

# Marrickville Metro Community Attitudes Survey

## Findings of Quantitative Research Conducted with Marrickville LGA Residents

Prepared at the request of Gadens Lawyers  
for the dominant purpose of providing  
legal advice to AMP Capital Investors

*Privileged & Confidential, July 2008*

**two**blind**mice**

theheadlinefindings



# marrickvillecommunityrespondswelltoexpansion

- A significant majority of Marrickville LGA residents find the concept of an upgraded & expanded Metro very appealing
- Not everyone is in favour of the centre being expanded, but these residents represent a minority
- Three unique segments emerge:



**Resisters**  
**19%**



**Enthusiasts**  
**27%**



**Pleased Critics**  
**54%**

# resistors **are** happy **with** the **status** quo

- > Generally speaking this segment is more satisfied with the various elements of the Marrickville LGA (eg. sense of community, shopping destinations)
- > They are the most likely to feel that it's important to always shop locally
- > And they are reluctant to admit that shopping may be better outside the Marrickville LGA
- > In their eyes:
  - there's nothing wrong with Marrickville Metro in its current format
  - it's not in need of a major upgrade
  - Marrickville Metro is comparable to other centres outside the LGA
- > But fundamentally, they believe an expanded Marrickville Metro won't deliver enough benefits to the community or the LGA
- > Consequently they find the concept of the expansion unappealing in most respects except for:
  - the added provision of more services (eg. banks), community facilities & public transport connections associated with the expansion
- > They are our most frequent visitors to Marrickville Metro

## Resistors (19%)



# the expansion is a welcomed bonus for enthusiasts

- > In their eyes:
  - like the Resistors segment, they don't have much to complain about when it comes to Marrickville Metro – they are pretty happy & already satisfied with the centre in its current format
  - but that's not to say it can't be improved either
  - they call for more variety of shops in the centre, before even hearing about the expansion
  - and once they do hear about the expansion concept, they are right behind it
- > Consequently they are our most enthusiastic segment in every respect & find practically every aspect of the expansion appealing
- > Like the Resistors segment, they too are fairly satisfied with the LGA overall
- > They are frequent visitors to Marrickville Metro and for them, the expansion is a welcomed addition to the centre and to a community that they are already happy with

## Enthusiasts (27%)



# the expansion promises to turn this segment around

- > In their eyes:
  - Marrickville Metro and the Marrickville LGA generally, do not satisfy their shopping needs
  - almost every aspect of the existing Marrickville Metro offering is criticised by this segment
  - so too is the general state of affairs with the LGA (transport, retail destinations, facilities for children, cleanliness)
  - and they think that shopping is better outside the LGA
- > Consequently they are our least frequent visitors to the centre
- > But the concept of the expansion certainly turns their opinions around about Marrickville Metro – they are very pleased with this idea
- > And the majority of this segment promises to visit Marrickville Metro more frequently as a result of the expansion
- > Interestingly this is a younger segment and has the highest household income

## Pleased Critics (54%)



# a quick profile of the segments reveals subtle skews

Column1	Total	Resistors	Enthusiasts	Pleased Critics
	n=1201	n=243	n=301	n=657
<b>Residence</b>	%	%	%	%
Live in Marrickville	27	↑ 33	→ 28	↓ 25
Live elsewhere	73	↑ 67	↑ 72	↑ 75
Camperdown	9	↓ 6	→ 8	↑ 10
Dulwich Hill	14	↓ 11	↑ 14	↑ 15
Enmore	4	↑ 5	↓ 4	↓ 4
Lewisham	3	→ 3	↓ 2	↑ 4
Marrickville	27	↑ 33	→ 28	↓ 25
Newtown	17	↑ 21	→ 18	↓ 16
Petersham	9	↓ 8	↓ 8	↑ 10
St. Peters	3	↑ 4	↓ 2	→ 3
Stanmore	9	↓ 5	↑ 9	↑ 10
Sydenham	1	1	1	1
Tempe	4	↓ 3	↑ 4	↓ 3

Arrows indicate the segment is either over-indexed, neutral, or under-indexed on that attribute  
 Totals may not add to exactly 100% as some respondents answered 'Don't know'



# a quick profile of the segments reveals subtle skews

Column1	Total	Resistors	Enthusiasts	Pleased Critics
	n=1201	n=243	n=301	n=657
<b>Gender</b>	%	%	%	%
Male	50	↑ 54	↓ 49	↓ 49
Female	50	↓ 46	↑ 51	↑ 51
<b>Age</b>	%	%	%	%
18-29 yrs	26	↓ 12	↑ 32	↑ 30
30-39 yrs	26	↑ 30	↓ 19	↑ 29
40-49 yrs	18	↑ 19	↓ 15	↑ 19
50+ yrs	30	↑ 39	↑ 34	→ 22
<b>Mean household income</b>	\$82,700	↓ \$74,900	↓ \$71,600	↑ \$90,400
<b>Work status</b>	%	%	%	%
Full time	51	↓ 46	↓ 44	↑ 56
Part time	17	↑ 23	↓ 10	→ 18
Not working	32	↓ 31	↑ 46	↓ 26
<b>Work location</b>	%	%	%	%
In the Marrickville LGA	16	↑ 17	↓ 14	↑ 17
In the Sydney CBD	40	↓ 29	↑ 40	↑ 43
Somewhere else	44	↑ 54	→ 47	↓ 40

Arrows indicate the segment is either over-indexed, neutral, or under-indexed on that attribute  
 Totals may not add to exactly 100% as some respondents answered 'Don't know'

# a quick profile of the segments reveals subtle skews

Column1	Total		Resistors		Enthusiasts		Pleased Critics
	n=1201		n=243		n=301		n=657
	%		%		%		%
<b>Overall satisfaction of Marrickville Metro (% satisfied)</b>	46	↑	70	↑	73	↓	25
<b>Average no. visits to Marrickville Metro per month</b>	5.2	↑	6.3	↑	5.9	↓	4.4
<b>Main place for food &amp; groceries</b>	%		%		%		%
Marrickville Metro	46	→	52	↑	60	↓	37
<b>Main place for clothes, homewares &amp; gifts</b>	%		%		%		%
Marrickville Metro	21	↑	31	↑	33	↓	12
Sydney CBD	18	↓	10	↑	18	↑	21
Broadway	16	↓	10	→	14	↑	18
<b>Main transport used for grocery shopping</b>	%		%		%		%
Car	64	↓	53	→	59	↑	70
Walking	24	↑	34	→	25	↓	19

Arrows indicate the segment is either over-indexed, neutral, or under-indexed on that attribute  
 Totals may not add to exactly 100% as some respondents answered 'Don't know'

# a quick profile of the segments reveals subtle skews

Column1	Total	Resistors	Enthusiasts	Pleased Critics
	n=1201	n=243	n=301	n=657
<b>Personal connections</b>	%	%	%	%
Marrickville Council	2	↑ 3	→ 2	↓ 1
Marrickville Chamber of Commerce	0	0	0	0
<b>Household connections</b>	%	%	%	%
Marrickville Council	1	↑ 1	↑ 1	↓ 0
Marrickville Chamber of Commerce	0	0	0	0
<b>Work in retail in the Marrickville LGA</b>	%	%	%	%
Yes - in store on a road/strip	1	↑ 2	↓ 1	↓ 1
Yes - in Marrickville Metro	1	↓ 0	↑ 1	↑ 1

Arrows indicate the segment is either over-indexed, neutral, or under-indexed on that attribute  
 Totals may not add to exactly 100% as some respondents answered 'Don't know'

**researchcontext**

## The background to this research

- > Marrickville Metro is a sub-regional shopping centre located in the inner south-western suburbs of Sydney, approximately 5kms south-west of the Sydney CBD
- > The retail component of the centre is provided over one level, with car parking provision of 1,100 spaces on the rooftop
- > The centre's majors include Woolworths, Kmart and Aldi along with 110 specialty stores and a wide variety of services including RTA, NRMA, banks and Australia Post
- > The centre also provides a strong fresh food offer
- > Plans for the future growth of the centre are under development
- > In order to ensure that the wishes and expectations of the community surrounding the centre are included in these plans, AMP Capital has conducted research with local area residents
- > AMP Capital will use the insights from this research to improve the offering at Marrickville Metro in line with community expectations and to be able to properly address any community concerns that arise

**This document present the findings from this latest quantitative stage of research. The qualitative research findings may be found under separate cover**

## A programme of market research – commencing with qualitative exploration & finishing with quantitative measurement

On-the-ground familiarisation  
visited all major shopping destinations in the area  
[orientating TBM]

Exploratory qualitative research, Feb 08  
exploring community attitudes, perceptions & behaviours  
[hypotheses building]



Definitive quantitative research, May 08  
measuring community attitudes  
[hypotheses testing]



## Very extensive qualitative preparation for the quantitative stage

Exploratory qualitative research, Feb 08  
exploring community attitudes, perceptions & behaviours  
[hypotheses building]



## Research design & methodology

Definitive quantitative research, May 08  
measuring community attitudes  
[hypotheses testing]



- > Quantitative research:
  - based on hypotheses developed from the qualitative phase (focus groups with residents & indepth interviews with retailers inside Marrickville Metro & outside )
  - questionnaire developed by TBM in close consultation with AMP Capital Investors team
- > Telephone interviews conducted by independent field agency
- > Respondents were adults 18+, living in Marrickville LGA
- > Twenty minute interview duration (average 22 minutes)
- > Pilot survey conducted (n=20) to refine questionnaire
- > 1,201 completed interviews in main study
  - error margin  $\pm 3\%$
- > Stratified sampling method employed
- > Data weighted to published ABS statistics of Marrickville LGA
- > Fieldwork period 28<sup>th</sup> April – 7<sup>th</sup> May, 2008
- > Three \$250 shopping vouchers offered to boost participation

A very smooth but exhaustive fieldwork process



## A snapshot of our final dataset

	N	%
<b>Gender</b>		
Male	600	50
Female	601	50
<b>Age</b>		
18-19	29	2
20-24	136	11
25-29	158	13
30-34	170	14
35-39	150	12
40-44	119	10
45-49	98	8
50-54	82	7
55-59	70	6
60-64	52	4
65-69	41	3
70-74	35	3
75+ years	61	5
<b>Area</b>		
Camperdown	103	9
Dulwich Hill	169	14
Enmore	51	4
Lewisham	39	3
Marrickville	325	27
Newtown	207	17
Petersham	107	9
St Peters	38	3
Stanmore	104	9
Sydenham	14	1
Tempe	44	4

	N	%
<b>Occupation</b>		
Home duties	76	6
Student	109	9
Sales/personal services	102	8
Operator/labourer	43	4
Clerical	73	6
Retired/superannuated	144	12
Para-professional	79	7
Professional/managerial	455	38
Trades	66	6
Unemployed	43	4
<b>Work status</b>		
Full time	613	51
Part time	204	17
<b>Household structure</b>		
Single living at home (eg. with parents)	151	13
Single living alone or sharing with others, no kids	347	29
Married/de facto, no kids at home	282	24
Married/de facto, kids at home	302	25
Single parent/widowed/divorced/separated, no kids	49	4
Single parent/widowed/divorced/separated, kids at home	46	4
Other (specify)	24	2
<b>Shopper status</b>		
Sole or main grocery buyer	680	57
Shared grocery buyer	439	37
Rare or non grocery buyer	81	7



**638 (53%) of the 1201 respondents agreed to take part in future research projects on Marrickville Metro – a great dbase for us to harness moving forward**

## A summary of the call analysis

Label	Total
Terminate B1 (Industry )	65
Terminate B2a -12 (outside LGA )	64
Terminate B2b ( Not correct LGA )	77
Terminate B4 ( Under 18 years )	11
Terminate during interview too long	-
Refused NFI	6,411
Completed interview	1,201
No answer	5,725
Answer machine	3,298
Engaged	327
Soft callback	679
Hard callback	269
Disconnected number	30
Fax/Modem	375
Business number	32
Quota fulls	29
Dead numbers	7,211
Away for duration of study	196
<b>Total</b>	<b>26,000</b>
Interview length average	22.25 minutes
Complaints forwarded to client	0
Queries about validity of study	0

A huge fieldwork effort

**detailedfindings**

**currentshoppingbehaviours**

## More people have visited Marrickville Metro (at least once) in the last 6 months than any other shopping destination

In the last 6 months, which of these destinations have you visited for shopping, services, entertainment or eating out? Any others?

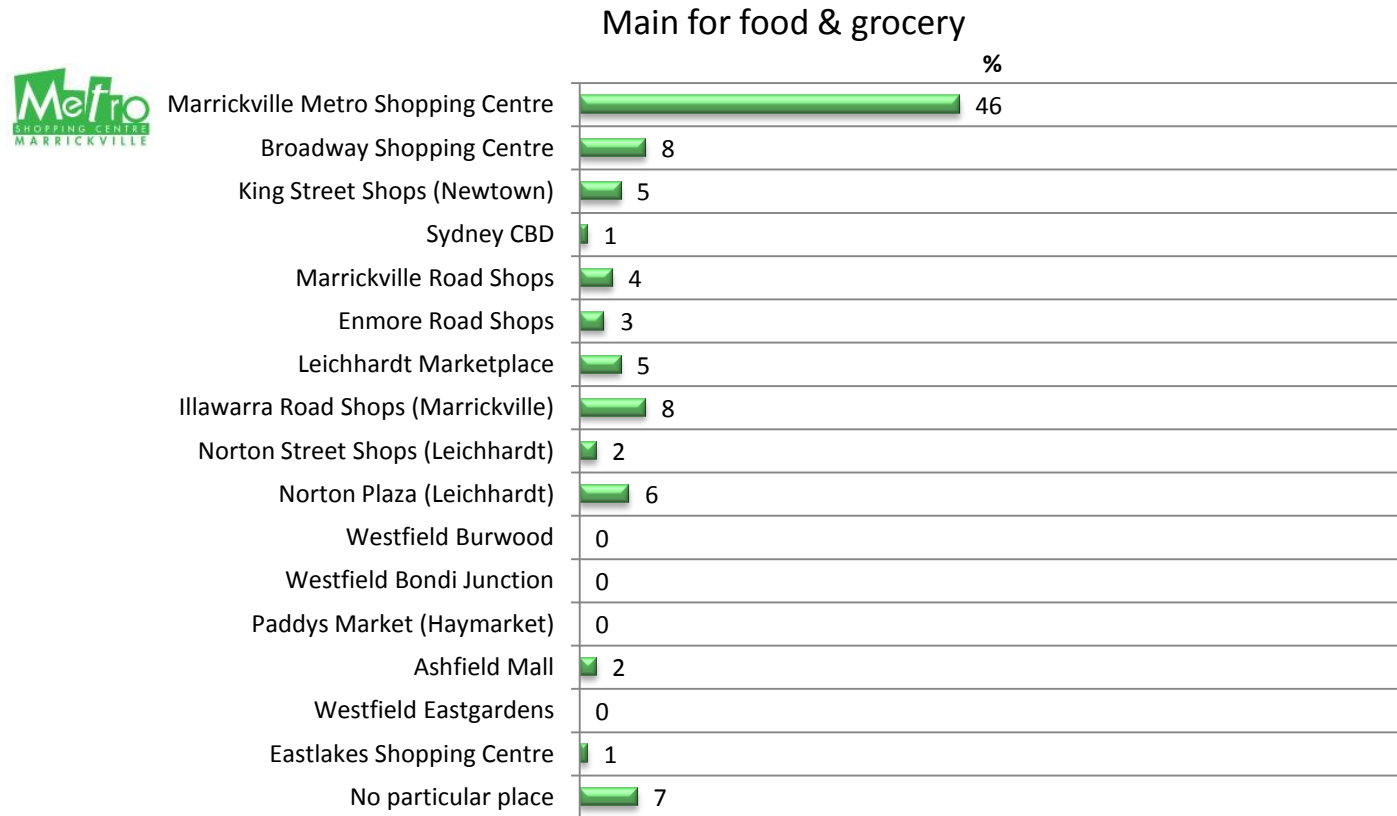


Marrickville Metro 'touching' most residents in the last 6 months

Totals may not add to exactly 100% as some respondents answered 'Don't know'

## Marrickville Metro is nominated by more people as their main destination for food & grocery shopping

Which place would be your main one for food & grocery shopping?



Totals may not add to exactly 100% as some respondents answered 'Don't know'

## The race for clothing, homewares & gifts is contested by four key destinations, including Marrickville Metro

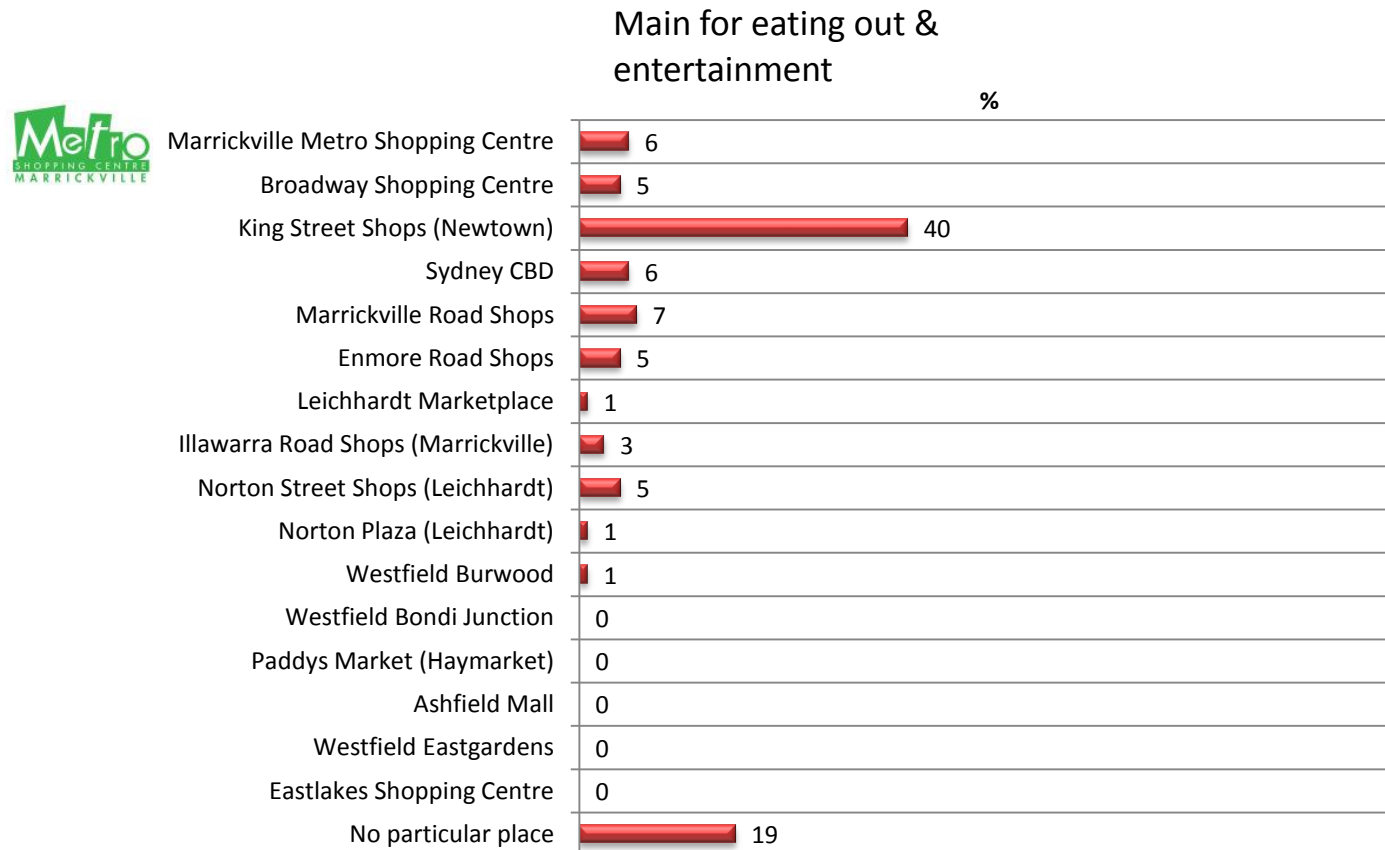
Which place would be your main one for clothes, homewares & gifts?



Totals may not add to exactly 100% as some respondents answered 'Don't know'

## King Street Newtown dominates eating out & entertainment

Which place would be your main one for eating out and entertainment?



Marrickville Metro Shopping Centre

Broadway Shopping Centre

King Street Shops (Newtown)

Sydney CBD

Marrickville Road Shops

Enmore Road Shops

Leichhardt Marketplace

Illawarra Road Shops (Marrickville)

Norton Street Shops (Leichhardt)

Norton Plaza (Leichhardt)

Westfield Burwood

Westfield Bondi Junction

Paddys Market (Haymarket)

Ashfield Mall

Westfield Eastgardens

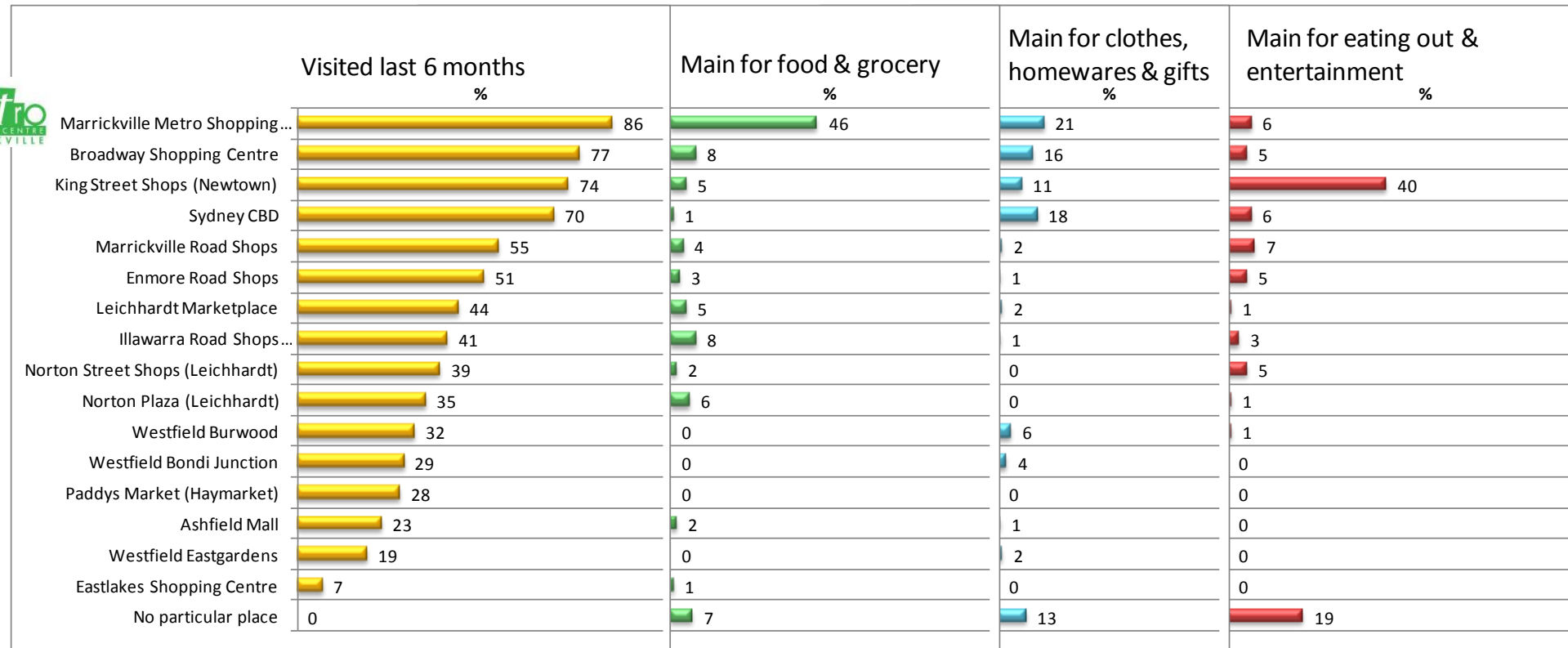
Eastlakes Shopping Centre

No particular place



## A snapshot of all these measures combined

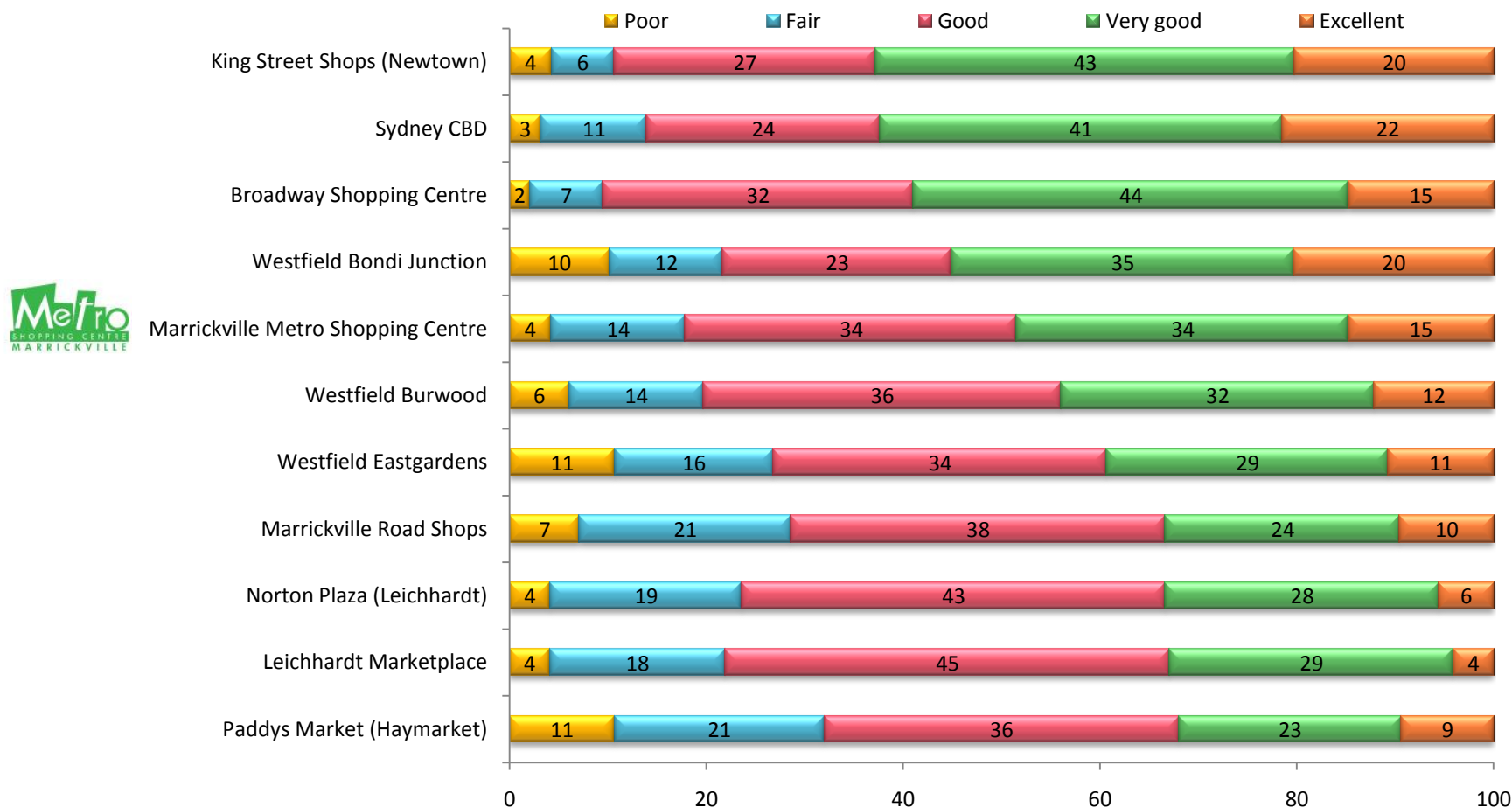
All types of visitation combined on the one slide



Totals may not add to exactly 100% as some respondents answered 'Don't know'

## Marrickville Metro scoring well in terms of overall satisfaction, but not outstanding

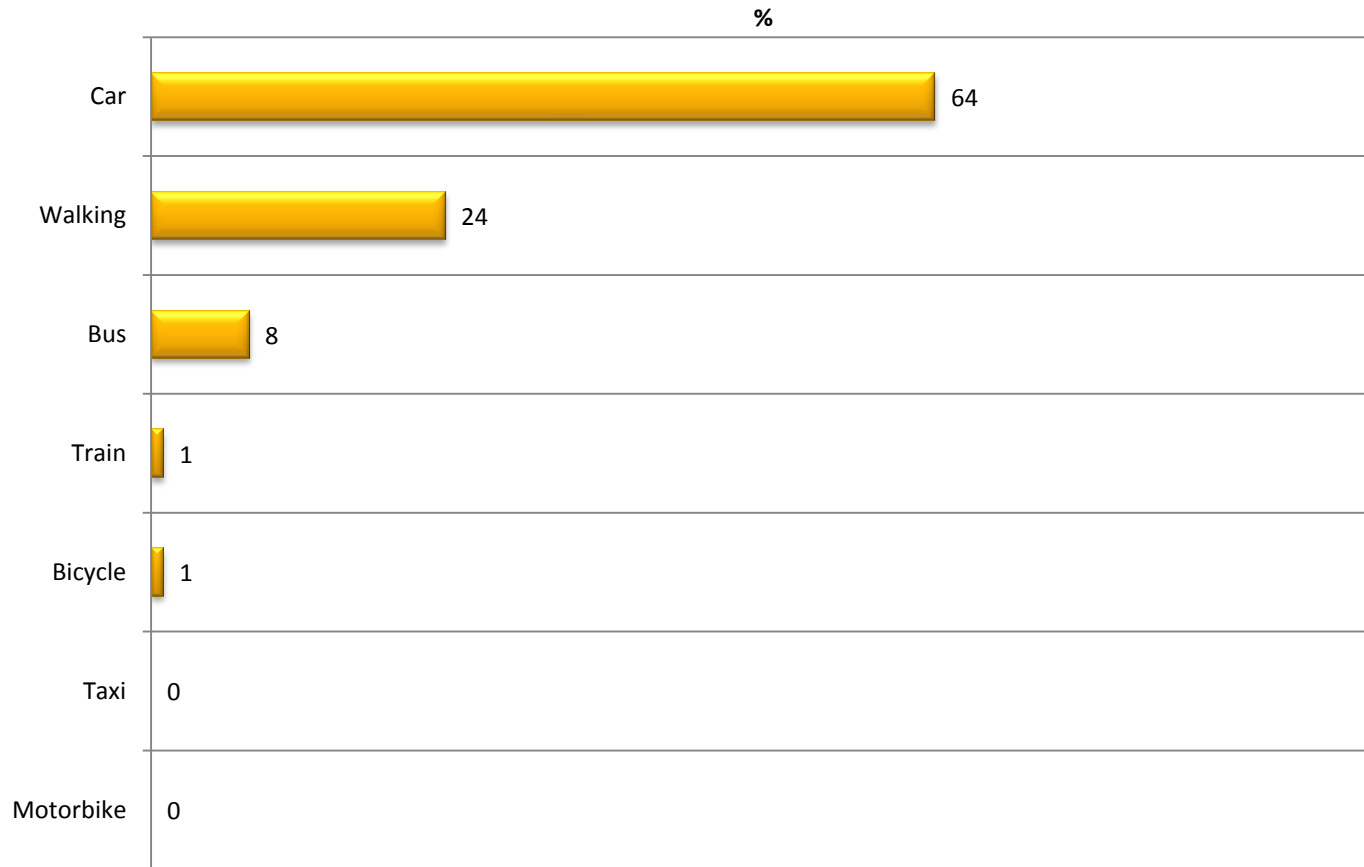
Now I'd like to know your overall satisfaction for a few different places that I will read out to you. It doesn't matter if you have been there lately or not, just take everything you feel about that place into account, the overall experience, and your overall satisfaction. (For those that could rate it!)



Totals may not add to exactly 100% as some respondents answered 'Don't know'

## Very little use of public transport for food & grocery shopping. Pedestrian traffic relatively high in this area

Thinking about where you do your grocery shopping, which type of transport do you mainly use to do your grocery shopping?



Totals may not add to exactly 100% as some respondents answered 'Don't know'

attitudes towards shopping  
in the marrickville LGA

## Sentiment is strong towards local shopping, as witnessed in the qualitative research

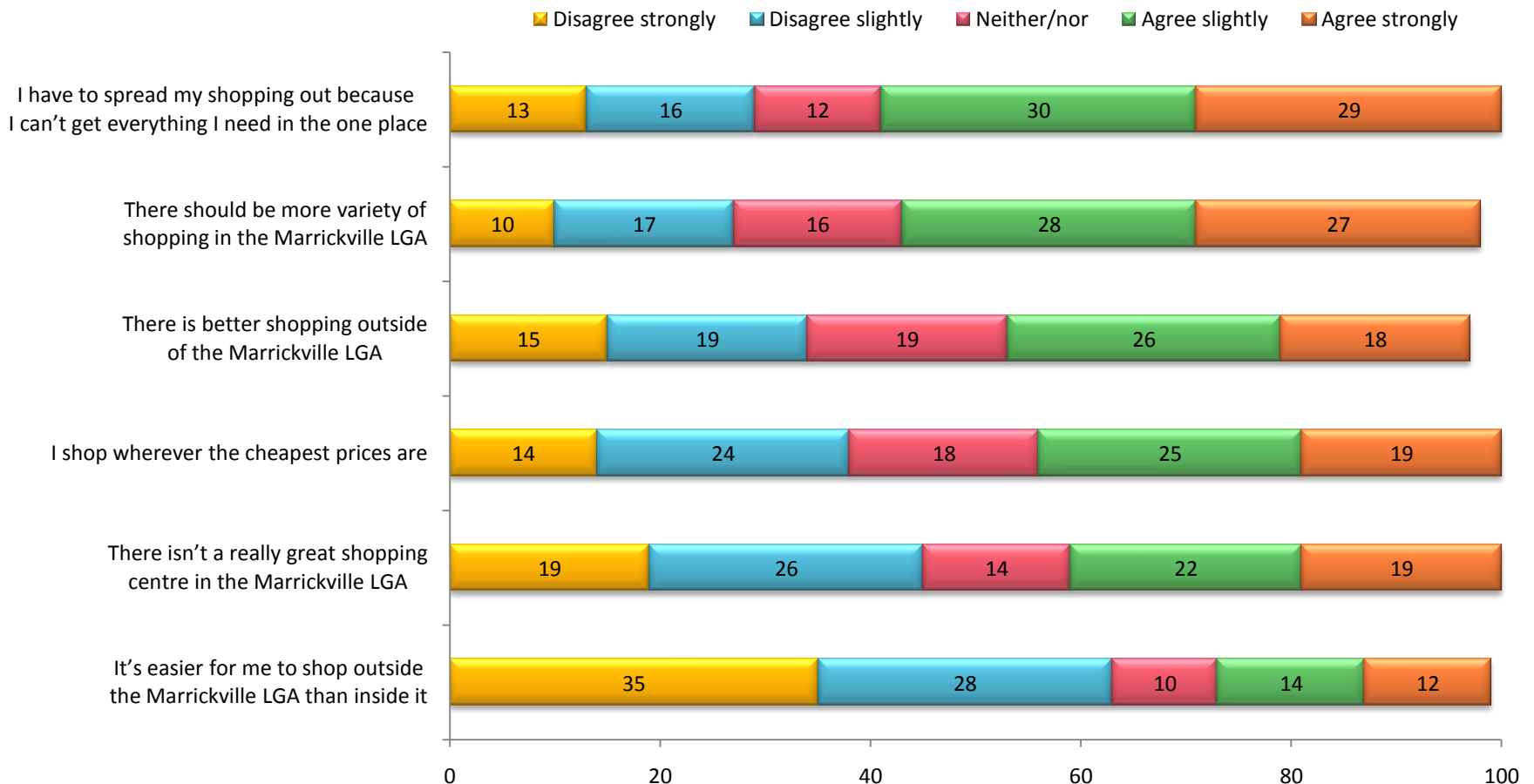
Which of these statements best describes your attitude towards shopping locally within the Marrickville LGA?



Totals may not add to exactly 100% as some respondents answered 'Don't know'

## Opinions are fairly divided when it comes to evaluating the shopping landscape in the LGA

I'm going to read some statements that have been made about shopping in the Marrickville LGA and I'd like you to tell how strongly you agree or disagree with the statement?



Totals may not add to exactly 100% as some respondents answered 'Don't know'

## Most people preferring both strip & centre shopping styles. Only one in five residents preferring strip shopping

And which of the following statements best describes your preferred way to shop?



Totals may not add to exactly 100% as some respondents answered 'Don't know'

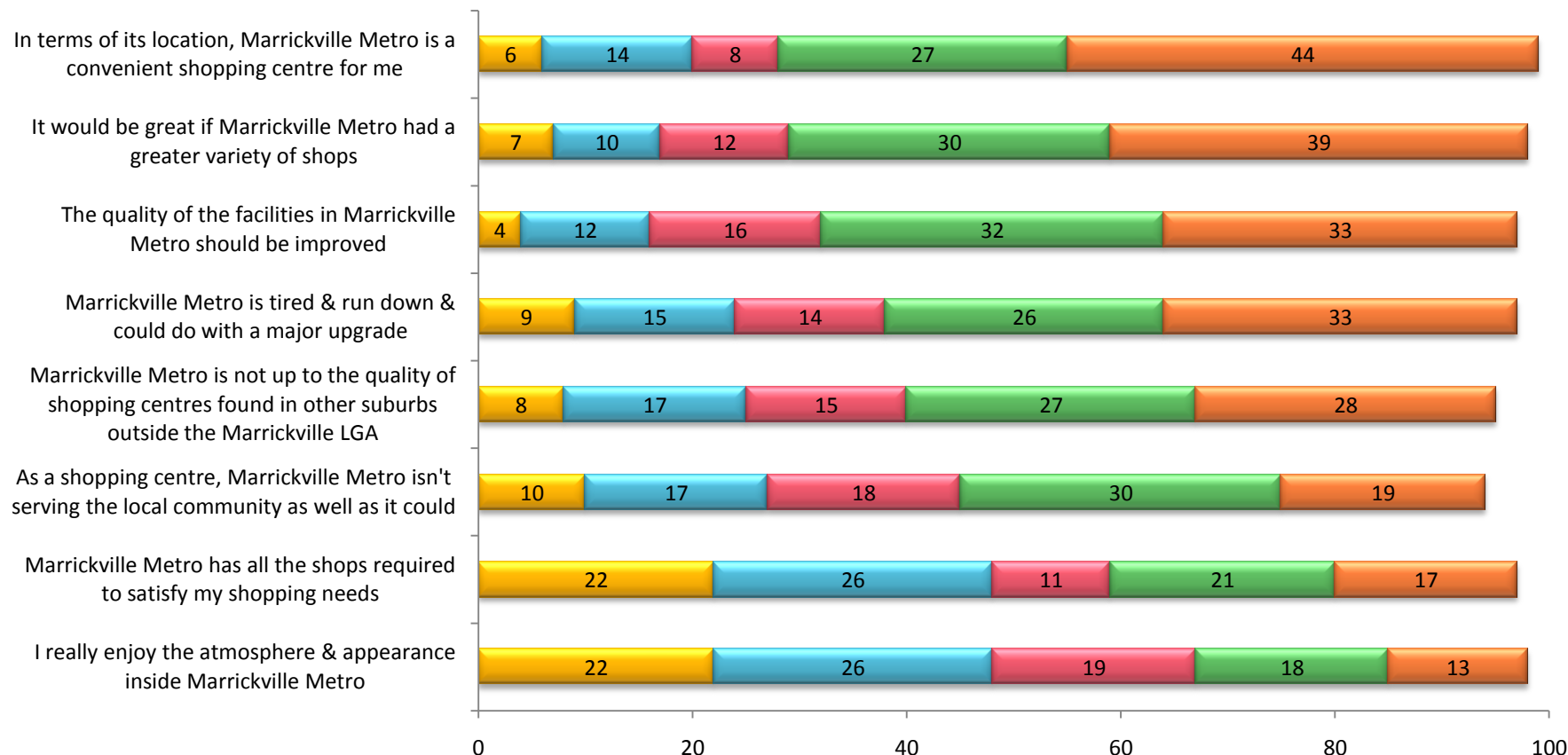
current perceptions of  
marrickville metro



## These attitudes reflect the learnings from our qualitative research – that being that Marrickville Metro is in need of refurbishment

I would like you to tell me how strongly you agree or disagree with a number of statements that people have made about Marrickville Metro. We're interested in your opinions – it doesn't matter if you don't shop there very often

Disagree strongly Disagree slightly Neither/nor Agree slightly Agree strongly



Note too that the vast majority of residents acknowledge the convenient location of Marrickville Metro

Totals may not add to exactly 100% as some respondents answered 'Don't know'

response to the concept of  
expanding marrickville metro

## Residents were read a description of the proposed upgrade & expansion



### > IF UNAWARE OF MARRICKVILLE METRO: READ OUT DESCRIPTION OF CENTRE AND LOCATION:

- Marrickville Metro is in Victoria Street, Marrickville. It has a Woolworths, Kmart, Aldi and a food court, and a wide range of fresh food and specialty shops. The centre also has the RTA, the ANZ & St George banks, cafes and a medical centre, and is an easy walk from nearby houses or can be accessed by car, bike or public transport.

### > FOR ALL: READ OUT:

- Now I'll ask you how you would feel if the existing Marrickville Metro shopping centre was upgraded & expanded. First I will read you a broad idea about the potential changes that could be made to Marrickville Metro and then ask for your feedback .
- None of this is concrete yet – we are only asking for your feedback based on these ideas.
- Marrickville Metro Shopping Centre is considering plans for an expansion. A potential expansion of Marrickville Metro could involve the inclusion of additional services for shoppers such as:

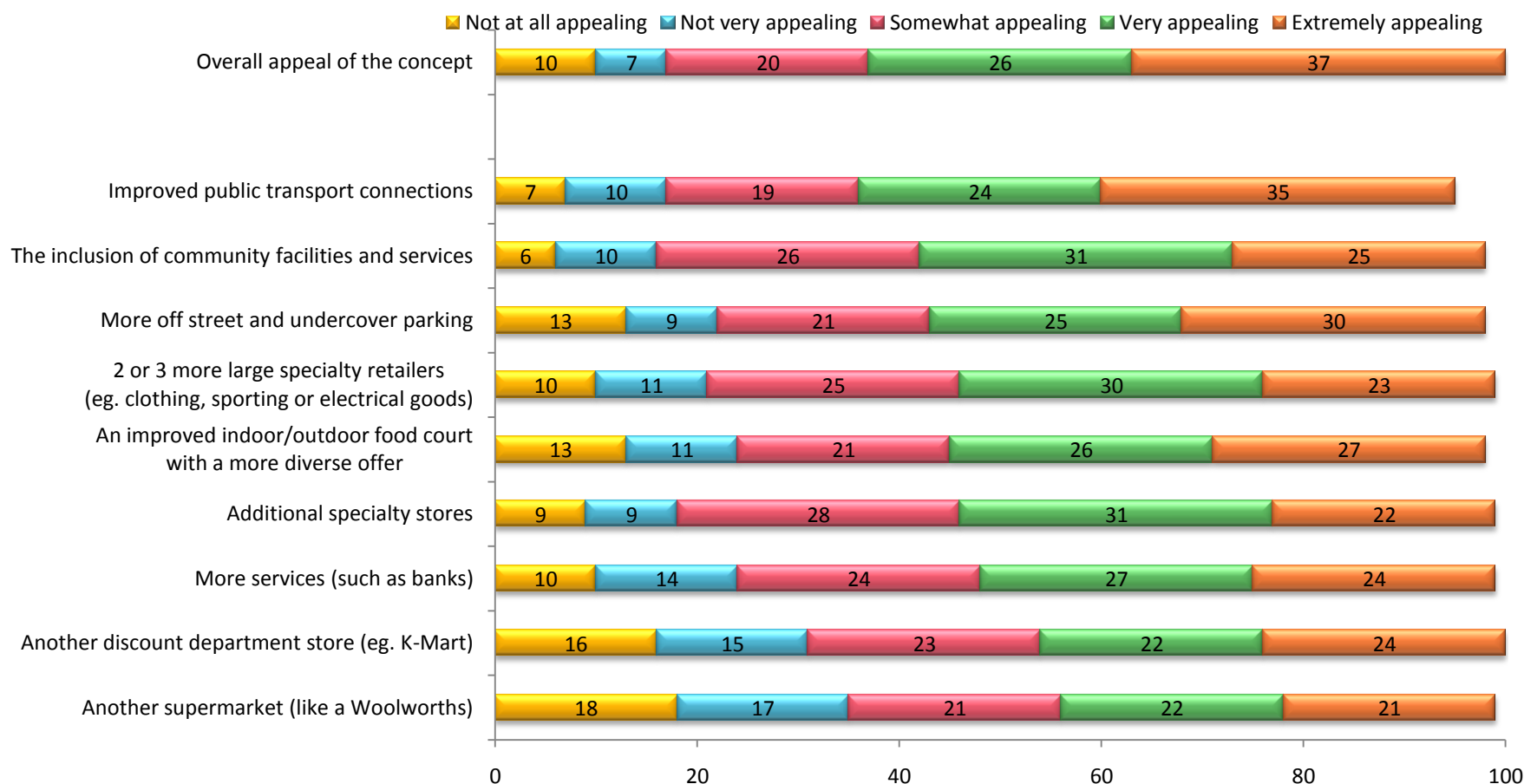
>

- **another** discount department store (like a K-Mart)
- **another** supermarket (like a Woolworths)
- 2 or 3 **more** large specialty retailers (such as clothing, sporting goods or electrical goods stores)
- an **improved** indoor/outdoor food court with a **more** diverse offer
- an **additional** 50 specialty stores (including fashion, homewares, music and entertainment)
- **more** services such as banks
- **more** off street and undercover parking
- **improved** public transport connections
- the inclusion of community facilities and services

Residents were asked to evaluate this concept overall, and then read out the individual elements for further evaluation

## Appeal is solid across most elements of the expansion. However there is a small contingent of residents who find the idea unappealing – we'll delve more into this in a moment

Overall, taking into consideration everything I've just mentioned to you, how appealing do you find the overall concept for expanding Marrickville Metro? Okay, now I'm going to read out one feature of the expansion at a time and ask you how appealing you find that particular part of the plan.



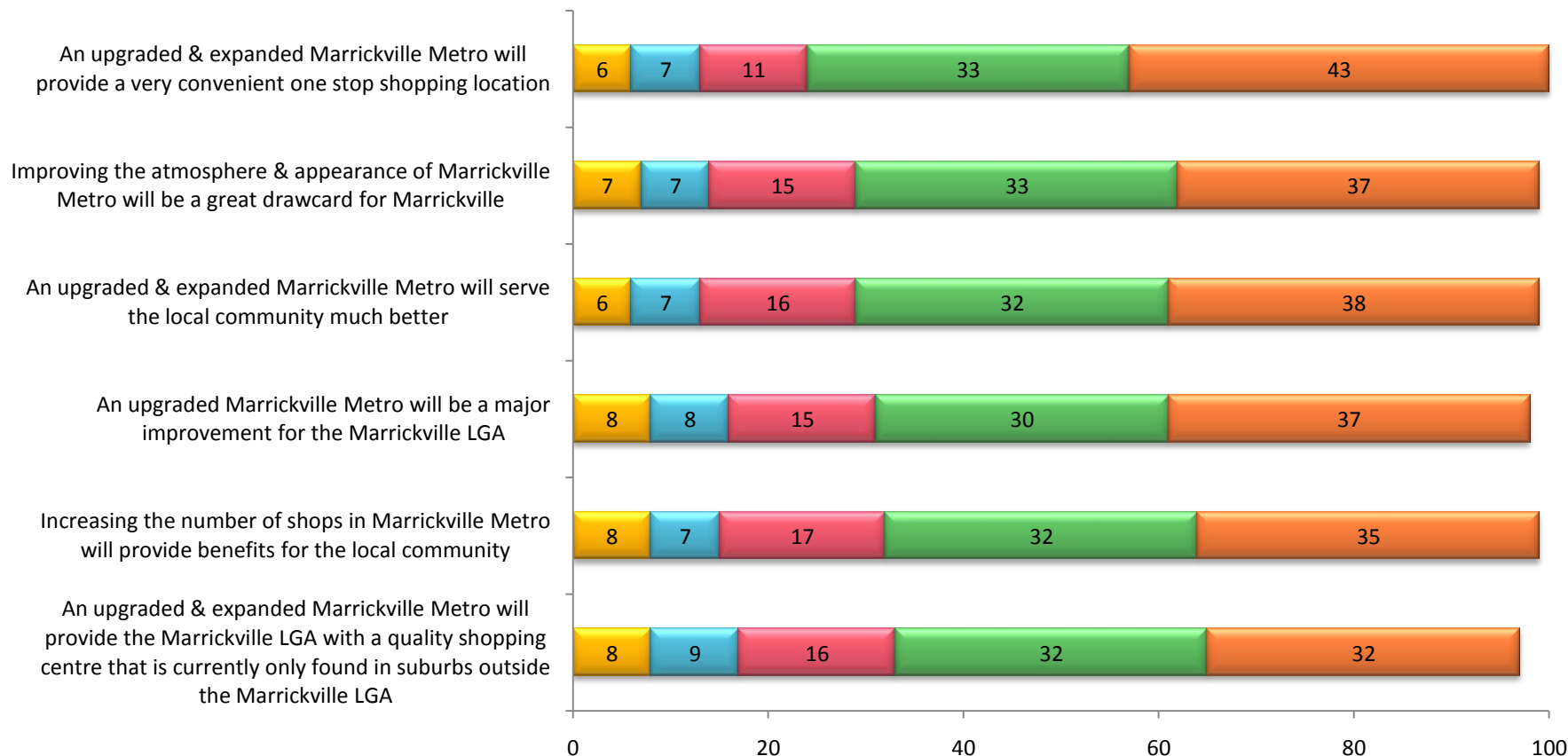
A very positive result overall

Totals may not add to exactly 100% as some respondents answered 'Don't know'

## Perceptions of the benefits associated with the expansion are correspondingly positive

How would you agree or disagree with the following statements people have made about the possible expansion of Marrickville Metro. Again, we are only interested in your opinions – it doesn't matter if you don't shop there very often at the moment.

Disagree strongly Disagree slightly Neither/nor Agree slightly Agree strongly

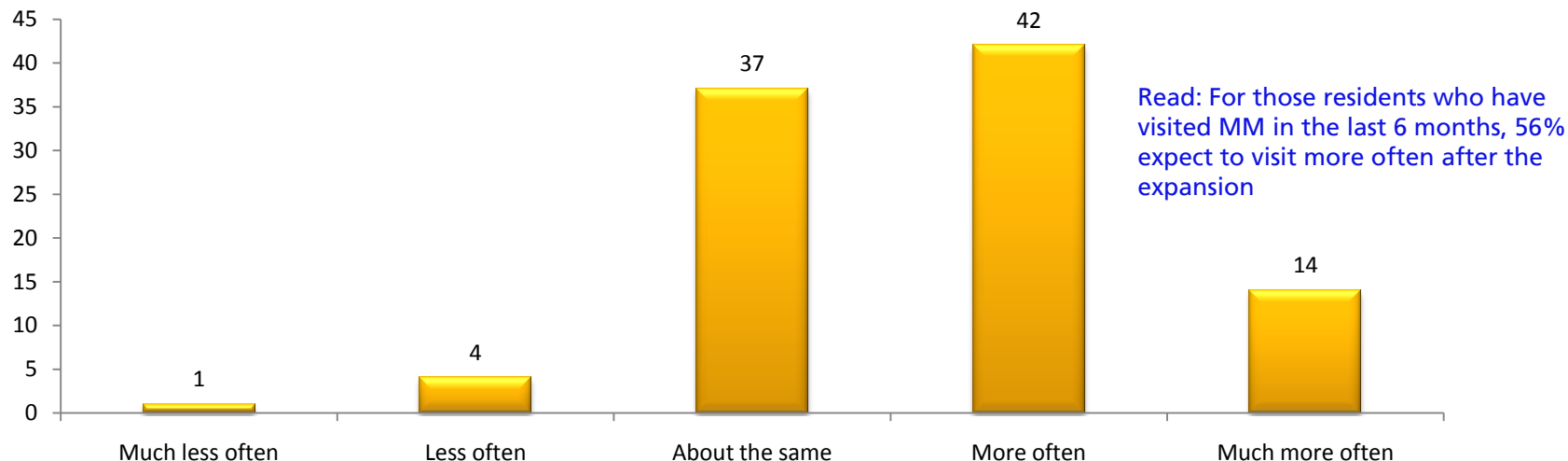


The expansion is seen as benefiting the community and the LGA generally

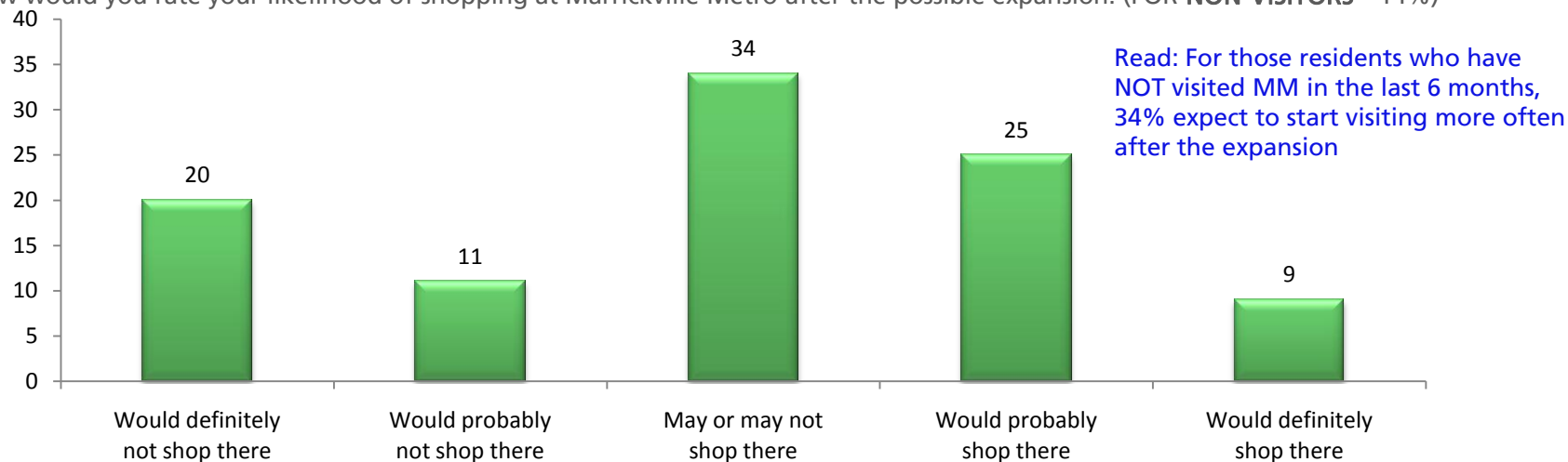
Totals may not add to exactly 100% as some respondents answered 'Don't know'

## More than half of existing Marrickville Metro visitors expect to visit more frequently, and a third of non-visitors expect to start shopping there

So thinking about how you might shop at Marrickville Metro after the possible expansion, would you say you'd shop there? (**VISITORS** – 86%)



So how would you rate your likelihood of shopping at Marrickville Metro after the possible expansion: (**FOR NON-VISITORS** – 14%)



Totals may not add to exactly 100% as some respondents answered 'Don't know'

uncoveringmarketsegments

## What makes a good segmentation? Some TBM guidelines

the segments are intuitive

the segments are very different

the 'right' number of segments

the segmentation is simple

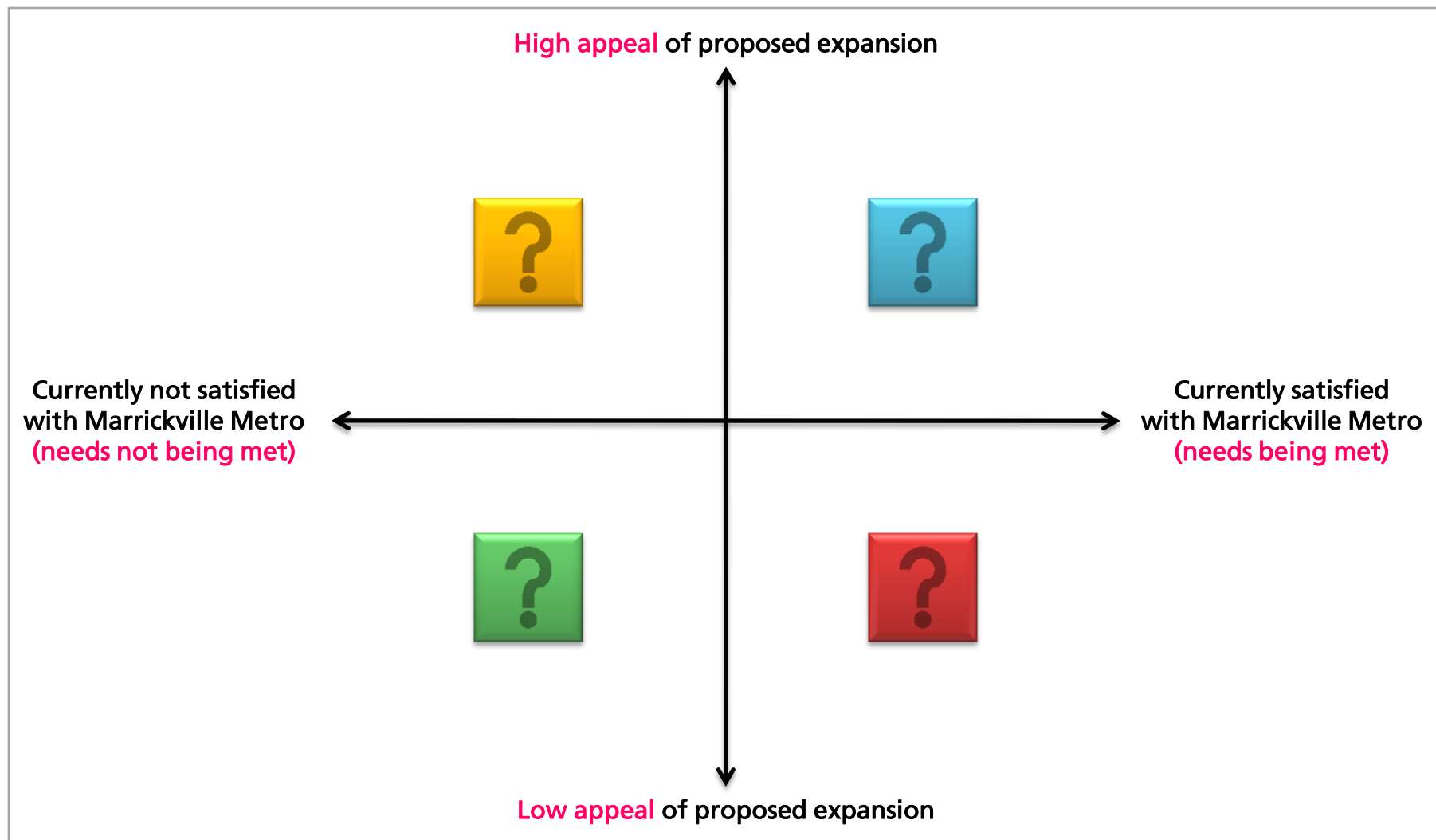
meaningful to our business

able to be actioned in the business

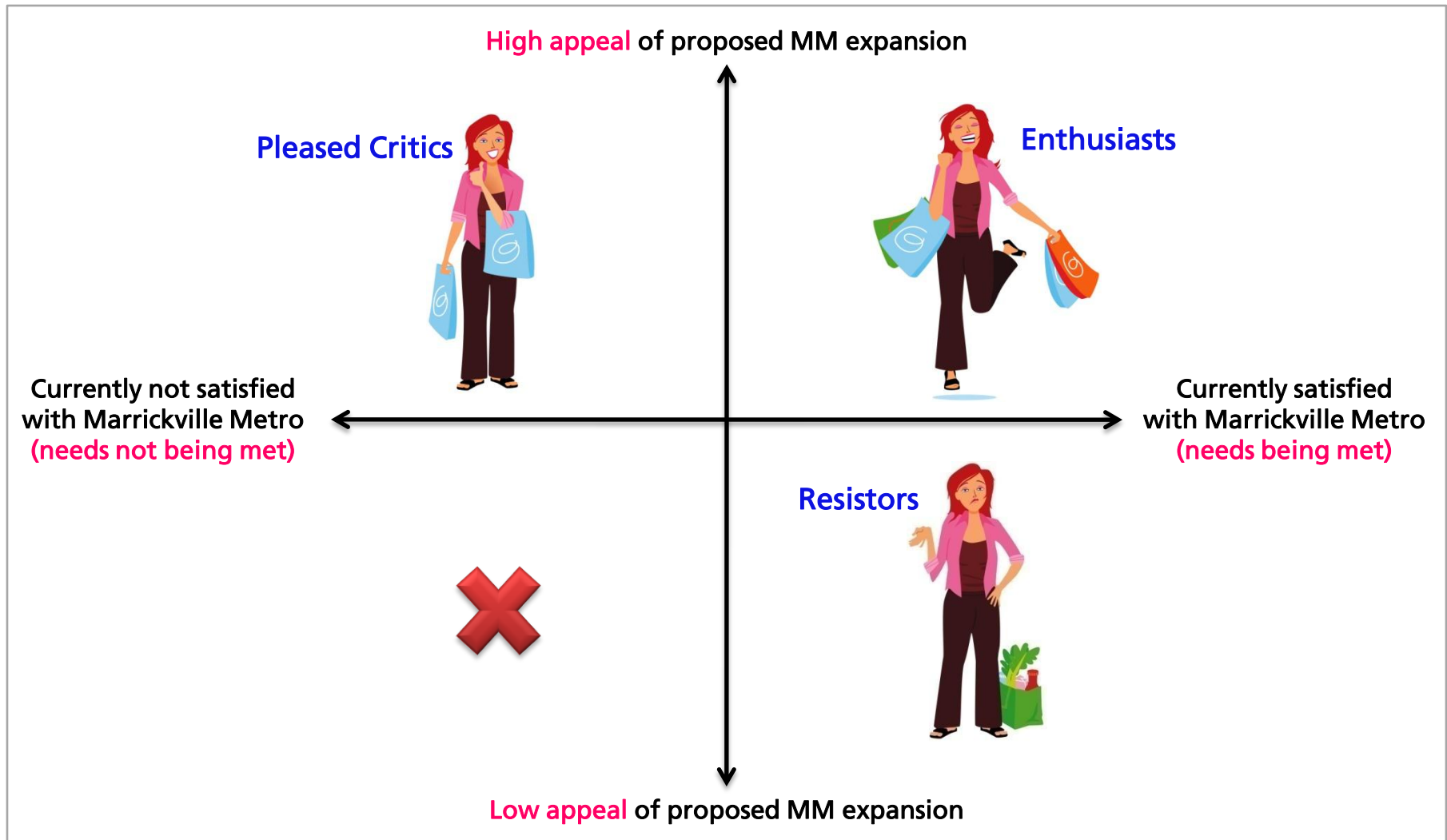
predictive of 'what matters'



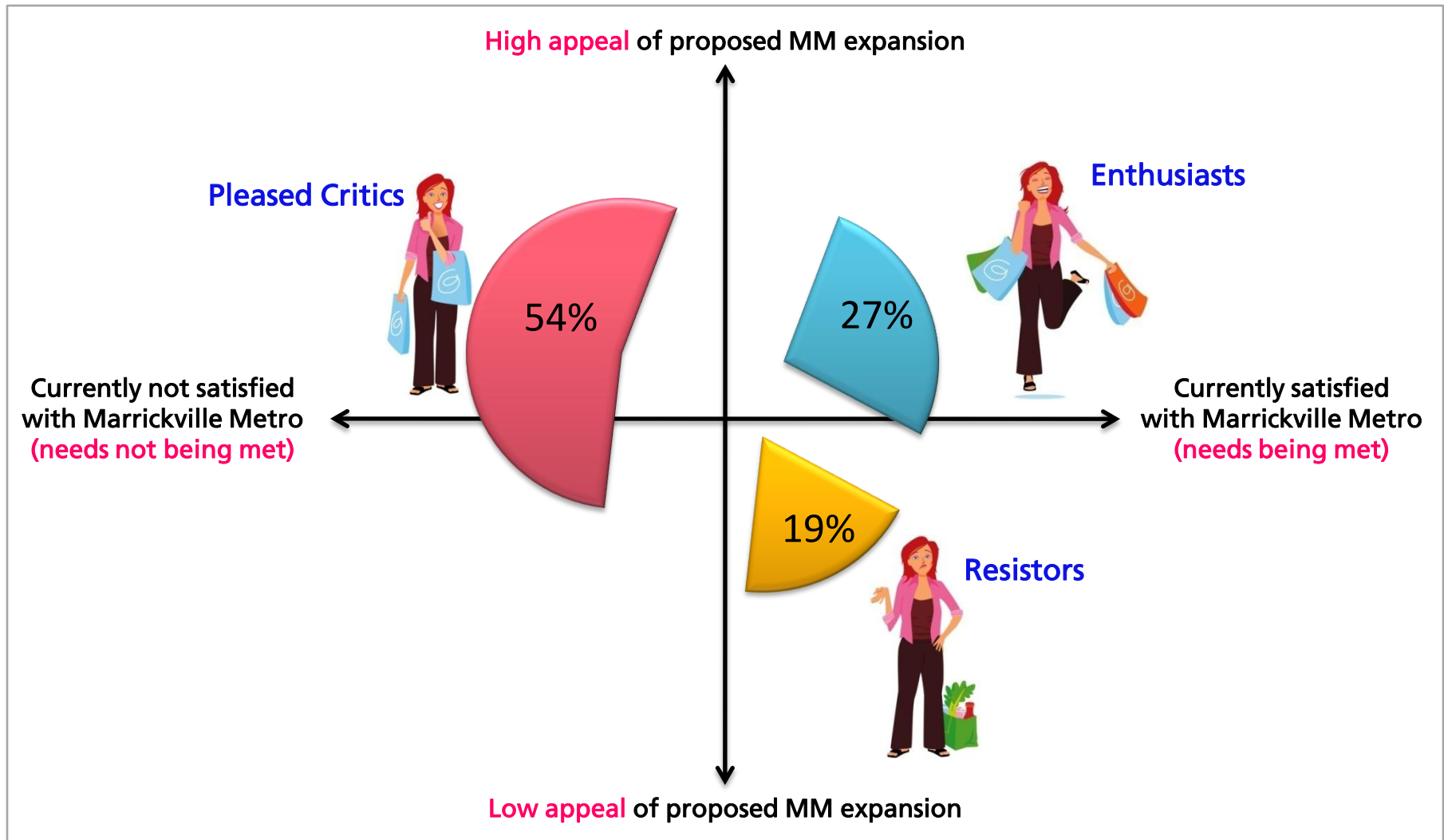
Our premise before we ran the segmentation was that residents would be divided on the basis of (a) their satisfaction with Marrickville Metro as it currently is; and (b) their response to the expansion



As it turns out, only three segments emerged from the data



As reflected in the aggregate data, the largely positive reaction to the expansion generates two optimistic segments & one more pessimistic segment



## Let's introduce our three segments



**Resistors**  
**19%**



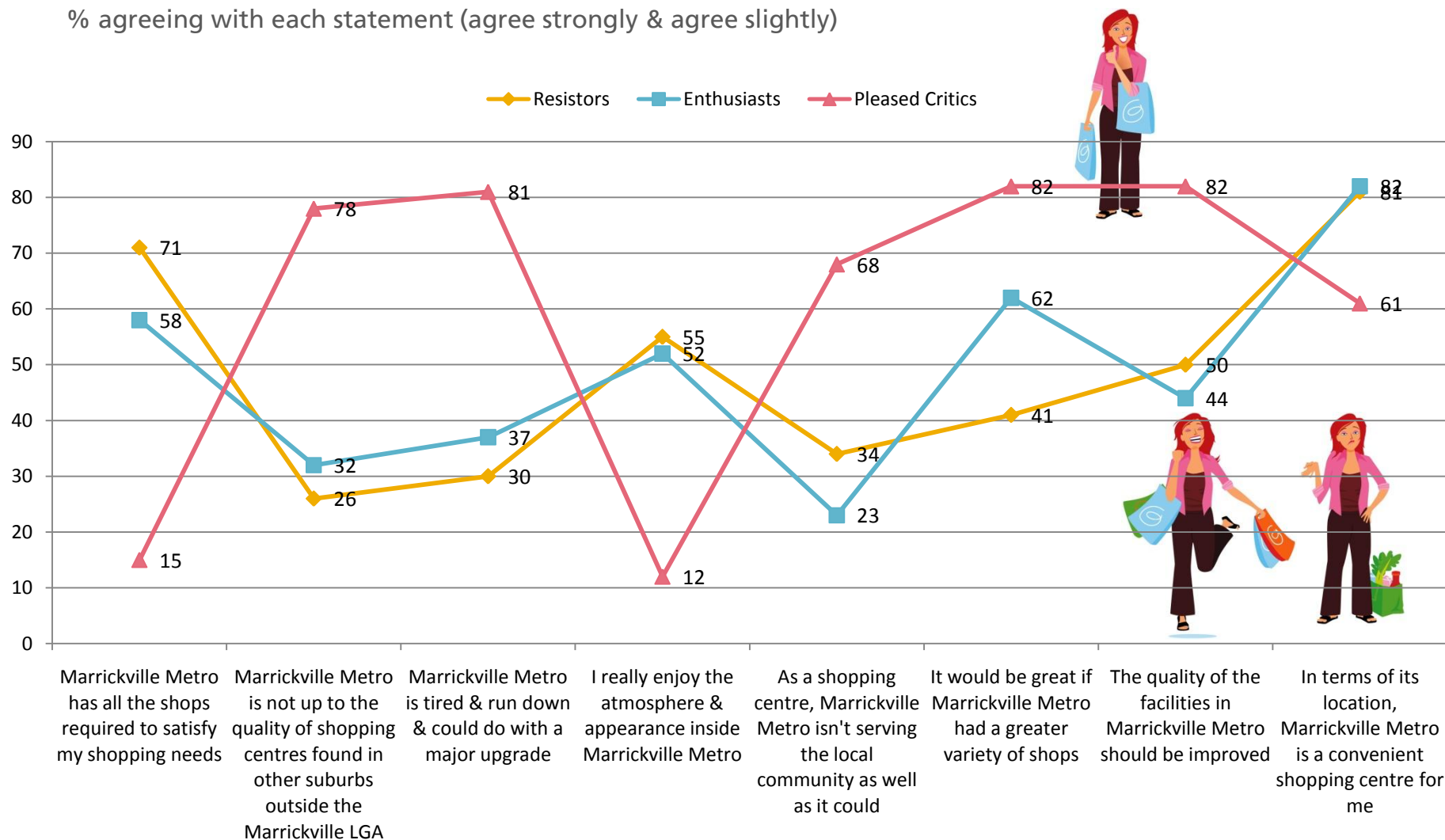
**Enthusiasts**  
**27%**



**Pleased Critics**  
**54%**

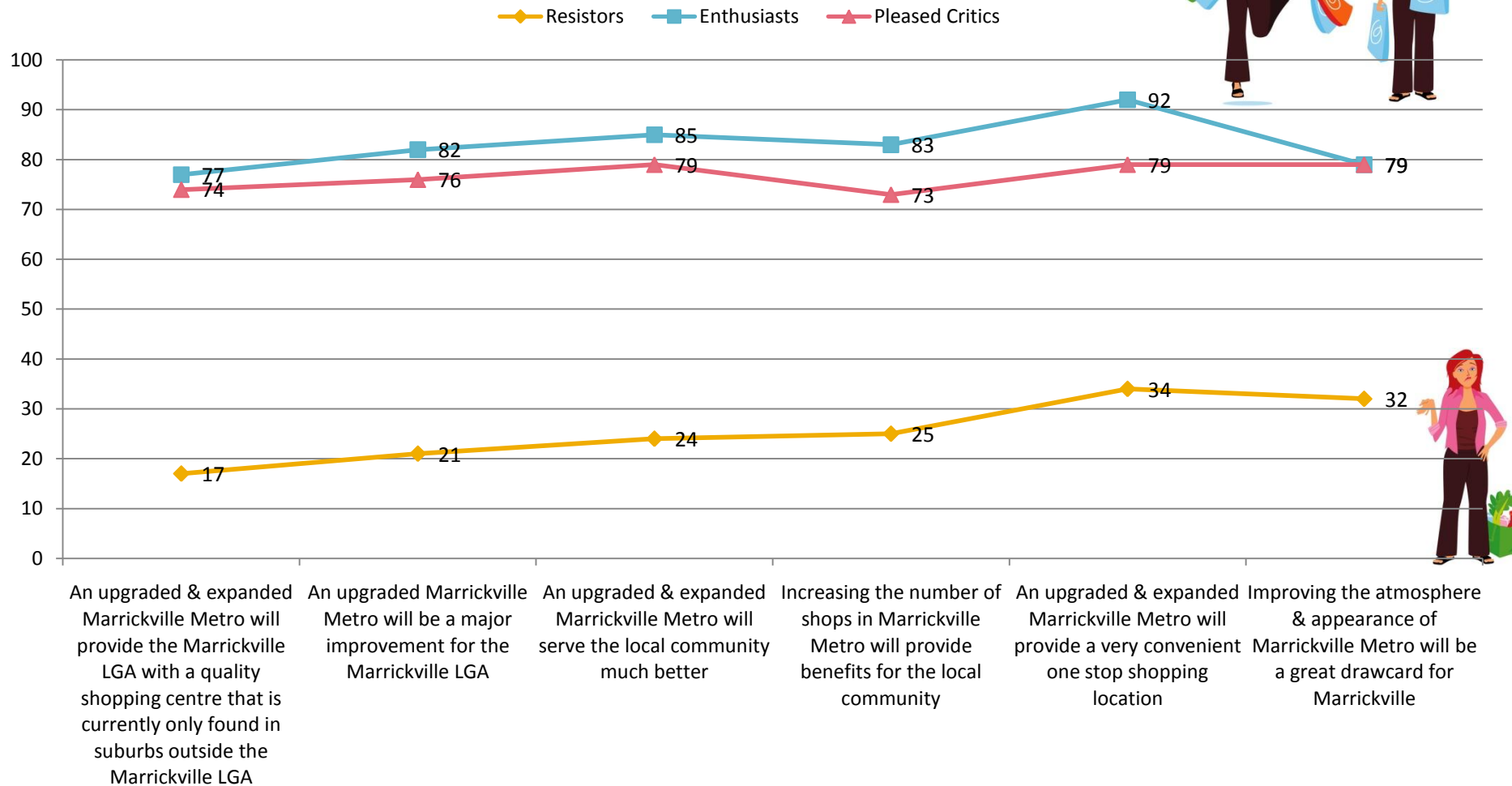
This chart shows how the segments perceive Marrickville Metro in its existing format. **The Resistors & Enthusiasts showing their 'loyalty' to the centre as it stands; whereas the Pleased Critics are very critical**

% agreeing with each statement (agree strongly & agree slightly)



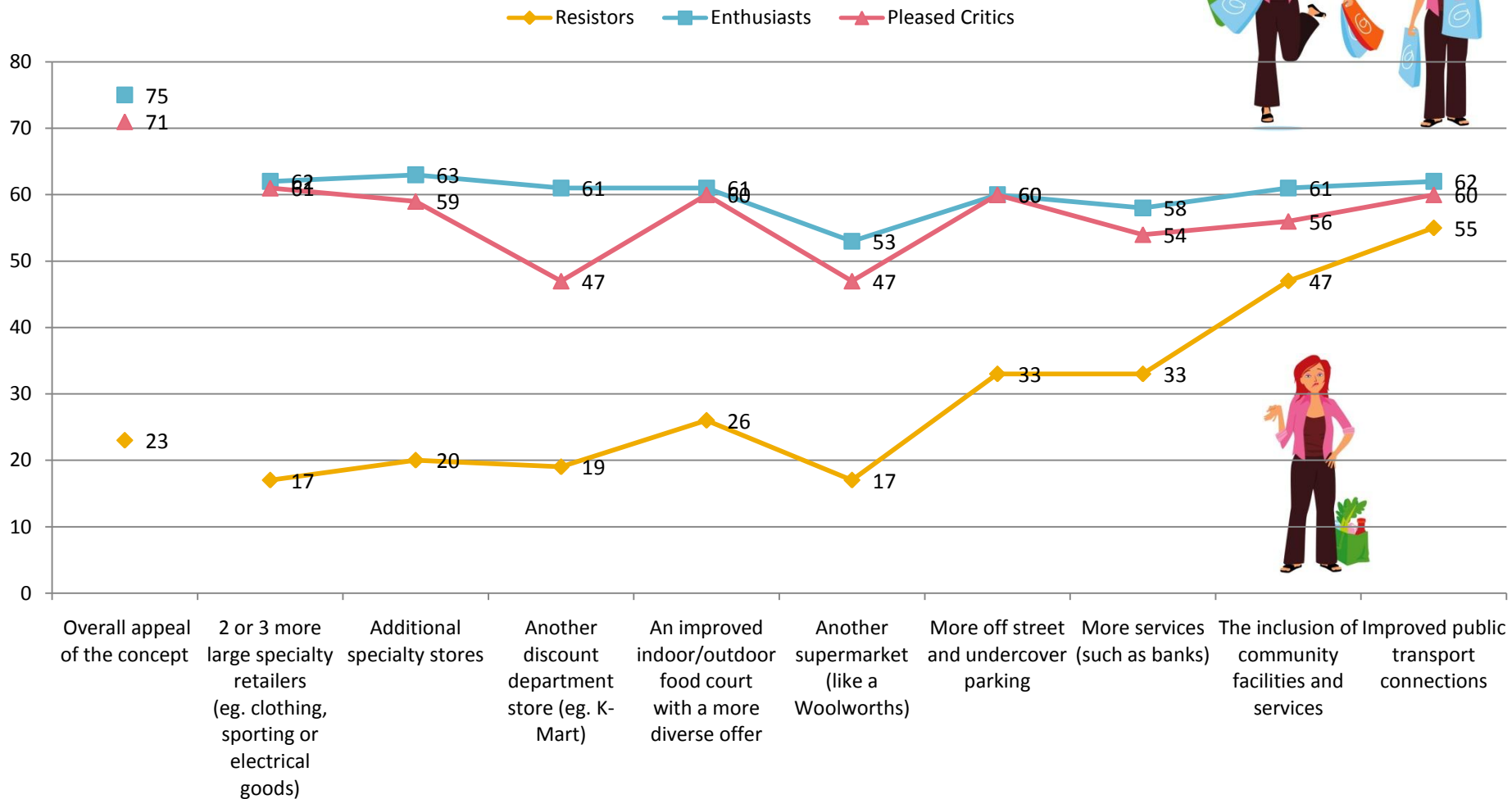
# This chart shows how the segments perceive the benefits of the expansion. **The Resistors showing very little enthusiasm for the expansion**

% agreeing with each statement (agree strongly & agree slightly)



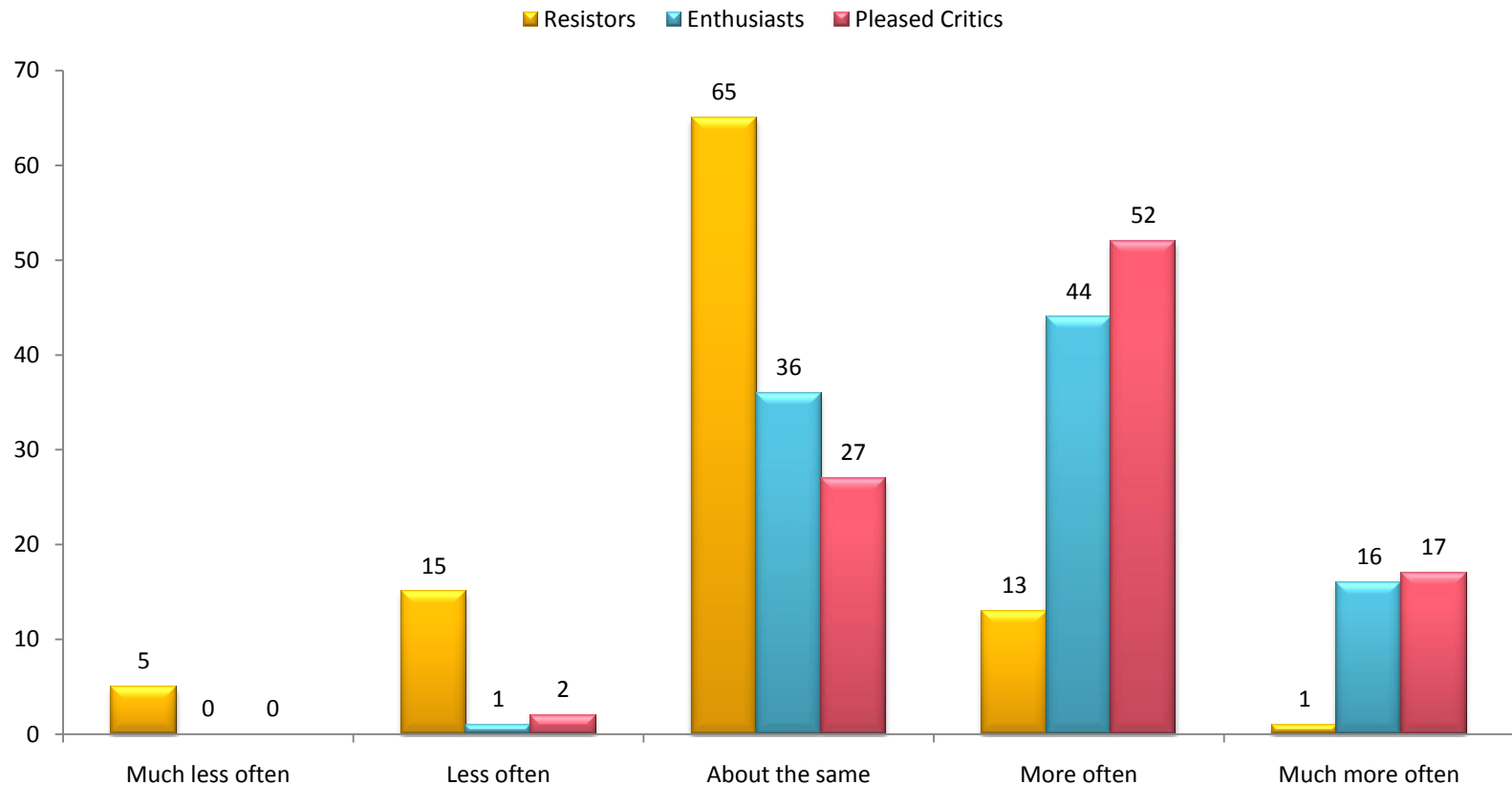
This question (appeal of the expansion & its elements) was not an input to the segmentation but clearly shows the sentiment of each segment. **The Enthusiasts the most upbeat about the expansion with the Pleased Critics close behind. The Resistors however, show very little appeal, other than the for the non-retail aspects**

% appeal of each element (extremely & very appealing)



## Anticipated visitation after the expansion is reflective of each segment's overall attitude

So thinking about how you might shop at Marrickville Metro after the possible expansion, would you say you'd shop there...?



Column1	Total	Resistors	Enthusiasts	Pleased Critics
Average no. visits to Marrickville Metro per month	5.2	↑ 6.3	↑ 5.9	↓ 4.4

Totals may not add to exactly 100% as some respondents answered 'Don't know'



# nextsteps



- Digest the results
- Broadcast the research results to a wider audience via TBM
  - AMP Capital Shopping Centres
  - other bodies
- Consider our information requirements moving forward, given the positive community response: -
  - segment-specific concept research (qualitative):
    - recruit focus groups for detailed concept research using AMP stimulus (drawings, impressions)
    - recruit residents on the basis of their segment - Resistors, Enthusiasts & Pleased Critics
    - make use of the 638 residents who want to be part of further research
    - delve into the nitty-gritty details & tease out the issues ahead of time
  - communications research (qualitative)

**two blind mice**  
two blind mice