



# **WOOLWORTHS KELLYVILLE WEST**

Trade Area Assessment

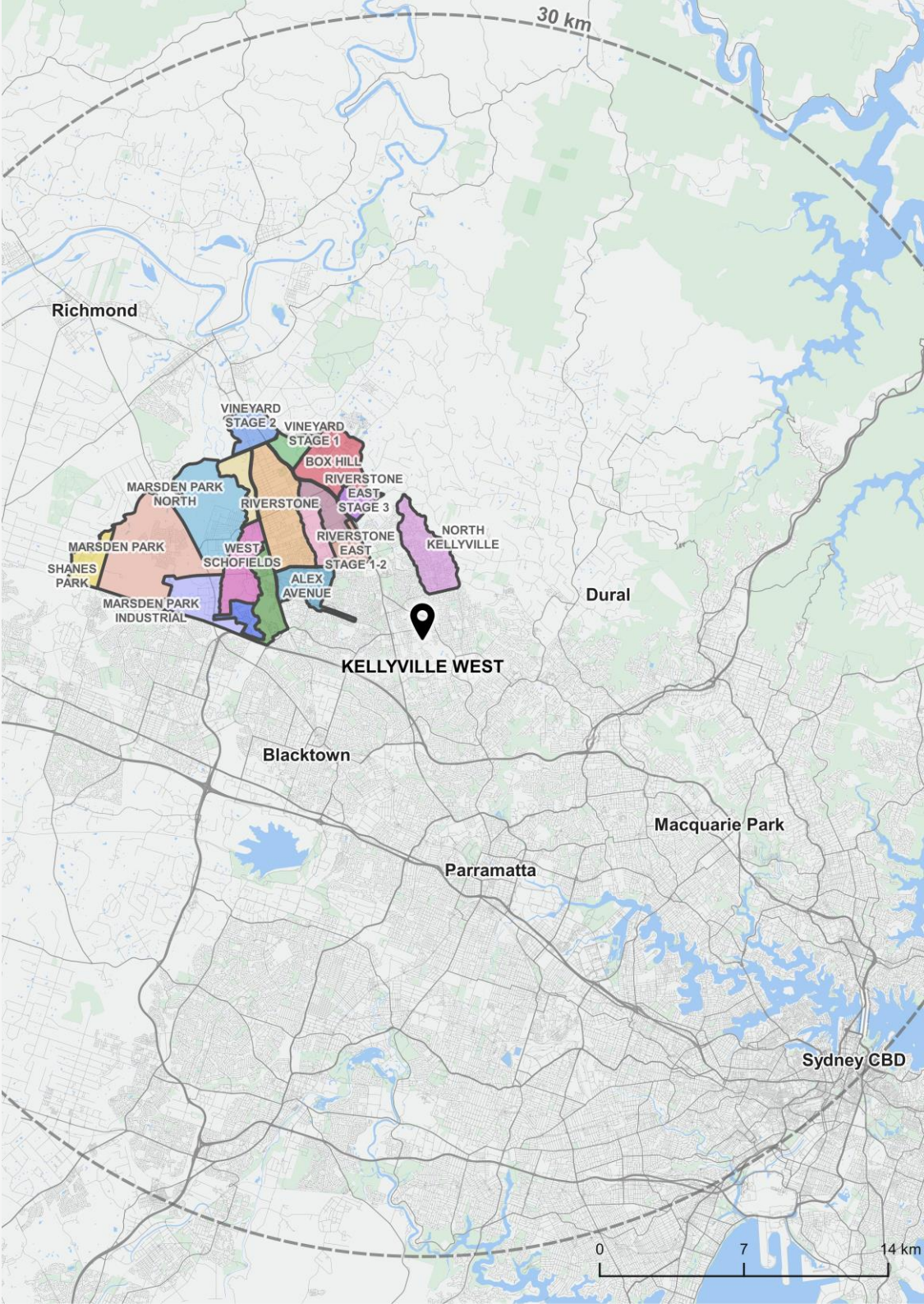
February 2022

# REGIONAL CONTEXT

The suburb of Kellyville is located in The Hills Shire Local Government Area (LGA), approximately 30 km north-west of the Sydney Central Business District (CBD).

Previously known as Baulkham Hills Shire, The Hills Shire is one of the fastest growing LGAs in Sydney, popular with young families. The Hills Shire is a predominantly rural and residential area, with expanding residential areas in the southern and central sections.

Sydney's North West Growth Area contains 10,000 hectares of designated, developable land. As detailed in the North West Priority Growth Area Land Use and Infrastructure Plan (May 2017), upon completion (30 – 40 years), the area will house some 90,000 new dwellings and a population of up to 250,000.



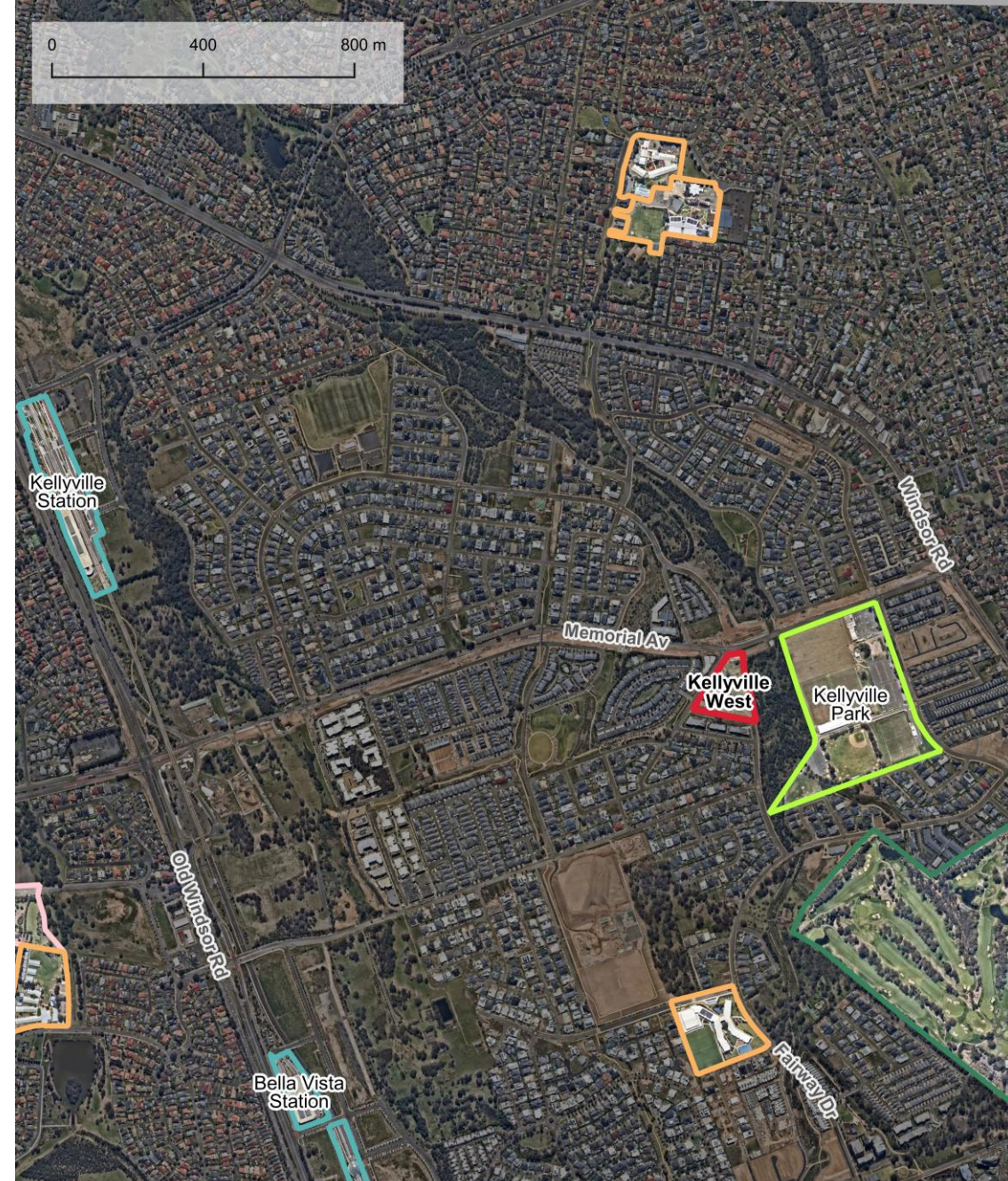
# LOCAL CONTEXT

The subject site is located at the intersection of Memorial Avenue and Hector Court in West Kellyville. The site enjoys a high-profile location in the heart of the growth area, with multiple residential developments under construction around the site.

Memorial Avenue is a major road connecting the area to Old Windsor Road and Windsor Road. The 2.2 km stretch of road is currently being upgraded from a two lane to four lane divided road with a central median. This is expected to significantly increase the roads carrying capacity, while reducing traffic delays.

The subject site is generally within 2 km of two recently completed Metro stations of Kellyville and Bella Vista. Both stations are provided on the new North West Metro line which provides a connection to Tullawong in the north with Chatswood in the south. Both stations provide significant provisions of decked car parking for commuters.

Overall, the lands surrounding the subject site comprise predominately residential uses, as well as Kellyville Memorial Park. The majority of the lands have been developed to date with the remaining parcels to accommodate a greater density of housing in the future. Kellyville Memorial Park is a major sporting destination with four rugby league fields, a baseball diamond, change rooms, and car parking.



PhotoMap by nearmap.com

- Site
- Education
- Sports
- Park
- Retail
- Health
- Transport

# MEMORIAL AVENUE UPGRADE

Transport for NSW announced construction funding for the Memorial Avenue upgrade in Kellyville on 10 January 2019. Construction commenced in March 2021.

The upgrade to Memorial Avenue, Kellyville will help to manage current traffic as well as allow for the expected increases in traffic due to residential and commercial development in the area. The upgrade will reduce congestion for over 30,000 motorists who use the road every day and is expected to be completed in 2023/24.

Memorial Avenue is about 2.2 km long and connects Old Windsor Road in the west with Windsor Road in the east. It bisects the Balmoral Road Release Area and provides access to Blacktown, Glenwood, Stanhope Gardens, Parklea, Baulkham Hills, Castle Hill, and Kellyville.

Key features include:

- Upgrading Memorial Avenue from a two lane to four lane divided road with a central median.
- Introducing a speed limit of 80 km per hour.
- Providing a wide central median to allow for future widening to six lanes, when required in the future.
- Providing landscaping in the median.
- Constructing pedestrian/cyclist path on both sides of Memorial Avenue.
- Installing bus priority capability at traffic lights and indented bus bays at Arnold Avenue and Severn Vale Drive intersections.
- Providing designated turning lanes and bicycle lanes at intersections with traffic lights.



# PLANNED COMPOSITION

The proposed Woolworths Kellyville West will comprise 7,723 sq.m of floorspace across two levels, with retail floorspace mainly provided on the ground floor and non-retail tenants on the first floor.

Up to 5,552 sq.m of retail floorspace is planned on the Ground Level, including:

- A full-line Woolworths supermarket of 4,282 sq.m (including BWS and home delivery).
- 13 retail specialty shops and two kiosks of a combined 1,351 sq.m

The floorspace on Level One will consist of three tenancies totalling a combined 2,090 sq.m, as well as one retail shop of 81 sq.m.

A total of 154 at-grade and 149 rooftop car parking spaces will be provided, with access from Hector Court and the planned Severn Vale Drive extension. The car parking provision of 303 spaces equates to 4 car spaces per 100 sq.m of centre floorspace, which is inline with the typical provision of 4 – 5 spaces per 100 sq.m.

## WOOLWORTHS KELLYVILLE WEST PLANNED COMPOSITION

Use	GLA (sq.m)
Woolworths	4,282
Specialty Retail - Ground	1,270
Specialty Retail - Level One	81
Commerical - Level One	2,090
<b>Total GLA</b>	<b>7,723</b>

*Source: Woolworths*



# WOOLWORTHS KELLYVILLE WEST PLAN



# MAIN TRADE AREA



The main trade area has been defined to extend 1 – 2 km around the site, reflecting the population catchment within the immediate growth area.

The main trade area is generally bounded by Windsor Road to the east, the Castle Hill Golf Course boundary to the south and Old Windsor Road to the west.

The Balmoral Road Release Area lies entirely within the main trade area, with the addition of the existing Elizabeth Macarthur Park and the north of the Kellyville Station Precinct along Samantha Riley Drive.



# BALMORAL ROAD RELEASE AREA

## DEVELOPING RESIDENTIAL PRECINCT

The section of West Kellyville bounded by Perkins Drive in the North, Windsor Road in the east, Free Settlers Drive and Spurway Drive in the south and Old Windsor Road in the west is defined as the Balmoral Road Release Area.

In 2011, The Balmoral Road Release Area had a population of approximately 700 persons. The area is forecasted to reach an ultimate yield of some 6,000 dwellings (approximately 13,000 persons) by 2031.

More recently in 2015, parts of the Balmoral Road Release Area were incorporated into the Kellyville Station Precinct Plan, which allows for high-density residential developments along Old Windsor Road in close proximity to the Kellyville Metro Station.





# MAIN TRADE AREA POPULATION

The main trade area population of 10,900 is projected to increase to 23,400 persons by 2036, representing an average annual growth rate of 5.2% or over 800 persons. This is well above the Sydney metropolitan and Australia benchmarks.

Immigration from overseas forms the largest component of population growth in Australia. There is likely to be large impact on Australia's population growth over the next 2 - 3 years due to the border closures and lower immigration.

In addition to the ongoing infill residential development occurring within the Balmoral Road Release Area, there are two major development precincts within the western portion of the main trade area:

- Kellyville Station Precinct will provide between 1,410 and 1,804 new dwellings (i.e. 3,500 – 4,500 persons).
- Bella Vista Station Precinct will provide between 2,905 and 3,822 new dwellings (i.e. 7,300 – 9,600 persons).

## MAIN TRADE AREA POPULATION, 2016 – 2036

Population	2016	2021	2026	2031	2036
Main Trade Area	6,400	10,900	15,400	19,400	23,400
Average Annual Change (No.)	2011-16	2016-21	2021-26	2026-31	2031-36
Main Trade Area	760	900	900	800	800
Average Annual Change (%)	2011-16	2016-21	2021-26	2026-31	2031-36
Main Trade Area	19.7%	11.2%	7.2%	4.7%	3.8%



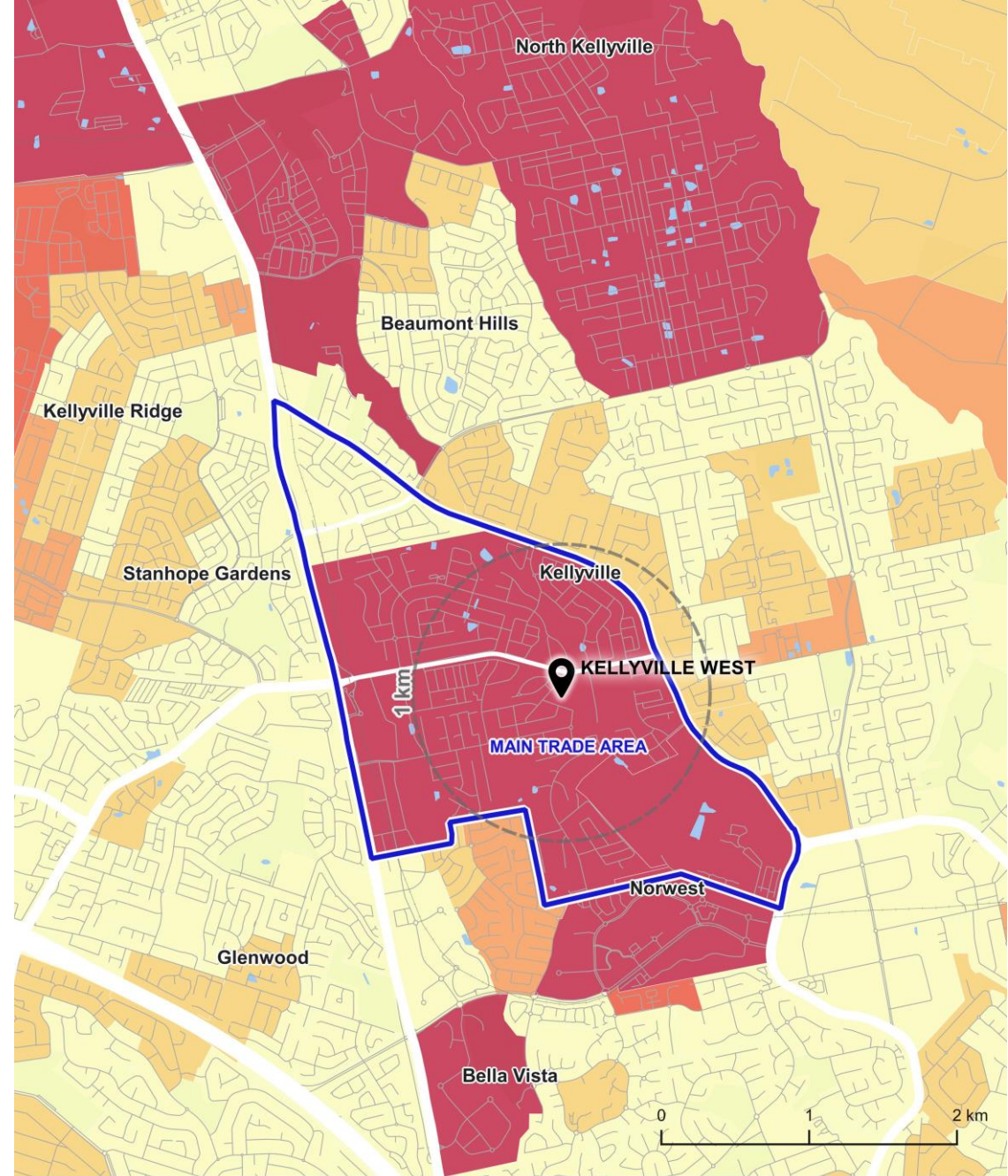
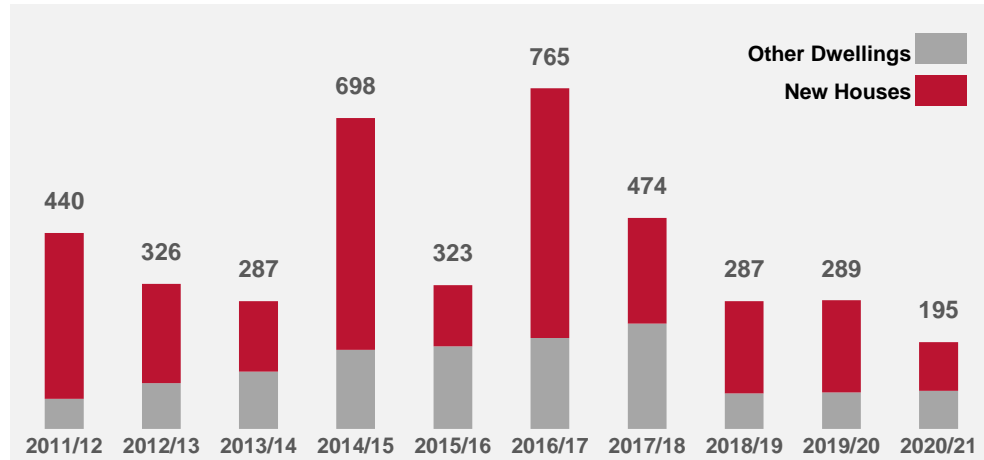
PhotoMap by nearmap.com

# NEW DWELLING APPROVALS

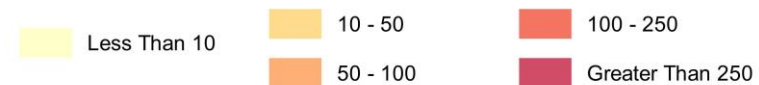
An average of 408 new dwellings were approved annually across the Woolworths Kellyville West main trade area over the 2011/12 – 2020/21 period.

Across the main trade area, residential dwellings accounted for \$59.4 million in 2020/21.

## MAIN TRADE AREA – NEW DWELLING APPROVALS



New Dwelling Approvals (2012-2021) by SA1

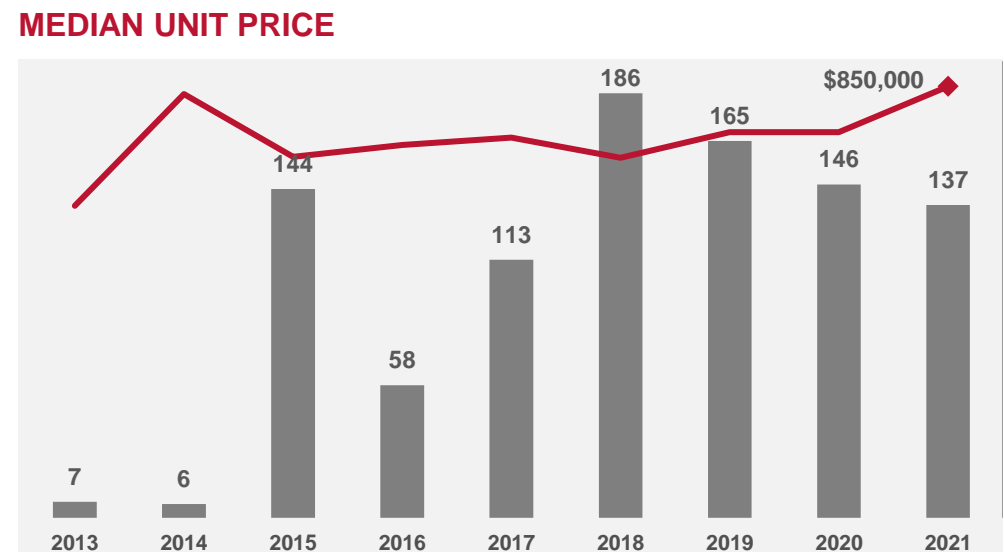
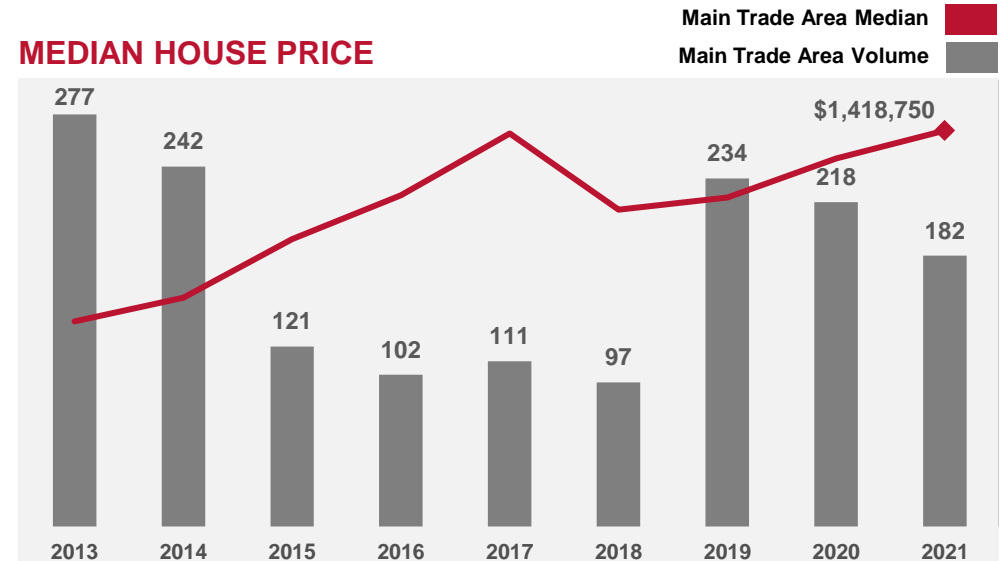


# KELLYVILLE WEST DWELLING PRICES

The Sydney housing market has been strong for over a decade.

Across the main trade area, median house and unit prices for 2021 were \$1.4 million and \$850,000, respectively. This represents an average annual increase of 8.6% in median house prices since 2013. Unit prices have increased by 4.1% annually over the same timeframe.

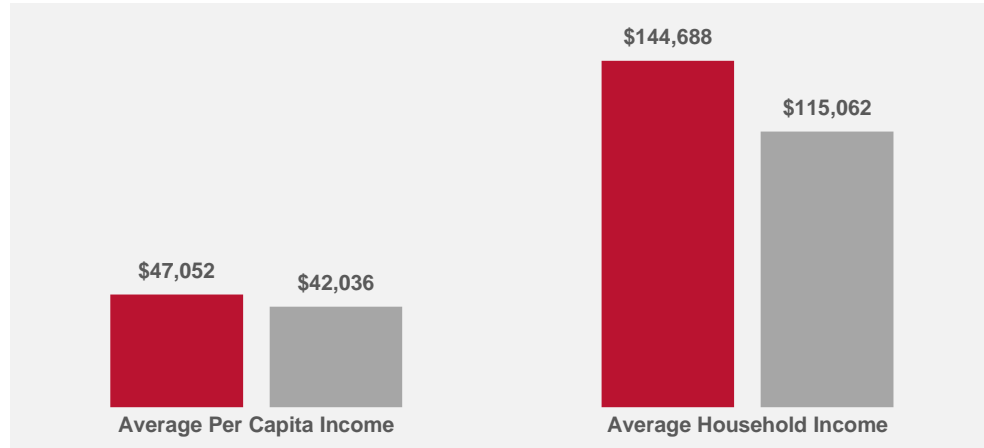
The median weekly rent for houses within main trade area is currently \$720 per week, while unit averages range from \$550 per week for one-to-three-bedroom units.



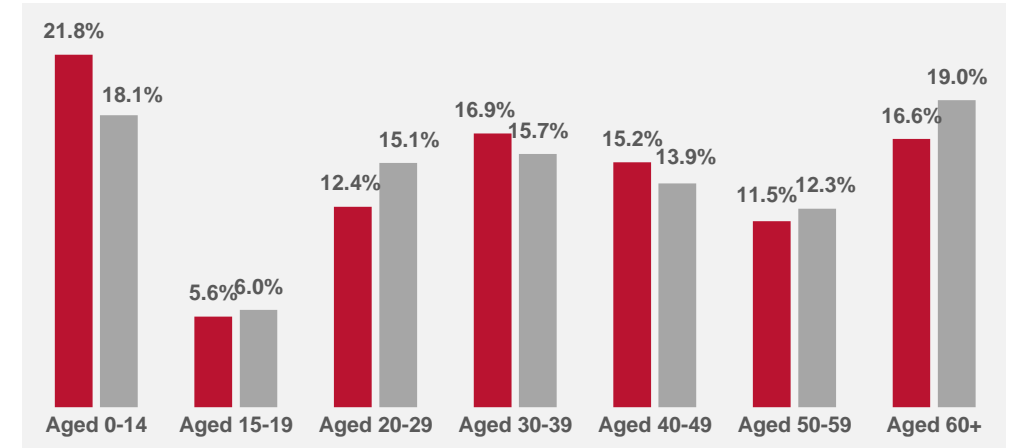
# MTA SOCIO-ECONOMIC PROFILE, CENSUS 2016

The main trade area is characterised by an affluent, two-working parent, predominately Australian born, family market who would associate strongly with a local shopping centre.

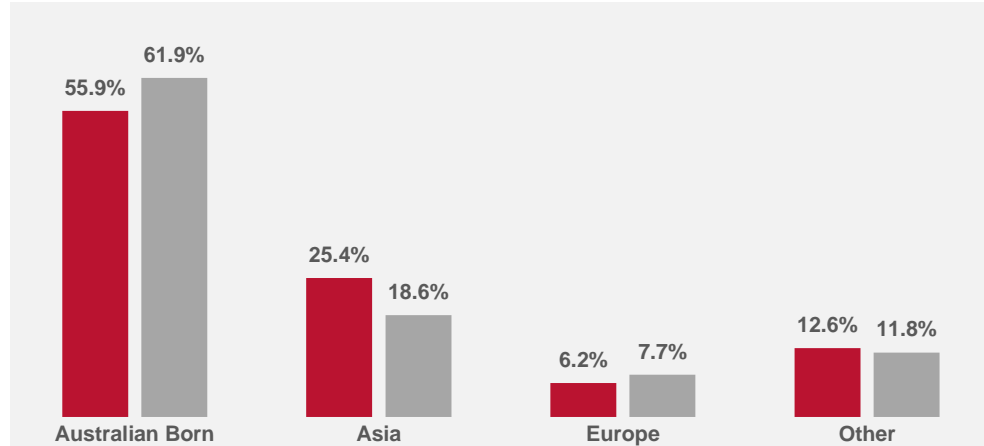
## INCOME LEVELS (\$)



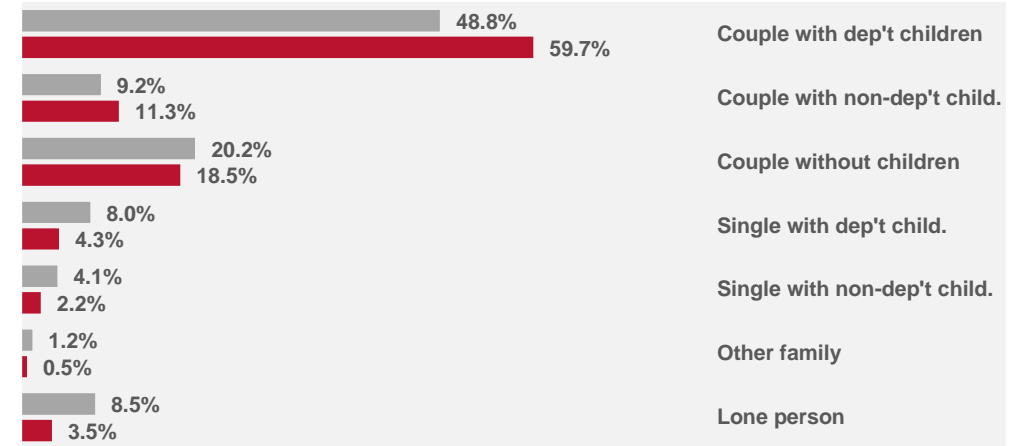
## AGE DISTRIBUTION (%)



## BIRTHPLACE (%)



## FAMILY TYPE (%)



# MTA SOCIO-ECONOMIC PROFILE, CENSUS 2016

Characteristic	Main TA	Syd Metro Average	Aust Average
<b>Income Levels</b>			
Average Per Capita Income	\$47,052	\$42,036	\$38,500
Per Capita Income Variation	11.9%	n.a.	n.a.
Average Household Income	\$144,688	\$115,062	\$98,486
Household Income Variation	25.7%	n.a.	n.a.
Average Household Size	3.1	2.7	2.6
<b>Age Distribution (% of Pop'n)</b>			
Aged 0-14	21.8%	18.1%	18.0%
Aged 15-19	5.6%	6.0%	6.1%
Aged 20-29	12.4%	15.1%	13.9%
Aged 30-39	16.9%	15.7%	14.1%
Aged 40-49	15.2%	13.9%	13.7%
Aged 50-59	11.5%	12.3%	12.9%
Aged 60+	16.6%	19.0%	21.3%
Average Age	35.9	37.8	38.9
<b>Housing Status (% of H'holds)</b>			
Owner/Purchaser	74.9%	64.7%	67.9%
Renter	25.1%	35.3%	32.1%
<b>Birthplace (% of Pop'n)</b>			
Australian Born	55.9%	61.9%	72.9%
Overseas Born	44.1%	38.1%	27.1%
• Asia	25.4%	18.6%	10.7%
• Europe	6.2%	7.7%	8.0%
• Other	12.6%	11.8%	8.4%
<b>Family Type (% of Pop'n)</b>			
Couple with dep't children	59.7%	48.8%	45.2%
Couple with non-dep't child.	11.3%	9.2%	7.8%
Couple without children	18.5%	20.2%	23.0%
Single with dep't child.	4.3%	8.0%	8.9%
Single with non-dep't child.	2.2%	4.1%	3.7%
Other family	0.5%	1.2%	1.1%
Lone person	3.5%	8.5%	10.2%

Sources: ABS Census of Population and Housing 2016



# RETAIL EXPENDITURE

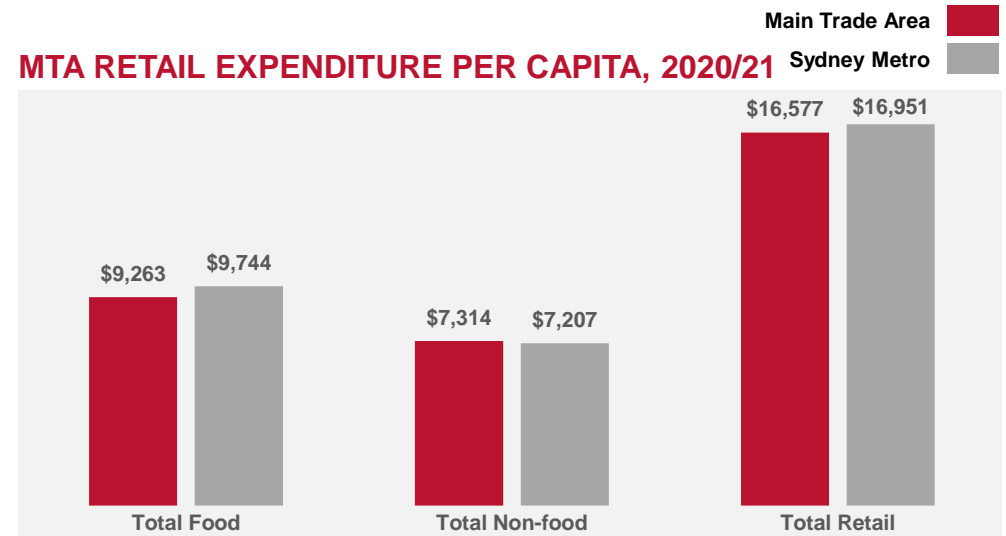
## RETAIL SPEND CATEGORIES

The average main trade area resident spends \$16,577 per year on retail.

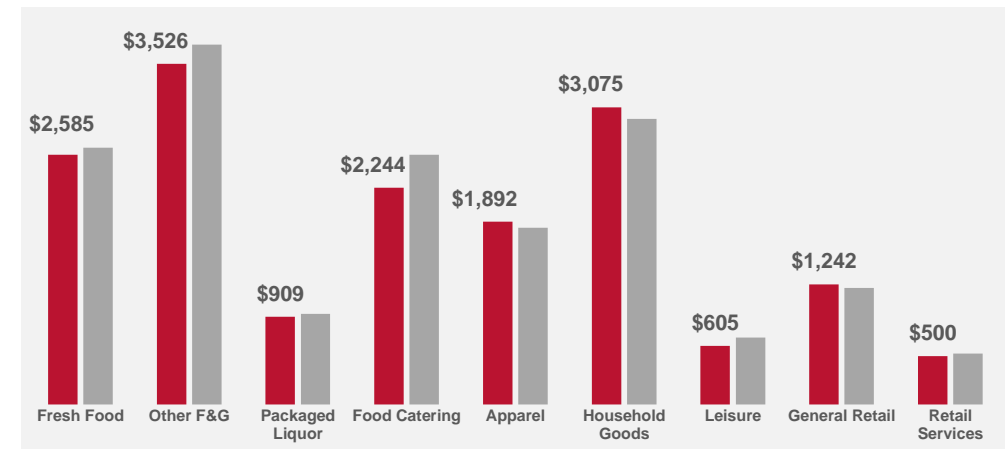
Around 57.4% of this retail expenditure, or \$9,263 per year, is food retail expenditure (i.e. food, liquor and food catering), with other key categories described as follows:

Per capita expenditure levels across the main trade area are generally in line with the Sydney metropolitan average.

This spending profile is typical of an Australian-born growth area and would be expected to increase as the area establishes further and becomes more affluent.



## MTA SPEND PER CAPITA BY CATEGORY, 2020/21



# RETAIL EXPENDITURE GROWTH

## SIGNIFICANT RETAIL SPEND

Main trade area retail spending is currently estimated at \$171.3 million and is projected to increase at an average annual rate of 7.8% to \$528.2 million by 2036.

The projected growth rate in retail spending considers the following:

- Food category inflation of 1.0% per annum in 2021, increasing to 1.5% over the 2022 - 2023 period. From 2024, food category inflation is assumed to increase to 2.0% per annum.
- Non-food category inflation of 0.5% per annum in 2021, increasing to 0.75% over the 2022 - 2023 period. From 2024, food category inflation is assumed to increase to 1.0% per annum.
- Real growth in retail spending per capita of 0.0% is assumed over the period to 2023, reflecting the impact of the COVID-19 pandemic on the economy. From 2024 real growth per capita is assumed at 0.5% annually for food retail and 1.0% for non-food retail over the period to 2036.
- Main trade area population growth is projected at around 5.2% per annum.

Food and liquor is the largest spending category at \$72.5 million, accounting for 42.3% of total retail spending. A proportion of this spending would be directed to facilities at the future Woolworths Kellyville West site.

## MAIN TRADE AREA RETAIL EXPENDITURE (\$M)

Area	2021	2026	2031	2036
Main Trade Area	\$171.3	\$270.7	\$387.8	\$528.2

## MTA RETAIL EXPENDITURE BY CATEGORY (\$M)

Commodity	2021	2026	2031	2036
Food & Liquor	\$72.5	\$115.9	\$167.2	\$229.2
Food Catering	\$23.2	\$37.6	\$55.6	\$78.2
Apparel	\$19.6	\$30.3	\$42.7	\$57.1
Household Goods	\$31.8	\$49.3	\$69.4	\$92.9
Leisure	\$6.3	\$9.7	\$13.7	\$18.3
General Retail	\$12.8	\$19.9	\$28.0	\$37.5
Retail Services	\$5.2	\$8.0	\$11.3	\$15.1

# COMPETITION

There are currently no supermarkets provided within the main trade area, with the closest supermarkets located at Kellyville, 1.8 km to the east of the site. All full-line supermarkets in the surrounding area generally trade strongly, above the Australia average of \$10,000 per sq.m.

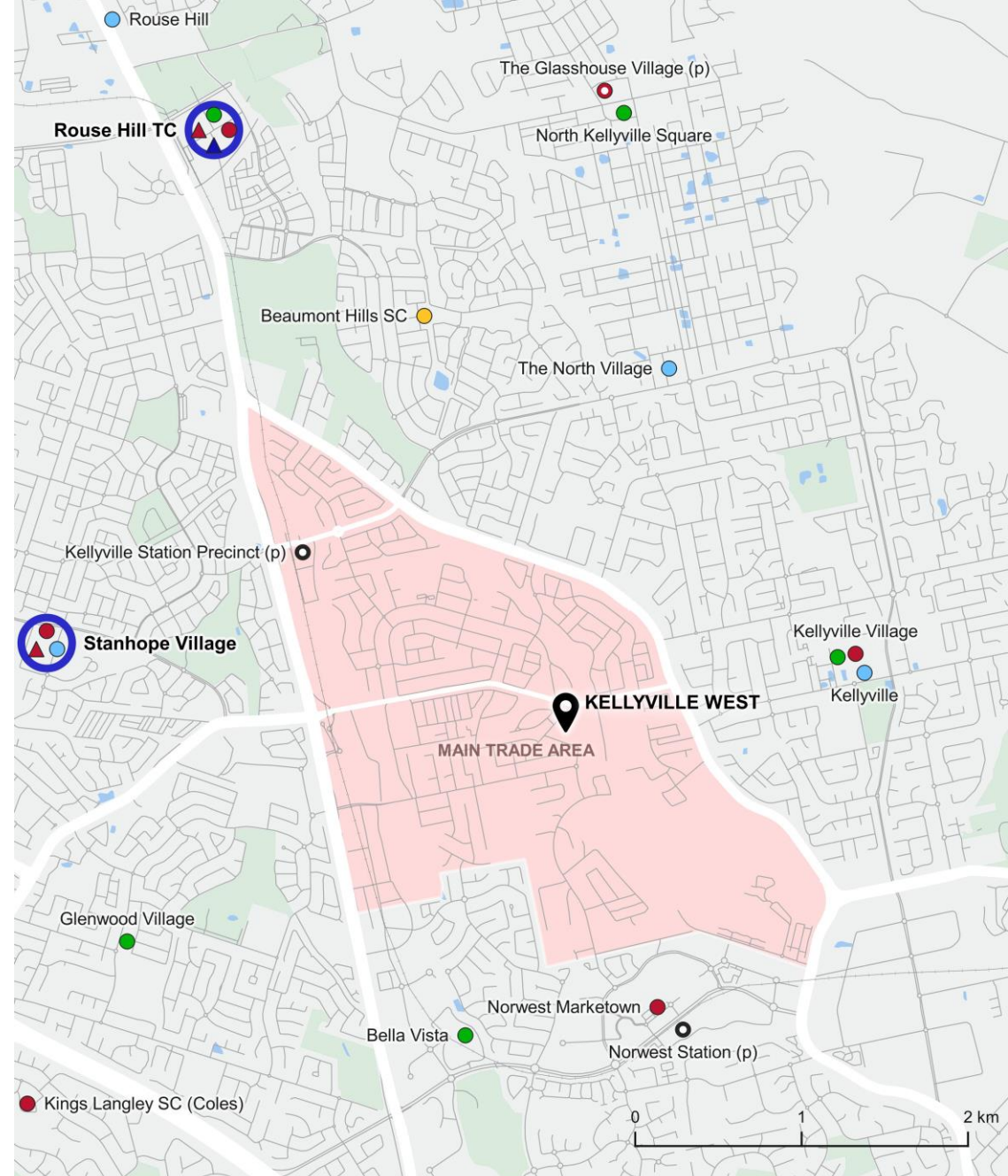
Typically, one full-line supermarket (3,000 sq.m and larger) is provided for every 8,000 – 10,000 residents. The Woolworths Kellyville West main trade area population is around 11,000, and is projected to increase to more than 23,000 by 2036. The future population would support at least two full-line supermarkets.

A full-line supermarket is proposed at Kellyville Station as part of a mixed use development some 2.5 km to the north-west (within main trade area). The Kellyville Station precinct is still a number of years from construction.

Shopping Centre	Shopfront			Supermarkets			Spec. Shops*	
	GLA	DDS	WOW	Coles	Aldi	IGA	FC	Total
<b>Sub-regional SCs</b>								
Rouse Hill TC	70,600	15,300	4,600	4,100	-	-	50	180
Stanhope Village	18,100	5,000	-	3,500	1,300	-	21	75
<b>Neighbourhood SCs</b>								
Kellyville Village	11,300	-	-	5,800	-	-	12	39
Kellyville Freestanding	8,100	-	4,500	-	1,600	-	n.a.	n.a.
Norwest Marketown	11,300	-	-	4,000	-	-	19	45
Glenwood Village	3,200	-	2,300	-	-	-	4	8
The North Village	3,000	-	-	-	1,500	-	3	9
Beaumont Hill SC	2,900	-	-	-	-	1,800	6	12

Source: Location IQ Database

\*Estimate



\* White dot indicates proposed store



# GYMS

There are many different sizes and forms of gyms throughout Australia, including:

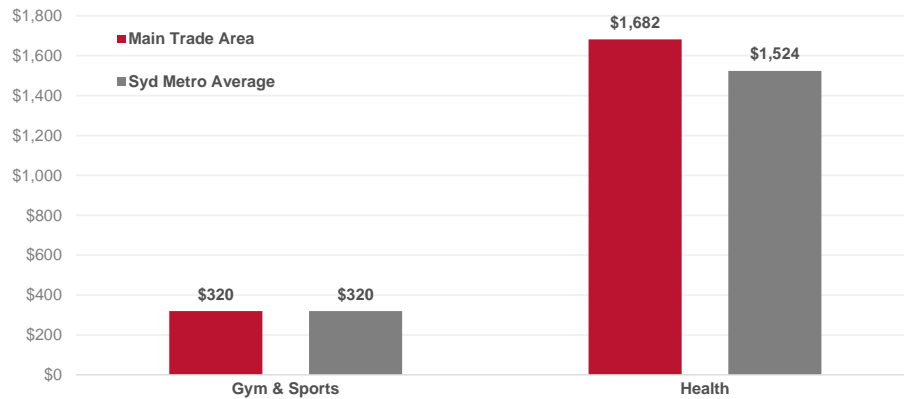
- The well-known brands and health clubs such as Fitness First and Virgin Active typically operate large sized gyms of around 1,000 sq.m and serve a catchment of approximately 50,000 – 70,000 persons.
- Local gyms which are typically around 200 sq.m in size serve a catchment of around 10,000 persons.

There are currently no national brand gyms in the main trade area, with the nearest being Plus Fitness at 25 Windsor Road. A number of gyms are located to the south.

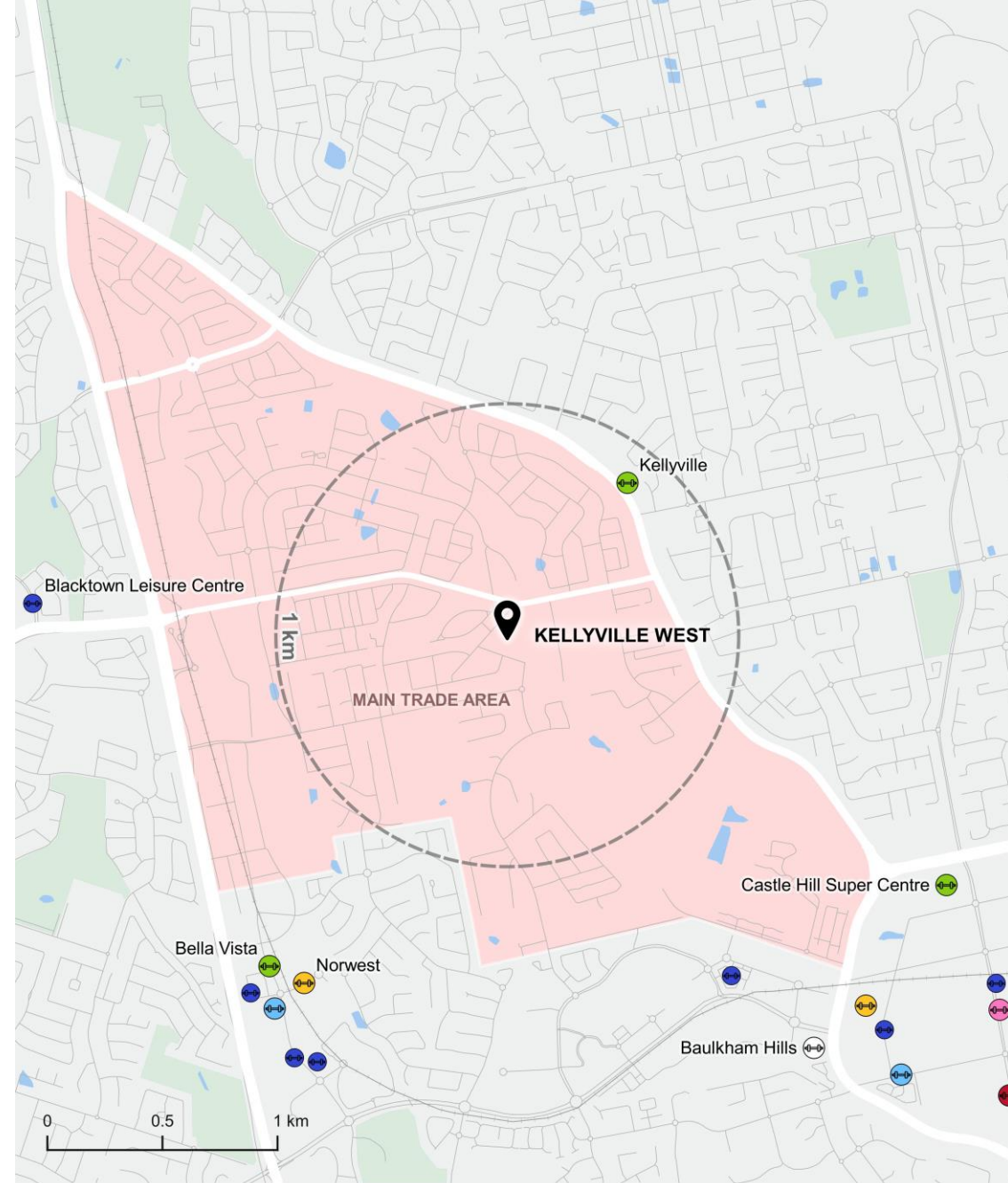
The site has several characteristics that would be attractive to potential gym operators include:

- Excellent local and regional accessibility;
- Convenience of the site, including being co-located with a full-line Woolworths supermarket and other uses, as well as on-site parking;
- Young demographic;

## GYM AND HEALTH PER CAPITA SPENDING, 2020/21



Source: Marketinfo



- Jetts Fitness
- F45 Training
- Fernwood Fitness
- Independent Gym
- Plus Fitness
- Anytime Fitness
- Virgin Active

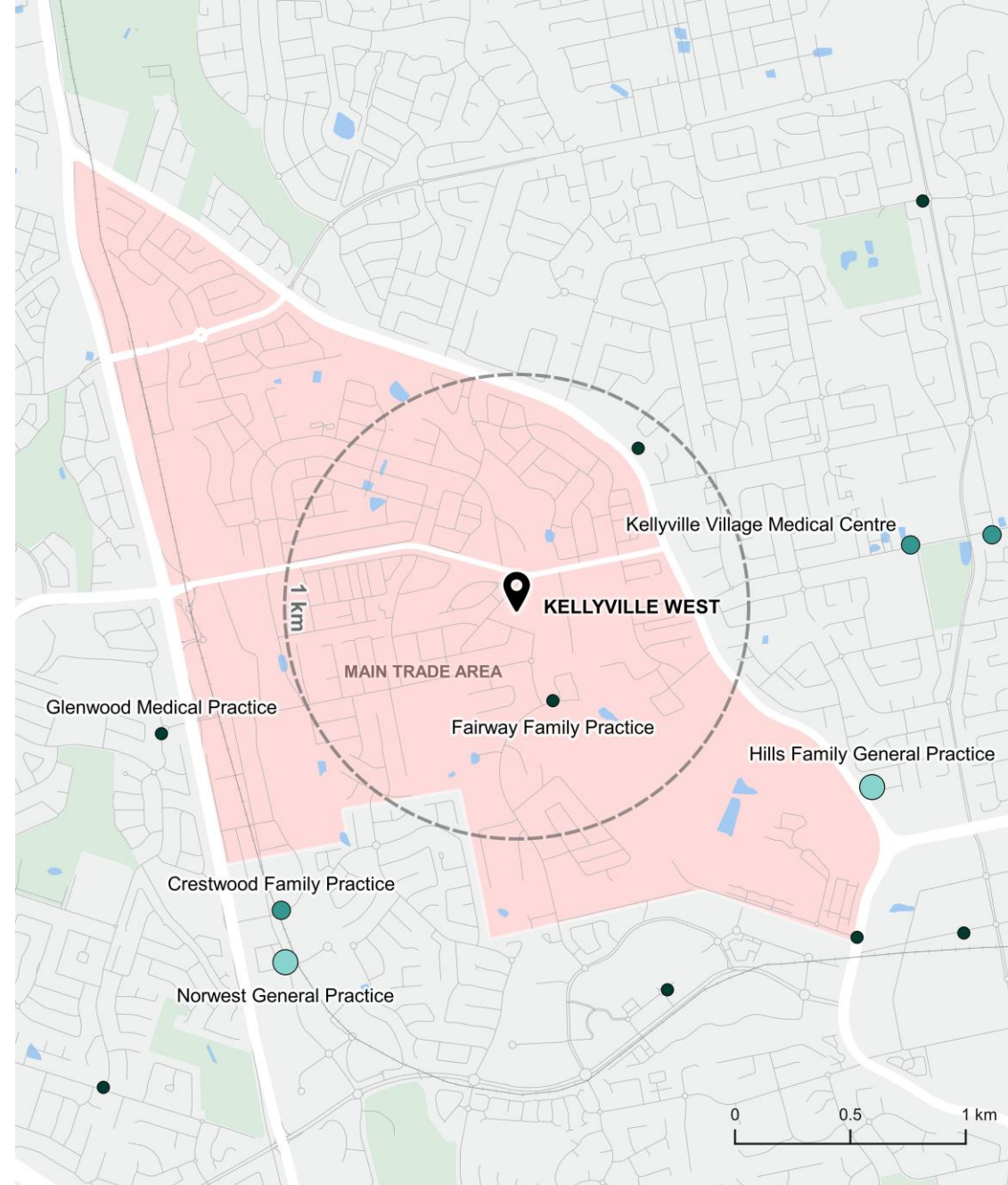
# MEDICAL FACILITIES

Medical centre is a term used for a collection of medical services provided at the same site, typically including General Practitioners (GPs) and other services such as a pharmacist, pathology, and the like.

Successful medical centres and facilities are often situated within high profile locations, along main roads or within proximity to a retail/commercial centre or transport node. Thereby facilities receive maximum exposure to passing traffic and are easily recognisable and accessible for the surrounding population.

Typically, 12.3 GPs are provided for every 10,000 persons in Australia. On this basis the main trade area population would support some 14 GPs, with this figure increasing to around 29 GPs by 2036.

There is currently only one general practice within the main trade area, namely Fairway Family Practice.



● 1 - 4 doctors ● 5 - 9 doctors ● 10+ doctors

# MEDICAL FACILITIES ANCILLARY USES

It is important for medical precincts and clinics to provide an adequate number of facilities, enabling a one-stop medical destination and serving a wide region.

Specialist and ancillary medical uses include a range of professions and services, such as:

- Chiropractor
- Chiropracist
- Dentist
- Nutritionist
- Physiotherapist
- Dermatologist
- Pediatrician
- Psychiatrist
- Psychologist
- Gynaecologist
- Cosmetic Surgery
- Cryotherapy
- Naturopath/Herbalist
- Speech therapy
- Medical equipment suppliers
- Pathology clinic

The main trade area population of around 11,000 persons is projected to more than double in size over the forecast period to 2036. Consequently, there is projected to be a commensurate rise in demand for an array of ancillary medical uses.

The table (right) illustrates the Baulkham Hills SA3 as well as, State and National benchmarks for the number of health professionals per 10,000 persons which provides a guide as to the additional supportable medical uses in the area.

## HEALTH PROFESSIONALS PER 10,000 PERSONS

Practitioners	Health Prof. per 10,000 persons		
	SA3	NSW	AUS
Chiropractors	4.3	2.3	2.2
Dental Practitioners	12.1	8.9	9.6
GP's	13.0	11.9	12.8
Nurses and Midwives	89.8	136.2	160.3
Occupational Therapists	7.2	8.1	9.4
Optometrists	2.6	2.4	2.4
Pharmacists	9.7	12.0	12.9
Physiotherapists	14.4	12.6	13.7
Podiatrists	1.4	1.9	2.2
Psychologists	2.2	15.2	14.9

Baulkham Hills  
Source: AIHW

**Undersupply**  
**Oversupply**

# FAST FOOD

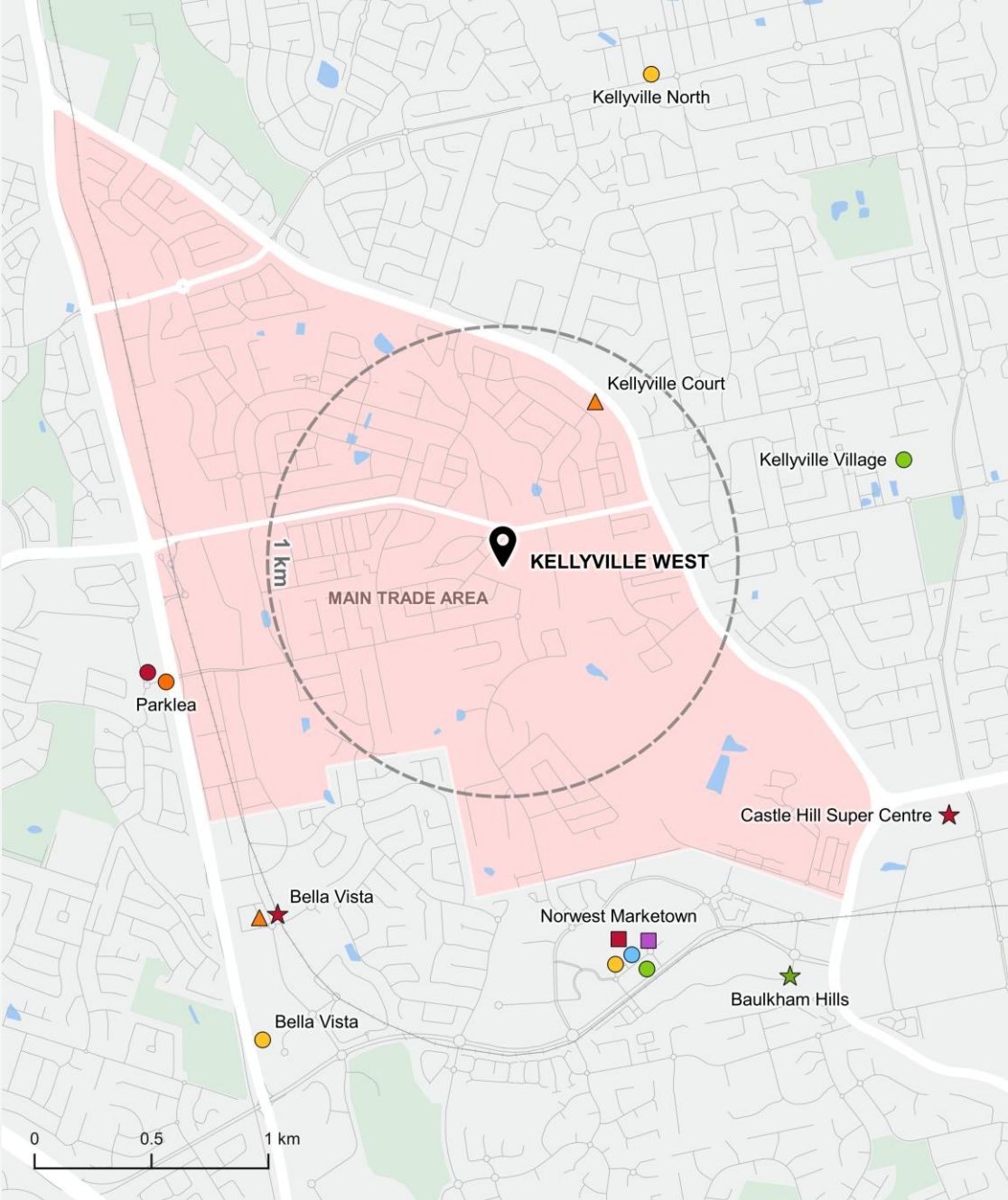
The existing focus for fast food in the area is currently concentrated around Norwest, as well as at Kellyville, Bella Vista, and Parklea.

Prospective fast-food brands provided at Kellyville West would typically serve a broader catchment area. With the main trade area population expected to increase to 23,400 persons by 2036, there is a high potential for a range of fast food outlets.

## MAJOR FAST FOOD BRANDS, 2021

Brand	Syd Metro		Australia	
	No of Stores	Persons Per Store	No of Stores	Persons Per Store
Subway	201	26,700	1,305	19,700
McDonald's	199	27,000	1,039	24,700
Domino's Pizza	137	39,200	737	34,900
The Coffee Club	26	206,400	287	89,500
KFC	132	40,700	697	36,900
Red Rooster	38	141,200	334	76,900
Hungry Jacks	58	92,500	448	57,400
Pizza Hut	75	71,600	270	95,200
Oporto	96	55,900	184	139,700
Soul Origin	57	94,200	120	214,200

Source: Location IQ Database



- KFC
- Subway
- Hungry Jacks
- Oporto
- McDonalds
- Domino's Pizza
- Mad Mex
- Sumo Salad
- ★ The Coffee Club
- ★ Gloria Jean's Coffee

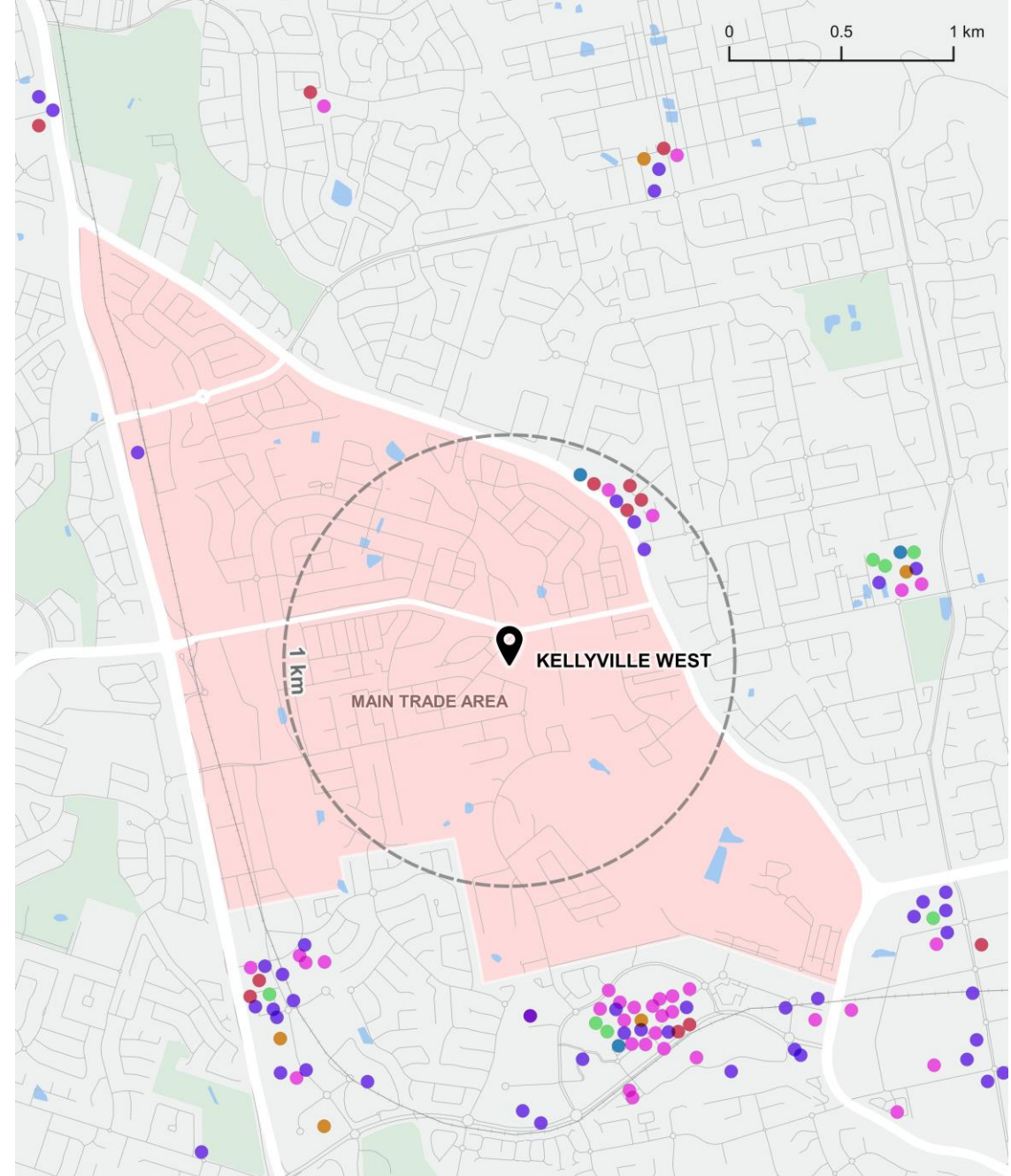


# FOOD CATERING

There is a limited provision of food catering facilities within the main trade area currently.

Food catering tenants that could locate at the Woolworths Kellyville West development include tenants such as:

- Restaurants
- Cafes
- Sandwich shops
- Pizza
- Sushi



- |                  |              |
|------------------|--------------|
| ● Cafe           | ● Pizza      |
| ● Fish and Chips | ● Restaurant |
| ● Kebab          | ● Sushi      |

# FOOD RETAIL

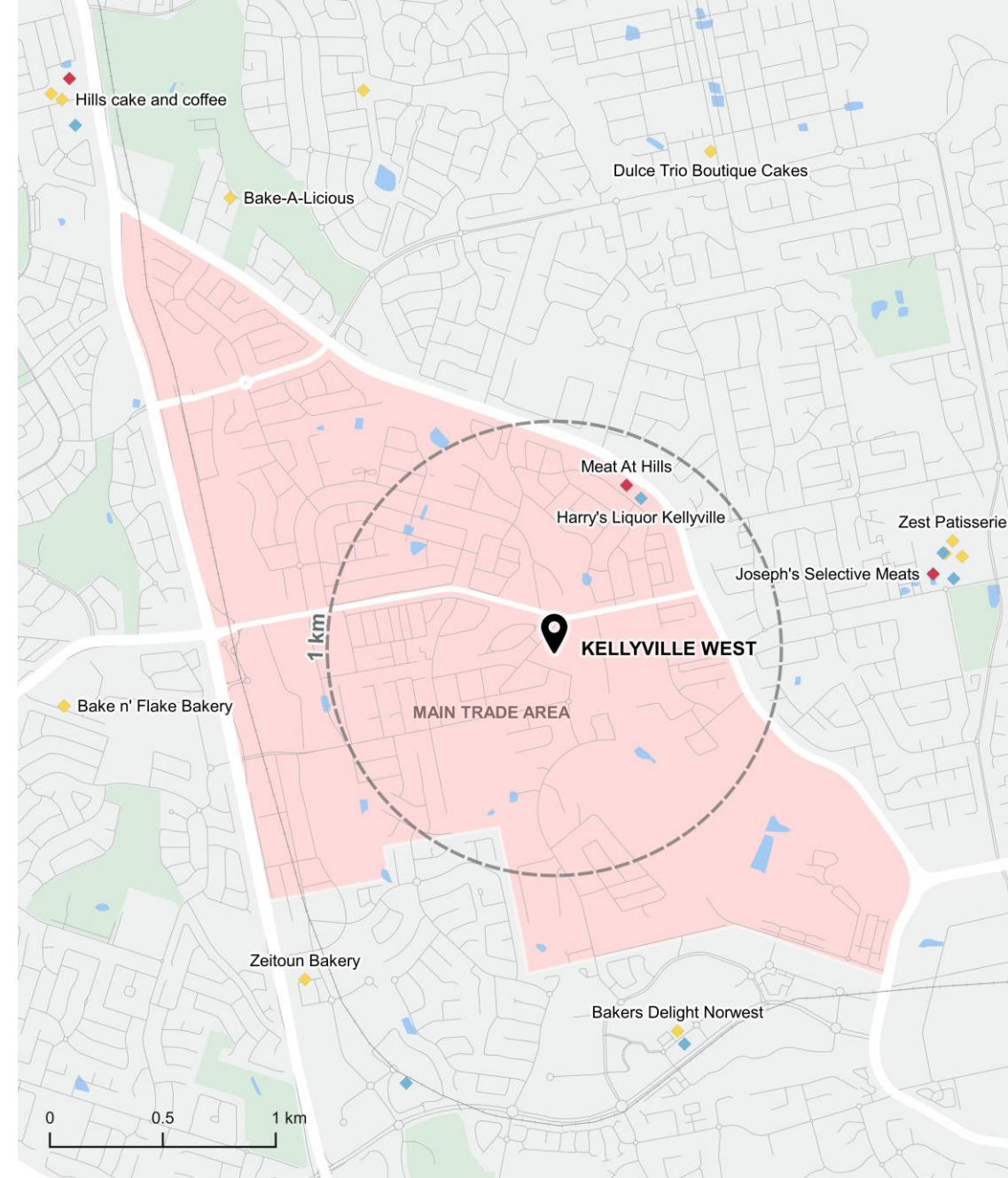
There is a strong opportunity for a food retailers nearby to the Woolworths supermarket and BWS, reinforcing the fresh food offer.

Possible tenants could include traders such as a bakery, butcher, chicken shop, fishmonger, or similar.

Each would be a key trader in a supermarket-based shopping centre.

There is generally a limited provision of food retailers within the Kellyville West main trade area at present.

Ultimately food retail tenants are likely to be supportable at the site and should be provided near the supermarket entrance.

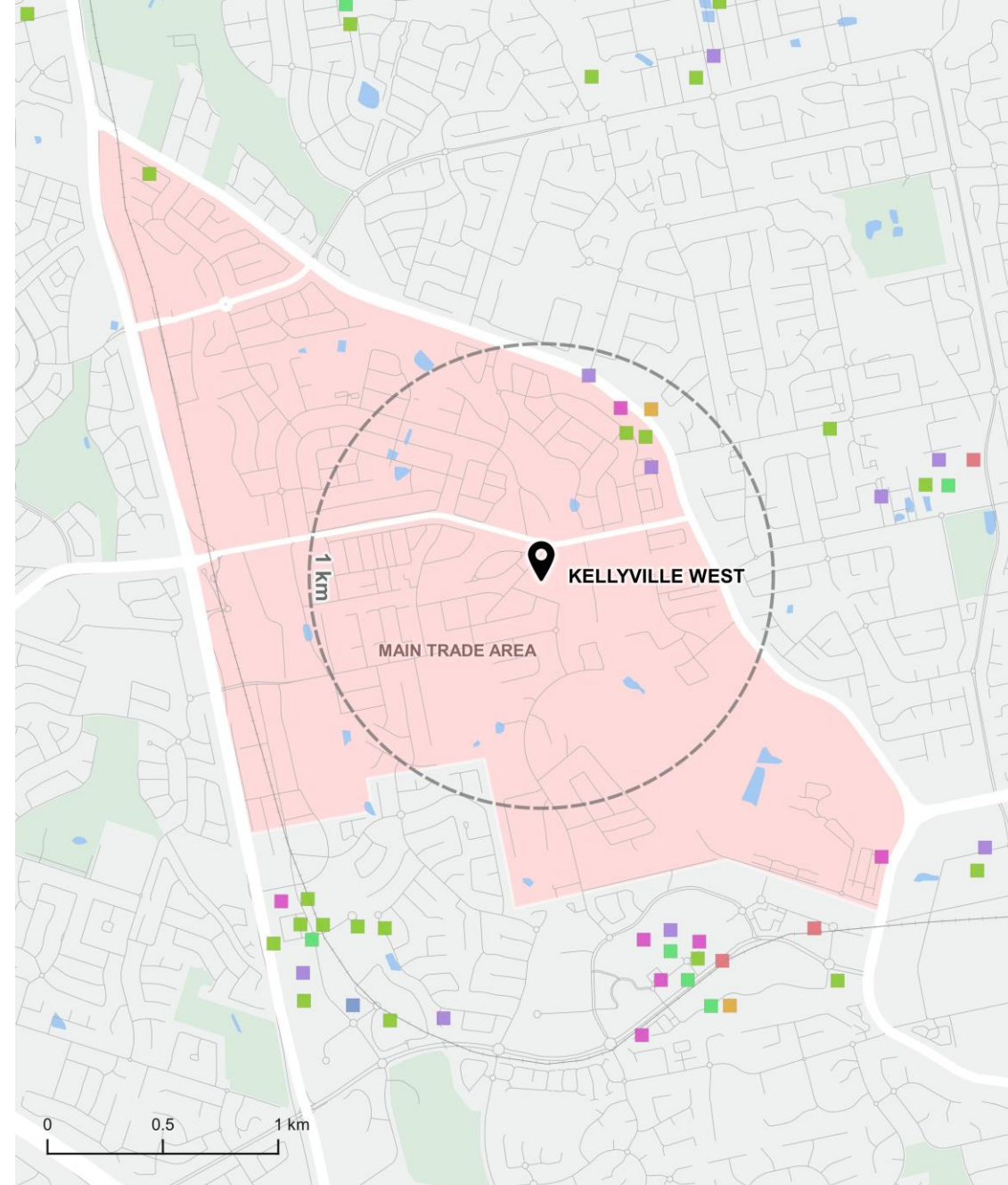


- ◆ Bakery
- ◆ Green Grocer
- ◆ Butcher
- ◆ Liquor

# OTHER USES

Other tenants that could locate at the Woolworths Kellyville West development include retail service tenants and commercial suites such as:

- Hairdressers
- Nail Salons
- Banks
- Post Office
- Dry Cleaners
- Travel Agents
- Betting Agencies



# EMERGING TRENDS

## CONVENIENCE RETAIL

With ever-increasing workloads and time pressures, convenience is a growing trend in the retail industry. All types of retailers are seeking to meet this rising demand for convenience, however those that can facilitate the most seamless integration with the consumers' daily activities will be the ones to succeed.

Demand for convenience is expected to continue to grow over time, particularly post COVID-19, and new entrants to the convenience space will continue to emerge, blurring the lines between traditional retail channels. Through this process, the delivery of convenience and concept of serving the customer is likely to also evolve.

## SUPERMARKETS

Supermarkets in Australia have significantly advanced in recent years, with full-line stores such as Woolworths now including all essential everyday items as well as a coffee shop, sushi kiosk, pizza station and other service areas.

Along with the increasing popularity of home delivery, pick up options have also increased in recent years. The 'food for now' concept also continues to grow, with both supermarket giants offering a significant range of grab-and-go dinner options or meal kits.

Customers are bucking the traditional grocery shopping model by visiting stores more frequently and purchasing smaller volumes per visit. Based on research undertaken by Roy Morgan, more than half of Australian grocery shoppers visit a supermarket several times a week, while some 6% percent visit every day.

Convenience retail has moved beyond the quick and easy concept and toward a simplification model, where consumers can get precisely what they need without having to think overly hard or navigate unnecessary obstacles. In order to delivery this level of convenience, retailers must continue to leverage new technology.

## ACTIVITY CENTRES

Shopping centres are transforming to activity centres that have extended hours of operation, not just limited to 9am – 5pm daily. The best activity centres can operate from early morning until late at night, seven days a week - and appeal to a range of customers in terms of age and demographic profile.

Experiential design has strong ties to the concept of placemaking, which aims to increase foot traffic and visitation to a site or shopping centre by making it a compelling or captivating place to visit.

The Woolworths Kellyville West site will cater to the existing opportunity/demand for retail floorspace (particularly supermarkets and convenience) that will continue to accrue with population growth, while also creating a 'destination' for the local community.





# EMERGING TRENDS

## RETAIL SPECIALTY

Key national specialty stores are rationalising store networks and are looking to locate at shopping centres where they have their highest chance of success.

It is anticipated that, due to rising vacancy levels in the retail industry, the leasing environment will become increasingly competitive (i.e. more difficult to secure key operators).

In this sense, the Kellyville West development as a best-in-class neighbourhood centre will maximise each of the attributes likely to attract quality specialty tenants, including:

- Strength of the supermarket anchor
- Convenience and amenity
- Foot traffic/customer flows for cross shopping
- Around-the-clock activation
- Integration with the surrounding precinct

Quality, targeted specialty shops would provide a more niche, everyday retail offer that would appeal to residents, complementing the everyday offer of the shopping centre. The centre should be a day-to-day convenience retail destination, which includes food retail, food catering and retail services, as well as non-retail uses that further add to the customer draw and attraction of the site.

## TECHNOLOGY

Technology continues to advance at a rapid pace and, as an ever-evolving category, retail is at the forefront. This progress has so far significantly favoured e-commerce, as traditional advantages of brick and mortar shops are neutralised one-by-one.

Deloitte's Future of the Mall report states that as technology advances, the savviest retailers will be focusing not on technology for technology's sake, but on how to use it to deliver the entire customer journey to include "a seamless omnichannel experience that connects the online world to a captivating in-person experience in a right-sized, technology enabled, service-driven store".

# KEY ATTRIBUTES

<b>Regional &amp; Local Accessibility</b>	Excellent regional and local accessibility due to the high-profile location of the site with exposure to passing traffic along Memorial Avenue which is currently being upgraded to a four lane road. Memorial Avenue is about 2.2 km long and connects Old Windsor Road in the west with Windsor Road in the east. It bisects the new Balmoral Road development and provides access to Blacktown, Glenwood, Stanhope Gardens, Parklea, Baulkham Hills, Castle Hill and Kellyville.
<b>Established &amp; Desirable Locality</b>	<p>Kellyville West is a large and growing residential area that is popular with young families. The location is reinforced by the adjacent Kellyville Memorial Park which is a significant sporting destination for the community.</p> <p>Median house and unit prices for 2021 were \$1.4 million and \$850,000, respectively. This represents an average annual increase of 8.6% in median house prices since 2013. Unit prices have increased by 4.1% annually over the same timeframe.</p>
<b>Subject Development</b>	Woolworths Kellyville West will be a convenience-based neighbourhood shopping centre, anchored by a full-line Woolworths supermarket of 4,282 sq.m (including BWS and direct to boot), 13 shops, two kiosks, and upper level commercial tenants. In total, Woolworths Kellyville West will comprise 7,723 sq.m across two levels as well as a total of 154 at-grade and 149 rooftop car parking spaces (i.e. 303 car spaces in total).
<b>Main Trade Area Population</b>	The main trade area population is currently estimated at 10,900 and is projected to increase at a strong 5.2% per annum to 23,400 persons in 2036.
<b>Socio-economic Profile</b>	The main trade area is characterised by an affluent, two-working parent, predominately Australian born, family market who would associate strongly with a local shopping centre.
<b>Convenience</b>	The planned Woolworths Kellyville West development would be a modern development of a shopping centre providing a high level of customer amenity.
<b>Competition</b>	<p>There are no full-line supermarkets in the main trade area, and all full-line supermarkets the surrounding area generally trade strongly, above the Australia average of \$10,000 per sq.m.</p> <p>Typically, one full-line supermarket (3,000 sq.m and larger) is provided for every 8,000 – 10,000 residents. The Woolworths Kellyville West main trade area population is around 11,000 and is projected to increase to more than 23,000 by 2036. The future population would support at least two full-line supermarkets.</p> <p>A full-line supermarket is proposed at Kellyville Metro Station as part of a mixed-use development some 2.5 km to the north-west (within main trade area). The Kellyville Station Precinct is still a number of years from construction.</p>
<b>Emerging Trends</b>	Demand for convenience is expected to continue to grow over time, particularly post-COVID-19. New entrants to the convenience space will continue to emerge, blurring the lines between traditional retail channels. The Woolworths Kellyville West site will cater to the existing opportunity/demand for retail floorspace (particularly supermarkets and convenience) that will continue to accrue with population growth, while also creating a 'destination' for the local community with a range of uses at one site.



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