

BROADWAY

SHOPPING CENTRE 2015

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BROADWAY

**AUSTRALIA'S
NO. 1 MOST
PRODUCTIVE
SHOPPING CENTRE**

01 CENTRE STATISTICS

• #1 BigGuns MAT/m ²	2013, 2014 & 2015
• 1st Centre in Australia & New Zealand	+\$12,000 psm
• MAT	\$507m as at June 2015
• Traffic	13.7M as at June 2015
• GLA	50,017 sqm
• 5 Majors	Coles, Aldi, Target, Kmart, Hoyts
• 12 Mini Majors	Apple, Harvey Norman, JB Hi Fi, Harris Farm Markets Rebel Sport, Broadway Healthcare, The Reject Shop, Dymocks, Chemist Works, Fernwood Gym, Priceline, Off Broadway Hotel
• 137 Specialty Stores	
• 12 Cinema: Hoyts	
• 640 Seat Food Court	
• 5-Star NRMA rated car park with +1,800 spaces and 2 hours free parking	
• Total Centre Sales psm	\$11,187 as at June 2015
• Total Specialty Sales psm	\$11,848 as at June 2015

Current as at June 2015

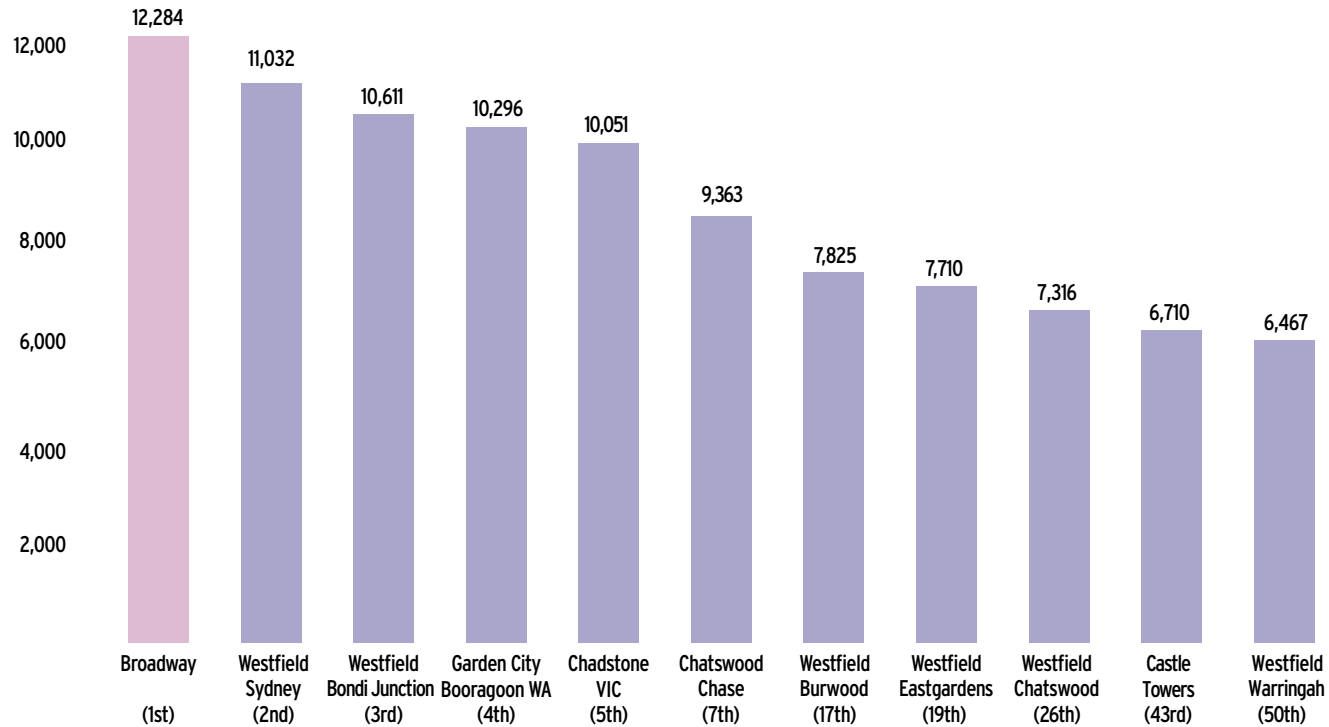




**WHAT IS
THE
BROADWAY
OFFER?**

02 SALES AND CENTRE TRAFFIC

TOTAL CENTRE SALES \$12,248 (PSM)*
Compared to the top 83 Regional Centres



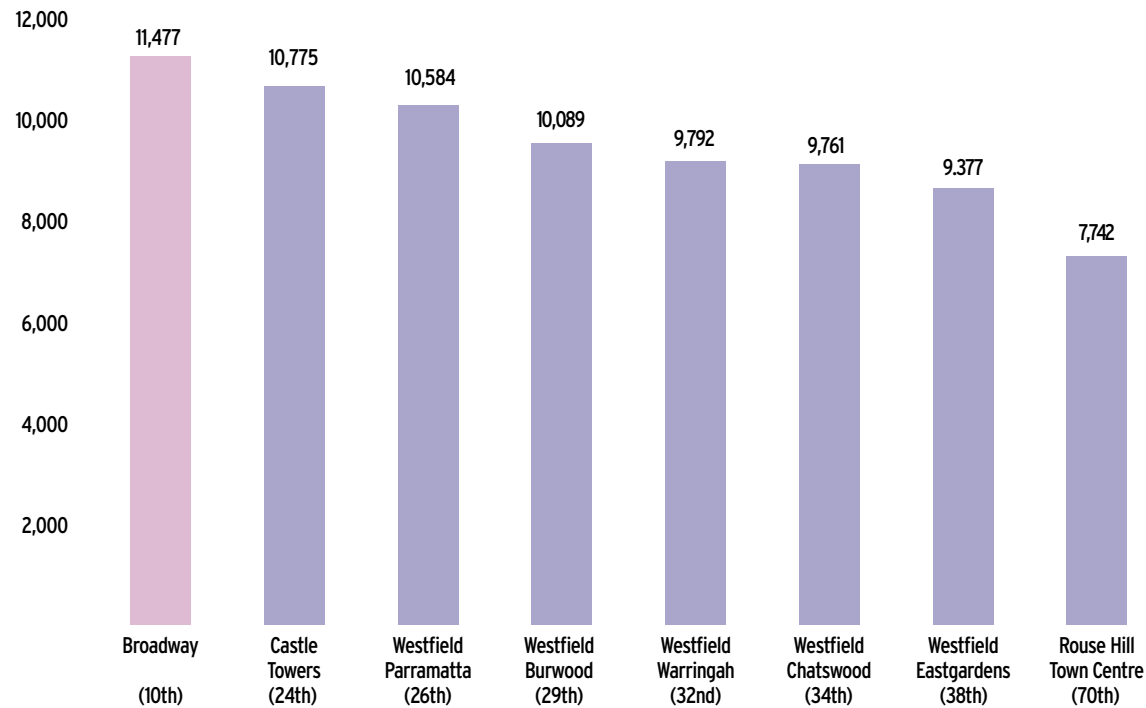
Source: SCN 2015 Big Guns. All figures include GST. Compared to the top 83 Regional Centres.

■ BROADWAY ■ THE REST

02 SALES AND CENTRE TRAFFIC

SPECIALTY SALES \$11,477 (PSM)*

Compared to the top 83 Regional Centres

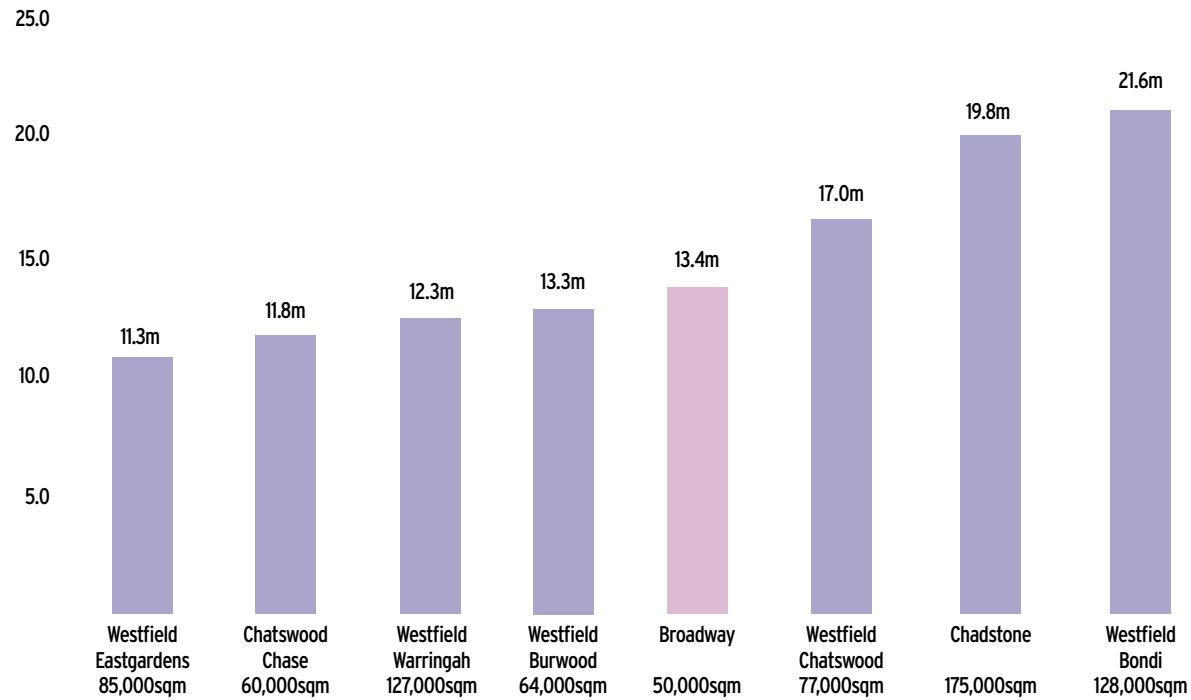


Source: SCN 2015 Big Guns. All figures include GST. Compared to the top 83 Regional Centres.

■ BROADWAY ■ THE REST

02 SALES AND CENTRE TRAFFIC

CURRENT CENTRE TRAFFIC 13.6 MILLION*



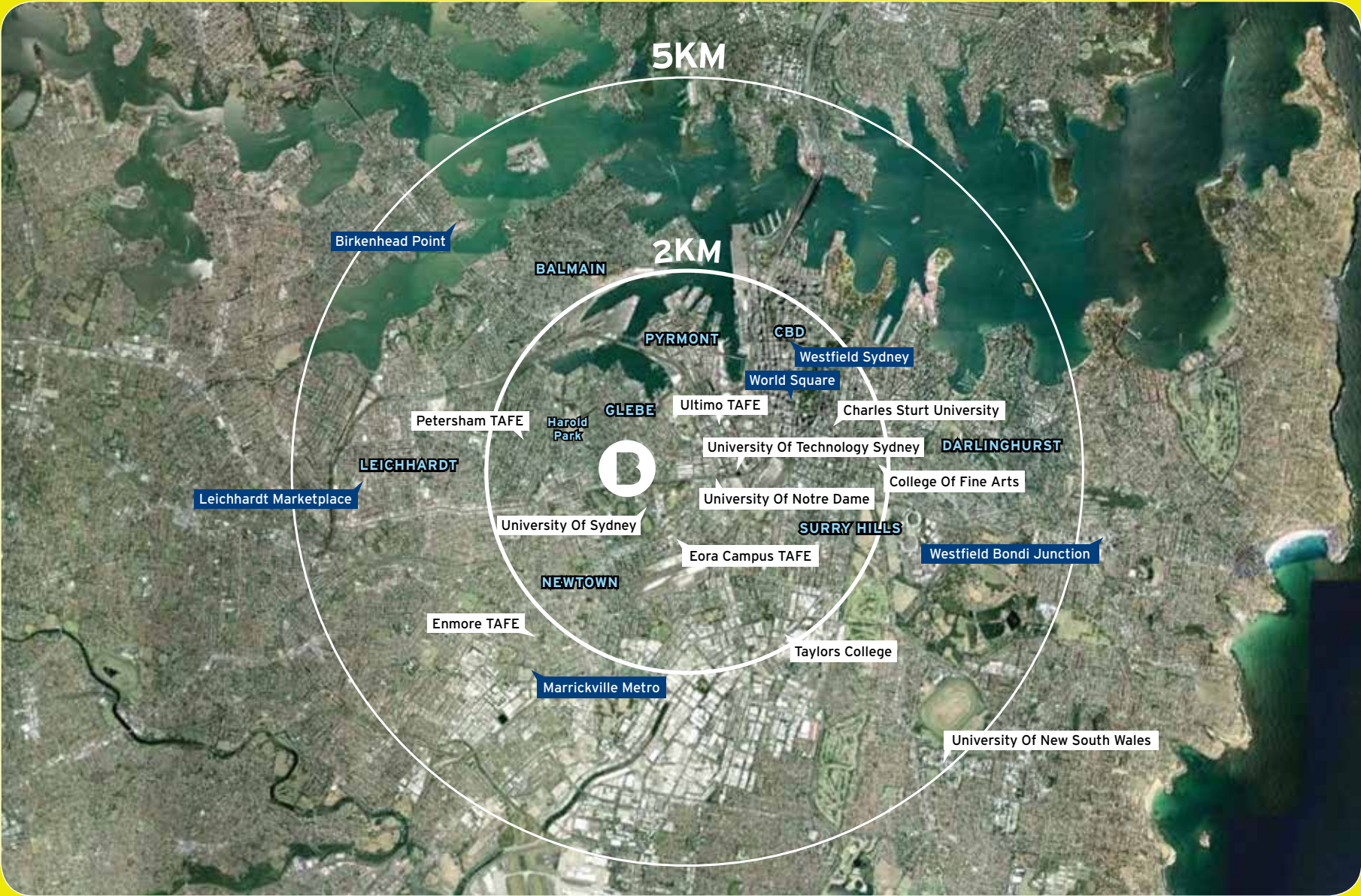
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■ BROADWAY ■ THE REST

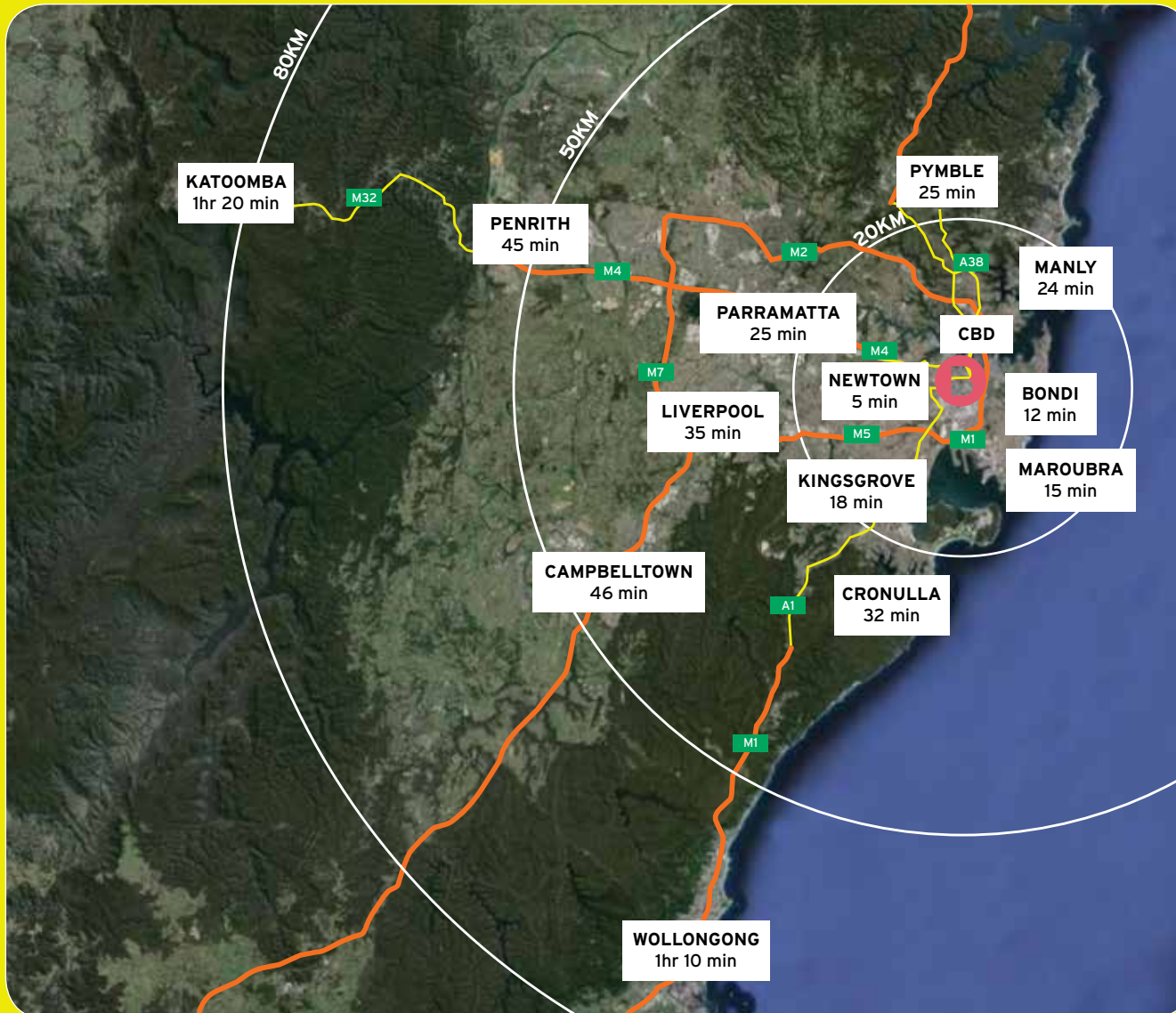


**SHOPPING
IS ALL
ABOUT
CHOICE &
OPPORTUNITY**

03 BROADWAY & SURROUNDS



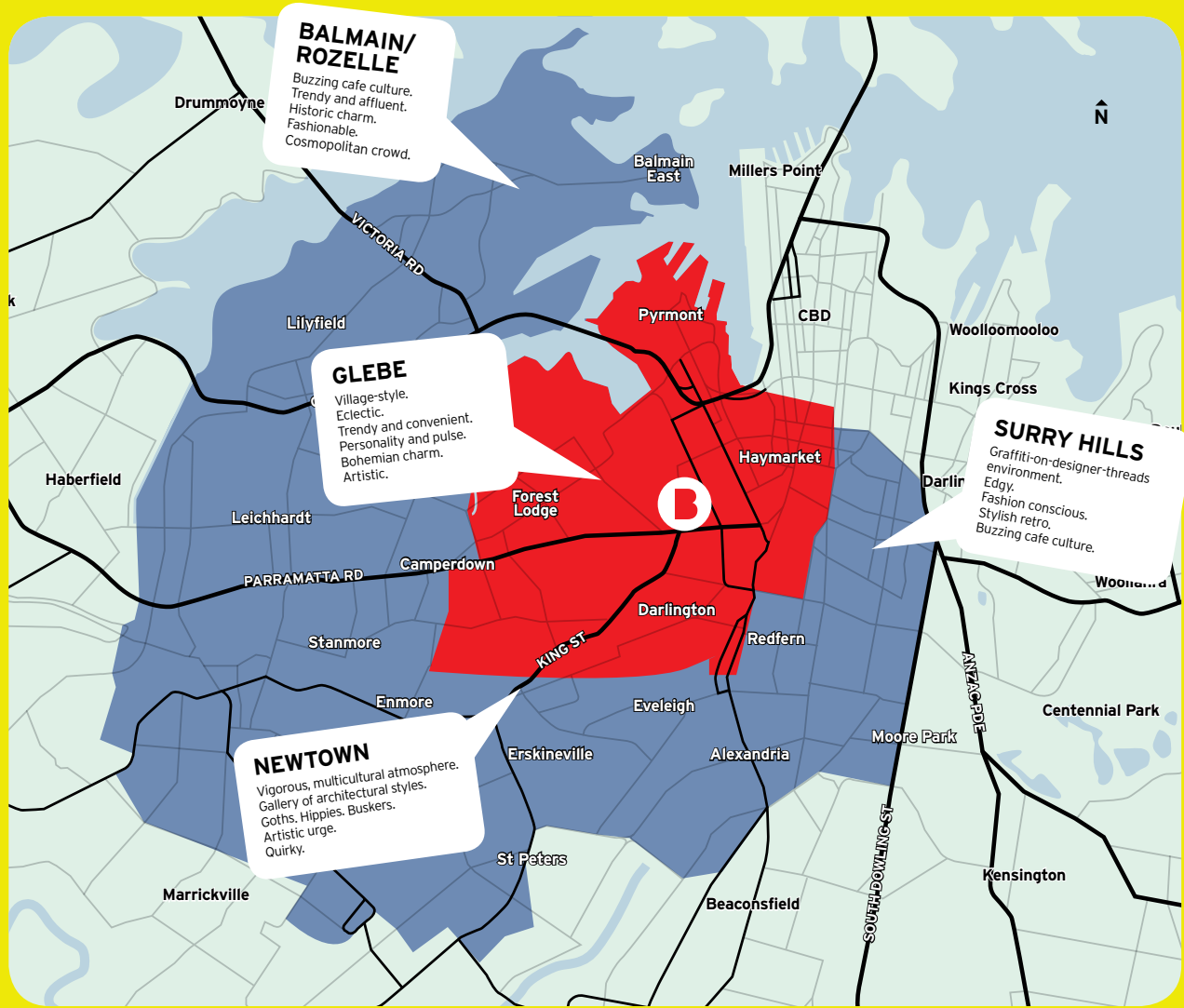
03 BROADWAY AT THE EPICENTRE



Situated in the hub of Sydney at the south-western edge of the Central Business District, Broadway benefits from being on major arterial routes through and across Sydney. Drawing from such a wide area, customers appreciate that Broadway is the only Sydney shopping destination they need.

- Located 2km south-west of the Sydney CBD.
- Highly visible location on the northern side of Parramatta Road (The Broadway). The Broadway is an arterial route through Sydney's Inner West, connecting George Street in the CBD with Parramatta Rd, the city's major east-west arterial route which extends through to Parramatta in Sydney's West.
- Well serviced by public transport including high frequency bus routes and walking distance from Central railway station.
- Customers reside in over 180 suburb locations through Sydney, 30% of them from further than the main trade area.

03 BROADWAY & SURROUNDS



THE INNER WEST SYDNEY'S CULTURAL HUB

TRADE AREA POPULATION

TRADE AREA	FORECAST		
	2012	2016	2026
PRIMARY TA	76,640	83,440	103,440
SECONDARY TA	216,950	225,750	251,250
MAIN TA (TOTAL)	293,590	309,190	354,690



03 BROADWAY & SURROUNDS

GLEBE

Divided through the middle by Glebe Point Road, this Village Centre is characterised by a wide range of holistic health and new age stores, bookshops, cafes and restaurants. Together with a broad residential demographic, the area hosts some major features including Wentworth Park and Bicentennial Park.



- Village-style suburb sitting on the peripheries of Sydney city.
- Trendy and convenient option.
- Eclectic mix of students, professionals and enduring down-to-earth locals.
- The more remote you are positioned down Glebe Point Road, usually, the more privileged.
- Those fortunate of the wallet find themselves in restored Victorian townhouses or in new developments on the waterfront.
- Prides itself on its artistic, community-minded approach to city living.
- Multitude of cosy, comfortable and charming watering holes (pubs).
- Places to eat, shop, drink coffee and stock up on groceries are not in short supply in Glebe.

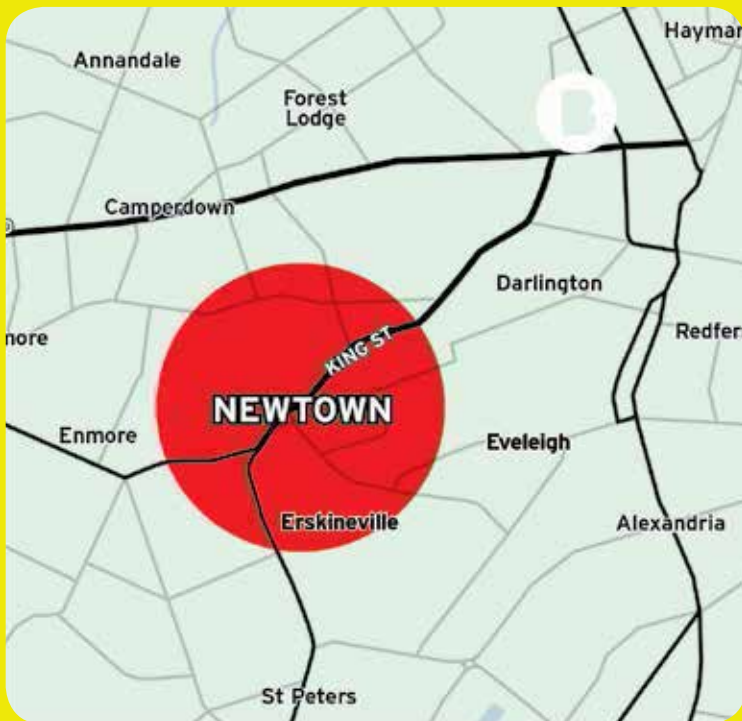


Credits: JAM project, kayadams.com

03 BROADWAY & SURROUNDS

NEWTOWN

Any experience of Newtown confirms that the Inner West's middle name is 'diversity'. A stroll along King Street is likely to bring you into contact with goths, hippies, dreadlocked buskers... name your subculture! The suburb's left-of-centre aesthetic has long made it home to many artists, writers and musicians, and today it's saturated with live music venues, performing arts spaces and quirky pubs.



- Vigorous, multicultural atmosphere.
- Pioneer of embracing the multiculturalism which embodies Sydney.
- Artistic urge runs strong demonstrated by the eclectic subcultures.
- Housing is a gallery of architectural styles from the typical Newtown and Victorian-era terraced houses to cottages and mansions.
- Quirky shops and boutiques selling works by local designers.
- Rich in restaurants offering international cuisine.
- Popular area for club-goers and non-mainstream film fans.
- High tourist and student volumes.

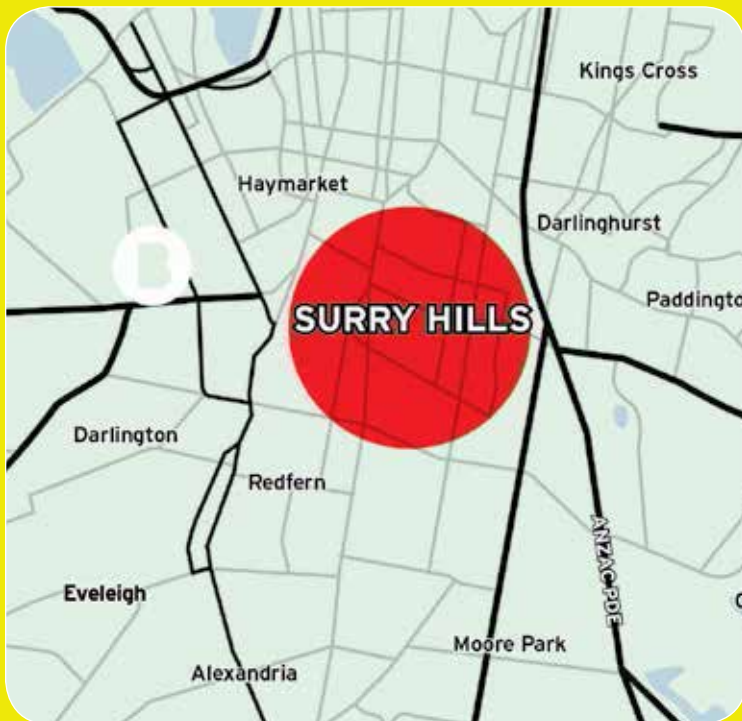


Credits: JAM project, Newtown Graffiti, Nicolas Boullosa

03 BROADWAY & SURROUNDS

SURRY HILLS

Any experience of Newtown confirms that the Inner West's middle name is 'diversity'. A stroll along King Street is likely to bring you into contact with goths, hippies, dreadlocked buskers... name your subculture! The suburb's left-of-centre aesthetic has long made it home to many artists, writers and musicians, and today it's saturated with live music venues, performing arts spaces and quirky pubs.



- Graffiti-on-designer-threads environment.
- Terrace housing is very common in Sydney and can especially be seen in Surry Hills.
- Increasing amount of apartment development.
- Great deal of "community spirit".
- Most musicians, artists, writers, or students passing through or living in Sydney will at some point live here.
- Fashion conscious - stylish retro clothing and furniture.
- Young professionals live, renovate and socialise here.
- Down-to-earth lifestyles.
- Many great pubs, restaurants or cafes; at least 50 restaurants on almost every street.



Credits: Nicolas Boullosa

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03 BROADWAY & SURROUNDS

BALMAIN & ROZELLE

Historically Balmain was one of Sydney's oldest working class suburbs where many of Sydney's ferries were built. Today it's renowned for being one of the city's trendiest and most affluent suburbs. Some of Australia's well-known writers, actors and entertainers call this harbourside village their home.



- Village atmosphere.
- Home to writers, actors and entertainers.
- Cosmopolitan crowd with artistic roots.
- Colourful streets and historical charm is combined with the fashionable food and shopping.
- Eating options are plentiful with buzzing cafes and restaurants offering a range of experiences.
- Pulsating nightlife.



Credits: Nicolas Boullosa

**OUR
BRAND
IS NOT ALL
ABOUT
US**

**OUR
BRAND IS
ALL ABOUT
OUR
CUSTOMERS**

04 OUR CUSTOMERS

TRADE AREA AND SOCIO DEMOGRAPHIC PROFILE

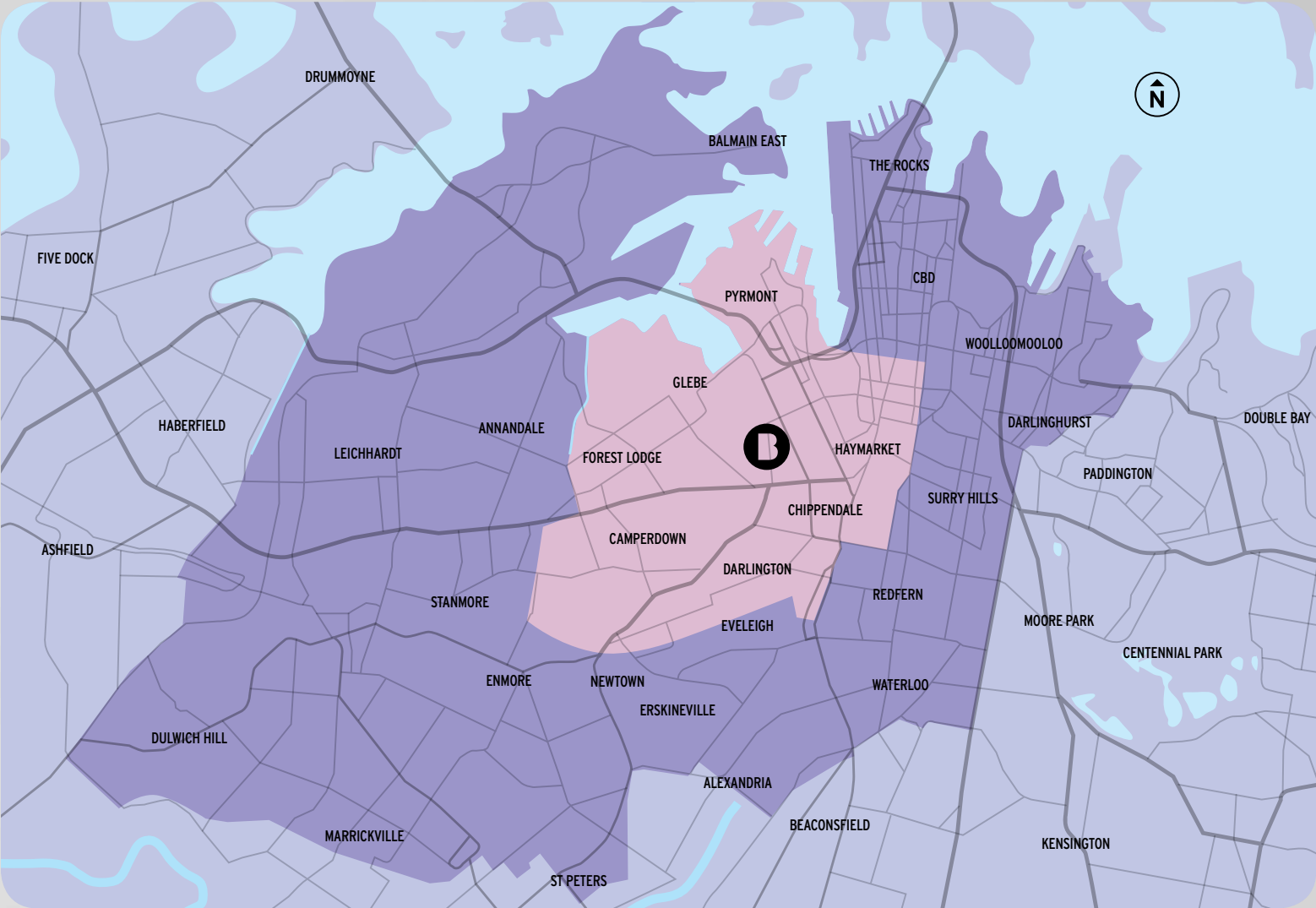
- Main Trade Area Population 293,590 approx.
Population growth +1.4% to 2026
- 49% 20-39 yrs (19% above Sydney average)
- 80% white collar workers (of those in the workforce)
- 65% Female, 35% Male
- Household Income \$82,800 p.a.
- Income +13% on Sydney average (main trade area)
- High disposable income (56% rent)
- 72% visit Broadway at least one a week
- 36% of customers walk to the Centre
- New residential developments; Central Park and Harold Park by Mirvac
- +3,000 residents Harold Park (2k from Broadway)
- +8,000 workers and residents at Central Park (1k from Broadway)

Source: Urbis, Directional Insights Market Research 2011, Dimasi Market Snapshot 2012.



04 OUR CUSTOMERS

TRADE AREA AND SOCIO DEMOGRAPHIC PROFILE



- PRIMARY AREA
- SECONDARY AREA



04 OUR CUSTOMERS

PSYCHOGRAPHIC PROFILE

PRIMARY TRADE AREA

- Shopping is for convenience and necessity rather than choice.
- Style conscious, active residents and big users of technology.
- Short term residents, reliant on public transport.
- CBD and local shopping are all within easy reach.
- Transient population due to high student population.

SECONDARY TRADE AREA

- University educated professionals and students.
- Individual incomes higher than in the Primary Trade Area providing plenty of spending money.
- 2 of 4 workers are employed in professional roles and because of their proximity to the city, are likely to use public transport.
- Rents are high although with their high salaries, often have secondary incomes from share investments.
- Low representation of children in the population.
- Source: Pacific Micromarketing, October 2012.



04 OUR CUSTOMERS

SHOPPER PROFILE – MATT & AMANDA

YOUNG PROFESSIONALS

- Singles, couples, no dependents
- Average age 35 years
- Higher than average incomes
- 25% of our customers have a household income of over \$104,000.
- Professional/Managerial/Office/Clerical
- Buying or own home
- Main Reason to visit
 - Fresh Food/Groceries
 - DDs
 - Homewares
 - Services
 - Fashion

Source: Directional Insights Customer Exit Survey
Research Report July 2011.

Represents
46%
of our shoppers



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04 OUR CUSTOMERS

SHOPPER PROFILE - AMY

STUDENT

- 100,000 students pass through universities within 1 km of Broadway Shopping Centre
- 23 years old
- Lower than average income
- Part time/casual employment
- Renting
- Main Reason to visit
 - Food Court
 - Fresh Food
 - Youth Fashion
 - Entertainment
- Sydney University Student

Source: Directional Insights Customer Exit Survey
Research Report July 2011.

Represents
28%
of our shoppers



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04 OUR CUSTOMERS

SHOPPER PROFILE – DAVID, KAREN, CHARLIE & SOPHIE

YOUNG FAMILIES

- Highest average spend of Broadway's customers at \$82

-
- Buying or own home

-
- Main Reason to visit
 - Fresh Food/Groceries
 - DDs
 - Entertainment
 - Services
 - Fashion

Represents
12%
of our shoppers

Source: Directional Insights Customer Exit Survey
Research Report July 2011.



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