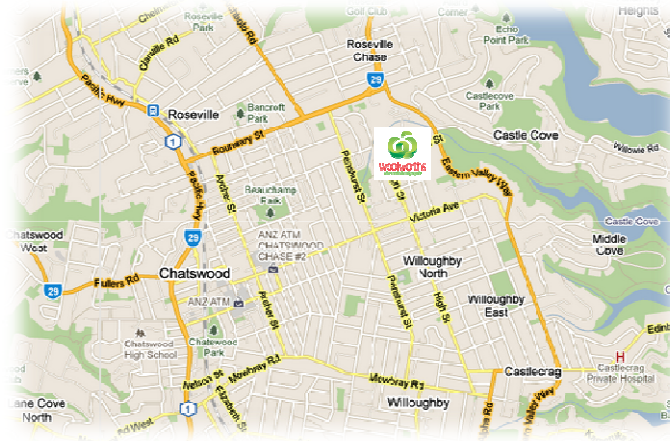


Research Findings:

Woolworths Chatswood



May 2011

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Background & Methodology

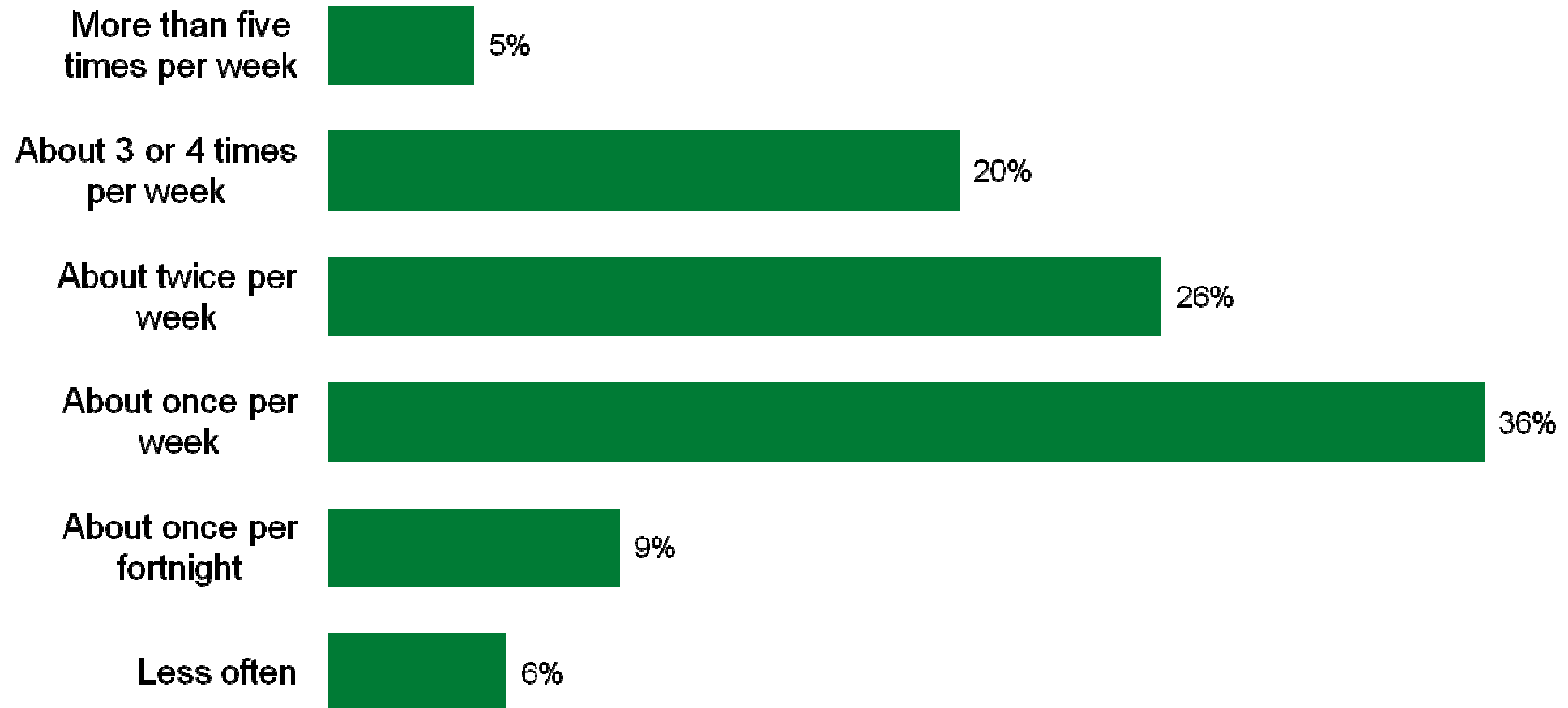
- The aim of this study was to investigate the support for a new supermarket.
- n=400 residents were interviewed using a CATI (Computer Assisted Telephone Interviews) system.
- Fieldwork was conducted between 5th – 20th May 2011 by Woolcott Research, in accordance with Market Research Society of Australia Standards.
- All participants were main or joint grocery buyers living in the Chatswood Area, as defined below:

Suburb	North Willoughby	East Willoughby	Middle Cove	Castle Cove	East Lindfield	Roseville	Roseville Chase	Chatswood
	11%	5%	4%	7%	11%	22%	5%	37%

Age	18-29 years	30-39 years	40-49 years	50-59 years	60-69 years	70 years or more
	6%	12%	24%	26%	14%	18%

- The margin for statistical error on a sample of 400 is within 4.9 percentage points in 95 out of 100 cases. The margin for error and caution should be applied when analysing demographic sub groups (e.g. age or suburb) within this sample.

Frequency of Grocery Shopping



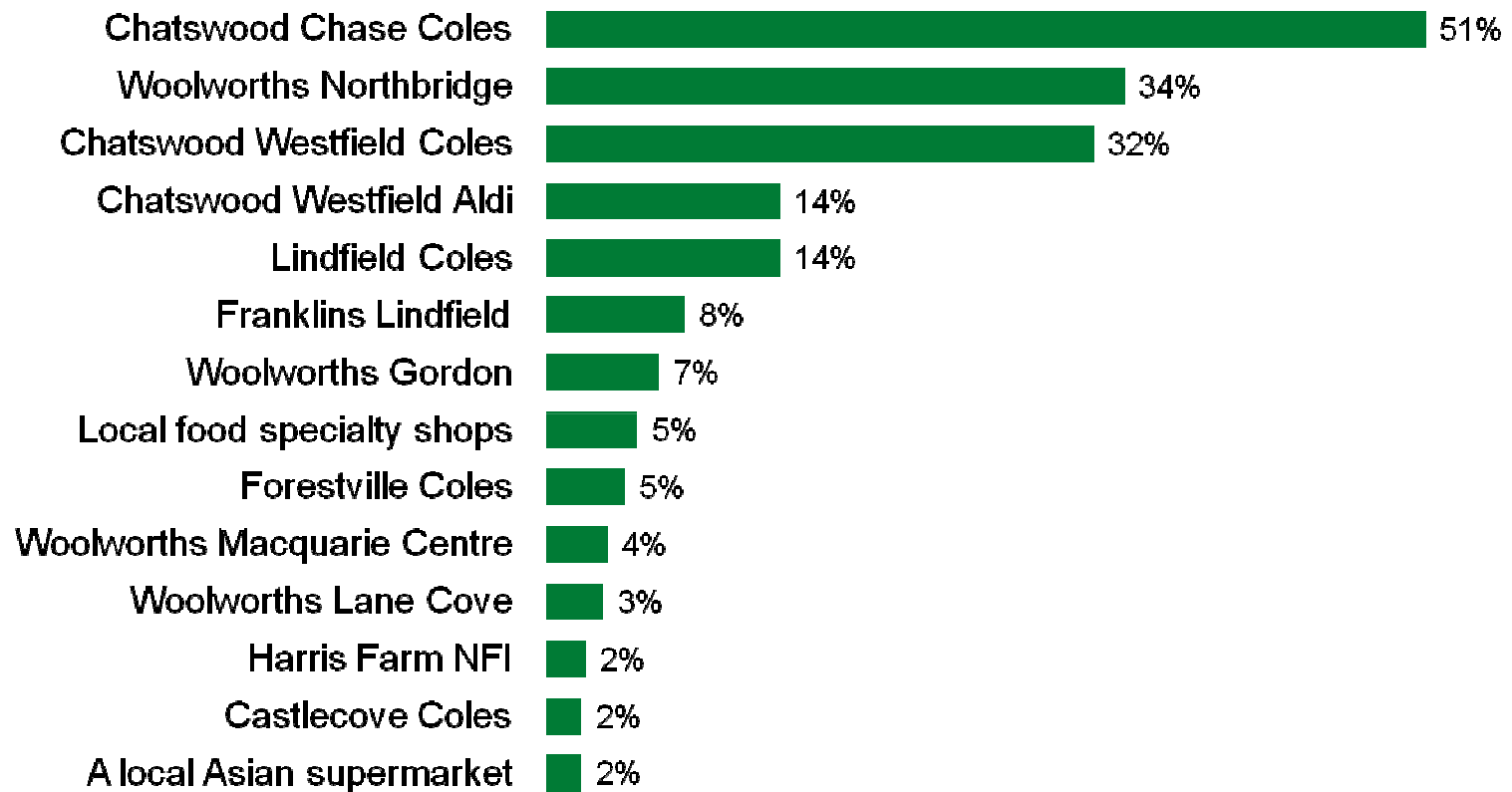
Q1. How often would you say you visit a supermarket to do grocery shopping?
(IF NECESSARY): If you visit more than one store on a grocery shopping trip, please count this as one trip.

Base: All Respondents (n=400)

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Frequently Visited Stores



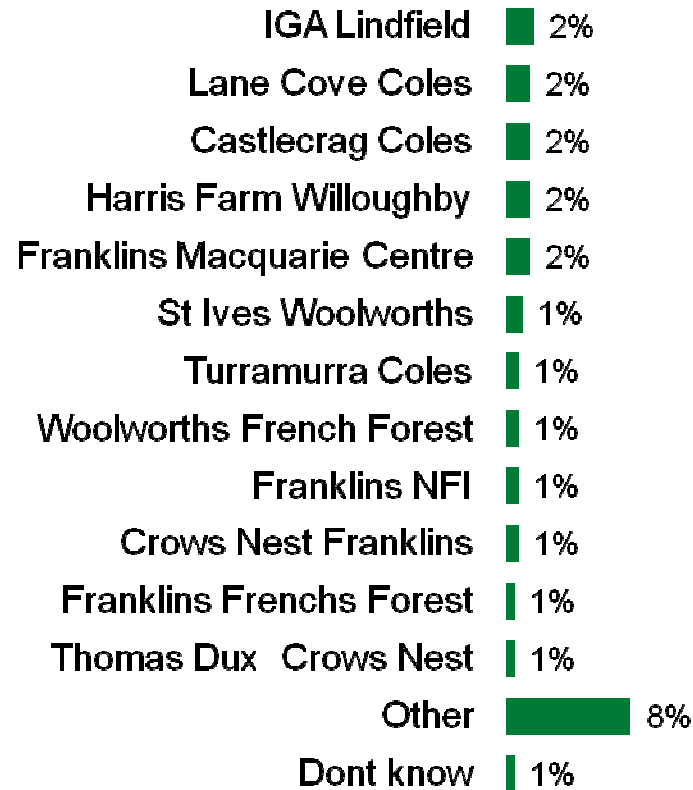
Q2. Can I ask, which supermarkets do you regularly visit? Are there any others you regularly visit? .

Base: All Respondents (n=400)

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Frequently Visited Stores



Q2. Can I ask, which supermarkets do you regularly visit? Are there any others you regularly visit? .

Base: All Respondents (n=400)

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Travel and Shopping

84% of respondents travel by car when shopping for groceries

59% of respondents indicated that they avoid supermarket shopping at times because it is too busy or congested

Q3. When shopping for groceries, do you usually travel by car?

Q4. Do you avoid supermarket shopping at certain times because it is too busy or congested?

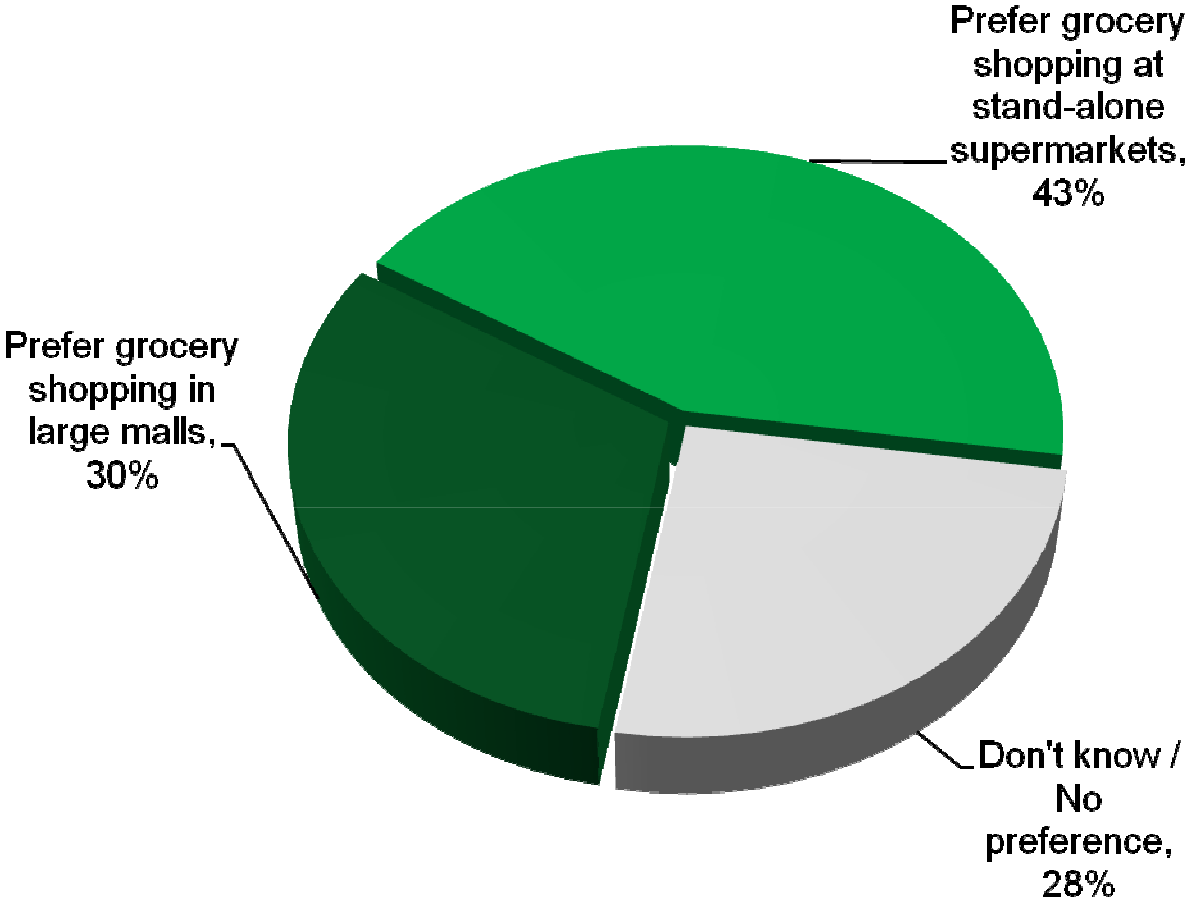
Base: All Respondents (n=400)

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Store Type Preference



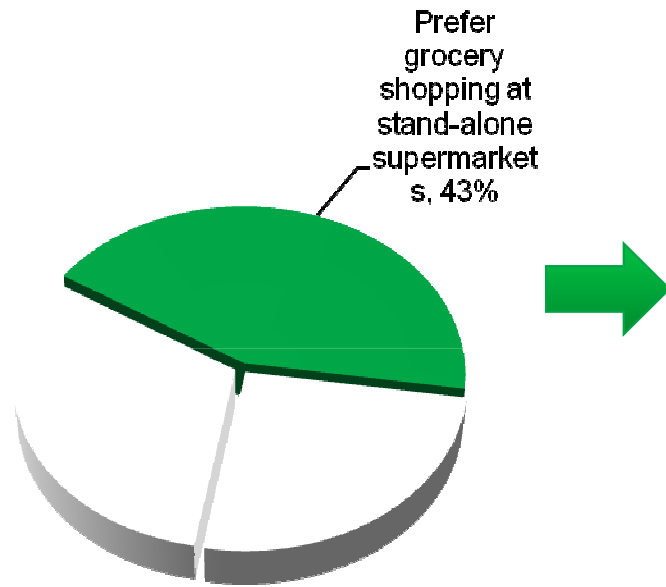
Q5a. All other things being equal, would you generally prefer to do your grocery shopping in a large mall, or in a stand-alone supermarket - that is, a supermarket that is not a part of a large mall?

Base: All Respondents (n=400)

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Store Type Preference – Stand Alone Supermarket



Of those that prefer a stand alone supermarket, the reasons cited were:

The parking is easier \ don't have to park in a big complex	36%
The shopping centre is too crowded \ busy	21%
They are easier to get in and out of	16%
When I'm doing my groceries I don't want to do other things \ just want to get done and out	11%
Access to your car is easier \ you can park closer \ better with a laden trolley	11%
You don't have to walk as far	8%
Convenience \ easier	8%
Big centres are noisy \ music blasting \ hot \ stale air	5%
Traffic is less	5%
They are nicer \ friendlier atmosphere	4%
The quality of the products is better \ better stocked	2%
Other	9%
Don't know	2%

Q5a. All other things being equal, would you generally prefer to do your grocery shopping in a large mall, or in a stand-alone supermarket - that is, a supermarket that is not a part of a large mall?

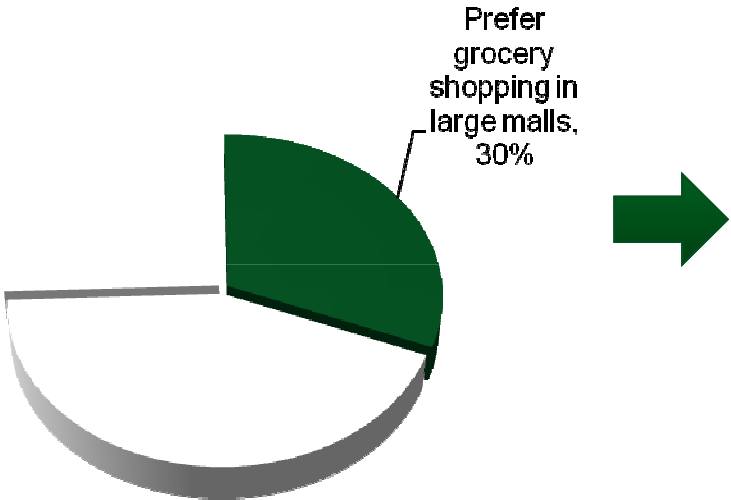
Q5b. Why would you say you prefer a large mall / stand alone supermarket?

Base: All Respondents (n=400)

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Store Type Preference – Large Malls



Of those that prefer a large mall, the reasons cited were:

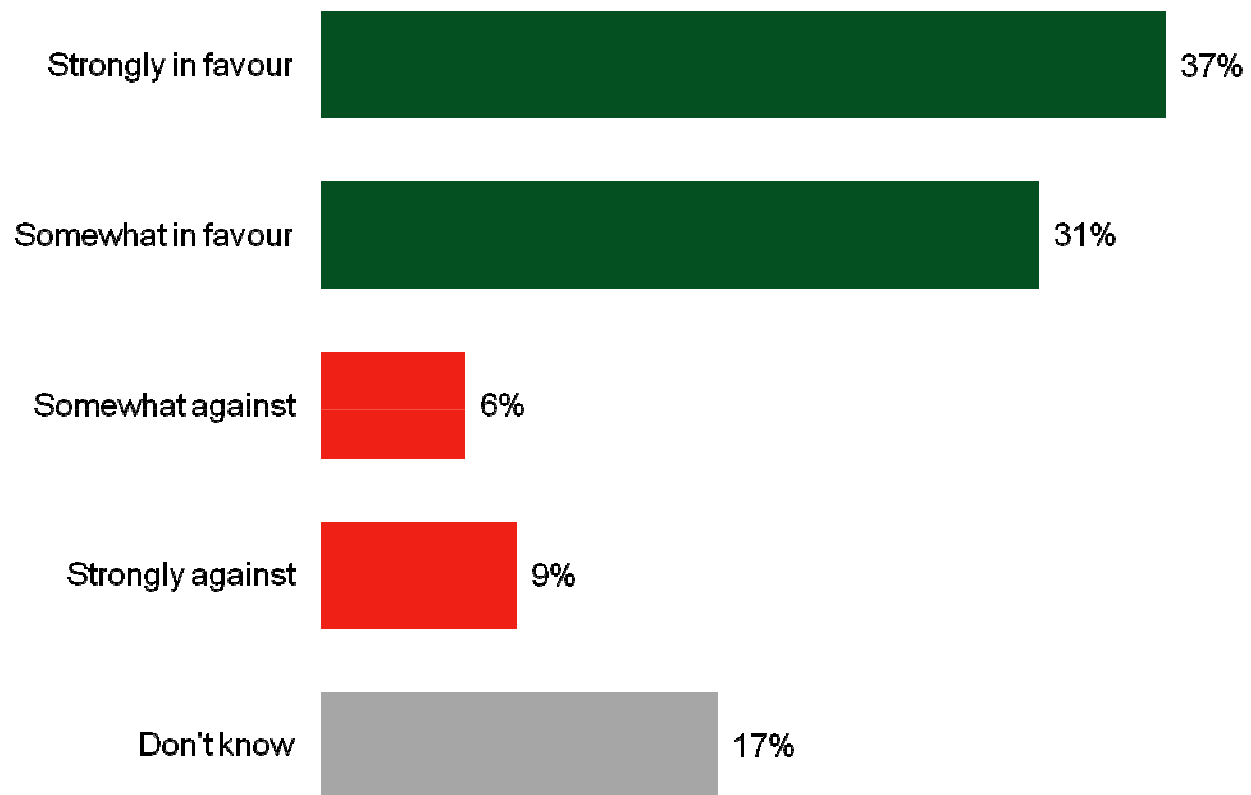
So I can do everything at the same time \ place \ go to other shops, bank etc.	64%
I like to have a choice \ e.g. if the fruit and veg is no good at supermarket I can go elsewhere	13%
The parking is good at a large mall	11%
Its convenient \ close by	7%
I like to walk around \ window shop	6%
We have no choice \ there's nowhere else we can go	4%
We make an outing of it \ have coffee, a meal	4%
There's more competition \ so prices are better	3%
It's comfortable \ spacious \ good in bad weather	3%
Just because its easy \ convenient NFI	3%
Other	5%

Q5a. All other things being equal, would you generally prefer to do your grocery shopping in a large mall, or in a stand-alone supermarket - that is, a supermarket that is not a part of a large mall?

Q5b. Why would you say you prefer a large mall / stand alone supermarket?

Base: All Respondents (n=400)

Support for New Woolworths Store in Chatswood



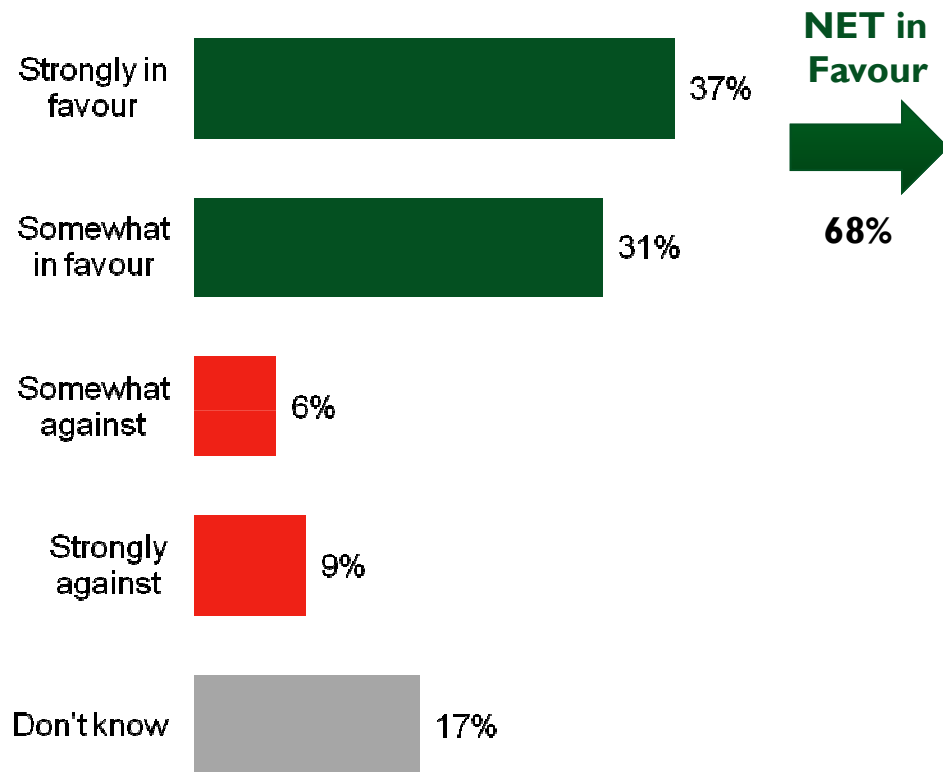
Q6. If there was a proposal for a new, stand alone, full-range Woolworths supermarket next to the new Bunnings on Smith Street in Chatswood, with parking underneath the store, would you be in favour, or against it?

Base: All Respondents (n=400)

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Who was most likely to be in favour of the new store?



Those who were more likely to be in favour were:

- Those who spoke a language other than English at home 82%
- Those with an annual income over \$150,000 78%
- Those under 40 years of age 77%
- Those 40-59 years of age 74%
- Those who prefer shopping at a large mall 70%
- Those who shop more than once per week 70%

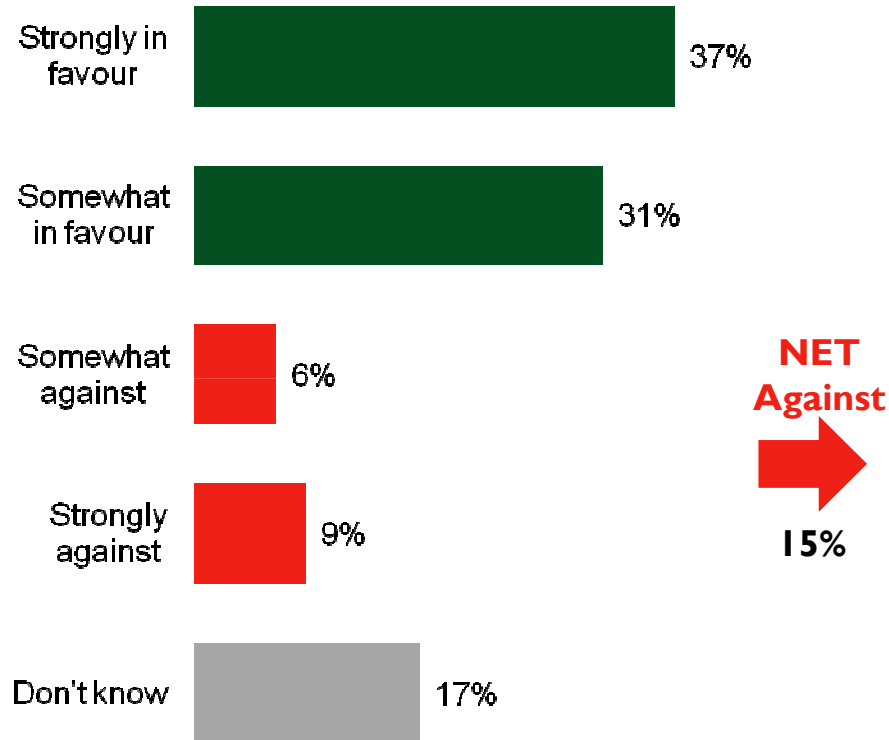
Q6. If there was a proposal for a new, stand alone, full-range Woolworths supermarket next to the new Bunnings on Smith Street in Chatswood, with parking underneath the store, would you be in favour, or against it?

Base: All Respondents in favour of the new supermarket (n=272)

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Who was most likely to be against of the new store?



Those who were more likely to be against were:

Those aged 60 years or more	22%
Those with an annual income under \$60,000	22%
Those that shop at Woolworths Northbridge	20%
Residents of North or East Willoughby / Middle Cove / Castle Cove	18%

Q6. If there was a proposal for a new, stand alone, full-range Woolworths supermarket next to the new Bunnings on Smith Street in Chatswood, with parking underneath the store, would you be in favour, or against it?

Base: All Respondents against the new supermarket (n=59)

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Reasons For **Support** of New Store

	In Favour N=207 %
It is convenient \ to my home, work \ closer than others	38%
The parking will be convenient \ better than elsewhere	17%
Having some competition will be good \ prices may benefit	16%
I like Woolworths \ will be good to have one here	14%
It will be easier to get in and out of \ like not having to negotiate the busy areas	12%
It would give more choice	9%
Its convenient \ easy NFI*	8%
It will take some pressure off the other centres \ make them less congested	6%
Because of its proximity to Bunnings \ we go to Bunnings	5%
I like that its stand-alone	5%
Because Chatswood doesnt have a Woolworths	4%
I would worry that it may make traffic worse	1%
Other	8%
Dont know	1%

Q7. Why would you be in in favour of this supermarket?

Base: All Respondents in favour of new supermarket (n=272)

* NFI – No Further Information

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Reasons For Being **Against** New Store

	Against n=59 %
Theres too much congestion now \ it will make traffic worse	32%
No need \ have enough supermarkets as it is	22%
Too far away from me \ hard to get to	17%
Im over the big conglomerates \ want to support smaller centres	15%
I dont like Woolworths	8%
Because its in an awkward spot \ access would be awkward	8%
Too far away from everything else \ other shops	5%
Chatswood is already overdeveloped	5%
Other	10%

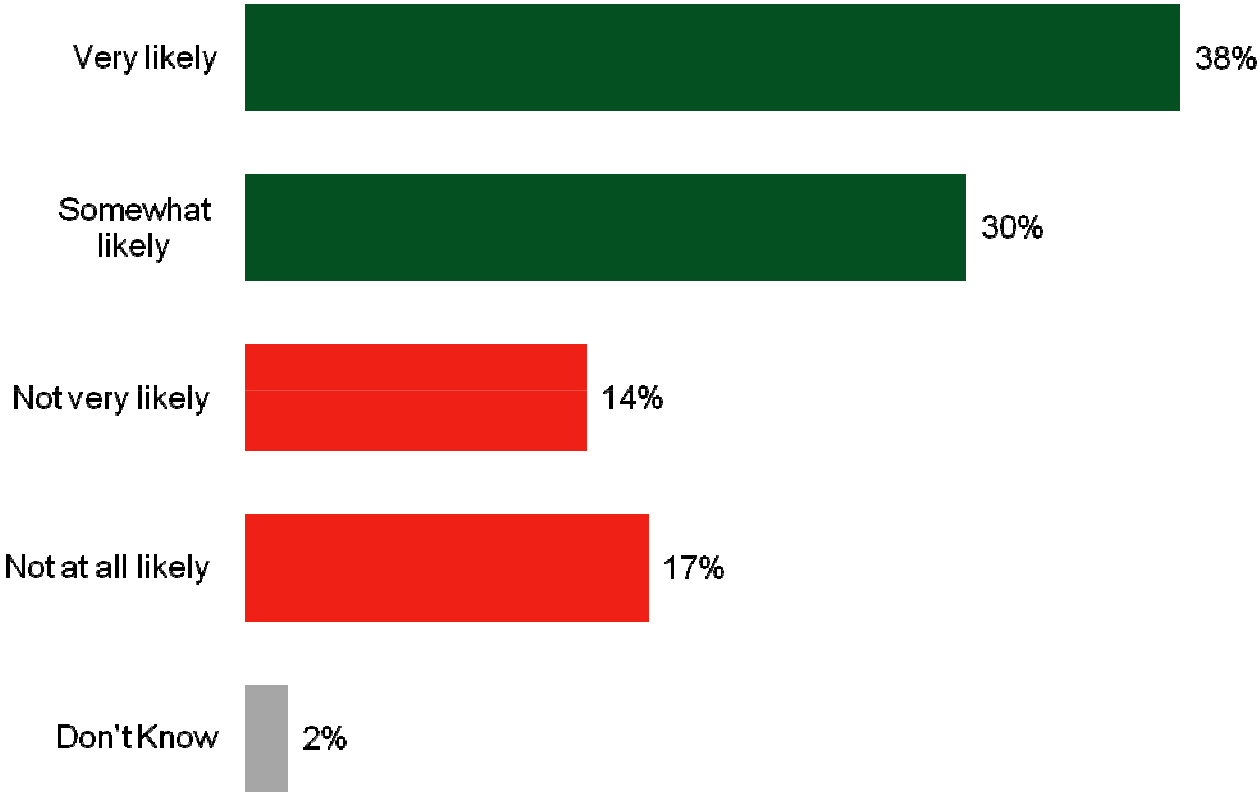
Q7. Why would you be in against this supermarket?

Base: All Respondents against new supermarket (n=59)

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Likelihood of shopping at New Woolworths Store in Chatswood



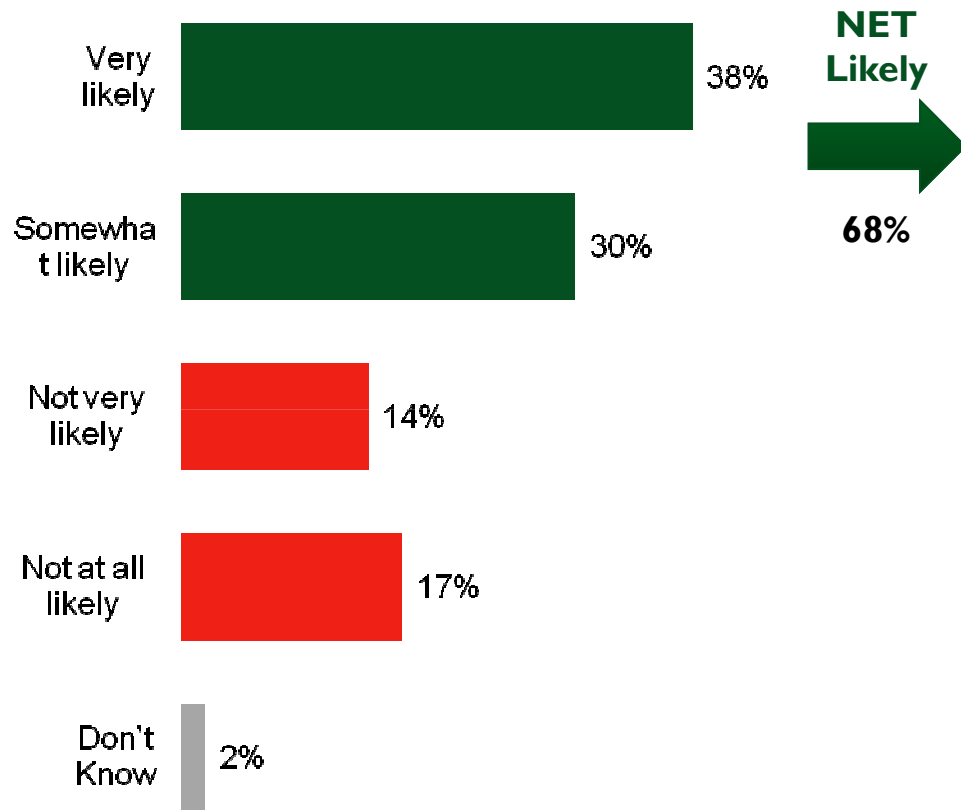
Q8. If a new full-range, stand-alone supermarket, next to the new Bunnings in Chatswood went ahead, would you be very likely, somewhat likely, not very likely, or not at all likely to shop there?

Base: All Respondents (n=400)

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Who is most likely to shop at the new store?



Those who would be more likely to shop at the new store were:

Those with an annual income over \$150,000	83%
Those who currently shop at Woolworths Northbridge	79%
Residents of North or East Willoughby / Middle Cove / Castle Cove	76%
Those 40-59 years of age	76%
Those under 40 years of age	75%
Those who spoke a language other than English at home	75%

Q8. If a new full-range, stand-alone supermarket, next to the new Bunnings in Chatswood went ahead, would you be very likely, somewhat likely, not very likely, or not at all likely to shop there?

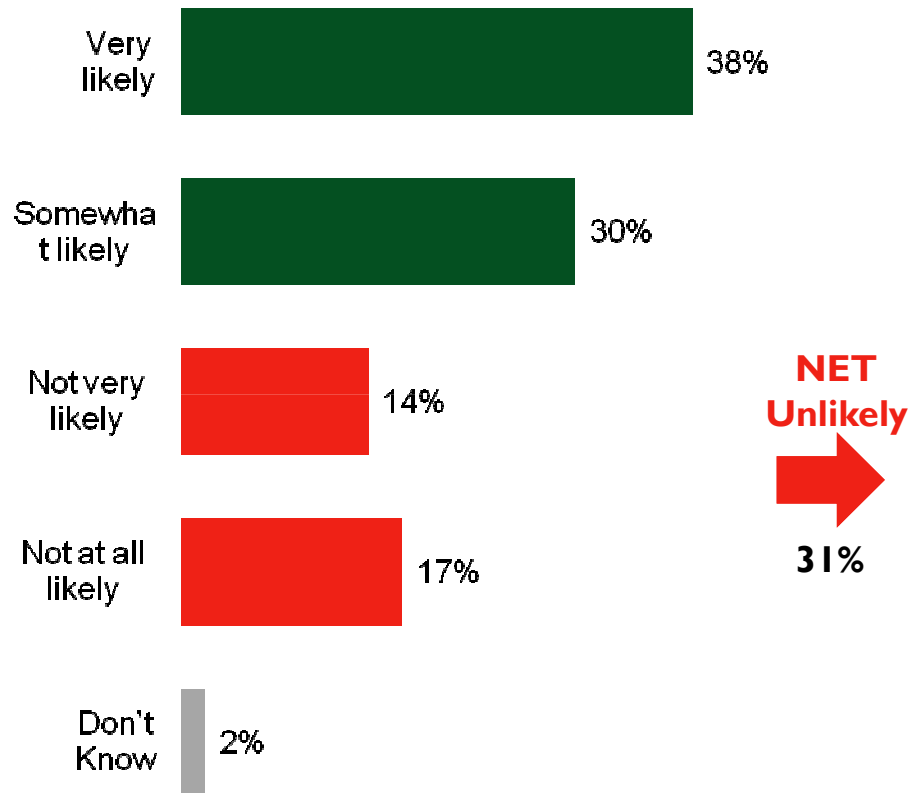
Base: All Respondents likely to shop at the new supermarket (n=271)

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Who is least likely to shop at the new store?



Those who would be less likely to shop at the new store were:

- Those aged 60 years or more 47%
- Those with an annual income under \$60,000 37%
- Those who prefer to shop at a stand-alone supermarket 35%
- Residents of Chatswood 34%

Q8. If a new full-range, stand-alone supermarket, next to the new Bunnings in Chatswood went ahead, would you be very likely, somewhat likely, not very likely, or not at all likely to shop there?

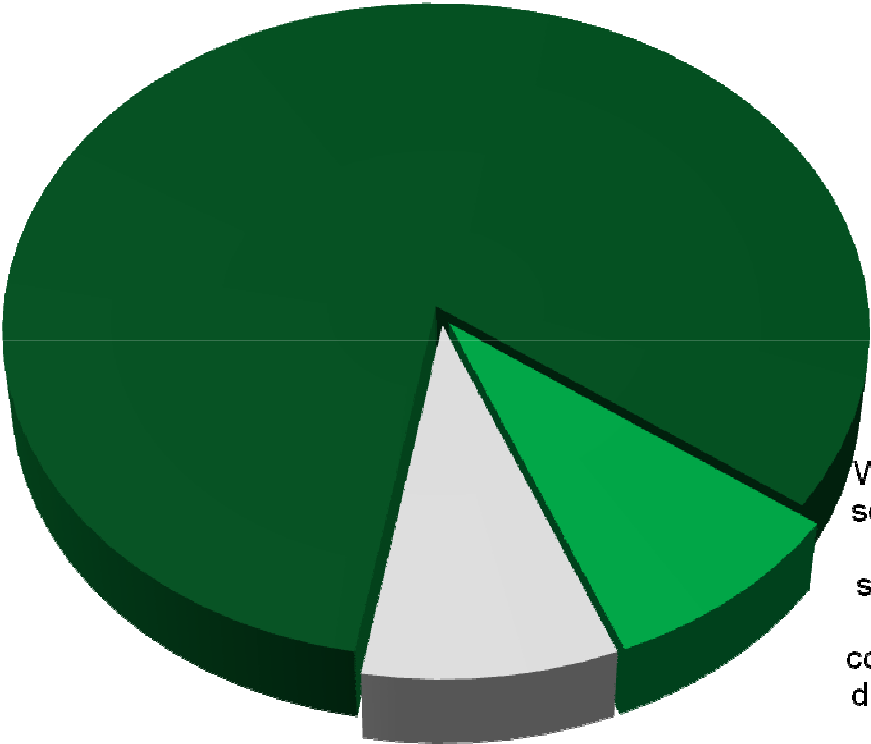
Base: All Respondents not likely to shop at the new supermarket (n=122)

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Desire for Discussion with Local Community

Would like to see this proposal for a new supermarket put forward for consideration and discussion within the local community, 80%



Would not like to see this proposal for a new supermarket put forward for consideration and discussion within the local community, 11%

Don't know / No preference, 9%

Q9. Would you like to see this proposal for a new supermarket put forward for consideration and discussion within the local community?

Base: All Respondents (n=400)

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Summary of Results

- There is a great deal of support for the opening of a new Woolworths store in Chatswood, with almost three quarters of respondents (68%) indicating they were either strongly or somewhat in favour of the new store.
- Similarly, 68% of respondents indicated that they were very likely or somewhat likely to shop at the new store.
- The majority of respondents (80%) would however like to see a proposal for the new supermarket put forward for consideration and discussed with the local community.
- Those that were in favour of the supermarket said it would be convenient from their home or workplace (38%) and felt that the parking would be better than elsewhere (17%).
 - ⇒ Some also mentioned that a new store would increase competition in the area which may affect prices (16%), and that they liked Woolworths and would like one nearby (14%).
 - ⇒ The location was also a plus, with 12% saying that the new supermarket would be easier to get in and out of and that they would not have to negotiate the busy areas (12%).
- Those who were not in favour of the new supermarket believed it could lead to more traffic congestion (32%), and felt that there was no need for it in the area (22%).

Summary of Results

- Those who would be more likely to shop at the new store included:
 - ⇒ Those with an annual income over \$150,000 (83%, compared to the total of 68%)
 - ⇒ Those who currently shop at Woolworths Northbridge (79%)
 - ⇒ Residents of North or East Willoughby / Middle Cove / Caste Cove (76%)
 - ⇒ Those aged 40-59 years of age (76%)
 - ⇒ Those under 40 years of age (75%)

- Interestingly, residents of North Willoughby, East Willoughby, Middle Cove and Castle Cove were initially more likely to be against the new supermarket (18%, compared to 15% for the total respondent base), but then indicated they were more likely to shop there (76%, compared to 68%).

- There is a possibility that the new Woolworths store in Chatswood could attract customers from Woolworths Northbridge in particular, with 39% of those who indicated they would be likely to shop at the new Woolworths currently shopping at Woolworths Northbridge regularly.

Respondent Profile

		Total n=400
Age		
18-29 years		6%
30-39 years		12%
40-49 years		24%
50-59 years		26%
60-69 years		14%
70 years or more		18%
Gender		n=400
Male		31%
Female		70%
Employment Status		n=400
Working full time		34%
Working part time		25%
Student		2%
Unemployed		2%
Engaged in home duties		10%
Retired		28%
Refused		1%

		Total n=400
Income		
Under \$20,000		2%
\$20,000-\$39,999		6%
\$40,000-\$59,999		8%
\$60,000-\$99,999		15%
\$100,000-\$149,999		11%
\$150,000-\$199,999		8%
\$200,000 plus		17%
Refused		34%
Number of people in household		n=400
Average		2.7