

Marrickville Community Attitudes Research

Market research to understand the attitudes and expectations of Marrickville residents towards the retail offering in their area

Interim Findings of Research
AMP Capital Shopping Centres
March 2008

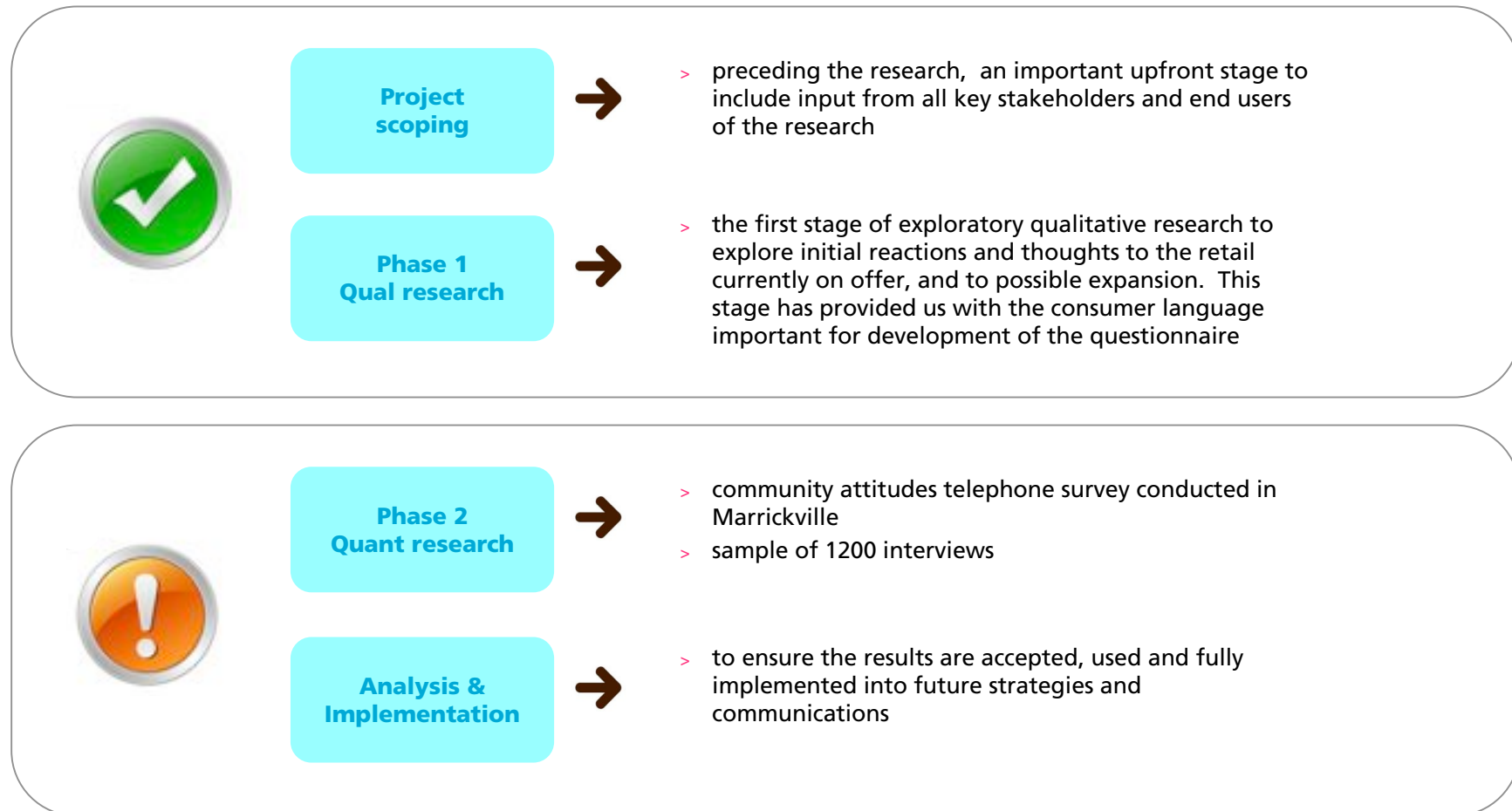
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Background



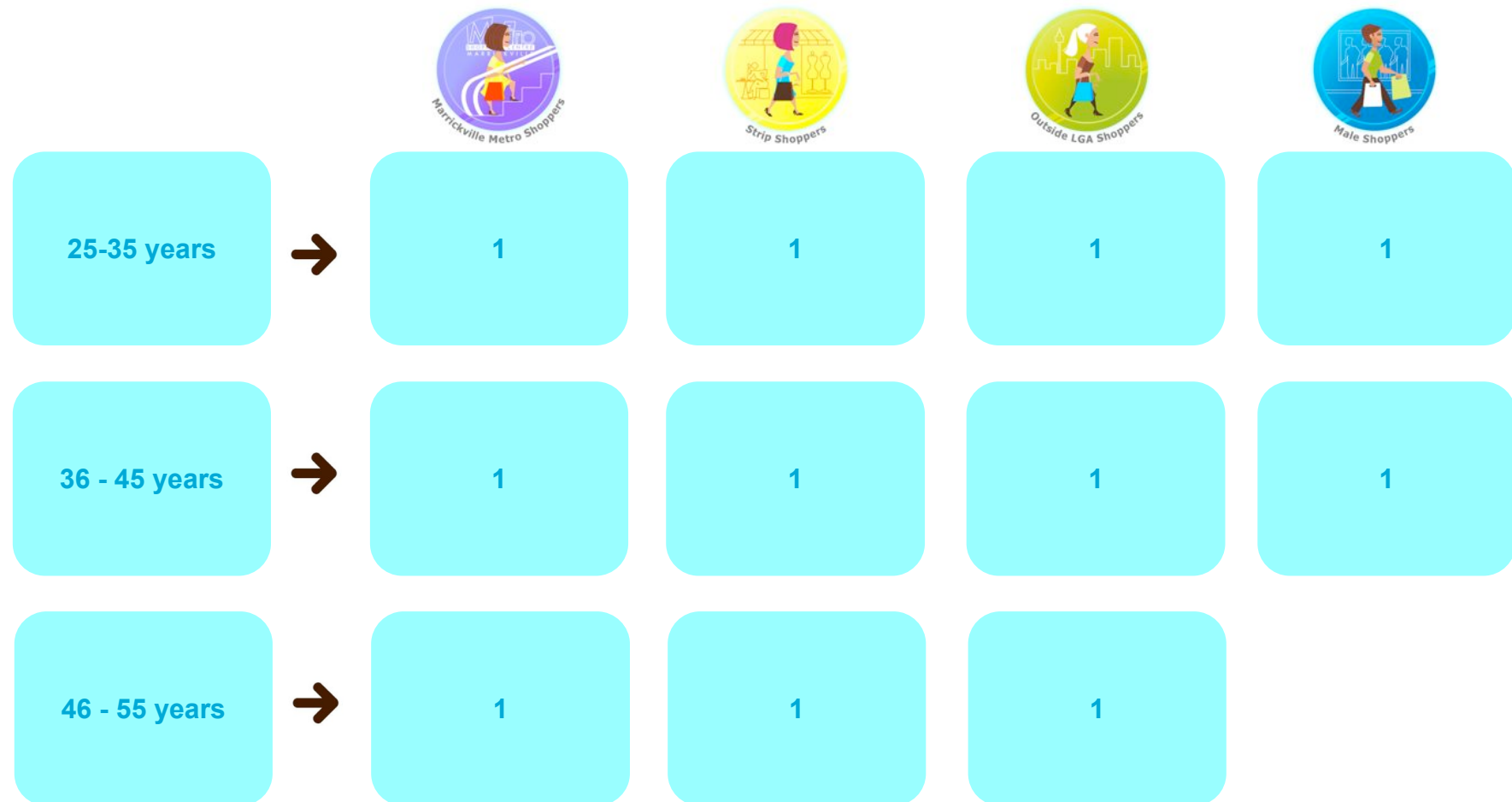
- > Marrickville Metro is a sub-regional shopping centre located in the inner south-western suburbs of Sydney, approximately 5kms south-west of the Sydney CBD
- > The retail component of the centre is provided over one level, with car parking provision of 1,100 spaces on the rooftop
- > The centre's 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 is **conducting research with Marrickville residents**
 - > Not just shoppers at our centre
 - > And not just those who don't visit our centre
 - > This is about gauging the entire community's attitudes - attitudes towards retail AND towards Marrickville Metro specifically
- > 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**
 - > Evolve and refine the development proposal
 - > Understand communications challenges - and prepare appropriate strategies
 - > Assist in discussions with council
- > This document is the interim presentation of findings from the first stage of qualitative research conducted

Research design



Phase 1 - qualitative research

- > For the first stage qualitative research, a total of **11 focus groups** with residents of the Marrickville LGA were conducted
- > This covered a range of segments as outlined below:



In-depth interviews

- > According to Census data, a high 40% of households in the area speak a language other than English at home (including Greek, Vietnamese, Chinese and Arabic)
- > A number of in-depth interviews with non-english speaking residents are to be conducted (not yet completed)



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- > Interviews conducted with **existing strip retailers** to discuss the issues at hand, and gauge their response to the possible expansion of Marrickville metro
- > 7 conducted in Marrickville/Illawara Road & 3 in King Street Newtown



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- > Interviews conducted with **existing Marrickville Metro centre retailers** - to discuss their views of the centre, the retail on offer in the LGA and to gauge their response to the possible expansion of Marrickville metro
- > Names provided by centre management



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detailedfindings

themarrickvillearea

A unique and exciting place to live!



- > These are people who love living in what they'll affectionately term 'the inner west'
- > They see the area as unique and different - with qualities that can't readily be found elsewhere in Sydney
- > Many will say that they simply couldn't see themselves living anywhere else
- > We had respondents from a wide range of the suburbs that make up the Marrickville LGA - and many of them had moved from suburb to suburb (but staying within the local area)
- > They've all seen a lot of changes over the years - and many had been 'moved out' because of the increasing expense and rising prices of homes and rentals
- > For example, many now living in actual Marrickville had previously lived in Newtown, Camperdown or Enmore

So many positives to living in Marrickville (LGA)



Location

- > Close to everything
- > Proximity to city
- > Close to lots of action
- > Concentrated area
- > Can walk everywhere
- > Good public transport links (trains & buses)



Vibrancy

- > Lively
- > Busy
- > Vibrant
- > 24 hour feel



Community

- > A sense of community
- > People know each other
- > Stop and talk to people
- > Friendly area
- > Tolerant area



Diversity

- > Very diverse / wide cross section of people
- > Ethnic diversity
- > Sexual diversity
- > Multi cultural

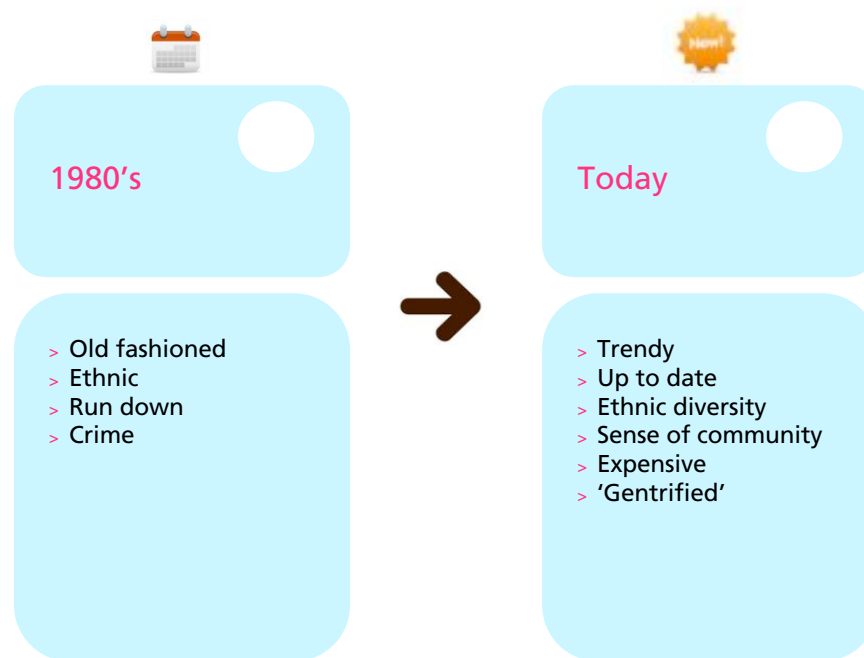


Lifestyle

- > Lifestyle
- > Cafes / food / shopping
- > Cultural food experiences

Important implications for what types of developments (and changes to the area) are deemed suitable - need to be in keeping with these key characteristics

The area has seen many changes...and continues to change



As we'll see, many feel Marrickville Metro in particular has not kept pace with this change

Some reflections on their area...

"There's a sense of community here that is quite unique to the inner west, I don't think other people in Sydney get that same feeling"

"It's the combination of all sorts of different people that really makes the area work"



"It's the diversity around here that really attracts me. That's what I love about the area"

"I've always lived in the inner west because it suits me and my lifestyle. I can't imagine living anywhere else in Sydney"

"I've had to keep moving because it's got more and more expensive. When I first moved here, it was cheap, but not anymore. It's become trendy and so people with money are moving in"



"I've seen a lot of changes over the years. It used to be all Italians and Greeks on my street, now there are a lot of Vietnamese and younger families seem to be moving back in too with their kids"

**shoppinginthe
marrickvillearea**

A wide range of options...but spread out



- > On the whole, at the moment, most residents felt that there was a wide variety of shopping available to them in the area
- > This ranged from grocery shopping, to specialised cuisines, homewares and gift shopping and (to a lesser extent) clothing
- > Generally, there is strong support for shopping close to home and supporting local retailers
- > Reasons include:
 - > Encouraging local employment
 - > Supporting the sense of community (knowing people at the local shops is important for most people)
 - > Convenience (a big factor)
 - > Cheaper prices
- > However, the key problem is the **fragmentation of shopping**
- > Many residents find themselves having to shop in multiple locations to cover all their needs
- > There is no 'one stop shop' for residents, who frequently cite a number of different locations that they visit on a regular (weekly) basis

A key opportunity exists for a more 'complete' shopping experience

A fragmented shopping environment...

"We spread our shopping out because we don't have one bigger central place to go"

"There are lots of little places near us, and you have to go from one to the next to get all your things done"



"I'm constantly in the car driving here or driving there just to do the basics. Nowhere has it all"

"There are plenty of shops that I like that I have to leave the area for"

"You've got to go to different places for different things"

"The shopping options around here are all quite specific, that's the problem. They're different for different occasions"



"If you want clothes you go to one place, if you want food it's another. It becomes quite annoying"

"There's no one convenient place you can just get it all. I spend my time driving from one to the other"

And transport is a major problem!

- > One of the most interesting observations for us was that many of those living in the Marrickville area did NOT own (or have access to) a car (something we'll need to measure in the survey!)
- > It was typically the more recent resident (younger families with children) who were more likely to have cars
- > However, for those without cars, there are some implications that impact their shopping behaviours



- > Live in the inner west
- > Choose not to have cars
- > Don't need them
- > Don't want them
- > (or can't afford them)
- > Walk
- > Rely on public transport
- > Difficult to carry much
- > Have to do smaller shops more often
- > Regularly stop off along the transport route (rather than arrive at a destination to shop)

For those with or without cars, fragmented shopping is not ideal

Mapping the shopping destinations

- > When asking respondents about the shopping destinations available to them, a wide range were mentioned
- > Reflecting the fragmentation of shopping options in the area, most had been to (and could comment) on each of these different shopping destinations
- > And, in fact, many visit each of them (or at least quite a few of them) regularly
- > In mapping these shopping destinations, there were some interesting differences in the way 'strip shoppers' and centre shoppers perceived these different shopping options

Shopping destinations

- > Broadway
- > King Street, Newtown
- > Leichhardt Marketplace
- > Norton Street Leichhardt
- > Enmore Road
- > Illawara Road
- > Marrickville Road
- > Marrickville Metro
- > Westfield Burwood
- > Westfield Eastgardens
- > Westfield Bondi Junction
- > Ashfield Mall
- > Paddy's Market
- > Sydney city (CBD)



Mapping the shopping destinations

- > Strip shoppers were more likely to group all the 'under one roof' centres together

- > Broadway
- > Leichhardt Marketplace
- > Marrickville Metro
- > Westfield Burwood
- > Westfield Eastgardens
- > Westfield Bondi Junction
- > Ashfield Mall
- > Paddy's Market
- > Sydney city (CBD)

- > King Street, Newtown
- > Norton Street Leichhardt

- > Enmore Road
- > Illawara Road
- > Marrickville Road

- > Have department stores
- > One stop shops
- > Have everything under one roof
- > Visit once in a while
- > A day out

- > Boring
- > Homogenous
- > Bland
- > Impersonal
- > Too big

- > Trendy
- > Highly developed
- > Dining out
- > Cafes & restaurants
- > Nightlife
- > One off stores
- > Unique stores
- > Lots of variety
- > Wander up and down
- > Not ideal for groceries

- > Community based
- > Food stores
- > Much cheaper produce (butchers & greengrocers)
- > Vietnamese stores/bakeries
- > Asian food focus
- > \$2 stores
- > Convenient (walking)
- > Not done up
- > Run down
- > Parking a nightmare
- > Daggy
- > Downmarket
- > No nightlife



Mapping the shopping destinations

- > Centre shoppers were more discerning and saw greater differences between the centres

- > **Broadway**
- > Westfield Burwood
- > Westfield Eastgardens
- > Westfield Bondi Junction
- > Ashfield Mall
- > Sydney city (CBD)

- > King Street, Newtown
- > Norton Street Leichhardt

- > Enmore Road
- > Illawara Road
- > Marrickville Road

- > **Leichhardt Marketplace**
- > **Marrickville Metro**
- > **Paddy's Market**

- > Have department stores
- > One stop shops
- > Have everything under one roof / variety
- > Visit once in a while
- > A day out
- > **Fun shopping**
- > **Leisure shopping**

- > Trendy
- > Highly developed
- > Dining out
- > Cafes & restaurants
- > Nightlife
- > One off stores
- > Unique stores
- > Lots of variety
- > Wander up and down

- > Community based
- > Food stores
- > Much cheaper produce (butchers & greengrocers)
- > Vietnamese stores/bakeries
- > Asian food focus
- > \$2 stores
- > Convenient (walking)

- > Smaller
- > Easy to navigate
- > Easier to park
- > Grocery shopping
- > Functional shopping
- > Convenient
- > (Paddys: outlet stores & farmers market)

- > Homogenous
- > Bland
- > Impersonal
- > **Takes time / not quick**

- > Not ideal for groceries

- > Not done up
- > Run down
- > Parking a nightmare
- > Daggy
- > Downmarket
- > No nightlife

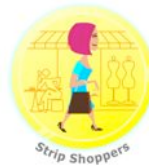
- > Only food, nothing else

Interesting segment differences

- > There were some interesting similarities and differences between the segments interviewed
- > One of the key similarities was the very prominent focus on costs - and low cost shopping (particularly grocery shopping)
- > Some of the key differences included:



- > More likely to have a car
- > Looking for convenience
- > Easy parking
- > Easy shopping
- > Want to be in and out
- > Not spending time wandering around shops
- > Never really mentioned browsing
- > Usually have children



- > Like the strip shopping experience
- > Work inside all week - like to be outside
- > More convenient to buy fewer items more often
- > Walk to shops
- > Don't own a car
- > Like coming across something unusual
- > Like uniqueness (don't like chain stores)
- > More adventurous
- > When shopping at a centre - want the big centre experience
- > (Marrickville Metro too in-between for them at present)
- > Younger
- > Fewer with children



- > Shop closest to work
- > Or at a location on public transport on the way home
- > Like bigger shopping centres, and visit on weekends for leisure

A lot of talk about Broadway

- > One of the surprising aspects in discussing shopping destinations was the prominence of Broadway as a key centre for many
- > Broadway seems to strike a nice balance between being a manageable size with a wider variety of stores
- > It also provides all important parking, and for those without cars, was frequently mentioned as the EASIEST destination in terms of public transport links



- > 'Midsize' / good size
- > Easier bus route connections
- > New stores (new level)
- > Clothes stores
- > More variety
- > Close / convenient
- > Parking
- > Better K-Mart
- > Target
- > Entertainment options (cinema)



"It's easier to get the bus to Broadway, especially if you're carrying groceries or heavy things"

"Coming from the city, it's just easy to stop at Broadway, do your shopping, then carry on home"

"I get everything at Broadway that I can't get on Marrickville Road because the transport is much easier without a car"



shoppingatmarrickville
metrotoday

Some polarising attitudes towards Marrickville Metro

- > Discussion about the current experience offered by Marrickville Metro polarises the local community
- > There are those that support the centre on the basis of being an 'old and comfy' friend - a no frills, unglamorous and purely functional centre (which suits some people)
- > But there are far more who feel the centre is run down, outdated and performing well under its potential - and not serving the local community well

"For me, it's just a functional centre. You want to get in and get out again"

"Marrickville Metro has such a budget feel about it. To me, it's that kind of shopping centre"

"It really needs a revamp!"

"It feels dark and unsafe at night. I know it's open late, but I wouldn't venture there at night"

"It's good to race in and do what you have to, but I wouldn't sit around and have coffee or anything there"

"It's not the sort of place you'd organise to meet a friend. King Street or Marrickville Road is much better for that"

"It's easy to park, but you have to fight for the shade. There's not a lot of undercover parking"

"You don't have to spend long there, you can be in and out pretty quickly"

"To me, it's on a more human scale. It's only one level and it's easy to get around it"

"The good thing about the Metro is that it has banks and the RTA and stuff so you can do things like that there"

"It really could be a much better shopping experience, it's a shame something isn't done about it"

"It's closer for me, but I just find Broadway nicer, so I go there"



Plenty of positives for Marrickville Metro



- > Convenient
 - > Close to home
 - > Easy to get to
 - > Can walk / in walking distance from home
 - > Can be in and out quickly
- > Food offer
 - > Can get all your food needs in one go
 - > Good quality foods
 - > Huge grocery variety / range
- > Good value centre
 - > Prices are good
 - > Good value
 - > Cheap food / bargains
- > One level
 - > Can't get lost
 - > Not too big
- > Familiar
 - > Know way around
 - > Favourite shops / routine
- > Free parking
 - > Ample parking
- > Feel safe
 - > No youths / gangs hanging around
- > Relaxed
 - > 'Not tizzy'
- > Aldi
- > Woolworths (big & open late)
- > K-Mart (a neat K-Mart)
- > House
- > RTA
- > Banks
- > Post office
- > ATMs

Important elements to endeavour to maintain in any expansion

Weaknesses of the centre



- > Ambiance
 - > Daggy / ugly / depressing
 - > Gloomy / dark (no natural light)
 - > Bunker like / inward focused
 - > Low ceilings
 - > Noisy
 - > No focal point
 - > Tired / dated / old
- > Layout
 - > Confusing
 - > Congested
- > Lack of variety
 - > Not a browsing experience
 - > Boring
 - > Old fashioned clothing stores
 - > Unappealing shops
- > Location / access
 - > Awkward location
 - > Tucked away
 - > Poor signage
- > Public transport
 - > Bad/difficult connections
 - > Few taxis
- > Food hall
 - > Bad food / few healthy options
 - > Cramped
 - > In a main thoroughfare
 - > Dark
- > Lack of undercover parking
- > Shops close too early
- > Toilets
 - > Messy / unclean
 - > Not private (doors too high up)
- > No home delivery service available
- > Trolleys
 - > All over the carpark
 - > All through the centre
 - > Being pushed everywhere
- > Smokers hanging around the entry
- > Lift to carpark
 - > Slow and old
- > A small K-Mart
- > No decent bookshop
- > No good clothing stores
- > No health food / organic store
- > No department store
- > No Target
- > Need more good cafes
- > No children's play areas

Important elements to address - both short term and in any expansion

Location & transport is a key issue for Marrickville Metro

- > One of the key surprises in the non shopper groups was the extent to which they felt Marrickville Metro was difficult to get to
- > Transport links are considered a key issue - particularly access via public transport
- > And many had stories about helping strangers or fielding questions to solve the puzzle of where Marrickville Metro actually is

“

“Marrickville Metro is hard to get to. There’s the bus, but then you have to walk across the park. I’d rather go to Broadway where the bus drops you right off”

“I always get people asking me where it is”

“I think it’s the 355 you can take, but it takes forever. It must stop at every stop in Sydney before getting there”

“I was at the petrol station the other day and someone asked me where on earth Marrickville Metro was”

“Unless you live right on top of it, you wouldn’t know where it was would you”

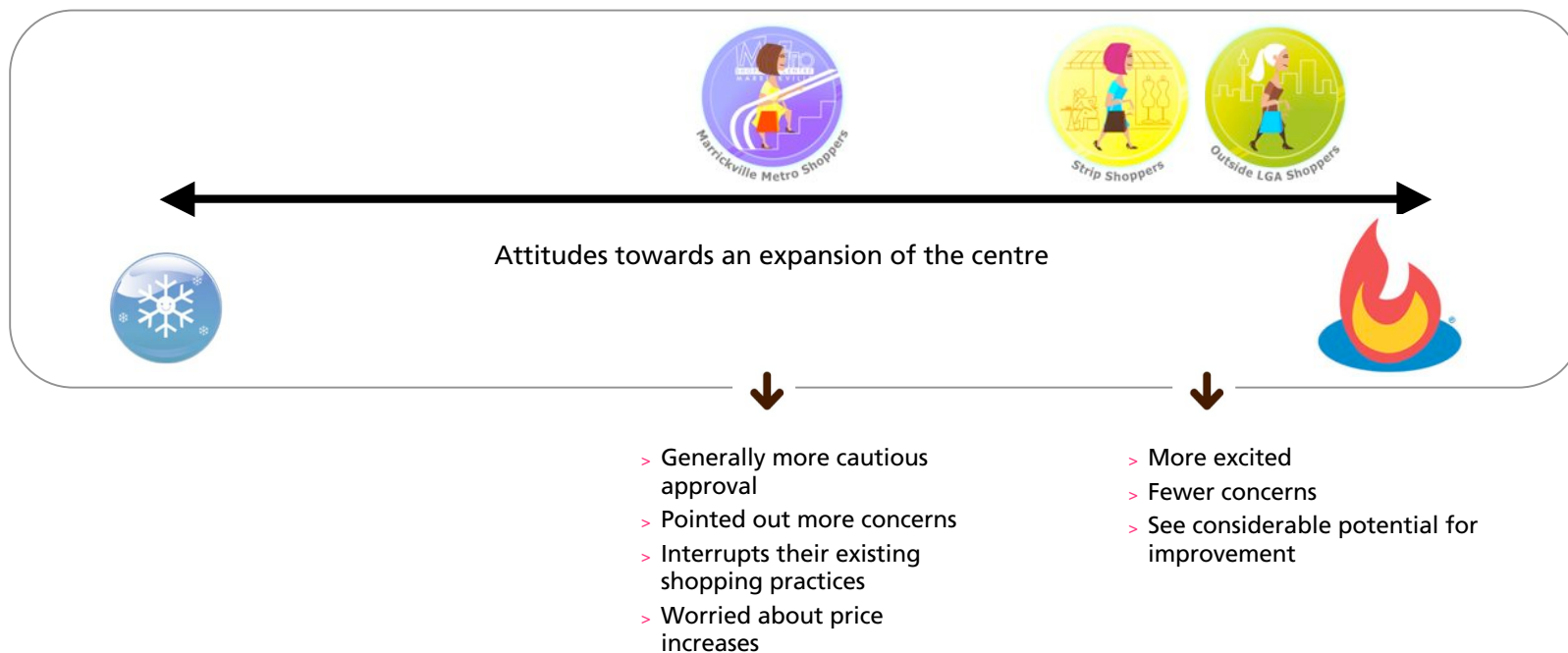
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An issue to look at addressing asap - can transport links and signage be improved?

**attitudestowardsthe
expansionofmarrickvillemetro**

An overwhelmingly positive response to the concept of expansion

- > On the whole, the reaction to the idea of expanding Marrickville Metro was very positive
- > However, there were certainly differences in reaction between the segments included in the research
- > If anything, existing shoppers were a little more weary of an expansion (although still in broad support)
- > They are more used to the centre, more likely to overlook its weaknesses (including ambiance) and more worried about price rises as a result of changes to the centre
- > However, current non shoppers (those who don't visit the centre regularly) were somewhat more positive towards an expansion - open to the idea of a new and more appealing local shopping destination



A positive response to an expansion



How I would feel about
Marrickville Metro after an
expansion of the centre...



- > Curious
- > Happy if limited expansion
- > With quality shops, would visit more often
- > Better food court would be great
- > Could spend more time there



- > Not too big / don't want it too large / too cumbersome
- > Wouldn't want more of just the same daggy shops
- > Don't want it to get too busy
- > Worried about traffic and impact on local area
- > Weary about increases in prices
- > Don't want it to be plastic / bland
- > Don't want a Westfield

A positive response to an expansion



**How I would feel about
Marrickville Metro after an
expansion of the centre...**



- > Positive
- > Excited
- > Hopeful
- > Enjoy a new atmosphere
- > Enjoy more options
- > Would visit there
- > Would visit more often
- > Would spend more time there
- > Would eat there with an improved food court / café options



- > Not too big / don't want it too large / too cumbersome
- > Wouldn't want more of just the same daggy shops
- > More parking would have to be provided
- > Don't want a Westfield

A positive response to an expansion



How I would feel about
Marrickville Metro after an
expansion of the centre...



- > Excited
- > Interested
- > Would visit it
- > Would go out of my way to get there
- > Would visit more often
- > Spend a day shopping there
- > Good café options will draw me in
- > Healthy food would be attractive
- > Would go and check it out



- > Public transport links would have to improve
- > Depends how an expansion is handled
- > Don't want a Westfield

Some reflections on an expansion to the centre...

"If there was another level of shopping, it would stop me having to go to four or five places for all my shopping. That would be great"

"When I park by the pet shop, I always wonder why that timber cottage isn't used as a lovely café. Little kids could play on the grass while us mum's have a coffee"



"I certainly think the area needs something more somewhere, and Marrickville Metro seems a perfectly reasonable place for it"

"There's so much opportunity to make it better with more shops and more variety. It could be a place to spend the day"

"Two levels would be fine, and you could put new stores upstairs away from the more functional grocery shops that are already there"

"If you could find shops that we like and are different and then put them all under one roof, well, that would be great"

"I think most people would appreciate finally being able to get everything in the one place"

"It's important for the area that the centre is upgraded. It's so run down, it's quite embarrassing. New people are moving into the area, and they want more"

"Everybody is so busy these days, it's all about convenience. Put everything in the one place, and I'm sure they'll all flock there"

"It sounds great! Tell me it's going to happen soon?!"



But residents have a very clear picture of what they don't want an expanded centre to be like

- > The idea that Marrickville Metro could (or would) be turned into a 'Westfield' puts everybody off the idea of expansion
- > Interestingly, many would use the phrase 'we don't want a Westfield' - as a catch all statement against bland, chain store focused shopping centres that all look the same, feel the same and have the same retail offering
- > They are proud of their unique difference, the diversity of the area and the multicultural aspects that are part of living in and around these suburbs
- > Their wish, and a key opportunity to maximise the potential of the centre, is to have that diversity reflected in the mix of a new Marrickville Metro

"Westfields are sterile and it's not a sterile area. That wouldn't fit in with what Marrickville is all about"

”

"I think it's great, and it really needs it, but I think that it should reflect the diversity of the area and the different cultures that are around"

“

"People like the area and choose to live here because of the diversity so ideally you'd want to retain that in a bigger and better Marrickville Metro"

"You don't want it bland and big and the same as all the Westfields around. There's nothing unique about that. Why not think outside the box a bit and do something different"

"If it was expanded in the right way, that is, the shops and cafes were unique and funky and multi-cultural, then all of Marrickville's charms would come out and it would be a fantastic addition to the area"

**stores that are missing
from the marrickville area**

Desired stores for the Marrickville area

Bigger stores

- > Department stores
 - > David Jones
 - > Myer
- > Harris Farm
- > Target
- > Big W
- > IKEA
- > Bunnings

Categories

- > Specialist bakery/cake store
- > Specialist wine stores
- > DVD hire stores
- > Nursery
- > Bookshops
- > Discount chemist
- > Homewares
- > Gift stores
- > Hardware
- > Shoe shops
- > Organic food shops
- > Health food shops
- > Clothing
 - > Local designer clothing
 - > Plus/large size clothing
- > Factory outlets
- > Farmers markets
- > Music stores
- > Art supplies
- > Computer equip
- > Kids clothing

Named stores

- > EB Games
- > Dan Murphys
- > Price Attack
- > Priceline
- > Colorado
- > Sussan
- > Spotlight
- > Lush
- > Howard's Storage
- > JB Hi-Fi
- > Dymocks
- > Borders
- > GNC
- > Chemist Warehouse
- > Ezy DVD
- > Baby Co
- > Sanity
- > Toys'R'Us
- > Go Lo
- > Macro

Services

- > Medicare
- > MBF
- > Commonwealth Bank
- > Gym
- > (Fitness First)

Desired stores for the Marrickville area

Food & drink

- > Healthy restaurants
- > Vegetarian restaurants
- > Outdoor cafes
- > Alfresco dining

Entertainment

- > Cinemas
- > Live music venue
- > Nightlife

Community

- > Child care
- > After school facilities
- > Community gardens

retailers

Some thoughts from retailers...



- > No focus on (or consideration of) Marrickville Metro
- > Not in 'competitive set'
- > Surviving day to day on their strips
- > Concerned about local foot traffic
- > See Marrickville Metro as a different experience
- > Have their loyal customers
- > Any expansion of centre not really on their radar

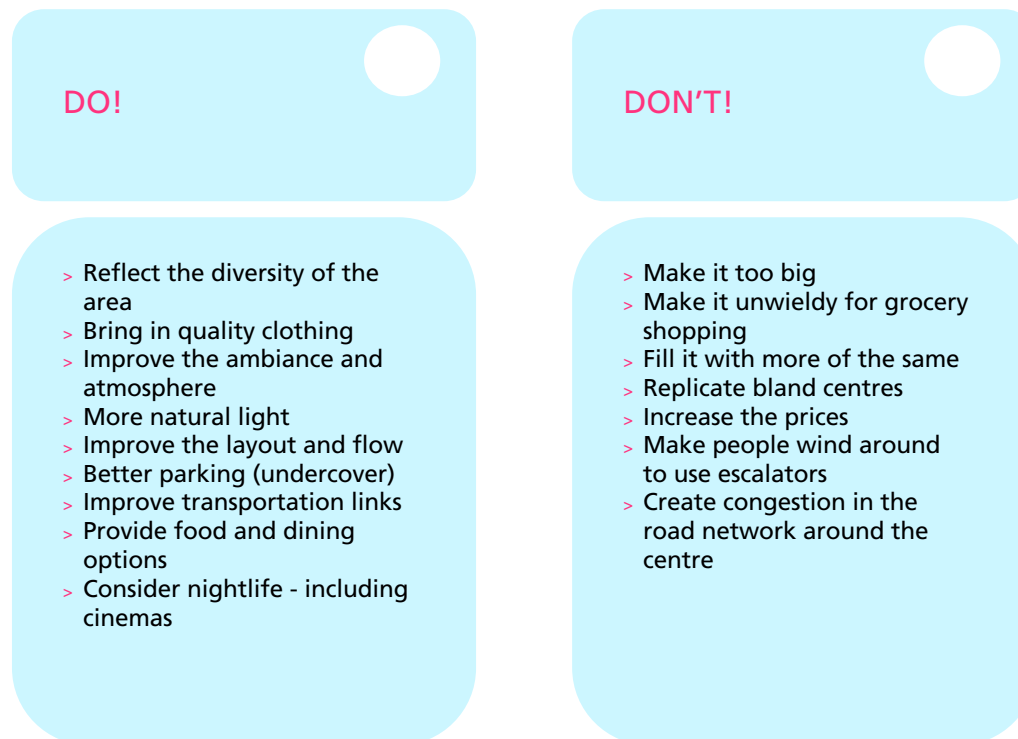


- > Very happy to be taking part in the research - had lots to say
- > Feel a real connection with the centre, a desire for it to grow and improve - and a sense that something needs to be done to maximise the potential of the customers around the centre
- > See changes in the customer profile over the years - and believe that Marrickville Metro should be attracting a higher income, higher spending customer
- > See an expansion (and revamp) as a critical aspect of accessing a higher spending customer - a customer focused on quality produce (not just cheap prices)
- > Feel the overall look and feel of the centre is really letting them down
- > Concerned about operational issues - undercover parking, free parking, smokers, trolleys, toilets, empty shops
- > Feel there should be more consultation and discussion with retailers
- > See an expansion as an opportunity to create a unique shopping destination - a village feel, a market feel

communityattitudessurvey

Is there sufficient support to continue with the research?

- > Without question, from the qualitative research, there is certainly support for an expansion of Marrickville Metro
- > For some, this support is qualified however - with the final design and feel of the centre all important
- > The opportunity is to create something unique and different, and a centre that is reflective of the area and the people that live there



Expansion will lead to behaviour change

- > Importantly, expansion is not only a 'nice idea' for residents, but it will lead to behaviour change
- > It will eliminate the fragmentation that currently exists in shopping choices in the area, and will provide a single solution for shopping needs
- > For each of the segments, this will alter their shopping routines
- > However, their love of the diversity of the area will also ensure they continue visiting areas such as King Street Newtown and Marrickville Road for specialised retailers and a different type of experience altogether



Visit more often → Increased frequency

Stay longer → Increased duration

The design of the community attitudes survey



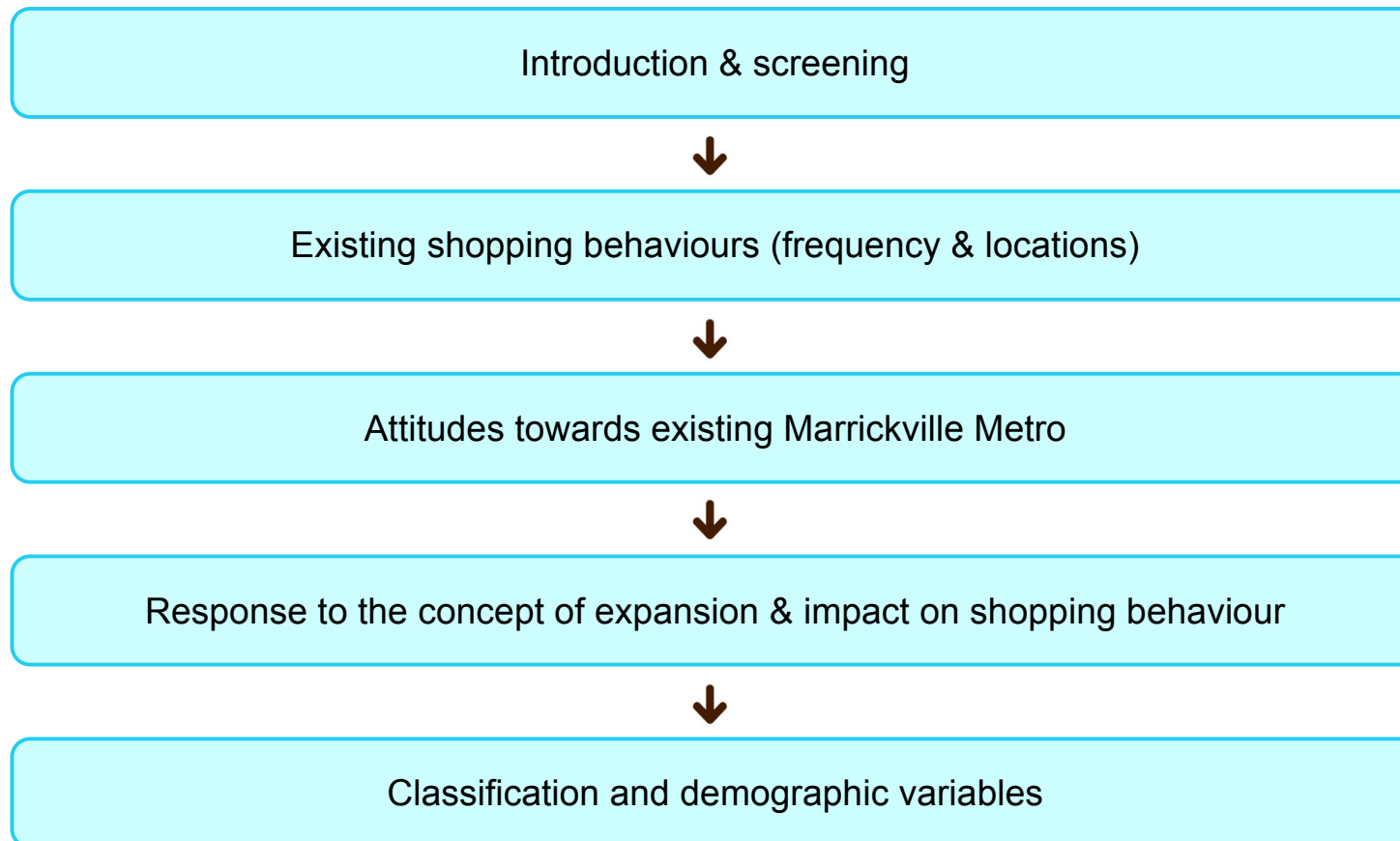
- > At this stage, these findings are only a qualitative understanding of the market
- > They do not provide us with 'hard' numerical data on the attitudes of the community
- > In order to provide a robust and reliable understanding of the true stance of the Marrickville community to the existing and potential retail offer in Marrickville, a community attitudes survey is required
- > It is essential that this be conducted with a random and representative sample of Marrickville residents
- > It is vital that we have total confidence in the findings of this survey in order to ensure that AMP Capital can move forward with appropriate and community minded plans for Marrickville Metro
- > The sample size with such a survey is critical in order to include a robust representation of the community
- > As such, our recommended sample size for the survey is:
 - > **N=1200**
- > The larger the sample, the more robust the results - that is, the smaller margin of error
- > Also, a large sample size provides much greater scope for segmentation and profiling - important for understanding the differences between for example centre versus strip shoppers, demographic groups (ie, younger vs older) and between clusters of appeal or concern that exist (and any particular characteristics that are held in common)

Community Attitudes Survey

- > Fully representative telephone survey of the Marrickville community
- > Need to quantify their attitudes and expectations of retail in the area
- > Quantify support (or otherwise) for expansion plans for Marrickville Metro
- > Understand how the current plans could be refined and improved?
- > Large scale quantitative telephone survey - 1200 responses
- > Questionnaire designed by Two Blind Mice
- > 15 minute interview (estimated)
- > Main household shopper (18+)
- > Fully representative of community population
- > Quotas for gender and age

Drafting the questionnaire

- > A draft questionnaire has now been prepared for moving forward with the quantitative measuring stage of the research - the community attitudes survey
- > Key 'chapters' of the questionnaire, and questions covered currently include:



Next steps





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