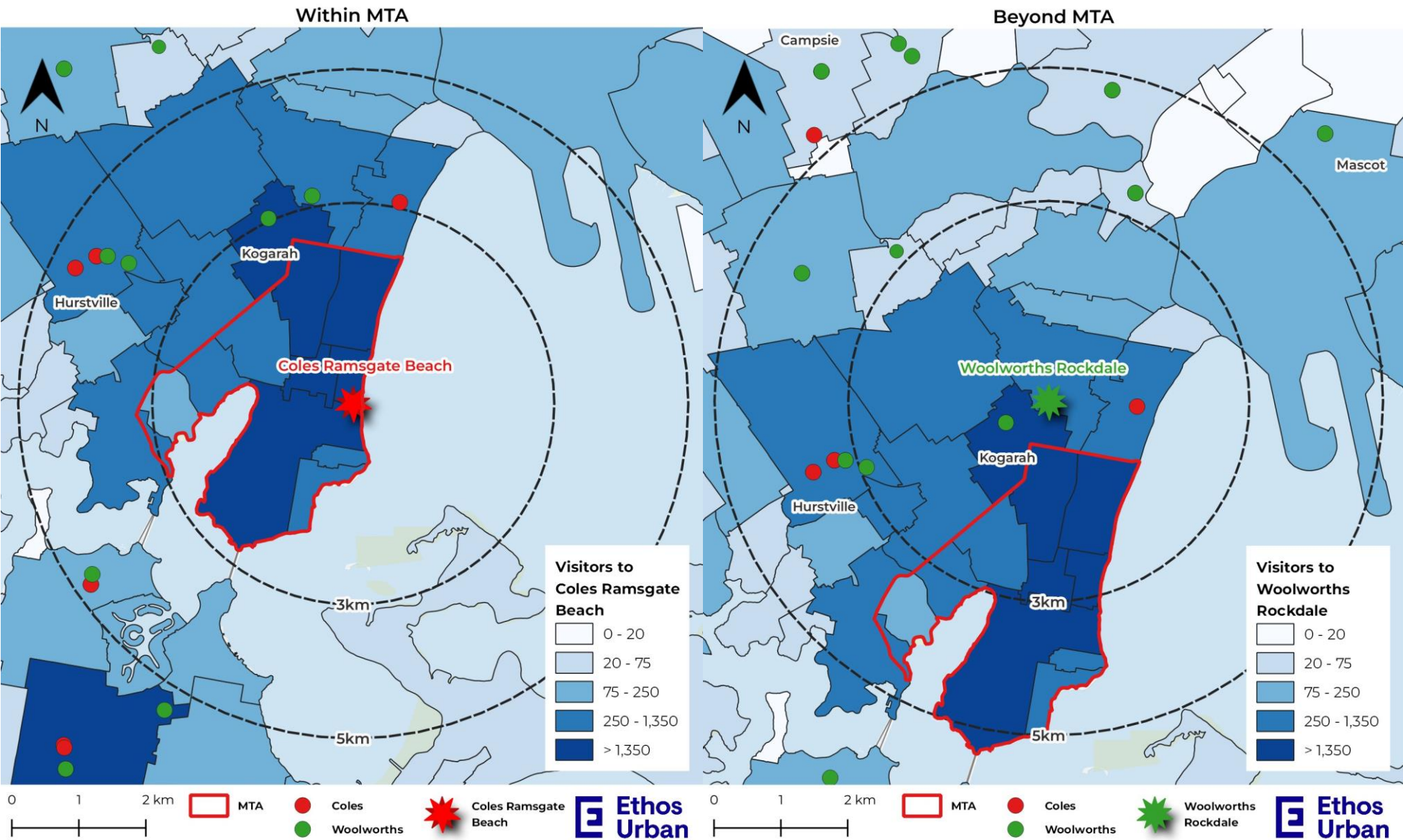
Note: Figures rounded
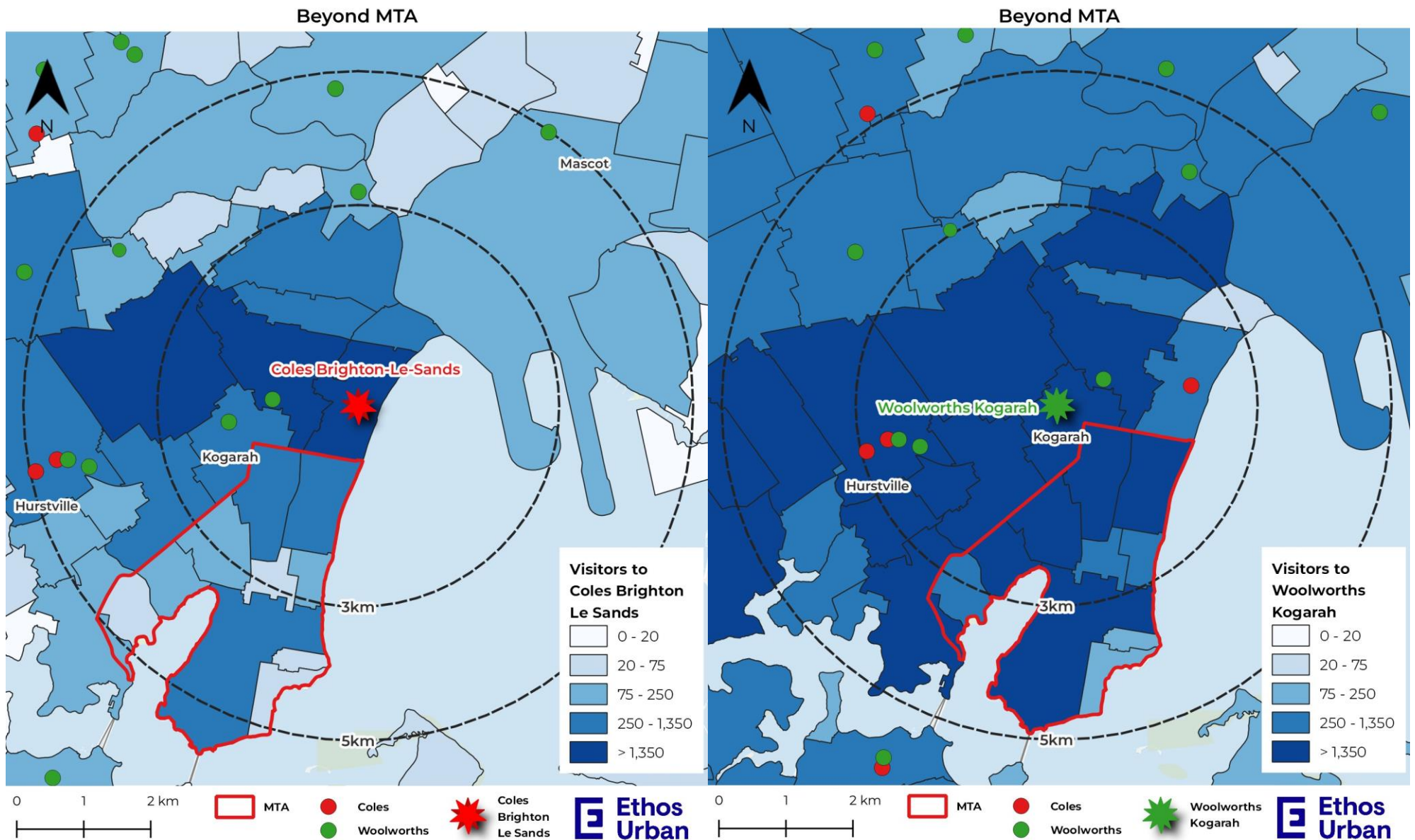
7.4.3   Other Benefits

The Planning Proposal is likely to result in a range of other economic and community benefits including:

- Provision of a new and essential retail offer to the local area that is not currently provided, including a major full-line supermarket and new services such as 'direct to boot' and online services which will improve customer choice, amenity and price competition in the local area, to the overall benefit of the community.

- Activation of a high-profile site with proposed uses including a full line supermarket and retail parking that anchor Ramsgate as a community and retail destination and deliver flow on benefits to surrounding businesses.

- Enhance access, connectivity and walkability within the MTA by establishing an active ground floor use along Rocky Point Road, and aligning with the surrounding residential and retail offering.

- Increase connectivity and activation in Ramsgate, including after hours and on weekends through the provision of a new retail destination anchor tenant. An enhanced retail and residential outcome will generate additional pedestrian traffic and dwell times in the precinct to the direct benefit of local businesses.

- Improve amenity, by reducing travel time and traffic congestion by enabling local residents to visit a major full-line supermarket locally that will provide a larger produce range than existing stores, alleviating some of the need to travel to other stores and centres outside of the local area.

- An improved built form outcome on the Subject Site and Rocky Point Road, including a contemporary and high-quality design that will complement and enhance the existing character and density of the area. This includes improved through-site connectivity planned to be delivered through the proposal.

- Provision of new housing stock that provides additional housing choice and diversity in the local area within a highly accessible, contemporary development.

- Support the aspiration for a 30-minute city by providing essential retail goods and services, employment space and residential dwellings in a strategic and easily accessible location along an accessible corridor.

- Support the future promotion of Ramsgate to a Local Centre by providing essential supermarket services for the community.

Overall, any impact from the proposed development will be limited, with the proposal not likely to impact on the ongoing operation or viability of any existing or proposed facility or centre. All centres, and the region overall, stands to benefit from increased market growth as well as increased activation of the Subject Site as a result of the Planning Proposal.

Appendix A – Near Mobile Location Data

Beyond MTA

Visitors to Coles Brighton Le Sands

	0 - 20
	20 - 75
	75 - 250
	250 - 1,350
	> 1,350

MTA

Coles

Woolworths

Coles Brighton Le Sands

Beyond MTA

Visitors to Woolworths Kogarah

	0 - 20
	20 - 75
	75 - 250
	250 - 1,350
	> 1,350

MTA

Coles

Woolworths

Woolworths Kogarah

Source: Ethos Urban using Near mobile location data