

RETAIL INVESTMENT



**JETTYRD
GLENELG**

JETTYROADGLENELG.COM.AU

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WELCOME

JETTY ROAD, GLENELG. ADELAIDE’S PREMIER SEASIDE SHOPPING AND DINING DESTINATION.

There’s never been a better time to invest in this iconic South Australian retail strip, with millions of dollars of new infrastructure investment in the pipeline, a booming local tourism and events scene and a new look marketing campaign underway to capture a greater share of South Australia’s retail and leisure market.

Jetty Road is a key regional shopping destination for the City of Holdfast Bay’s 37,000 residents and a tourism drawcard, attracting over 1.4 million domestic and international visitors each year.

The vibrant Jetty Road precinct comprises 330 businesses, including three large supermarkets, a cinema, major hotels and 100+ cafes, restaurants and bars, attracting people of all ages and backgrounds.

A dynamic arts and events scene activates Jetty Road throughout the year, with an exciting new marketing campaign highlighting the precinct’s unique combination of attractions, eateries and shops.

1. Australian Bureau of Statistics, Regional Population Growth, Australia, 2017-18
2. Tourism Research Australia NVS and IVS 2016
3. Jetty Road Retail Strategy 2018-2022

FAST FACTS

BOOMING TOURISM DESTINATION

- 1.4 Million+ visitors to Glenelg each year
 - 16,000 international overnight visitors
 - 156,000 domestic overnight visitors
 - 1.4 million day trippers
- 80% of visitors to Adelaide spend time in Glenelg
- 32% growth in tourism expenditure (2014-2018)
- 30 diverse accommodation offerings

AFFLUENT LOCAL COMMUNITY

- 37,000 residents⁵
- 60% of residents shop in Jetty Road, Glenelg at least once a week⁶
- Above average income and education⁷ – seeking high quality retail and leisure experiences⁸

4. Tourism Research Australia NVS and IVS 2016-2018
5. Australian Bureau of Statistics, Regional Population Growth, Australia, 2017-18
6. Intuito Market Research 2016
7. Australian Bureau of Statistics 2016 Census of Population and Housing
8. Intuito Market Research 2016
9. Social media account figures correct as at January 2021



STRONG DIGITAL PRESENCE @JETTYRDGLENELG⁹

f 29,590

@ 18,660

POSITIVE BUSINESS TRENDS

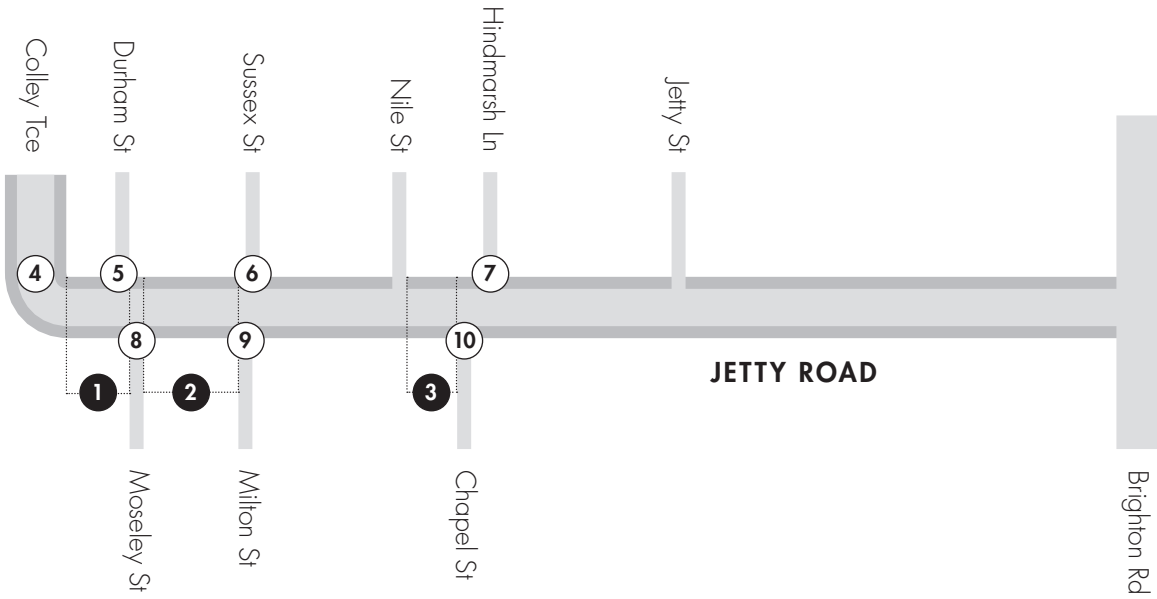
- \$133.93 average transaction value¹⁰
- Average spend up by 5%¹¹
- Jetty Rd, Glenelg has the lowest vacancy rate compared to similar precincts in South Australia¹²

ACCESS

- 43,000 two-way traffic during a 24 hour period at the Jetty Road, Glenelg and Brighton Road intersection¹³
- Adelaide’s tramline runs from the CBD to the heart of Glenelg, delivering approx 1,300 boardings along Jetty Road Monday - Friday and approx 1,600 on Saturday¹⁴
- Tram service every 15 minutes
- Proximity to Adelaide Airport

INFRAPLAN¹⁶

Pedestrian Counts of 13 Hours Duration			Fri 14 Sep 2018	Sun 30 Sep 2018	Sun 13 Jan 2019
Footpaths Both Sides	1	Moseley/Durham to Colley Tce	10,014	16,181	19,440
	2	Milton/Sussex to Moseley/Durham	11,839	20,396	21,366
	3	Chapel to Nile	8,009	11,600	14,373
Road Crossings	4	Crossing Colley Terrace	6,479	13,620	15,340
	5	Crossing Durham Street	5,600	9,871	10,753
	6	Crossing Sussex Street	6,135	11,161	10,014
	7	Hindmarsh Lane	877	1,909	866
	8	Crossing Moseley Street	3,509	6,479	8,353
	9	Crossing Milton Street	5,131	8,766	8,032
	10	Crossing Chapel Street	3,299	6,355	6,702



10. Spendmapp – all hours June 2019
11. Premier Retail Marketing 2017
12. JLL 3Q20 High Street Retail Report
13. Department for Planning Transport and Infrastructure Traffic Estimates 1 March 2015
14. Department for Planning Transport and Infrastructure Survey 2013
15. Jetty Road Retail Strategy 2018-2022
16. Austraffic data survey 2018-2019

Artist impression: Eastern Gateway, Jetty Road Masterplan



PRECINCT TRANSFORMATION



Artist impression: Chapel Street Plaza, Jetty Road Masterplan

The Jetty Road, Glenelg Masterplan was commissioned in 2017 to establish a planning and design framework to guide future works over the next decade, while maintaining the historical and distinctive character of the street. The Masterplan will guide multi-million dollar improvements driven by:

- Participation by the private sector, including developers who are willing to work with council to coordinate their proposals with public realm improvements.
- Responding to the community's desire for a safe and inclusive public realm, including wider footpaths, improved paving, lighting and street furniture.
- The need to accommodate climate change including planning for tree succession, increased shade and introduction of water sensitive urban design.

KEY ASPECTS OF THE MASTERPLAN INCLUDE:

- Identification of 3 zones
 - Zone 1 – Coast: hospitality and entertainment
 - Zone 2 – Central: fashion, gifts and homewares
 - Zone 3 – Gateway: fresh food and services
- Improved pedestrian connectivity and integration with Moseley Square and Colley Terrace
- Redefining the visual identity of the eastern gateway
- Improved safety for cyclists and better connections to the Mike Turtur Bikeway
- Wider footpaths
- Improved paving
- Improved lighting
- Bespoke street furniture
- Clearer wayfinding through improved signage
- Consolidation of on-street parking to allow for more trees and outdoor dining where appropriate
- Safer pedestrian crossings



NEW DEVELOPMENTS

APPROVED & UNDER CONSTRUCTION

A range of premium residential projects have been approved for construction which will increase the resident population using the precinct including:

1. Ei8ht South Esplanade. Completed October 2020
2. Mixed use & 6-star hotel development on Colley Tce
3. Eastern gateway of Jetty Road
4. A 12-story, 6-star waterfront hotel and apartment development on Adelphi Terrace
5. Karidis Apartments on Durham Street
6. Apartment complex corner Jetty Road & Partridge Street

CONCEPT PLANS

1. Concept plans for 6-story premium offices between Byron and Jetty Streets featuring shops and ground level car parking that will bring up to 200 additional workers, plus their clients and visitors to the precinct, helping to support the local day time economy.

THE GLENELG JETTY REJUVENATION PROJECT

The Glenelg Rejuvenation Project centres on the development of an iconic tourist destination in the form of a re-developed and re-purposed jetty. The concept includes; Glenelg Jetty redevelopment with public sea baths and commercial opportunities for the private sector, integration with the Jetty Road Mainstreet and Moseley Square (Jetty Road Masterplan) and Glenelg Town Hall Redevelopment.

Council is committed to building a stronger region and will continue meeting with key players to secure commitment for the concept.¹⁷

17. Media Advice, City of Holdfast Bay 2016



Commissioned by the Jetty Road Mainstreet Committee, the Jetty Road Retail Strategy 2018-2022 guides the future direction and identifies the actions required to maintain a prosperous retail sector. The strategy is focused on achieving \$297 million in retail, hospitality and allied industry expenditure by 2022. It seeks to leverage the opportunities created through the masterplan and new development investment, bringing placemaking and place-management together to create a unique offering in a high-quality environment.

The retail strategy identifies four key priority areas:

1. Promote shopping and dining as the key reasons to visit
2. Develop and enhance the appeal of the retail experience
3. Grow the capabilities of the retail sector
4. Work better together

18. McGregor Tan quantitative consumer research study 2016

Research to determine the demand for tourism experiences by the intrastate market identified tactical messaging and product development opportunities.¹⁸

Day trippers and tourists are seeking:

- Weekend outdoor markets
- Fresh food markets
- Boutique or unique shops and providores

Residents are seeking:

- Upmarket restaurants
- Fresh seafood and local produce
- Better quality products
- Regional specialty product stores
- Menswear
- Modern/trendy/upmarket bars

SHOPPER SEGMENTS¹⁹

Primary
Catchment Zone

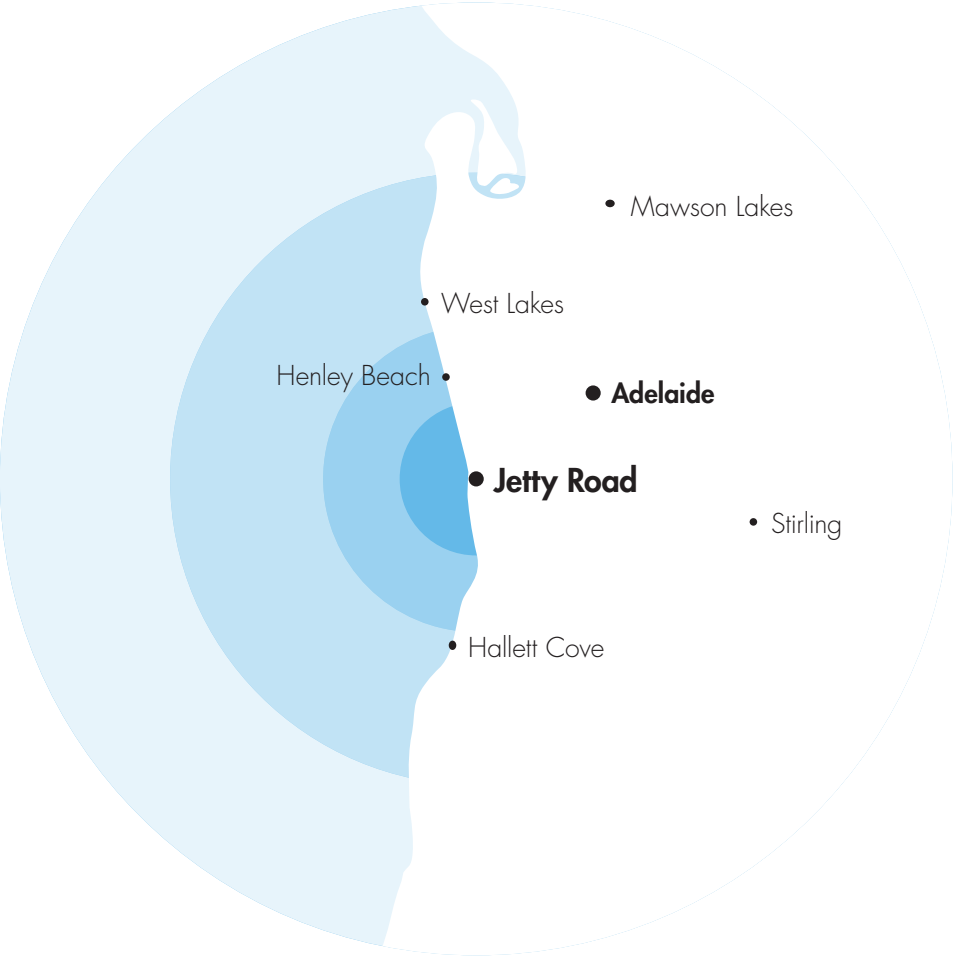
Residents living within 5km radius
Local staff/workers
Convenience shoppers
Food shoppers
Use retail and professional services
Short term parking (<1hr) needed
Convenient access is important

Secondary
Catchment Zone

Residents living within 10km radius
Comparison shoppers
Fashion/accessory shopper
Homewares shoppers
–
Medium term parking (2-3hr) needed
–

Tertiary
Catchment Zone

Residents from outer metropolitan Adelaide
Day trippers (regional/state)
Overnight tourists
Experience shoppers
–
Public transport access is important
–



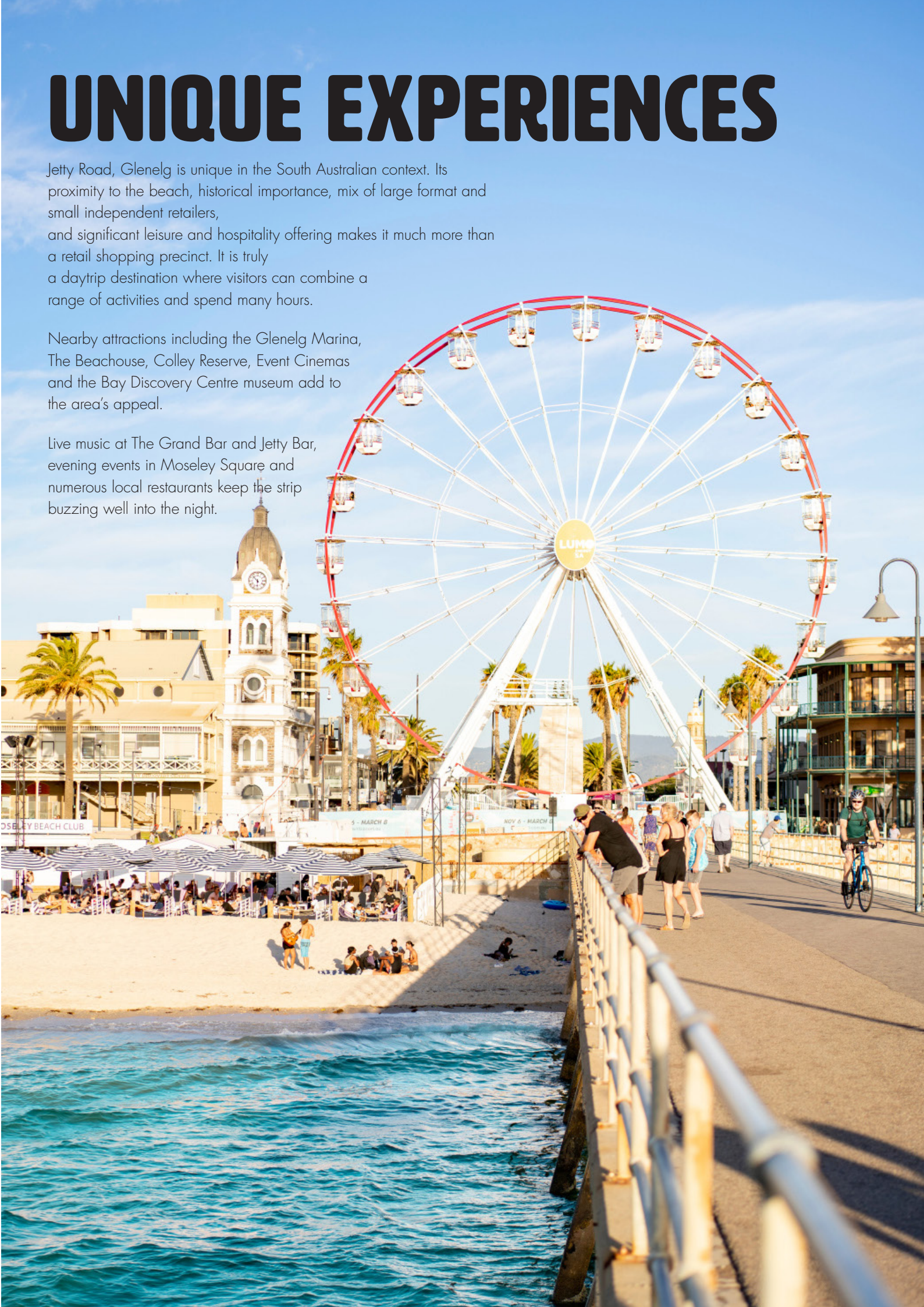
19. Jetty Road Glenelg, Retail Strategy 2018-2022

UNIQUE EXPERIENCES

Jetty Road, Glenelg is unique in the South Australian context. Its proximity to the beach, historical importance, mix of large format and small independent retailers, and significant leisure and hospitality offering makes it much more than a retail shopping precinct. It is truly a daytrip destination where visitors can combine a range of activities and spend many hours.

Nearby attractions including the Glenelg Marina, The Beachouse, Colley Reserve, Event Cinemas and the Bay Discovery Centre museum add to the area's appeal.

Live music at The Grand Bar and Jetty Bar, evening events in Moseley Square and numerous local restaurants keep the strip buzzing well into the night.



MARKETING CAMPAIGN

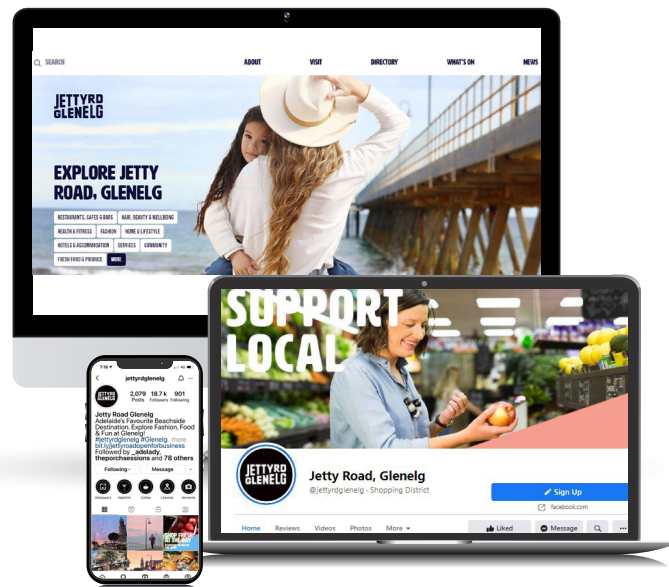
Jetty Road's eye-catching 'I Want to Stay' destination marketing campaign aims to leverage the precinct's unique selling points, highlighting key features including the beach, the jetty, water activities, nature, cycling, shopping and dining.

Targeting females aged 25–44, families, in-destination leisure visitors, visiting friends and relatives, residents and local Adelaide day trippers, the campaign maintains awareness of the Jetty Road brand and leverages the SA Tourism Commission's campaign to increase visitation and expenditure in Glenelg.

Campaign delivery highlights have included:

- A high impact full tram wrap
- Jetty Road LOCAL Magazine
- Partnerships with lifestyle TV programs
- Digital marketing and blogs placed via website www.jettyroadglenelg.com
- Social media
- Event promotions
- Promotion via various council owned infrastructure

The campaign is one of several initiatives funded through the Jetty Road Mainstreet Levy, valued at \$598,480 in 2021/22. Levy funds are invested into marketing, events and activities designed to drive demand and support business development.



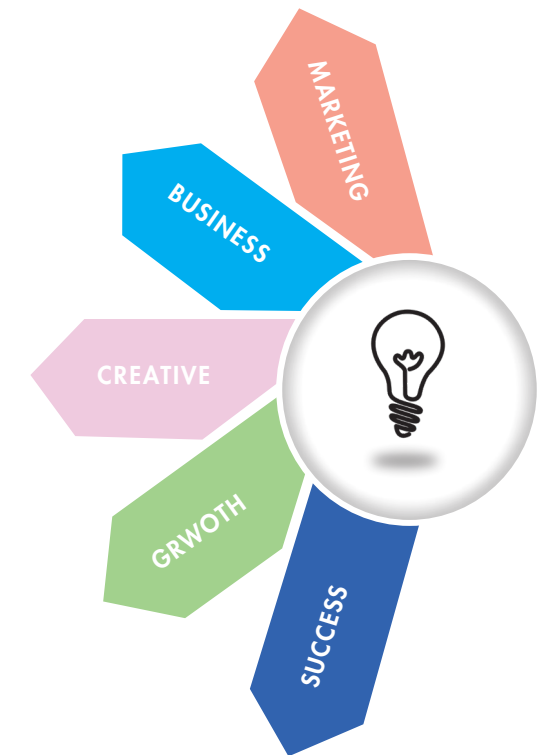
INVESTMENT SUPPORT

The Jetty Road Mainstreet Committee (JRMCM) aims to attract new retailers and support existing retailers within the Jetty Road precinct. The JRMCM works with local, national and international operators during the conceptualisation, planning and implementation process of new investments.

Free support and advice including, but not limited to:

- Tourism market data and research
- Project feasibility data
- Industry contacts
- Local, State and Federal Government
- Targeted identification of potential investors and operators for new retail or hospitality assets
- Support to start-up businesses and products
- Shopfront Grant Program
- Small Business Grant Program

In addition to the support from the JRMCM, two full time employees* (coordinator & assistant) are employed to assist businesses within the precinct. The appointed individuals assist with business development, marketing strategies, events, dealing with council and overall support and assistance to traders.



EVENTS

Events are an integral part of life in the City of Holdfast Bay and an important element of the Jetty Road, Glenelg marketing program, helping to position it as a vibrant destination and providing it with a competitive edge.

City of Holdfast Bay Events Fast Facts:

- 200+ events and festivals
- 500k event-specific visitors
- \$16m media coverage
- 53.9m audience reach²⁰

A key feature of the City's Tourism Plan is the annual events program. Due to COVID-19 requirements for major events, the program has been modified for 2021/22 in order to hold a wide range of COVID-safe events.

- Christmas at the Bay
- Street parties*
- Sunset markets
- Beach concerts*
- Alpine Winter Festival

Jetty Road, Glenelg is both a gateway and hub for many of the City's events representing a significant opportunity for local businesses.

*Event schedule is subject to change and will be responsive to current COVID-19 restrictions.

20. City of Holdfast Bay Tourism Plan 2020



CONTACT US

With so much happening, there's never been a better time to invest. Talk to us today about being part of the next exciting phase of Jetty Road, Glenelg.



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Web: jettyroadglenelg.com

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Notes for Reader: Publication date July 2021. All statistics reported in this document are calculated using the latest available data.

JETTYRD GLENELG

PRODUCED BY THE JETTY ROAD MAINSTREET COMMITTEE