Amendment C171
Melton Planning Scheme

Expert witness statement of
Tony Dimasi, MacroPlan Dimasi

March 2017

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Expert witness details

Name and address of expert

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Expert's qualifications and experience

- Bachelor of Arts (Hons.), University of Melbourne
- Master of Arts, University of Melbourne

My CV is included as Appendix 1 to this statement of evidence. I have extensive experience in the field of retail economics and analysis gained over the past 35 years, having provided independent advice on numerous retail development projects and proposals throughout all parts of Australia, to a broad range of clients.

Expert's area of expertise

- I have practised as a consulting economic and retail analyst since 1982. During that time I have worked in all states of Australia and also in New Zealand and Asia, and have advised on many thousands of retail developments of all types and sizes.
- My assessments have covered demand and supply analysis, commercial feasibility assessments and economic impact assessments, for many hundreds of shopping centres of all sizes and mixes, as well as numerous freestanding retail stores, including supermarkets, discount department stores, toys category killer stores, book stores, special apparel stores, smaller foodstores and packaged liquor stores of all sizes.

- I have appeared as an expert witness in the various jurisdictions across all parts of Australia and New Zealand on numerous occasions, including:
  - The Administrative Appeals Tribunal (AAT) of Australia;
  - The Land and Environment Court of New South Wales;
  - Independent Ministerial Panels and VCAT in Victoria;
  - The Planning and Environment Court of Queensland;
  - The State Administrative Tribunal in Western Australia;
  - The Environment, Resources and Development Court of South Australia;
  - The Resource Development Planning Commission in Tasmania;
  - The Liquor Licensing Court of South Australia;
  - The Petroleum Products Retail Outlets Board of South Australia; and
  - The Environment Court of New Zealand.
- I have also appeared as an expert witness before various government and ACCC inquiries into the retailing of food, liquor and groceries in Australia, including:
  - the 1999 Joint Parliamentary Inquiry into the Australian Retail Sector (the Baird Inquiry);
  - the Inquiry into the Competitiveness of Retail Prices for Standard Groceries (2008) undertaken by the Australian Consumer and Competition Commission (ACCC); and
  - the 2004 ACT Grocery Inquiry (the Martin Inquiry).
- Over the past 35 years I have provided, and continue to provide, research and advisory services to a wide range of clients, including major retailers such as Woolworths, Target, Dan Murphy's, Toys 'R' Us and many others. I have also provided services, and continue to provide services, to most of Australia's shopping centre management and development groups, including AMP Capital Shopping Centres, Colonial First State Global Asset Management, Mirvac, Stockland, Lend Lease, GPT, Federation Group, Perron Group, ISPT, Pacific Group and numerous others.

- The majority of my work as an independent economic consultant has related to projects which have proceeded – i.e. new shopping centres, supermarkets, liquor stores, discount department stores, toy stores, or other retail facilities which have been built, expanded, or redeveloped. My independent assessments of trade area definitions and related factors which go to the heart of a new retail centre's or store's anticipated performance are regularly used for sign-off by property committees and boards of the companies for which I provide these services.

- I have undertaken work on numerous occasions throughout Melton and the broader western Melbourne region over many years, relating to both existing and proposed retail developments.

I have made all the inquiries that I believe are desirable and appropriate and no matters of significance which I regard as relevant have to my knowledge been withheld from the Panel.

Introduction

The statement has been prepared for the assistance of the Panel in considering Amendment C171 to the Melton Planning Scheme.

I have been instructed by Minter Ellison on behalf of Ranfurlie Developments Pty Ltd, owner of Burnside Hub SC and surrounding vacant land. My instructions have been to review the proposed Amendment, in particular with regard to the proposed designation of Burnside Hub as an Activity Centre under the Melton Retail & Activity Centres Strategy (MRACS).

In preparing this statement I have inspected both the subject site at Burnside and the surrounding areas, including each of the relevant centres in the surrounding suburbs. I have also considered a number of relevant documents, in particular:

i. Amendment C171 Melton Planning Scheme
ii. City of Melton Retail & Activity Centres Strategy, March 2014
iii. Melton Retail Activity Centres Strategy, Background Analysis and Discussion, November 2013

Throughout my statement I make reference to data and information from various sources, in particular the Australian Bureau of Statistics. In each case the data source is explicitly noted.

The contents of the remainder of this statement are set out as follows:

- **Section 1** details the location of Burnside Activity Centre and the regional context within which it operates/will operate.
- **Section 2** presents an analysis of the study area which is relevant to Burnside Activity Centre, and of the current and future retail floorspace demand within this area.

- **Section 3** presents the findings of an extensive independent household survey of shopping behaviours and preferences undertaken throughout Burnside and the surrounding suburbs.
- **Section 4** discusses the economic benefits and possible disbenefits of further expansion of the centre.
- **Section 5** presents a summary of the key conclusions that I draw from the analysis in this report.

Section 1: Centre location and context

1.1 The Burnside Activity Centre is located in the suburb of Burnside, which is situated within Melbourne's north-western growth corridor, approximately 20 km north-west of the Melbourne CBD.

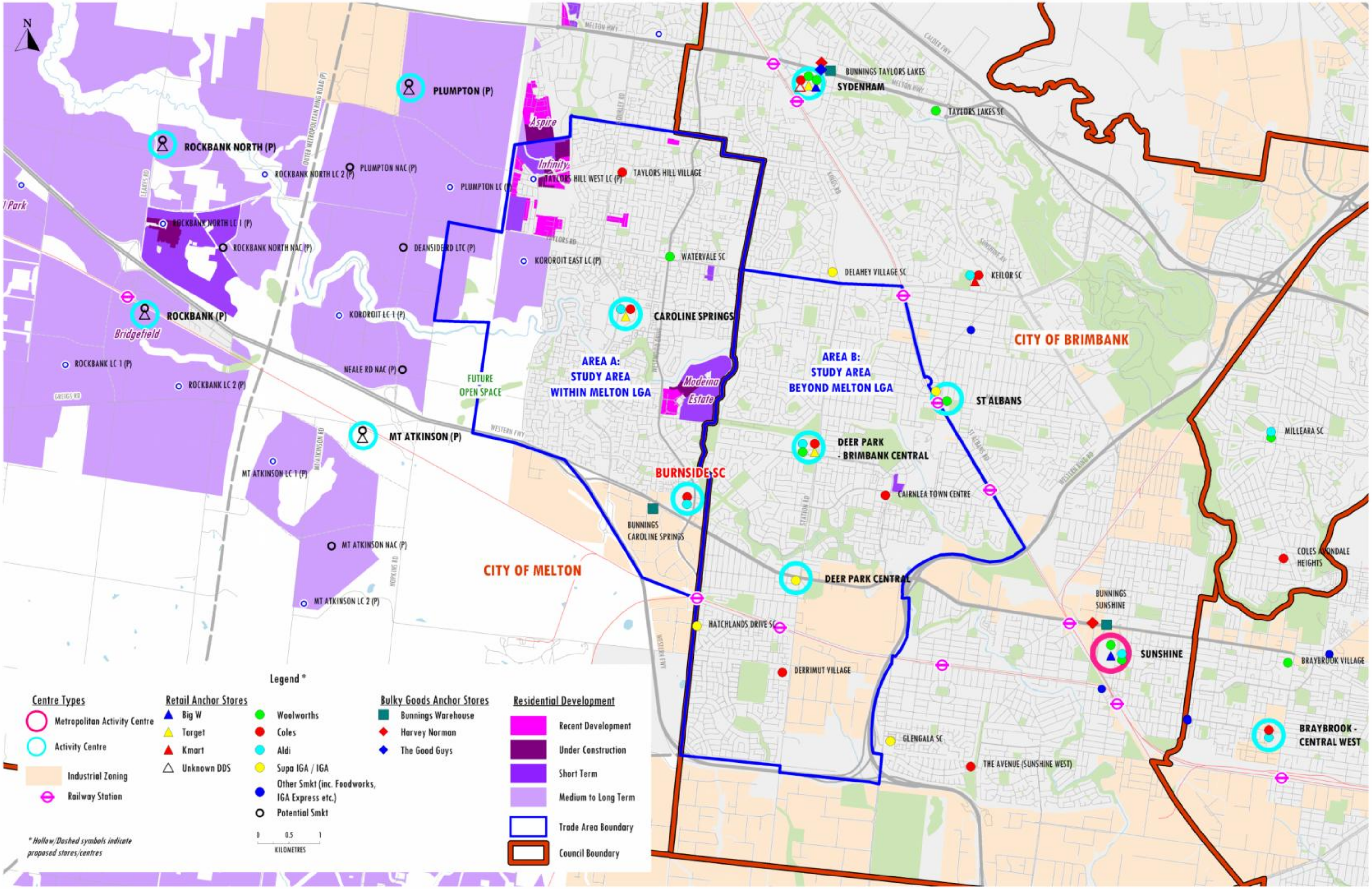
1.2 Burnside and the surrounding suburbs on Melbourne's north-western fringe have experienced very strong population growth over the last 20 years, as considerable residential development has occurred throughout this region. On a regional basis such population growth is forecast to continue well into the future.

1.3 For the purposes of my analysis I have defined a study area, in two parts, which is shown on the attached Map 1, which I consider to be the area of most relevance to an assessment of the need and demand for the future Burnside Activity Centre. This area falls partly within the City of Melton, and partly beyond the City of Melton (i.e. within the City of Brimbank) as a result of the fact that the Burnside Activity Centre site sits almost adjacent to the boundary between these two municipalities.

1.4 The Burnside Activity Centre is located on the western side of Westwood Drive, and on the northern side of the Western Highway, as shown on Map 1. The site has a high profile location, with the Western Highway being the major east-west arterial route through the rapidly growing western suburbs of Melbourne. The centre is therefore easily accessible for residents of the surrounding region.

1.5 Westwood Drive, the site's eastern boundary, is not yet completed, but will extend to link with Calder Park, and provides excellent north-south accessibility to the site. Over the longer term, this roadway (including Westwood Drive, Calder Park Drive, Robinson Road and Palmers Road) is proposed to become a six lane north-south arterial, extending from the Calder Freeway in the north through to Laverton in the south.

1.6 The Burnside Activity Centre is also located on the Principal Bus Network, which runs along the Western Highway, and is also the closest activity centre to the Caroline Springs train station.



Map 1: Burnside Study Area

MacroPlanDimasi

1.7 Burnside Activity Centre is, therefore, strategically located to effectively service the needs of the growing population in the surrounding region.

1.8 Development on the site at present comprises a small neighbourhood centre anchored by Coles and Aldi supermarkets, together with a now vacated Masters home improvement superstore, which is to be repurposed. The neighbourhood centre, called Burnside Hub, totals around 6,000 sq.m of GLA and contains 15 retail specialty stores and services, as well as non-retail facilities including a medical centre and real estate agent, while the former Masters premises is some 13,500 sq.m in size.

1.9 In addition, other facilities in the immediate precinct also draw customers from a broad regional catchment. Those facilities include a Bunnings home improvement superstore situated directly opposite the subject site, on the southern side of the Western Highway, and a homemaker/bulky goods precinct located immediately to the west of the Bunnings store, which includes tenants such as Officeworks, Fantastic Furniture and Furniture Galore. In addition, various car dealership showrooms are also situated on the southern side of the western highway, adjacent to the homemaker/bulky goods facilities.

1.10 The Burnside Activity Centre site therefore has a number of attributes, evident from the above description and also from the information shown on Map 1, which make it ideal to serve a much broader role than a neighbourhood activity centre. Those attributes include the following:

- A strategic major highway location, with frontage both to the highway and to a north-south major arterial that is to be created.
- Availability of site area – the total activity centre site is some 19 hectares in size – to create a significant mixed use activity centre.
- Extensive adjoining facilities (on the southern side of the Western Highway) which combine with the Burnside Activity Centre to create a broader precinct that serves a sub-regional role.
- A central location at the gateway to a major growth corridor of Melbourne.

Section 2: Burnside Activity Centre study area

2.1 A proper consideration of the future scale and role of the Burnside Activity Centre should have due regard for both the potential benefits, and any possible disbenefits, which might result from the provision of a wider range of retail facilities on the site. In this regard, it is also important to note that the amount of appropriately zoned land on the site already enables the activity centre to accommodate a much greater provision of retail floorspace than is provided within Burnside Hub.

2.2 To help determine the appropriate scale and composition of Burnside Activity Centre in the future, I have defined a relevant **study area**, as shown previously on Map 1.

2.3 The study area reflects the area of greatest relevance to Burnside Activity Centre, and the activity centre site is centrally situated within this defined study area. Furthermore, the three existing designated Activity Centres which are of most direct competitive relevance to Burnside Activity Centre are also included within the study area – Deer Park Central, Brimbank Central and Caroline Springs.

Study area population

2.4 Table 2.1 details the population level for the defined Burnside study area at each of the last two Census dates, as well as estimates for 2016 and estimated projections for future years. The table also shows the estimated capacity population for this area. The capacity population, expected to be reached by around 2031, has been derived by estimating the amount of land available within the area for residential development, and then adopting an assumed yield of 12 lots per hectare and an average household size of 3.

Table 2.1 Burnside Study Area - population, 2006-2031*							
	Estimated population				**Forecast population**		
Study area	2006	2011	2016	2018	2021	2026	2031
Area A: Within Melton LGA	24,250	42,990	50,990	53,290	56,290	60,040	63,540
Area B: Beyond Melton LGA	48,400	61,090	63,090	63,590	64,340	65,090	65,590
Total study area	**72,650**	**104,080**	**114,080**	**116,880**	**120,630**	**125,130**	**129,130**
		Average annual growth (no.)					
Study area		2006-11	2011-16	2016-18	2018-21	2021-26	2026-31
Area A: Within Melton LGA		3,748	1,600	1,150	1,000	750	700
Area B: Beyond Melton LGA		2,538	400	250	250	150	100
Total study area		**6,286**	**2,000**	**1,400**	**1,250**	**900**	**800**
		Average annual growth (%)					
Study area		2006-11	2011-16	2016-18	2018-21	2021-26	2026-31
Area A: Within Melton LGA		12.1%	3.5%	2.2%	1.8%	1.3%	1.1%
Area B: Beyond Melton LGA		4.8%	0.6%	0.4%	0.4%	0.2%	0.2%
Total study area		**7.5%**	**1.9%**	**1.2%**	**1.1%**	**0.7%**	**0.6%**

**As at June*
Source: ABS Census 2011; Victoria In Future 2016; Forecast.id; MacroPlan Dimasi

2.5 The population of the Burnside study area grew very rapidly over the inter-censal period from 2006 to 2011, averaging annual growth of 7.5%. At Census date in 2011, the population of the study area was 104,080. By June 2016, it had increased to an estimated 114,080. The estimated population capacity of the study area is around 129,000, having regard to the remaining land available for residential development.

2.6 The rate at which development might occur in the future to reach the estimated capacity population is not material to the matter of appropriate future scale and mix of the Burnside Activity Centre. Of much greater importance are:

- the current population within the relevant area, and
- the anticipated capacity population within that area.

2.7 The socio-demographic profile of the existing population within the Burnside study area is outlined in Table 2.2 and also in Chart 2.1 attached, and is based on the results of the 2011 Census of Population and Housing.

2.8 The results from the 2011 Census of Population and Housing show that within the study area, the population at that date was on average much younger than the overall Melbourne metropolitan population, and generally had lower than average per capita and per household income levels. However, Area A, being the part which falls within the City of Melton, has a high average household size but an above average household income level.

2.9 Further, the population has a higher than average proportion of overseas born residents, especially from Asian countries, with very high levels of home ownership, and a higher than average representation of traditional families comprising couples with dependent children, as well as couples with non-dependent children. In all regards this population exhibits a typical outer suburban, growth area profile.

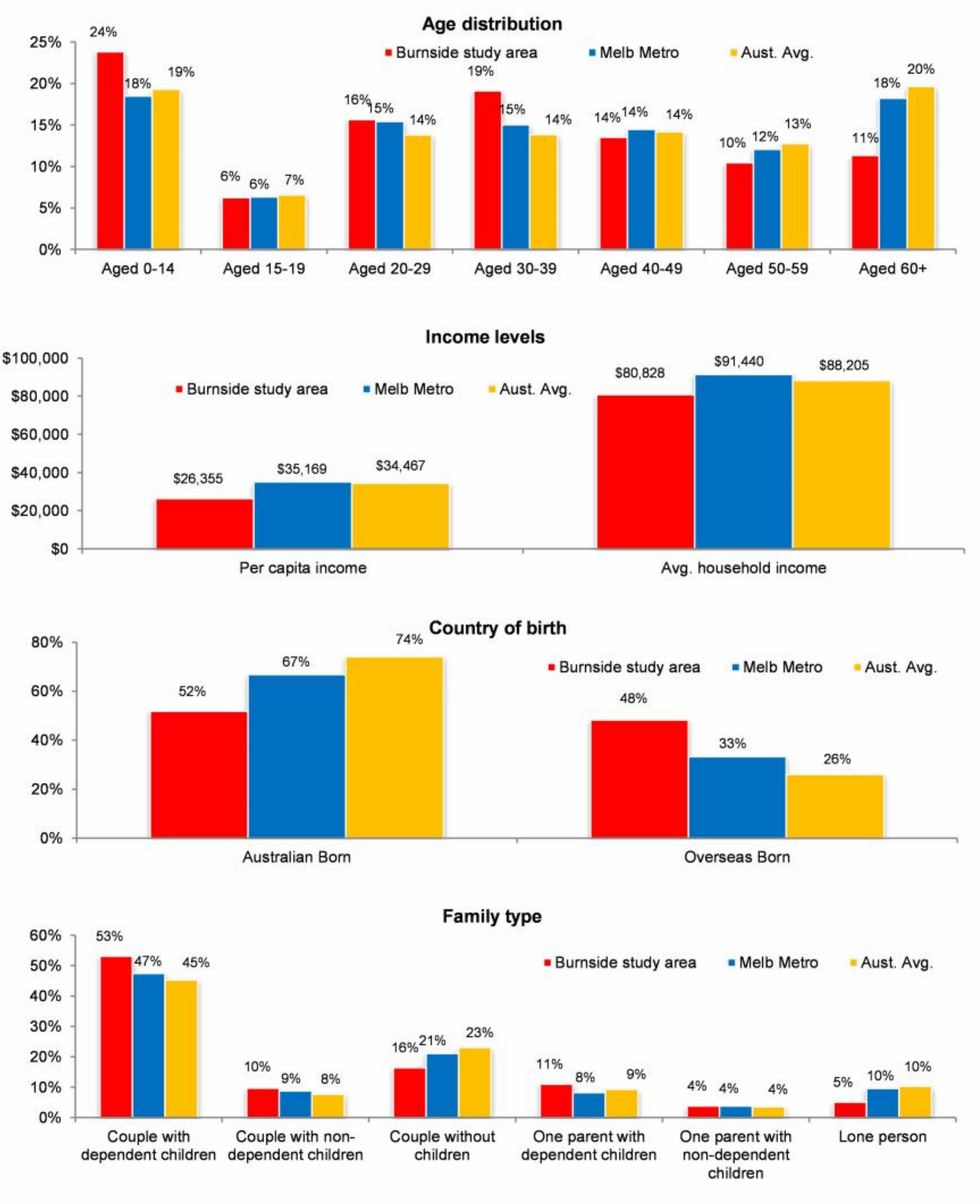
Table 2.2
Burnside Study Area - socio-demographic profile, 2011

Census item	Area A	Area B	Study Area	Melb Metro avg.	Aust. avg.
Per capita income	$30,116	$23,708	$26,355	$35,169	$34,467
Var. from Melb Metro	*-14.4%*	*-32.6%*	*-25.1%*		
Avg. household income	$95,381	$71,125	$80,828	$91,440	$88,205
Var. from Melb Metro	*4.3%*	*-22.2%*	*-11.6%*		
Avg. household size	3.2	3.0	3.1	2.6	2.6
Age distribution (% of population)					
Aged 0-14	27.8%	21.0%	23.8%	18.5%	19.3%
Aged 15-19	5.9%	6.4%	6.2%	6.3%	6.5%
Aged 20-29	13.8%	16.9%	15.6%	15.4%	13.8%
Aged 30-39	22.4%	16.7%	19.1%	15.0%	13.8%
Aged 40-49	14.4%	12.9%	13.5%	14.5%	14.2%
Aged 50-59	8.3%	11.9%	10.4%	12.1%	12.8%
Aged 60+	7.4%	14.1%	11.3%	18.2%	19.6%
Average age	30.0	34.3	32.5	37.3	37.9
Housing status (% of households)					
Owner (total)	82.7%	74.3%	77.8%	71.3%	68.7%
• Owner (outright)	16.4%	31.9%	25.5%	33.5%	32.9%
• Owner (with mortgage)	66.4%	42.4%	52.3%	37.7%	35.8%
Renter	15.9%	25.3%	21.4%	28.0%	30.4%
Other	1.3%	0.4%	0.8%	0.8%	0.9%
Birthplace (% of population)					
Australian born	60.5%	45.6%	51.8%	66.7%	74.0%
Overseas born	39.5%	54.4%	48.2%	33.3%	26.0%
• Asia	19.3%	27.8%	24.3%	13.4%	8.6%
• Europe	11.4%	16.6%	14.4%	12.7%	10.5%
• Other	8.9%	9.9%	9.5%	7.2%	7.0%
Family type (% of households)					
Couple with dep't children	63.6%	46.0%	53.1%	47.4%	45.3%
Couple with non-dep't child.	6.7%	11.5%	9.6%	8.7%	7.7%
Couple without children	15.1%	17.3%	16.4%	21.0%	23.0%
One parent with dep't child.	8.1%	12.9%	11.0%	8.2%	9.2%
One parent w non-dep't child.	2.1%	4.9%	3.8%	3.8%	3.5%
Other family	0.6%	1.5%	1.2%	1.3%	1.1%
Lone person	3.8%	5.8%	5.0%	9.6%	10.2%

Source: ABS Census of Population & Housing, 2011; MacroPlan Dimasi

Chart 2.1

Burnside Study Area - socio-demographic profile, 2011



Source: ABS Census of Population & Housing, 2011; MacroPlan Dimasi

Retail floorspace demand and supply within study area

2.10 For the purpose of presenting a broad supply and demand analysis for the defined study area, this report focuses on the provision of traditional retail floorspace, i.e. excluding large footprint homemaker/bulky goods space.

2.11 The current provision of retail floorspace within the defined Burnside study area is shown in Table 2.3 and is estimated at 98,900 sq.m, excluding homemaker/bulky goods space. This supply represents an average floorspace provision of around 0.9 sq.m per person, a figure which is well below the estimated national average of 1.5 – 1.6 sq.m per person, excluding bulky goods/homemaker centre space.

Table 2.3

Burnside Study Area - schedule of retail facilities (excluding homemaker facilities)

Centre	Retail GLA (sq.m)
Area A - within Melton LGA	
Caroline Springs	23,500
• CS Square	18,500
• Other town centre	5,000
Burnside SC	6,000
Watervale SC	5,300
Taylors Hill Village	7,800
Other	2,000
Area B - beyond Melton LGA	
Brimbank Central	32,000
Deer Park Central	6,500
Derrimut Village	6,000
Hatchlands Drive SC	2,500
Cairnlea Town Centre	5,800
Other	1,500
Total existing retail f'space	**98,900**

Source: Property Council of Australia; MacroPlan Dimasi

2.12 Of course retail expenditure for any area is not strictly confined within that area. There will be expenditure flows both into and out of the defined study area. Similarly, there is retail floorspace provided just outside the study area which is of some relevance to study area residents – in particular the St Albans centre, the Watervale neighbourhood centre and the Delahey Village neighbourhood centre.

2.13 On the other hand, some of the trade area or catchment of the Caroline Springs activity centre lies to the north of the defined study area boundary, while the highway location of the Burnside Activity Centre will mean that a high proportion of its business – in my view at least 25% – will be drawn from beyond this defined area.

2.14 In my view, therefore, the study area is reasonably defined, and the retail floorspace which is provided within the study area represents a reasonable measure of the level of supply which can be directly applied to that study area.

2.15 The additional retail floorspace that is required/can be supported in order to serve the population of the defined Burnside Study Area, in broad terms, can now be estimated. This additional space is/will be substantial, reflecting the current underprovision of floorspace and the additional population growth projected to occur throughout the area.

2.16 The estimated provision of retail floorspace throughout Australia at present is 2.2 – 2.3 sq.m per person, including bulky goods space, or about 1.5 – 1.6 sq.m excluding bulky goods space. That provision has historically increased steadily, typically by around 1% per annum on average over the past 30 or so years. This steady increase in retail floorspace per capita has reflected the development trends of the retail industry on the one hand, with new store types being introduced on an ongoing basis, and the increase in real incomes of the consumers, as well as their demands for an ever more diverse range of retail experiences, on the other. The extensive provision of bulky goods/homemaker floorspace for example, or the factory outlet space which is now readily apparent throughout most parts of Australia, did not exist a decade and a half ago. Similarly, large regional centres with in excess of 100,000 sq.m of retail floorspace (such as Chadstone, Highpoint, Westfield Southland, and Westfield Doncaster in

Melbourne) also were very rare, whereas now centres of 120,000+ sq.m are relatively commonplace. At the lower end of the hierarchy, the number of supermarket anchored neighbourhood centres has also increased enormously over the past 20 years.

2.17 There is a general consensus that the rate of growth in per capita retail floorspace demand for the foreseeable future will not match the rate achieved over the past three decades.

2.18 I agree in broad terms with this proposition. However, extensive analysis has been undertaken, both by MacroPlan Dimasi and others, of the implications for total retail floorspace demand of the continuing drift of some retail expenditure to online retailing. The bottom line is that while such drift will indeed impact on retail floorspace demand per capita, the extent of this transfer will not be dramatic, and more importantly, is already most of the way to where it is likely to finish up. In other words, the trend to online retailing has already played out to a large extent, with an estimated 7% of total retail sales in Australia now being directed to the online channel.

2.19 It is important to note that most of the retail dollar either cannot, or is highly unlikely to, be transferred to the online channel. Food catering expenditure, for example, which at present is the fastest growing 'online' retail category, cannot be transferred to online, other than ordering take-away food via the internet, which is simply replacement of previously ordering via the telephone. Similarly, Australians have shown themselves extremely reluctant to direct any significant proportion of their food and grocery expenditure to the online channel, with less than 1.5% of such expenditure going online to this point.

2.20 For a number of the other categories, such as music, books, and even fashion shopping, there has already been a very substantial shift to the online channel. Some of the reasons for that shift have already moderated over recent years, e.g. the weakening in the value of the Australian dollar compared with international currencies, and also the increasing presence of many of the retailers to which online expenditure was previously directed (such as Zara, Topshop, Apple and others) with bricks and mortar stores in Australia.

2.21 There are therefore many reasons why the impact of the drift to online shopping by the Australian population will continue to moderate, and to settle, in the near future, at a point where it will no longer be seen as a ‘threat’ to the ongoing development of bricks and mortar retail space. Indeed, that point might already have been reached.

2.22 In my assessment set out below I have taken a conservative approach and allowed for no growth in per capita retail floorspace demand for the foreseeable future.

2.23 On that basis, Table 2.4 details the indicative amount of supportable retail floorspace that will be required to meet the growing needs of the population of the Burnside study area, adopting a flat retail floorspace per capita guideline. Again, the analysis is focused on traditional retail floorspace, excluding bulky goods/homemaker floorspace.

Table 2.4

Burnside Study Area - retail floorspace supply and demand analysis

	Year			
Item	2016	2021	2026	2031
Study area population ('000)	**114.1**	**120.6**	**125.1**	**129.1**
Retail floorspace demand per capita				
Total floorspace demand (sq.m)	2.2	2.2	2.2	2.2
Less bulky goods f'space demand (sq.m)	0.6	0.6	0.6	0.6
Traditional retail f'space demand (sq.m)	1.6	1.6	1.6	1.6
Total supportable f'space (sq.m)	**182,500**	**193,000**	**200,200**	**206,600**
Study area existing retail f'space (sq.m)	98,900			
Known/mooted future addition f'space*				
CS Square		20,000		
Total proposed retail f'space (sq.m)		20,000		
Total retail f'space provision (sq.m)	**98,900**	**118,900**	**118,900**	**118,900**
Retail floorspace per capita (sq.m)	0.9	1.0	1.0	0.9
Study area over (+) / under (-) supply	**-83,600**	**-74,100**	**-81,300**	**-87,700**

** Not including potential Burnside SC expansion*

Source: MacroPlan Dimasi

2.24 The above analysis shows that:

- At present, the level of retail floorspace provided per capita within the study area is in the order of 0.9 sq.m. This is less than two-thirds the typical provision across major urban areas in Australia, although it is reasonable to expect that a proportion of the retail expenditure of study area residents will be directed to major retail facilities located outside the area – Highpoint SC and Watergardens Town Centre are the two most relevant examples.

- The estimated level of retail floorspace demand by the study area population at 2016 was 182,500 sq.m, or some 83,600 sq.m greater than the level of available supply within the area.

- By the time that the capacity population of the study area is reached, the estimated demand for retail floorspace generated by that population will be in the order of 206,000 sq.m.

- Allowing for an assumed expansion at CS Square of, say, 20,000 sq.m to occur before 2021, there would still be a very considerable undersupply of retail floorspace within the study area, estimated at around 74,000 sq.m by 2021, and 87,700 sq.m by the time that the capacity population of the study area is reached.

2.25 I am not suggesting that all of the retail floorspace demand generated by the study area population should necessarily be provided within the study area. As previously noted, some escape expenditure will always be directed to the larger, higher order centres located outside the area, in particular to Highpoint SC and Watergardens Town Centre.

2.26 There may well also be other retail facilities added within the study area, including, for example, at the Deer Park Central activity centre, and at a number of small local or neighbourhood centres still to be built, such as Taylors Hill West and Kororoit East.

2.27 However, the analysis in this section shows that there is already a significant undersupply of retail floorspace within the study area, and furthermore that the level of undersupply will continue to increase as the population of the study area continues to grow. A household survey of the study area, detailed in Section 3 following, confirms this view, with a significant level of dissatisfaction particularly evident with regards to the provision of non-food retail shopping alternatives available to these households. The household survey also showed that the bulk of the non-food retail expenditure of study area households is directed beyond the area at present, thereby highlighting the opportunity for an improved provision of shopping options within the study area, to the benefit of local households.

2.28 As detailed previously in this report, the Burnside Activity Centre site is ideally situated to serve some of the retail needs of this growing study area population, and it is therefore in the economic and social interests of the study area that the activity centre site be enabled to do so.

2.29 It is against this background that the appropriate future scale and mix of retail floorspace at Burnside Activity Centre should be determined.

Section 3: Community behaviours and views

3.1 I have previously been commissioned to conduct an independent survey of households throughout Burnside and the surrounding suburbs, by Ranfurlie Developments. Those surveys were undertaken in mid 2013, however, I consider that the findings are still relevant today, since there has been no change to the various shopping centres available throughout Burnside and the surrounding suburbs since that date.

3.2 The questionnaire utilised for the household survey is attached as Appendix 1 to this report, together with the tabulated results. The objectives of the questionnaire were to:

i. Establish the current shopping patterns of households throughout the suburbs of primary relevance to the Burnside Activity Centre.

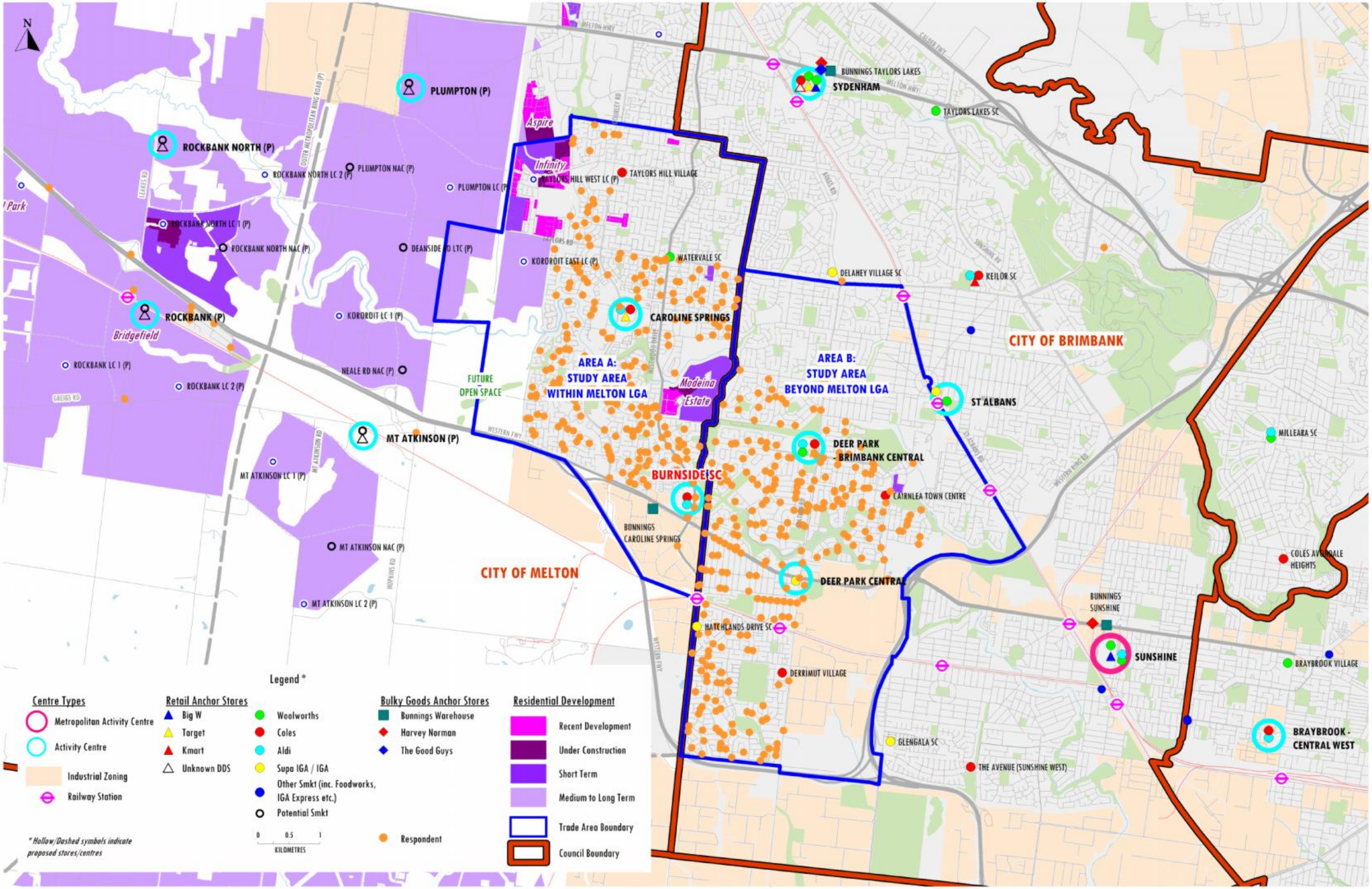
ii. Examine the general levels of satisfaction with the available shopping alternatives to residents of these suburbs.

iii. Examine the patterns of usage of the Burnside Hub SC.

iv. Examine the community views regarding possible expansion at Burnside Hub SC.

v. Examine the likely benefits, from the community viewpoint, of future expansion of Burnside Activity Centre.

3.3 The distribution of respondent households was designed to reflect the distribution of population across the eight suburbs, in order to provide a representative sample. A total of 650 respondent households were randomly selected for the survey, which was independently conducted by AFS over a 2-week period from 21 June to 3 July 2013. Map 2 shows the locations of the respondent households.



Map 2: Survey respondent addresses

3.4 A survey of 650 households is a very robust sample, and clearly provides important input into the consideration of the appropriate scale and range of facilities to be provided at the Burnside Activity Centre, as it represents the direct views of residents who live and shop in the area, not just at Burnside but also at other centres.

Key research findings

3.5 The main findings from the household survey are summarised below. The relevant tabular data are detailed in Appendix 2, as is the survey questionnaire.

Main centre used for food and grocery shopping

3.6 Burnside Hub is the third most important centre for food and grocery shopping across the eight suburbs surveyed, and the most important for residents of the suburb of Burnside. Table A1 in Appendix 2 summarises these findings, and also shows that:

- CS Square is the centre which is most often used as the main centre for food and grocery shopping, by 29% of respondent households.
- Brimbank Central is the main centre used as food and grocery shopping by 24% of households.
- Burnside Hub is the main centre used for 12% of respondent households.
- Derrimut Village is the main food and grocery shopping centre for 9% of respondent households.

Main reasons for using particular centres for food and grocery shopping

3.7 As summarised in Table A2 in Appendix 2, by far the major reason for selecting each particular centre which is used by respondent households for food and grocery shopping is its location relative to home. The second major reason is the product range and variety available, with the brand of supermarket available being the third. Other reasons are relatively unimportant.

Level of satisfaction with food and grocery shopping alternatives

3.8 Overall, respondent households are quite satisfied with the range of food and grocery shopping alternatives available to them. Table A3 shows that on average, the overall rating given to the food and grocery shopping alternatives was 7.4 out of 10, and the bulk of respondent households gave the range of alternatives available ratings of 7 or greater.

Non-food shopping alternatives

3.9 Table A4 shows the main centres used for non-food shopping by residents of each suburb and in total. Burnside Hub barely rates in this regard, with only 0.3% of the total sample using it as the main shopping centre for their non-food requirements. This result is not surprising given the current composition of the centre.

3.10 The most important centres used for non-food shopping are Watergardens Town Centre and Highpoint SC, which stand out as being the two most extensively used centres, being the main centre used for approximately 30% and 29% of respondent households respectively.

3.11 The third main centre used is Brimbank Central, for 17% of respondent households. The results show that CS Square is used as the main centre for non-food shopping by 7% of households across the eight suburbs, a relatively small proportion.

3.12 In addition to being asked to indicate their main centre used for non-food shopping, respondents were also asked to indicate which other centres they also use for non-food shopping. Table A5 shows the responses to this question, and highlights the fact that the 'other centres' used most frequently, if not used as 'main centre', are:

- Highpoint SC; and
- Watergardens Town Centre

These two centres are used almost three times as much as any other listed centre, with the next most popular centre being Brimbank Central.

3.13 This result highlights the fact that the bulk of non-food retail expenditure is flowing out of the area, and going primarily to Watergardens Town Centre and Highpoint SC.

Major non-food stores used

3.14 Table A6 shows the non-food anchor stores which are used most extensively for shopping by residents of the eight suburbs surveyed. The stores most used are:

- Target at CS Square
- Target at Brimbank Central
- Myer at Highpoint
- Big W at Watergardens

Main reasons for selecting preferred non-food shopping location

3.15 Table A7 shows the main reasons for selecting the preferred non-food shopping location. This table highlights the fact that whilst location near home is important, the available **range** and **variety** of products is almost equally important when selecting the non-food shopping destination. This finding is quite different to the selection of food and grocery shopping alternative, which as previously detailed is driven primarily by convenience.

Rating of non-food shopping alternatives

3.16 The average rating for the non-food shopping alternatives is noticeably lower than that given to the food and grocery shopping alternatives by respondent households. As shown in Table A8, the average rating out of 10 given across the range of non-food shopping alternatives is 6.9.

3.17 Importantly, 132 households or some 20% of the total sample rated the range of non-food shopping alternatives available to them at 5 or below, meaning a clearly unsatisfactory situation for those households. The main reasons given by those 132 households for such a rating are detailed in Table A9.

3.18 The primary reasons for dissatisfaction with non-food shopping alternatives available to them are:

- Lack of variety
- Limited range

Frequency of shopping at Burnside Hub

3.19 Respondent households were asked to indicate how frequently they shop at Burnside Hub SC. Table A10 summarises these results, highlighting the following:

- Across the eight suburbs, 14% of household indicated they shop at the centre 2 – 3 times per week or more often, with a further 12% indicating they shop there once a week. Therefore, more than a quarter of households use Burnside Hub at least once a week.

- A further 8% indicated that they shop at the centre at least once a fortnight, while another 15% indicated they shop there at least once a month.

3.20 In total, therefore, **almost half** of respondent households **(46.3%)** shop at Burnside Hub once a month or more frequently.

Community support for expansion of Burnside Hub

3.21 Respondent households were then asked for their views regarding a possible expansion of Burnside Hub which would extend both the existing food and convenience offer of the centre as well as provide a wider choice of stores particularly for non-food shopping, including clothing, footwear, homewares, sporting goods and gifts.

3.22 First, respondent households were asked whether, in terms of meeting their particular shopping needs and wants, such an expansion would be an improvement. The results are shown in Table A11.

3.23 Respondent households were overwhelmingly of the view that such expansion of Burnside Hub SC will represent an improvement to meeting their shopping needs and wants, with **almost 56%** of all households indicating it would be a **significant improvement**.

3.24 Next, respondent households were asked to indicate which stores they would like to see added to Burnside Hub if the centre were to be expanded. Table A12 shows the results.

3.25 The two discount department stores which are not represented within the area, namely Kmart and Big W, are by far the most popular additional stores requested to be added, by 45% and 38% of respondent households respective.

3.26 Finally, respondent households were asked for their specific views about a hypothetical expansion of Burnside Hub which could see both a Woolworths supermarket and a Big W discount department store added to the centre. In particular, they were asked the extent to which their frequency of use of Burnside Hub would change if such a change were to be made, and the results are shown in Table A13.

3.27 Almost half of respondent households **(49%)** indicated they would shop at Burnside Hub **a lot more frequently** if the centre were to be expanded in such a manner, with a further 29% indicating that they would shop there a little more frequently. Therefore, more than three-quarters of all households would use the centre more frequently if it were to be expanded in that manner.

3.28 Overall, the household survey results show the following:

- Burnside Hub is already used by a large number of households throughout the surrounding area, drawing business from suburbs including Burnside, Burnside Heights, Caroline Springs, Deer Park, Rockbank and Derrimut.

- Most of the non-food retail expenditure generated by residents of Burnside and the surrounding suburbs is currently directed to the larger regional centres situated outside the area, namely Highpoint SC and Watergardens Town Centre.

- There is a significant level of dissatisfaction with the non-food shopping alternatives available to residents of Burnside and the surrounding suburbs.
- There is a very high level of community support for further expansion of Burnside Hub, adding additional food and non-food shopping alternatives, and especially a Kmart or Big W discount department store.

Section 4: Economic benefits and disbenefits of proposal

4.1 A future expansion of Burnside Hub would result in a range of economic benefits. The key positive impacts would include the following:

- Increased choice and convenience for the growing population – The expanded and redeveloped Burnside Hub would offer a greater provision and wider range of shopping alternatives for residents of the surrounding region.

- Local employment – An expanded Burnside Hub will create a significant number of additional jobs in the region, both for the construction and related industries during the construction phase, and for the economy generally once the centre is completed. In broad terms, for every 10,000 sq.m of additional retail floorspace added to the centre, in the order of 350 on-site retail jobs are expected to be created, while multiplier effects throughout the broader economy would result in further employment opportunities. Similarly, for the construction of additional retail floorspace on the site in the order of 40 direct new jobs are estimated to be created for every $10 million of capital costs, with additional multiplier induced jobs also created throughout the broader economy.

- Economic growth – The effective utilisation of the large Burnside Activity Centre site, given its strategic location as detailed throughout this report, would contribute significantly to the economic growth of western Melbourne, and of Victoria generally.

- Retention of local expenditure – As noted previously in my analysis, the bulk of the non-food retail expenditure of residents of Burnside and the surrounding suburbs is currently directed to major centres located outside the area. By improving the shopping alternatives within the area, expenditure will be retained more locally, reducing the need for residents to travel outside the area. This in turn would contribute to a reduction in the use of transport resources, particularly as the

Burnside Activity Centre is already being used on a regular basis by a high proportion of residents of the study area.

4.2 There will therefore be a range of significant economic and social benefits that would result from further expansion of the Burnside Activity Centre to enable a more extensive provision of retail facilities on site. Given the information presented in this report, it is hard to argue that there are any significant identifiable disbenefits. In coming to this conclusion, the following is of particular relevance:

- First, the results of the household surveys, which reflect the current behaviours, preferences and views of residents of the subject area. These results highlight the following conclusions:
  - There is significant element of dissatisfaction amongst a proportion of households with regard to non-food shopping alternatives available to them.
  - The bulk of the non-food retail expenditure of these households is currently escaping from the area, to the larger regional centres which are situated some distance away, in particular Highpoint SC.
  - There is a strong preference for both Kmart and Big W discount department store to be added to the area.
  - By implication, the likely impacts of further expansion of Burnside Hub would be felt most keenly not by other centres located within the study area (e.g. Caroline Springs, which does not feature extensively as a non-food shopping destination for study area households) but rather by these major centres located outside the area. Those centres are in turn able to draw their business from very extensive and growing regions, and certainly their future is in no way under threat from any further expansion of Burnside Hub.

- Within the study area at present there is only one discount department store operator represented – Target, at both Brimbank Central and CS Square. Kmart has previously vacated Brimbank Central, so it can be concluded that it will not return there. Similarly, it can reasonably be concluded that Big W would not locate at that centre.

- Since the date of the household surveys in the Burnside Study Area (2013) the retail industry in Australia has undergone some noticeable changes, with one of the key outcomes being a significantly reduced appetite by two of the three available discount department store operators (Target and Big W) to open new stores. Kmart on the other hand has increased its desire for new store openings.

- At the same time, new international retailers have moved into the so-called ‘fast fashion’ category, including Zara, H&M and Uniqlo.

- In addition, the role of food, particularly food & beverage, has increased enormously in shopping centres of all designations, but particularly higher order centres. An increasing emphasis is also evident in leisure and entertainment uses, including cinema visitation and associated dining.

- Given recent retail trends, the question of future growth for centres which are already at a ‘sub-regional’ scale (such as Caroline Springs) or centres which are aspiring to reach sub-regional scale (in this case Burnside) is no longer as simple as gaining a discount department store. In essence, the role and importance of discount department stores in the traditional trajectory of taking centres from neighbourhood level to sub-regional level has diminished over the past five or so years, and in my view will continue to diminish in the future. Retailing is essentially becoming more complex than simply adding discount department stores.

- That being the case, consumer expectations around what is required for a centre to operate as an activity centre, rather than a neighbourhood centre, have already begun to change, and will evolve further in the future. A range of new mini-major stores, including potentially some of the new/recent international arrivals (H&M, for example, has indicated a willingness to locate at many more sites than was originally expected) could result in a centre such as Caroline Springs continuing to expand and improve its role through further growth which does not require a second discount department store, while Burnside could potentially add, say, Kmart and achieve the first stage of its role as an activity centre in that fashion.

- From the point of view of the study area residents, the results of an outcome of this nature would be win/win. Residents can potentially be provided with more extensive ranges of non-food shopping alternatives at both CS Square and Burnside Activity Centre, meaning a reduced need to travel to the larger activity centres situated outside the area, although there will always be some leakage to those centres, due to their sizes and range of offers. However, the extent of such leakage can be reduced, and the study area would benefit in a number of important ways from such reduction.

Section 5: Summary of key conclusions

The key conclusions I draw from the analysis in this report are as follows:

5.1 Burnside Activity Centre is situated within Melbourne's north-western growth corridor, which has experienced very strong population growth over the past 15 years. The broad region is forecast to continue to grow strongly into the future.

5.2 The centre is strategically located at the north-western corner of Westwood Drive and the Western Highway. The centre, therefore, has a very high profile location, with the Western Highway being the major east-west arterial route through Melbourne's rapidly growing western suburbs. In addition, north-south accessibility to the centre is excellent and will be further improved, with the planned extension/integration of Westwood Drive to effectively link with Calder Park Drive to the north and Palmers Road in the south.

5.3 Analysis of retail floorspace supply and demand for the relevant study area which applies to the Burnside Activity Centre shows that there is currently a significant level of underprovision of retail floorspace, and that the level of underprovision will increase substantially in the future with further population growth. Expansion of the retail offer at the Burnside Activity Centre would help to meet some of this shortfall in shopping alternatives.

5.4 Independent surveys of households throughout Burnside and the surrounding suburbs have shown that Burnside Hub is already used by a large number of households; that most of the non-food retail expenditure generated by residents of the surrounding suburbs is currently directed to the larger regional centres situated outside the area; that there is a significant level of dissatisfaction with the non-food shopping alternatives that are available to local residents; and that there is a very high level of community support for further expansion of Burnside Hub.

5.5 The further expansion of Burnside Activity Centre would generate substantial economic benefits, including increased choice and convenience for the growing population; a substantial amount of local employment; economic growth for western Melbourne and for Victoria; and contribution to economic sustainability through reduced use of transport resources.

Appendix 1

Tony Dimasi | Managing Director

Retail

Tony studied economics, mathematics and statistical methods at the University of Melbourne where he graduated with a Bachelor of Arts (Hons.) degree and a Masters degree, completed in 1982. He also taught economics and statistical methods at the University for 3 years, before commencing work in the field of activity centre analysis, as well as related economic research, in 1982.

Since 1982 he has undertaken, and continues to undertake, independent research on behalf of retailers, shopping centre owners and managers, property developers, government and statutory authorities, as well as a wide range of other clients. The research includes both supply and demand analysis, as well as extensive customer research, investigating customer behaviour, motivations and preferences with regard to shopping and activity centre uses.

Tony has worked across all parts of Australia and New Zealand, and has provided advice in relation to virtually every significant activity centre location in both countries. The range of projects has included CBD properties; super regional centres; regional and sub-regional centres; district and neighbourhood centres; homemaker retail facilities; freestanding stores; and all other retail formats, as well as commercial and industrial precincts.

Tony has also advised extensively on optimal retail and related services provisions to support major education and health facilities, including universities and hospital/health precincts.

Tony appears regularly as an independent expert in state planning courts and tribunals across all states of Australia and in New Zealand, including:

1. The Administrative Appeals Tribunal (AAT) of Australia;
2. Independent Ministerial Panels and VCAT in Victoria;
3. The Land and Environment Court of New South Wales;
4. The Planning and Environment Court of Queensland;
5. The State Administrative Tribunal in Western Australia;
6. The Environment, Resources and Development Court of South Australia;
7. The Liquor Licensing Court of South Australia;
8. The Petroleum Products Retail Outlets Board of South Australia;
9. The Resource Development Planning Commission in Tasmania; and
10. The Environment Court of New Zealand.

He has also appeared regularly as an independent expert in federal parliamentary inquiries, including the Joint Parliamentary Inquiry into the Australian Retail Sector (Baird Inquiry); in ACCC hearings, including the Inquiry into the Competitiveness of Retail Prices for Standard Groceries in 2008; as well as Federal and County Court hearings.

He is also a regular conference speaker and columnist in retail industry publications.

Qualifications

1 Bachelor of Arts (Hons.), University of Melbourne

2 Master of Arts, University of Melbourne

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Appendix 2

TERMINATIONS

REFUSAL - MALES	
REFUSAL - FEMALES	

BURNSIDE HUB TELEPHONE SURVEY

Good morning/afternoon/evening. My name is ..... from ..... market research. We are conducting a short survey about people's shopping patterns. May I speak with the person in this household who is 18 years and over, and who is usually responsible for the majority of the household's shopping. IF NOT AVAILABLE, ARRANGE TO CALL BACK.

SAY IF NECESSARY:

Your number has been randomly selected from the electronic white pages. [DO NOT REVEAL CLIENT NAME]**.**

IF CUSTOMER INSISTS ON CLIENT NAME, SAY:

At the end of this survey and in accordance with Privacy Guidelines, we will reveal the name of our client on whose behalf we are conducting this research.

S.1 **To make sure we have a good cross-section of people, would you tell me which suburb you live in.** INTERVIEWER RECORD SUBURB. CHECK QUOTAS. QUOTAS DETERMINED BY RESPONSE TO THIS QUESTION. QUOTA DEFINITIONS WILL BE FORWARDED TO DP. IF OUTSIDE AREA, TERMINATE. (Thank you for your time and assistance, but we are looking for people outside your area.)

ALBANVALE
BURNSIDE
BURNSIDE HEIGHTS
CAROLINE SPRINGS
CAIRNLEA
DEER PARK
DERRIMUT
ROCKBANK

Suburb	Quotas
Albanvale	50
Burnside	50
Burnside Heights	50
Caroline Springs	185
Cairnlea	85
Deer Park	155
Derrimut	60
Rockbank	15
Total	**650**

Q.1(a) **Which shopping centre or location do you currently use most frequently for your normal <u>food and grocery</u> shopping? This is your weekly, fortnightly or even monthly food and grocery shopping.** DO NOT PROMPT. SINGLE RESPONSE.

Q.1(b) **Which other centres or locations do you also use for your food and grocery shopping? Any others?** MULTIPLE RESPONSES ACCEPTED. PROBE FULLY. DO NOT PROMPT.

	Q.1(a) **MAIN**	Q.1(b) **OTHERS**
BRIMBANK CENTRAL (Station Rd)	01	01
BURNSIDE SC / HUB (COLES, ALDI)	02	02
CAIRNLEA SC (COLES)	03	03
CENTRO KEILOR (Taylors Rd)	04	04
CS SQUARE (CAROLINE SPRINGS)	05	05
DEER PARK SHOPS (SUPA IGA)	06	06
DELAHEY VILLAGE (SUPA IGA)	07	07
DERRIMUT VILLAGE (COLES)	08	08
HATCHLANDS DRIVE SC (IGA)	09	09
MELTON (incl. HIGH ST, WOODGROVE and COBURNS)	10	10
ST ALBANS (SAFEWAY, SUPA IGA, MARKET)	11	11
SUNSHINE (incl. MARKETPLACE, PLAZA and OTHER)	12	12
TAYLORS HILL VILLAGE (COLES)	13	13
WATERGARDENS TOWN CENTRE	14	14
WATERVALE SC (WOOLWORTHS)	15	15
COSTCO (Footscray Rd, DOCKLANDS)	16	16
OTHER (PLEASE SPECIFY)	17	17
NO OTHER	NA	30

Q.2 **What are the <u>two main reasons</u> for** [INSERT NAME OF CENTRE AT Q.1a] **being your preferred choice for your normal food and grocery shopping?** MULTIPLE RESPONSE. RECORD UP TO TWO RESPONSES. DO NOT PROMPT

LOCATION NEAR HOME	01
LOCATION NEAR WORK	02
BRAND OF SUPERMARKET	03
GENERAL PRICE OF PRODUCTS	04
GOOD CARPARKING	05
PRODUCT RANGE/ VARIETY	06
FRESH FOOD OFFER	07
CUSTOMER SERVICE	08
OTHER (SPECIFY __________)	09
DON'T KNOW/ NO PARTICULAR REASON	30

Q.3 **On a scale of 1 to 10, where 1 is extremely poor and 10 is outstanding, how would you rate the existing shopping alternatives in your area (i.e. Caroline Springs town centre, Burnside Shopping Centre/Hub, Brimbank Central, Cairnlea SC, Watervale Shopping Centre, Taylors Hill Village, Deer Park Central, Hatchland's Drive SC and Derrimut Village) with respect to meeting your needs for your usual food and grocery shopping?** SINGLE RESPONSE.

EXTREMELY POOR	01
	02
	03
	04
	05
	06
	07
	08
	09
OUTSTANDING	10
DON'T KNOW	11

ASK FOR THOSE WHO RATED EXISTING ALTERNATIVES IN Q.3 AS 1 – 5, OTHERWISE SKIP TO Q.5

Q.4 **What are the two main reasons why you feel that the existing shopping alternatives in your local area do not effectively meet your needs for your normal food and grocery shopping?** MULTIPLE RESPONSE. ALLOW UP TO TWO RESPONSES.

TOO FAR TO TRAVEL	01
TOO EXPENSIVE	02
PREFER WOOLWORTHS	03
PREFER COLES	04
PREFER ALDI	05
PREFER OTHER SUPERMARKET (E.G. IGA, FOODWORKS)	06
POOR CAR PARKING	07
NOT ENOUGH VARIETY AND RANGE/ TOO SMALL	08
DISLIKE FRESH FOOD OFFER	09
POOR CUSTOMER SERVICE	10
OTHER (PLEASE SPECIFY)	11
DON'T KNOW/ NO PARTICULAR REASON	30

Q.5(a) **Which shopping centre or location do you currently use most frequently for your <u>non-food</u> shopping? This is shopping for items such as clothing, footwear, accessories, gifts, homewares, sporting goods, etc.** DO NOT PROMPT. SINGLE RESPONSE.

Q.5(b) **Which other centres or locations do you also use for your non-food shopping? Any others?** MULTIPLE RESPONSES ACCEPTED. PROBE FULLY. DO NOT PROMPT.

	Q.5(a) **MAIN**	Q.5(b) **OTHERS**
BRIMBANK CENTRAL (Station Rd)	01	01
BURNSIDE SC / HUB (Westwood Dr)	02	02
CAIRNLEA SC (Furlong Rd)	03	03
CENTRO KEILOR (Taylors Rd)	04	04
CS SQUARE (CAROLINE SPRINGS)	05	05
DEER PARK SHOPS (Cnr Station & Ballarat Rds)	06	06
DELAHEY VILLAGE (Cnr Kings & Taylors Rds)	07	07
DERRIMUT VILLAGE (Cnr Foleys & Mt Derrimut Rds)	08	08
HATCHLANDS DRIVE SC	09	09
MELTON SHOPS / WOODGROVE (High St, Coburns Rd)	10	10
ST ALBANS SHOPS (near station)	11	11
SUNSHINE MARKETPLACE / PLAZA (Hampshire Rd)	12	12
TAYLORS HILL VILLAGE (Gourlay Rd)	13	13
WATERGARDENS TOWN CENTRE (Cnr Kings Rd & Melton Hwy)	14	14
WATERVALE SC (Cnr Taylors Rd & Calder Park Dr)	15	15
COSTCO (Footscray Rd, DOCKLANDS)	16	16
CITY (MELBOURNE CBD)	17	17
HIGHPOINT SC	18	18
OTHER (PLEASE SPECIFY)	19	19
NO OTHER	NA	30

Q.6(a) **Which major department store or discount department store (Myer, David Jones, K mart, Target, Big W or Harris Scarfe) do you currently use most often for your non-food shopping?** DO NOT PROMPT. SINGLE RESPONSE.

Q.6(b) **Which other major stores do you also use on a regular basis for non-food shopping? Any others?** MULTIPLE RESPONSES ACCEPTED. PROBE FULLY. DO NOT PROMPT.

	Q.6(a) **MAIN**	Q.6(b) **OTHERS**
DON'T HAVE ONE MAIN STORE	01	N/A
TARGET – BRIMBANK CENTRAL (Station Rd)	02	02
TARGET – CS SQUARE (CAROLINE SPRINGS)	03	03
TARGET – WATERGARDENS (Cnr Kings Rd & Melton Hwy)	04	04
BIG W – SUNSHINE (Marketplace, Hampshire Rd)	05	05
BIG W – WATERGARDENS (Cnr Kings Rd & Melton Hwy)	06	06
KMART – CENTRO KEILOR (Taylors Rd)	07	07
MYER – HIGHPOINT	08	08
MYER – BOURKE ST MELBOURNE	09	09
DAVID JONES – HIGHPOINT	10	10
DAVID JONES – BOURKE ST MELBOURNE	11	11
COSTCO – DOCKLANDS (Footscray Rd)	12	12
OTHER (PLEASE SPECIFY)	13	13
NO OTHER	N/A	30

Q.7 **What are the <u>two main reasons</u> for** [INSERT NAME OF CENTRE AT Q.5a] **being your preferred choice for your normal non-food shopping?** MULTIPLE RESPONSE. RECORD UP TO TWO RESPONSES. DO NOT PROMPT

LOCATION NEAR HOME	01
LOCATION NEAR WORK	02
BRAND OF STORE	03
GENERAL PRICE OF PRODUCTS	04
GOOD CARPARKING	05
PRODUCT RANGE / VARIETY	06
FASHION OFFER / BRANDS	07
HOMEWARES OFFER / BRANDS	08
CUSTOMER SERVICE	09
OTHER (SPECIFY __________)	10
DON'T KNOW/ NO PARTICULAR REASON	30

Q.8 **On a scale of 1 to 10, where 1 is extremely poor and 10 is outstanding, how would you rate the existing shopping alternatives in your area (i.e. Caroline Springs town centre, Burnside Shopping Centre/Hub, Brimbank Central, Cairnlea SC, Watervale Shopping Centre, Taylors Hill Village, Deer Park Central, Hatchland's Drive SC and Derrimut Village) with respect to meeting your non-food shopping needs?** SINGLE RESPONSE.

EXTREMELY POOR	01
	02
	03
	04
	05
	06
	07
	08
	09
OUTSTANDING	10
DON'T KNOW	11

ASK FOR THOSE WHO RATED EXISTING NON-FOOD OFFER IN Q.8 AS 1 – 5, OTHERWISE SKIP TO Q.10

Q.9 **What are the two main reasons as to why you feel that the existing non-food retail offer in your local area does not effectively meet your non-food shopping needs?** MULTIPLE RESPONSE. ALLOW UP TO TWO RESPONSES.

LIMITED RANGE	01
TOO EXPENSIVE	02
PREFER BIG W	03
PREFER KMART	04
PREFER TARGET	05
PREFER DEPARTMENT STORE (E.G. MYER, DAVID JONES)	06
POOR CAR PARKING	07
NOT ENOUGH VARIETY / TOO SMALL	08
DISLIKE FASHION OFFER	09
DISLIKE HOMEWARES OFFER	10
POOR CUSTOMER SERVICE	11
OTHER (PLEASE SPECIFY)	12
DON'T KNOW/ NO PARTICULAR REASON	30

We'd now like to ask you some questions about Burnside Shopping Centre or Burnside Hub as it's now called. It's the centre on Westwood Drive, located near the new Masters store on Ballarat Rd in Burnside. Coles and Aldi supermarkets are the major retailers at the centre.

Q10 **About how often do you shop at Burnside Hub Shopping Centre?**

2-3 times a week (or more)	Once a week	Once a fortnight	Once a month	Every 2-3 months	Once every 6 months or so	Less than every 6 months / never

---

Q11 **The owners of Burnside Hub Shopping Centre are exploring the possibility of expanding the centre. The expansion would improve on the existing food and convenience offer of the centre, as well as provide a wider choice of stores particularly for non-food shopping, including clothing, footwear, homewares, sporting goods and gifts.**

For you personally, in terms of your shopping needs and wants, would such an expansion be:

A significant improvement	A small improvement	No different	A little worse	A lot worse

Q12 **If Burnside Hub Shopping Centre was to be expanded, which stores would you like to see added to make the centre most attractive for you?** ALLOW UP TO THREE SUGGESTIONS

ALDI	01
BIG W	02
COLES	03
COSTCO	04
DAVID JONES	05
KMART	06
MYER	07
TARGET	08
WOOLWORTHS	09
ZARA	10
OTHER (Specify)	11

Other suggestion 1: ____

Other suggestion 2: ____

Other suggestion 3: ____

Q13 **If a Big W discount department store and a new Woolworths supermarket were added at Burnside Hub Shopping Centre, plus additional specialty shops, services and carparking, would you be likely to shop at the centre:**

A lot more frequently	A little more frequently	About the same	A little less frequently	A lot less frequently

DEMOGRAPHICS

Finally, some quick questions about you so that we can check the cross-section of people we have spoken to.

Q.14(a) **Which of the following categories best describes your family situation? Are you single or in a couple?**

SINGLE	1
COUPLE	2

Q.14(b) **And are you……** READ OUT APPROPRIATE CODES.

SINGLE LIVING AT HOME	01
SINGLE LIVING WITH FRIENDS OR OTHER ADULTS	02
SINGLE WITH CHILDREN LIVING AT HOME	03
SINGLE PARENT WITH CHILDREN LIVING AWAY FROM HOME	04
COUPLE, NO CHILDREN	05
COUPLE LIVING WITH CHILDREN MAINLY UNDER 6 YEARS	06
COUPLE LIVING WITH CHILDREN MAINLY 6-12 YEARS	07
COUPLE LIVING WITH CHILDREN MAINLY 12-18 YEARS	08
COUPLE LIVING WITH CHILDREN MAINLY 18+ YEARS	09
COUPLE WITH ALL CHILDREN LIVING AWAY FROM HOME	10
OTHER (PLEASE SPECIFY)	11
REFUSED	20

Q.15 **Which of the following age categories are you in? Please stop me when I reach the one you are in.** READ OUT. RECORD SINGLE RESPONSE.

18-24 YEARS	01
25-29 YEARS	02
30-34 YEARS	03
35-44 YEARS	04
45-54 YEARS	05
55-59 YEARS	06
60-64 YEARS	07
65+	08
REFUSED	09

Q.16 **Record sex of respondent.** DO NOT ASK.

MALE	01
FEMALE	02

Q.17 **So we can get an accurate picture of how far shoppers travel, could you please give me the street name in which you live. I do not need the house number.** INTERVIEWERS MUST SPELL ALL ADDRESS DETAILS BACK TO RESPONDENT. ENSURE THAT YOU ACCURATELY RECORD STREET/ ROAD/ AVENUE ETC.

STREET NAME: ____

SUBURB NAME (RECORD AUTOMATICALLY FROM S.1):___________________________

Can you give me the name of the street that crosses [STREET NAME] **closest to your house?**

NAME OF NEAREST INTERSECTING STREET: ___________________________

[RECORD NAME OF NEAREST INTERSECTING STREET. CHECK SPELLING OF STREETS].

CHECK - ASK RESPONDENT: **And do the two streets you have mentioned** [READ BACK STREET NAME RESPONDENT LIVES ON AND NEAREST STREET] **intersect with each other to form a street corner?** [IF NO, RE-ASK FOR NEAREST CROSS STREET].

This concludes the survey. As this is market research, it is carried out in compliance with the Privacy Act and the information you provided will be used only for research purposes.

IF ASKED ABOUT CLIENT: **The client that we are conducting this research on behalf of is MacroPlan Dimasi.**

SAY TO ALL:
Thank you very much for your help.

Table A1

Main centre used for food and grocery shopping

(% of respondent households)

Suburb/Centre	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
Brimbank Central (Station Rd)	87%	7%	2%	39%	2%	53%	14%	0%	**24%**
Burnside Sc / Hub (Coles, Aldi)	0%	47%	8%	0%	10%	12%	5%	13%	**12%**
Cairnlea Sc (Coles)	0%	2%	4%	41%	3%	3%	2%	0%	**7%**
Centro Keilor (Taylors Rd)	0%	2%	0%	0%	0%	0%	0%	0%	**0%**
Costco (Footscray Rd, Docklands)	0%	0%	2%	0%	0%	0%	0%	0%	**0%**
Cs Square (Caroline Springs)	0%	31%	50%	1%	71%	2%	0%	13%	**29%**
Deer Park Shops (Supa Iga)	7%	5%	0%	8%	1%	14%	3%	0%	**6%**
Delahey Village (Supa Iga)	0%	2%	0%	0%	0%	0%	0%	0%	**0%**
Derrimut Village (Coles)	0%	0%	0%	0%	0%	10%	63%	0%	**9%**
Hatchlands Drive Sc (Iga)	0%	0%	2%	0%	0%	0%	0%	0%	**0%**
Highpoint Shopping Centre	0%	0%	2%	0%	0%	0%	2%	0%	**0%**
Melton (Incl. High St, Woodgrove And Coburns)	0%	0%	0%	0%	0%	0%	0%	60%	**1%**
St Albans (Safeway, Supa Iga, Market)	3%	0%	0%	5%	1%	0%	0%	0%	**1%**
Sunshine (Incl. Marketplace, Plaza And Other)	0%	4%	0%	5%	1%	4%	8%	0%	**3%**
Taylors Hill Village (Coles)	0%	0%	4%	0%	6%	0%	0%	7%	**2%**
Watergardens Town Centre	3%	0%	8%	0%	3%	2%	2%	7%	**2%**
Watervale Sc (Woolworths)	0%	0%	16%	0%	3%	0%	0%	0%	**2%**
Other	0%	0%	0%	0%	0%	1%	3%	0%	**0%**
No Other	0%	0%	2%	0%	0%	0%	0%	0%	**0%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi

Table A2

Main reasons for using each particular centre for food and grocery shopping

(% of respondent households)

Suburb/Reason	**Albanvale**	**Burnside**	**Burnside Heights**	**Cairnlea**	**Caroline Springs**	**Deer Park**	**Derrimut**	**Rockbank**	**Grand Total**
Location Near Home	83%	71%	68%	76%	81%	78%	74%	73%	**77%**
Product Range/Variety	30%	33%	32%	24%	38%	31%	18%	20%	**31%**
Brand Of Supermarket	7%	15%	12%	12%	16%	20%	15%	0%	**15%**
General Price Of Products	3%	5%	2%	11%	6%	7%	8%	0%	**6%**
Good Carparking	0%	0%	10%	5%	6%	5%	3%	0%	**5%**
Fresh Food Offer	3%	0%	10%	3%	6%	5%	0%	7%	**4%**
Location Near Work	7%	4%	8%	0%	3%	3%	5%	13%	**4%**
Customer Service	0%	2%	4%	0%	3%	4%	3%	0%	**3%**
Other	0%	0%	4%	4%	3%	3%	2%	7%	**3%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Multiple responses allowed; percentages for each category are calculated over the total number of respondents by sector*

Source: MacroPlan Dimasi

Table A3

Level of satisfaction with food and grocery shopping alternatives

(% of respondent households)

Suburb/Rating	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
10-Outstanding	17%	9%	16%	9%	7%	15%	15%	7%	**11%**
9	10%	15%	12%	11%	9%	12%	6%	13%	**10%**
8	30%	25%	36%	43%	39%	26%	20%	40%	**33%**
7	13%	22%	18%	15%	21%	19%	22%	7%	**19%**
6	3%	7%	6%	11%	11%	10%	12%	13%	**10%**
5	13%	13%	6%	7%	8%	7%	9%	13%	**8%**
4	7%	7%	2%	0%	3%	3%	3%	7%	**3%**
3	0%	0%	0%	1%	1%	2%	5%	0%	**1%**
2	0%	2%	0%	0%	0%	1%	2%	0%	**0%**
01-Extremely Poor	0%	0%	0%	0%	1%	1%	2%	0%	**1%**
Dont Know	7%	0%	4%	4%	1%	5%	5%	0%	**3%**
Average Rating (out of 10)	**7.54**	**7.18**	**7.88**	**7.65**	**7.33**	**7.43**	**7.03**	**7.27**	**7.4**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi

Table A4

Main centre used for non-food shopping

(% of respondent households)

Suburb/Centre	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
Brimbank Central (Station Rd)	37%	13%	2%	20%	4%	30%	23%	7%	**17%**
Burnside Sc / Hub (Westwood Dr)	0%	0%	2%	0%	0%	1%	0%	0%	**0%**
Cairnlea Sc (Furlong Rd)	0%	2%	0%	4%	0%	0%	0%	0%	**1%**
Centro Keilor (Taylors Rd)	3%	0%	0%	0%	0%	1%	0%	0%	**0%**
Chadstone Shopping Centre	0%	0%	0%	0%	1%	0%	0%	0%	**0%**
City (Melbourne Cbd)	0%	2%	2%	4%	3%	3%	2%	7%	**3%**
Cs Square (Caroline Springs)	0%	18%	14%	0%	12%	1%	3%	7%	**7%**
Deer Park Shops (Cnr Station & Ballarat Rds)	3%	4%	0%	7%	1%	11%	5%	0%	**5%**
Derrimut Village (Cnr Foleys & Mt Derrimut Rds)	0%	0%	0%	0%	0%	1%	0%	0%	**0%**
Essendon Fields	3%	0%	2%	0%	1%	1%	0%	0%	**1%**
Highpoint Sc	23%	29%	18%	44%	28%	25%	38%	0%	**29%**
Melton Shops / Woodgrove (High St, Coburns Rd)	0%	0%	0%	0%	0%	0%	0%	53%	**1%**
Sunshine Marketplace / Plaza (Hampshire Rd)	0%	4%	4%	4%	2%	8%	6%	0%	**4%**
Taylors Hill Village (Gourlay Rd)	0%	0%	0%	0%	1%	0%	0%	0%	**0%**
Watergardens Town Centre (Cnr Kings Rd & Melton Hw	27%	29%	54%	15%	46%	15%	22%	27%	**30%**
Watervale Sc (Cnr Taylors Rd & Calder Park Dr)	3%	0%	0%	0%	2%	1%	0%	0%	**1%**
Westfield Airport West	0%	0%	0%	0%	1%	1%	0%	0%	**0%**
Other	0%	0%	2%	1%	2%	1%	2%	0%	**1%**
No Other	0%	0%	0%	1%	0%	1%	0%	0%	**0%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi

Table A5

Other centres used for non-food shopping

(% of respondent households)

Suburb/Centre	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
Brimbank Central	0%	8%	9%	5%	6%	7%	18%	7%	**7%**
Burnside Sc/Hub (Coles, Aldi)	0%	0%	2%	0%	3%	2%	0%	0%	**2%**
Cairnlea	0%	0%	0%	1%	0%	0%	0%	0%	**0%**
Centro Keilor	3%	3%	3%	0%	0%	1%	1%	0%	**1%**
Cs Square	0%	13%	5%	1%	8%	3%	1%	7%	**5%**
Deer Park Shops Supa Iga	3%	2%	2%	0%	3%	2%	2%	7%	**2%**
Delahey Village Supa Iga	0%	0%	0%	0%	0%	2%	0%	0%	**1%**
Derrimut Village Coles	0%	0%	0%	0%	0%	0%	1%	0%	**0%**
Hatchlands Drive Sc (Iga)	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Melton (High St, Woodgrove, Coburns)	0%	0%	2%	0%	2%	0%	1%	14%	**1%**
St Albans (Safeway, Supa Iga, Market)	0%	0%	2%	1%	0%	1%	0%	0%	**1%**
Sunshine (Marketplace, Plaza, Other)	12%	5%	3%	4%	2%	9%	11%	0%	**6%**
Taylors Hill Village (Coles)	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
Watergardens Town Centre	29%	20%	12%	20%	17%	17%	19%	29%	**18%**
Watervale Sc (Woolworths)	0%	0%	2%	1%	0%	0%	0%	0%	**0%**
Costco (Docklands)	6%	0%	0%	2%	0%	1%	0%	0%	**1%**
Melbourne Cbd	3%	3%	2%	7%	6%	3%	4%	0%	**4%**
Highpoint Sc	24%	30%	26%	23%	30%	21%	23%	14%	**25%**
Other	0%	0%	7%	1%	4%	2%	2%	0%	**3%**
No Other	21%	17%	24%	33%	20%	26%	17%	21%	**23%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Multiple responses allowed; percentages for each category are calculated over the total number of respondents by sector*

Source: MacroPlan Dimasi

Table A6

Major non-food anchor stores used

(% of respondent households)

Suburb/Centre	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
Big W - Highpoint Sc	0%	0%	0%	0%	1%	1%	0%	0%	**1%**
Big W - Sunshine (Marketplace, Hampshire Rd)	3%	9%	4%	7%	4%	11%	12%	13%	**8%**
Big W - Watergardens (Cnr Kings Rd & Melton Hwy)	13%	4%	16%	3%	14%	8%	6%	13%	**10%**
David Jones - Bourke St Melbourne	0%	2%	2%	1%	1%	0%	2%	0%	**1%**
David Jones - Highpoint	0%	0%	2%	3%	1%	1%	2%	13%	**2%**
Harris Scarfe - Highpoint Sc	0%	5%	0%	0%	1%	1%	0%	0%	**1%**
Kmart - Airport West	3%	0%	0%	0%	0%	1%	0%	0%	**0%**
Kmart - Centro Keilor (Taylors Rd)	13%	5%	14%	9%	4%	7%	6%	33%	**8%**
Myer - Bourke St Melbourne	0%	2%	0%	1%	2%	1%	3%	0%	**1%**
Myer - Highpoint	13%	11%	14%	20%	17%	12%	17%	0%	**15%**
Target - Brimbank Central (Station Rd)	27%	11%	2%	32%	2%	33%	31%	0%	**18%**
Target - Cs Square (Caroline Springs)	0%	29%	24%	1%	42%	3%	3%	7%	**18%**
Target - Deer Park	0%	0%	0%	1%	0%	1%	2%	0%	**0%**
Target - Highpoint Sc	0%	2%	0%	1%	0%	1%	2%	0%	**1%**
Target - Watergardens (Cnr Kings Rd & Melton Hwy)	7%	7%	14%	9%	4%	4%	6%	0%	**6%**
Other	7%	4%	6%	5%	2%	5%	8%	20%	**5%**
Dont Have One Main Store	13%	9%	2%	5%	6%	10%	2%	0%	**7%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi

Table A7

Main reason for using each particular centre for non-food shopping

(% of respondent households)

Suburb/Reason	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
Location Near Home	43%	49%	58%	48%	60%	64%	65%	53%	**58%**
Product Range/Variety	60%	58%	52%	51%	54%	50%	49%	67%	**53%**
General Price Of Products	10%	15%	12%	8%	11%	9%	2%	7%	**9%**
Brand Of Store	10%	5%	6%	9%	9%	7%	14%	0%	**8%**
Fashion Offer/Brands	3%	5%	8%	4%	6%	7%	3%	0%	**6%**
Other	7%	5%	2%	1%	4%	4%	2%	13%	**4%**
Location Near Work	0%	2%	0%	7%	3%	2%	3%	7%	**3%**
Customer Service	0%	4%	2%	0%	1%	2%	0%	0%	**1%**
Homewares Offer/Brands	0%	0%	0%	0%	1%	0%	0%	0%	**0%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Multiple responses allowed; percentages for each category are calculated over the total number of respondents by sector*

Source: MacroPlan Dimasi

Table A8

Level of satisfaction with non-food shopping alternatives

(% of respondent households)

Suburb/Rating	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
10-Outstanding	3%	9%	8%	5%	6%	11%	8%	7%	**8%**
9	7%	16%	12%	7%	8%	11%	11%	0%	**10%**
8	33%	22%	26%	31%	29%	24%	28%	47%	**28%**
7	23%	20%	22%	24%	25%	18%	20%	13%	**22%**
6	7%	13%	16%	12%	10%	7%	8%	13%	**10%**
5	0%	13%	10%	12%	7%	12%	9%	13%	**10%**
4	3%	0%	2%	1%	5%	5%	6%	0%	**4%**
3	7%	4%	2%	1%	3%	2%	2%	0%	**2%**
2	7%	2%	0%	0%	3%	0%	8%	0%	**2%**
01-Extremely Poor	3%	2%	0%	3%	2%	3%	2%	0%	**2%**
Dont Know	7%	0%	2%	4%	3%	6%	0%	7%	**3%**
Average Rating (out of 10)	**6.57**	**7.09**	**7.24**	**6.99**	**6.87**	**7.03**	**6.74**	**7.29**	**6.96**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi

Table A9

Main reasons for inadequacy of existing non-food retail offer within area

(% of respondent households)

Suburb/Reason	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
Not enough variety/too small	17%	5%	8%	11%	13%	12%	12%	7%	**12%**
Limited Range	10%	16%	4%	8%	10%	8%	18%	7%	**10%**
Too expensive	3%	4%	0%	1%	2%	3%	0%	0%	**2%**
Dislike Fashion Offer	3%	2%	0%	0%	2%	3%	0%	0%	**2%**
Prefer Kmart	0%	0%	0%	3%	0%	2%	0%	0%	**1%**
Prefer Department Store	0%	0%	0%	0%	1%	1%	3%	7%	**1%**
Poor Customer Service	3%	0%	2%	0%	1%	1%	0%	0%	**1%**
Other	0%	0%	2%	0%	1%	1%	0%	0%	**1%**
Poor Carparking	0%	2%	0%	0%	0%	1%	2%	0%	**0%**
Prefer Big W	0%	0%	0%	0%	0%	1%	0%	0%	**0%**
Prefer Target	0%	0%	0%	1%	0%	0%	0%	0%	**0%**
Dislike Homewares Offer	0%	0%	0%	0%	0%	0%	0%	0%	**0%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Multiple responses allowed; percentages for each category are calculated over the total number of respondents by sector*

Source: MacroPlan Dimasi

Table A10

Frequency of shopping at Burnside Hub SC

(% of respondent households)

Suburb/Frequency	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
2-3 times a week (or more)	0%	45%	8%	0%	16%	16%	2%	7%	**14%**
Once a week	3%	27%	4%	3%	17%	12%	8%	20%	**12%**
Once a fortnight	0%	11%	4%	1%	11%	8%	8%	0%	**8%**
Once a month	3%	7%	18%	8%	17%	8%	18%	20%	**13%**
Every 2-3 months	10%	4%	14%	15%	8%	10%	11%	13%	**10%**
Once every 6 months or so	10%	2%	4%	5%	5%	9%	9%	20%	**7%**
Less than every 6 months / never	73%	4%	48%	68%	25%	37%	45%	20%	**37%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi

Table A11

View of potential Burnside Hub SC expansion

(% of respondent households)

Suburb/Rating	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
A significant improvement	43%	76%	52%	36%	57%	59%	57%	67%	**56%**
A small improvement	20%	18%	10%	25%	18%	14%	23%	20%	**18%**
No different	33%	5%	38%	35%	23%	26%	20%	13%	**25%**
A little worse	0%	0%	0%	1%	2%	1%	0%	0%	**1%**
A lot worse	3%	0%	0%	3%	0%	0%	0%	0%	**0%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi

Table A12

Potential new anchor tenants desired

(% of respondent households)

Suburb/Potential Tenant	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
Kmart	30%	47%	38%	41%	39%	50%	54%	73%	**45%**
Big W	20%	51%	30%	29%	40%	39%	34%	53%	**38%**
Target	10%	35%	20%	13%	15%	22%	25%	40%	**20%**
Myer	20%	4%	10%	15%	15%	8%	12%	7%	**12%**
Woolworths	7%	9%	6%	5%	10%	8%	8%	13%	**8%**
Costco	7%	2%	2%	5%	8%	6%	8%	13%	**6%**
David Jones	3%	4%	8%	9%	6%	3%	3%	0%	**5%**
Coles	0%	7%	6%	3%	5%	2%	8%	0%	**4%**
Aldi	0%	0%	2%	0%	1%	2%	2%	0%	**1%**
Zara	0%	0%	0%	1%	2%	1%	0%	0%	**1%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Multiple responses allowed; percentages for each category are calculated over the total number of respondents by sector*

Source: MacroPlan Dimasi

Table A13

Potential change in shopping frequency at Burnside Hub, given addition of Big W and Woolworths

(% of respondent households)

Suburb/Frequency	Albanvale	Burnside	Burnside Heights	Cairnlea	Caroline Springs	Deer Park	Derrimut	Rockbank	Grand Total
A lot more frequently	27%	64%	42%	29%	54%	52%	51%	33%	**49%**
A little more frequently	37%	31%	24%	43%	24%	24%	37%	47%	**29%**
About the same	30%	5%	32%	25%	19%	21%	9%	20%	**20%**
A little less frequently	0%	0%	0%	0%	1%	1%	2%	0%	**1%**
A lot less frequently	7%	0%	2%	3%	2%	2%	2%	0%	**2%**
No. of respondent households	**30**	**55**	**50**	**75**	**195**	**165**	**65**	**15**	**650**

**Single response only*

Source: MacroPlan Dimasi