LIVERPOOL CITY CENTRE RETAIL STUDY

Summary of findings and retail development guidelines

Certified B Corporation

SGS Economics & Planning

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LIVERPOOL CITY CENTRE RETAIL

INTRODUCTION & SUMMARY OF FINDINGS

SGS Economics & Planning

Introduction

SGS Economics and Planning has been commissioned by Liverpool City Council (Council) to provide advice about the opportunities for retail development of the Liverpool City Centre and what kinds of retail spaces should be provided in mixed use developments. This study provides a guide to how retail development can enhance the retail offering of the Liverpool City Centre and expand the City Centre's economy.

This report contains:

- A summary of the findings of SGS's background research regarding the prospects for retail development in the Liverpool City Centre,
- A framework for the evaluation of mixed use developments including overall retail objectives,
- Future directions for retail development in each part of the City Centre, and
- Supporting material in appendices which outlines the retail context for the Liverpool City Centre and some of the opportunities and constraints for retail development.

Summary of findings

Liverpool City Centre has a strong retail future driven by population growth, commercial development and an expanding health and education precinct. Continued economic development will be driven by NSW Government and Liverpool Council strategic plans, which identify Liverpool as one of the most important CBDs in the Western Parkland City, one of Greater Sydney's three cities.

As mixed use development occurs in the Liverpool City Centre it will be important to take advantage of spatial opportunities to build successful retail precincts.

The need for the right tenant mix

There is a risk that retail spaces which do not have a target tenant type and so are unattractive to retailers, or which are in unattractive locations, will become semi-permanent retail vacancies. Developers should consider example tenant profiles and provide appropriate spaces for them.

Specialised retail experiences

Westfield Liverpool is likely to continue to play a regional retail role and be the major retail centre in Liverpool in the future. Retailing outside of Westfield should not seek to duplicate Westfield's retail mix, but should instead focus on building on the unique strengths of other parts of the City Centre: boutique and specialised retail offerings which are not found elsewhere. These include Indian fashion, gold jewellery and foods from a wide variety of cultures. Where there are already clusters of particular types of retailers in the Liverpool City Centre providing a unique retail experience, suitable spaces for these retailers should be retained. Where new developments occur in these existing precincts, retail spaces should be delivered which are suitable for the current profile of retailers.

Retail concentration

There is not expected to be enough additional retail demand in the Liverpool City Centre in the future to support a large new shopping centre or the creation of large new retail destinations outside of the existing retail area. For this reason, it will be important to concentrate the retail and hospitality experience in the Liverpool City Centre along Macquarie Street, and along Railway Street which connects Macquarie Street to the Liverpool Railway Station. Macquarie Street forms a retail spine which is accessible from multiple other parts of the City Centre and which connects Westfield Liverpool and the Western Sydney University with Council's Civic Place development. It has very high levels of amenity and the prospects to develop as a retail destination in its own right. There are currently several vacancies on Macquarie Street and some lower-value tenancies such as discount stores. Concentrating retail energy along Macquarie Street provides the best prospect to address this while taking advantage of its position and natural amenity.

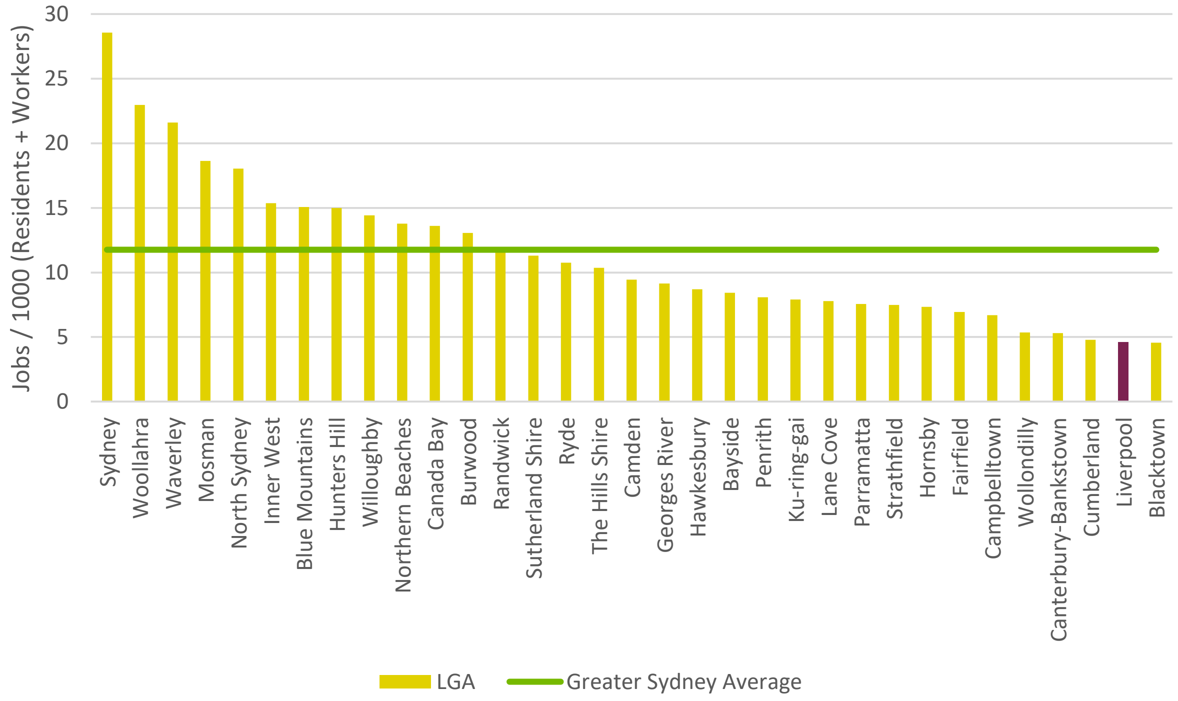
Summary of findings

Opportunities in hospitality

The Liverpool LGA has the second lowest number of jobs in cafés, restaurants, pubs and bars per thousand residents or workers in any LGA in Greater Sydney. While there are some successful hospitality venues in and around the Liverpool City Centre, it does not have a reputation as a large dining destination. This creates an opportunity, as there are no major dining destinations nearby but significant population growth is planned in the Liverpool LGA and surrounds, including in new suburbs to the west and south-west. Liverpool is well positioned to develop as a major destination for hospitality, filling this unmet demand.

This opportunity is heightened by the planned expansion of universities and continued commercial development in the Liverpool City Centre, creating a demand for places to eat and drink during the day and after work or study. There are also likely to be increases in tourist visitation to Liverpool as a result of the opening of the Western Sydney International Airport.

Per capita jobs in cafés, restaurants pubs and bars



Source: SGS 2019, ABS Census 2016

LIVERPOOL CITY CENTRE RETAIL

RETAIL EVALUATION FRAMEWORK

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Assessment guidelines

Development applications with a retail component should comply with:

- The future retail principles for the Liverpool City Centre,
- The desired future retail character in each precinct, and
- Retail development requirements in each precinct.

The table on the right shows the extent to which developments may deviate from development requirements and the desired future retail character. In each case, applicants should demonstrate how they are responding to these criteria. A development design and application checklist is provided on Page 11, through which compliance with criteria can be demonstrated.

Catalyst developments

Catalyst developments are those that have a retail scale large enough to change the retail character of the area in which they are located. They can create new retail destinations and change the perception of a part of the City Centre, or of the City Centre more broadly. By doing so they can encourage development on adjacent sites. Catalyst developments would generally be expected to:

- Have a site area of at least 1,500sqm,
- Have at least 1,000sqm of retail floorspace, and
- Contain multiple retail premises

Given their potential significance for local retail character, catalyst developments present opportunities as well as threats. Catalyst developments may deviate from the development requirements and intended character for their retail precinct, but must have a curated retail mix which responds to the overall retail objectives of the City Centre and builds its overall retail competitiveness.

Assessment criteria	Small developments in the Macquarie Street Spine	Other developments which are not catalyst developments	Large and catalyst developments
Developments should meet development requirements for their sub-precinct	✓	✓	✓
Developments may vary from development requirements, but should reinforce the desired future retail role of their sub-precinct		✓	✓
Developments should have a retail vision, with retail premises designed for a particular tenant profile		✓	✓
Developments may vary from the desired future character of their sub-precinct, but should meet the overall retail principles for Liverpool City Centre			✓

Retail principles

The following principles and objectives outline the strategic direction for retail development in the Liverpool City Centre.

- Retail energy in the Liverpool City Centre, apart from in Westfield Liverpool, should be concentrated on Macquarie Street, which should form Liverpool's retail spine. It presents the greatest opportunity for development of an eat street.
- Westfield will be likely to continue to function relatively separately from the rest of the City Centre as the major retail centre in the Liverpool LGA and surrounds.
- Retail premises elsewhere in the City Centre should provide boutique and unique experiences that are only available outside of Westfield, like Indian fashion, gold jewellery and culturally diverse groceries and dining experiences. The retail identity of the associated areas should be recognised and strengthened as mixed use development occurs.
- The development of additional enclosed shopping centres or large expansions of existing shopping centres should not occur unless they do not impact on turnover in other parts of the Liverpool City Centre and other centres nearby.
- Areas on the fringe of the City Centre should have only limited retail floorspace provided in order to avoid creating long-term vacancies or detracting from Macquarie Street’s retail centrality.
- Mixed use and retail development should complement rather than compromise the broader roles of the Liverpool City Centre, including its civic role, its role as a major service centre with a broad range of medical and associated premises, its commercial role and its role in accommodating the Liverpool Health and Education Precinct.

More detail about how these principles and objectives inform developments in different parts of the Liverpool City Centre are provided in the Retail Precincts section of this report.

Development design and application checklist

The following steps should be followed when determining the kinds of retail premises included in proposed development. Apart from small developments in the Macquarie Street Spine, this should be documented in a development application:

1. Consider economic and social context including local demographics (refer to Retail Context Appendix of this report).

2. Competition analysis of local trade area including what kinds of premises are vacant or performing well.

3. Respond to spatial opportunities and constraints of subject site (refer to Opportunities and Constraints Appendix of this report)

4. Determine best use of the ground floor – this may be not be retail (refer to retail principles and precinct directions in this report)

5. Establish target users for proposed retail premises (refer to retail principles and precinct directions in this report)

6. Receive architect input on key designs and premise requirements for target retail uses

7. Ensure designs are consistent with the Liverpool City Centre Public Domain Master Plan

8. Consider design of services including utility connections and loading docks

Development proponents for **catalyst developments** should submit an expanded retail profile demonstrating their compliance with most of the sub-precinct objectives and requirements, as well as their compliance with the overall retail objectives for the City Centre. This would comprise the expected contents of the retail profile for mixed use developments as well as:

- A clear vision for the retail identity of the development and how this could change the surrounding retail landscape, and
- A discussion of the intended retail profile or the retail tenants that will be curated in the development and how this will reinforce overall retail objectives for the Liverpool City Centre.

Sample shop sizes

As noted on the previous page, developers should consider what kinds of retail tenants would be most appropriate and receive architect input on how their development can be designed to accommodate these tenants. The table on the right provides potential sizes for retail premises of different types.

This table does not represent the full range of sizes of such premises, but rather provides a range of average sizes for different kinds of retail centres compiled by SGS from benchmarks in shopping centres and in Liverpool. This table provides an indication of the appropriate sizes for retail premises, but it is likely that many premises will fall outside of average ranges and that many will be smaller.

Most benchmarked shops were larger than 75sqm. Retail premises of 75sqm or larger would be suitable for a broad range of uses, as would multiple premises grouped in the same part of a building which providing flexibility for reconfiguration in the future.

Retail type		Average size (sqm)
Supermarket	Small supermarkets	250-1,500
	Larger supermarkets	2,000-4,500
Other food	Fruit & Vegetables	150-350
	Food specialties	75-140
	Liquor	120-170
Clothing and soft goods	Clothing	80-200
	Footwear	80-130
	Fashion accessories and jewellery	60-90
Household goods Department stores	Homewares	130-180
	Showrooms	300-5,000
	Discount department stores	6,000-8,000
	Department stores	6,000-15,000
Other retail	Books	120-190
	Newsagents	100-140
	Pharmacies	140-300
	Sporting goods	150-300
	Discount variety	180-250
Hospitality	Cafés and restaurants	60-250
Non-retail	Massage & nail bars	50-80
	Medical centres	140-300

LIVERPOOL CITY CENTRE RETAIL

RETAIL PRECINCTS

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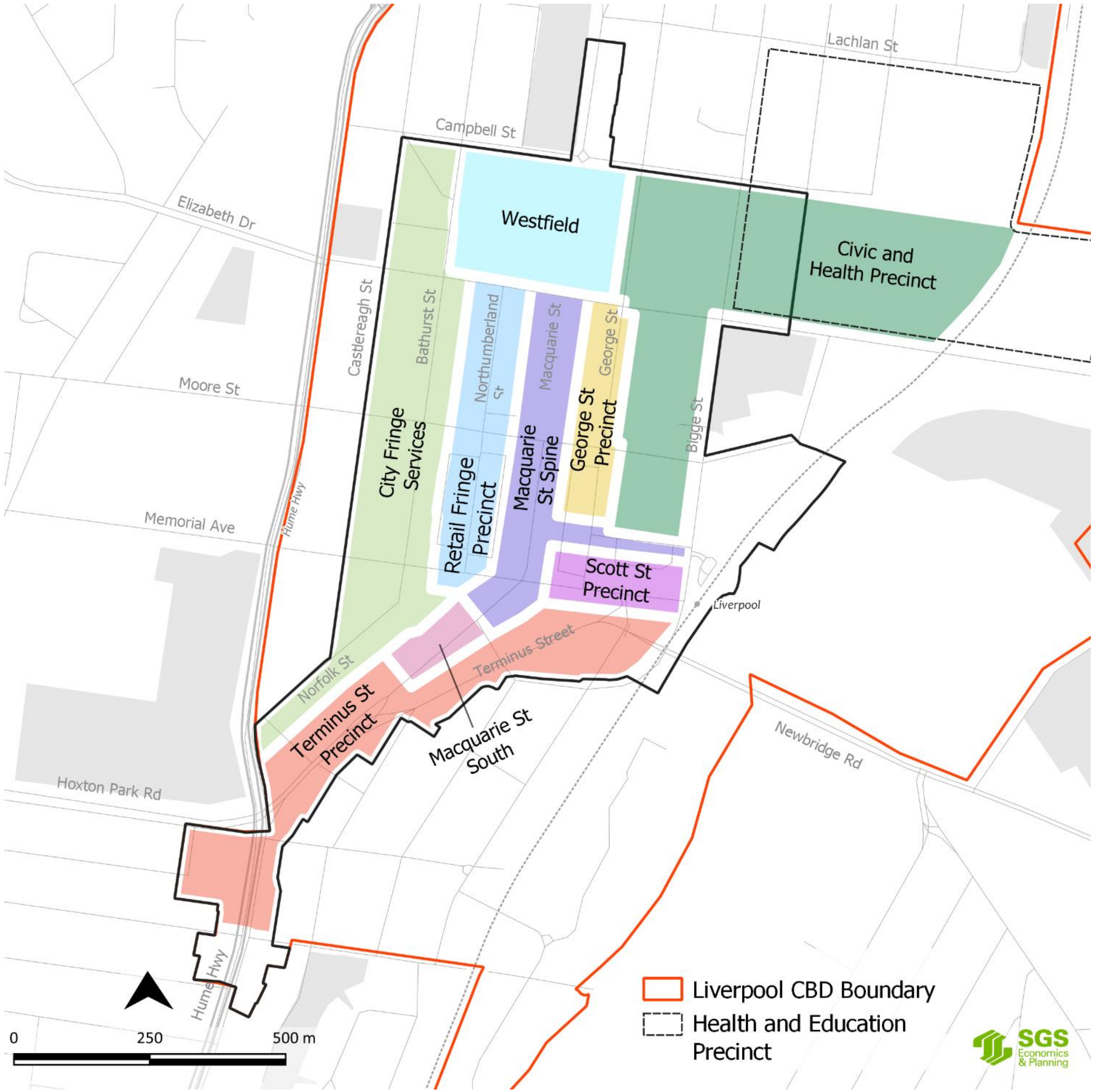
Retail precincts

Retail precincts have been identified in the Liverpool City Centre, grouping together areas with similar retail characteristics and future objectives.

The following pages provide a summary of the intended future retail character and development requirements for each precinct. As noted in the Retail Evaluation Framework, development proponents should consider and respond to the future retail characters and development requirements.

!!! STREET NAMES !!!



Development guidelines summary

This table provides a summary of development requirements on the following pages, but does not replace or overrule the more detailed requirements discussed for each precinct.

Assessment criteria	Macquarie Street Spine	Westfield Precinct	George Street Precinct	Scott Street Precinct	Civic and Health Precinct	Retail Fringe Precinct	Macquarie Street South	City Fringe Services	Terminus Street Precinct	Catalyst Developments
Developments should reinforce existing retail streets by facing active frontages towards them	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Where possible, loading docks and vehicle access should be from lanes or secondary streets	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
All retail spaces should include facilities required for restaurants and cafes including provision of services	✓						✓			
The street-front should be composed primarily of fine-grain shop fronts	✓		✓							
Additional retail premises in through-site arcades may be appropriate	✓									✓
The interface with Macquarie Street and other parts of the City Centre should be improved		✓								
A mixture of retail premises and other uses including commercial spaces and services should be provided				✓	✓	✓	✓		✓	✓
Only limited amounts of retail space should be provided								✓		
Specialised retail spaces should be provided, consolidated within the proposed development, with large floorplates and increased ceiling heights (>4 m)									✓	
Customer car parking is likely to be required and should be easily accessible									✓	
Developments may deviate from requirements if this responds to a strong retail vision and anticipated tenant requirements										✓

Macquarie Street Spine & Railway St Connection

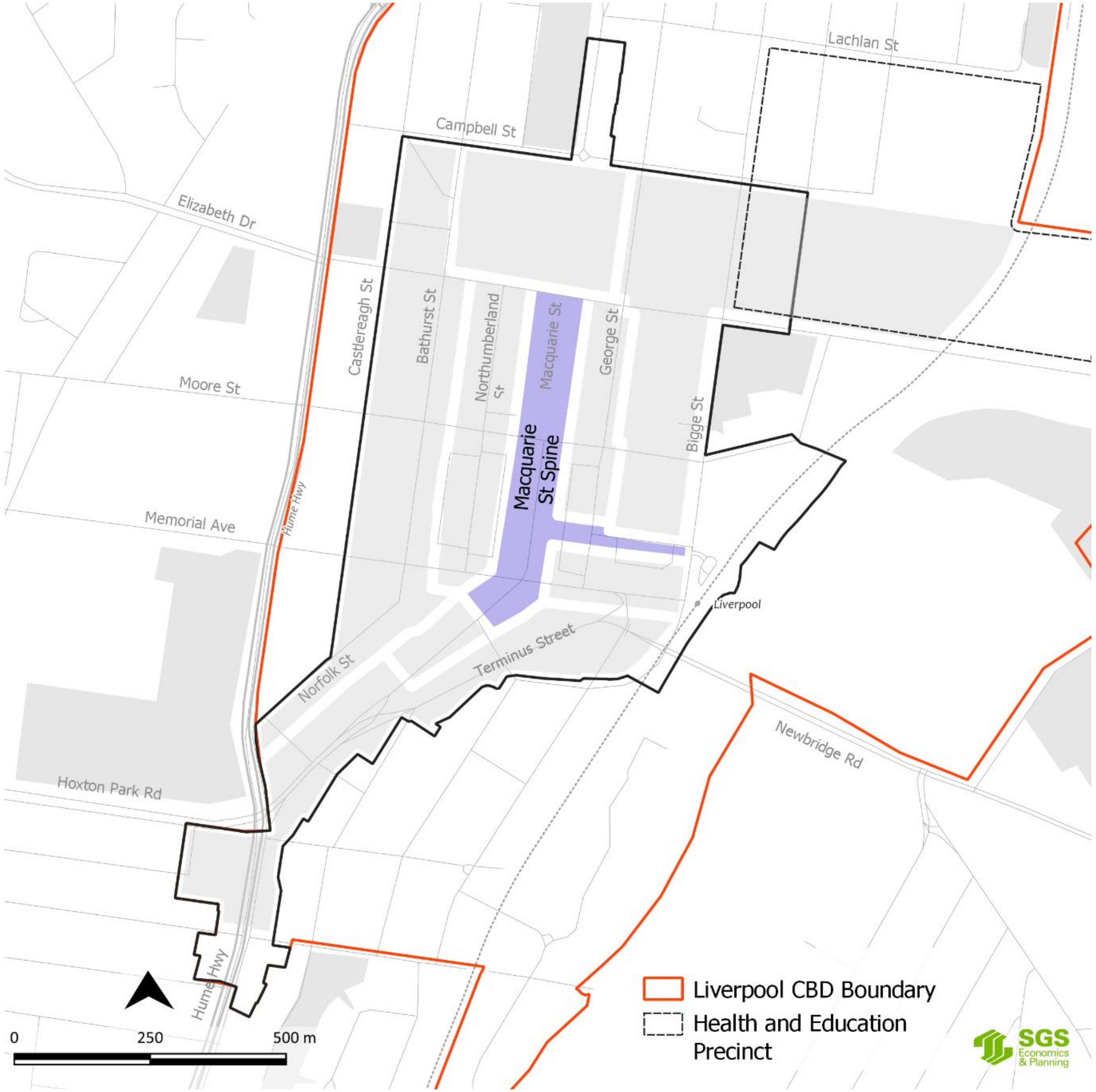
Macquarie Street is the heart and major retail street of the Liverpool City Centre. It contains a variety of retail uses, with Westfield Liverpool at its northern end and Council's proposed Civic Place development at its southern end. The Macquarie Street Spine includes Railway Street, which connects Macquarie Street to the Liverpool Railway Station.

Future retail character

The Macquarie Street Spine precinct should continue to be the beating retail heart of the Liverpool City Centre, with a fine grain character and a variety of retail uses. Its pleasant environment, position in the centre of the Liverpool City Centre and proximity to major uses like Westfield, Western Sydney University and Council's Civic Place development make it an ideal candidate for a future eat street, with a concentration of retail and hospitality uses.

Railway Street should be consolidated as the main walking route from the Liverpool Train Station into the Liverpool City Centre. Some restaurants and cafés along this road may be appropriate along with a mix of other retail uses.

The connection from Railway Street to Macquarie Street through the two arcades is an important walking route and should be retained in the future.



Macquarie Street Spine

Development guidelines

- Mixed use developments in this precinct should include smaller/fine grain retail spaces at the ground level, which lend themselves to main street retail and café, restaurant and hospitality uses.
- As much of the ground floor frontage on Macquarie Street as possible should be devoted to retail premises, with store frontages replicating the existing subdivision rhythm (generally around 7-10m wide and sometimes double this size).
- Additional retail premises may be appropriate in arcades behind Macquarie Street and connecting it to other streets.
- Premises should include features allowing them to be used as cafés and restaurants, including scope for appropriate services such as grease traps, power and water connections and sufficient size to split the space into a kitchen and separate dining area.
- Any office or service uses included in mixed use development should be located above the ground level to maximise the vibrancy and amenity of the streetscape in this part of the City Centre.
- The ground plane and streetscape throughout the precinct should also include wide footpaths to support pedestrian activity and allow for outdoor dining. All vehicular access should be from the rear of developments, although some on-street parking may be appropriate (apart from on the Macquarie Mall) where it does not interfere with the use of the street for outdoor dining and walking.
- A major mixed use development has been proposed on the corner of Moore Street and Macquarie Street. This presents significant opportunities and should activate the Mall during and after businesses hours through curation of ground floor tenancies and design integration with the Mall.
- The potential for temporary activation and pop-up retail should be considered in the event of retail vacancies.

Development example: The Mode3 development in Braddon ACT contains fine grain retail at the ground level below apartments, with vehicular access provided from a rear driveway. There are also smaller retail premises located within the building.

Source: Google Street View 2019

Example: The Liverpool Plaza contains multiple retail premises with frontages on the Macquarie Mall with a width which reflects traditional retail streetscapes.

Source: SGS 2019

Westfield Precinct

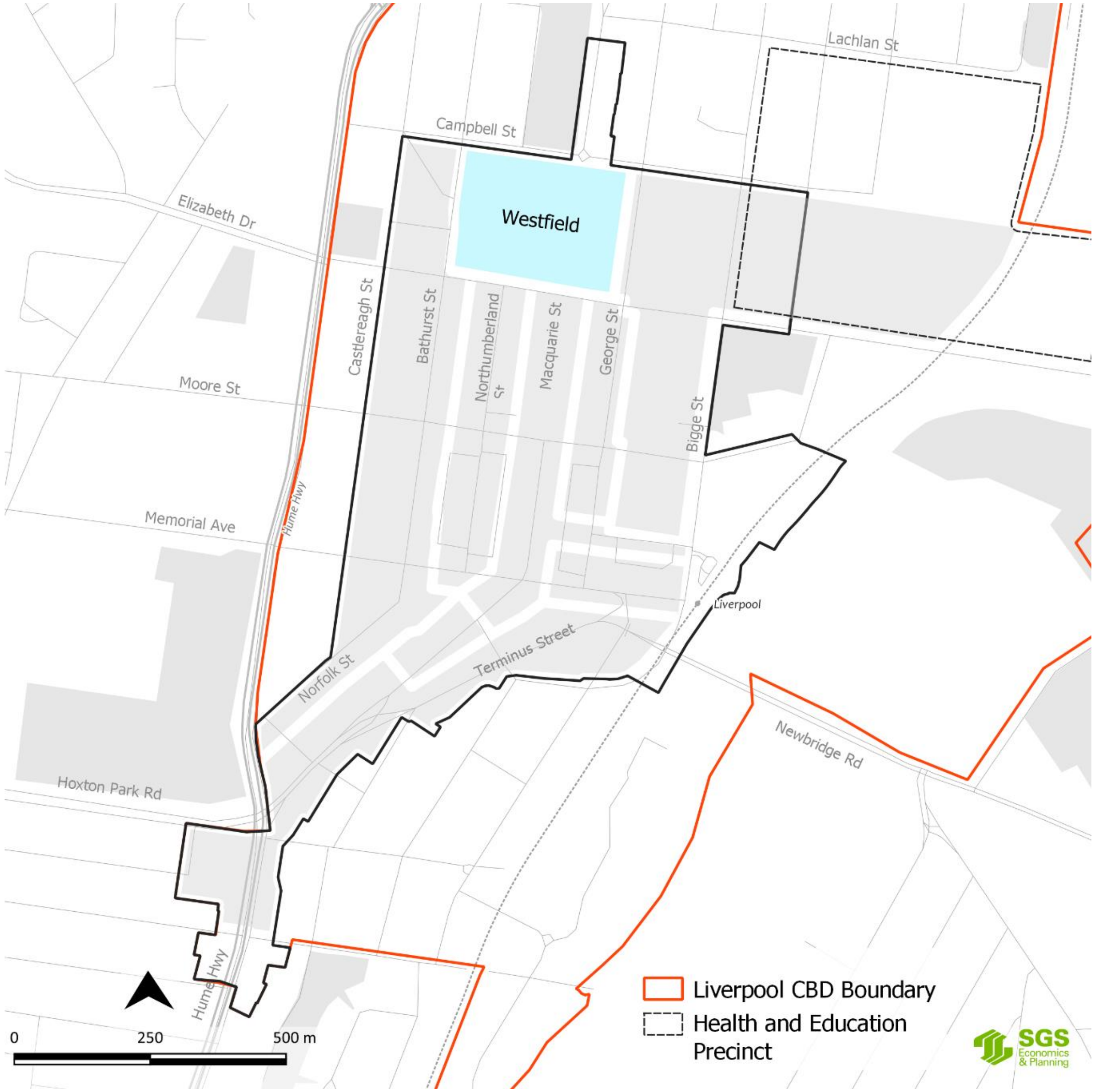
Future retail character

Westfield is likely to continue to play an important role as a regional retail centre for the Liverpool local government area and surrounds. Westfield Liverpool is likely to continue to function reasonably separately from the rest of the City Centre in a retail sense, and offers a different retail experience.

Westfield's proposed expansion to increase its role as a destination for food and entertainment could allow the wider City Centre to benefit if it creates an interlinked eat street/retail spine from Westfield Liverpool through to the Macquarie Mall.

Any significant expansion of floorspace in the Westfield should build the success of the rest of the City Centre rather than harm it. This includes through:

- Westfield not reproducing the kinds of retail offerings and experiences available elsewhere in the City Centre,
- Ensuring that pedestrian wayfinding to and through Westfield Liverpool and into the rest of the City Centre is improved & not impacted,
- Improving integration between Westfield and the surrounding public domain, and
- Minimising development impacts such as through increases in traffic.



Westfield Precinct

Development guidelines

- Dining and entertainment facilities in Westfield Liverpool should be directly connected to the Macquarie Mall to create opportunities for the emergence of an integrated dining precinct.
- Future development of the Westfield precinct should include efforts to improve pedestrian and visual connectivity to the rest of the City Centre. In particular:
  - Walking connections should be improved from the apartment developments to the north through to Macquarie Street to the south and the rest of the commercial uses in the Liverpool City Centre.
  - Active interfaces between the shopping centre and the external streetscape should be prioritised where possible, particularly to the south along Elizabeth Street. This would improve the perception of safety after hours.
- Pedestrian wayfinding to and through Westfield Liverpool and into the rest of the City Centre should be improved through signage and architectural treatments at entrances. Wayfinding to available parking should also be improved.

Example: Westfield Chatswood opens directly onto the Chatswood Mall on Victoria Avenue, creating a single retail and dining precinct.

Source: Google Street View 2019

George Street Precinct

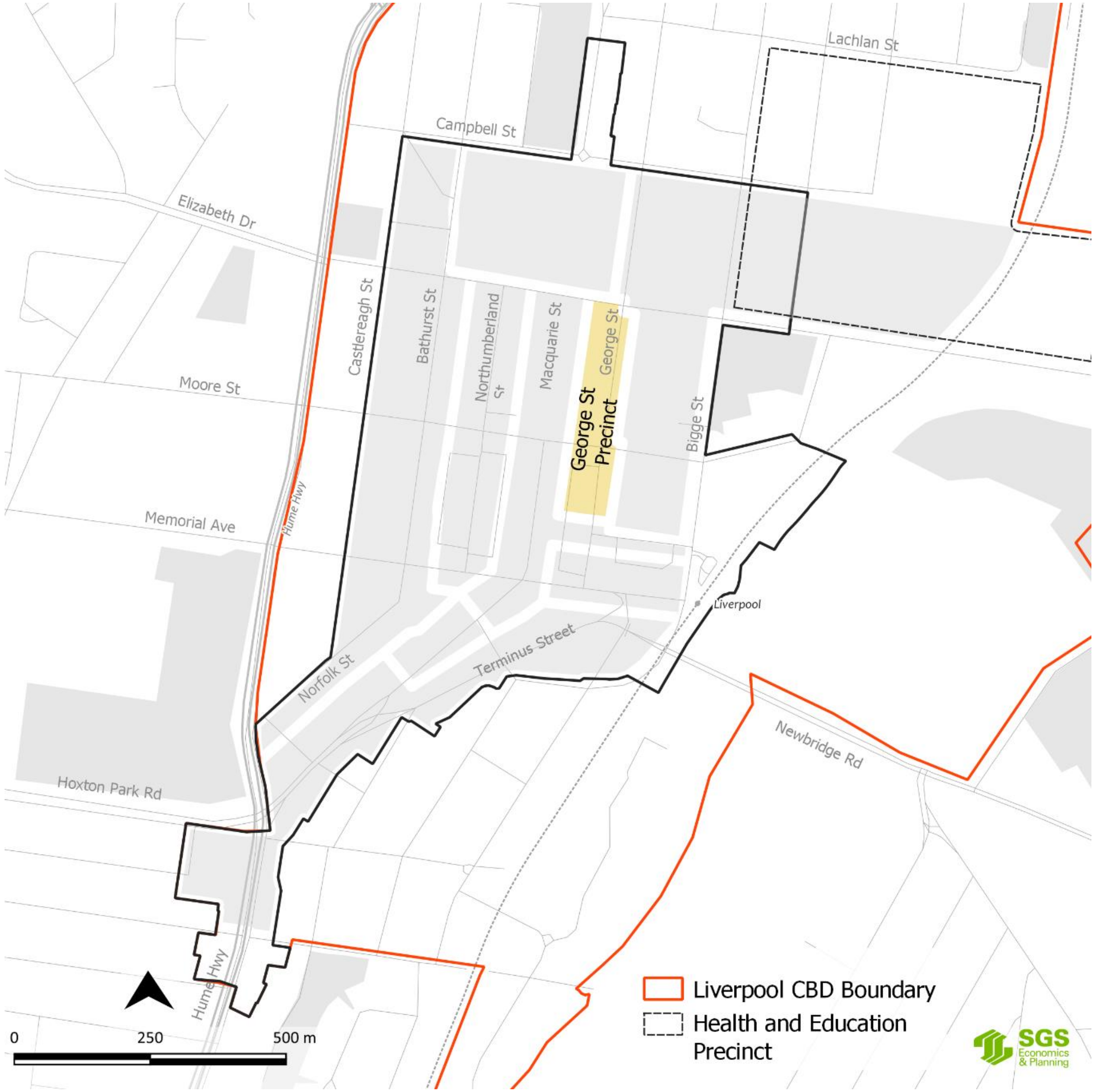
Future retail character

This precinct should retain its current role as an Indian fashion precinct which is unique to the Liverpool City Centre and which draws people from across Sydney, Australia and internationally. This will require the retention of the fine grain retail streetscape.

This precinct should not aim to reproduce the broader retail offering of Macquarie Street or to become an additional eat street. Provision of some space suitable for services and more diverse retail uses consistent with the current use profile is appropriate.

Development guidelines

- Mixed use developments should provide retail spaces which cater to specialised fashion premises. These should be of a similar size to current premises, with appropriate sizes determined by consultation with current retailers when development is proposed.
- Proponents for large developments which could displace specialty fashion retailers should consult with current specialty fashion retailers to determine what development features are important for them, with details included as part of a development application.
- Spaces suitable for some services, restaurants and cafés may also be provided at ground level, but most offices and service spaces should be provided above the ground level.
- Servicing and vehicle crossovers should be provided to the lanes behind George Street where possible.
- Existing mid-block arcades and access ways between George Street and Macquarie Street should be maintained.



Terminus Street Precinct

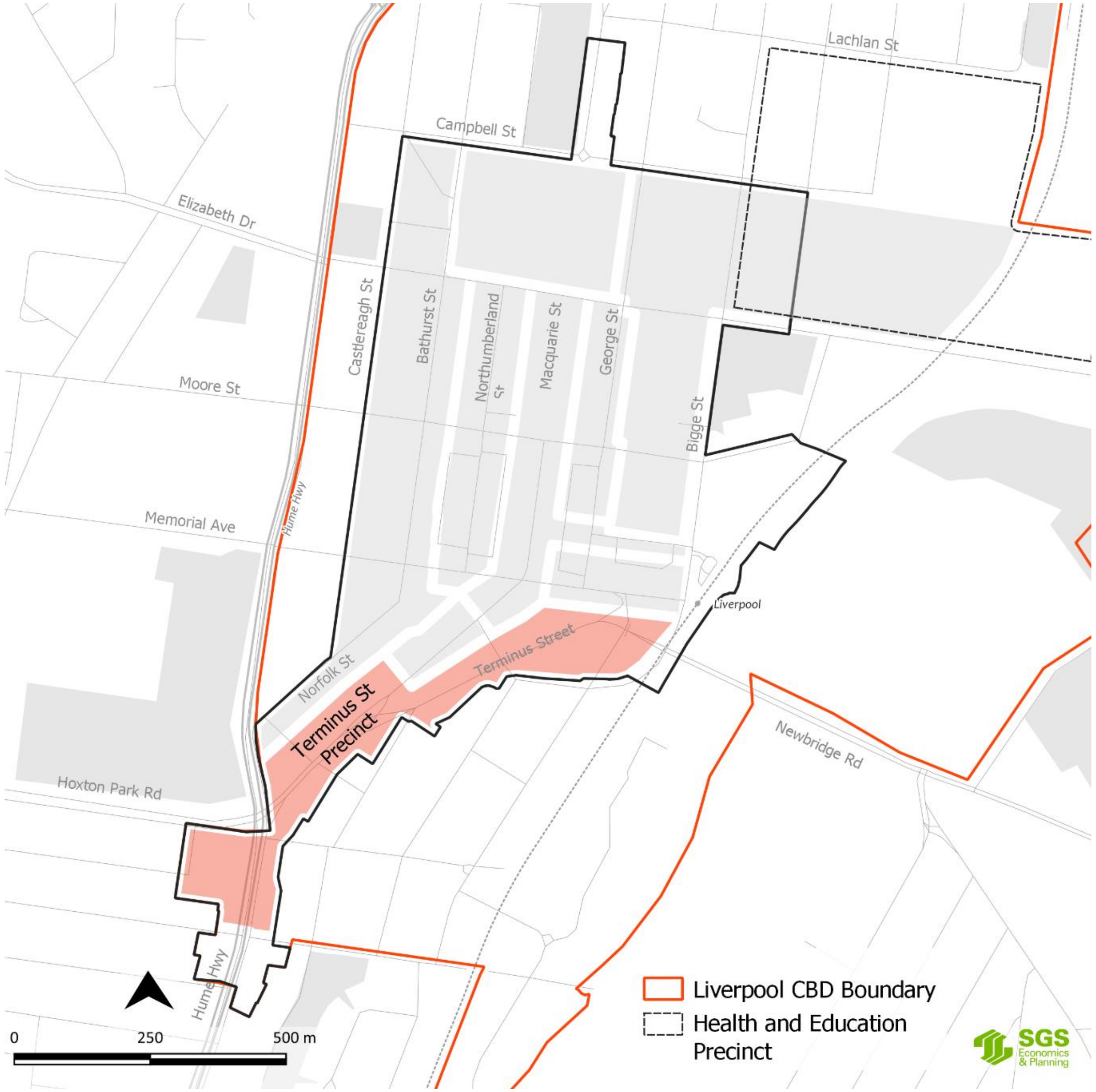
Future retail character

The Terminus Street Precinct should have a specialised retail role which reflects its poor retail amenity. Small retail tenancies, cafés, restaurants and shops that depend on passing trade would perform poorly and should be avoided as part of future developments.

Capitalising on its role as a major thoroughfare for vehicular traffic, this precinct should cater to larger format retail, showrooms and service uses. Higher-end car showrooms, homewares and furniture stores and gyms benefit from high levels of exposure and would be ideal. Other shops with larger floorplates like Officeworks which provide a destination retail offering would also benefit from this location.

Commercial services catering to the surrounding residents would be appropriate in the place of retail development, as would commercial office space.

Parts of the Terminus Street Precinct are relatively far from Westfield Liverpool and demand for grocery retailing will increase as a result of the significant population growth already occurring. Convenience food stores or a small supermarket to cater to the working and residential population in this part of the City Centre would cater to this need.



Terminus Street Precinct

Development guidelines

- Future development in this precinct should not include a large number of small-floorplate retail facilities.
- Retail premises should have large floorplates and high ceilings which could be used for showrooms and larger-format retail. Floorplates of 500-1,000sqm may be appropriate for these uses, with high ceilings (>4m), although this will depend on the particular tenant profile targeted as detailed in a development application.
- Retail floorplates should be consolidated in a single part of any development site to allow them to be combined or split into smaller premises as appropriate, providing flexibility in future use.
- Customer parking is likely to be required, as businesses that would be attracted to a high exposure location are likely to be the kinds of premises that people visit purposefully and infrequently rather than those which would depend on passing trade. Parking should be provided in a way which is integrated with the design of the development, but is clear and navigable for customers.
- Loading docks are likely to be required to support any large retail developments and to increase retail flexibility, but access should not be provided from Terminus Street. Specific traffic arrangements will be subject to further discussion with Council officers.

Example: Woolworths Green Square is located at the bottom of a shop-top housing development.

Source: SGS 2019

Example: The East Village development in Zetland contains an Audi service centre in a mixed use development, adjoining an Audi sales centre in an adjacent building

Source: https://www.dasco.net.au/gallery/east-village-Zetland-4-defries-ave-nsw=2017/

Macquarie Street South Precinct

Future retail character

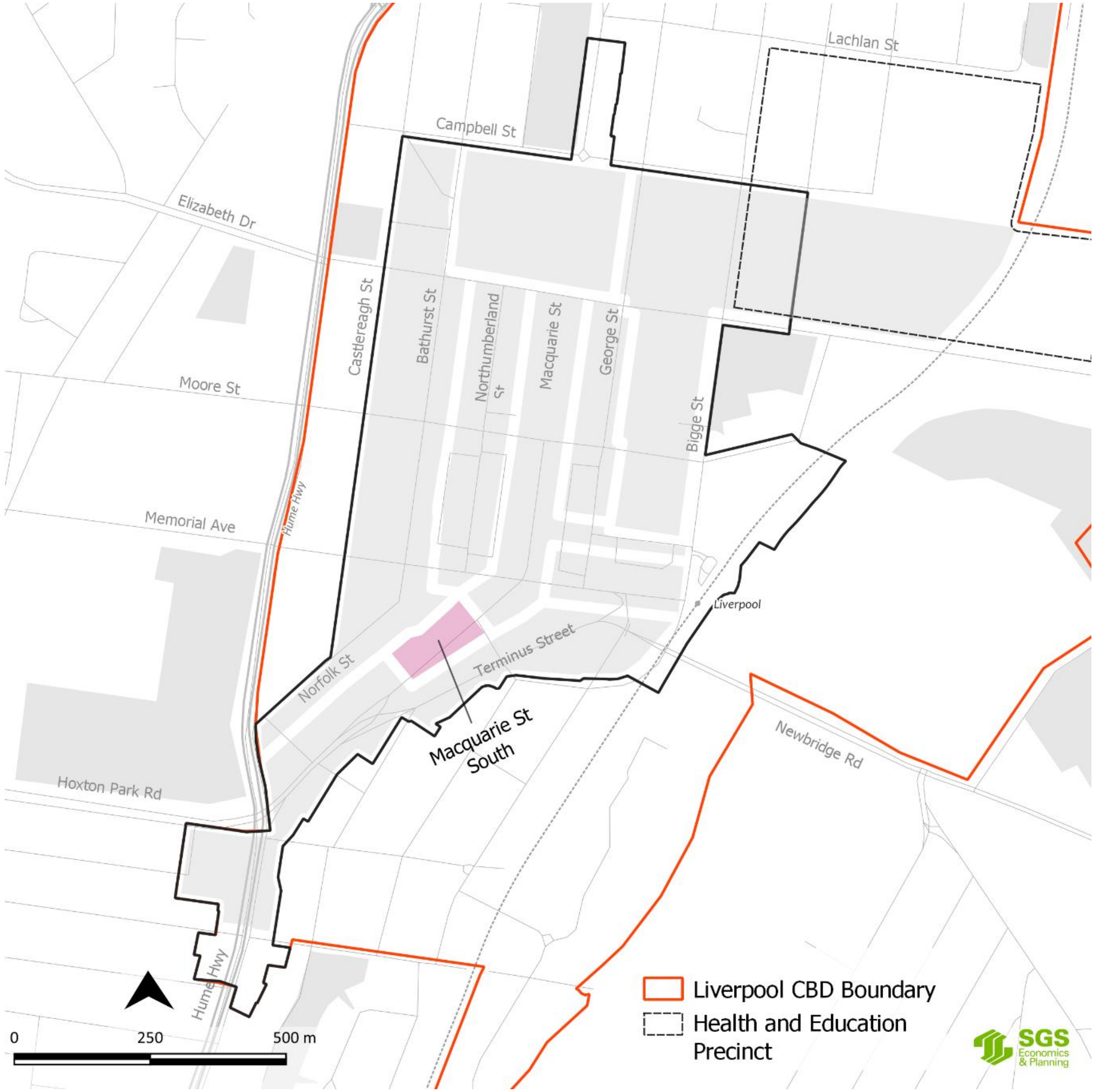
This area should act as a future extension of the Macquarie Street Spine, but only in the event of improvements to the public domain and amenity of this part of Macquarie Street.

Existing retail provision should be maintained in mixed use developments, although larger stores and restaurant spaces should be provided than in the Macquarie Street spine, reflecting the opportunities provided by the larger lots in this area and a transition in uses between the Macquarie Street Spine and the Terminus Street Precinct.

An important requirement for development in this precinct should be to include elements that improve the public domain and pedestrian environment, such as tree planting, street furniture, and facilitating more pedestrian connections between the two sides of Macquarie Street.

Development guidelines

- Provide a mix of retail premises at the ground level, with some larger premises than those which would typically be provided further north on Macquarie Street.
- Contribute to the improvement of the public domain and pedestrian environment .
- Provide connections to the Norfolk Serviceway in larger developments, increasing pedestrian permeability.
- Some commercial and services premises may be provided at the ground level, as well as above the ground level.



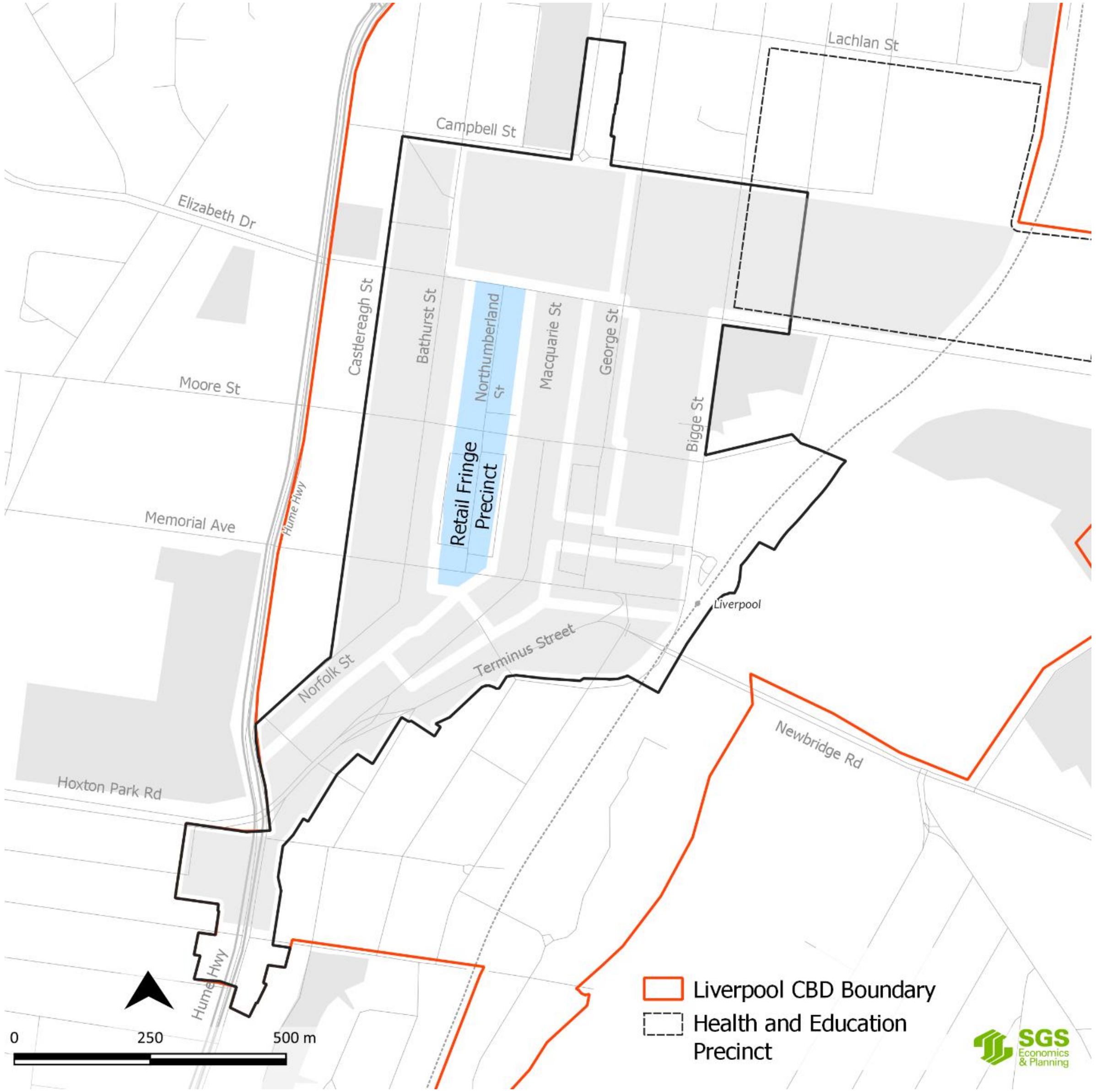
Retail Fringe Precinct

Future retail character and development guidelines

In future the Retail Fringe precinct should maintain its current use profile, with a mix of main street retail uses, grocery stores and some cafés and restaurants accommodated alongside services and commercial office employment. This precinct should accommodate more commercial and service uses compared to Macquarie Street, maintaining the retail primacy of Macquarie Street.

Development guidelines

- Mixed use developments in this precinct could include floorspace for services and commercial office uses as well as some retail uses.
- Larger developments should include a mix of ground floor uses instead of only small retail premises.
- Existing connections to Macquarie Street should be maintained and enhanced where possible.



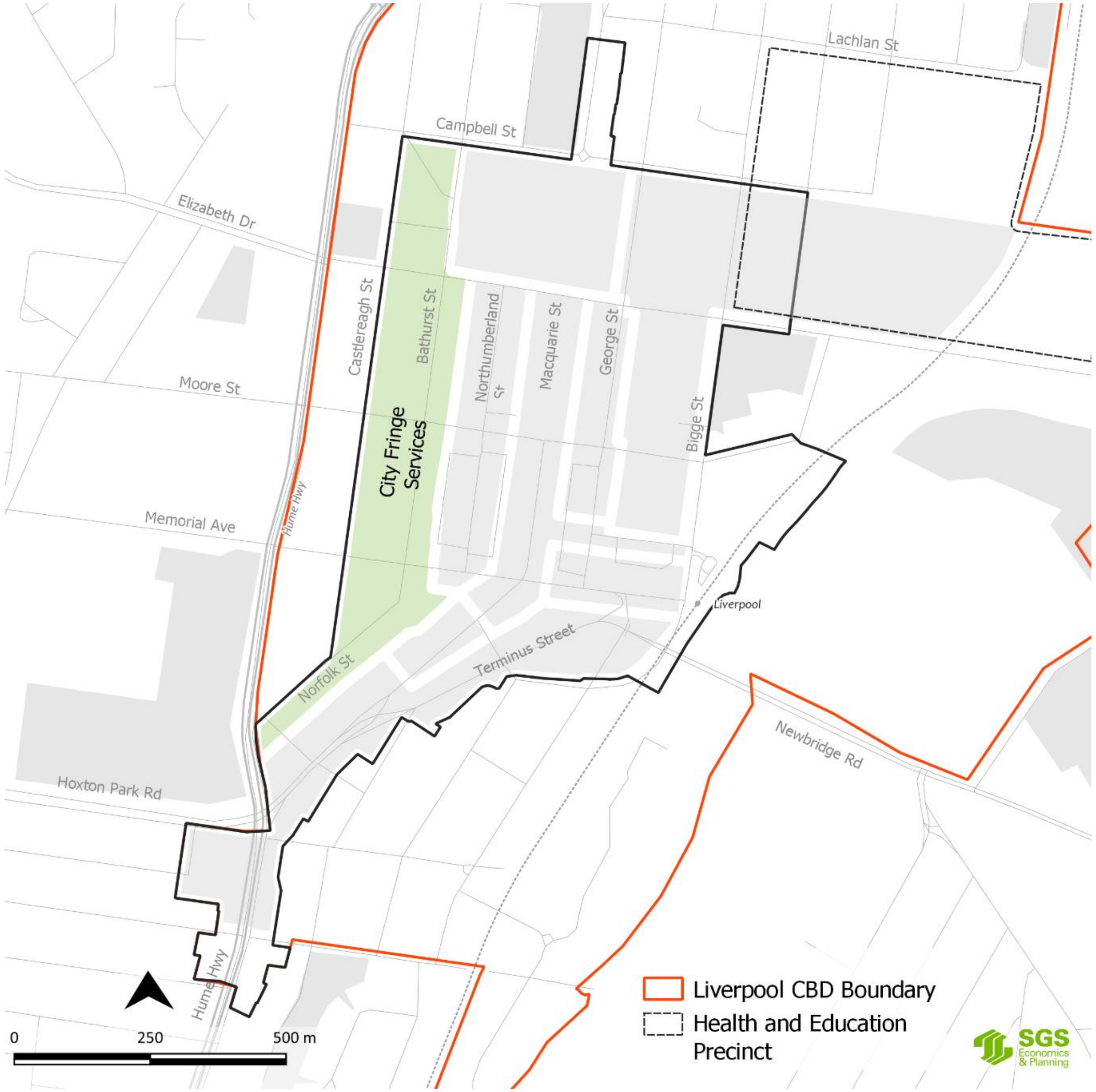
City Fringe Services Precinct

Future retail character

The City Fringe Services precinct should maintain its role providing predominantly spaces for offices and services uses. It should continue to act as an interface between the core of the City Centre and residential areas to the west.

The existing apartment development on the western side of Bathurst Street along with the relatively high traffic levels along the street limit this precinct's potential to provide a vibrant retail environment in the future.

There should be limited provision for retail premises in the area. Any significant increase in retail floorspace in this area is likely to either be vacant for a long period of time, or to come at the expense of retail concentration on Macquarie Street and surrounding streets.



City Fringe Services Precinct

Development guidelines

- Mixed use developments in this precinct should generally not include space for retail premises, although a limited number of spaces which could be used by cafés, restaurants or convenience based retailers may be appropriate.
- In cases where there are existing retail premises or restaurants, similar amounts of retail floorspace should be provided to current provision. However, the commercial components of mixed use buildings should instead focus on space for services and commercial offices.
- A development in either the southern part of this precinct or in the Terminus Street Precinct could provide a small supermarket which is accessible from the southern end of the City Centre.

Example: Mixed use development in Burwood with consolidated commercial office space forming a podium below apartment towers.

Source: SGS 2019

Example: A commercial development in Surry Hills which contains a small café and restaurant at street level along with a commercial frontage.

Source: SGS 2019

Scott Street Precinct

Future retail character

As a precinct at the fringe of the City Centre, the Scott Street Precinct should have a mixed role comprising some commercial uses and some hospitality uses. Restaurants and cafés will cater to the users of the commercial developments in this area but should not seek to replicate the eat street experience on Macquarie Street.

Future development in this area should allow for some hospitality tenancies, appropriate to cater to the nearby commercial worker population. A small amount of retail space in the western end of the precinct may also be appropriate.

Development guidelines

- Provide a mix of retail premises suitable for cafés or restaurants at the ground level, along with some commercial uses.
- Any major developments (including the proposed development at the corner of Scott and Bigge Streets) should connect to the Macquarie Street Spine precinct, consolidating the role of Railway Street as a major access route to Macquarie Street.

Civic and Health Precinct

Future retail character

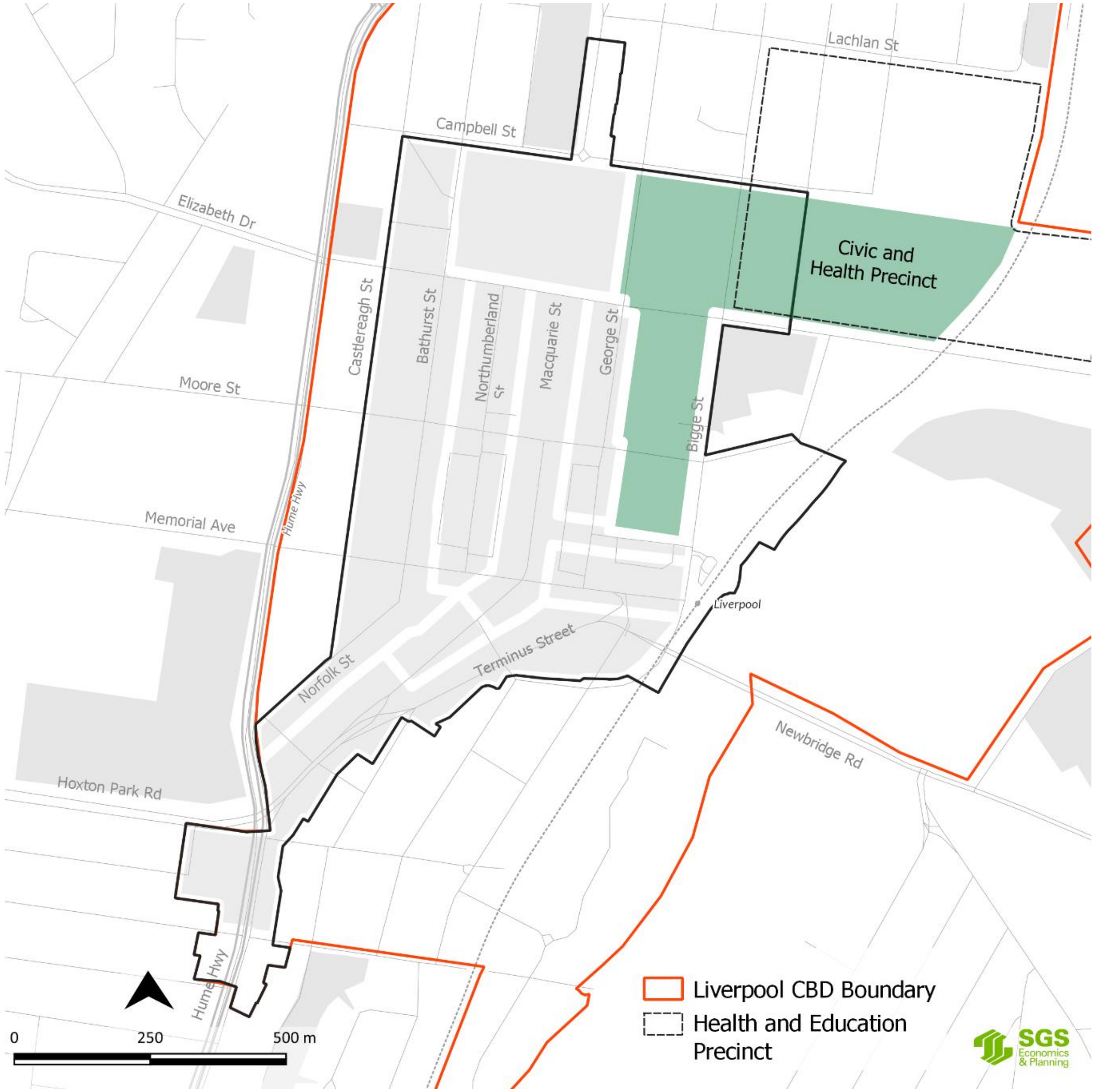
In future this precinct should retain its existing role and function as an area primarily for civic uses, health and education. While the Liverpool City Council offices and library are planned to be moved to the Civic Place Development, this precinct currently houses a variety of other institutions including the Liverpool Primary School, community centres, Liverpool Hospital, TAFE NSW, the All Saints Catholic Church and College, Liverpool Court House and Police Station and many small medical premises. These uses and services are important for employment and providing services at both a local and regional level.

Café or restaurant spaces could be considered along Bigge Street fronting Bigge Park, however retail uses should be relatively limited across the precinct. A focus should also be on enhancing connections between the precinct and Macquarie Street, while not undermining the primacy of the Macquarie Street Spine for retail uses.

The continued evolution of the Liverpool Health and Education Precinct, including the construction of a new private hospital, will lead to more people working in this area. It is relatively accessible from Macquarie Street and Westfield Liverpool, which should remain the primary destinations for retail services catering to these workers. Additional café or restaurant space near the Hospital would be appropriate to cater to staff, visitors and outpatients, but there is limited opportunity for this kind of development in the immediate vicinity.

Development guidelines

- Developments should focus on providing commercial and service spaces, particularly those which cater to medical practices.
- Retail or hospitality space that is included as part of mixed use developments should be at the ground level and cater for smaller tenancies, focusing on attractive frontages such as Bigge Park.



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LIVERPOOL CITY CENTRE RETAIL

APPENDIX – RETAIL CONTEXT

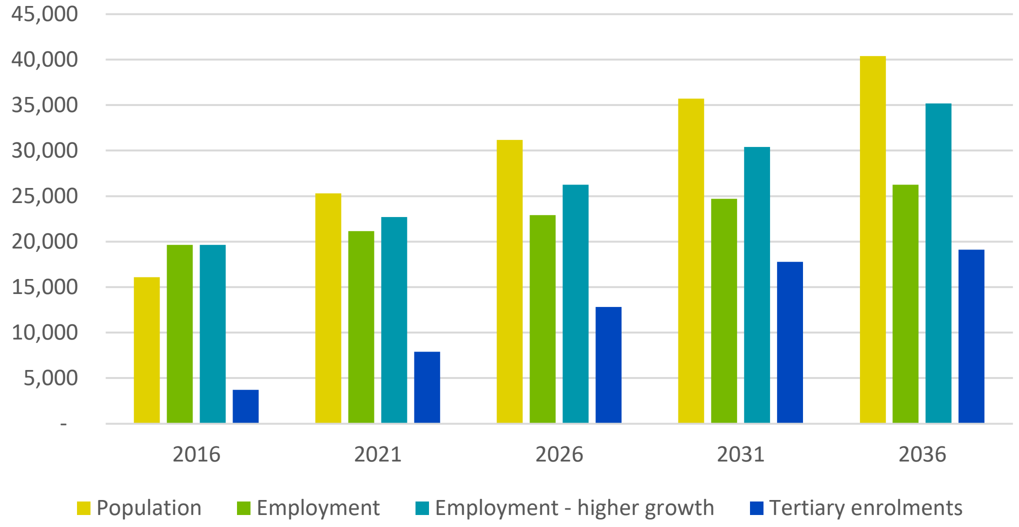
SGS Economics & Planning

Factors driving future retail demand

Future increases in retail demand in the Liverpool City Centre will be driven by:

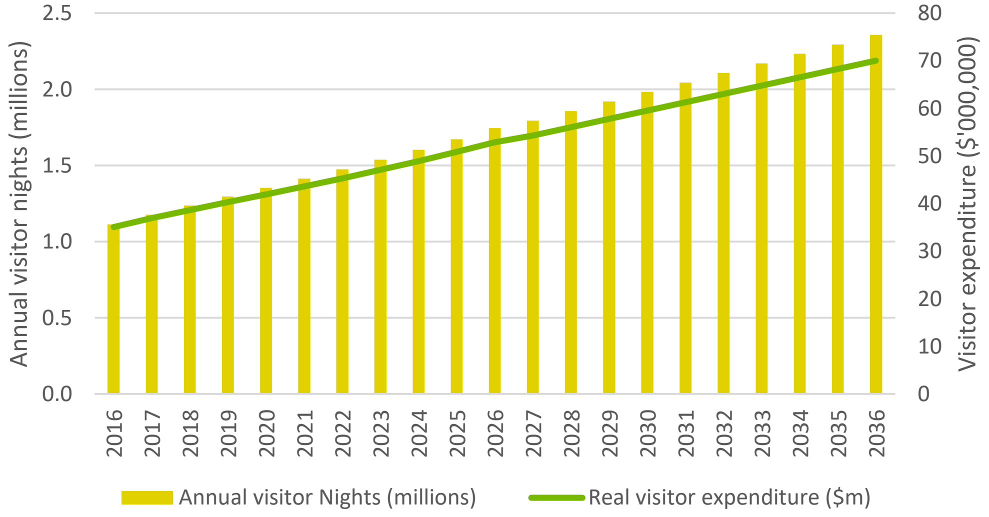
- **Population growth in the Liverpool City Centre**, with the population forecast to increase by 251% from approximately 16,200 in 2016 to approximately 40,500 in 2036.
- **Population growth in South-West Sydney** more broadly, with the Liverpool LGA forecast to grow by 69% from approximately 212,200 to 358,900 between 2016-2036, and the Camden LGA forecast to grow by 190% from approximately 80,500 to 233,300 between 2016-2036.
- **Employment growth in the Liverpool City Centre**, which is projected by Transport for NSW to grow at 1.5% per year, adding approximately 6,600 jobs between 2016-2036. Under a higher growth scenario reflecting recent development, employment would grow at 3% per year, adding around 15,500 jobs between 2016-2036.
- **Growth in tertiary enrolments** from approximately 3,700 in 2016 to approximately 17,700 in 2036, with the University of Wollongong, Western Sydney University, University of NSW and TAFE NSW all expanding their presence and the potential for another university to open.
- **Tourist visitation and spending**, which is projected to double between 2016-2036 across the Liverpool LGA.

Forecast population, employment and tertiary enrolment growth in the Liverpool City Centre



Source: SGS 2019, Forecast.id 2019, Transport for NSW 2016 *LU16 Projections*

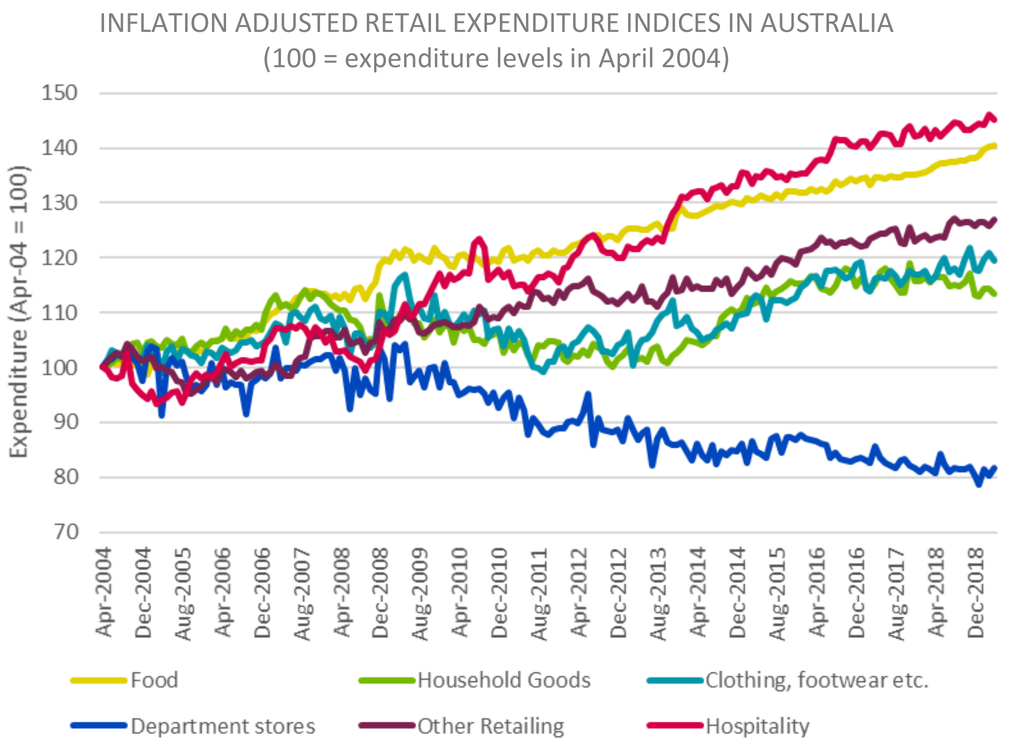
Forecast tourist visitation and expenditure in the Liverpool LGA



Source: SGS 2019, Tourism Research Australia 2019

Retail trends

Retail trend	Implication for retail in the Liverpool City Centre
Online retailing is growing and competing with traditional retail stores	Physical stores need to be attractive places to visit and shop, offering experiences that online retailing cannot. A mix of retail premises and services, is needed in new developments to maintain high levels of foot traffic as some retail sectors decline, including a strong dining and hospitality presence.
Large shopping centres, some of which are not located in traditional retail centres, are competing with main street retailers. In combination with online retailing, this presents a challenge to main street retail viability.	The unique experiences in retailers outside of Westfield Liverpool must be maintained and leveraged. Existing destination retail offerings like the Indian fashion precinct on George Street offer an example of a specialised and unique retail experience.
Consumer spending on hospitality and fresh food is increasing much more quickly than spending in other retail sectors (see the figure to the right)	Some retail formats, like department stores, may decline, while supermarkets will become more important as anchor tenants.
Café culture is making eat streets and dining precincts increasingly popular	There are good prospects for cafés and restaurants in places like Macquarie Street with a pleasant public domain.
The supermarket sector is diversifying, with new entrants to the market competing with Coles and Woolworths and smaller stores being opened in densely populated areas.	Continued apartment development could create demand for local small-scale supermarkets.
The night time economy is becoming increasingly important, including longer retail trading hours.	Liverpool has the ingredients for a strong night time economy, and an increased presence of students and workers will increase demand for after-hours activity.



Source: SGS 2019, ABS 2019 – *Retail Trade Australia*

Population growth

Rapid population growth has occurred recently in both the Liverpool City Centre and the Liverpool LGA more broadly. As noted earlier in this section, this growth is forecast to accelerate in the future, with dramatic increases in population forecast between 2016-2026 and 2026-2036 which are much larger than the increase which occurred between 2006-2016.

Implications for retail in the Liverpool City Centre

Population growth will drive demand for increased retail spending, particularly for groceries and convenience retailing.

Apartment developments in the Liverpool City Centre will likely attract more young people, professionals and students to the area, increasing demand for food and beverage retailing.

RECENT AND FORECAST POPULATION GROWTH

Area	2006	2016	Change 2006-16	Forecast growth 2016-26	Forecast growth 2026-36
Liverpool City Centre	10,523	16,228	5,705	15,100*	9,200*
Liverpool LGA	164,602	204,326	39,724	64,738	81,901

Source: SGS 2019, ABS Census 2006, 2016, Forecast.id 2019

Employment profile

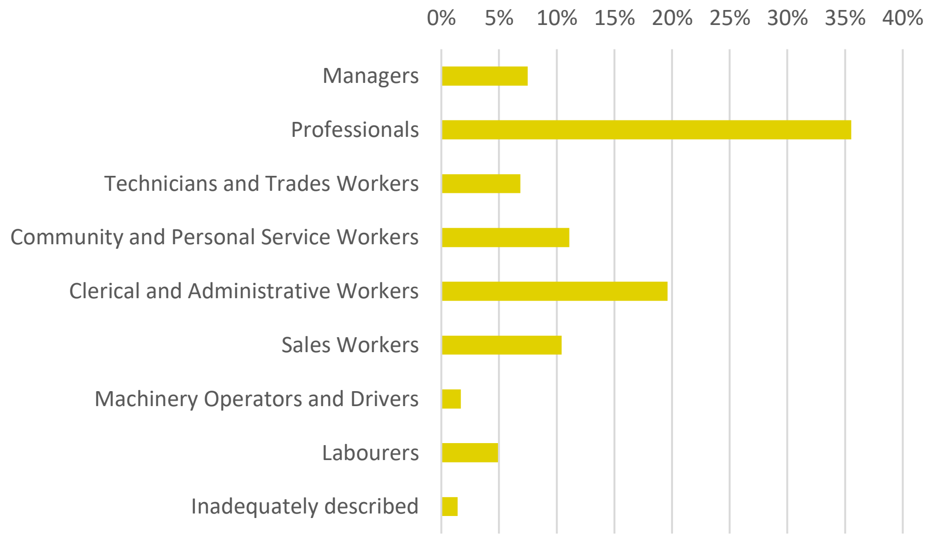
Transport for NSW estimate that approximately 19,150 people worked in the Liverpool City Centre in 2016.

There are many professionals who work in the Liverpool City Centre, which has a regional-scale administration, civic and professional services role. There are also many sales, community and personal services and administrative workers.

Implications for retail in the Liverpool City Centre

Liverpool City Centre is relatively compact and has a wide range of services and retail, making it ideal for workers to shop and access services in lunch breaks and before and after work. An educated and professional working population creates opportunities for higher-value food and beverage offerings as well as for general expansion of retail and service offerings.

OCCUPATIONS OF WORKERS IN THE LIVERPOOL CITY CENTRE



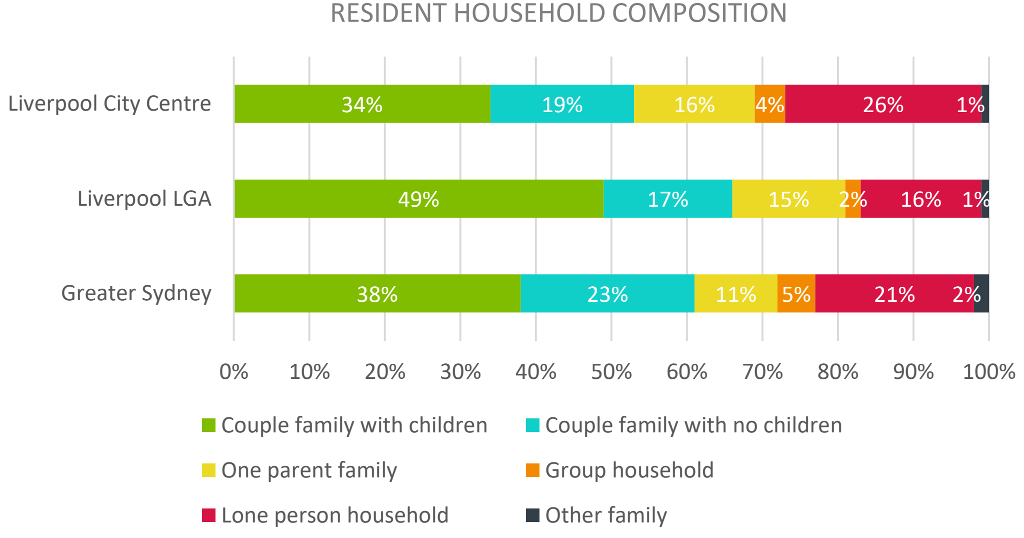
Source: ABS Census 2016

Household types

Despite almost all of its residents living in apartments, the Liverpool City Centre accommodates a wide diversity of household types, with a household composition similar to that of Greater Sydney more broadly.

Implications for retail in the Liverpool City Centre

The diversity of household types in the Liverpool City Centre is likely to support a wide retail offering. This includes shops and services catering to young couples and local workers as well as to families and younger people living in group households.



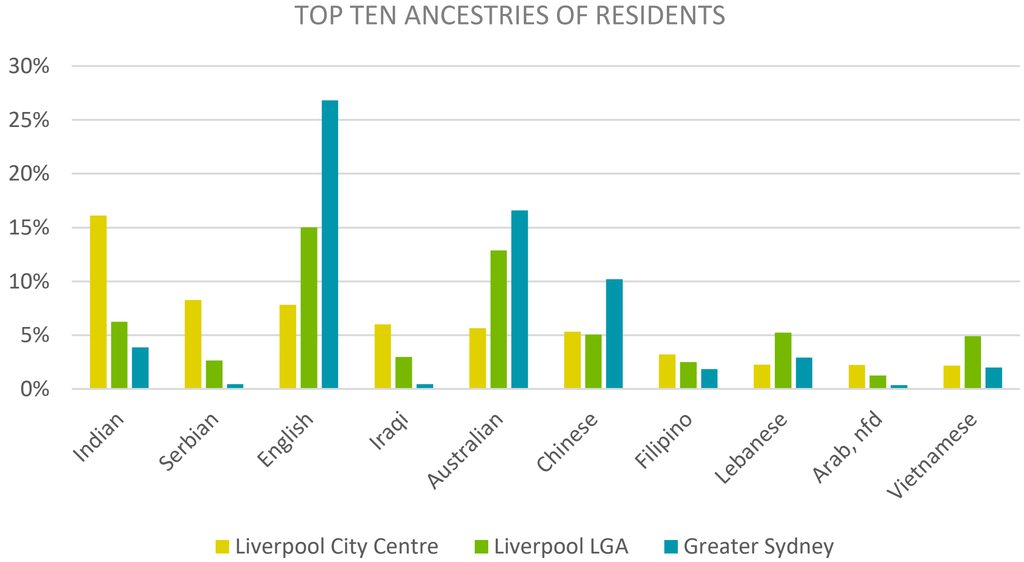
Source: ABS Census 2016

Ethnic diversity

The Liverpool City Centre and Liverpool LGA have highly diverse populations. There are 20 ancestries that make up 1% or more of the Liverpool City Centre population, compared to only 13 in Greater Sydney. There are particularly high concentrations of people of Indian, Serbian and Iraqi descent compared to Greater Sydney, and these groups are associated with specific retail offerings in the Liverpool City Centre, including grocery stores, supermarkets, restaurants, fashion stores and other specialty retail stores.

Implications for retail in the Liverpool City Centre

A multicultural retail offering is an important part of the Liverpool City Centre's retail character, bringing people to Liverpool from a large area and a wide variety of backgrounds. There are opportunities to build on this role in the future.



Source: ABS Census 2016

Socio-economic advantage and disadvantage

The Liverpool City Centre and surrounds have relatively high levels of socio-economic disadvantage, although disadvantage is lower where new apartment development has occurred. Continued apartment development is likely to decrease the average socio-economic disadvantage of the Liverpool City Centre.

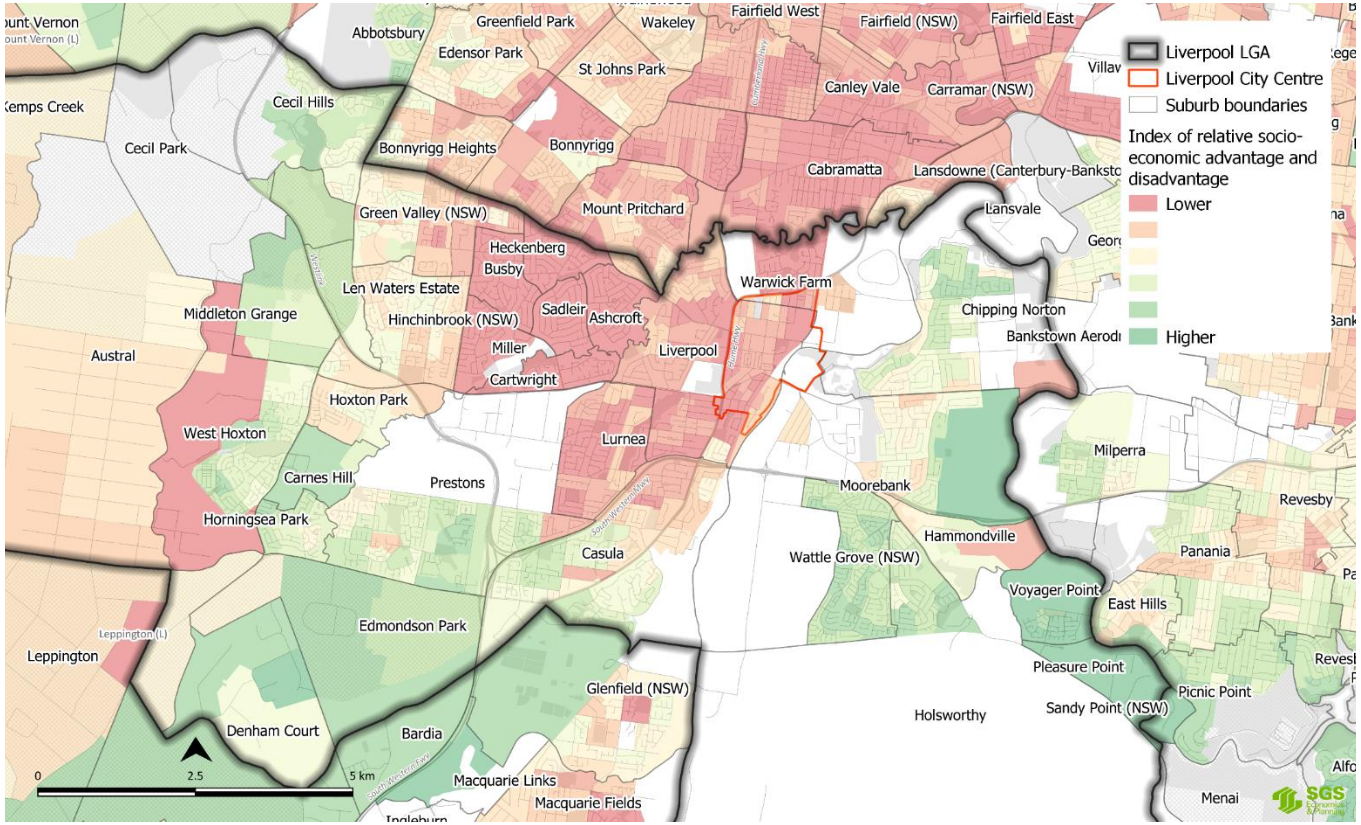
Nearby suburbs to the east and west of the Liverpool City Centre are more socio-economically advantaged.

Implications for retail in the Liverpool City Centre

People who are more socio-economically advantaged generally have higher discretionary incomes, so a change in demographic profile in the Liverpool City Centre would increase retail expenditure and support higher-value retail premises.

The higher levels of advantage in surrounding suburbs could support more dining and hospitality premises as the Liverpool City Centre is the most natural place for people from surrounding suburbs to shop and go out for food and entertainment.

THE 2016 SEIFA INDEX, A MEASURE OF RELATIVE SOCIO-ECONOMIC ADVANTAGE AND DISADVANTAGE



Source: ABS 2019

LIVERPOOL CITY CENTRE RETAIL

APPENDIX - OPPORTUNITIES & CONSTRAINTS

Aspects of a successful mixed-use precinct

The table on the right illustrates the features that influence the competitiveness of retail precincts for different kinds of businesses. These considerations should influence the intended tenant mix in mixed use developments.

Convenience retail refers to small supermarkets, convenience stores, grocery stores and other retail premises which provide for the day-to-day retail needs of the local population. It is most important for this kind of retail to be near the population it will be serving, and it generally has a relatively local catchment.

Regional retail refers to retail premises with a large catchment which people would travel to shop at, but which they would not access every day. As these premises have large catchments and most people in the Liverpool LGA would drive to complete their shopping, it is most important for this kind of retail to be near main roads and car parking. A minority of retail trade is likely to come from within a walking catchment.

Day-time dining premises need to be near the local population and other daytime users of a centre such as workers.

Night-time dining and entertainment businesses benefit from people going out for a drink or a meal after work, but also typically attract people from a broader area than day-time dining premises. As people are likely to travel to these destinations and they may serve alcohol, access to public transport is important along with proximity to parking. Walking routes to and from these access nodes with a high perception of safety are required much more than for daytime uses like regional retailing and day-time dining.

Local services such as dentists, accountants and real estate agents form a large part of the activity in centres like Liverpool. These uses support local retail and dining but are not as dependant on passing trade. However, they must be easily accessible to their clients to be successful.

Commercial developments support retailing and hospitality businesses in centres. Large commercial developments need good transport accessibility for their workers and the availability of services nearby to increase amenity for their workers. People must feel safe walking from the offices and businesses at night. The prestige of an area and its proximity to business clients is also important to attract commercial development, but is not captured in the above table.

Kind of business	Proximity to population density	Proximity to day-time anchors	Public transport accessibility	Proximity to parking	Well-lit and active walking paths	Main road accessibility
Convenience retail						
Regional retail (eg shopping centres)						
Day-time dining						
Night-time dining and entertainment						
Local services						
Commercial development						

A highly important factor in precinct competitiveness

A less important factor in precinct competitiveness

A relevant factor in precinct competitiveness

Planning controls and lot sizes

Following the amendments Liverpool Local Environmental Plan 2008 Amendment 52, FSRs of up to 10:1 are possible on large sites in parts of the Liverpool City Centre. This creates substantial development capacity (shown below under a range of assumptions), providing scope for the City Centre's development to outpace growth projections.

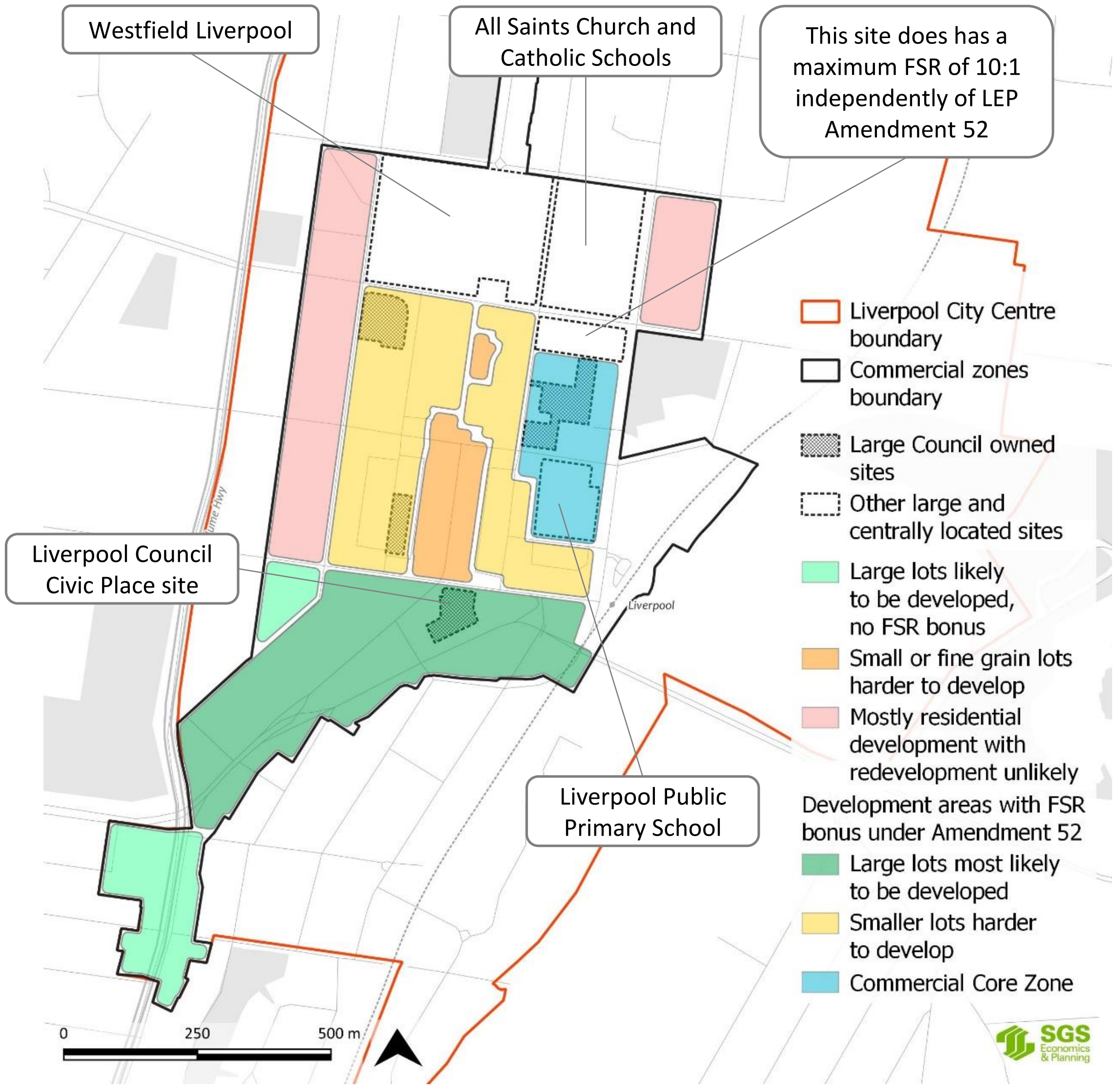
Capacity scenario	Low	Medium	High
Floorspace capacity (sqm)	1,289,352	1,324,315	2,923,620

The parts of the Liverpool City Centre which are most likely to be developed first have large lot sizes and fall under the bonus FSR provisions of the Liverpool LEP Amendment 52. The area south of Scott Street and Memorial Avenue has the largest lot sizes and is already being developed. Population densities will increase markedly here in the short-medium term. However, some parts of this area have a poor public domain and are relatively far from Liverpool Station, Westfield Liverpool and Macquarie Street. This makes them unsuitable for many kinds of retail development.

The next most likely places to develop are centred around George Street and Northumberland Street. These areas are more intensively developed and have smaller lots than those south of Scott Street and Memorial Avenue. However, development may occur in this area in the shorter term if developers can amalgamate sites.

Macquarie Street, particularly south of Moore Street, has small lots that would require amalgamation for development, and lower permitted yields under planning controls than elsewhere. This area is highly accessible, has high foot traffic and natural amenity and is bookended by anchor uses (Westfield, Western Sydney University and Civic Place).

The Commercial Core is highly accessible from Liverpool Train Station and contains several large properties. Residential development is not permitted in this area.



SWOB Analysis

The table on the right gives strengths, weaknesses, barriers and opportunities for retail development based on consultation with:

- Council officers,
- Real estate agents,
- Developers,
- Shopping centre operators, and
- Education providers.

Strengths

- Liverpool has a **compact, walkable core** with a grid structure, giving it the bones for future growth.
- Liverpool has a **regional-scale retail and service role** which brings many people to the Liverpool City Centre, including for shopping, and makes it a well-known destination.
- Liverpool houses and is visited by a great **diversity of ethnicities and kinds of people**, giving it a dynamic and diverse local character.
- **Unique retail offerings** such as the Sari shops on George Street and ethnic cuisines bring people to Liverpool from across Sydney.
- The presence of Western Sydney Airport Co and Liverpool's geographic position situate it as the **gateway to the future Western Sydney International Airport**.
- Liverpool is **centrally located** on the railway network and near many major roads.

Weaknesses

- **Many people shop in Westfield Liverpool but not in other parts of the City Centre**, drawing energy off the streets and reducing the viability of retailing outside of Westfield Liverpool.
- **Outside of Westfield Liverpool, Liverpool's retail offer is relatively limited**, with many discount stores and few bars and high-value hospitality businesses.
- **Traffic congestion and limited parking** can make accessing Liverpool City Centre difficult.
- Liverpool is **cut off by major transport corridors** from the Georges River, open space and from housing to the south.
- Many parts of the Liverpool City Centre have a **lack of retail amenity and an unfriendly public domain** which does not encourage people to linger.
- Some of the residential areas around Liverpool have a **low socio-economic status** and some demographic groups monopolise public spaces while spending little money.
- Some parts of Liverpool have a **low perception of safety**, particularly after hours. Existing uses contribute to this perception.
- People come to Liverpool for business or medical services, but do not visit retail premises and leave at night when activity declines.

Barriers

- **Fragmented land-ownership** means that multiple sites must be assembled for development, and local owners are often unwilling to sell their properties.
- Many people who live nearby have a **poor perception of the Liverpool City Centre** and do not regard it as a dining or entertainment destination. This is a self-perpetuating cycle limiting hospitality focused development.
- Many developers regard ground-floor retail as a requirement rather than an important asset, and so build spaces that may not attract tenants.
- **Regulatory barriers** may hinder small and potential retail business owners and operators.
- **Other major centres in Western Sydney** compete with Liverpool and may draw people away from it if development in Liverpool does not occur.

Opportunities

- Development occurring in and around the Liverpool City Centre could cause **demographic change**, bringing wealthier residents and workers to the Liverpool City Centre and increasing demand for a high-value retail offering.
- **Major proposed developments** could create new clusters and centres of activity in the City Centre, which create opportunities to activate surrounding streets and shift how people travel around and use the City Centre.
- The **universities** in Liverpool City Centre are expanding rapidly, bringing many students to the area.
- The **lack of dining and entertainment precincts in South-West Sydney** positions Liverpool to assume this role for the growing region.
- In the longer term, Liverpool could leverage economic development from the **Western Sydney Airport and Aerotropolis**, which could cause a step change in local development and retail prospects.
- Increased **tourist visitation** as a result of the Western Sydney International Airport opening will increase retail spending and hospitality demand.