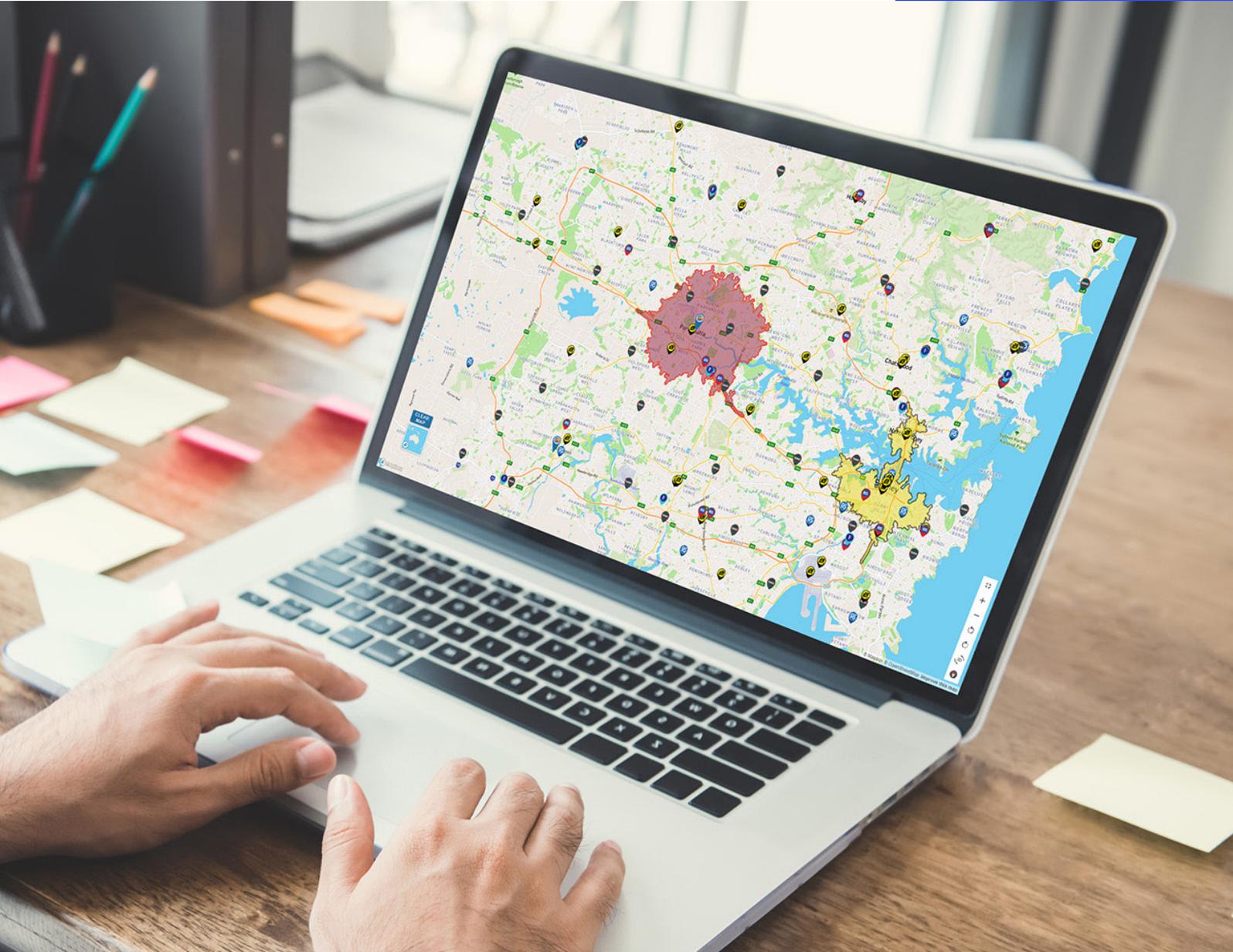




GapMaps

YOU'RE IN THE RIGHT PLACE



Choosing Optimal Locations For Large Format Retail

www.gapmaps.com

GapMaps has partnered with CommBank iQ to provide the most comprehensive range of location intelligence based insights available in Australia to support investment, leasing and location performance analytics for brands in the Large Format Retail (LFR) sector.

In one simple to use platform, GapMaps Live allows users to visualise their own network integrated with the latest socio-demographic, competitor, point of interest and consumer spend data so they can easily analyse and compare opportunities across the entire market and make faster, smarter and more confident location decisions.

Our team of Location Intelligence Experts have identified 500 LFR precincts in Australia across six major LFR sub-categories including Hardware, Furniture, Appliance and Electronics, Homewares, Motor Vehicle Accessories, Outdoor Adventure & Sport. Unique insights for each precinct are accessible in GapMaps Live which will help users understand:

- The mix of tenants (e.g. furniture vs hardware vs appliance/electronics)
- The population across the surrounding catchment
- Personal and household income levels
- The most up-to-date consumer spending data in Australia sourced from CommBank iQ, including total spending by category, per capita spending by category and the online share by category

Our Premium GapMaps Live bundle includes:



Platform access for up to 20 users



Map your own business locations



The latest census demographics data to better understand populations in your catchments



Advanced demographics insights including population forecasts



Visibility of business locations across LFR and all Point of Interest Categories



Visitation Data to understand customer visitation patterns across your network



Access and update store data from the field in real-time with GapMaps Connect



LFR Retail Precinct Insights & Reports



LFR Resident Spend Insights



Understand traffic movement patterns across your network



Expert guided setup and support

LFR Retail Precincts Insights and Reports

GapMaps has identified 500 LFR precincts across Australia, ranging from major bulky goods centres to small, strip-based offers which can be easily visualised in GapMaps Live using the LFR Precincts Premium Layer so users can identify precincts that have the highest and lowest penetration of major LFR stores.

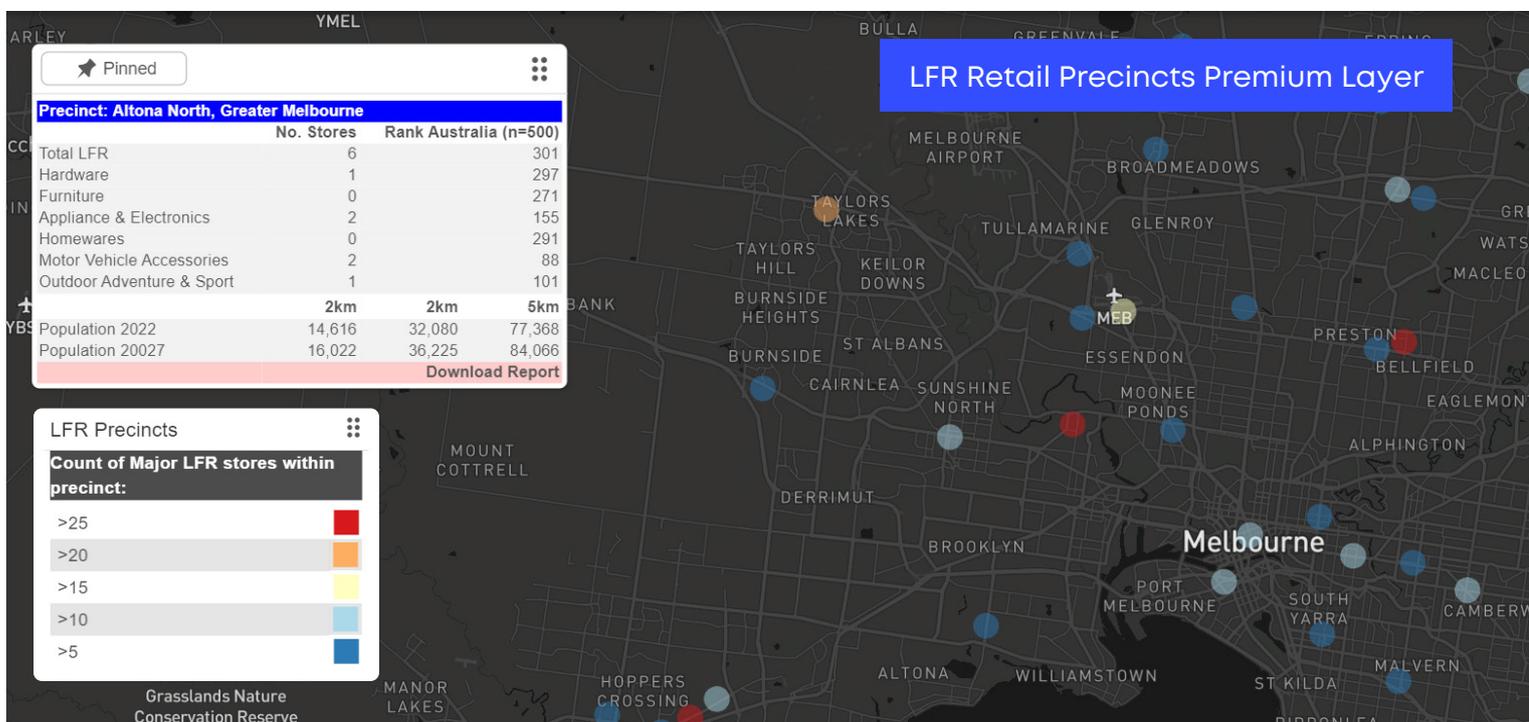
Downloadable reports help users to understand the competitor intensity of each LFR precinct and surrounding precincts along with the demographic characteristics of the surrounding catchment to identify key locations that are lacking representation and help inform their market planning strategies.

The reports include the following key metrics:

- Total number of stores by sub-category (Hardware, Furniture, Appliance and Electronics, Homewares, Motor Vehicle Accessories, Outdoor Adventure & Sport) ranked within the respective metro/non-metro area and nationally.
- Customer Draw and Precinct Activity – using the latest mobile device visitation data we are able to identify popular times of day / days of week a precinct is used, how far customers travel to visit the precinct and distributions of visitation from various drive-time catchments (e.g. 25% from 3km, 50% from 5km).
- Population – Current and future estimates of population within a set of radius and drive time catchments.
- Demographics – Personal and average household income levels within a set of radius and drive time catchments, as sourced from the 2021 ABS Census.
- Consumer Spending – Sourced from CommBank iQ, these datasets represent the most contemporary and accurate view on consumer spending at a small area level in Australia. The precinct report identifies spend per capita on LFR categories compared with the respective benchmarks, as well as the total volume of retail spending available by LFR category within the defined catchment and the share of each category that is transacted via online. Spending datasets are current for the year ending June 30 2023.

These reports can be used by:

- LFR brands when evaluating a location to understand its composition and mix, key brands that are present, activity profile, catchment size, key demographics and available spending by category.
- LFR Landlords, investors, centre managers, developers, agents (leasing and buyer), researchers and consultants to understand their centre strengths and weaknesses, positioning and competitive advantage relative to other centres and precincts.



LFR Retail Precincts Sample Report



2023 LFR Precinct Summary

Caringbah, Greater Sydney

Key Insights:

- The precinct ranks number 2 in Australia (2 in Greater Sydney) for total LFR stores.
- Relative to the Greater Sydney average, the tenant mix is weighted more to the categories: Hardware, Furniture, Outdoor Adventure & Sport.
- 36% of visits to the precincts are by residents who live within 3km, relative to a average of 29%.

Stores*

	Brand Count			Rank	
	Precinct	Australia	Greater Sydney Average Precinct	Australia	Greater Sydney
Total LFR	38	106	10.9	2	2
Hardware	7	30	2.0	6	1
Furniture	15	30	3.5	3	3
Appliance & Electronics	6	13	2.3	4	2
Homewares	5	13	1.5	10	4
Motor Vehicle Accessories	2	9	1.1	81	10
Outdoor Adventure & Sport	3	11	0.6	6	1

* out of 106 brands tracked by GapMaps.

Usage**

	Morning	Afternoon	Night	Late Night	Weekend
Time of Day					
Precinct	35%	45%	11%	6%	73%
Greater Sydney Average Precinct	30%	42%	15%	10%	71%
Distance from Home					
Precinct		2km	3km	5km	10km
Greater Sydney Average Precinct		20%	29%	45%	66%

** share of visits to the precinct assessed by the time of day and day of week that the visit occurred. Based on mobile device analytics for the 12 months to June 2023.

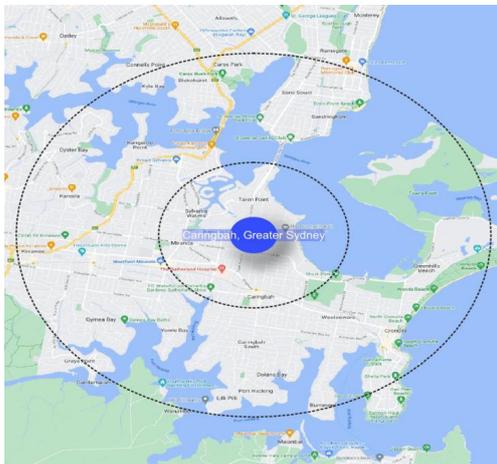
Catchment Population

	2km	3km	5km	Greater Sydney
Population 2022	28,700	59,600	148,700	
Population 2027	29,800	61,600	153,400	
Population Growth 2022-2027 (% p.a.)	0.8%	0.7%	0.6%	1.0%
Avg. HH Income	61,600	63,100	66,700	60,500
Avg. Personal Income	110,100	116,700	124,700	119,700

Catchment Spending*** (3km)

	Total (AUD Mil.)	%Online	Per Capita (AUD)	Per Capita Variation**
Total LFR	184.5	24%	3,127	+19%
Hardware	46.0	8%	779	+23%
Furniture	28.1	29%	477	+27%
Appliance & Electronics	50.6	42%	857	+12%
Homewares	17.3	28%	294	+24%
Motor Vehicle Accessories	24.2	9%	410	+8%
Outdoor Adventure & Sport	18.3	20%	311	+30%

*** Based on CommBank iQ spending estimates, see disclaimer on following page.
* from Greater Sydney average



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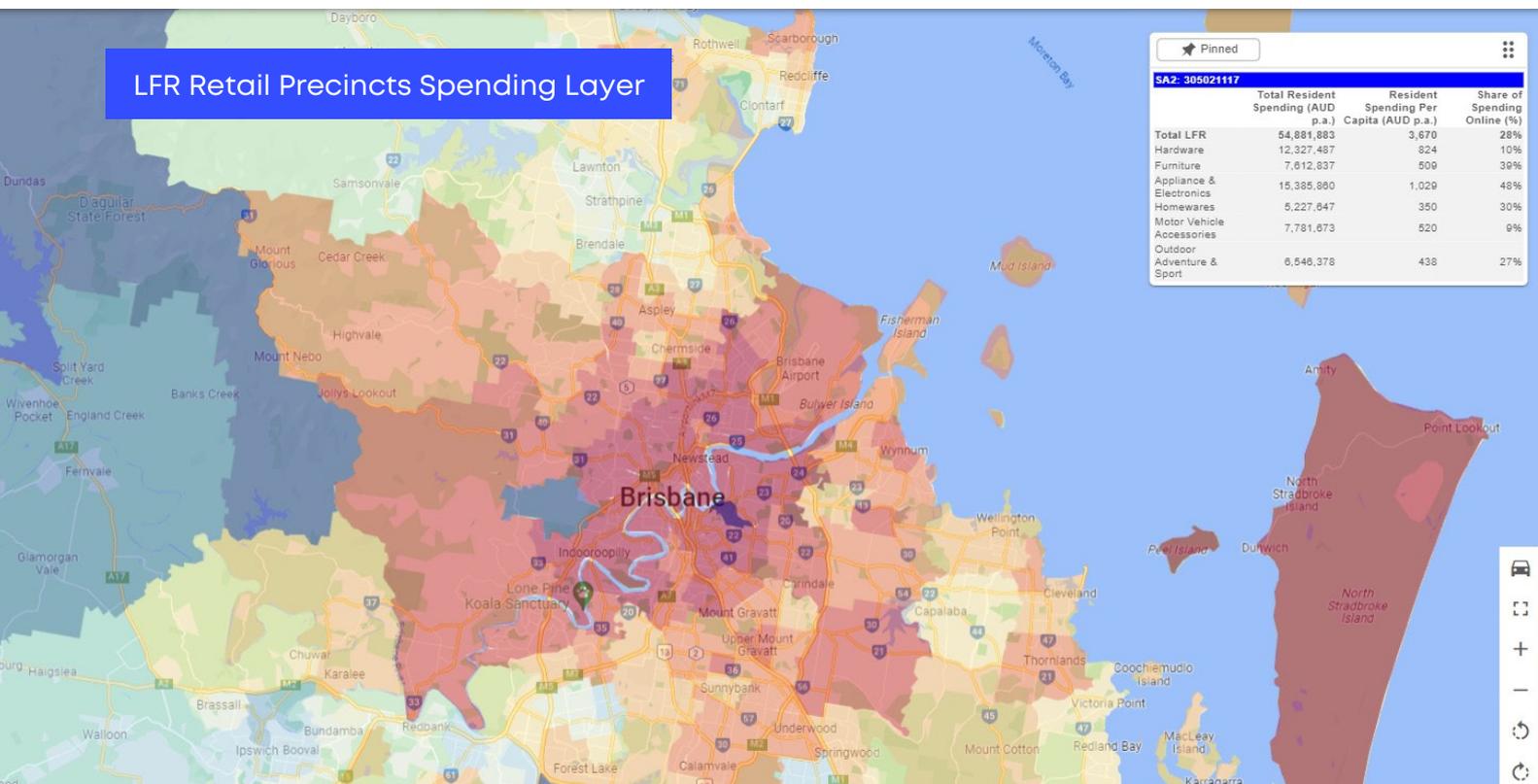
LFR Retail Spend Insights

GapMaps has partnered with CommBank iQ to introduce LFR Retail Spend Insights in GapMaps Live which provides the most accurate view on consumer spending data on LFR goods at a local level so users can optimise network strategy decisions.

These insights will enable you to quantify the size of the potential target market across any catchment across Australia by identifying which parts of the country spend more on LFR goods (including online spend) in all major categories including:

- Hardware
- Furniture
- Appliance & Electronics
- Homewares
- Motor Vehicle Accessories
- Outdoor Adventure & Sport

The insights can be extracted as a radius, a drive time or any defined trade area. All data is up to date and easily accessible.



About CommBank IQ

CommBank iQ is a joint venture between the Commonwealth Bank and Quantium, established to unlock the power of Australia's largest aggregated and de-identified transaction banking dataset through leading analytics and artificial intelligence. This unique partnership enables businesses and institutions to analyse trends, overcome challenges, and create better, more targeted products and services for Australians.

www.gapmaps.com

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