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RESEARCH STRATEGIES RESULTS

Mortlake Development Research 2012

March 2012

Summary



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Objectives and Methodology

- **This research study will help Aust Equity to better understand the perception and views of local residents on the proposed Mortlake development.**
 - Identify awareness on the proposed development.
 - Determine the level of support.
 - Test the credibility and effectiveness of positive and negative messages regarding the proposed development.
 - Compare significant differences by suburbs.
 - Regression analyses used to determine the influence of positive and negative messaging on considered support.

- **Computer Assisted Telephone Interviews (CATI) survey.**
 - Conducted between 16th – 18th March 2012.
 - Random sample of n=300 within the Canada Bay City Council (Mortlake, Breakfast Point, Cabarita and Concord).
 - +/-5.6% maximum margin of error (at the 95% confidence level)
 - Otherwise representative of age, sex and (suburb) area.
 - Independent researchers

- **Results analysed and reported by independent, qualified researchers, members of the Australian Market and Social Research Society (AMSRS).**

Summary



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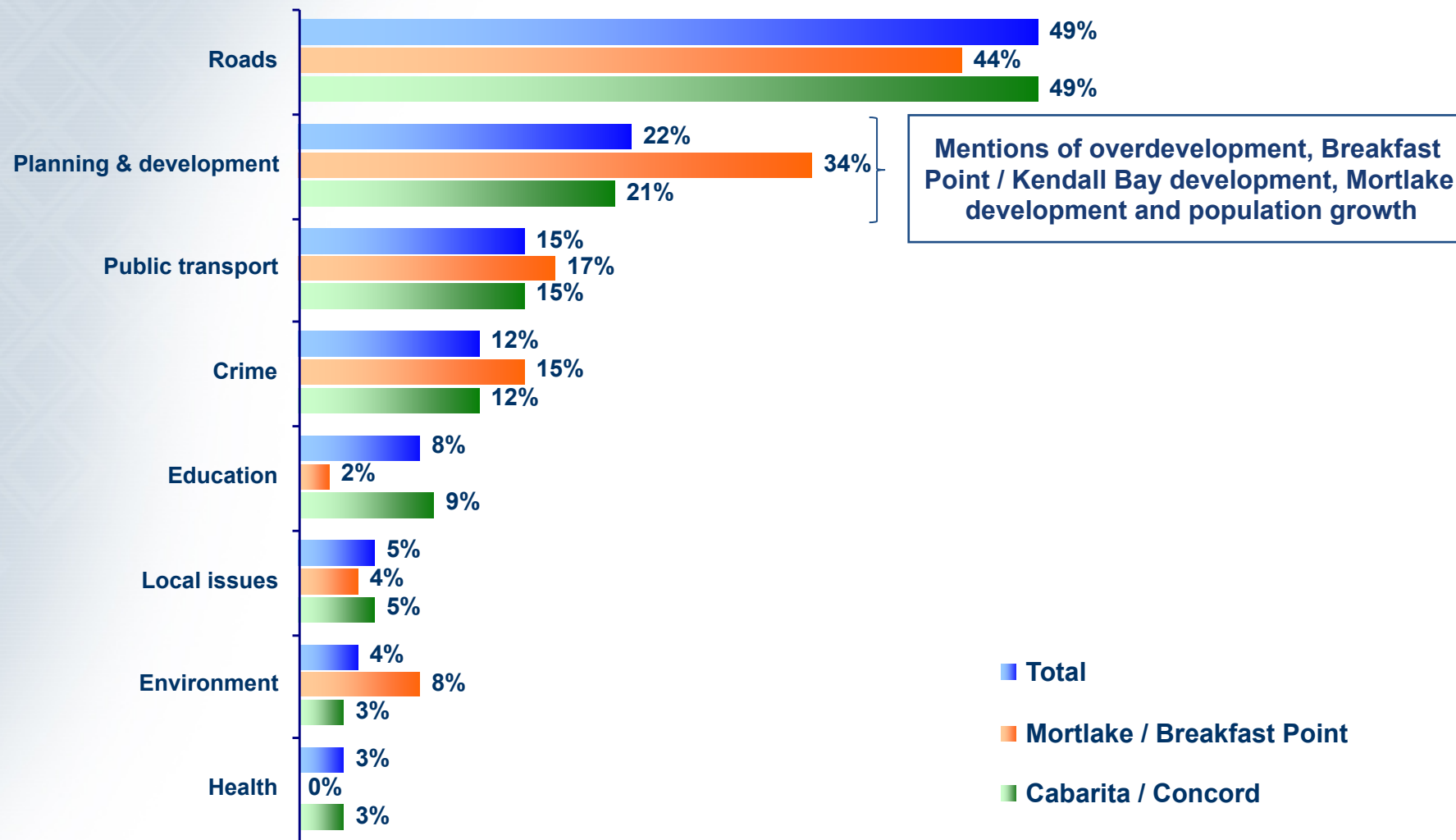
Results and Findings

- Roads is the main spontaneous issue of concern in the local area by nearly half of residents. This is particularly relevant to traffic congestion and parking. With regard to traffic congestion, a high number of residents believe congestion in the area is a result of overdevelopment, traffic passing through the area and a lack of action from both State and local government authorities.
- In relation to traffic congestion, a significant number of residents believe improvements to public transport is a high priority followed by intersections on Parramatta Road and Concord Road. Improvements to the local ferry service rates highly with residents of Mortlake and Breakfast Point.
- There is a particularly high awareness of the proposed development in the Mortlake and Breakfast Point areas. This awareness has been driven by a combination of newspaper articles and letterbox drops.
- Given the particularly high awareness of the proposed development, initial support for the project (before exposure to positive and negative messaging) is relatively strong at over one-third of local residents.
- The most credible positive messaging is related to providing areas of open space and public access to foreshore.
- Roads, public transport and parks are the main priority areas nominated by residents for additional investment in their local community.
- Exposure to messaging (positive and negative) and potential investment in the community was found effective at converting those currently undecided on the proposed development to a position of support. Total support increased by a healthy 7 points.



Local area & Issues of concern

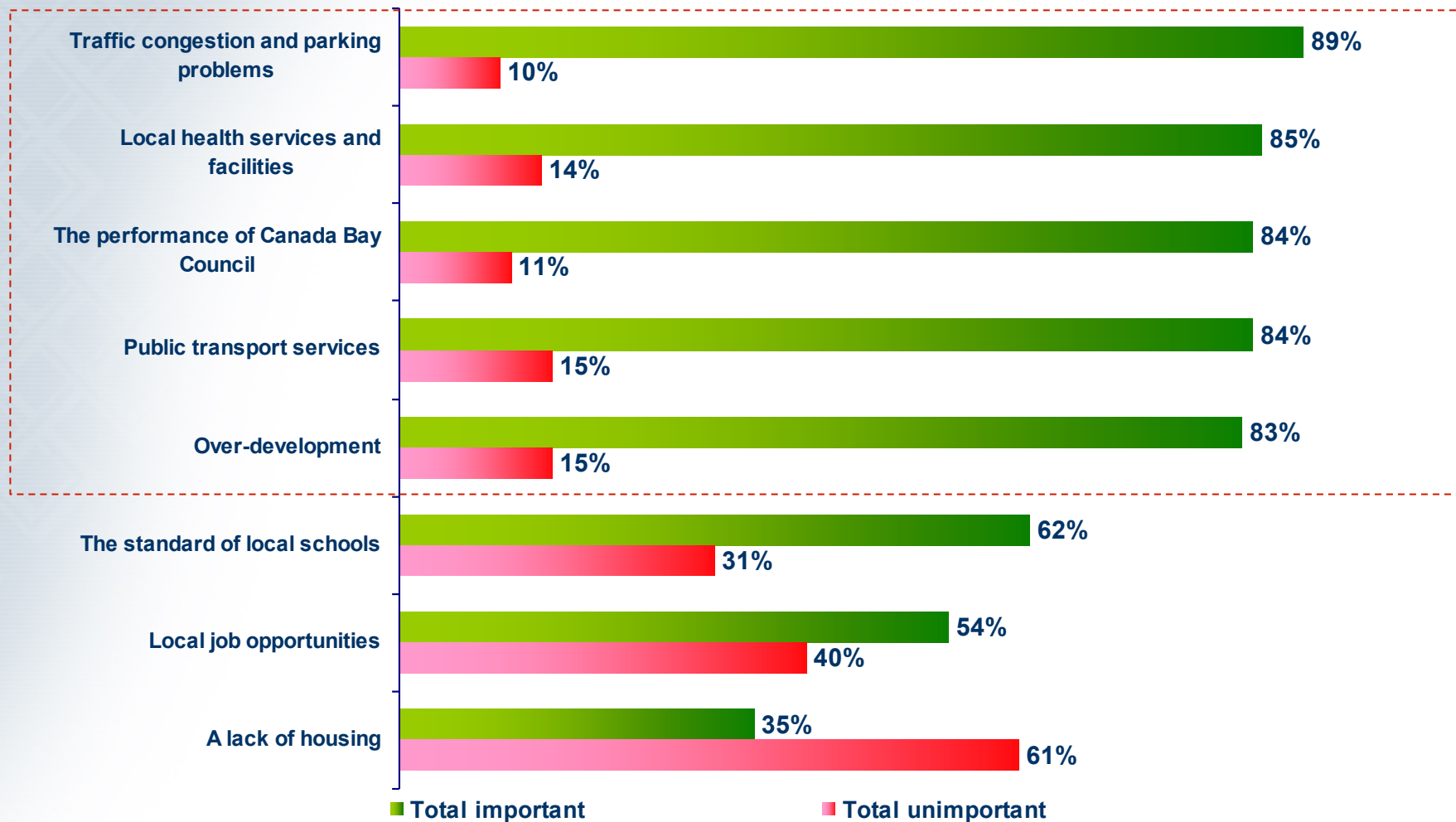
Roads is the main spontaneous issue of concern in the local area by nearly half of residents. Planning and development is the second most important issue, especially to residents in Mortlake and Breakfast Point.



Traffic congestion, local health services, the Canada Bay Council performance, public transport and over-development are all important prompted issues in the local area.



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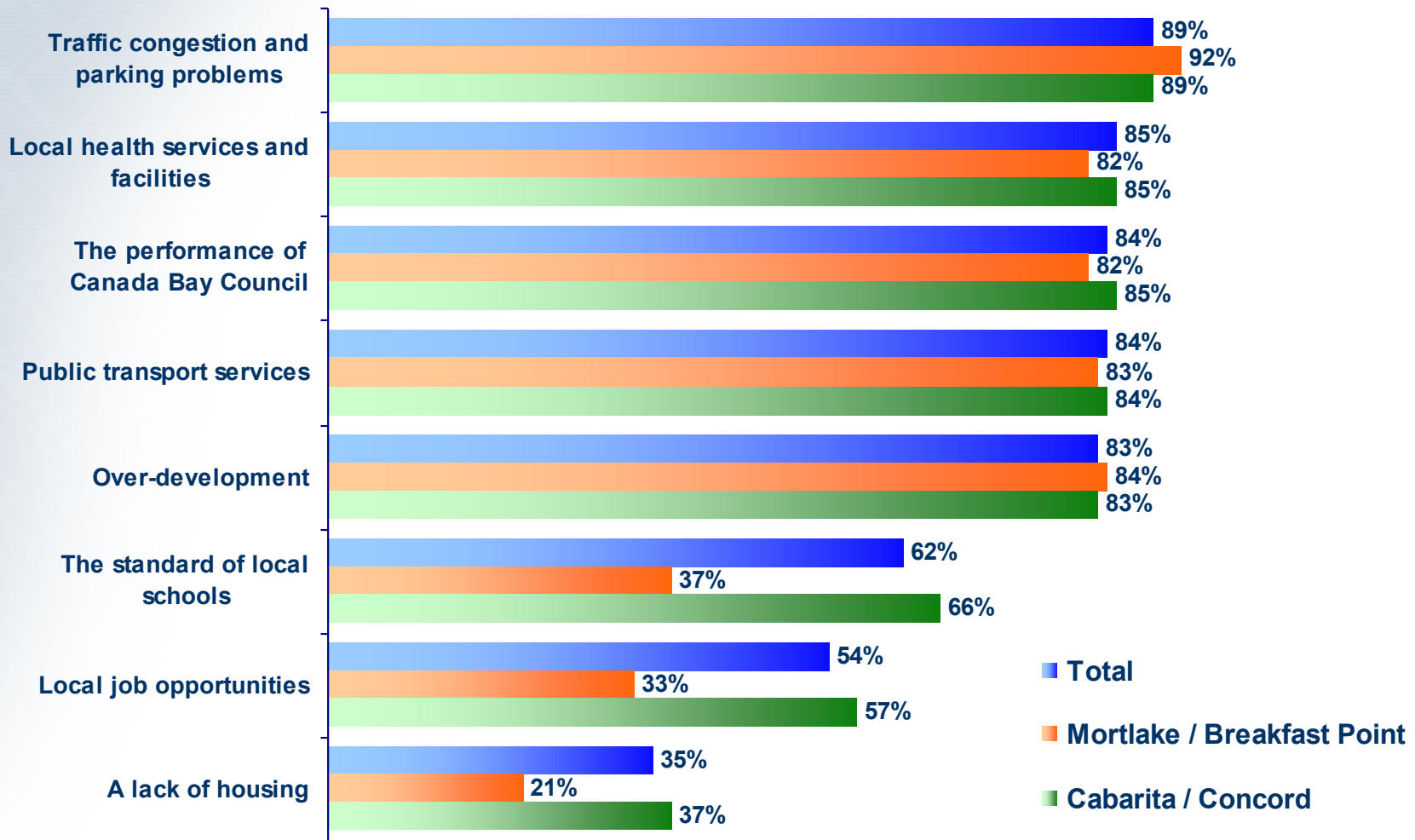


*Total important= % Very important + % Fairly important Total unimportant = % Not at all important + % Not very important

Q4) I am now going to read you a list of issues that other people have said are important in your local area currently. For each please tell me how important it is to you personally; very important, fairly important, not very important or not important at all.



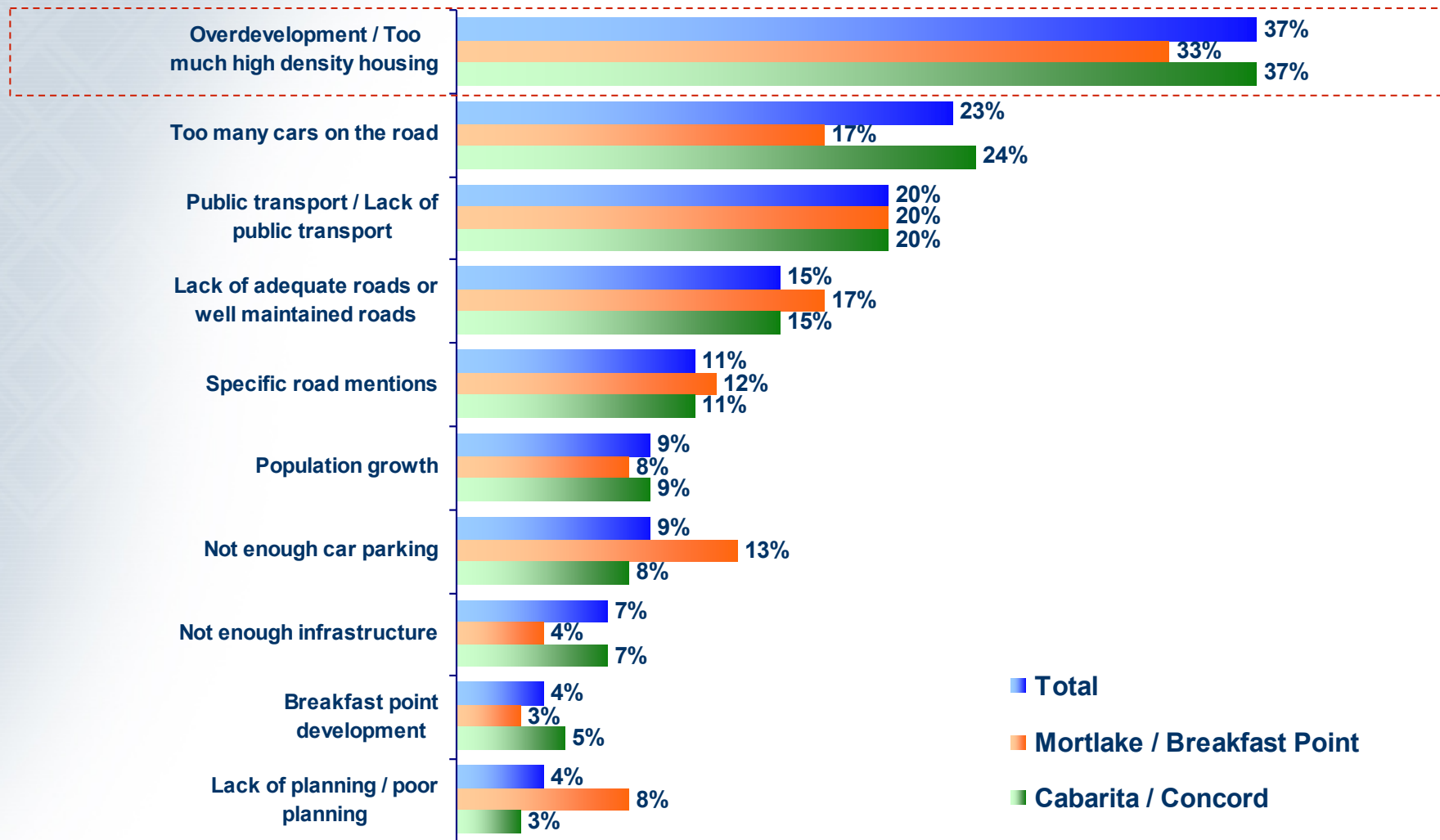
Those top 5 prompted issues are consistent across all areas surveyed. However, standard of local schools, local jobs opportunities and lack of housing are issues less predominant amongst Mortlake and Breakfast Point residents.



*Total important= % Very important + % Fairly important

Q4) I am now going to read you a list of issues that other people have said are important in your local area currently. For each please tell me how important it is to you personally; very important, fairly important, not very important or not important at all.

Over development was mentioned as the main cause of traffic issues in the area.



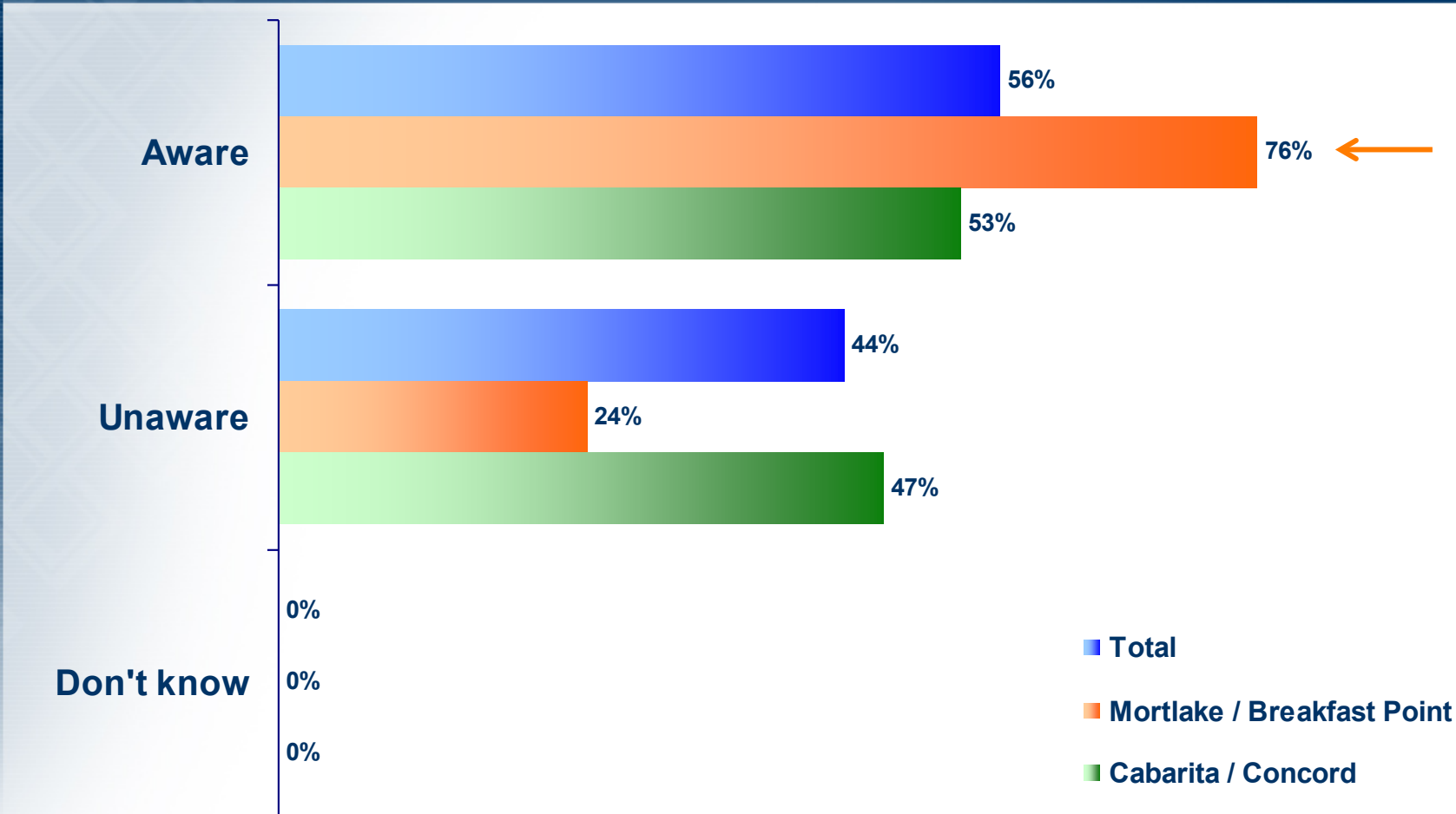
Q5) Thinking specifically about traffic and transport issues in your local area now, what would you say is the cause of these problems?



Awareness of the Development



More than half of total local residents have heard or seen something about the proposed development, and this awareness is even higher in areas surrounding the development (Mortlake and Breakfast Point).



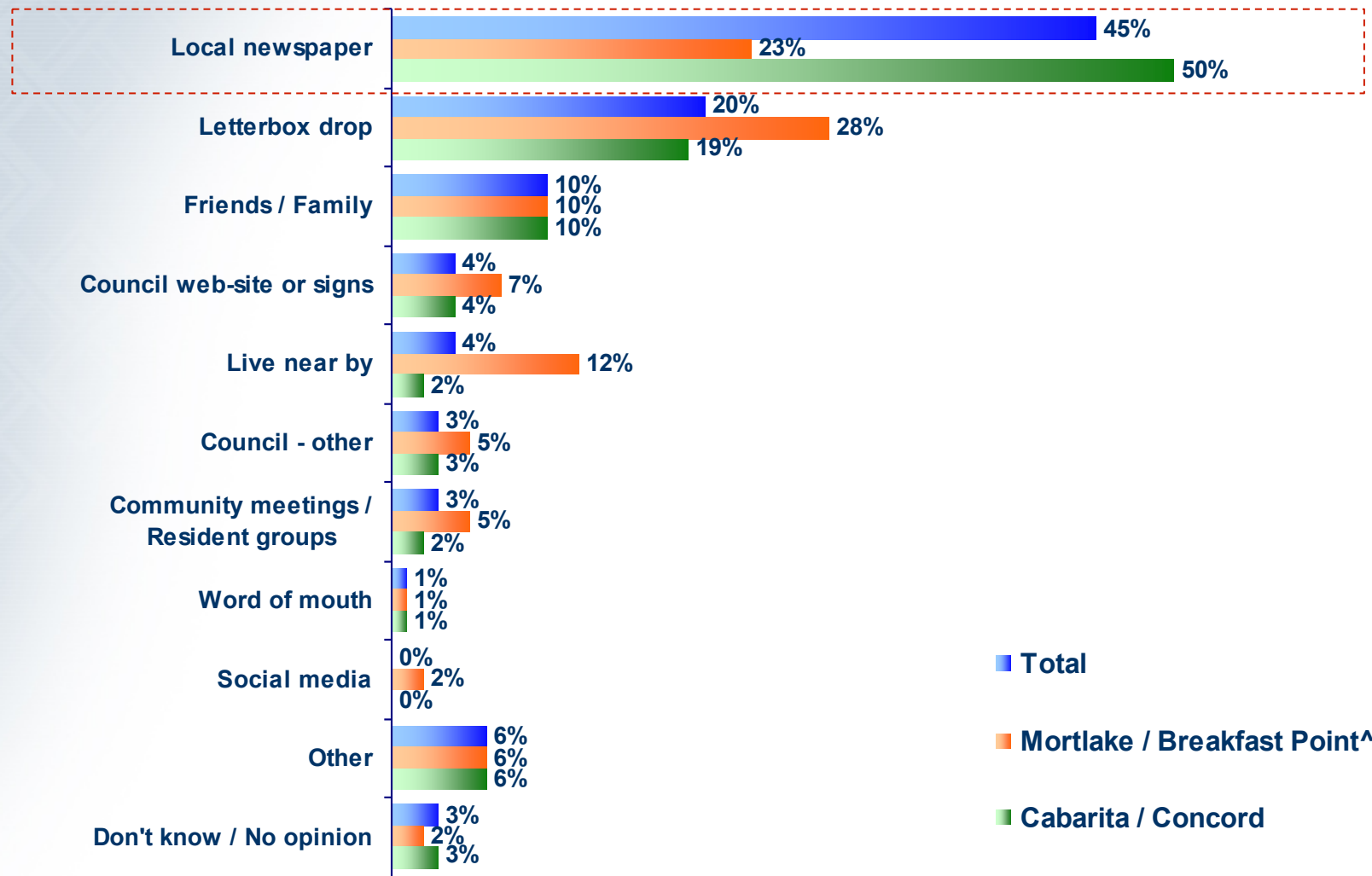
*Aware = % Definitely yes + % Probably yes

Unaware = % Definitely no + % Probably no + % Undecided

Q6) Thinking about development, the Canada Bay local government area has been experiencing redevelopment of older industrial sites for residential development in a number of areas. One such area is Mortlake. There has been some comment in the media recently about a new development to be built in the old industrial area of Hilly Street, towards the northern end of the Mortlake. This development project is proposing to build residential apartments with associated car parking and open space. Before today, were you aware of this development?



Amongst those residents aware of the proposed development, the local newspaper is the main source of information, followed by letterbox drop.



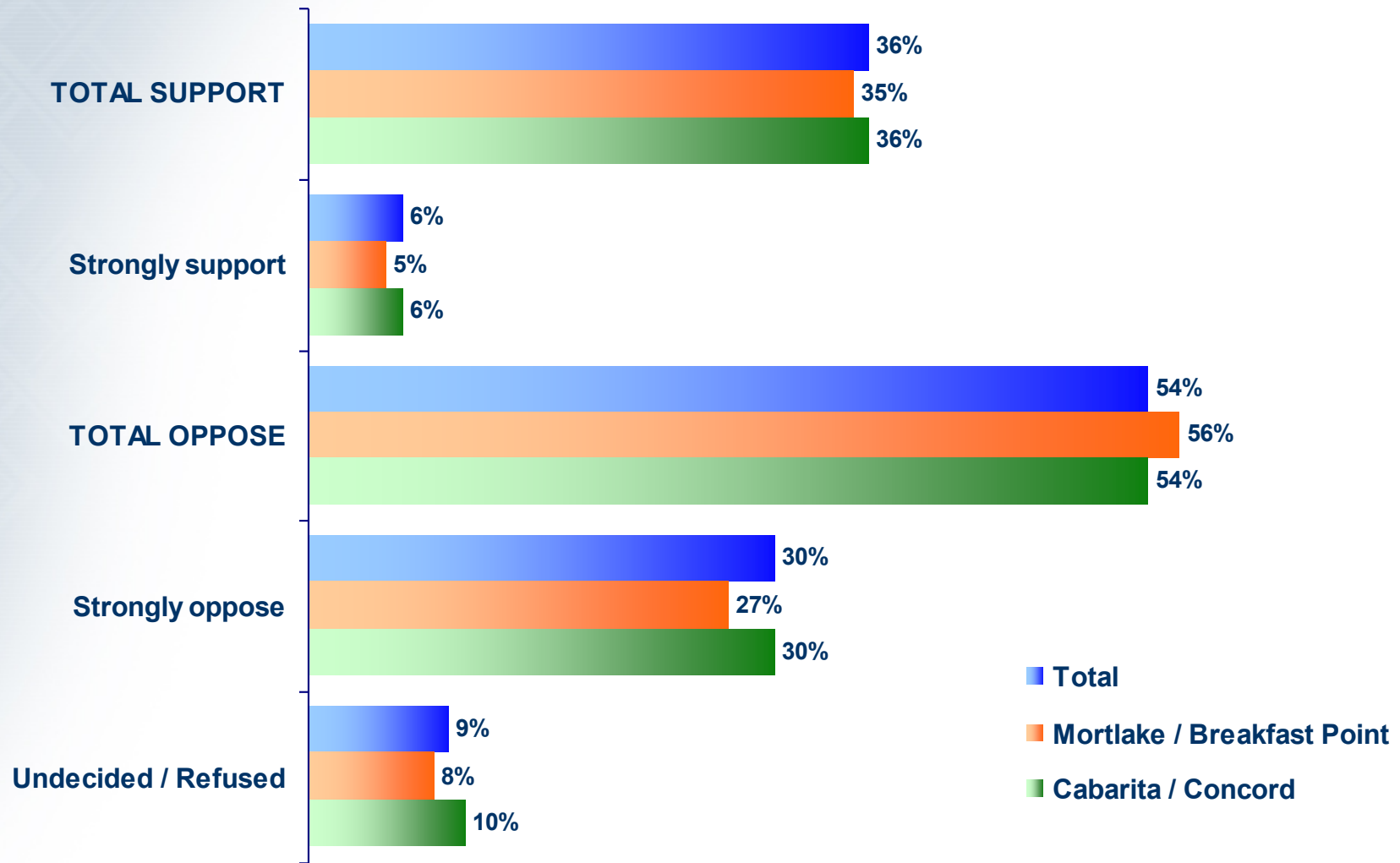
Q6b) And how did you become aware of the Mortlake development?

NB. Only asked for those respondents aware of the development (Definitely yes or Probably yes) [^]Small sample size n < 60



Initial opinion on the Proposed Development

More than half of local residents oppose the proposed development at this stage, with nearly a third 'strongly opposed'. However, support accounts for more than a third and 9% are still undecided.



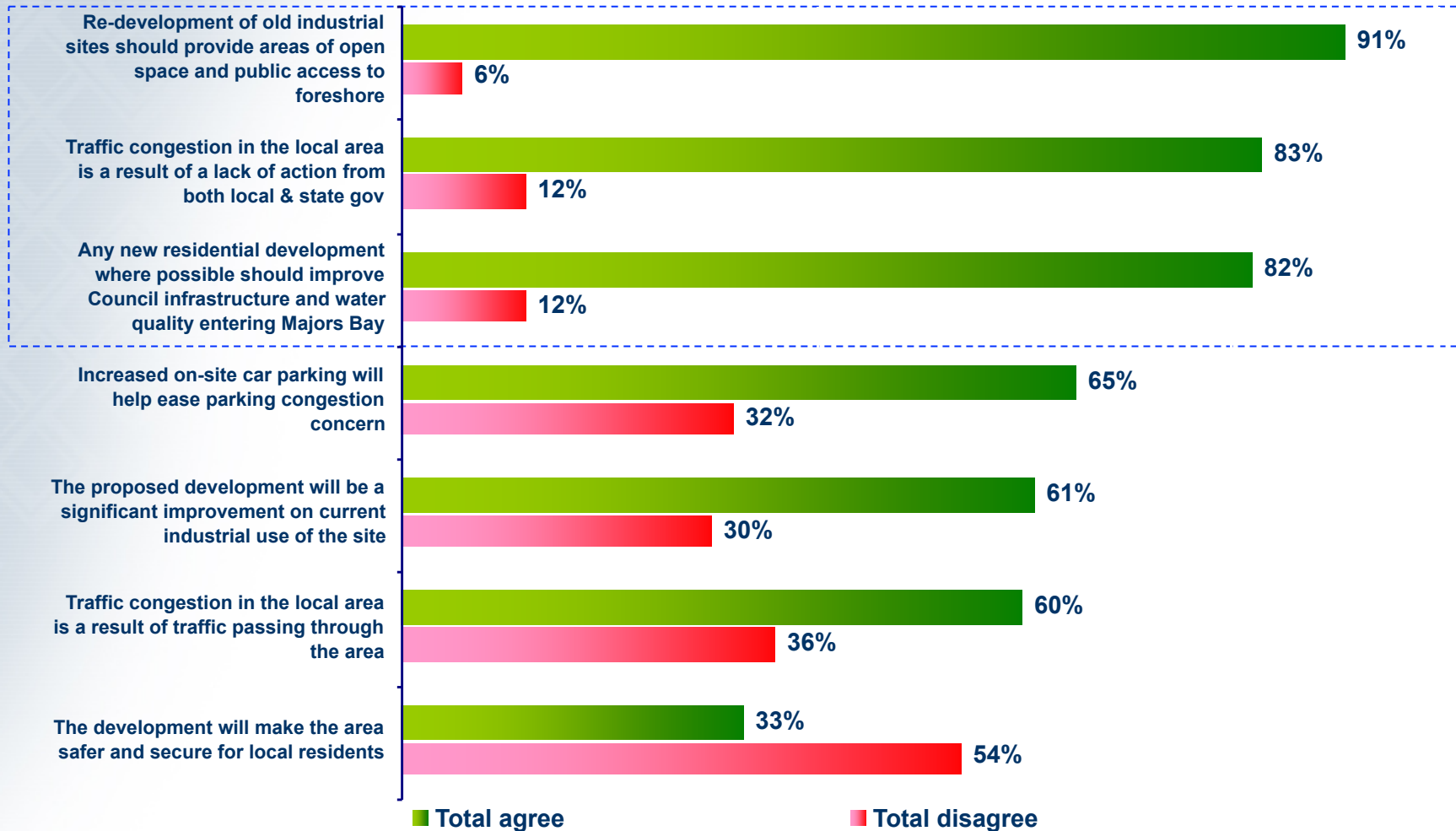


Messaging: Opinion Drivers

The most credible positive messaging are related to providing areas of open space and public access to foreshore, traffic congestion as a result of lack of action and new developments should improve Council infrastructure and water quality.



Positive statements



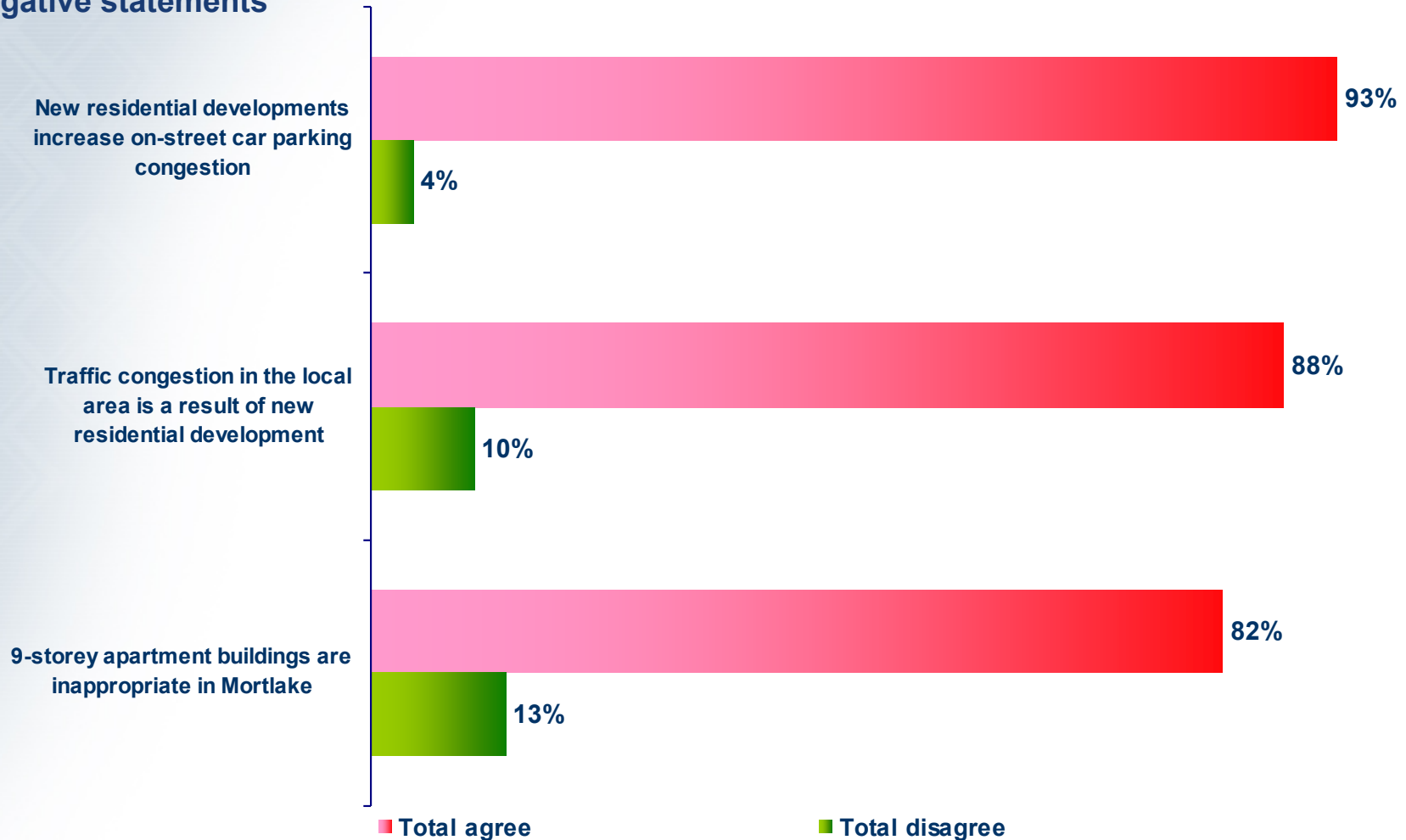
*Total agree= % Strongly agree + % Somewhat agree Total disagree = % Strongly disagree + % Somewhat disagree

Q8) I am now going to read you a list of statements that other people have used to argue the case for and against the proposed development at Mortlake. Regardless of your overall view, I want you to tell me whether you agree...

The most credible negative messaging tends to relate to increasing on-street car parking congestion, traffic congestion as a result of new residential development and 9-storey apartments are inappropriate in Mortlake.



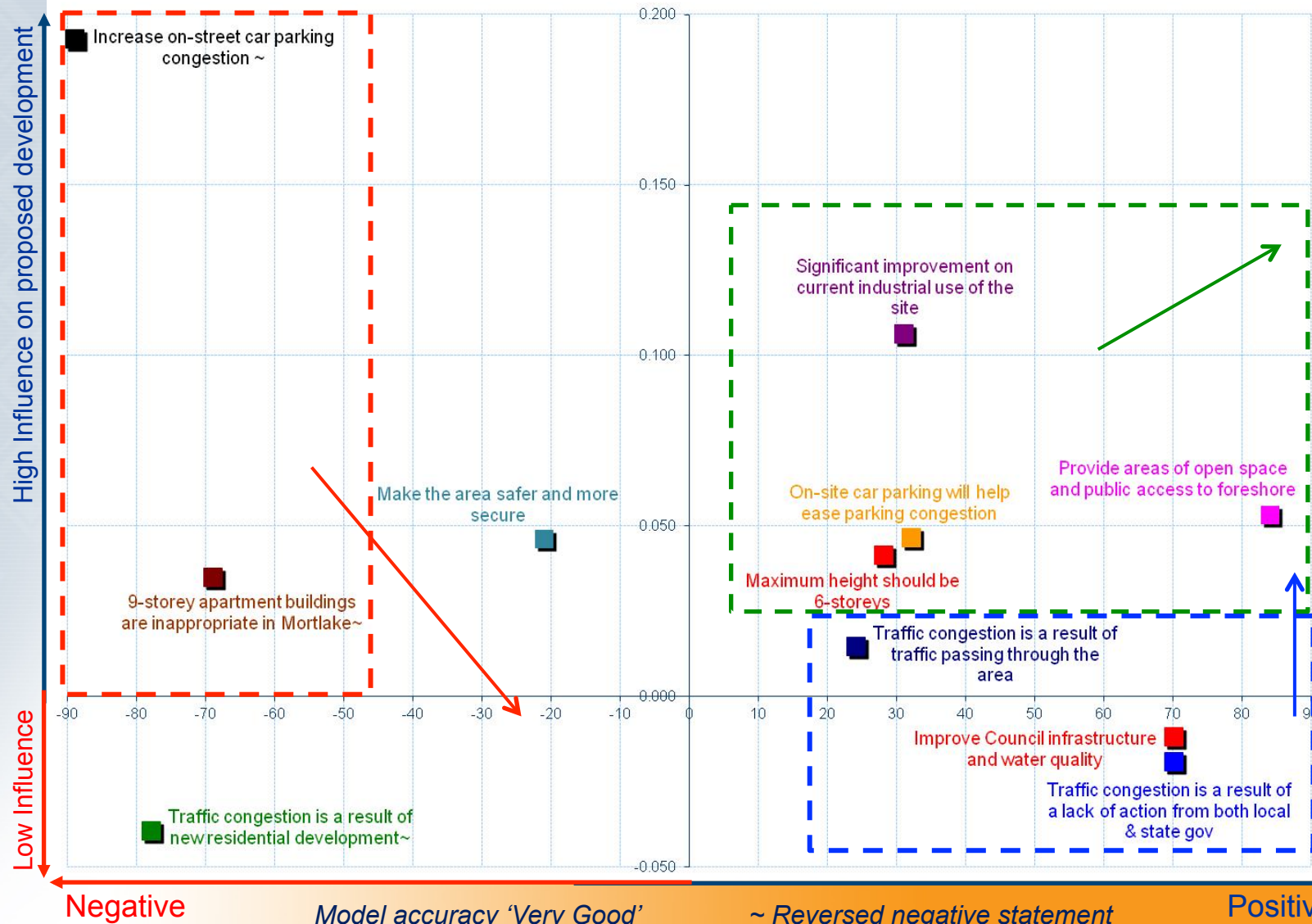
Negative statements



*Total agree= % Strongly agree + % Somewhat agree Total disagree = % Strongly disagree + % Somewhat disagree

Q8) I am now going to read you a list of statements that other people have used to argue the case for and against the proposed development at Mortlake. Regardless of your overall view, I want you to tell me whether you agree...

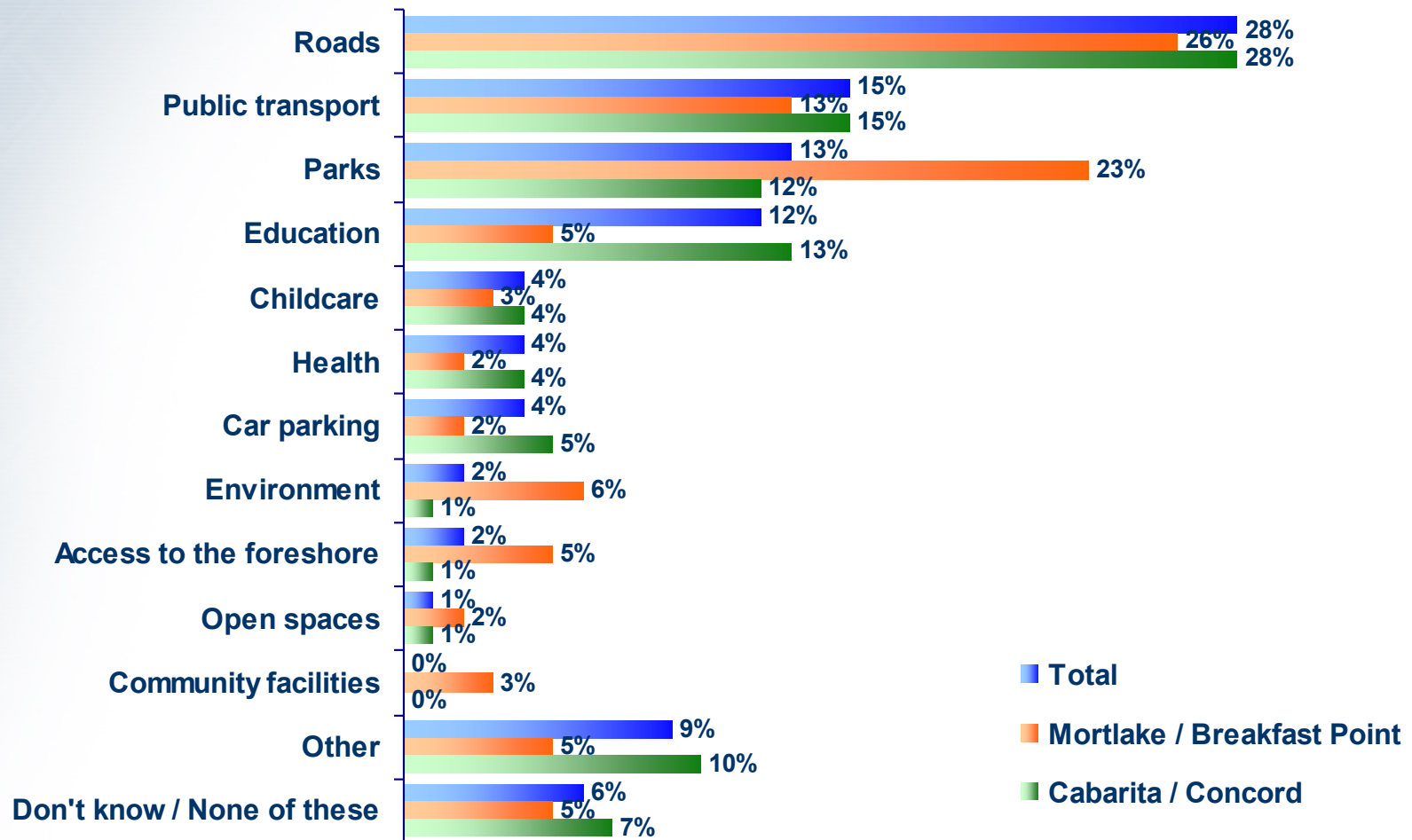
Our support driver analyses shows that the most negative message (increase on-street car parking congestion) is also the one having most effect on opposition.





Infrastructure & Development

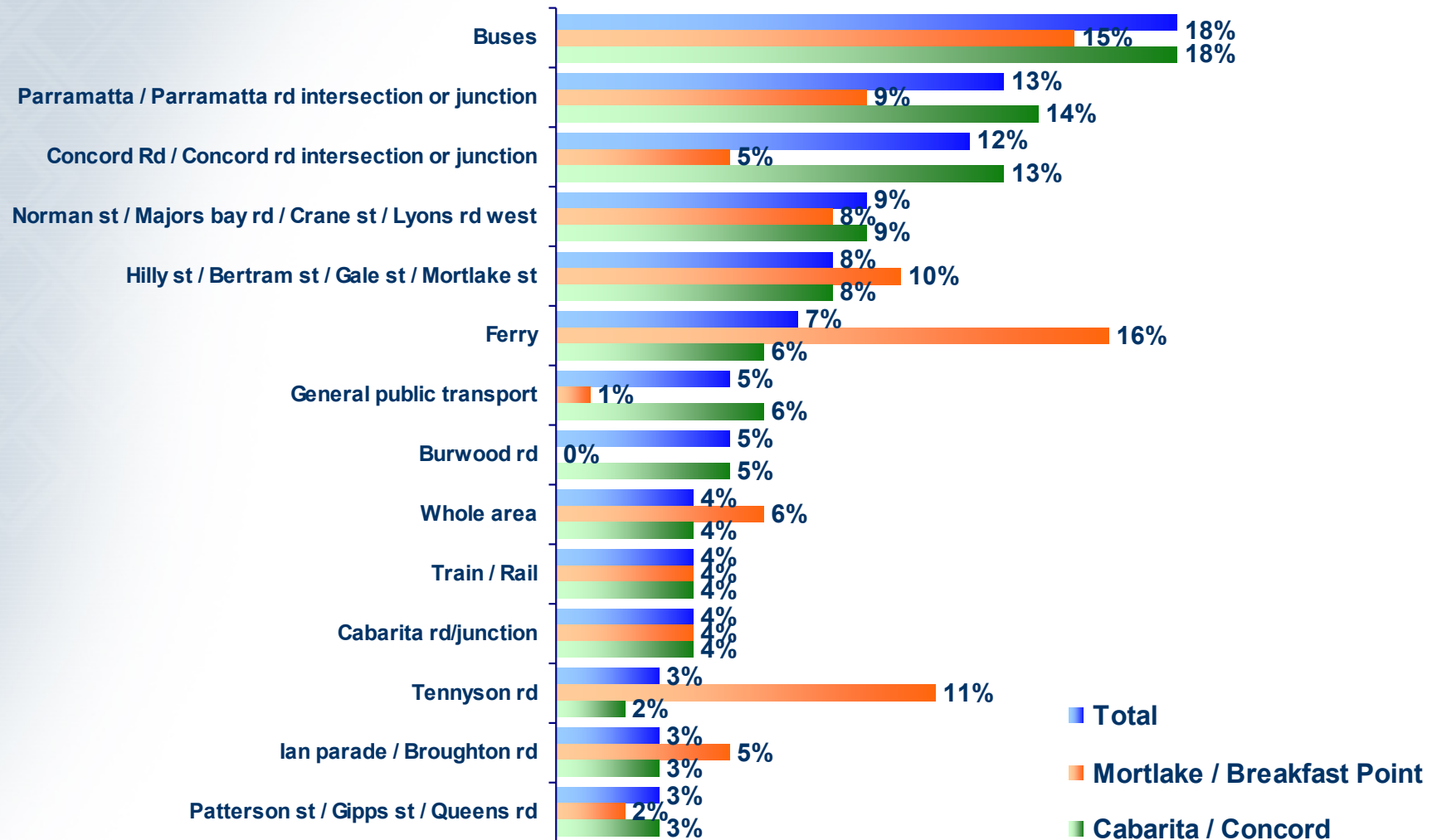
When introduced to the idea of the development investing in the local community, roads is by far the main area nominated, followed by public transport, parks and education.



Q9) When there is a large development in NSW, the developer is usually obliged to invest a specific amount in the local community. In the case of this Majors Bay development this is likely to be in the millions of dollars for local authorities to use for improving local services, infrastructure and amenities.

Regardless of your overall views of the development, and assuming it goes ahead, in what specific area would you like to have this money invested in?

Improve public transport services such as buses is the main priority, followed by Parramatta Rd and Concord Rd. Amongst residents in Mortlake and Breakfast Point, ferry services is the main priority.



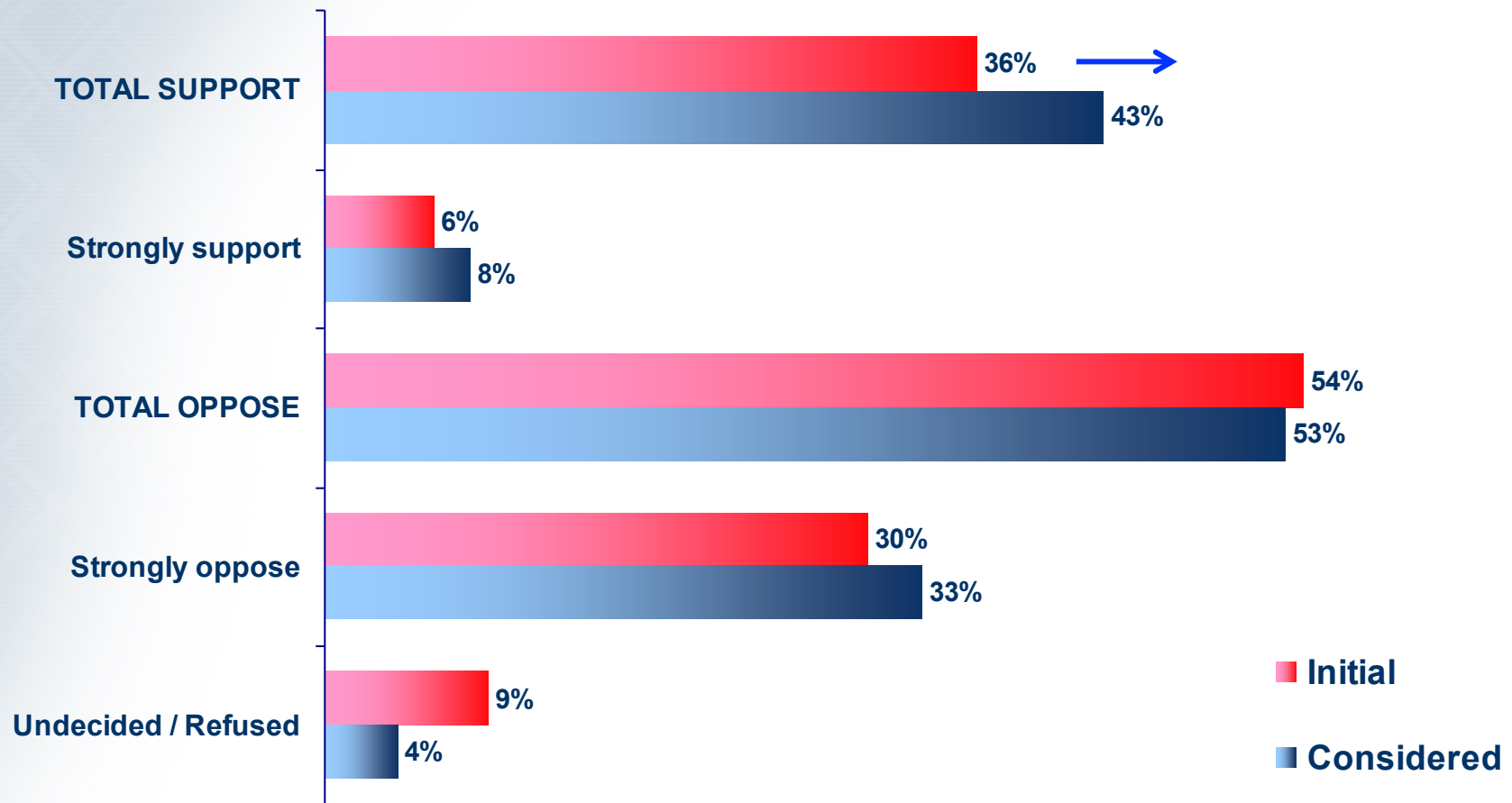
Q10) Assuming this funding were to be spent on improving local transport infrastructure or services, is there any specific road, intersection, set of lights or public transport service that you would like improvements made to?



Considered opinion on the Proposed Development



Exposure to messaging (positive and negative) and potential investment in the community was found effective at converting those currently undecided on the development to a position of support. Total support increased 7 points, while opposers decreased 1 point.

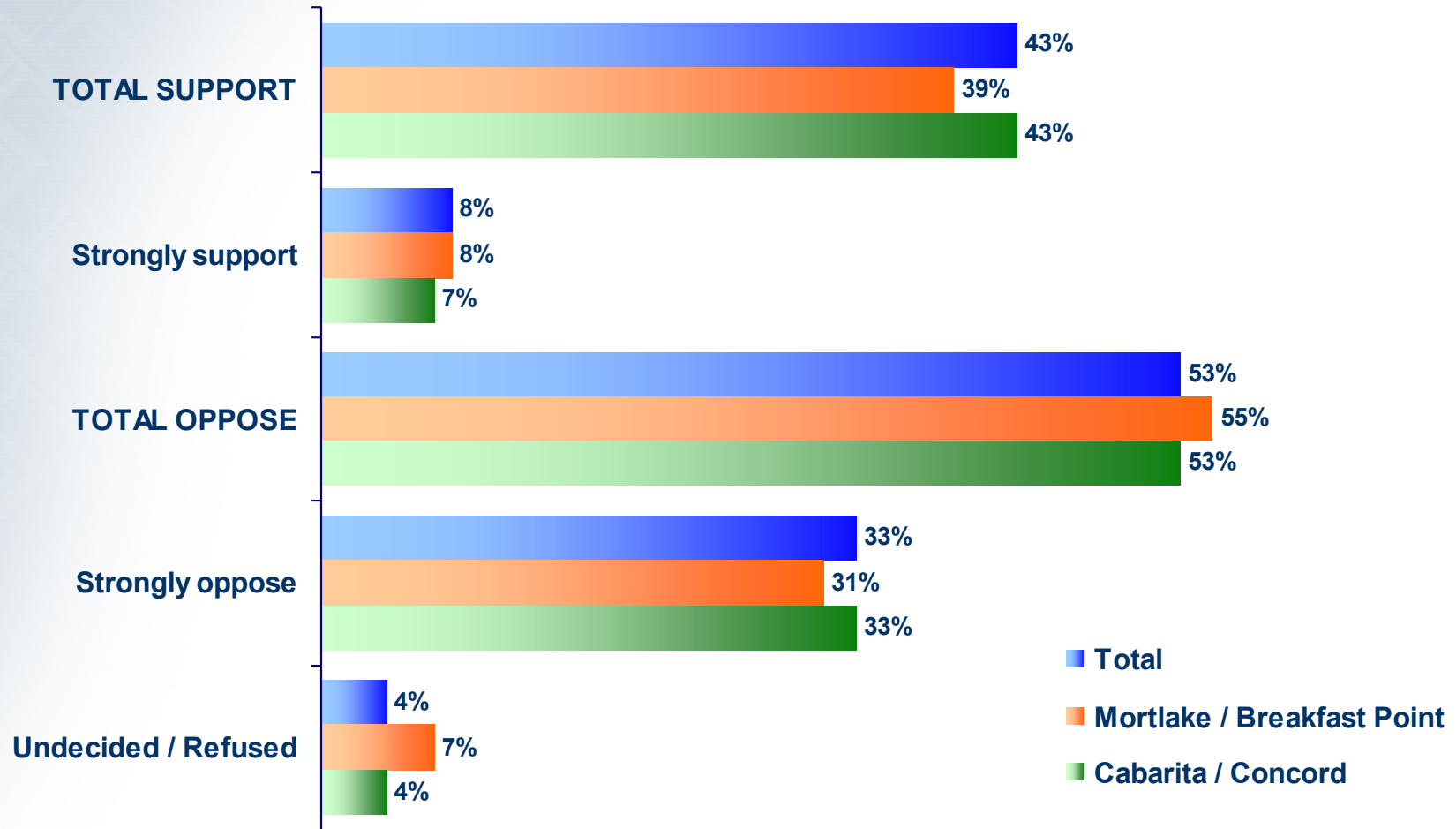


Q7) Based on what you know at this point in time, do you strongly support, somewhat support, somewhat oppose or strongly oppose this proposed development?

Q11) Sometimes people have heard and considered various arguments FOR and AGAINST a proposal they can change their minds. Given this, based on what you have now been told, do you strongly support, somewhat support, somewhat oppose or strongly oppose the proposed Majors Bay development?



Total support is consistent across all areas surveyed.



Q11) Sometimes people have heard and considered various arguments FOR and AGAINST a proposal they can change their minds. Given this, based on what you have now been told, do you strongly support, somewhat support, somewhat oppose or strongly oppose the proposed Majors Bay development?



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