

3 Consumer/Patron Profile

The proposed development will attract a range of visitors to Star City. The visitors can be separated into a number of distinct categories:

- Locals in the very narrow Pymont area, who will utilise the site as an extension of the existing local offer;
- Locals in the broader metropolitan area, who will use the site predominantly for the entertainment and F&B offer;
- Local Pymont workers, who will use this for daytime convenience; and
- Casino/Hotel goers, who will be attracted to Star City primarily for the Casino and secondly as a tourist/entertainment destination.

This section will assess the size of each of these distinct cohort groups, and provide a detailed profile, which will be used in following sections to understand demand and turnover potential for the proposed development.

3.1 Pymont Residents

The local catchment area has been defined as the local Pymont area within a reasonable walking distance to Star City (see Map 3.1). The majority of the residents are within 500 metres of the Star City complex, and would use the local retail offer and amenity for every day purposes as opposed to the vast majority of visitors to the area who would visit the Casino complex for entertainment purposes. As such, the purpose of defining a local catchment area is to understand the impact the new retail offer at Star City will have on the existing retailers in the local Pymont area as a result of local resident's spending being diverted to the new retail offer.

3.1.1 Historic and Forecast Population

The local Pymont area has undergone significant redevelopment over the last two decades. In 1991, only 1,700 people lived in the local area. The rejuvenation of the area coupled with increasingly dense living has seen the population grow to over 10,000 people in 2006.

In the short term, a major residential development is proposed at the former CSR site (Jackson's Landing), comprising two large residential towers (98 and 132 units respectively). Completion of this development is expected by the end of 2011. The population is forecast to increase by another 3,000 people over the next decade, with the local population reaching 13,500 by 2016.

Pymont Local Catchment Area, 1991-2016

Table 3.1

Year/Period ¹	Estimated Resident Population (No.) ¹		
	Local Catchment	Net Change Per Annum ²	% Change Trade Area ²
1991	1,700		
1996	3,900	440	18.1%
2001	8,300	880	16.3%
2006	10,440	430	4.7%
2011	12,500	410	3.7%
2016	13,500	200	1.6%

1. as at June

2. for each 5 year period

Source : ABS Cdata 1991, 1996, 2001 and 2006; ABS, *Regional Population Growth, Australia, Electronic Delivery (3218.0.55.001)*;

ie. Title, Author, Date, ABS publication number etc; Urbis

Map 3.1



Star City Trade Area urbis

3.1.2 Demographic Characteristics

The following points highlight the local resident's socio-economic characteristics. The full analytical profile can be found in Appendix 1.

- Average incomes are high, some 75% above the average per capita income in the Sydney Metropolitan area (Sydney).
- Household sizes are small at 2.02, compared to 2.7 for Sydney. This is not surprising given the inner city location, which appeals to the younger demographic, typically with no dependents. In fact, 65% of the residents are aged 14-39, compared to only 38% for Sydney.
- A high proportion of the households are classified as 'non-family' households (45% compared to 27% for Sydney). Of these, two-thirds are lone person households. The majority of the households classified as 'family households' are couples with no children (62% compared with 33% in Sydney).
- The majority (82%) of the residents are employed, primarily in white collar employment (88%). These people are also more likely to have a tertiary qualification (34%).

In summary, the area consists of young, professional, high income earners. There are few families in the area, with singles and couples the primary household type. The appeal for this area in the future is likely to remain the same, with people moving into the next stage of their lives (family/children) likely to move out, while the next generation of young professionals move in.

3.2 Broader Local Catchment

The broader local catchment has been defined based on local residents most likely to use Star City as a semi-regular entertainment and F&B offer (see Map 3.2). The size of this catchment and their profile is outlined below.

3.2.1 Historic and Forecast Population

The broader local area is relatively large, with nearly 150,000 residents in 2006. It has grown strongly compared to Sydney as a whole, at a rate of over 2.5% per annum since 1991. This growth is expected to moderate but still remain relatively strong, growing to over 175,000 people by 2016.

Broader Local Catchment Area, 1991-2016

Table 3.2

Year/Period ¹	Estimated Resident Population (No.) ¹		
	Local Catchment	Net Change Per Annum ²	% Change Trade Area ²
1991	102,100		
1996	115,000	2,580	2.4%
2001	132,000	3,400	2.8%
2006	149,580	3,520	2.5%
2011	163,920	2,870	1.8%
2016	175,520	2,320	1.4%

1. as at June

2. for each 5 year period

Source : ABS Cdata 1991, 1996, 2001 and 2006; ABS, Regional Population Growth, Australia, Electronic Delivery (3218.0.55.001);

ie. Title, Author, Date, ABS publication number etc; Urbis

3.2.2 Demographic Characteristics

The following points highlight the resident's socio-economic characteristics. The full analytical profile can be found in Appendix 1, (in the same table as that for the local Pymont resident above).

- Average incomes are high, some 46% above the average per capita income in Sydney.
- Household sizes are small at 2.1, compared to 2.7 for Sydney. Like Pymont, this is not surprising given the inner city location and its appeals to the younger demographic
- 55% of the residents are aged 14-39, compared to only 38% for Sydney.
- A high proportion of the households are classified as 'non-family' households (48% compared to 27% for Sydney). There are a higher proportion of lone person households than in Pymont.
- The majority (74%) of the residents are employed, primarily in white collar employment (87%). These people are also more likely to have a tertiary qualification (35%).

The profile of these residents is very similar to that of the Pymont residents. They are young, professionals and high income earners. The majority are either living as couples or on their own, but typically without children.