HillPDA CONSULTING

CUMBERLAND LOCAL CENTRE

Economic and retail Analysis

Prepared for Cumberland City Council

February 2024

1.0 INTRODUCTION

Cumberland City Council (Council) has commissioned HillPDA to undertake a comprehensive economic and retail analysis of 25 local shops situated within Zone B1 Neighbourhood Centres across the Cumberland Local Government Area (LGA).

1.1 Project objectives

The objectives of this study are to:

- Identify and describe current demand and supply influences across the Cumberland LGA, including competitor analysis and broader macro influences
- Undertake retail and commercial projections and floorspace demand modelling to 2041 for each of the 25 local shop clusters (refer to Section 1.2 for the locations of the local shop clusters)
- Undertake a SWOT analysis of each of the sites in the study
- Develop a categorisation system for the aforementioned local shop clusters.

1.2 The 25 local shop clusters

A scoping report for the Cumberland Local Shops Study has previously been prepared which identified 25 local shop clusters as having improvement opportunities and are the subject of the analysis.

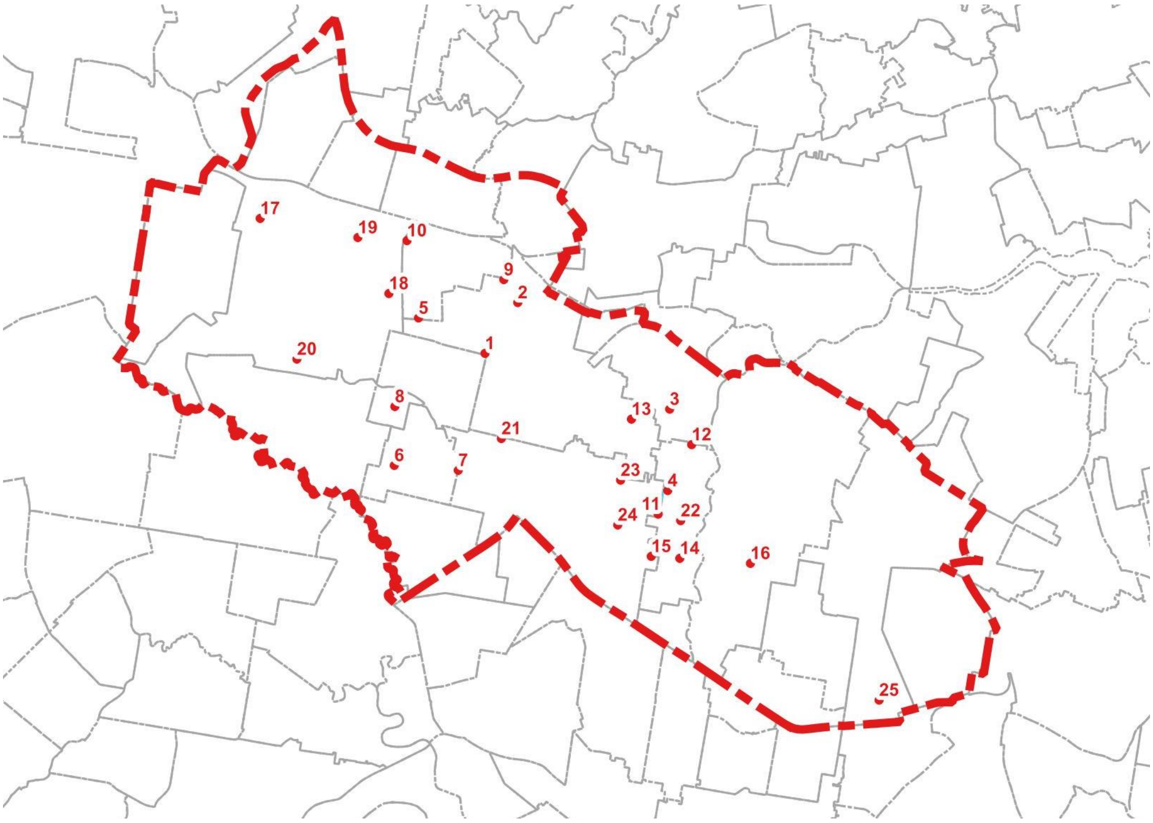
The figure below shows the location of the 25 local shop clusters of relevance to this study. The local shop clusters range in size and services offered, from two commercial/retail shops to one that provides around 18 commercial/retail shops and another that incorporates a full-lined supermarket.

Specifically, the local shop clusters that are the subject of this study are:

1. Burnett St Shops (381 Merrylands Rd, Merrylands and surrounds)
2. Hilltop Rd Shops (3 Hilltop Rd, Merrylands)
3. 6 Louis St, Granville (and surrounds)
4. 12 Dellwood Street, South Granville (and surrounds)
5. 33-39 Irrigation Rd, South Wentworthville
6. 121-123 Fairfield Rd, Guildford West
7. 176 and 223-505 Fowler Rd, Guildford West
8. 21-39 Dell St, Smithfield (Woodpark Shopping Centre)
9. 51 Coleman St, Merrylands
10. 49 Old Prospect Rd, South Wentworthville
11. 342, 344 and 348 Blaxcell Street and 1 Guildford Road, South Granville
12. 165 Clyde Street, South Granville (and surrounds)
13. 52-56 Excelsior Street, Merrylands
14. 48-62 Wellington Rd and 359-365 Clyde St, South Granville
15. 38-42 Rawson Rd, Guildford
16. 234-238 Cumberland Rd, Auburn
17. Bathurst St Shops: 41-51 Bathurst St, Greystanes and Surrounds
18. Damien Ave Shops: 7 Lucinda St, Greystanes
19. Maple St Shops: 41-49 Maple St, Greystanes

20. Carnation Street: 2032 Carnation St, Greystanes
21. 126-130 Hawksview St, Guildford
22. 291-295 Clyde St, South Granville
23. 174-178 Excelsior Street, Guildford
24. 271-277 Excelsior St, Guildford
25. 17 Brooks Circuit, Lidcombe

Figure 1: 25 Local shop cluster locations



Source: Cumberland Council

2.0 CURRENT DEMAND AND SUPPLY INFLUENCES

This chapter considers the economic environment in which Cumberland's retail sector operates in. As part of this analysis, key retail drivers such as population growth, socio demographics, retail spend as well as visitation numbers and spend are explored along with other macro economic factors.

2.1 Retail drivers

2.1.1 Population growth

Historically, the Cumberland LGA has also shown strong and steady population growth. In 2021, the Estimated Resident Population (ERP) in the Cumberland LGA was approximately 236,996 persons, which was 33,815 (+17%) above the 2011 Census level and represents a growth rate of 1.6% per annum.

Population forecasts in the Cumberland LGA at suburb level to 2036 are shown in the table below and suggest that strong population growth is expected to continue to 2036. Population levels are projected to grow across all local areas, with the exception of Pemulwuy. In absolute terms Merrylands (Central) and Auburn (North) is projected to house most of this growth, with above LGA average rates projected to occur in Pendle Hill, Auburn (North), Westmead - Mays Hill, Merrylands - Holroyd, Wentworthville and Lidcombe (North). This is consistent with Council's progressed planning for a number of centres and strategic corridors to facilitate additional housing supply and jobs growth, with Merrylands and Wentworthville Centres and Parramatta Road Corridor the focus of much of this planning for growth. This population growth will continue to drive demand for conveniently located retail and commercial services.

Table 1: Cumberland LGA population forecasts

Region	2021	2026	2031	2036	Change 2021-36 No.	Change 2021-36 (%)	Growth Rate p.a. 2021-36 (%)
Cumberland Council	236,965	261,059	268,152	276,414	39,448	16.6%	0.8%
Auburn (North)	10,708	15,347	16,718	18,603	7,895	73.7%	2.8%
Auburn (South)	28,927	30,703	30,765	31,027	2,100	7.3%	0.4%
Berala	8,732	8,985	9,145	9,502	770	8.8%	0.4%
Girraween - Toongabbie	9,709	10,478	10,756	11,175	1,466	15.1%	0.7%
Granville	10,696	11,180	11,159	11,346	650	6.1%	0.3%
Greystanes	23,526	24,230	24,233	24,488	962	4.1%	0.2%
Guildford (East)	15,698	16,566	16,899	17,462	1,765	11.2%	0.5%
Guildford (West) - Yennora	8,619	9,052	8,970	9,071	452	5.2%	0.3%
Guildford West - Woodpark - Smithfield	7,556	7,943	7,954	7,944	388	5.1%	0.3%
Lidcombe (North)	10,281	12,269	13,615	14,903	4,622	45.0%	1.9%
Lidcombe (South) - Rookwood	10,672	11,359	11,829	12,504	1,832	17.2%	0.8%
Merrylands - Holroyd	34,074	40,043	41,178	42,762	8,688	25.5%	1.1%
Merrylands West	7,110	6,961	6,781	6,685	-425	-6.0%	-0.3%
Pemulwuy	5,520	5,124	4,846	4,674	-846	-15.3%	-0.8%
Pendle Hill	6,268	8,642	10,710	10,818	4,550	72.6%	2.8%
Regents Park	4,369	4,869	4,750	4,704	335	7.7%	0.4%
South Granville - Chester Hill	6,838	7,098	7,100	7,264	426	6.2%	0.3%
South Wentworthville	6,967	7,307	7,363	7,492	525	7.5%	0.4%
Wentworthville	10,809	12,292	12,808	13,321	2,512	23.2%	1.1%
Westmead - Mays Hill	9,887	10,613	10,575	10,668	782	7.9%	0.4%

Source: Forecast.ID, Cumberland Council

2.1.2 Cumberland's socio-demographic profile

The below provides a high-level overview of the demographic profile for Cumberland LGA (refer to Appendix A for Cumberland LGA's demographic profile detailed table):

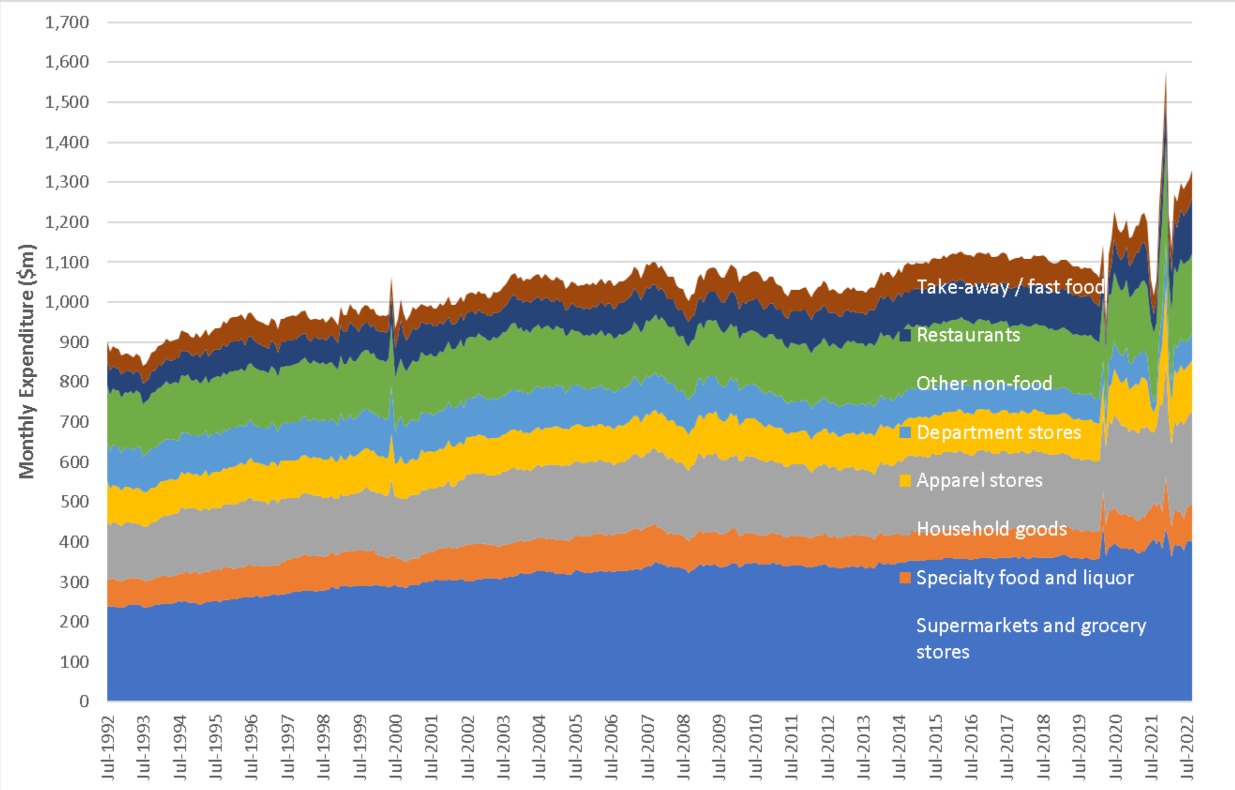
- A higher proportion of people in younger age groups (0-17 years) and lower proportion of people in the older age groups (60+ years) in Cumberland LGA compared to Greater Sydney.
- The LGA witnessed sharpest increases in service age groups: parents and homebuilders (35 to 49) (+10,838 people); young workforce (25 to 34) (+8,946 people); empty nesters and retirees (60 to 69) (+5,117 people) and primary schoolers (5 to 11) (+4,539 people) between 2011 and 2021, suggesting growing number of families with dependent children in the LGA.
- A lower proportion of residents aged 15 and over holding formal qualifications (Bachelor or higher degree; Advanced Diploma or Diploma; or Vocational qualifications) in Cumberland LGA compared to Greater Sydney (i.e. 37.0% of the population aged 15 and over held educational qualifications, and 42.2% had no qualifications, compared with 57.8% and 34.2% respectively for Greater Sydney). Notwithstanding this, the number of residents attaining bachelor degrees or higher has substantially increased between 2016 and 2021 (+23,348 persons) and at much faster rates than all other forms of qualifications and those with no qualifications.
- Couples with children represented 38.2% of households in Cumberland LGA in 2021, compared with 34.4% in Greater Sydney.
- There was a higher representation of 'couples with children' and 'single-parent' families in the Cumberland LGA compared to Greater Sydney, and lower representations of 'lone person' households and 'couples without children.'
- The largest increases in household types in Cumberland LGA between 2011 and 2021 were: couples with children (+3,797 households), lone person (+2,311 households), couples without children (+2,197 households) and group household (+2,077 households).
- In the Cumberland LGA, 20.6% of households earned an income of $3,000 or more per week in 2021 which is less than Greater Sydney. Cumberland LGA had a higher proportion of low income households (those earning less than $800 per week).

The above demographic profiles suggests that Cumberland LGA is younger and less affluent than Greater Sydney, with households being predominately families with dependent children. These groups typically have lower propensities to spend on discretionary items and spend is skewed towards essentials (food and groceries) retailing and services due to their limited incomes and other constraints. This is reflected in the local retail and service offering.

2.1.3 State retail expenditure by store type

As shown in the figure below, retail spend per capita in NSW (measured in 2022 dollars) has increased from around $883 per month in 1992 to around $1,265 in 2022 – an increase of around 43%. Most of the growth happened during the nineties and early noughties during the period of 'economic rationalism'. Much of this growth happened due to a number of factors including increased participation of women in the workforce and dual income households, increasing professionalism, technological change and increasing consumerism. As a result consumers increased spending due to more discretionary or additional income.

Figure 2: Monthly retail spend per capita in NSW (seasonally adjusted) 1992 to Jul 2022 (in 2022 dollars)



Source: ABS Retail sales, population estimate and CPI (all capital cities)

From around 2006 retail sales in NSW has been largely flat in real terms per capita. 2006 to 2008 was a short period where rising interest rates and petrol prices resulted in some contraction in spend, particularly on domestic travel and luxury goods. This was followed by the global financial crisis (GFC) where job security was less certain. Since then, non-food retail sales have been quite flat if not declining until just recently.

The other interesting trend has been the changes in consumer preference between store types. In the 1980s department stores captured around 15% of total sales, with the average NSW resident spending around $120 per month (in 2021 dollars) in department stores. As at June 2021, NSW residents were spending around $60 per month in department stores (less than 6% of total expenditure on retail goods and services).

Supermarkets captured around 24% of total NSW expenditure in the 1980s (less than $220 per person per month in 2021 dollars). This has now crept up to around 32% of total expenditure in June 2021 ($380 per person per month). Spend in restaurants and the like also increased from around 5% ($40 per person per month in 2020 dollars) to more than 7% ($90 per person per month) over this same period. Spend on food generally[1] has increased from 43% of total NSW retail sales in the 1980s to around 53% in 2020.

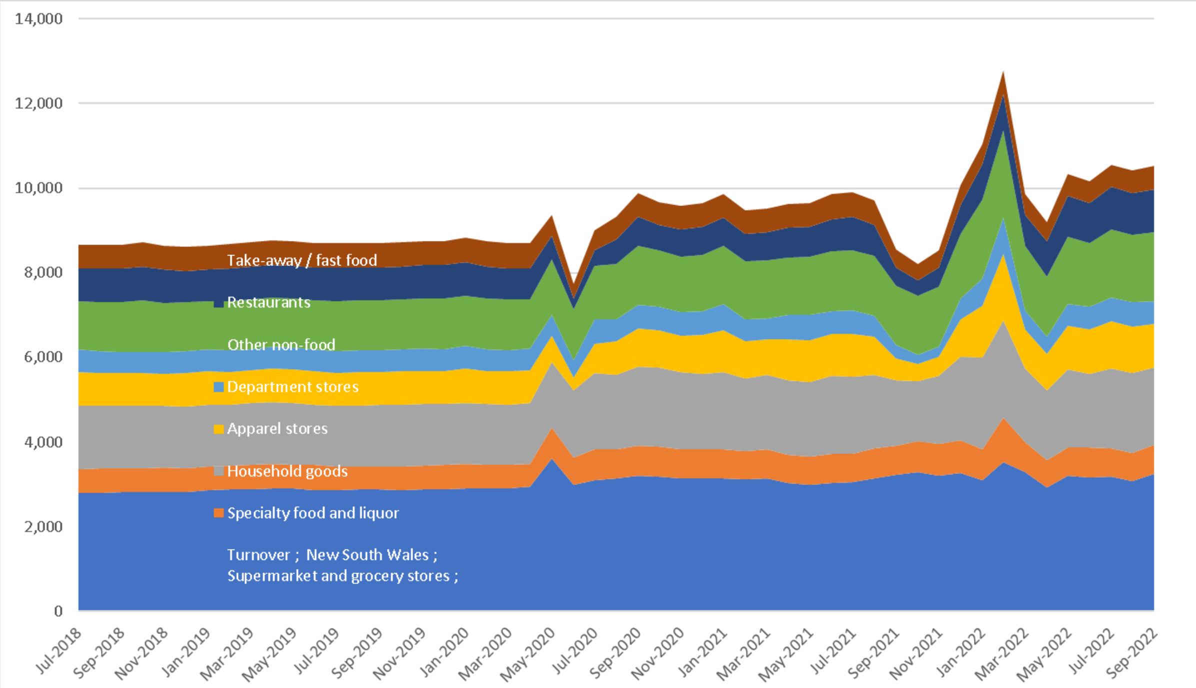
Impacts of COVID 19

Over the three years to January 2021, total monthly retail turnover increased by $1.1 billion or 12% to $9.5 billion.

However, close analysis reveals a sharp spike in turnover in the month of March 2020, with monthly turnover increasing to $9.4 billion. This was up from $8.7 billion in February 2020. This may have been the result of "panic buying" as borders closed and lockdown measures were implemented due to COVID-19.

[1] Includes spend in supermarkets, restaurant and cafe retail

Figure 3: Total retail sales per quarter in NSW (seasonally adjusted) April 2019 to Sep 2022 ($m)



Source: ABS Retail Sales

The spike in retail turnover in May 2020, was primarily led by supermarket expenditure which increased by more than 25% above the monthly average in the previous year. As expected with lockdown measures, turnover in restaurants fell more than 55% over March and April.

Following the March 2020 spike, retail turnover plummeted $1.6 billion dollars (17%) in the month of April. It was the hardest month for restaurants with a turnover of around one third the normal level. Sales in apparel stores were also around 40% of normal levels. Only hardware bucked the trend with a 10% increase in sales compared 2019 levels. Retail turnover spiked again in December and January 2022 which coincided with the holiday season and relaxing of the coronavirus measures, before plummeting again in March 2022 with rising concerns about the cost of living. Retail turnover has remained relatively steady May 2022.

2.1.4 Visitation growth and spend

During the 2021/22 period, Cumberland LGA experienced a significant decline in international visitor nights, with a total of 257,092 nights recorded. This figure represented 100.0% of the overall visitor nights, encompassing both domestic and international visitors[2]. The decrease in international visitor nights can be attributed to the border restrictions and lockdowns imposed as a result of the pandemic.

In contrast, prior to the pandemic, Cumberland City LGA had a substantial number of visitor nights, ranging from 2,196,470 to 3,509,022 between 2015/16 and 2019/20[3]. This data indicates a much higher level of both international and domestic visitor activity during that period.

As the effects of the pandemic diminish, there is an anticipation that visitation and visitor nights will recover in Cumberland LGA. Cumberland City Council indicates that witness levels are already returning to pre-pandemic levels, reflecting a positive trend in the tourism sector. Domestic visitor nights, particularly those driven by family visits, are expected to contribute significantly to the rebound of tourism activity in Cumberland LGA.

[2] Economy.ID Cumberland City Tourism Visitor Summary 2021/22
[3] Economy.ID Cumberland City Tourism Visitor Summary 2021/22

Tourism Research Australia projects that domestic visitor nights will grow by around 3.2% from 2022 to 2027 in NSW[4]. It is reasonable to expect that Cumberland Local Government Area (LGA) will also experience some growth in domestic visitor nights over this same period. Considering the limited accommodation options within the LGA and the fact that visiting family and friends is the primary reason for visits[5], it is likely that a significant portion of visitors (including the increased visitation) to Cumberland LGA will choose to stay with family and friends in residential areas. As a result, these visitors are also likely to frequent the neighbourhood centres within the LGA, including the 25 local shop clusters examined in this study.

As such these local shop clusters can play a vital role in facilitating and enhancing the visitor experience, serving as gathering places and offering a range of amenities and services to support both local residents and visitors alike.

2.1.5 Other macroeconomic influences

Below is a high-level overview of other macroeconomic factors which directly or indirectly influence Cumberland's retail sector.

Prices and interest rates: Consumer spending on goods is significantly influenced by prices, which are naturally affected by the rate of inflation. This is why the producer price index (PPI) and the consumer price index (CPI) are considered leading economic indicators.

When inflation rates are high, the purchasing power of consumers diminishes. This reduces the likelihood of consumers having extra income to spend after meeting their basic needs such as food and housing. Additionally, higher prices on consumer goods discourage spending.

Interest rates can also impact the level of spending on consumer goods substantially. Higher interest rates (generally through contractionary monetary policy) are typically associated with lower discretionary spend, with consumers cutting back their spend across a range of retail categories. National interest rates continued to fall post-GFC crisis and were at a historical low to 2022. Australia's official interest rate has since increased to combat rising inflation. As interest rates continue to increase over the medium term this will discourage some spend, with residents more inclined to save their disposable income. The reduced propensity to spend, however, will be somewhat offset by wage growth[6].

GDP and economic growth: Retail sales are driven by the economic environment. A robust economy is typically associated with higher disposable income and increased retail expenditure. It also allows retailers to sell more valuable goods, such as high-end electronics. On the other hand, a sluggish economy decreases consumer confidence and can cause people to spend less, leading to declining sales and forcing retailers to lower their prices[7]. Gross Regional Product (GRP) is a measure of the size or net wealth generated by a local economy[8]. Economic growth is usually measured by the percentage increase in GRP. Economy.ID estimates that over the 14 years to June 2022, Cumberland City Council recorded a $2.5 billion increase in its GRP, with GRP reaching $13.7 billion in June 2022. The average annual proportional change over this 14-year period was around 1.5%.

Consumer confidence: The demand for consumer goods is also influenced by consumer confidence. When consumers feel optimistic about both the state of the economy and their own financial future, they are more likely to purchase more consumer goods, regardless of their current financial situation. High levels of consumer confidence can have a significant impact on consumers' willingness to make large purchases and use credit to do so. The Westpac-Melbourne Institute Index of Consumer Sentiment for Australia rose 0.2% from 79.0 in May 2023 to 79.2 in June 2023, which is close to historical lows. This is due to the continued

[4] TRA (2022) State and territory domestic forecast table
[5] Economy.ID Cumberland City Tourism Visitor Summary 2021/22
[6] Reserve Bank of Australia (2023) Measures of Consumer Price Inflation; HillPDA Research 2023
[7] Lauren Treadwell (2019) The Role of Macro Environment in the Retail Industry
[8] Economy.id Cumberland City Council (2023)

impact of high inflation, rising interest rates, and economic uncertainties. A particular area of concern is the outlook for sales of major household items[9].

The latest data shows that the 'family finances, next 12 months' sub-index has declined by 2.1% to 84.0, indicating a decrease in confidence regarding personal financial situations in the coming year. The 'economic outlook, next 12 months' sub-index remained weak and essentially unchanged at 77.2. Attitudes towards major purchases have also deteriorated, with the 'time to buy a major household item' sub-index falling by 6.5% to a low level of 76.4. This suggests that consumers are less inclined to make significant purchases at the moment[10].

One area of concern is job confidence, as indicated by the rise of 6.6% in the Westpac-Melbourne Institute Unemployment Expectations Index to 131.3. This suggests that expectations of unemployment levels are increasing, reflecting uncertainty in the labour market[11].

On a positive note, the 'economic outlook, next five years' sub-index recorded a significant monthly gain, rising by 6.3% to 92.7[12]. This suggests some optimism about the longer-term economic prospects.

Overall, the data indicates a mixed sentiment among consumers. While there are concerns about family finances, job prospects, and major purchases, there is also some optimism regarding the economic outlook in the longer term. It will be important to monitor these indicators to assess the evolving sentiment and its potential impact on economic activity. It is assumed, however, that consumer confidence will return as economic conditions improve.

Employment: The demand for consumer goods is greatly influenced by the level of employment, as it impacts the number of individuals receiving a regular income and anticipating its continuation, thus allowing for discretionary spending. Consequently, the local unemployment rate report is a significant economic leading indicator that provides insights into consumer goods demand. Cumberland LGA's unemployment rate has remained above the Greater Sydney average, which is consistent with the lower annual per capita spend (refer to Section 3.3).

Table 2: Unemployment

Year	Cumberland City			Greater Sydney
	Unemployed people	Labour force	Unemployment rate %	Unemployment rate %
Dec-22	6,908	120,566	5.7	3.5
Dec-21	9,991	117,122	8.5	5.4
Dec-20	11,606	117,442	9.9	6.2
Dec-19	9,520	119,915	7.9	4.3
Dec-18	9,210	112,945	8.2	4.2
Dec-17	7,352	111,138	6.6	4.6
Dec-16	7,572	108,010	7	4.8
Dec-15	8,925	106,677	8.4	5
Dec-14	9,110	103,289	8.8	5.1
Dec-13	10,571	98,306	10.8	5.2
Dec-12	6,789	96,648	7	4.7
Dec-11	7,534	95,140	7.9	4.9
Dec-10	8,219	91,193	9	4.9

Source: Cumberland City Council EconomyID 2023

[9] The Westpac Melbourne Institute Consumer Sentiment, University of Melbourne June 2023
[10] The Westpac Melbourne Institute Consumer Sentiment, University of Melbourne June 2023
[11] The Westpac Melbourne Institute Consumer Sentiment, University of Melbourne June 2023
[12] The Westpac Melbourne Institute Consumer Sentiment, University of Melbourne June 2023

2.2 Supply influences

Understanding the local retail hierarchy and its competitive offer is an essential step in understanding the viability of the local shop clusters and defining their trade area. The below section provides a brief overview of the key centres in the locality and subregion.

2.2.1 Parramatta Regional City

Parramatta CBD provides an estimated 887,268sqm of commercial office space[13] and over 200,000sqm of retail floorspace. The prime retail component of the CBD is located along Church Street, between the Parramatta River (north) and the Westfield Shopping Centre (south).

Parramatta CBD as a retail centre has an extensive trade area covering the central western suburbs of Sydney. The main retail focus of the CBD is Westfield Parramatta which provides 137,236sqm of gross leasable area (GLA), including 118,855sqm of occupied retail space (GLAR) and is anchored by Myer, David Jones, Kmart, Target, Woolworths and Coles[14].

For the year to December 2022 Westfield Parramatta reported a turnover of $889.60 m which ranked the centre 13th nationally out of the 91 similar sized shopping centres in Australia (centres greater than 50,000sqm GLA retail floorspace) as recorded by Shopping Centres News (SCN). However, in terms of retail turnover density (measured as $/sqm) Westfield Parramatta was ranked 41 with an RTD of $7,882/sqm,[15] being 1% above the median.

Plans for a 47-storey office tower above Westfield Parramatta, which will add thousands of square metres of new commercial space has also been approved by the NSW Government[16].

Outside Westfield Parramatta along Church Street, George Street and Macquarie Street are numerous specialty shops and arcades. Some of the major anchor stores located outside of Westfield Parramatta include JB Hi-Fi and Officeworks.

The northern end of Church Street has developed into a European 'eat street' with al-fresco dining. The southern end of Church Street contains a large number of Asian stores, Chinese and Indo-Chinese restaurants.

The recent Parramatta Square development along Darcy and Macquarie Streets added a further 6,600sqm of retail floorspace to Parramatta CBD[17].

2.2.2 Merrylands Town Centre

Merrylands is the largest centre in the Cumberland LGA. Stockland Merrylands dominates retail provision in the centre with 59,461sqm of GLA retail floorspace[18] including Woolworths, Coles and Aldi supermarkets, Big W, Kmart and Target DDSs and 164 specialties. The centre achieved total retail sales of $415.78m in 2022. RTD was $6,993/sqm, 11% below the median for centres over 50,000sqm in size[19].

The balance of retail provision in Merrylands town centre is strip retail mainly fronting Merrylands Road just south of Stockland.

[13] Parramatta Office Market Report March 2022
[14] Property Council of Australia NSW/ACT Shopping Centre Directory 2020
[15] Shopping Centre News Big Guns 2023
[16] HillPDA research as sourced from CordellConnect 2023
[17] Parramatta CBD Retail Impact Study, MacroPlan Dimasi (2013)
[18] PCA Shopping Centre Directory 2022 and Shopping Centre News Big Guns 2023
[19] Shopping Centre News Big Guns 2023

2.2.3 Lidcombe Central

Lidcombe is another key regional centre in the Cumberland LGA, with vast majority of this retail space provided at Lidcombe Centre (32,655sqm of GLA). The centre is anchored by an Aldi supermarket and includes around 65 specialty retailers[20]. The centre achieved total retail sales of around $183.31 million in 2020/21[21]. The RTD was $5,585/sqm which was 26% below the median for similar sized centre at the time (i.e. between 20,000 to 50,000sqmin size). Strip retailing exists on both Railway Street and Joseph Street adjacent to Lidcombe Railway Station.

2.2.4 Auburn Town Centre

The Auburn Town Centre boasts a vast array of shopping options, including three major supermarkets, namely Coles, Woolworths, and Aldi, as well as a wide range of strip shops. The entire retail floor space of the Town Centre is estimated to be approximately 35,000sqm[22].

The primary retailing hub of the Town Centre is the enclosed Auburn Central centre, located adjacent to the Auburn railway station. This 13,567sqm sub-regional centre is anchored by Woolworths (3,650sqm) and Aldi supermarkets. Additionally, Auburn Central has over 50 specialty shops spread across two levels. The centre achieved total retail sales of $91.87 in 2021/22. RTD was $8,418/sqm, 9% below the median for centres below 20,000sqm in size[23]. Nearby Auburn Shopping Arcade provides a further 2,000sqm of retail floorspace.

In 2011, a 14,000sqm Costco store opened at 12-17 Parramatta Road, Auburn. This store offers groceries, fresh food, and a wide range of general merchandise, making it the only Costco in the Sydney Region at present, with a likely metropolitan-wide catchment.

2.2.5 Wentworthville Town Centre

Wentworthville Town Centre has experienced significant changes in its retail landscape over the past few decades, driven by shifts in local demographics and consumer preferences. Retail and commercial activities are primarily concentrated along Station Street and Dunmore Street, where a variety of businesses have established themselves.

One notable development in the retail sector has been the emergence of South Asian retailers, including two large South Asian supermarkets. These supermarkets have gained popularity and have become destination shopping locations, attracting visitors from across Sydney. They cater to the specific needs and preferences of the South Asian community, offering a wide range of products and creating a unique shopping experience.

The retail landscape in Wentworthville is set to undergo further changes with the redevelopment of the former Mall centre along Dunmore Street. Plans are in place to transform the site into a larger and modern shopping centre. The redevelopment project will feature a supermarket with a floor area of 4,000sqm on the ground floor, along with an additional 4,400sqm of retail and commercial tenancies on both the ground floor and the first level. Additionally, the project includes the construction of four residential buildings, which will provide a total of 523 apartments.

1km south of the town centre, is south Wentworthville Village Centre. South Wentworthville has a large catchment area which extends as far north as North Wentworthville, west to Pendle Hill and east to Westmead. Wentworthville Shopping Plaza, north of the Great Western Highway, dominates retail provision in the centre providing approximately 6,300sqm GLA of shop front retail floorspace[24]. It is anchored by a Woolworths supermarket (3,883sqm). There is a freestanding Aldi supermarket 1,366sqm GFA on the

[20] PCA Shopping Centre Directory 2022 and Shopping Centre News Big Guns 2023
[21] Shopping Centre News Little Guns 2021 –the latest reported MAT levels that could be sourced for Lidcombe Central
[22] HillPDA Research, Leyshon Consulting (2015)
[23] Shopping Centre News Mini Guns 2022
[24] PCA Shopping Centre Directory 2020

southern side of the Great Western Highway in addition to a number of large stand-alone speciality food, auto and restaurant uses including Hungry Jacks and Dan Murphy's.

2.2.6 Granville Town Centre

Granville Town Centre features retail uses on both sides of the railway station, with a predominant concentration of retail activities to the south. The town centre comprises a total of 106 shopfront units, offering approximately 13,000sqm of retail-related shopfront floorspace[25].

In addition to its retail offerings, the town centre also incorporates various civic and educational functions. These include Granville RSL, which serves as a community hub, as well as important facilities like Granville Boys High School and Granville Town Hall. These civic and educational functions contribute to the overall character and vitality of the town centre, providing essential services and amenities for residents and visitors.

2.2.7 Pemulwuy Marketplace

The Pemulwuy retail precinct is relatively new having been developed to serve the population moving into the residential release areas of the same name. The Pemulwuy Marketplace is a purpose built shopping centre of around 5,200sqm and is anchored by a Woolworths supermarket of 3,940sqmand includes a further 13 specialty retailers[26].

2.2.8 Fairfield Town Centre

Retail facilities within the Fairfield Town Centre include:

- Fairfield Forum, a sub-regional centre providing some 17,700sqm of GLA. Fairfield Forum is anchored by a Kmart discount department store of 4,848sqm as well as Coles supermarket of 3,054 sqm and Aldi supermarket of 1,624sqm. Some 50 retail specialty tenants are also provided[27].
- Woolworths (3,954 sqm) anchors Fairfield City Central which provides some 21,300 sqm of GLA and also includes over 85 retail specialty tenants[28].
- A large provision of retail specialty floorspace is also provided within the broader Fairfield Town Centre, estimated to total some 17,000 sqm of retail floorspace.

2.2.9 Guildford Village

Guildford Village provides retail uses along Railway Terrace and both sides of Guildford Road to Bolton Street. The centre provides a Foodworks supermarket of 800sqm fronting Railway Terrace. Based on the HillPDA floorspace survey in 2015 the centre contains 76 shopfront units and provides approximately 7,200sqm of retail-related shopfront floorspace[29]. In addition to the retail space is the Guildford Hotel and a number of medical services.

2.2.10 Greystanes Village Centre

Greystanes Village Centre is located on Merrylands Road between Braeside Road and Cumberland Road. This centre comprises 6,000sqm of floorspace including Woolworths (3,420sqm) and 27 specialty stores[30].

[25] Source: Hill PDA survey May 2015
[26] PCA Shopping Centre Directory 2020
[27] PCA Shopping Centre Directory 2020
[28] PCA Shopping Centre Directory 2020; Shopping Centre News Little Guns 2021 –the latest reported MAT levels that could be sourced for Fairfield
[29] Source: Hill PDA survey May 2015
[30] Source: Property Council of Australia NSW/ACT Shopping Centre Directory 2018

HillPDA's Holroyd Retail Centre Strategy (2008 Strategy) noted that Greystanes had a large trade area extending as far south as Smithfield and Woodpark as far north as the Great Western Highway. The centre achieved total retail sales of $67.24 million in 2021/22. RTD was $12,748/sqm, 39% above the median for centres below 20,000sqm in size[31]. The strong performance of the village centre indicates that it is attracting sales and potentially diverting customers from other local shops in Greystanes and the surrounding areas.

2.2.11 Toongabbie Small Village Centre

Toongabbie is divided by the main western railway line, with the retail core provided along Aurelia Street and surrounding the Portico Plaza Shopping Centre along Portico Parade and Cornelia Road. Portico Plaza provides 7,895sqm of occupied retail and commercial floorspace[32] including a Woolworths supermarket (2,589sqm). A further 5,000sqm of shopfront floorspace is provided Aurelia and the surrounding streets.

2.2.12 Pendle Hill Small Village Centre

Pendle Hill provides a further 5,000sqm of shop front retail floorspace. Shopfront retail and commercial floorspace is concentrated along Civic Avenue, Joyce Street and Pendle Way north of Gilbra Road. Pendle Hill was noted in the 2008 Strategy as performing a localised shopping role with a high degree of expenditure leakage from its trade area to other centres nearby, particularly North Wentworthville (Wentworthville). Since the 2008 Strategy, Woolworths has refurbished and occupied the former Flemmings store at 109 Pendle Way (circa 700sqm) and is thereby likely to be drawing back some of this expenditure leakage.

2.2.13 Neighbourhood centres

There are a number of small neighbourhood centres within the Cumberland LGA. The smaller nature of these centres implies no direct competition with smaller shop clusters, rather these smaller centres provide convenience related retail services to local surrounding residents.

2.2.14 Employment precincts

Cumberland LGA is home to a range of commercial centres that cater to a variety of needs. Merrylands is Cumberland LGA's largest centre and provides higher order retail and commercial services, with Auburn, Granville, Lidcombe and Wentworthville also identified as key commercial centres. These centres are supported by a mix of higher order commercial and retail services, and community facilities and will continue to absorb some of the demand for commercial office floorspace.

The Cumberland Employment and Innovation Lands Strategy (the Strategy) also identifies precincts and focus areas of these precincts to support jobs and economic development in the area, with relevant extracts detailing the key focus areas of Strategy by Precinct shown in the below extracts.

[31] Source: SCN Mini-Guns 2022
[32] PCA Shopping Centre Directory 2020

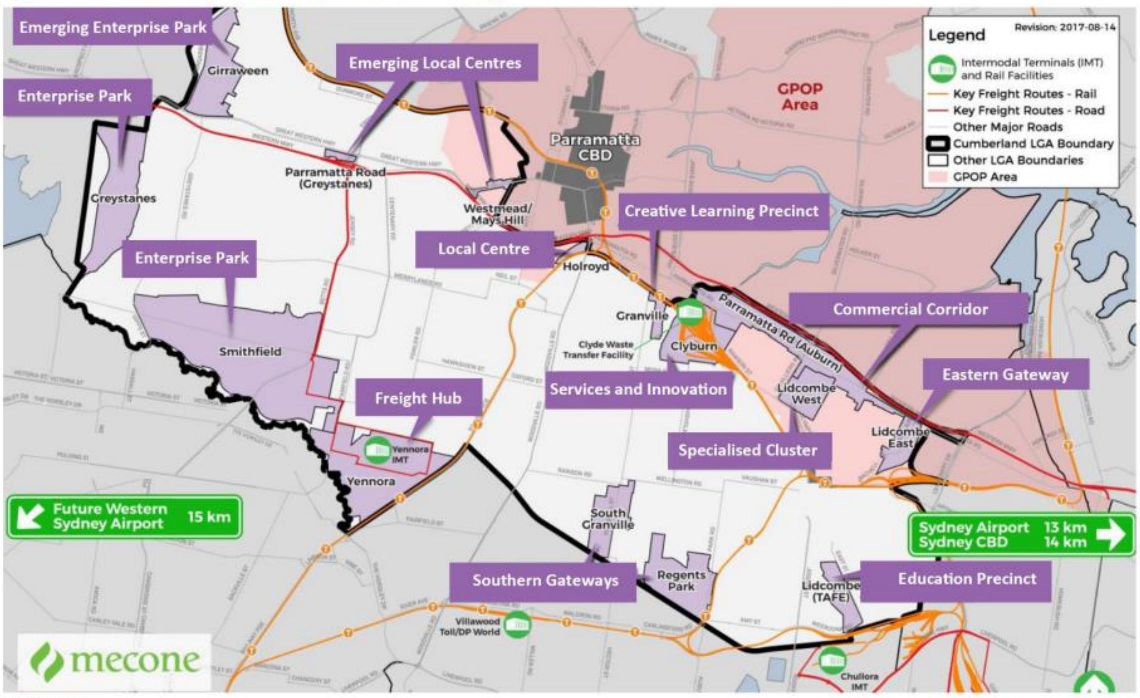
Figure 4: Extract from Cumberland Employment and Innovation Lands Strategy

Table ES.1: Key Focus Areas of Strategy by Precinct

Precinct	Name	Strategic Focus
1	Education Precinct	Education facilities and supporting services aligned with current and emerging industries in the region
2	Specialised Cluster	Potential for renewal including uses such as advanced knowledge and manufacturing, digital and creative industries (including food)
3	Services and Innovation	Maintain support service capability, e.g. train operations and support new service, research and innovation activities
4	Southern Gateways	Capitalise on strategic location for Sydney Metro south and southwest, retail and expand existing pharmaceutical industrial plus allied health, food/ beverage
5	Freight Hub	Promote strategic importance of this major hub, strengthen road and rail connections
6	Enterprise Parks	Established and emerging business parks building on existing industry specialisations and increasing digitisation of production
7	Emerging Local Centres	Smaller emerging centres supporting local growth, potential to target health, ancillary retail, food/ beverage as well as emerging sectors, e.g. artisan industries
8	Creative Learning Precinct	Focus on industry and business collaboration, and greater alignment of education sector to equip local population with new skills and innovation capacity
9	Commercial Corridor	Renewal with employment focus including advanced knowledge and creative industries, digital and advanced manufacturing
10	Eastern Gateway	Cluster of premium high-tech industrial units closely aligned with Commercial Corridor

Source: AEC

Figure ES.2: Cumberland Employment and Innovation Lands Strategy



Source: Mecone

Source: Cumberland Employment and Innovation Lands Strategy (2019)

The Strategy also identifies the following opportunities for Cumberland's employment and innovation lands to support innovation:

- Business and supply chain clusters: Regional-level business and supply chain clusters are present to support various sectors, including Advanced Manufacturing, Food & Beverage Manufacturing, and Freight & Logistics. These clusters are already established in Cumberland's lands, catering to specific sites and regions to enable efficient individual business supply chains, including Yennora, Smithfield and Greystanes.
- Research and development: Clusters for research and development are often triggered by the presence of universities, hospitals, or research organizations. In Lidcombe, there is an education

cluster consisting of Technical and Further Education (TAFE) institutions and the University of Sydney, albeit with limited capacity.

- Technology and creative industries: Non-traditional commercial spaces that offer retail amenities, easy pedestrian and transportation access, as well as unique and quirky spaces, are often favoured by creative industries for their operations. These industries tend to seek out environments that provide such support infrastructure for recreation and work.
- Artisan Industry: Cumberland's diverse population holds artisanal skills that could add to the uniqueness and appeal of the area. These skills may include designing clothing and jewellery, restoring furniture, making bread, curating ethnic spices and herbs, creating pottery and sculptures, and more. To promote the growth of an artisan community, affordable rent, a mix of workspace, storage, and display areas accessible to the public should be provided. It is ideal to locate these areas near existing centres to build synergies. Regents Park, Parramatta Road, and nearby areas like Lidcombe and Granville are identified as potential locations for cultivating an artisan community.

In addition to supporting commercial space in the local shop clusters to serve the needs of the local community such as medical services, accounting services, local legal services, real estate agents and other smaller pseudo-professional services, there may be opportunities for the 25 retail shop clusters to support and grow the above clusters. For instance there may opportunities for local shop cluster 14 (Wellington Road and 359-365 Clyde St, South Granville) to support and grow the technology and creative industry and/or artisan industry, whilst location shop cluster 25 (17 Brooks Circuit, Lidcombe) given its proximity to the TAFE institute could potentially support reach and development. Moreover, there are also opportunities for local shop clusters 6 (Fairfield Rd, Guildford West) and 7 (Fowler Rd, Guildford West) to provide retail amenity to support the nearby industrial precincts.

3.0 RETAIL DEMAND ANALYSIS

This Chapter undertakes an assessment of the amount of retail space that could be accommodated at each of the 25 local shop clusters based on demand generated predominantly by residents in the locality but also by workers and visitors.

3.1 Retail demand methodology

The method of assessing demand was to firstly identify the sources of trade for these local shop clusters, which can include residents, workers and/or visitors.

To forecast potential retail demand generated from residents, an appropriate trade area was derived for each centre based on the location of competing centres, travel times, urban settlement patterns and other criteria. Given the role of neighbourhood shops are to typically serve the local walkable catchment, the trade for each centre was defined to include a primary sector which includes the area within 400m walking distance of the local shop cluster and a secondary trade area which includes the area that extends a further 400m (walking distance) of the primary trade area. The primary and secondary trade areas are collectively known as the residential main trade area.

It is important to note that these shop clusters have the potential to attract customers from a broader catchment area due to their diverse retail offerings. However, the analysis presented below largely focuses on the local shop cluster's theoretical capacity to serve the walkable catchment area without disrupting the existing retail hierarchy. The analysis does, however, account for some additional trade from car-based retailers such as service stations, as well as visitors, workers and students.

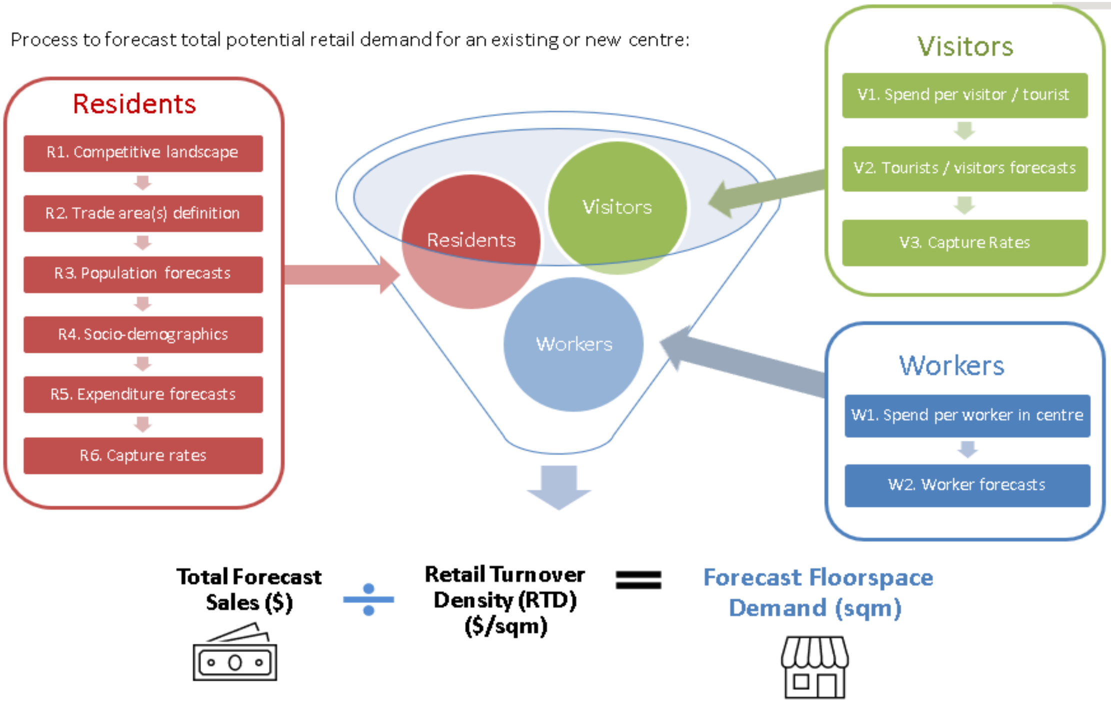
A similar process to that of the above is undertaken for those centres which have access to a substantial worker population within a walkable catchment.

HillPDA then utilised its in-house expenditure models (which takes into account socio-demographics of the catchment, real growth in expenditure, population growth, potential capture rates and benchmark retail turnover densities) to forecast the quantum of retail floorspace that could be accommodated in the centre in five-year increments from 2022 to 2041. The model also makes allowances for additional trade that may be captured from workers, visitors and other possible sources.

Please note that local shop cluster 3 (Louis Street, Granville) has a different profile compared to other shop clusters. It is anchored by a full-line supermarket and features more traditional retail offerings, resulting in a wider catchment area (i.e. beyond the walkable catchment) and a more frequent customer base. As a result, we have not analysed the demand generated from the local walkable catchment for this particular cluster.

The process of forecasting total potential retail demand is shown in the below figure.

Figure 5: Forecasting retail demand methodology



Source: HillPDA

3.2 Residential MTA population projections

The following population projections for each of these local shop clusters MTA have been sourced from:

- The ABS 2021 Census
- Transport of NSW population projections.

The MTA population projections are shown in the table below:

Table 3: Population projections by local shop cluster main trade area

Centre	2022	2026	2031	2036	2041
1: Burnett St	8,207	8,533	8,957	9,403	9,871
2: Hilltop Rd	6,495	6,761	7,110	7,476	7,862
4: 12 Dellwood St	6,759	7,052	7,435	7,840	8,266
5: Irrigation Rd, South Wentworthville	5,282	5,463	5,697	5,942	6,197
6: Fairfield Rd, Guildford West	4,127	4,193	4,276	4,361	4,448
7: Fowler Rd, Guildford West	6,496	6,727	7,027	7,341	7,668
8: Woodpark Shopping Centre	3,432	3,485	3,553	3,622	3,693
9: Coleman St, Merrylands	5,686	5,855	6,072	6,297	6,531
10: Old Prospect Rd, South Wentworthville	5,675	5,837	6,045	6,262	6,486
11: 1 Guildford Rd, South Granville	7,162	7,405	7,719	8,047	8,389
12: 165 Clyde St, South Granville	6,403	6,573	6,792	7,018	7,252
13: 52-56 Excelsior St, Merrylands	7,610	7,702	7,819	7,937	8,057
14: 359-365 Clyde St, South Granville	2,971	3,081	3,225	3,375	3,533
15: Rawson Rd, Guildford	4,680	4,804	4,964	5,129	5,300
16: 234-238 Cumberland Rd, Auburn	8,156	8,151	8,145	8,139	8,133
17: Bathurst St Shops, Greystanes	4,074	4,141	4,225	4,311	4,399
18: Damien Ave Shops	3,968	4,058	4,174	4,293	4,416
19: Maple St shops	4,209	4,288	4,389	4,491	4,596
20: Carnation St, Greystanes	2,396	2,437	2,490	2,544	2,598
21: Hawksview St, Guildford	8,233	8,413	8,643	8,880	9,123
22: 291-295 Clyde St, South Granville	5,325	5,486	5,695	5,911	6,136
23: 174-178 Excelsior St, Guildford	7,064	7,181	7,330	7,481	7,636
24: 271-277 Excelsior St, Guildford	6,242	6,372	6,538	6,709	6,884
25: 17 Brooks Circuit, Lidcombe	2,318	2,348	2,387	2,427	2,467

Source: ABS Census 2021 and Transport of NSW

Note given there is considerable overlap between the walkable catchments the population levels cannot be summed to derive a total walkable catchment population for all centres

3.3 Resident expenditure

This section examines the projected growth in household expenditure on retail goods and services between 2022 and 2041. Household expenditure was sourced from:

- ABS Retail Turnover data which provides total turnover every month by State and by industry sub-groups across Australia
- ABS Household Expenditure Survey which provides household expenditure by broad commodity type by household income quintile; and
- HillPDA's bespoke retail expenditure model which is generated by combining and data from the Census and the ABS Household Expenditure Survey (HES).

The table below presents a forecast of the total household expenditure derived from each local trade area. Figures are expressed in constant 2022 dollars and forecast inflation is ignored.

Table 4: Total expenditure on retail goods and services by trade area ($m)

Centre	2022	2026	2031	2036	2041
1: Burnett St	89.2	95.5	104.1	113.4	123.6
2: Hilltop Rd	70.6	75.7	82.6	90.2	98.4
4: 12 Dellwood St	63.5	68.3	74.7	81.8	89.5
5: Irrigation Rd, South Wentworthville	62.0	66.1	71.5	77.4	83.8
6: Fairfield Rd, Guildford West	45.0	47.2	49.9	52.9	56.0
7: Fowler Rd, Guildford West	70.9	75.7	82.0	89.0	96.5
8: Woodpark Shopping Centre	36.3	38.0	40.2	42.5	45.0
9: Coleman St, Merrylands	61.8	65.5	70.5	76.0	81.8
10: Old Prospect Rd, South Wentworthville	66.6	70.6	75.9	81.6	87.7
11: 1 Guildford Rd, South Granville	67.3	71.7	77.6	83.9	90.8
12: 165 Clyde St, South Granville	60.2	63.6	68.2	73.2	78.5
13: 52-56 Excelsior St, Merrylands	82.7	86.2	90.8	95.7	100.9
14: 359-365 Clyde St, South Granville	27.9	29.8	32.4	35.2	38.3
15: Rawson Rd, Guildford	47.2	50.0	53.6	57.5	61.7
16: 234-238 Cumberland Rd, Auburn	77.2	79.5	82.5	85.6	88.8
17: Bathurst St Shops, Greystanes	50.6	53.0	56.1	59.4	63.0
18: Damien Ave Shops	49.3	51.9	55.5	59.2	63.2
19: Maple St shops	52.3	54.9	58.3	61.9	65.8
20: Carnation St, Greystanes	29.8	31.2	33.1	35.1	37.2
21: Hawksview St, Guildford	83.1	87.5	93.3	99.5	106.1
22: 291-295 Clyde St, South Granville	60.6	64.4	69.3	74.7	80.5
23: 174-178 Excelsior St, Guildford	71.3	74.7	79.1	83.8	88.8
24: 271-277 Excelsior St, Guildford	63.0	66.3	70.6	75.2	80.1
25: 17 Brooks Circuit, Lidcombe	26.8	28.0	29.5	31.1	32.9

Source: ABS Census 2021 and Transport of NSW

3.4 Potential residential expenditure captured

The section above identified the total volume of retail expenditure from residents in the MTA for each local shop cluster. Only a small proportion of this expenditure is typically captured by retailers in neighbourhood centres such as the identified local shop clusters due to their limited retail offer. Residents undertake a large proportion of their food and grocery shopping at larger local centres that include a full-line supermarket such as such Greystanes. Residents also do most of their discretionary and leisure shopping in department stores, apparel stores and bulky goods stores in higher order regional centres such as Merrylands and Parramatta and along Parramatta Road in Auburn and Lidcombe.

It should also be noted that In Cumberland LGA, the shopping habits of the local population, particularly those from migrant backgrounds, may differ from other locations and LGAs with a lower proportion of migrants. Several factors influence these shopping habits, as highlighted by various sources[33] including:

- Firstly, the availability and affordability of products and services that meet the specific needs and preferences of different cultural communities play a significant role. This includes items such as halal

[33] Sources: Institute of Family Studies as accessed on aifs.gov.au; ABS 2021 Census Cumberland City; Australian Federation of Islamic Councils as accessed on afic.com.au; Aikaterini I. Vassilikopoulou and George J. Siomkos (2006) "The effects of micro-cultural differences on consumer behaviour: The case of differences in the buying behaviours of Christian and Muslim consumers" Int. J. Management Practice, Vol. 2, No. 2, 2006; Yudi Ahmad Faisal. (2019) Fatwa Shopping as modernising Islamic finance law

food, ethnic clothing, religious items, and other culturally specific products. Cumberland LGA, with its diverse population, tends to have a higher concentration of local businesses and organizations that offer halal and products and services, catering to the needs of the community.

- Secondly, the level of acculturation and adaptation to the Australian culture and lifestyle also influences shopping behaviour. Newly arrived immigrants may initially rely more on local shops that reflect their cultural backgrounds, providing a sense of familiarity and comfort. As they become more integrated into the wider society, their shopping habits may evolve accordingly.
- The strength of social networks and community support, including family, friends, neighbours, and ethnic groups, can influence shopping decisions. This can lead to a preference for shopping at local establishments that support the community and culture.
- Cultural and religious values have an impact on purchasing decisions. Muslim consumers (which are highly represented in the Cumberland LGA), for example, may prioritize ethical and halal products. Similarly, bread holds a special place in Middle Eastern, Arabic, Afghan, and Muslim cultures (also highly represented cultures in Cumberland LGAs), and its consumption is deeply rooted in traditions, religious festivals, and everyday meals. These cultural and religious values may result in a greater spend for local bakeries and specialty shops that provide various types of bread, ethical and halal products.

Overall, the influences outlined above suggest that Cumberland LGA, with its higher proportion of migrants, is likely to exhibit shopping habits that differ from other LGAs with a lower migrant population who have been become more accustomed to undertaking weekly shops at national supermarkets and the like.

Capture rates (i.e. the proportion of expenditure captured by the site) have been adopted, considering the above factors. These market share assumptions are as follows and are indicative of the amount of trade that could be captured from the residents in the MTA based on the nature and scale of the local shop cluster:

- 12% capture from primary sector
- 5% capture from the secondary trade area.

The rates applied for residents are aspirational rates, that is, the amount which could be captured and retained in the MTA if it were to sufficiently service the walkable community. Note the above market shares for each centre above are subsequently re-adjusted to reflect any overlap with the walkable trade areas of other nearby competing centres. This re-adjustment takes into consideration the strength and nature of these competing centres.

It should also be note that some of the shop clusters are possibly attracting a higher market share and a wider trade area than suggested above due to their current retail offering, strong customer loyalty, strong reputation of businesses and due to the cultural and religious values outlined above as well as other attributes. Likewise some centres may experience a weaker market share due to a poorer retail offer and property neglect. However for the purpose of the demand modelling and understanding theoretical capacity we have adopted the typical or average rates for neighbourhood centres.

Applying the above capture rates the below tables outlines the total capture of household expenditure for each of the local shop clusters.

Table 5: Potential sales from MTA ($m)

Centre	2022	2026	2031	2036	2041
1: Burnett St	4.1	4.4	4.8	5.2	5.7
2: Hilltop Rd	3.0	3.2	3.5	3.8	4.1
4: 12 Dellwood St	1.3	1.3	1.5	1.6	1.8
5: Irrigation Rd, South Wentworthville	2.8	3.0	3.2	3.5	3.8

6: Fairfield Rd, Guildford West	2.6	2.7	2.9	3.1	3.3
7: Fowler Rd, Guildford West	3.3	3.6	3.9	4.2	4.5
8: Woodpark Shopping Centre	3.1	3.3	3.5	3.7	3.9
9: Coleman St, Merrylands	2.9	3.0	3.3	3.5	3.8
10: Old Prospect Rd, South Wentworthville	2.4	2.6	2.8	3.0	3.2
11: 1 Guildford Rd, South Granville	1.1	1.2	1.3	1.4	1.5
12: 165 Clyde St, South Granville	2.1	2.2	2.4	2.5	2.7
13: 52-56 Excelsior St, Merrylands	3.0	3.2	3.3	3.5	3.7
14: 359-365 Clyde St, South Granville	0.5	0.5	0.5	0.6	0.6
15: Rawson Rd, Guildford	1.2	1.3	1.3	1.4	1.5
16: 234-238 Cumberland Rd, Auburn	4.1	4.2	4.4	4.5	4.7
17: Bathurst St Shops, Greystanes	2.9	3.0	3.2	3.4	3.6
18: Damien Ave Shops	2.4	2.5	2.6	2.8	3.0
19: Maple St shops	2.6	2.7	2.9	3.0	3.2
20: Carnation St, Greystanes	2.1	2.2	2.3	2.4	2.6
21: Hawksview St, Guildford	4.1	4.3	4.6	4.9	5.2
22: 291-295 Clyde St, South Granville	1.2	1.3	1.3	1.5	1.6
23: 174-178 Excelsior St, Guildford	2.0	2.1	2.2	2.4	2.5
24: 271-277 Excelsior St, Guildford	1.8	1.9	2.1	2.2	2.3
25: 17 Brooks Circuit, Lidcombe	2.2	2.3	2.4	2.6	2.7

Source: HillPDA Research * Note Local shop cluster 3, which includes a full-line supermarket and serves a significantly wider trade with varied market shares has been excluded.

3.5 Additional expenditure from workers

The local shop clusters outlined in the table below were also identified has having potential to attract trade from workers. The projected employment population for each centre as sourced from Transport of NSW is also included in the table below.

Table 6: Worker population projections for identified local shop clusters

Centre	2022	2026	2031	2036	2041
6: Fairfield Rd, Guildford West	2,859	3,058	3,246	3,438	3,633
7: Fowler Rd, Guildford West	3,700	3,720	3,877	4,098	4,335
8: Woodpark Shopping Centre	800	900	950	1000	1050
14: 359-365 Clyde St, South Granville	2,112	2,182	2,331	2,467	2,603
25: 17 Brooks Circuit, Lidcombe	1,465	1,556	1,544	1,648	1,795

Source: Transport of NSW employment projections 2023

Workers typically spend a proportion of their total spend close to their place of work. Assuming an average spend of $2,500 per annum per worker[34] total retail sales from non-resident workers generally within 1-1.5km of the local shop cluster the table below outlines the potential spend from workers.

[34] An Urbis study found workers in the CBD spend $11,000 per annum in the CBD of which 33% was in food services (https://insideretail.com.au/news/office-workers-big-spenders-201407), accounting for growth in retail spend to 2022, the offer and location we have taken a conservative assumption of $2,500 per worker.

Table 7: Expenditure from local workers for identified local shop clusters ($m)

Centre	2022	2026	2031	2036	2041
6: Fairfield Rd, Guildford West	$2.4	$2.5	$2.7	$2.8	$3.0
7: Fowler Rd, Guildford West	$2.3	$2.3	$2.4	$2.6	$2.7
8: Woodpark Shopping Centre	$0.5	$0.6	$0.6	$0.6	$0.7
14: 359-365 Clyde St, South Granville	$1.7	$1.8	$1.9	$2.0	$2.1
25: 17 Brooks Circuit, Lidcombe	$1.2	$1.3	$1.3	$1.4	$1.5

Source: HillPDA research

3.6 Total expenditure from all sources

Table 8: Total potential sales in each centre ($m)

Centre	2022	2026	2031	2036	2041	Additional expenditure assumptions
1: Burnett St	5.0	5.4	5.9	6.4	7.0	Allows for additional 12.5% of expenditure from beyond trade area and 10% for trade generated from service station
2: Hilltop Rd	3.3	3.6	3.9	4.3	4.6	Allows for additional 12.5% of expenditure from beyond trade area
4: 12 Dellwood St	1.4	1.5	1.6	1.8	1.9	Allows for additional 10% of expenditure from beyond trade area
5: Irrigation Rd, South Wentworthville	3.1	3.3	3.5	3.8	4.1	Allows for additional 10% of expenditure from beyond trade area
6: Fairfield Rd, Guildford West	5.2	5.5	5.9	6.2	6.6	Allows for additional 10% of expenditure from beyond trade area
7: Fowler Rd, Guildford West	6.3	6.6	7.0	7.6	8.1	Allows for additional 10% of expenditure from beyond trade area and 10% for trade generated from service station
8: Woodpark Shopping Centre	3.6	3.8	4.1	4.3	4.5	Due to its location and lack of exposure to passing motorists, the trade from beyond is more limited
9: Coleman St, Merrylands	3.1	3.3	3.6	3.9	4.2	Allows for additional 10% of expenditure from beyond trade area
10: Old Prospect Rd, South Wentworthville	2.8	3.0	3.2	3.4	3.7	Allows for additional 15% of expenditure from beyond trade area
11: 1 Guildford Rd, South Granville	1.5	1.6	1.7	1.8	2.0	Allows for additional 10% of expenditure from beyond trade area; 10% for trade generated from service station: and 10% from students/parent of students of Blaxcell St Public School
12: 165 Clyde St, South Granville	2.5	2.7	2.8	3.1	3.3	Allows for additional 10% of expenditure from beyond trade area and 10% for trade generated from service station
13: 52-56 Excelsior St, Merrylands	3.3	3.5	3.7	3.8	4.1	Allows for additional 10% of expenditure from beyond trade area
14: 359-365 Clyde St, South Granville	2.3	2.3	2.5	2.7	2.8	Allows for additional 10% of expenditure from beyond trade area
15: Rawson Rd, Guildford	1.3	1.4	1.5	1.6	1.7	Allows for additional 10% of expenditure from beyond trade area

16: 234-238 Cumberland Rd, Auburn	4.9	5.0	5.2	5.4	5.6	Allows for additional 10% of expenditure from beyond trade area and 10% for trade generated from service station
17: Bathurst St Shops, Greystanes	3.5	3.6	3.9	4.1	4.3	Allows for additional 10% of expenditure from beyond trade area and 10% from students/parent of students of Greystanes High School
18: Damien Ave Shops	2.4	2.5	2.6	2.8	3.0	Due to its location and lack of exposure to passing motorists, the trade from beyond is more limited
19: Maple St shops	2.6	2.7	2.9	3.0	3.2	Due to its location and lack of exposure to passing motorists, the trade from beyond is more limited
20: Carnation St, Greystanes	2.1	2.2	2.3	2.4	2.6	Due to its location and lack of exposure to passing motorists, the trade from beyond is more limited
21: Hawksview St, Guildford	4.7	4.9	5.3	5.6	6.0	Allows for additional 10% of expenditure from beyond trade area and 5% from visitors of Holroyd Private Hospital
22: 291-295 Clyde St, South Granville	1.3	1.4	1.5	1.6	1.7	Allows for additional 10% of expenditure from beyond trade area
23: 174-178 Excelsior St, Guildford	2.2	2.3	2.4	2.6	2.7	Allows for additional 10% of expenditure from beyond trade area
24: 271-277 Excelsior St, Guildford	2.1	2.2	2.4	2.5	2.7	Allows for additional 10% of expenditure from beyond trade area and 10% from students of Granville South Creative and Performing Arts High School
25: 17 Brooks Circuit, Lidcombe	3.4	3.6	3.7	3.9	4.2	Due to its location and lack of exposure to passing motorists, the trade from beyond is more limited

Source: HillPDA Research * Note Local shop cluster 3, which includes a full-line supermarket and serves a significantly wider trade area with varied market shares was excluded in this analysis.

As mentioned previously, the total potential sales in the above table are not forecast sales but rather target sales based on the current and future competitive retail landscape and sources of expenditure in walkable catchments around these local shop clusters. Actual sales may vary as a result of the tenants and other attributes. Actual sales could be higher as we are aware that some tenants develop a strong reputation and can attract customers from a wider area and for other reasons outlined above. Similarly, in other centres actual sales may be lower than indicated in the above table due to a poor retail offer, property neglect and other possible reasons.

3.7 Demand for shop front space

Demand for shop front space is calculated by dividing potential retail sales by industry target retail turnover density levels (RTD) measured in dollars per square metre ($/sqm). Target RTDs are sourced from a number of sources including ABS Retail Sales, ABS Retail Survey 1998-99, Shopping Centre News, Urbis Retail Averages, Property Council of Australia and various annual reports and other consultancy studies. For the purpose of this assessment we have adopted an RTD of $5,500/sqm. This is considerably lower than shopping centres with full line supermarkets (generally around $10,000/sqm) but reflects the lower performance of neighbourhood centres. The results are shown in the table immediately below.

Table 9: Floorspace demand across each local shop cluster (sqm)

Centre	2022	2026	2031	2036	2041	Growth 2022-41 (sqm)
1: Burnett St	912	958	1,018	1,082	1,150	1,289
2: Hilltop Rd	605	637	678	722	768	2,604
4: 12 Dellwood St	251	264	282	301	321	1,351
5: Irrigation Rd, South Wentworthville	556	581	613	648	684	357
6: Fairfield Rd, Guildford West	952	987	1,020	1,054	1,087	1,256
7: Fowler Rd, Guildford West	1,147	1,174	1,225	1,284	1,347	1,218
8: Woodpark Shopping Centre	661	685	707	729	752	951
9: Coleman St, Merrylands	570	593	622	654	686	185
10: Old Prospect Rd, South Wentworthville	510	530	556	583	611	1,628
11: 1 Guildford Rd, South Granville	271	283	299	316	333	1,553
12: 165 Clyde St, South Granville	456	473	495	517	541	1,616
13: 52-56 Excelsior St, Merrylands	604	618	635	653	671	239
14: 359-365 Clyde St, South Granville	410	418	438	455	471	2,744
15: Rawson Rd, Guildford	237	246	257	269	282	192
16: 234-238 Cumberland Rd, Auburn	891	899	910	921	931	870
17: Bathurst St Shops, Greystanes	633	650	671	693	716	992
18: Damien Ave Shops	428	442	460	479	499	100
19: Maple St shops	468	481	499	517	535	450
20: Carnation St, Greystanes	373	384	397	410	424	460
21: Hawksview St, Guildford	851	878	913	950	988	269
22: 291-295 Clyde St, South Granville	236	246	258	271	285	707
23: 174-178 Excelsior St, Guildford	401	412	426	440	454	694
24: 271-277 Excelsior St, Guildford	402	414	430	447	464	620
25: 17 Brooks Circuit, Lidcombe	622	640	645	667	694	1,800

Source: HillPDA Research *Allows for 0.5% growth per annum in Target RTD Note Local shop cluster 3, which includes a full-line supermarket and serves a significantly wider trade with varied market shares has been excluded.

Subtracting the supply of floor space from demand derives the level of over or undersupply of floor space as shown in the table and figure immediately below.

Table 10: Shopfront demand vs existing shopfront space supply in each local shop cluster (sqm)*

Centre	Demand		Supply	Under/oversupply of shopfront space***	
	2022	2041	2022	2022	2041****
1: Burnett St	912	1,150	1,155	243	5
2: Hilltop Rd	605	768	1,636	1,031	868
4: 12 Dellwood St	251	321	561	310	240
5: Irrigation Rd, South Wentworthville	556	684	357	-199	-327
6: Fairfield Rd, Guildford West	952	1,087	943	-9	-144
7: Fowler Rd, Guildford West	1,147	1,347	1,154	7	-193
8: Woodpark Shopping Centre	661	752	791	130	39
9: Coleman St, Merrylands	570	686	185	-385	-501
10: Old Prospect Rd, South Wentworthville	510	611	1,005	495	394
11: 1 Guildford Rd, South Granville	271	333	1,196	925	863
12: 165 Clyde St, South Granville	456	541	802	346	261
13: 52-56 Excelsior St, Merrylands	604	671	192	-412	-479
14: 359-365 Clyde St, South Granville	410	471	0	-410	-471
15: Rawson Rd, Guildford	237	282	192	-45	-90
16: 234-238 Cumberland Rd, Auburn**	891	931	178	-713	-753
17: Bathurst St Shops, Greystanes	633	716	992	359	276
18: Damien Ave Shops	428	499	50	-378	-449
19: Maple St shops	468	535	273	-195	-262
20: Carnation St, Greystanes	373	424	277	-96	-147
21: Hawksview St, Guildford	851	988	269	-582	-719
22: 291-295 Clyde St, South Granville	236	285	342	106	57
23: 174-178 Excelsior St, Guildford	401	454	694	293	240
24: 271-277 Excelsior St, Guildford	402	464	620	218	156
25: 17 Brooks Circuit, Lidcombe	622	694	1,800	1,178	1,106
TOTAL	**13,448**	**15,698**	**15,664**	**2,216**	**-34**
Total vacant shopfront floorspace			**2,670**		

* Includes current occupied retail floorspace and vacant shopfront floorspace; excludes industrial, commercial and other non-shopfront uses

Allows for 0.5% growth per annum in Target RTD

Note Local shop cluster 3, which includes a full-line supermarket and serves a significantly wider trade with varied market shares has been excluded.

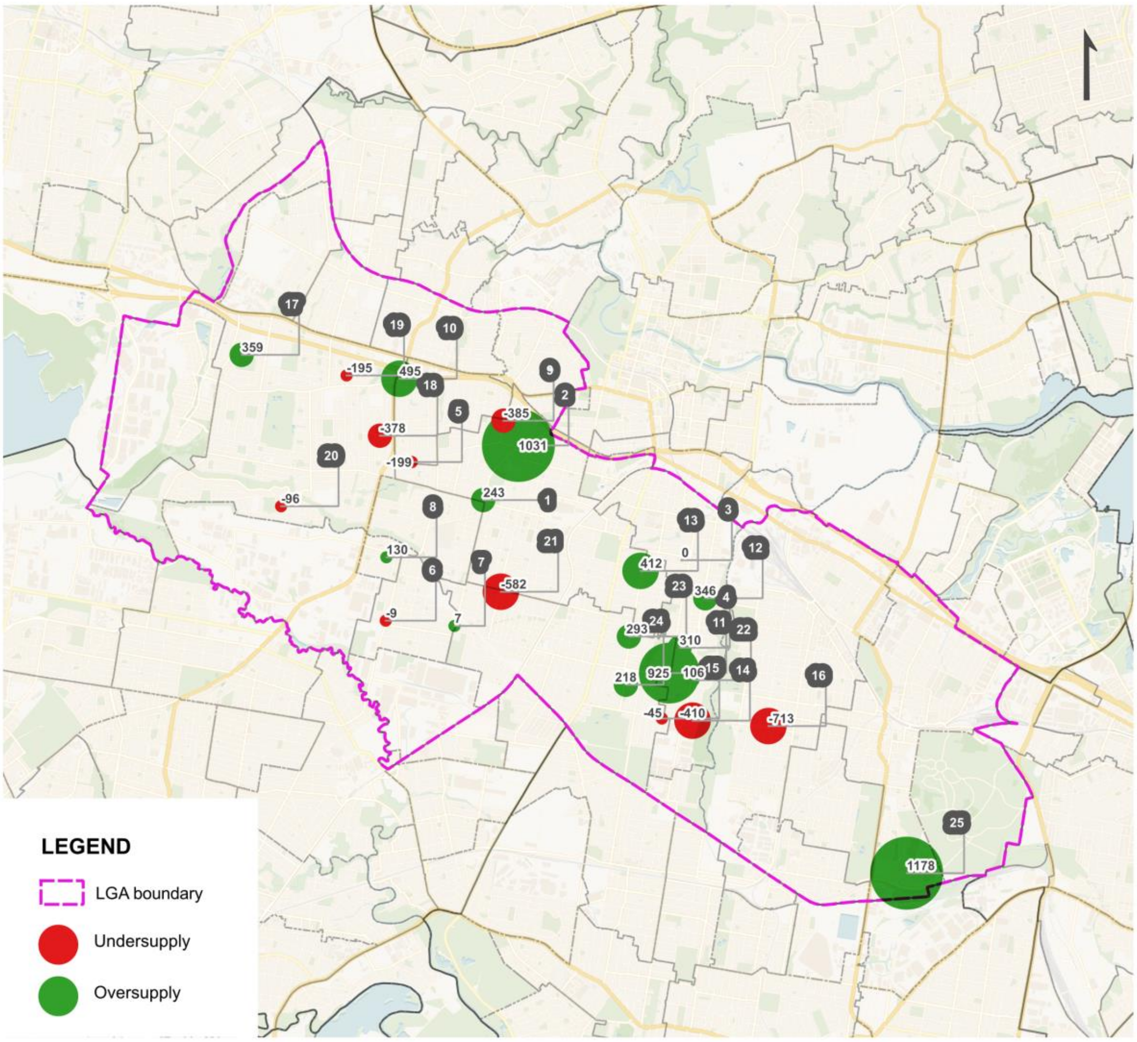
**Excludes the vacant industrial building

***Green text denotes an oversupply of retail floorspace, while red denotes an undersupply of retail floorspace

**** Assuming that the amount of occupied retail and vacant floorspace in 2022 remains constant to 2041

While the table immediately above suggests that there is an oversupply of floorspace in the 24 centres currently (Local shop cluster with the full-line Woolworths supermarket excluded) there is almost 2,700sqm of vacant floor space in the supply figures. Removing these suggests a more equilibrium state (with a slight undersupply).

Figure 6: Shopfront demand as at 2022 vs existing shopfront space supply across each local shop cluster



Source: QGIS, HillPDA

4.0 CLASSIFICATION AND SWOT ANALYSIS

This chapter undertakes a high level SWOT analysis of each of the local shop clusters and develops a local shop classification.

4.1 SWOT analysis

This section provides a high level SWOT analysis of the 25 local shop clusters.

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
1: Burnett St, Merrylands	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Good convenience offer • Many of the businesses appear to be performing well, including the beautician and butcher. These businesses have established themselves as key providers of essential services to the community. The butcher, in particular, serves as a local supplier for other nearby businesses, further contributing to the local economy and supporting the overall growth of the cluster. • Opposite recreational uses • Benefits from critical mass and large clusters of B1 zone sites, with opportunities for centre expansion • Demand and supply generally at equilibrium	• Strong competition from higher order centre (Merrylands West) within walking distance • High speeds and traffic congestion impacts pedestrianisation and function of local shop cluster	• Opportunities to expand towards less congested Ruth Street • Opportunities to improve/ expand food and beverage offer • Opportunities to redevelop vacant properties at 387-389 Merrylands Rd (within B1 cluster), which provide 1,416sqm of B1 zoned land • Opportunity to install smart cities infrastructure to enhance the public domain	• Surrounding centres continue to draw trade from this shop cluster and vice-versa

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
2: Hilltop Rd, Merrylands	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Diverse range of convenience offerings, catering to various needs and preferences • Benefits from critical mass, with opportunities for the centre expand	• Irregular shaped B1 zoned clusters, segregated by busy roads which impacts pedestrian flow • Limited street parking which contributes to traffic congestion • No right-hand turn from Burnett and Hilltop Streets also impacts traffic flow/ accessibility • Competition from higher order centre Stockland Merrylands (1.5km) and other local shops • Elongated along Hilltop Road • Oversupply of shopfront floorspace • The area has been identified as accident-prone for cars	• Opportunities to redevelop the car-wash site – potential for mixed use development to drive demand • Improve pedestrian connection (e.g. pedestrian crossings) • Opportunity to install smart cities infrastructure to enhance the public domain • Given the cluster benefits from a strong food and beverage offer, there are opportunities to enhance the outdoor eating experience through improving the public domain • Opportunities to target apparel and non-food retailers to support its function as a high street (this can be supported by high quality shop fit-outs)	• Surrounding centres continue to draw trade from this shop cluster and vice-versa • Carwash site is to some extent removed from the other B1 clusters and there is a risk redevelopment of this site to include convenience retailing beyond the current offering (i.e. an ancillary coffee shop to the carwash) will redirect trade from existing retailers at this local shop cluster. • Risk that additional floorspace will further exacerbate the oversupply

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
3: 6 Louis St, Granville	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Strong convenience offer • Benefits from critical mass, with opportunities for the centre expand	• Competition from Granville Station retail offer (1km) • Existing petrol station at local shop cluster attracts significant trade from afar and contributes to traffic congestion • Primary retail activity occurs at Arida Centre and petrol station, with other retailers on the fringe appearing to trade more mundanely • High speed and volumes of traffic – which impacts pedestrianisation • Blaxcell Road is a busy thoroughfare connecting Woodville Road, Granville, Clyde Street, and Mona Street, facilitating travel to Auburn and other areas. Existing speed mitigation measures, including roundabouts, have been implemented to manage traffic flow. However, reducing speeds further without causing congestion is challenging due to high traffic volume and speed	• Smaller allotments surround the Arida Centre along Blaxcell Street presenting strong opportunity for development and or improved connection to centre – the latter can also create opportunities for existing retailers to capture additional trade from Woolworths customers • Opportunities to redevelop vacant property at 95-99 Blaxcell St, Granville (within B1 cluster), which provide 917sqm of B1 zoned land • Opportunities to target personal services and commercial services (currently underprovided)	• Surrounding centres continue to draw trade from this shop cluster and vice-versa – particularly the latter in this case

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
4: 12 Dellwood St, South Granville	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Well loved shops • Rear lane conducive to receiving and making deliveries • Strong public domain and amenity, including a large public park with a playground located directly across from the shops • Benefits from good accessibility and public transport links • Strong convenience offer • Benefits from critical mass, with opportunities for the centre expand • Heritage assets (in part)	• Competition from a number of other local shop clusters within 1.5km • Supply of floorspace remains above demand	• Opportunities to expand and improve the food and beverage and personal service offer	• Surrounding centres continue to draw trade from this cluster and vice-versa • Given proximity of local shop clusters, there is a risk of retail redundancy and oversupply
5: Irrigation Rd, South Wentworthville	• Adequate walking catchment • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Outdoor dining facilities • Benefits from designated parking • Supply of floorspace is generally in equilibrium with demand	• Strong competition from higher order centre (Merrylands West) within walking distance • Lacks critical mass and B1zoned clusters • Poor public domain • inadequate lighting during evenings, which may negatively impact visibility and safety. • shops tend to close early, limiting the availability of services and convenience for the community	• Opportunities to improve public domain	• Surrounding centres continue to draw trade from this cluster

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
6: Fairfield Rd, Guildford West	• Close proximity to Smithfield Industrial Precinct and commercial premises along Fairfield Rd, with opportunities to attract workers from precincts • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Good convenience-based offer, including veterinary hospital which is likely to draw a much wider trade area • Dedicated parking (which caters for workers undertaking a top-up shop on their drive home from work) • Supply of floorspace is generally in equilibrium with demand • Shops within the cluster also specifically cater to the socio-ethnic character of the local community	• Limited residential catchment, acting primary as a stopover destination from other locations	• Opportunities to target food and beverage tenants to cater to worker catchment and visitors of veterinary hospital – offer will have to differ from that currently provided in the surrounding area • Opportunities to target retailers / commercial tenants that complement the veterinary hospital (pet salon)	•The local shop cluster faces competition from surrounding centres, such as Crown On McCredie, as well as industrial cafes and lunch shops located in the surrounding warehouse complexes which may pose a risk to expanding its food and beverage offer.
7: Fowler Rd, Guildford West	• Substantial walking catchment population and population growth • Opportunities to attract workers from Yennora Industrial Precinct • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Close proximity to McCredie Park, swim centre, Guildford Leagues Club • Good convenience offer • Benefits from critical mass	• Busy intersection and poor public domain • Scarce parking • prone to accidents due to unfavourable traffic conditions.	• Opportunities to improve pedestrian links – including to the park and swim centre to leverage from the synergies of these two land uses • There are opportunities to improve the public domain and implement smart cities infrastructure to enhance the overall environment and services • Opportunities to deliver a mixed-use development and/or expand commercial offer (which can be encouraged through increased FSR and height controls), this in turn could drive demand for additional floorspace • Demand for retail floorspace is slightly above supply, suggesting there is market appetite for additional floorspace	• Risk associated with securing commercial tenant in this location • Redeveloping may not be feasible without residential component – risk of losing retail and office floorspace for mixed use developments and may impact the neighbourhood shop experience

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
8: Dell St, Smithfield (Woodpark Shopping Centre)	• Substantial walking catchment population and population growth • Pedestrian friendly and opposite Woodpark Reserve • Some (limited) potential to attract trade from workers from Smithfield Industrial Precinct • Rear lane conducive to receiving and making deliveries • Adequate critical mass, with a mix of businesses • Moderate public transport links • Supply of floorspace is generally in equilibrium with demand	• Potential limited development capacity due to fragmented ownership	• Opportunities to target specialty food and grocery and personal services to improve the convenience-based offer • Opportunities to deliver a mixed-use development (which can be encouraged through increased heights and FSR), this in turn could drive further demand	• Redeveloping may not be feasible without residential component – risk of losing retail and office floorspace for mixed use developments and may impact the neighbourhood shop experience
9: Coleman St, Merrylands	• Adequate walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Rear lane conducive to receiving and making deliveries • Good street activation • Serves as a meeting place for members of the community, especially on weekends	• Lacks critical mass, with a limited retail and commercial offer • Limited B1 zone cluster in terms of lot size • Competition from Hilltop St Shops (600m) • Inadequate parking • Surrounding streets are narrow, and parking on the main street can be dangerous at times due to the high volume of passing cars	• Lots currently underutilised, with opportunities to expand existing footprint and potentially B1 cluster • Demand for floorspace is above supply, suggesting there is market appetite for additional floorspace	• Surrounding centres continue to draw trade from this cluster

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
10: Old Prospect Rd, South Wentworthville	• Adequate walking catchment population and population growth • Benefits from good exposure to passing traffic along Jersey Road • Benefits from good accessibility and public transport links • Rear lane and parking for each group of buildings • The refurbishment of KFC within the cluster is expected to have positive effects on other tenants, as it will improve the cluster's overall attractiveness and appeal	• Oversupply of floorspace provision • Location is to some degree removed from residential population	• Centre is rundown in parts, with potential for upgrade • Potential to target commercial based tenants and uses given its location and accessibility • provides an alternative shopping option for residents of Greystanes, Wentworthville, and South Wentworthville communities	• Risk associated with securing commercial tenant in this location
11: 1 Guildford Rd, South Granville	• Substantial walking catchment population and projected growth • In close proximity to Blaxcell St Public School • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Good convenience offer • Benefits from critical mass and large clusters of B1 zone sites, with opportunities for the centre expand • Large corner B1 Cluster • Shops within the cluster also specifically cater to the socio-ethnic character of the local community	• In the vicinity of a number of other local shop clusters • Oversupply of floorspace provision	• Opportunities to target personal services	• Surrounding centres continue to draw trade from this cluster and vice-versa

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
12: Clyde/Mona Streets, South Granville	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Good convenience offer • Benefits from critical mass and large clusters of B1 zone sites • Activity is focused at the Mona and Clyde St	• Not pedestrian friendly • Clyde St is a very busy main road, with right hand turn onto Mona Street causing congestion • Oversupply of floorspace provision	• Opportunities to improve pedestrian links (e.g. pedestrian crossings) • Opportunities for further mixed-use developments (which can be encouraged through increased FSR and heights), this in turn could drive further demand	• Redeveloping may not be feasible without residential component – risk of losing retail and office floorspace for mixed use developments and may impact the neighbourhood shop experience
13: 52-56 Excelsior St, Merrylands	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Located at a roundabout intersection which helps to slow traffic and improve pedestrianisation • Opposite Coronation Park benefiting from good public amenity	• In the vicinity of a number of other local shop clusters • Lacks critical mass and B1 zoned cluster	• Demand for floorspace is above supply, suggesting there is market appetite for additional floorspace - with potential to extend the B1 zoned land or provide shoptop housing development further north • Opportunities to improve connectivity to park	• Surrounding centres continue to draw trade from this shop cluster and vice-versa • If shoptop housing was permitted further north, there is a risk of land banking
14: Rawson/ Clyde St South Granville	• Adjacent to Wellington Rd Business Park, with opportunity to attract trade from these workers • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Potential to attract trade from attendees of the Masjid Al Noor Mosque (currently under construction) • Large B1 cluster, with large land holdings	• Non-conforming uses on site (light industrial), with poor convenience based offer • The adjacent mixed-use development plans to incorporate retail uses on the ground floor, which will likely meet the anticipated future demand for retail in the area	• Potential to target commercial tenants and leverage from existing Business Park	• Existing building will need to be retrofitted to accommodate commercial tenants and there is a risk that redevelopment will not be financially feasible • The Wellington Rd Industrial complex offers a wide range of services to cater to the needs of the local community and reduces the need for redundant uses at this cluster

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
15: Rawson Rd, Guildford	• Adequate walking catchment population and population growth • Near Granville Industrial Precinct with opportunity to attract trade from these workers (note the existing retail near Wellington Business Park is better positioned to capture trade from these workers) • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Current provision of floorspace is in equilibrium with demand • Shops within the cluster also specifically cater to the socio-ethnic character of the local community	• Lacks critical mass and B1 zoned area • Limited offering • In the vicinity of a number of other local shop clusters • Poor public domain	• Public domain improvements • Opportunity to grow cluster through encouraging mixed use development or shop-top housing (which can be encouraged by increased FSR and height controls), which in turn may drive demand	• Redeveloping may not be feasible without residential component – risk of losing retail and office floorspace for mixed use developments and may impact the neighbourhood shop experience
16: 234-238 Cumberland Rd, Auburn	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • No strong competition	• Sparse street parking • Limited provision of occupied retail and commercial floorspace • Derelict site, with long-term vacant industrial building	• Opportunities to redevelop the vacant building – given EOI has lapsed increased FSR and height controls may incentivise developer • Demand for retail floorspace is above supply, suggesting there is market appetite for additional retail uses on site	• Redeveloping may not be feasible without residential component – risk of losing retail and office floorspace for mixed use developments and may impact the neighbourhood shop experience

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
17: Bathurst St Shops, Greystanes	• Potential to capture trade from visitors at Bathurst St Park and parents/students of Greystanes High School • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Current provision of floorspace is generally in equilibrium with demand • Adequate critical mass, with good provision of convenience based retailing and food and beverage options • More affluent demographic profile • Ample parking • Despite the proximity of Pemulwuy Marketplace (800m) and Greystanes Village Centre, there is limited competition observed between this cluster. The presence of Greystanes Road and Old Prospect Road creates distinct client bases. This cluster has a loyal local customer base, primarily focusing on convenience and specialty-based purchases, while larger shopping needs may be fulfilled in Greystanes or Pemulwuy.	• Competition from a number of other shopping villages in the Greystanes area including: Gozo Rd shops, Alpha Rd shops, Kippax St shops and Jonathon St shops – however each village within the area tends to offer a unique and specialized service and reduces direct competition among the shops and allows each shop cluster to establish its own unique identity and customer base. • Poor public domain	• Opportunities to improve pedestrian links between school and shops • Opportunities to improve public domain and linkages with park / recreational uses and capitalise on the synergies of these two land uses • Opportunities to target convenience store or speciality food retailer • Opportunity to install smart cities infrastructure to enhance the public domain	• Surrounding centres continue to draw trade from this centre and vice-versa • Community resistance to change

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
18: Damien Ave, Greystanes	• Benefits from good accessibility • Opposite park, good public domain • Pedestrian friendly environment, with low traffic volumes and speed owing to its residential location •The area is characterized by high affluence and a strong local focus, with many home-based businesses operating within the community which creates opportunities to attract these businesses to retail spaces • The presence of numerous childcare facilities and school-related activities in the vicinity provides the shop cluster with an opportunity to attract customers from a wider catchment area	• Lacks critical mass and B1 zoned land • In the vicinity of a number of other local shop clusters • Limited public transport movement around this part of Greystanes	• Opportunities to target convenience store / speciality food retailer and /or café • Demand for floorspace is above supply, suggesting there is market appetite for additional floorspace (i.e. up to 400sqm) – • To meet this demand potentially extend the B1 zone/ shoptop housing further west and incentivise redevelopment through increased FSR and height controls • There are opportunities to improve the public domain and implement smart cities infrastructure to enhance the overall environment and services	• Surrounding centres continue to draw trade from this centre and vice-versa • Limited catchment to support uses
19: Maple St, Greystanes	• Shops built into the slope of the park, providing strong amenity • Pedestrian friendly environment, with low traffic volumes and speed owing to its residential location • Site will benefit from future cycleway links, presenting opportunities to target cyclists • Current provision of floorspace is generally in equilibrium with demand	• Lacks critical mass, with limited offer • Limited walking residential catchment	• Opportunities to target food and beverage tenancies (with outdoor dining options) • Opportunities to incorporate community uses (community / scout hall) on site to create multipurpose trips and activate the area – this would rely on improved public transport links	• Sloped land can add significant cost to re-development options • Competition from nearby establishments such as AJ's Café on Old Prospect Road and vice versa

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
20: Carnation St, Greystanes	• Some potential to attract trade from visitors of Nemesia St Park and workers from Smithfield Industrial Precinct • Good public domain, with ample open space • Rear lane access • Competing facilities over 1.2km from cluster • Current provision of floorspace is generally in equilibrium with demand • Cluster is anchored by a veterinary clinic which would likely have a significantly wider catchment	• Lacks critical mass, with limited offer • Limited walking residential catchment	• Opportunities to target convenience-based retailers to support the needs of the local community as well as food and beverage tenancies • Older style shop, with opportunities to upgrade • Opportunity to install smart cities infrastructure to enhance the public domain	• Potential lack of financial incentives to upgrade stores
21: Hawksview St, Guildford	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Within close proximity to Holroyd Private Hospital, with opportunities to attract trade from Hospital visitors	• Limited parking • Busy intersection, with guard rails on each side – impacts pedestrianisation • Hawksview St is a busy road, with constrained vehicular access from this road	• Demand for floorspace is above supply, suggesting there is market appetite for additional floorspace (i.e. up to 900sqm) – potential to extend B1 zone further east and/or south and incentivise redevelopment through increased FSR and height • Opportunities to provide ancillary services to support the nearby Holroyd Private Hospital, including attracting specialist medical services through the provision of additional commercial spaces.	• Redeveloping adjacent sites may not be feasible without residential component – as such there is a risk that this option may lead to a loss of retail and office floorspace for mixed use developments and may impact the neighbourhood shop experience • Difficulties securing specialist medical services

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
22: 291-295 Clyde St, South Granville	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Benefits from a good mix of uses including community uses, which draws a wider catchment • Current provision of floorspace is generally in equilibrium with demand • Good linkages with Chiswick Park • Good pedestrian movement and business interest • Shops within the cluster also specifically cater to the socio-ethnic character of the local community	• Lacks critical mass and B1 zoned area • Limited offering • In the vicinity of a number of other local shop clusters	• Opportunities to target food and beverage tenancies	• Surrounding centres continue to draw trade from this shop cluster and vice-versa

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
23: 174-178 Excelsior St, Guildford	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Rear lane access • Benefits from good accessibility and public transport links • Opportunity to attract trade from students of the Granville South Creative and Performing Arts High School • Adequate critical mass, with good provision of convenience-based retailing to service community • Current provision of floorspace is generally in equilibrium with demand • Benefits from strong amenity, with a medical centre opposite the cluster along Adam St • Shops within the cluster also specifically cater to the socio-ethnic character of the local community	• In the vicinity of a number of other local shop clusters • Limited scope to expand due to fragmented ownership	• Opportunities to target personal service tenancies (e.g. hairdresser) • There is an opportunity to increase the density of the area by incorporating low-rise residential buildings, which would enhance the viability of this shop cluster	• Surrounding centres continue to draw trade from this shop cluster and vice-versa
24: 271-277 Excelsior St, Guildford	• Substantial walking catchment population and population growth • Benefits from good exposure to passing traffic • Benefits from good accessibility and public transport links • Adequate critical mass, with convenience based retailing to service community • Current provision of floorspace is generally in equilibrium with demand • Shops within the cluster also specifically cater to the socio-ethnic character of the local community	• In the vicinity of a number of other local shop clusters • Limited scope to expand due to fragmented ownership • Shop are dated and not attracting community interest	• Potential to extend the shop-top housing development across B1 zone and/or encourage mixed use development through increased FSR and heights to incentivise redevelopment of site - additional residential may drive and support retail and commercial uses on the ground floor	• Surrounding centres continue to draw trade from this centre and vice-versa • Redeveloping may not be feasible without residential component – as such there is a risk that this option may lead to a loss of retail and office floorspace for mixed use developments and may impact the neighbourhood shop experience

Local shop cluster	Strengths	Weaknesses	Opportunities	Threats
25: 17 Brooks Circuit, Lidcombe	• Little competition • Heritage asset • Opportunities to attract trade from workers of the Forensic Medicine and Coroner's Court, Lidcombe TAFE and Mary Wade Correctional Centre as well as students from the TAFE • Pedestrian friendly, with ample open space • Benefits from critical mass and large B1 zoned cluster • Affluent catchment, with higher propensity to spend • This cluster is highly supported by the local cultural community, making it a significant hub for the area.	• Limited walking catchment • Fringe location	• Opportunity for adaptive reuse of heritage assets • Opportunity to incorporate community uses to create multi-purpose trips • Opportunities to improve public transport links • If this cluster can provide a strong enough offer, it has the potential to attract trade from the Chester Hill community. • There are opportunities for this shop cluster to capitalize on nearby attractions and destinations, such as the asylum, Lidcombe State Hospital, Olympic media village, and Rookwood Cemetery which draw visitors from afar • Opportunity to install smart cities infrastructure to enhance the public domain	• Increased costs associated with redeveloping heritage assets • Risk of over-supplying the market at 1,800sqm (with demand analysis suggesting demand for around 700-1,000sqm) and long term vacancies • If the community makeup undergoes significant changes, there is a possibility that this cluster may lose local community support

4.2 Local shop cluster classification

A strategic approach has been undertaken to ensure the future success and vibrance of the 25 local shop clusters. This approach involves the classification of each local shop cluster, identifying their specific focus area or function to foster growth and enhance centre viability. Both the current and future state of each local shop cluster have been classified based on the attributes of each local shop cluster and the findings of the SWOT analysis.

Table 11: Local shop cluster classification

Name	Description
Destination local shops	Destination local shops refer to retail establishments that attract customers due to their unique products, services, or experiences. These shops often offer specialty items or services that are not widely available elsewhere and provide a distinct shopping experience that can also draw customers from beyond the immediate community. Examples of destination shops include high-end fashion boutiques and artisanal food shops Destination local shops can also differentiate themselves experience from competitors and increase customer base through integrating shops with

Name	Description
	or leveraging from nearby recreational and / or community uses to create a unique shopping experience or targeted experience for visitors of the recreational or community uses. For example a sporting goods store located adjacent to a sporting oval may attract users of the sporting oval looking to purchase gear and apparel. Destination shops are typically located in urban or suburban areas with easy access by car or public transportation, and they play an important role in driving local tourism and economic development in the surrounding area.
High street shops	High street shops are often situated along the main street or "high street" of the area, and they serve as a hub for shopping, dining, and entertainment. High street shops typically offer a mix of products and services, ranging from fashion and beauty to cafes and home goods. They are commonly frequented by both locals and tourists and contribute significantly to the local economy. High street shops are an integral part of urban and suburban communities, providing employment opportunities, supporting local businesses, and serving as a gathering place for residents and visitors alike.
Retail destination	Retail destination is a commercial hub located within a residential neighbourhood or community that serves as a convenient shopping destination for residents. It typically includes a mix of retail establishments, such as grocery stores, pharmacies, and small shops offering everyday essentials. These shops are designed to serve the immediate surrounding area, providing convenient access to goods and services without the need for extensive travel. Retail destinations play an important role in creating a sense of community and supporting local businesses, contributing to the overall well-being of the neighbourhood.
Convenience based shops	Convenience based shops refer to retail establishments that offer quick and convenient access to everyday goods and services, as well as providing eating out options. These shops typically carry a limited range of products, with a focus on items that are commonly needed for daily living, such as groceries, toiletries, and household items, whilst the café and restaurants provide opportunities for the local community to gather and enjoy a shared eating experience. Convenience-based shops are typically located in easily accessible locations and often offer extended hours of operation, allowing customers to make purchases or eat out at any time of day.
Service centre	A service station centre is a type of commercial development that combines a fuel station with other amenities such as convenience stores, fast-food restaurants, and car wash facilities. It is typically located along major highways or busy roads, making it easily accessible for motorists who need to refuel or take a break during their journey. The convenience stores and fast-food restaurants typically provide a range of quick and easy meal and snack options for drivers and passengers. Moreover, service station centres are designed to meet the needs of motorists who are on-the-go and in need of quick and convenient services while traveling.
Secondary commercial centre	Secondary commercial centres are designed to provide affordable office space to small and growing businesses that may not be able to afford traditional commercial office space in prime locations. They are often located in areas that are easily accessible by public transportation and offer ample parking for tenants and visitors. In addition to providing office space, these centres may also offer other services such as administrative support, IT services, and mail handling.

Name	Description
	Commercial centres for secondary office space provide an important opportunity for small and growing businesses to establish a professional presence and grow their operations. They also offer flexibility in terms of lease terms and space options, allowing businesses to adjust their office space as their needs change over time.
Specialised	Specialised shop or service is a type of retail establishment that focuses on providing specialised products or services to meet specific customer needs. These centres typically offer a wide range of specialised products or services that are not commonly found in regular retail stores. The key characteristic of a specialised service is its ability to cater to a niche market and deliver tailored products or services that meet the specific requirements and preferences of its target customers.
Ancillary	An ancillary shop refers to a retail establishment or business that operates in a supporting or supplementary role to a main or primary business. It is typically located within the same premises or in close proximity to the main business and offers additional products, services, or amenities that complement the main business's offerings. The purpose of an ancillary shop is to cater to the needs and preferences of customers who are already visiting the main business, providing them with supplementary options and convenience. This arrangement allows customers to fulfill additional needs or desires without having to travel to distant locations, thus enhancing customer satisfaction and potentially increasing revenue for both the main business and the ancillary shop.

The below table outlines the function of each centre, with consideration given to the local context, characteristics of the site and competition. A local shop cluster may demonstrate characteristics of more than one (1) classification.

Table 12: Local shop cluster function and classification

Local shop cluster	Classification		Strategic function or focus
	Current State	Future State	
1: Burnett St, Merrylands	Destination local shops / service centre	Remains	The local shop cluster in the vicinity of Merrylands Park and Swimming Centre has a unique opportunity to solidify its position as a destination for both the local community and visitors. With its close proximity to these recreational facilities, the cluster can cater to the needs of park-goers and swimmers by offering a range of food and beverage options. To maximize this potential, the implementation of planning policies that support outdoor dining can further enhance the dining experience. In addition to catering to visitors, the cluster should also continue providing convenience-based retail services to meet the day-to-day needs of the local community and ensure that residents have easy access to essential goods and services within their neighbourhood. This can include essential services such as grocery stores, butchers, and personal services (with most of these essential services already present). Furthermore, the presence of an established service station in the cluster adds an additional dimension, as it can serve the needs of passing motorists. This dual role as a local service hub and a destination for visitors creates a diverse customer base and opportunities for cross-promotion and increased foot traffic.

Local shop cluster	Classification		Strategic function or focus
	Current State	Future State	
2: Hilltop Rd, Merrylands	High street shops	Remains	The local shop in its current state, with its central location and elongated nature, functions as a high street. The presence of traffic calming initiatives, such as the bus zone and half-hour parking along Hilltop and Burnett Road, further supports this role. Given these factors the local shop is well-positioned to continue operating as a vibrant and active high street.
3: 6 Louis St, Granville	Retail destination	Remains	The presence of a well-established full-line supermarket in the cluster results in this shop cluster functioning as a local centre with a wider catchment area. With a greater emphasis on car accessibility, the focus for this centre should continue to be on providing retail and services that cater to the day-to-day convenience needs of the larger catchment, which can range from 8,000 to 12,000 people.
4: 12 Dellwood St, South Granville	Convenience based shops	Remains	The established cluster of shops has effectively integrated a diverse range of convenience-based retail and services, that appear to be meeting the community's needs and functioning well. It is recommended to maintain its established role as a centre focused on convenience to continue serving the community effectively.
5: Irrigation Rd, South Wentworthville	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to continue to cater to meeting the day-to-day convenience-based retailing (i.e. grocer, butcher, cafe) and service needs of the walkable catchment.
6: Fairfield Rd, Guildford West	Convenience based shops	Convenience based shops / specialised	Due to its size and close proximity to local workers, the cluster is ideally positioned to continue to cater to their day-to-day convenience-based retailing and service needs of these workers as well as local residents. Additionally, the presence of a well-established veterinary hospital in the cluster opens up opportunities for the centre to expand its services in this area and potentially incorporate additional ancillary uses, further specialising in veterinary care. This would enhance the cluster's offerings and attract a broader customer base.
7: Fowler Rd, Guildford West	Destination local shops / service centre	Remains	With its close proximity to McCredie Park, Guildford Leagues Club, and Guildford Swimming Centre, this local shop cluster has a great opportunity to serve as a destination for visitors. The shops are well-positioned to support the needs of park and swimming centre visitors by offering a variety of food and beverage options. The addition of outdoor dining facilities through appropriate planning policies can further enhance this offering. Additionally, maintaining a strong focus on convenience-based retailing, including grocery stores, butchers, and personal services will also be key to its success and to effectively serve the day-to-day needs of the local community. Furthermore, the presence of an established service station enables the cluster to cater to passing motorists in addition to its primary customer base.
8: Dell Street (Woodpark Shopping Centre)	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) this cluster is ideally positioned to continue to serve the day-to-day convenience-based retail and service needs of the walkable catchment area.
9: Coleman St, Merrylands	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) this cluster is ideally positioned to continue serve the day-to-day convenience-based retail and service needs of the walkable catchment area.
10: Old Prospect Rd, South Wentworthville	Secondary commercial centre	Remains	Given its size, current tenant mix, and the local context of being located off the M4 and Jersey Road, the cluster is well-suited to accommodate commercial tenants and cater to passing motorists, particularly with the presence of a well-recognised international fast food outlet (KFC).
11: Guildford Rd, South Granville	Convenience based shops /service centre	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience-based retailing and service needs of the walkable catchment, including students and parents of Blaxcell St Public School and local workers. The established service station will also mean the cluster will also have a dual role of servicing passing motorists.

Local shop cluster	Classification		Strategic function or focus
	Current State	Future State	
12: Clyde/Mona Streets, South Granville	Convenience based shops /service centre	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience-based retailing and service needs of the walkable catchment. The established service station will also mean the cluster will also have a dual role of servicing passing motorists.
13: 52-56 Excelsior St, Merrylands	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience-based retailing (ie grocer, butcher, cafe) and service needs of the walkable catchment
14: Rawson/ Clyde St South Granville	Secondary commercial centre /service centre	Remains	Considering the presence of non-conforming uses on the site and the cluster's proximity to the Wellington Business Park, it is more appropriate for this cluster to be used for commercial purposes. This is further supported by the upcoming Medina residences under construction, which will provide ground floor retail spaces, and the existing retailers in the local area that already serve the retail needs of local workers and residents. Therefore, shifting the focus to commercial activities would align well with the cluster's context and potential. The established service station will also mean the cluster will also have a dual role of servicing passing motorists.
15: Rawson Rd, Guildford	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) this cluster is ideally positioned to serve the day-to-day convenience-based retail and service needs of the walkable catchment area.
16: 234-238 Cumberland Rd, Auburn	Convenience based shops / service centre	Remains	Given its scale, current mix and local context (surrounded by residential properties) this cluster is ideally positioned to serve the day-to-day convenience-based retail and service needs of the walkable catchment area. The established service station will also mean the cluster will also have a dual role of servicing passing motorists.
17: Bathurst St, Greystanes	Destination local shops	Remains	With its close proximity to Bathurst St Park and Paul's Tennis Academy, this cluster has a unique opportunity to solidify its position as a destination for both the local community and visitors. The shops are well-positioned to support the needs of park visitors and tennis academy attendees by offering a variety of food and beverage options. The implementation of planning policies that facilitate outdoor dining can further enhance this offering. Furthermore, maintaining convenience-based retailing in cluster is important for meeting the day-to-day needs of the local community, including students and parents from Greystanes High School and the surrounding area and ensuring the success of the shop cluster.
18: Damien Ave, Greystanes	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience based retailing and service needs of the walkable catchment.
19: Maple St, Greystanes	Destination local shops	Remains	Due to its co-location within a park, this local shop cluster has the opportunity to serve as a destination for visitors. The shops can cater to the needs of park visitors and cyclists once the proposed cycleways are completed, offering a range of food and beverage options. Outdoor dining can be facilitated through appropriate planning policies to enhance the dining experience. Additionally, integrating convenience-based retailing (which the establishment currently lacks) will address the day-to-day needs of the local community. The inclusion of community uses, such as a community hall and scout hall, and hosting community events can further solidify the cluster's role as a central hub for the community.
20: Carnation St, Greystanes	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience-based retailing and service needs of the walkable catchment.
21: Hawksview St, Guildford	Convenience based shops	Convenience based shops / ancillary role	Given its scale, current mix, and surrounding residential properties, this local shop cluster is best suited to cater to the day-to-day convenience-based retailing and service needs of the walkable catchment. Given its proximity to Holroyd Private Hospital, there may be potential for the cluster to provide ancillary services that support the hospital in the future and this opportunity should be further explored.
22: 291-295 Clyde St, South Granville	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience-based retailing and service needs of the walkable catchment.

Local shop cluster	Classification		Strategic function or focus
	Current State	Future State	
23: 174-178 Excelsior St, Guildford	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience-based retailing and service needs of the walkable catchment.
24: 271-277 Excelsior St, Guildford	Convenience based shops	Remains	Given its scale, current mix and local context (surrounded by residential properties) the cluster is best suited to cater to meeting the day-to-day convenience-based retailing and service needs of the walkable catchment.
25: 17 Brooks Circuit, Lidcombe	Destination local shops	Remains	Due to the historical significance of the site and the presence of heritage assets, there is a unique opportunity for this local shop cluster to serve as a destination for visitors. The integration of community uses, such as cultural centres or heritage exhibitions, would enhance the appeal of the cluster. Improved public transport links to the area would also facilitate easier access for both local residents and tourists, further establishing its role as a destination local shop cluster.

APPENDIX A : DEMOGRAPHIC PROFILE 2021

Category	Number	%	Greater Sydney (%)
Five year age group (years)			
0 to 4	16,450	7	6
5 to 9	16,043	6.8	6.3
10 to 14	14,394	6.1	6.2
15 to 19	12,646	5.4	5.6
20 to 24	18,657	7.9	6.6
25 to 29	22,015	9.4	7.5
30 to 34	21,619	9.2	8
35 to 39	20,123	8.5	7.9
40 to 44	15,958	6.8	7
45 to 49	13,285	5.6	6.6
50 to 54	12,713	5.4	6.2
55 to 59	12,308	5.2	5.8
60 to 64	10,858	4.6	5.3
65 to 69	8,887	3.8	4.5
70 to 74	7,244	3.1	3.9
75 to 79	5,162	2.2	2.8
80 to 84	3,645	1.5	2
85 and over	3,442	1.5	2
Qualification level			
Bachelor or Higher degree	50,277	26.7	33.4
Advanced Diploma or Diploma	16,921	9	9.7
Vocational	21,425	11.4	14.8
No qualification	79,643	42.2	34.2
Not stated	20,291	10.8	8
Total persons aged 15+	188,557	100	100
Bachelor or Higher degree	50,277	26.7	33.4
Household by type			
Couples with children	29,292	38.2	34.4
Couples without children	14,176	18.5	23.3
One parent families	8,611	11.2	10.5
Other families	1,426	1.9	1.2
Group household	4,187	5.5	4
Lone person	13,980	18.2	22.2
Other not classifiable household	4,605	6	3.7
Visitor only households	351	0.5	0.6
Total households	76,628	100	100
Incomes			
Neg/Nil Income	2,041	2.8	2.1
$1 - $149	454	0.6	0.6
$150 - $299	1,095	1.5	1.1
$300 - $399	1,944	2.7	2
$400 - $499	3,788	5.3	4.3
$500 - $649	2,569	3.6	3.2
$650 - $799	4,248	5.9	4.6
$800 - $999	4,132	5.7	4.8
$1,000 - $1,249	5,071	7	5.9
$1,250 - $1,499	5,249	7.3	6.3
$1,500 - $1,749	4,136	5.7	5.2

Category	Number	%	Greater Sydney (%)
$1,750 - $1,999	3,892	5.4	5.2
$2,000 - $2,499	8,276	11.5	11.4
$2,500 - $2,999	5,280	7.3	7.2
$3,000 - $3,499	4,459	6.2	7
$3,500 - $3,999	2,934	4.1	4.6
$4,000 - $4,499	1,802	2.5	2.8
$4,500 - $4,999	2,292	3.2	5.7
$5,000 - $5,999	1,751	2.4	4.1
$6,000 - $7,999	1,219	1.7	4.2
$8,000 or more	349	0.5	1.7
Not stated	5,055	7	5.8
Total households	72,036	100	100

Source: Profile.ID for Cumberland Council

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