



CROSBY | TEXTOR  
RESEARCH STRATEGIES RESULTS

Taren Point Development Research

INTERIM REPORT

March 2016



# Aim & Summary Methodology

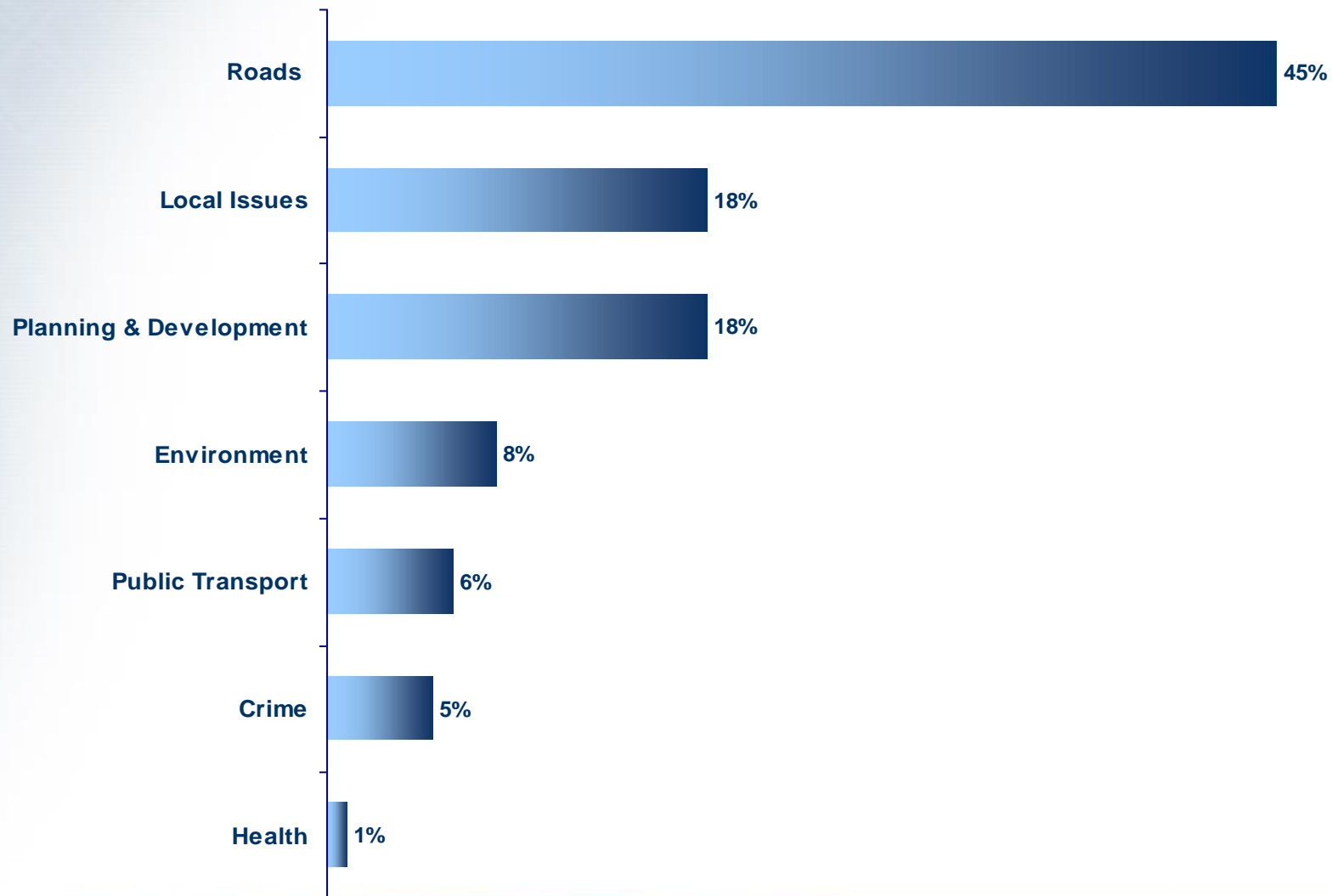
- To provide strategic, public opinion-based insights to the Woolworths team and other key decision-makers on the proposed development
- CATI survey conducted 23<sup>rd</sup> - 29<sup>th</sup> March of n=750:
  - > Sutherland Shire residents (data broken down by the five wards)
- Sample accurate to +/-3.58% margin of error (at the 95% confidence interval)
- Questionnaire design included:
  - > Issue agenda (spontaneous and prompted);
  - > Support for a proposed supermarket development;
  - > Reasons for support or opposition (spontaneous and prompted);
  - > Opinions of key players, State voting intention and effects of support on vote.
- Minimum quotas and data weighting on area, sex and age to ensure accuracy.



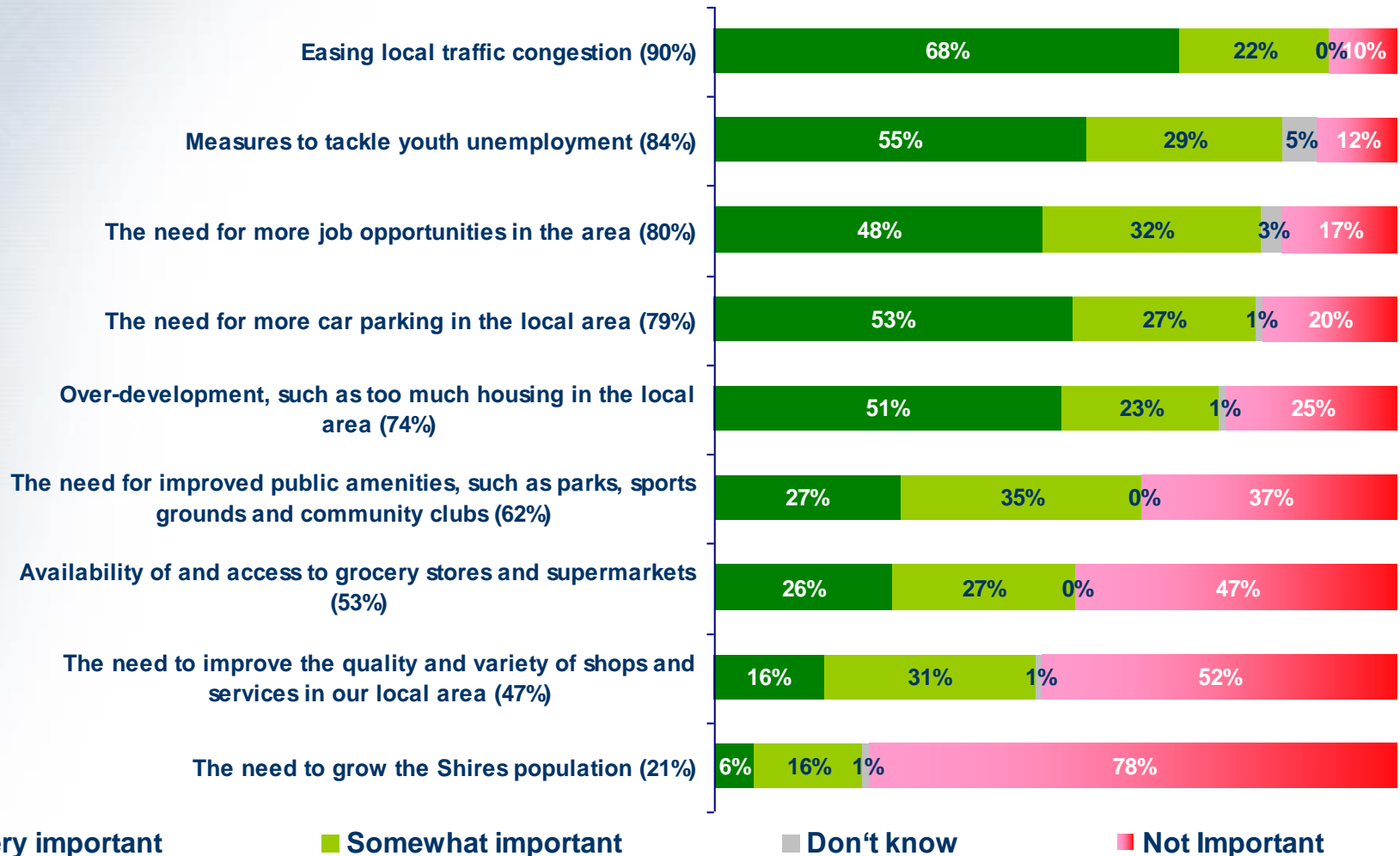
# The Context: Issue Agenda



The top unprompted issue of concern relates overwhelmingly to roads. 'Local issues' range from issues with footpaths, parks and sporting facilities.



# Upon prompting, traffic congestion is still the number one issue, while youth unemployment and job opportunities also feature prominently.



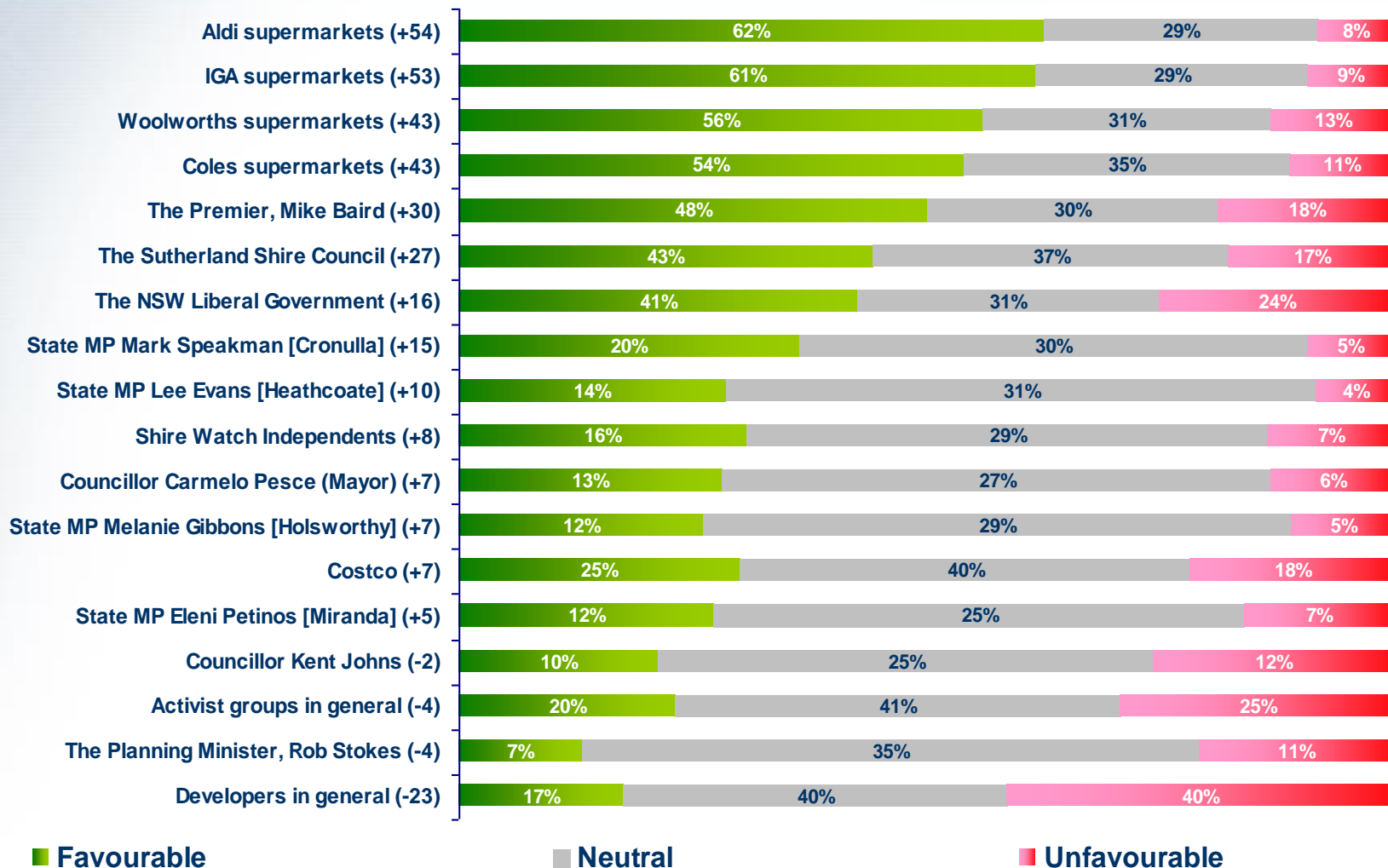
*N.B. Sorted by Total important (given in brackets)*



# Perceptions of Players: Figures & Organisations



# Supermarkets rate quite favourably among voters. Local members and councilors are quite unknown among their constituents.



N.B. Sorted by net favourability (given in brackets) = % Favourable - % Unfavourable

Q3) I'm now going to read out a number of people, groups and organizations, and for each I'd like you to simply tell me whether you have a favourable, neutral or unfavourable view of them.

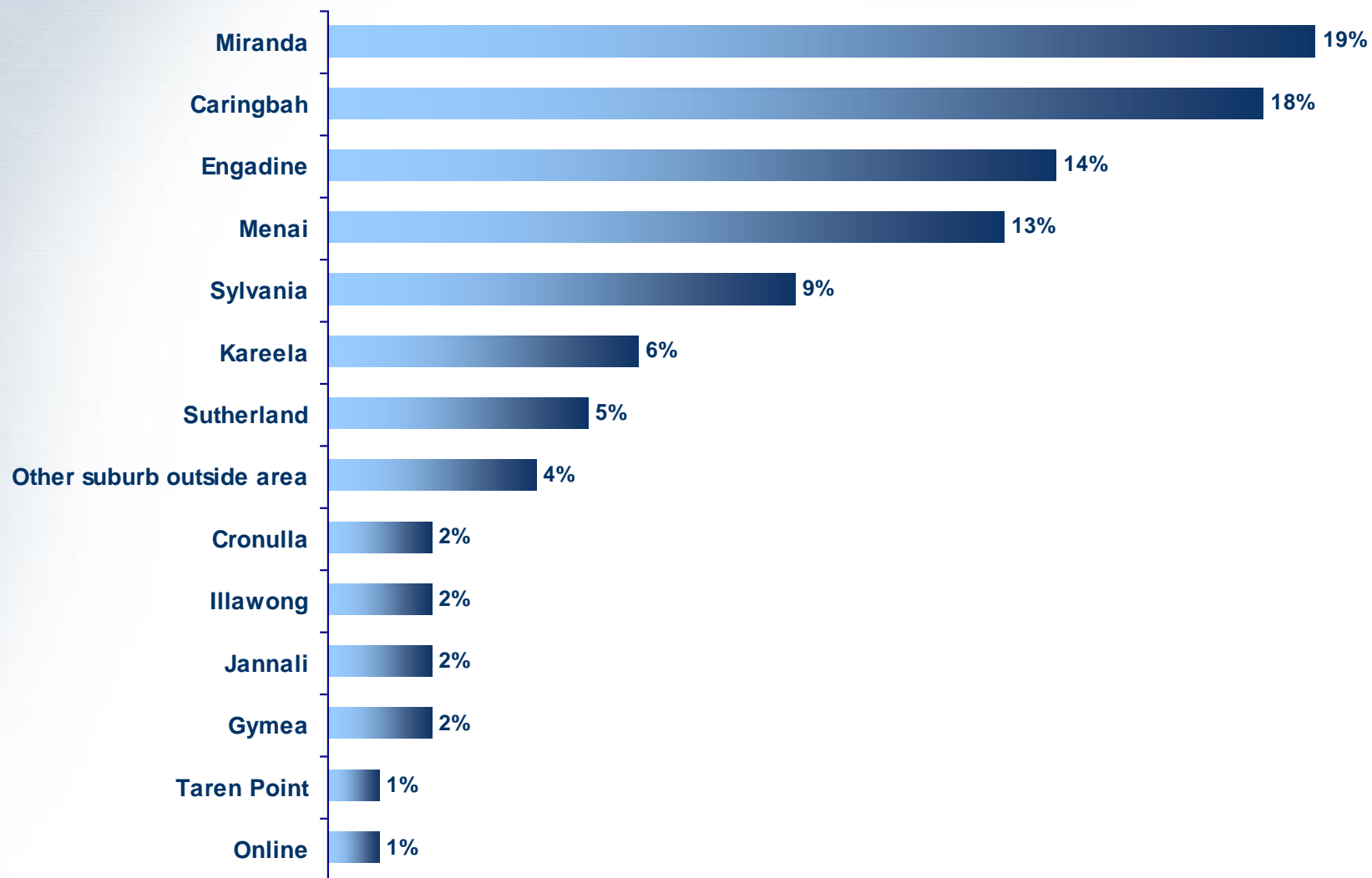


# Shopping Habits



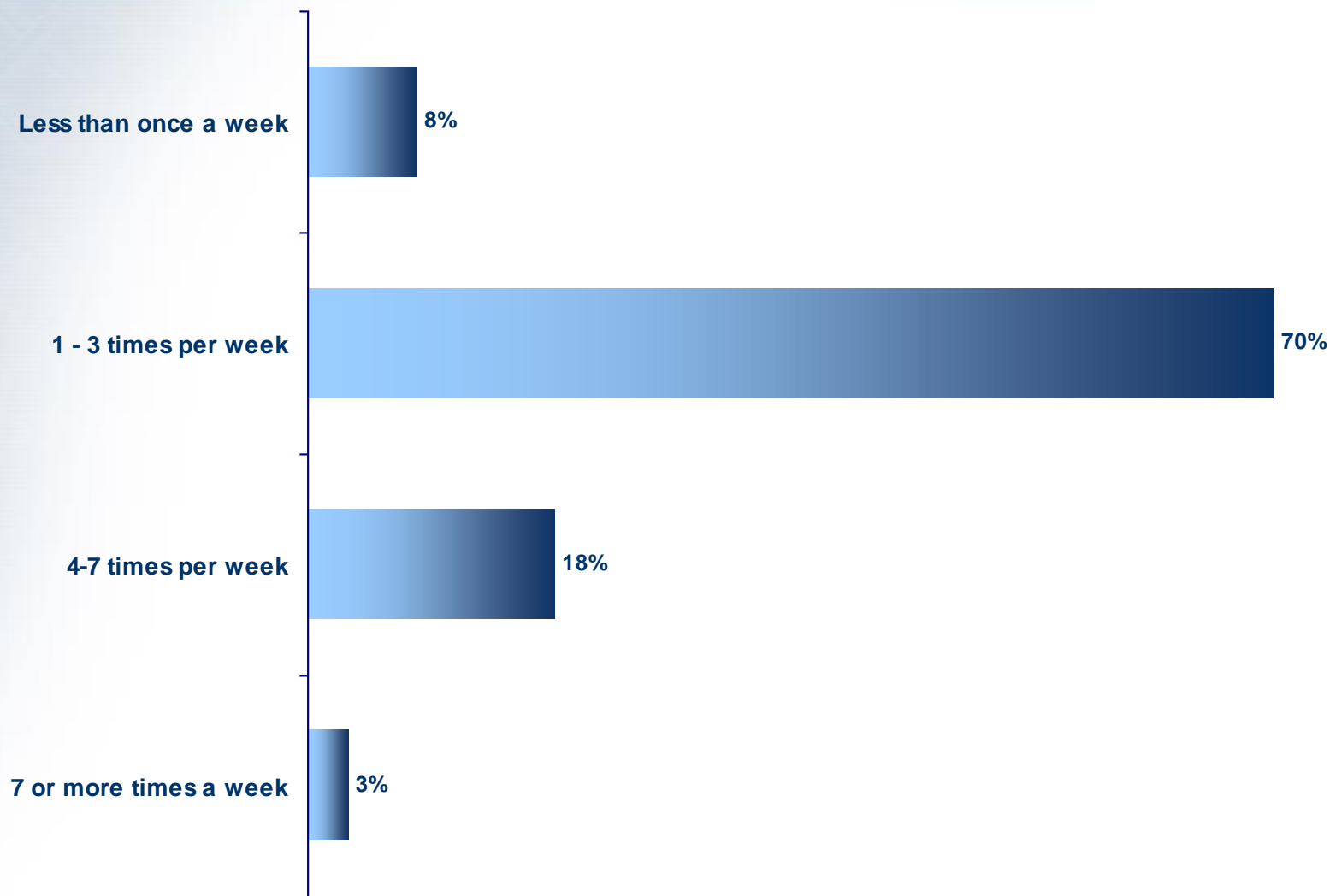


# Miranda and Caringbah are the main suburbs Shire residents are shopping in.



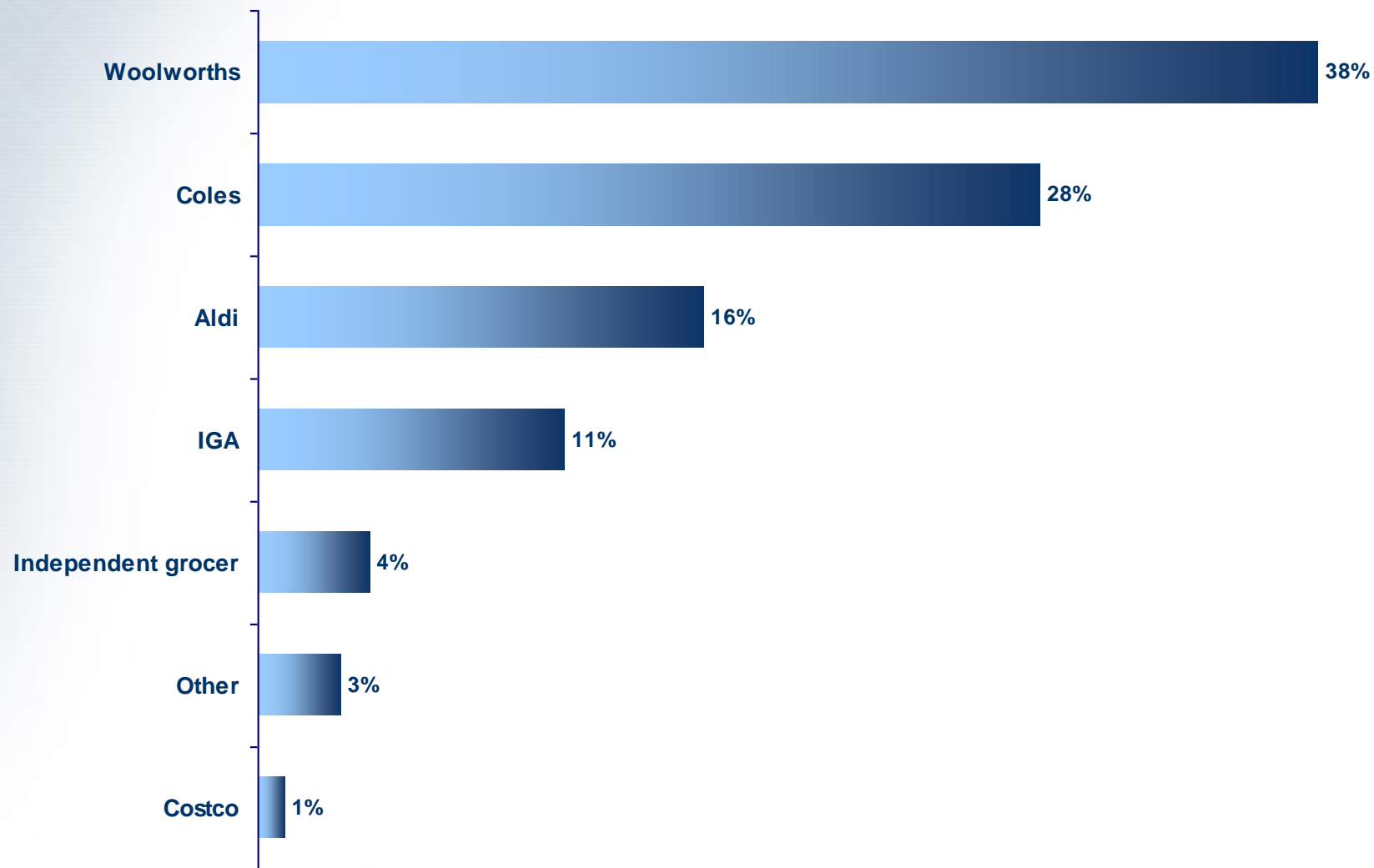


## And most voters are shopping 1-3 times per week in various locations.



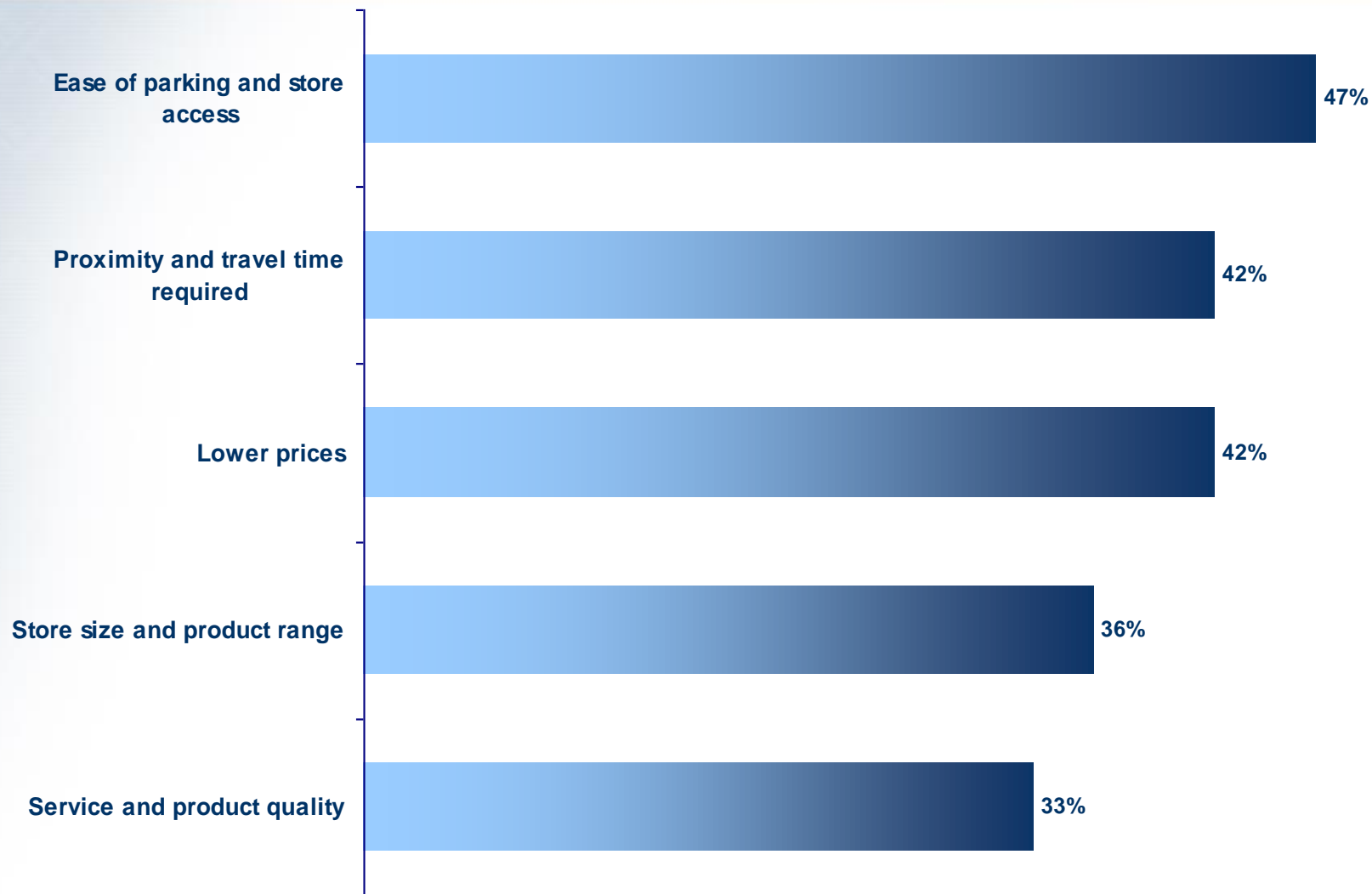


# Voters are reportedly preferring Woolworths as their preferred supermarket.





# The most important features of local stores or supermarkets relate to convenience and price.

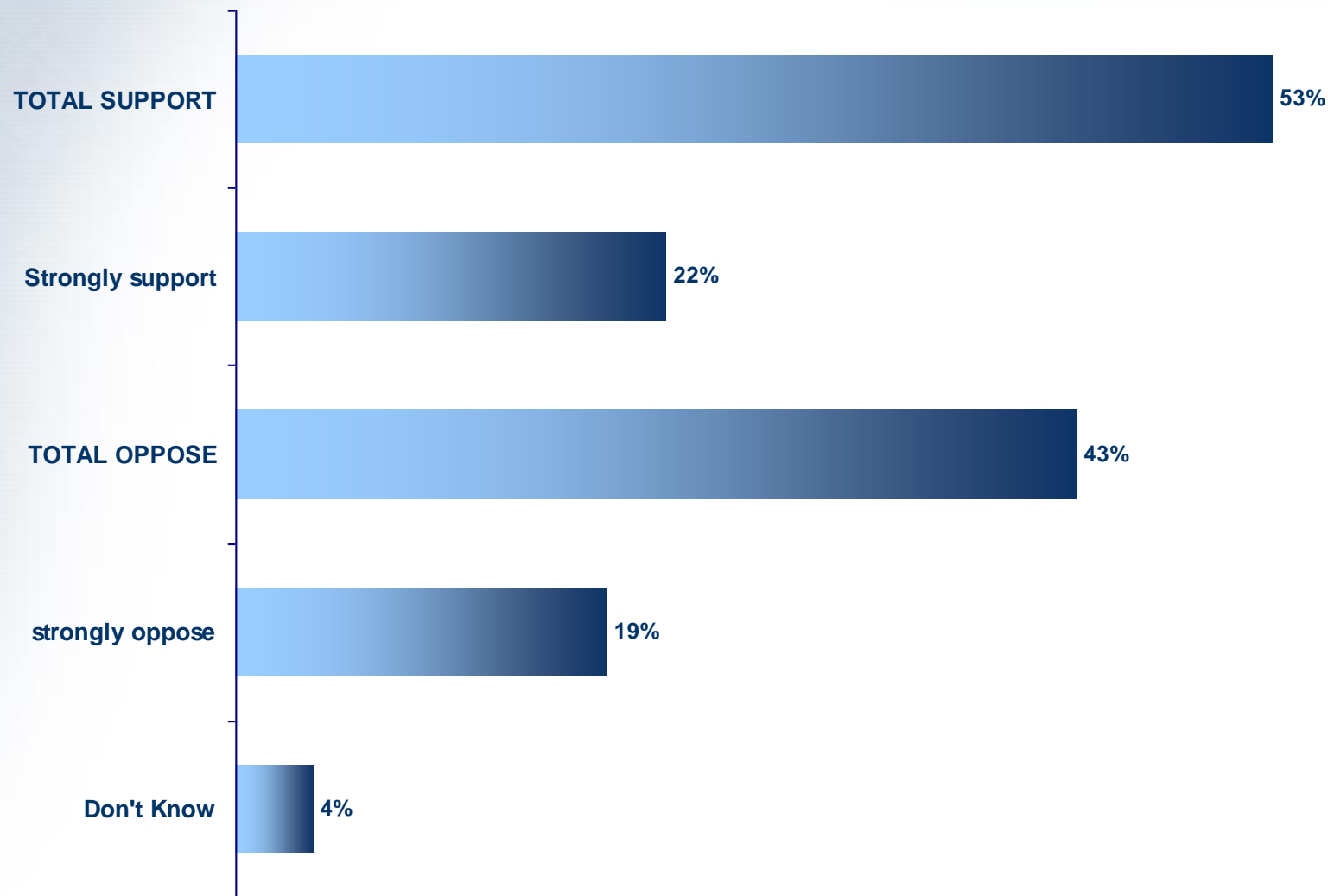




# The Current Position: Opinion & Messaging



# Support is divided about the proposal to provide supermarkets in the area.



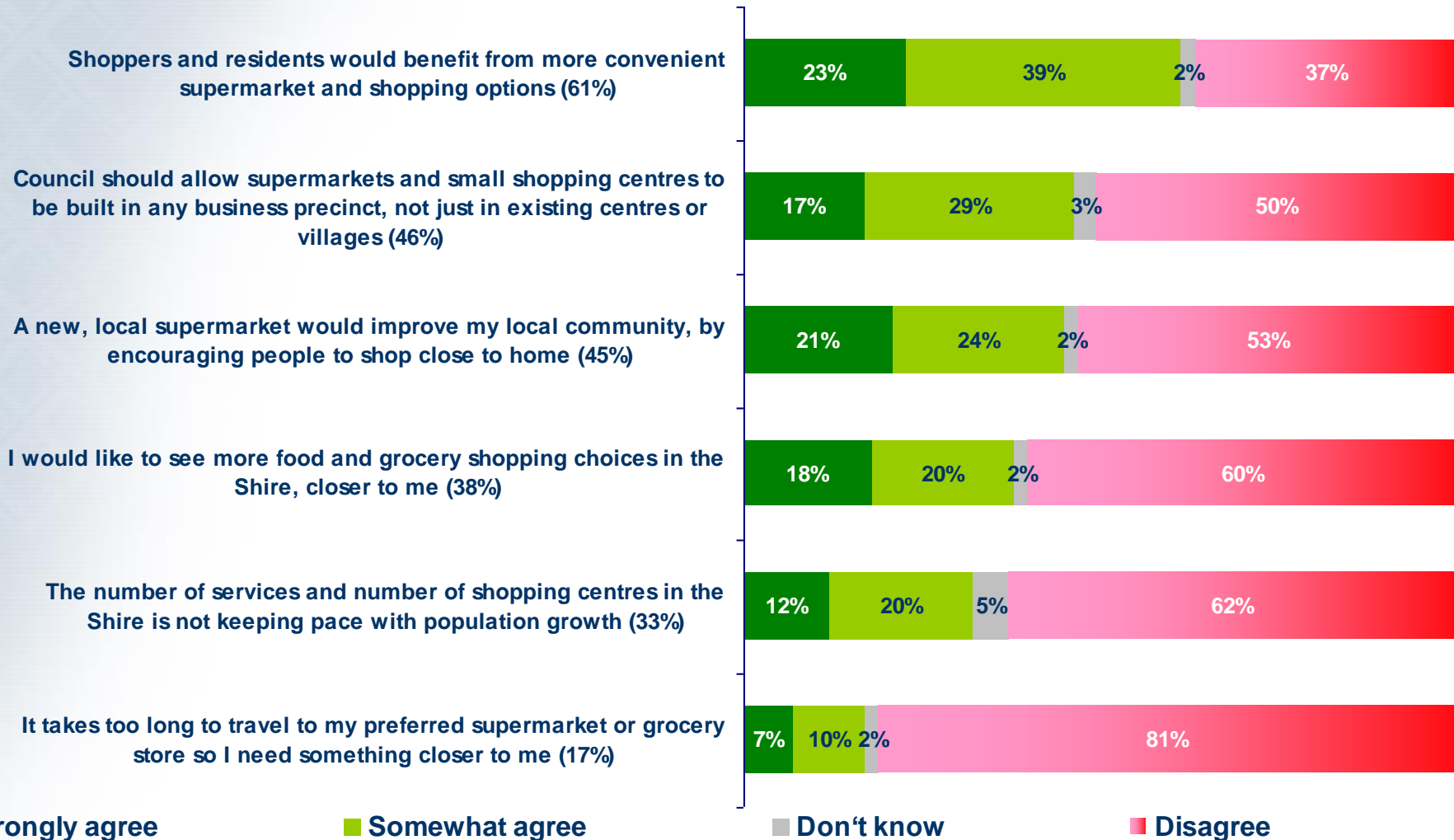


# Convenience, variety and range are key credible reasons for choosing a shopping centre, as are opportunities for local business and jobs



N.B. Sorted by Total important (given in brackets)

# Of less credibility are concerns about current travel time to a preferred supermarket and the *need* for more shopping choices, i.e. they are not a current issue



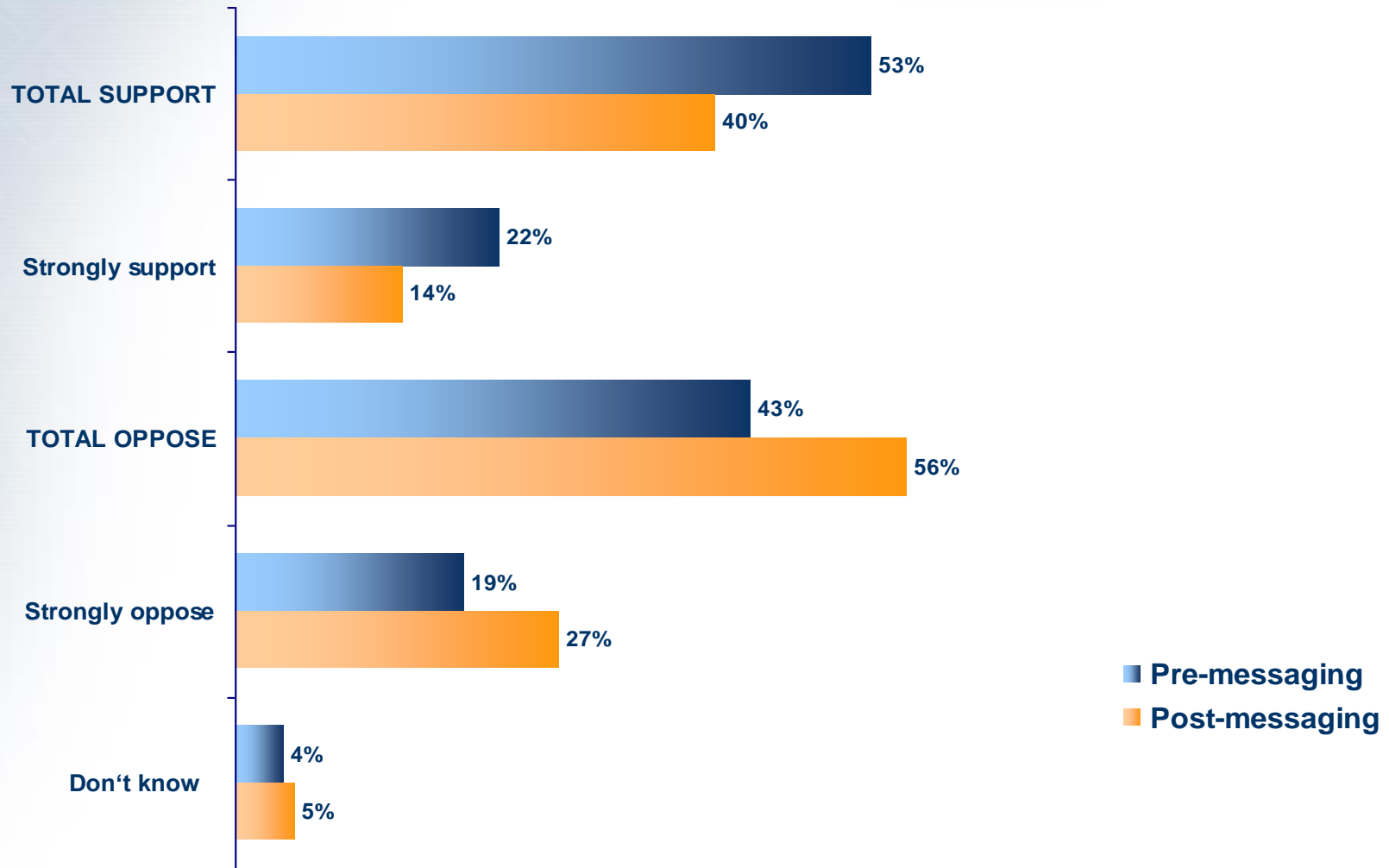
N.B. Sorted by Total important (given in brackets)





# Considered Opinion

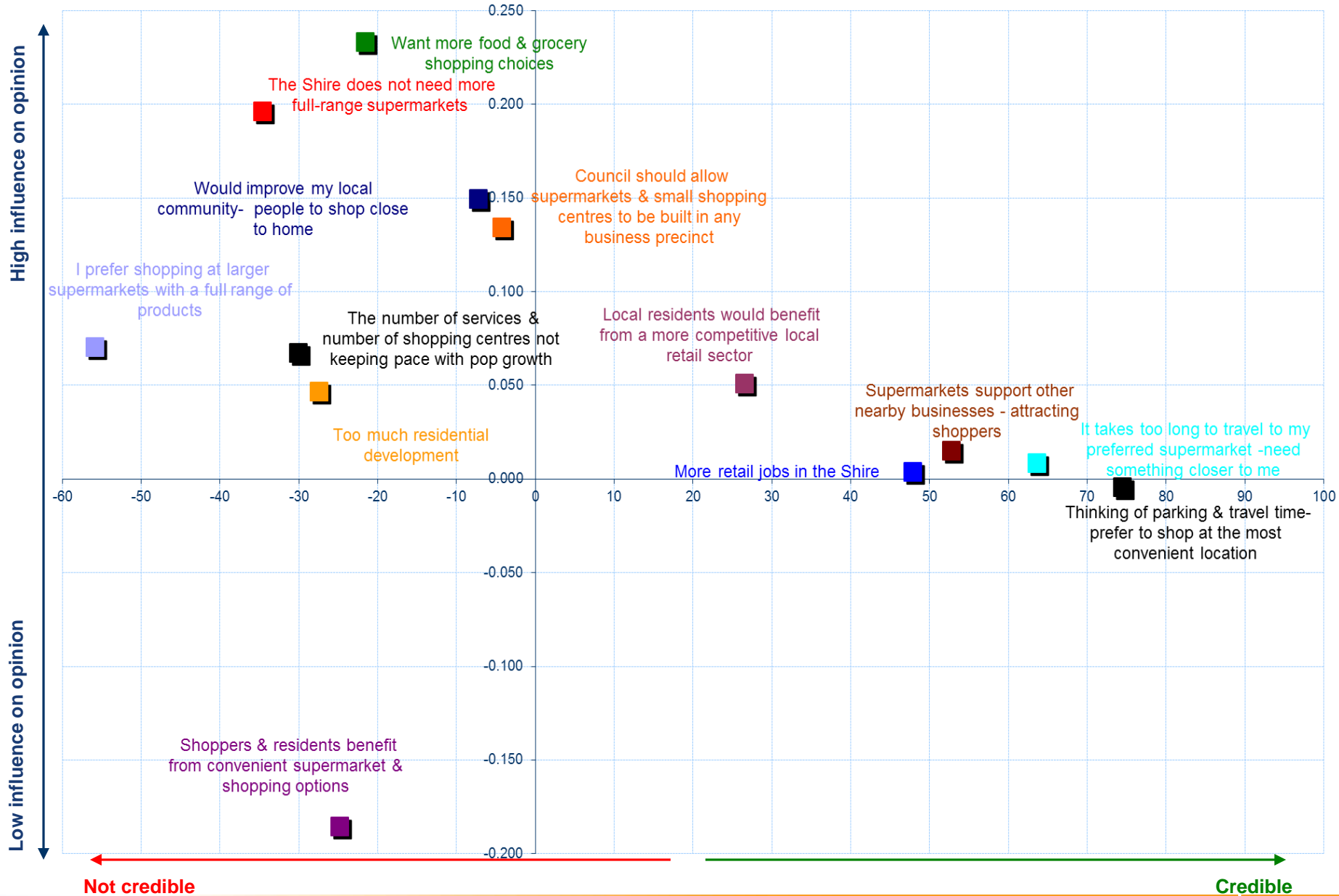
# After prompted messaging of arguments both for and against the development of full-range supermarket options, overall support decreases.



Q7f) Based on your experiences of shopping in the Shire, would you support or oppose the provision of more full range supermarkets in your local area?

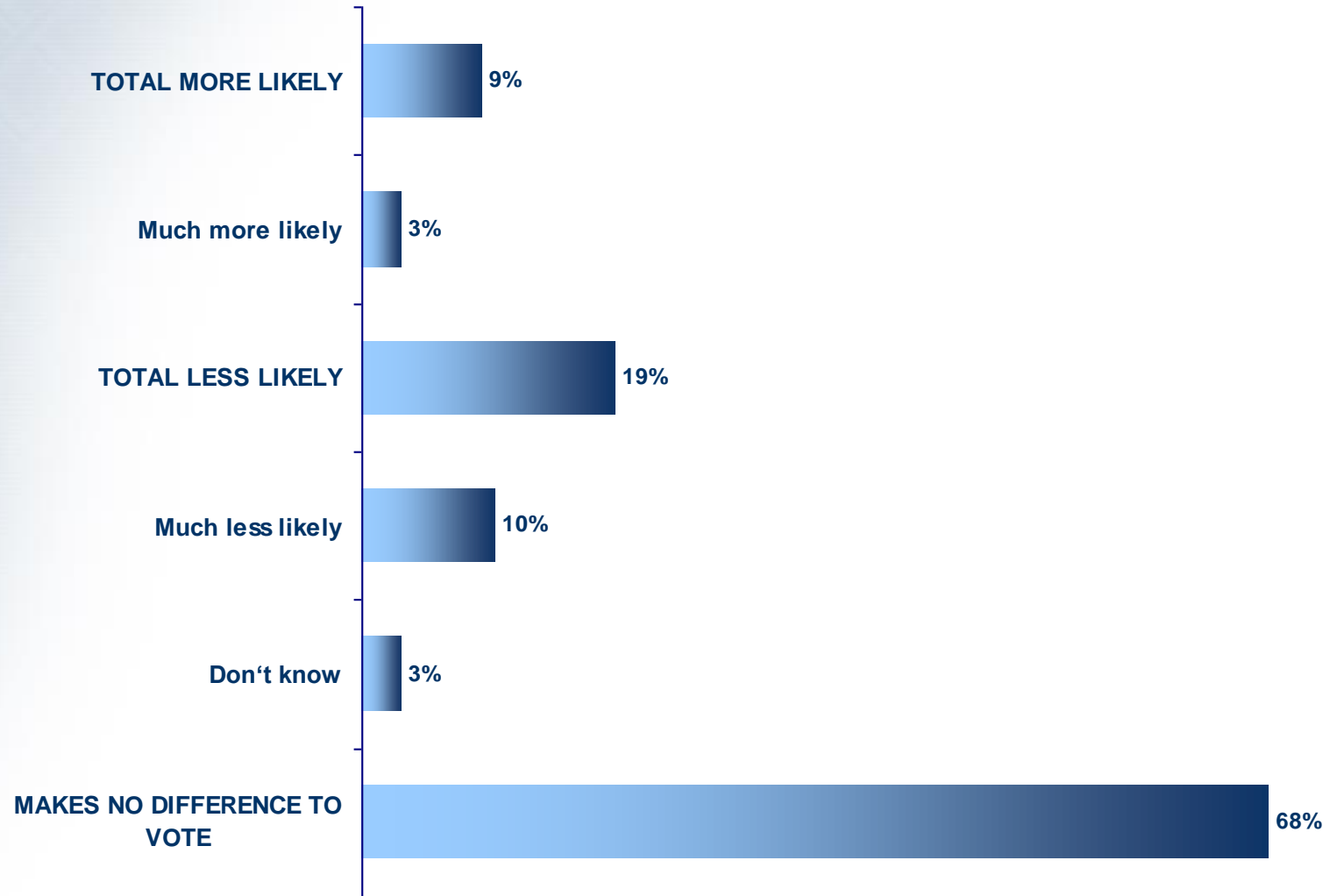
Q9) Sometimes people change their minds on a subject after they have heard some arguments for or against a proposal, so would you say that you support or oppose the provision of more full-range supermarkets in your local area?

# Opinion Driver Map: Regression





Over two thirds say this issue would make no difference to their vote, however those who say it impacts their vote negatively vs. positively are 2:1





# Strategic Summary

- Locally, top-of-mind concerns primarily relate to roads, and more specifically traffic congestion. Population and development is seemingly a factor in this.
- On a prompted basis, unemployment (esp. for young people) and with car parking rate highly as issues in addition to traffic and housing density.
- Supermarkets are perceived very favourably, including both Woolworths and Coles, and Woolworths is rated slightly higher than Coles as preferred store.
- When deciding on a supermarket, convenience and price are key determinants. This relates both to the proximity of the shopping centre as well as the accessibility and ease on site. Store size and product range also figure.
- Initially, opinion is somewhat split on support and opposition to a new supermarket, but a slight prejudice to support it turned into majority opposition after consideration of messaging. However, this is a low order vote driver.
- Current support is (and can be increasingly) driven by a focus on travel times, more choice and competition, and job opportunities, i.e. the benefits.
- A focus on this contextual alignment (in the context of more population growth) will help to offset the negative driver against new stores; that there is no need.

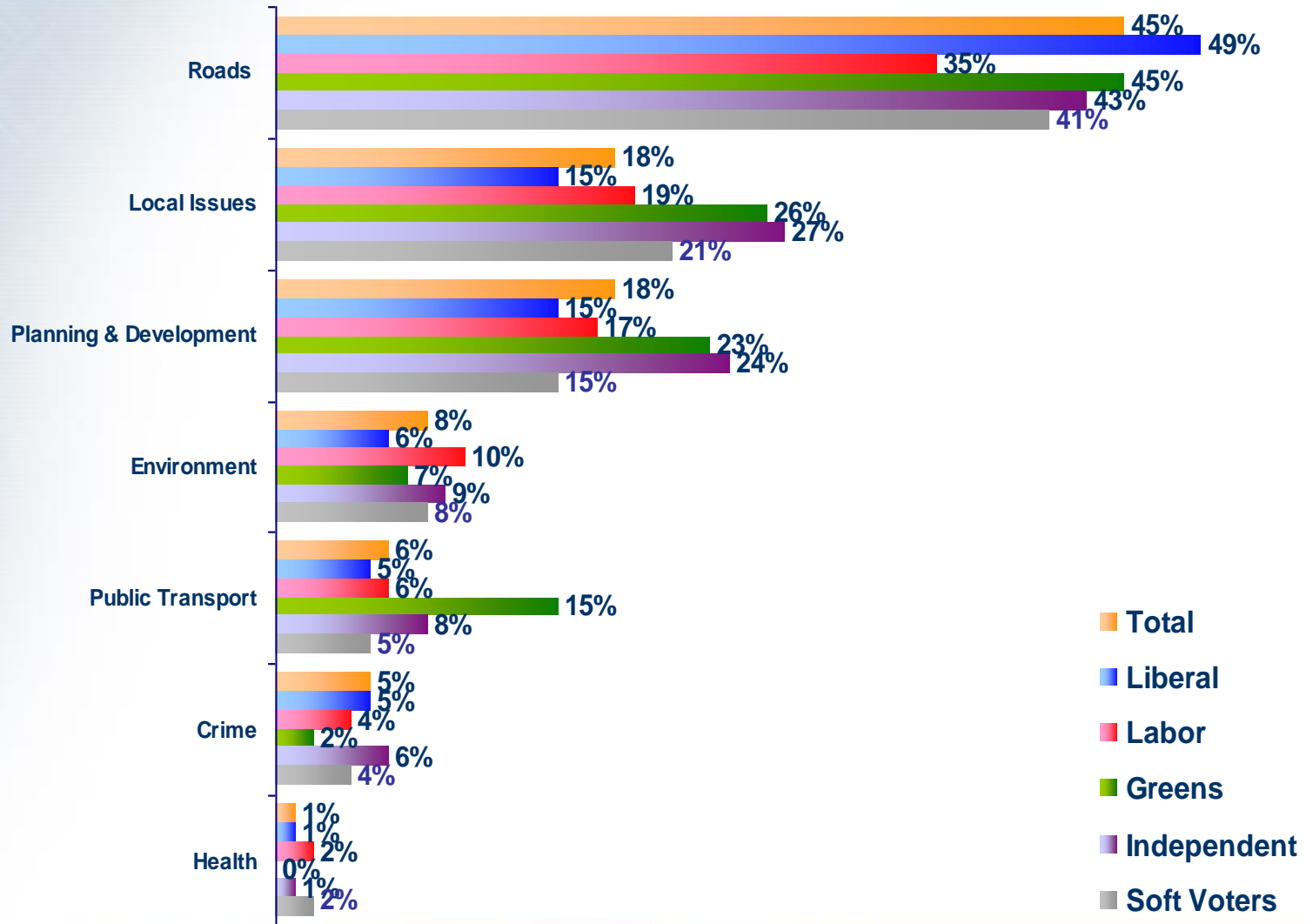


# Appendix



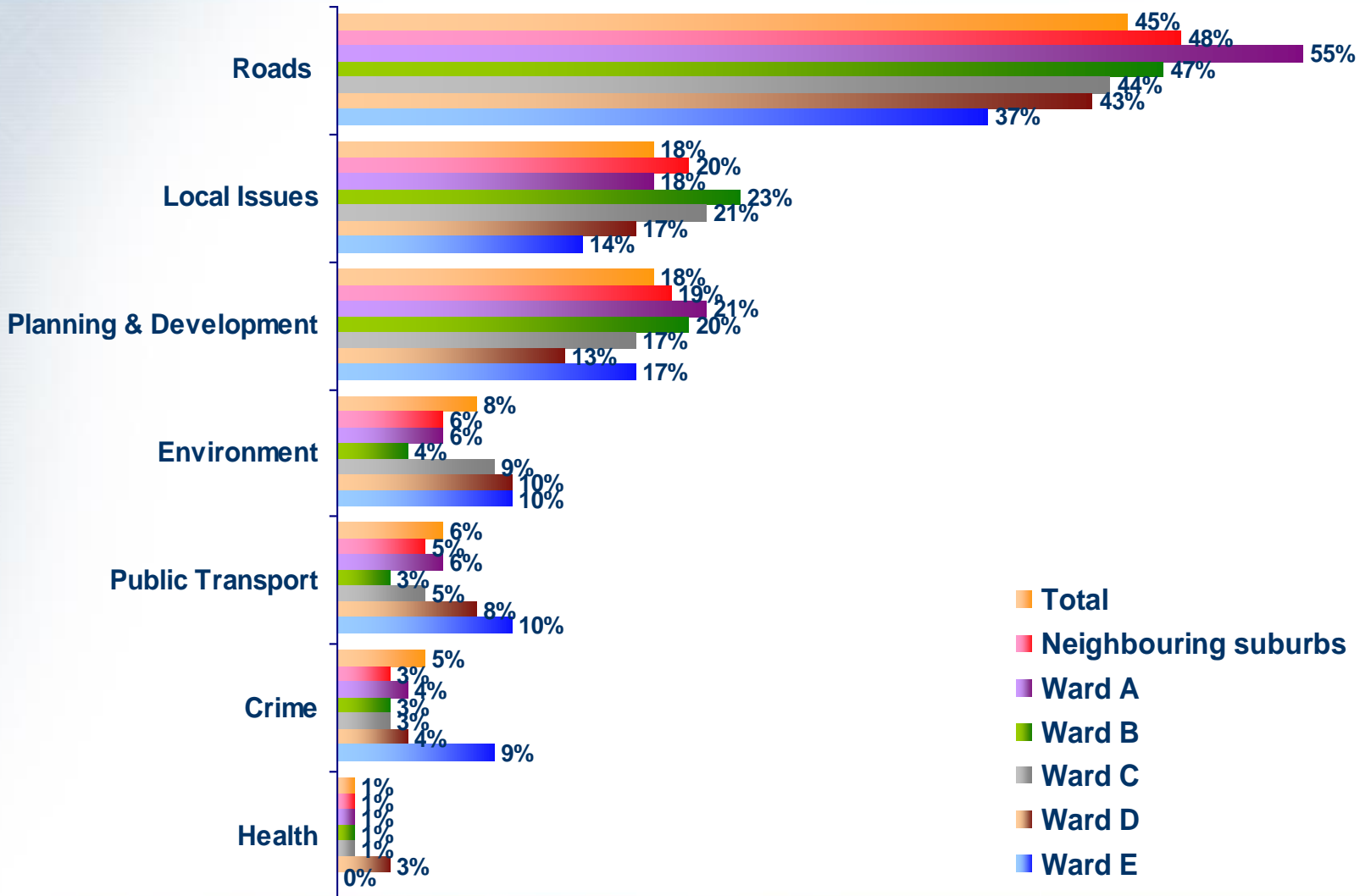
# The Context: Issue Agenda

# Unprompted issues of concern: Vote

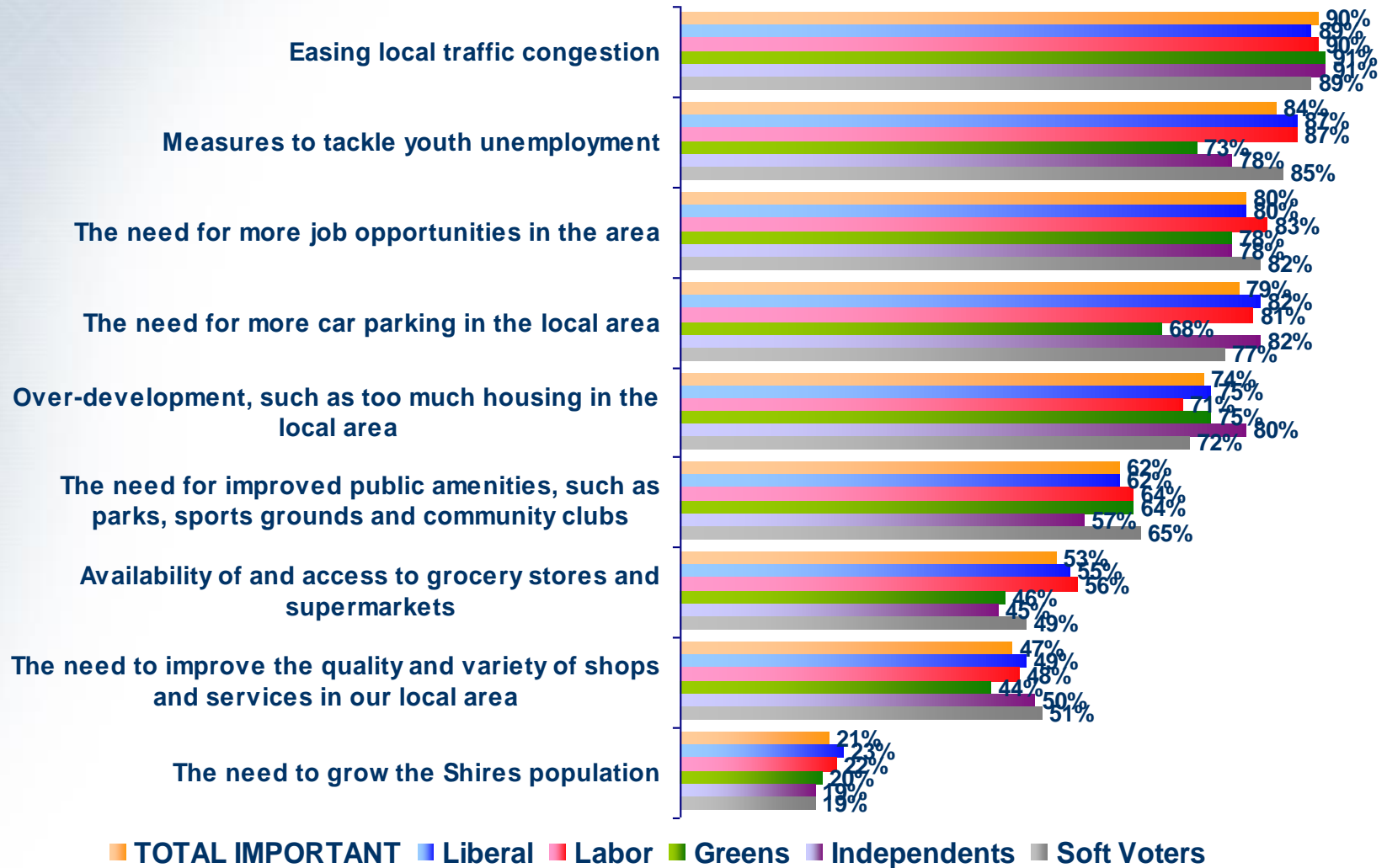




# Unprompted issues of concern: Area

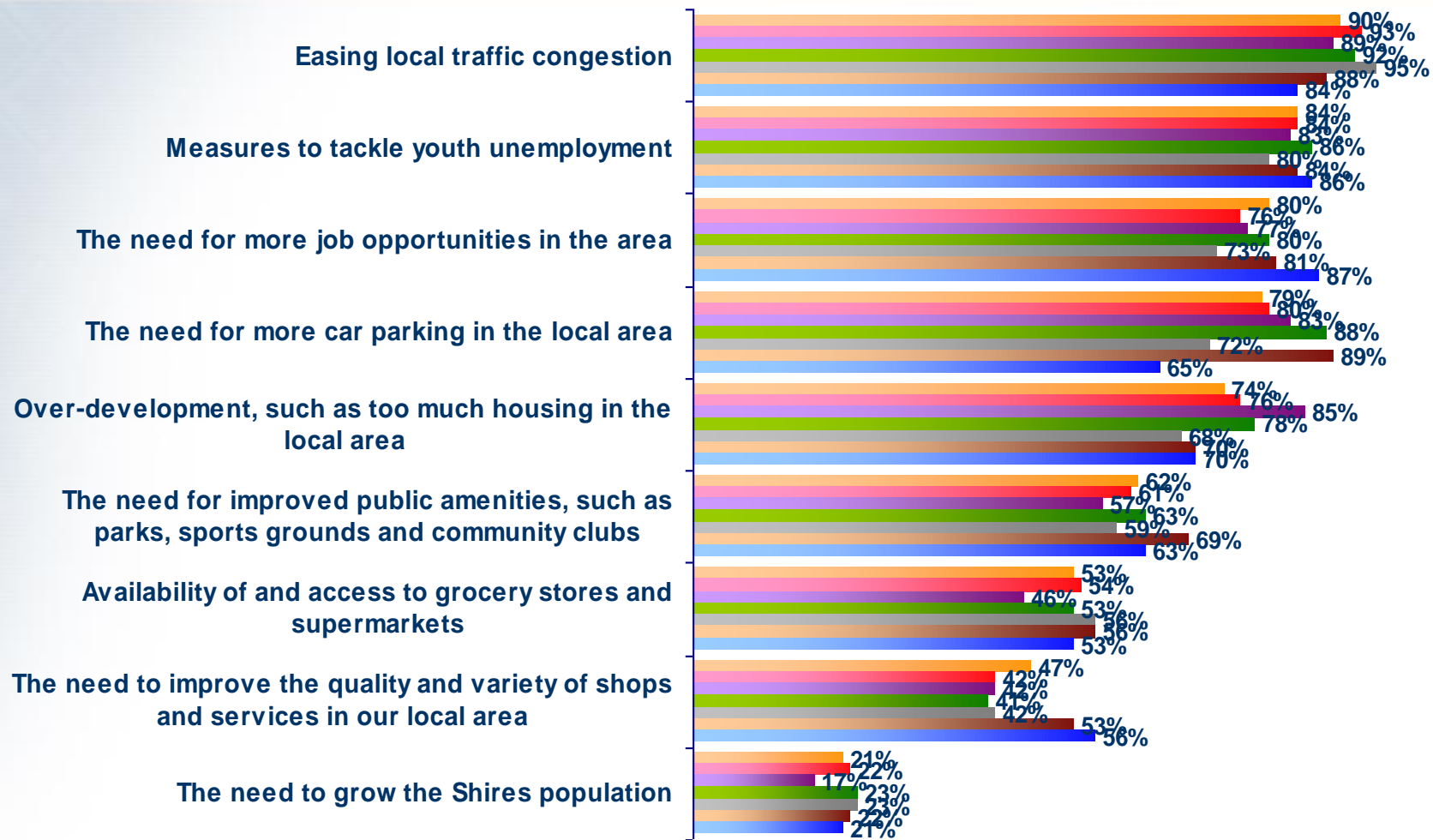


# Prompted issues of concern: Vote



Q2) Now I'm going to read you some local issues and situations other people we have surveyed have said are important to the local area. For each one I'd like you to tell me whether each is very important, somewhat important, not very important or not at all important.

# Prompted issues of concern: Area



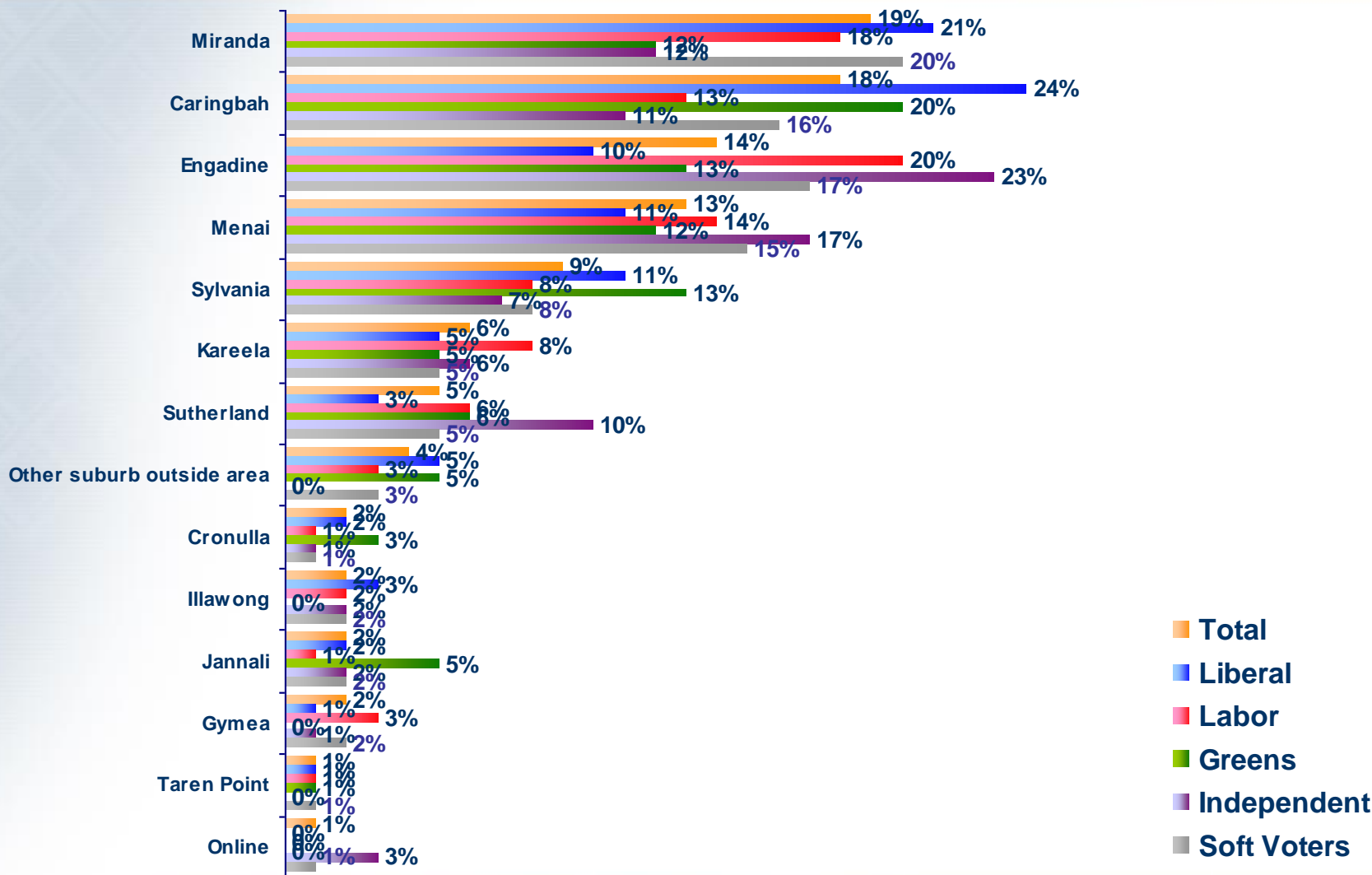
■ Total 
 ■ Neighbouring Suburbs 
 ■ Ward A 
 ■ Ward B 
 ■ Ward C 
 ■ Ward D 
 ■ Ward E



# Shopping Habits

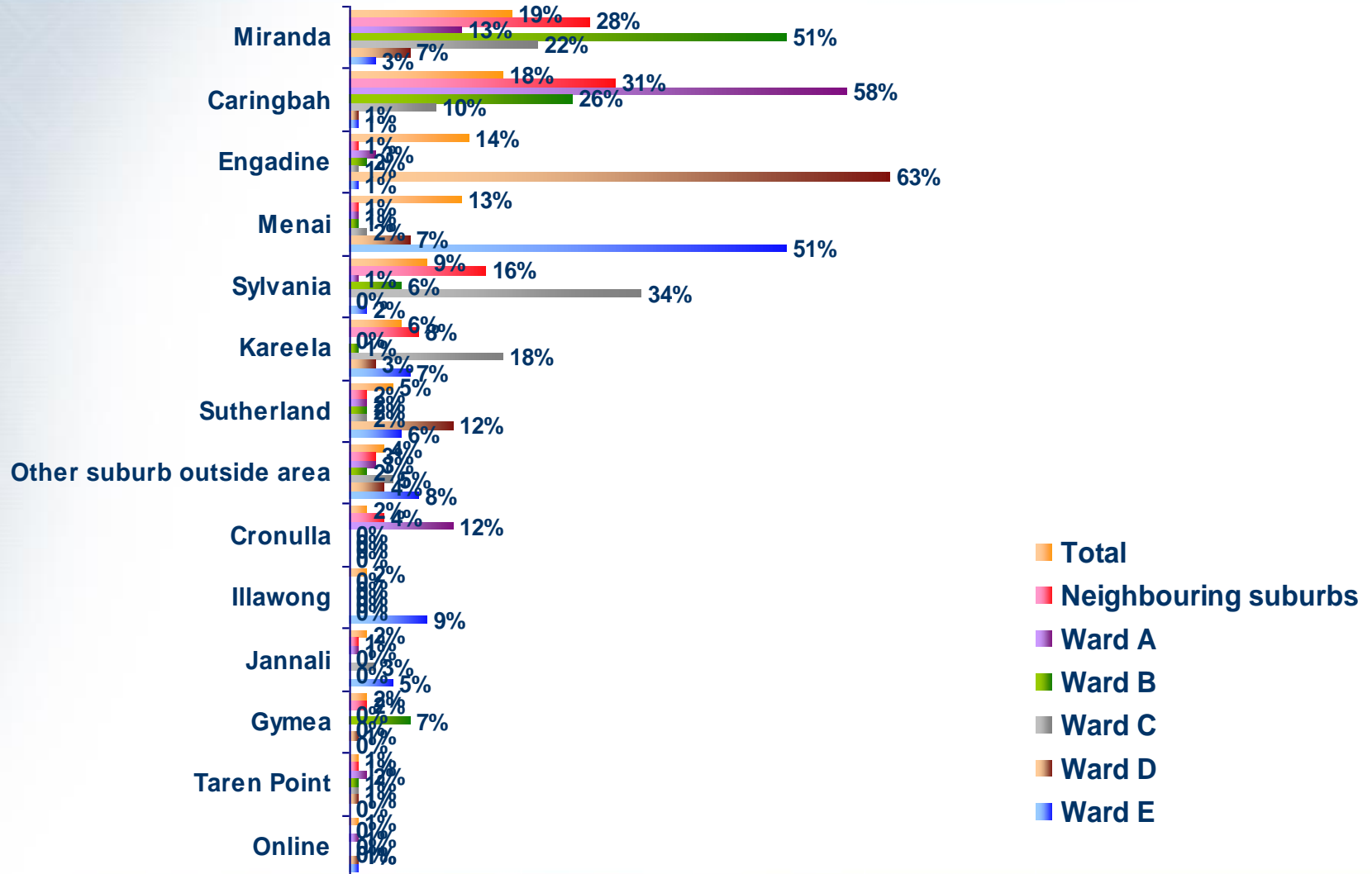


# Grocery shopping Suburb: Vote



Q7b) And in what suburb are you doing the majority of your grocery shopping?

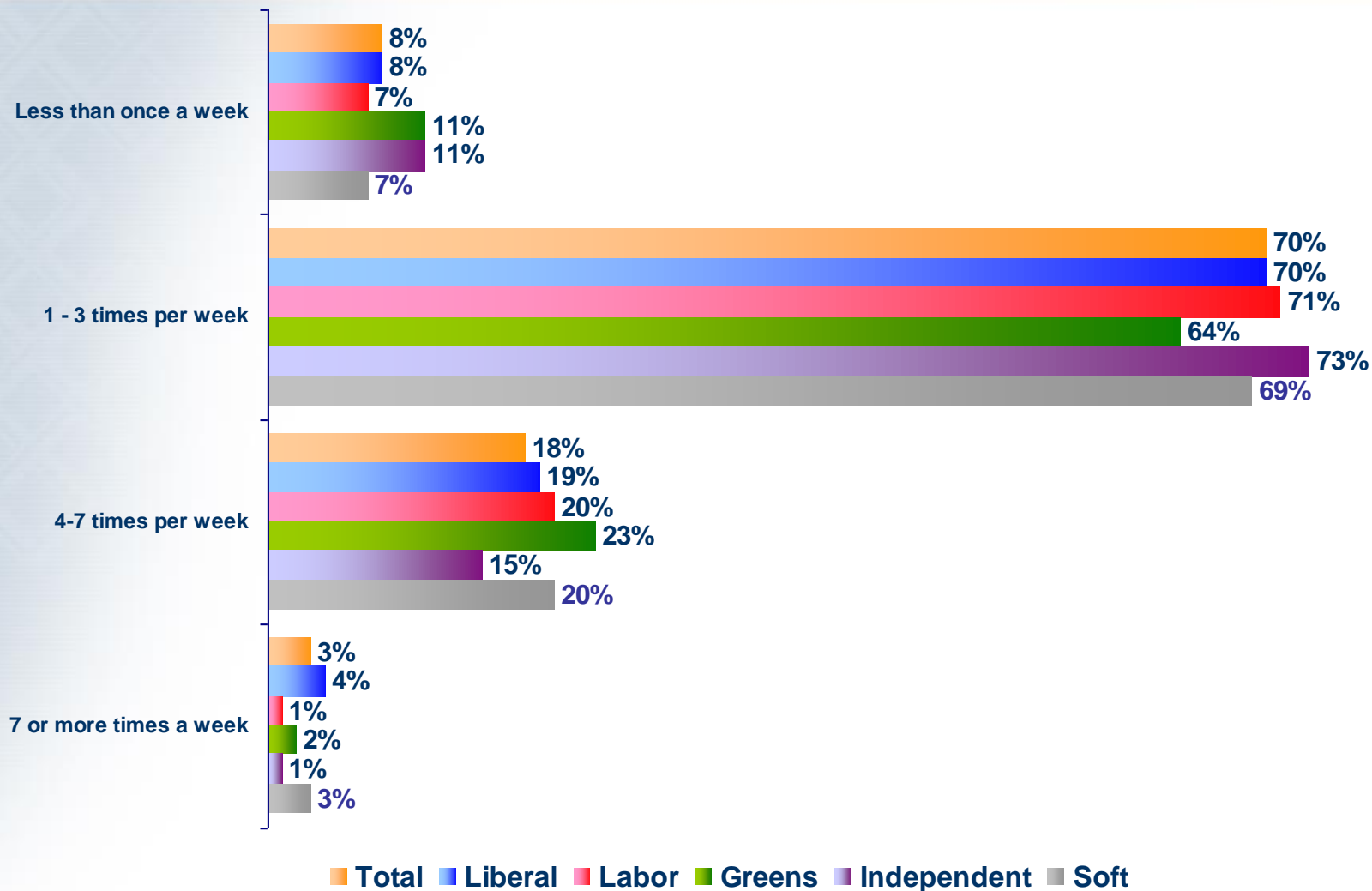
# Grocery shopping Suburb: Area



Q7b) And in what suburb are you doing the majority of your grocery shopping?

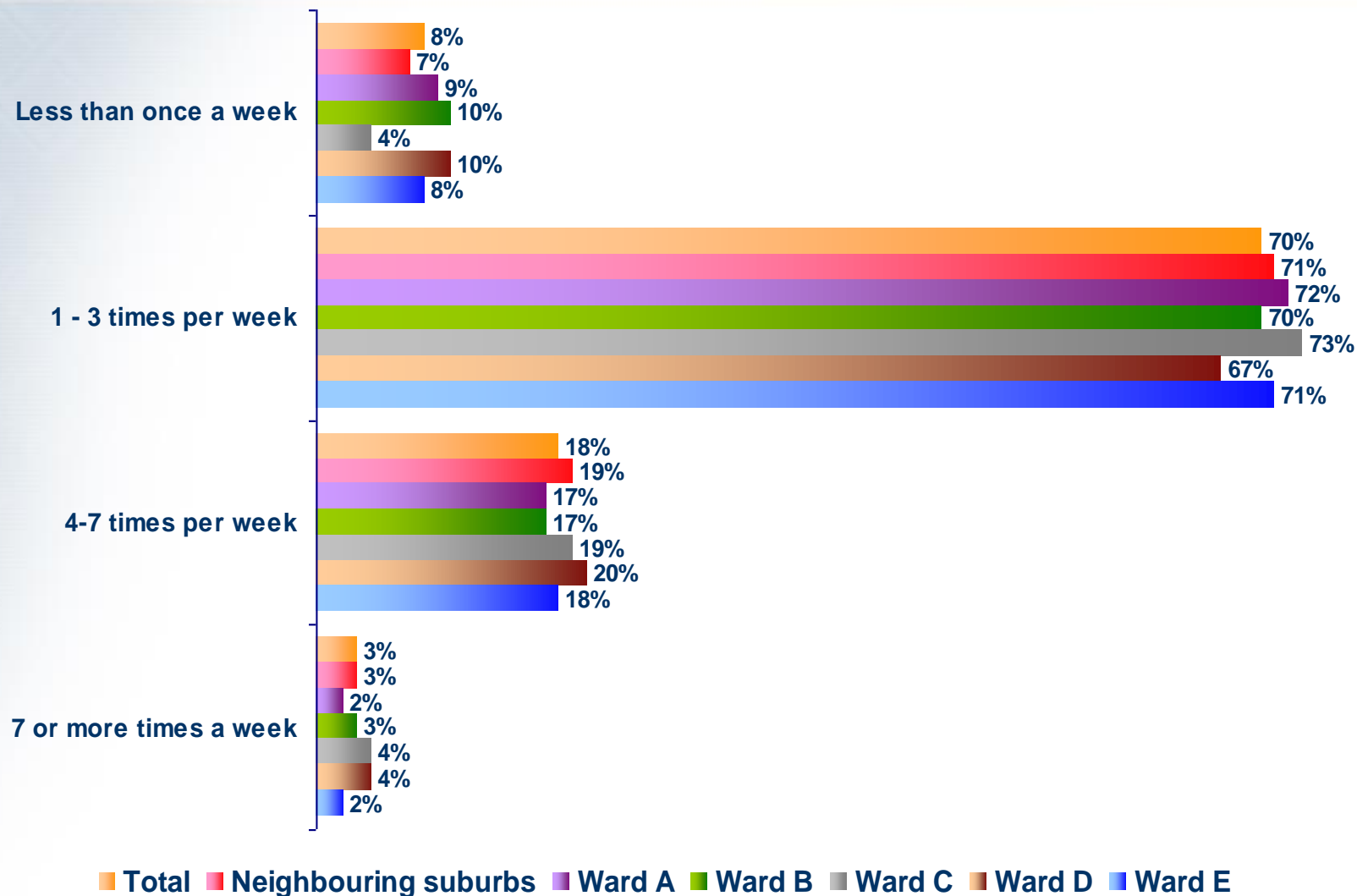


# Grocery shopping Frequency: Vote





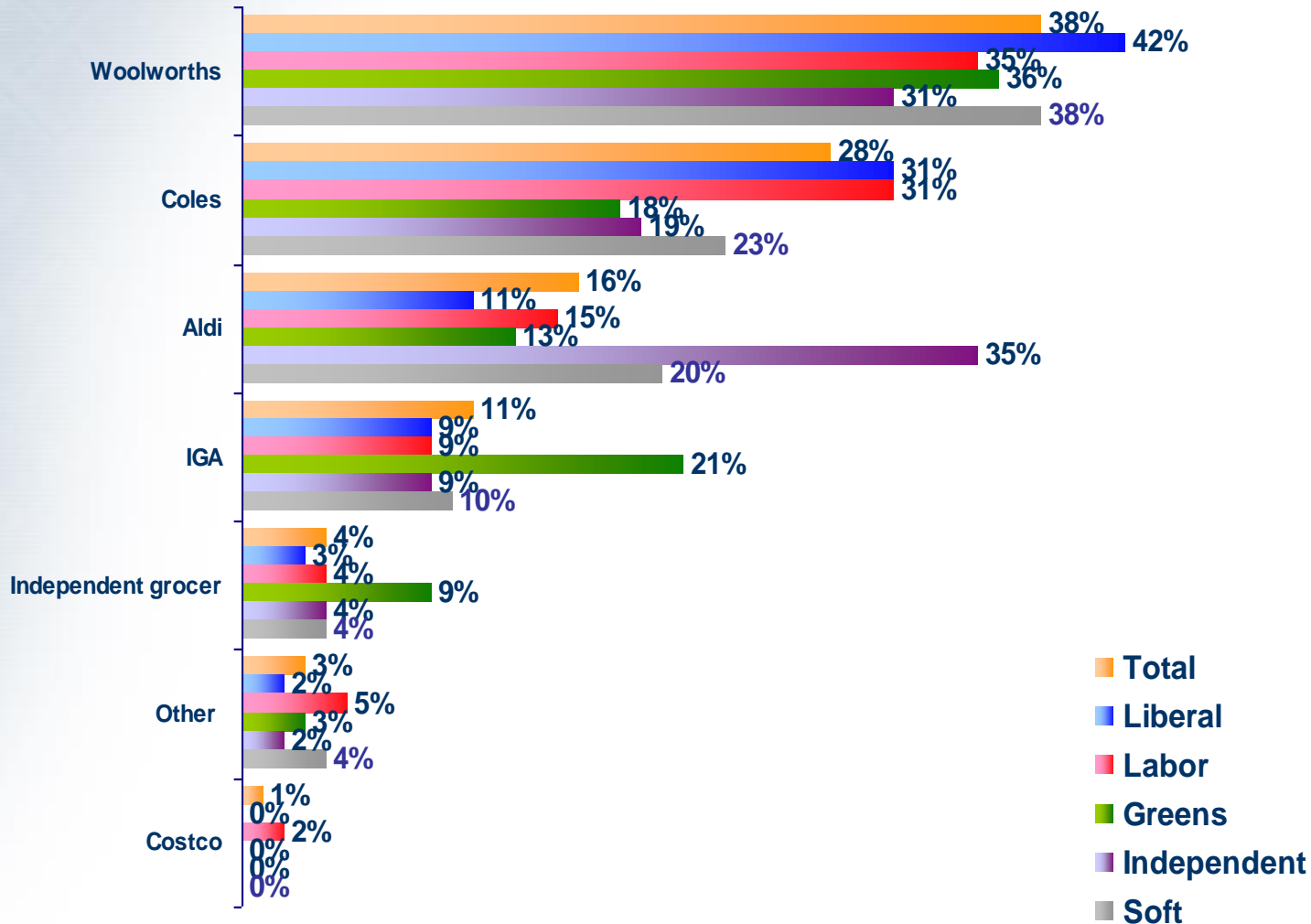
# Grocery shopping Frequency: Area





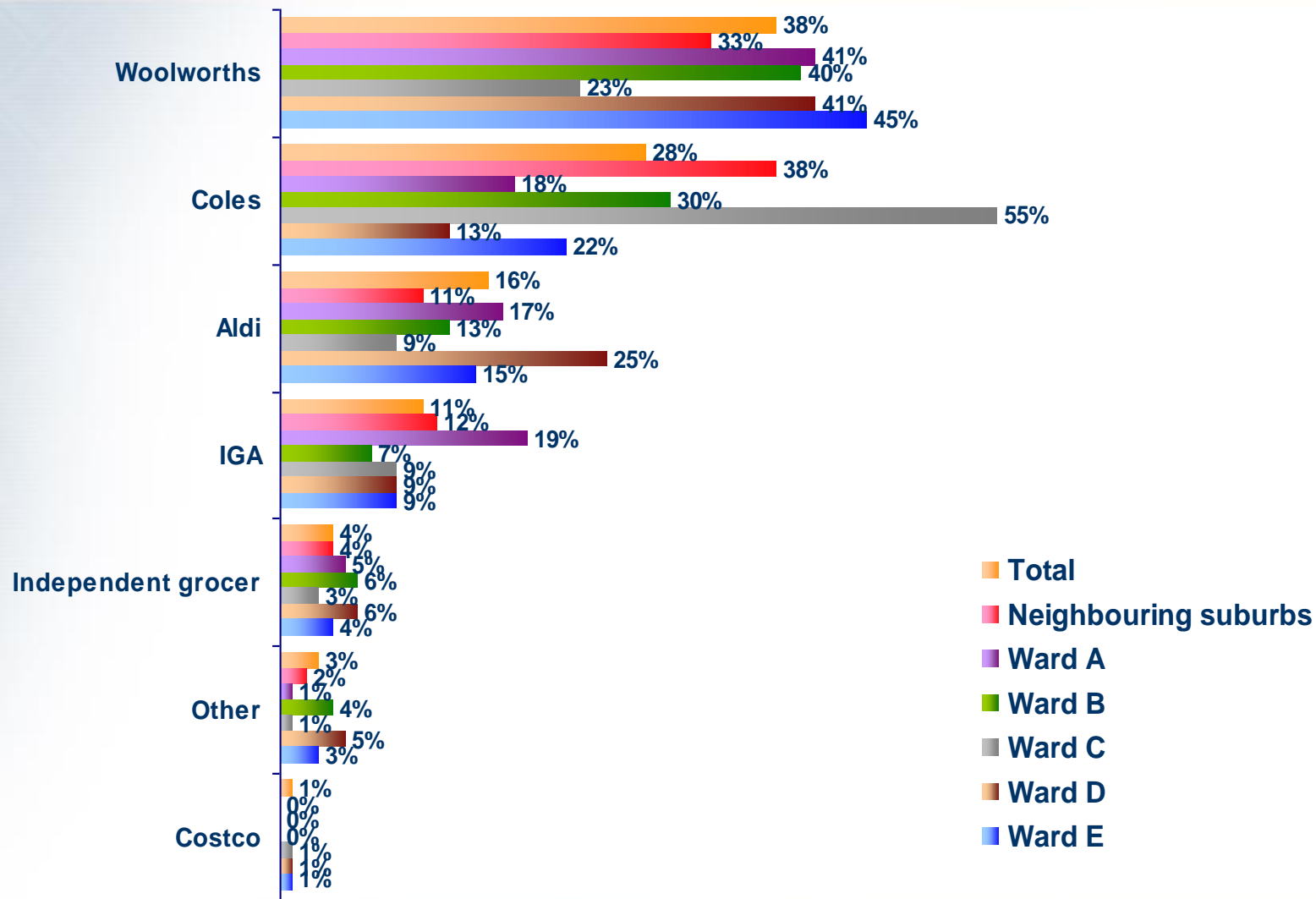


# Grocery shopping store: Vote



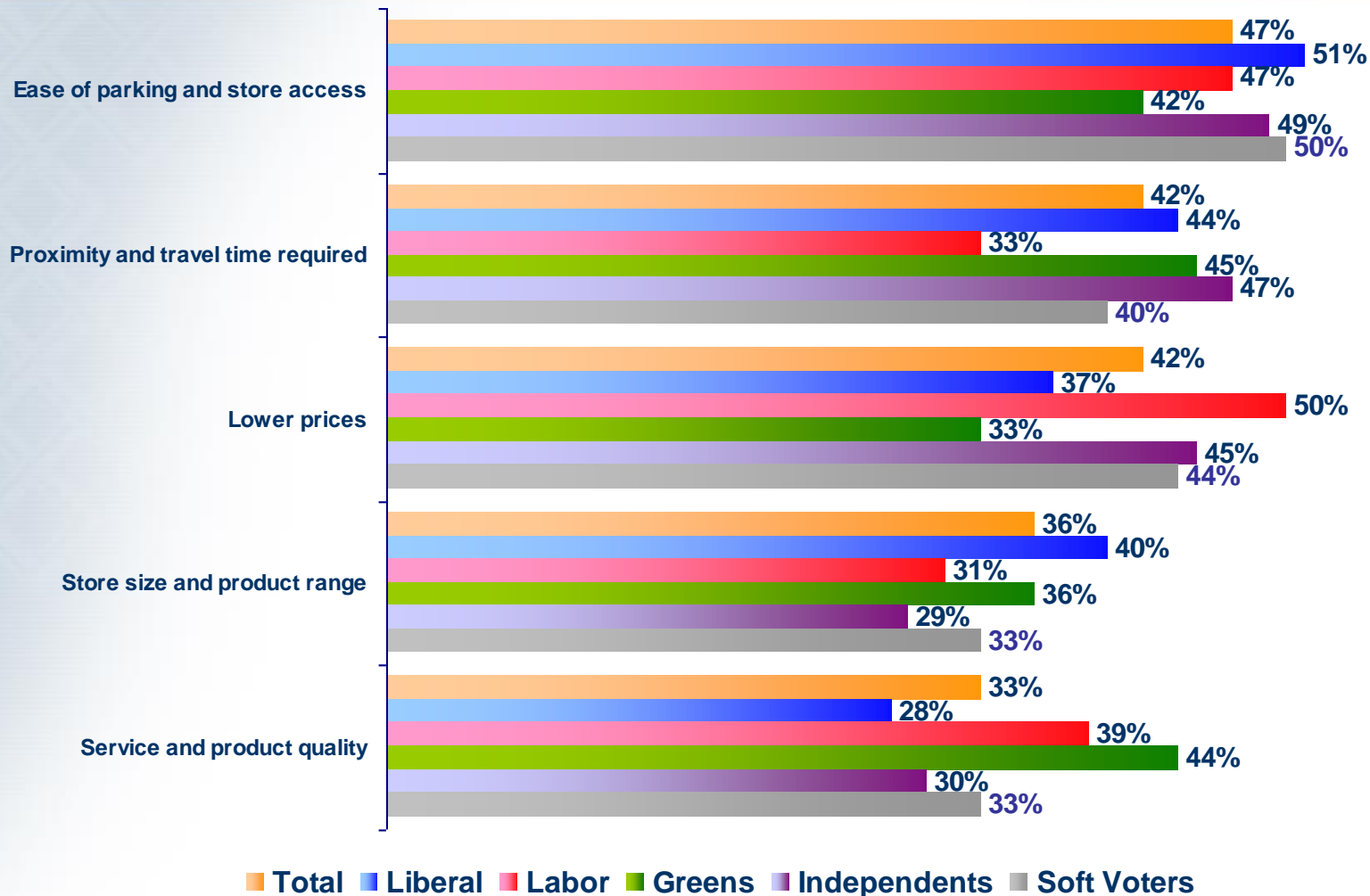


# Grocery shopping store: Area





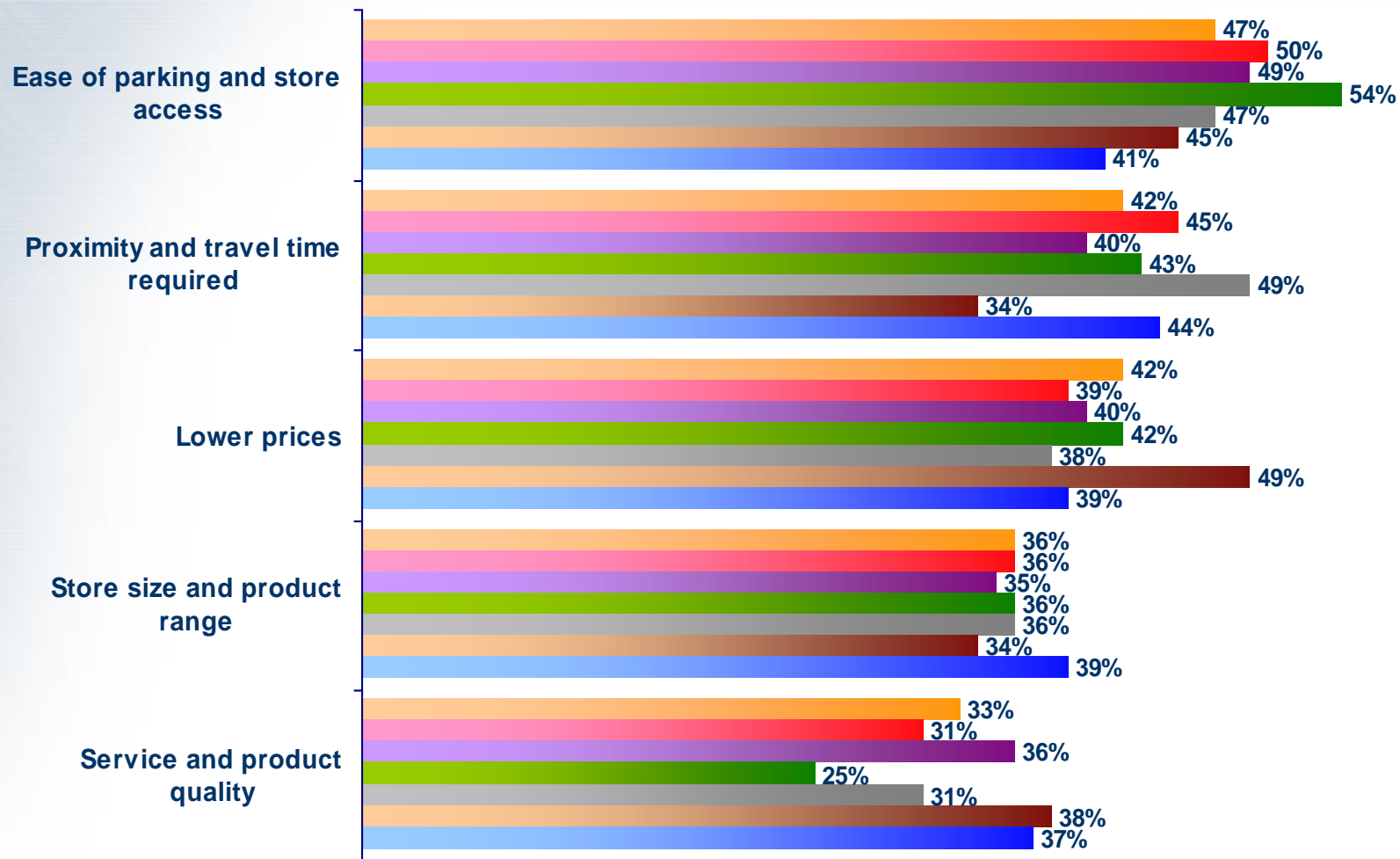
# Grocery shopping features: Vote



Q7e) Please rank the following as to which are the most important to you in deciding which local grocery store or supermarket you shop at.



# Grocery shopping features: Area



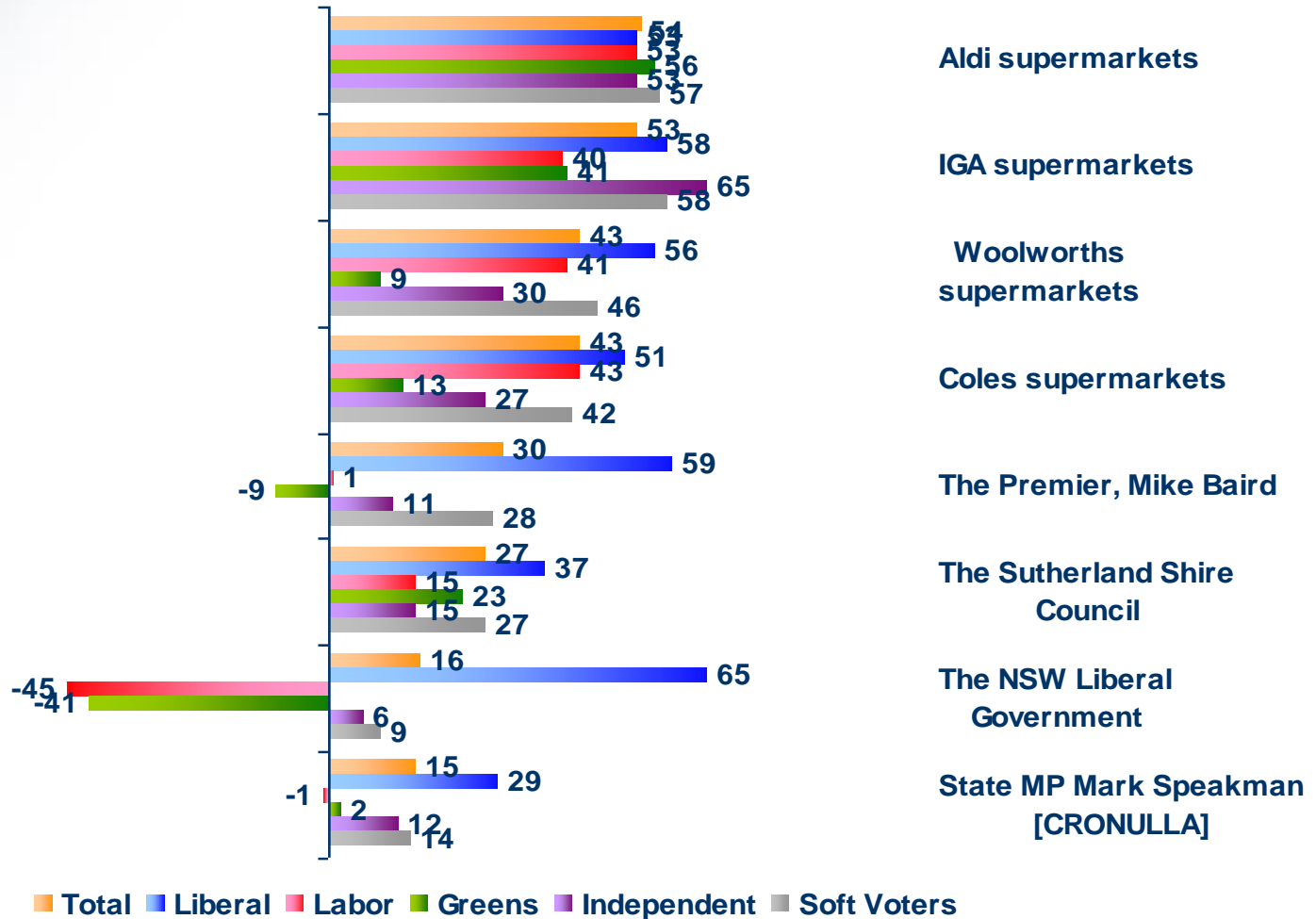
■ Total ■ Neighbouring Suburbs ■ Ward A ■ Ward B ■ Ward C ■ Ward D ■ Ward E



# Perceptions of Players: Figures & Organisations



# Net Favourability: Vote, 1/2

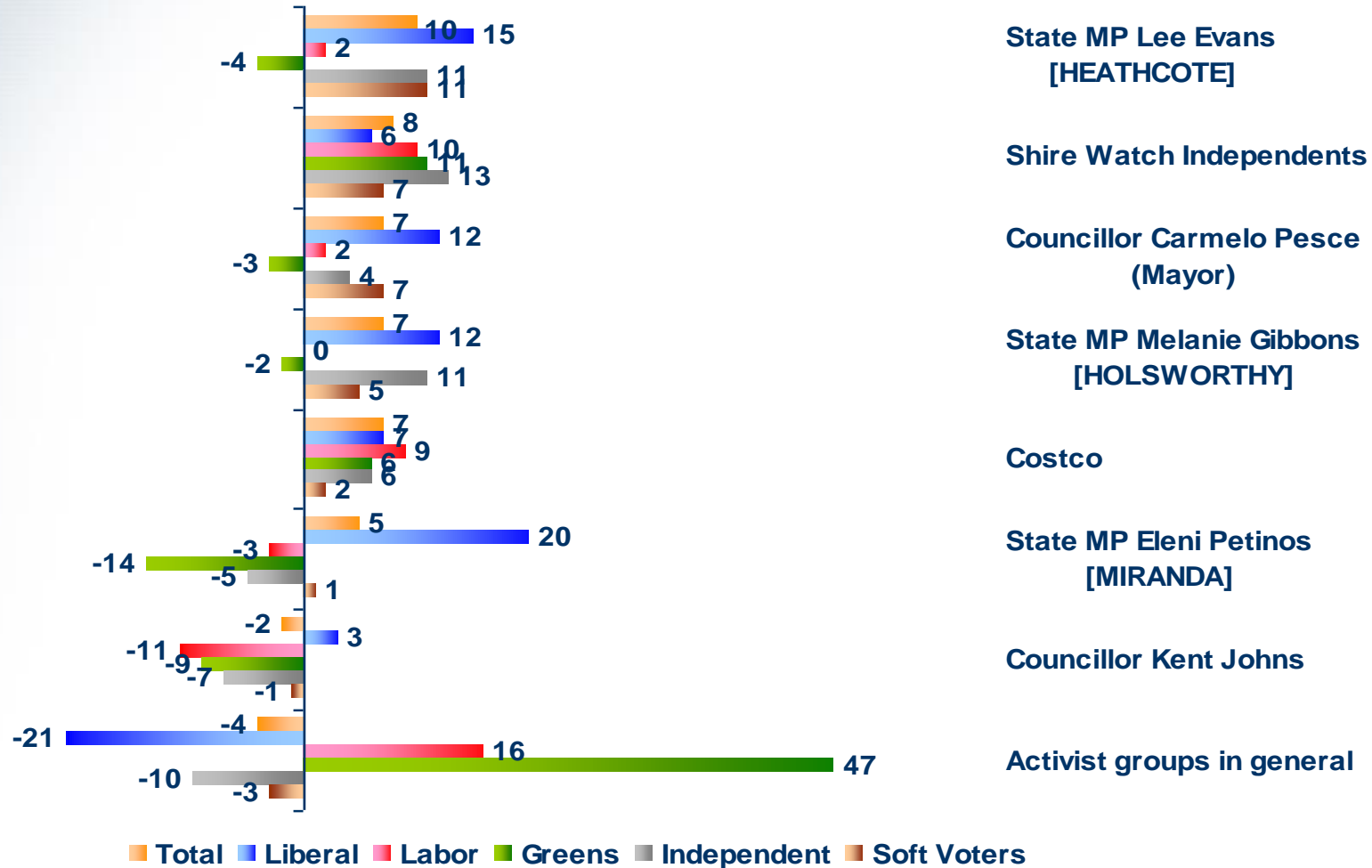


Net favourability = % Favourable - % Unfavourable

Q3) Now I'm going to read you some local issues and situations other people we have surveyed have said are important to the local area. For each one I'd like you to tell me whether each is very important, somewhat important, not very important or not at all important.



# Net Favourability: Vote, 2/2

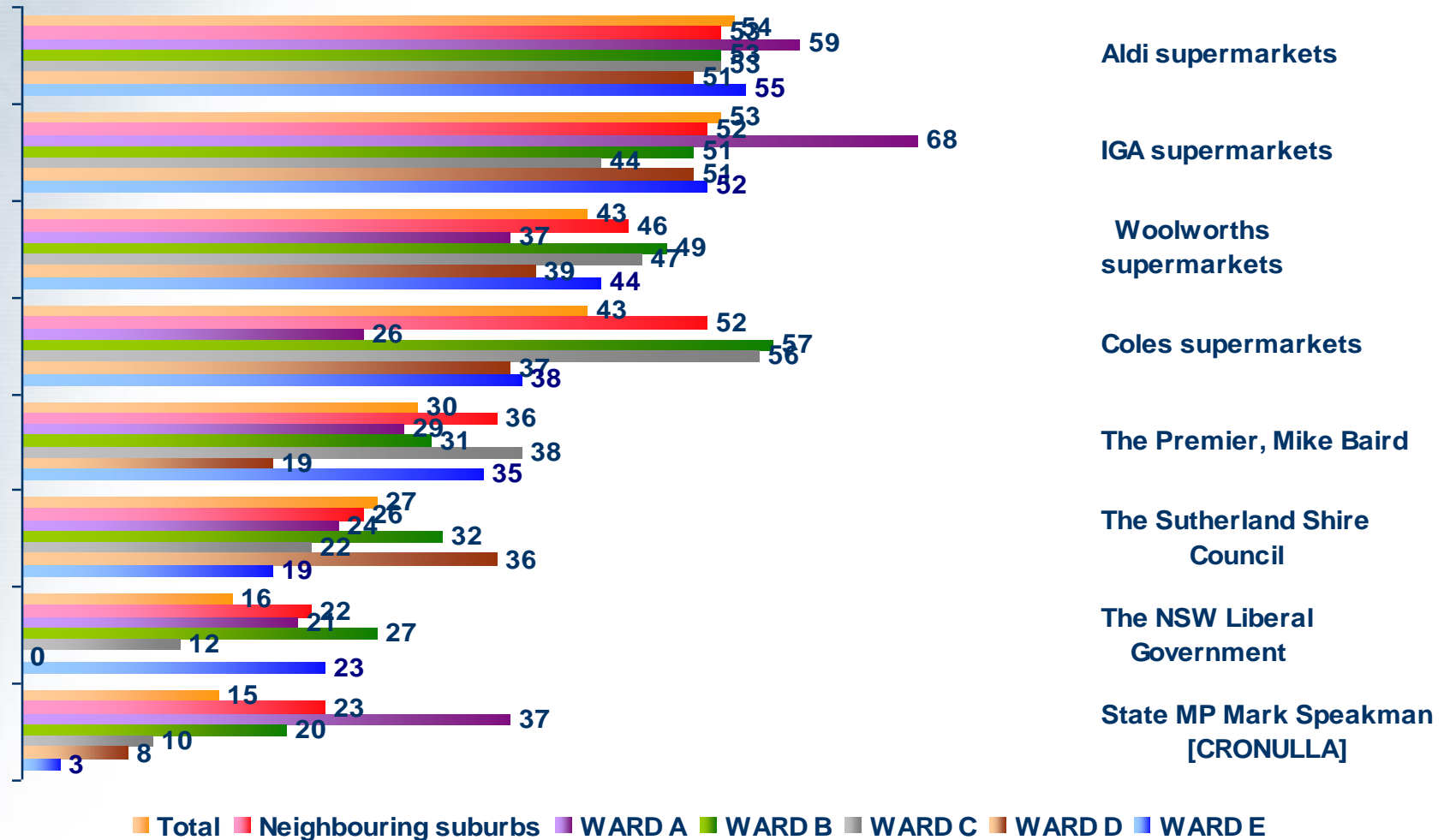


Net favourability = % Favourable - % Unfavourable

Q3) Now I'm going to read you some local issues and situations other people we have surveyed have said are important to the local area. For each one I'd like you to tell me whether each is very important, somewhat important, not very important or not at all important.



# Net favourability: Area, 1/2



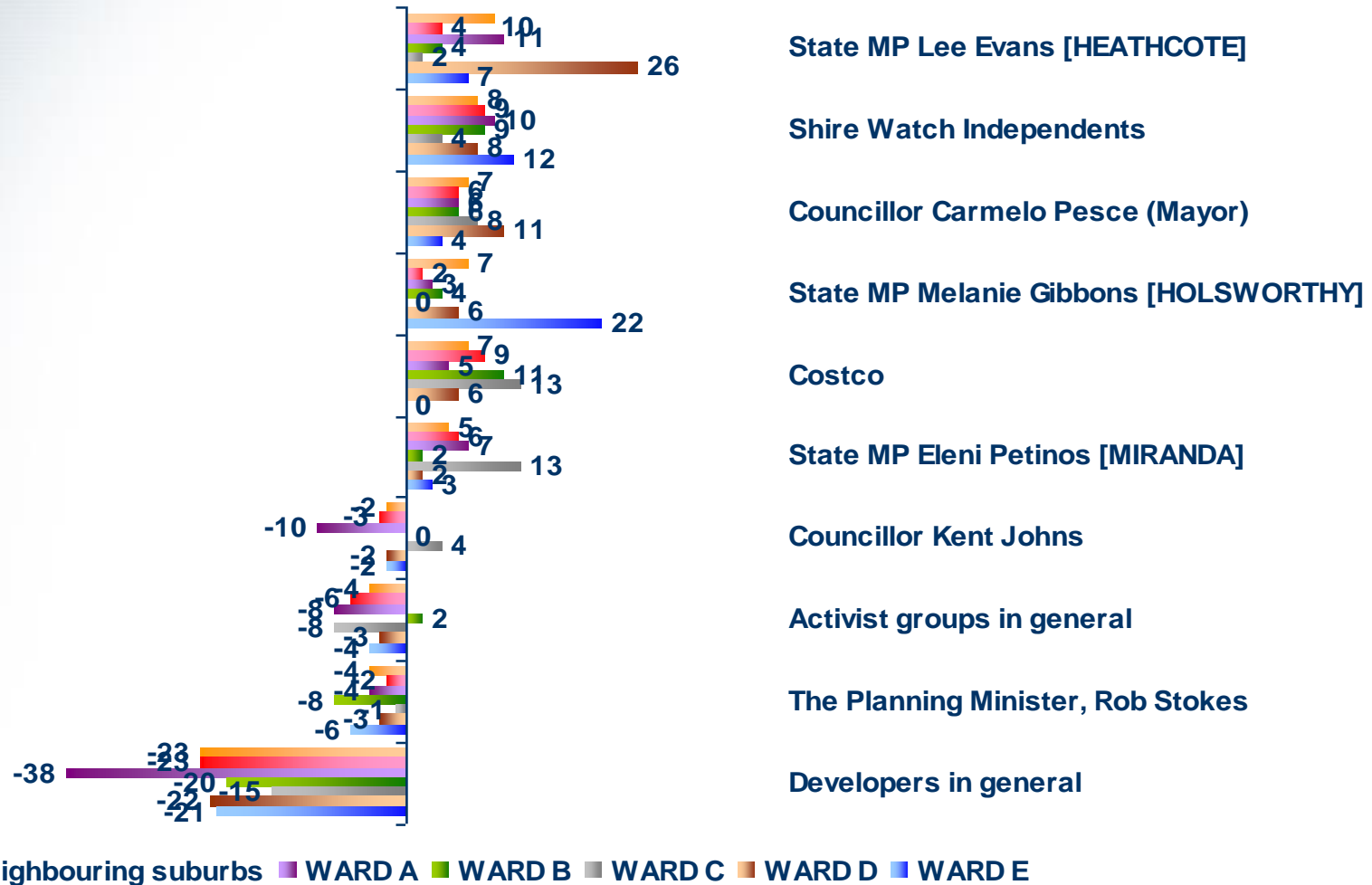
Net favourability = % Favourable - % Unfavourable

Q3) Now I'm going to read you some local issues and situations other people we have surveyed have said are important to the local area. For each one I'd like you to tell me whether each is very important, somewhat important, not very important or not at all important.





# Net favourability: Area 2/2



Net favourability = % Favourable - % Unfavourable

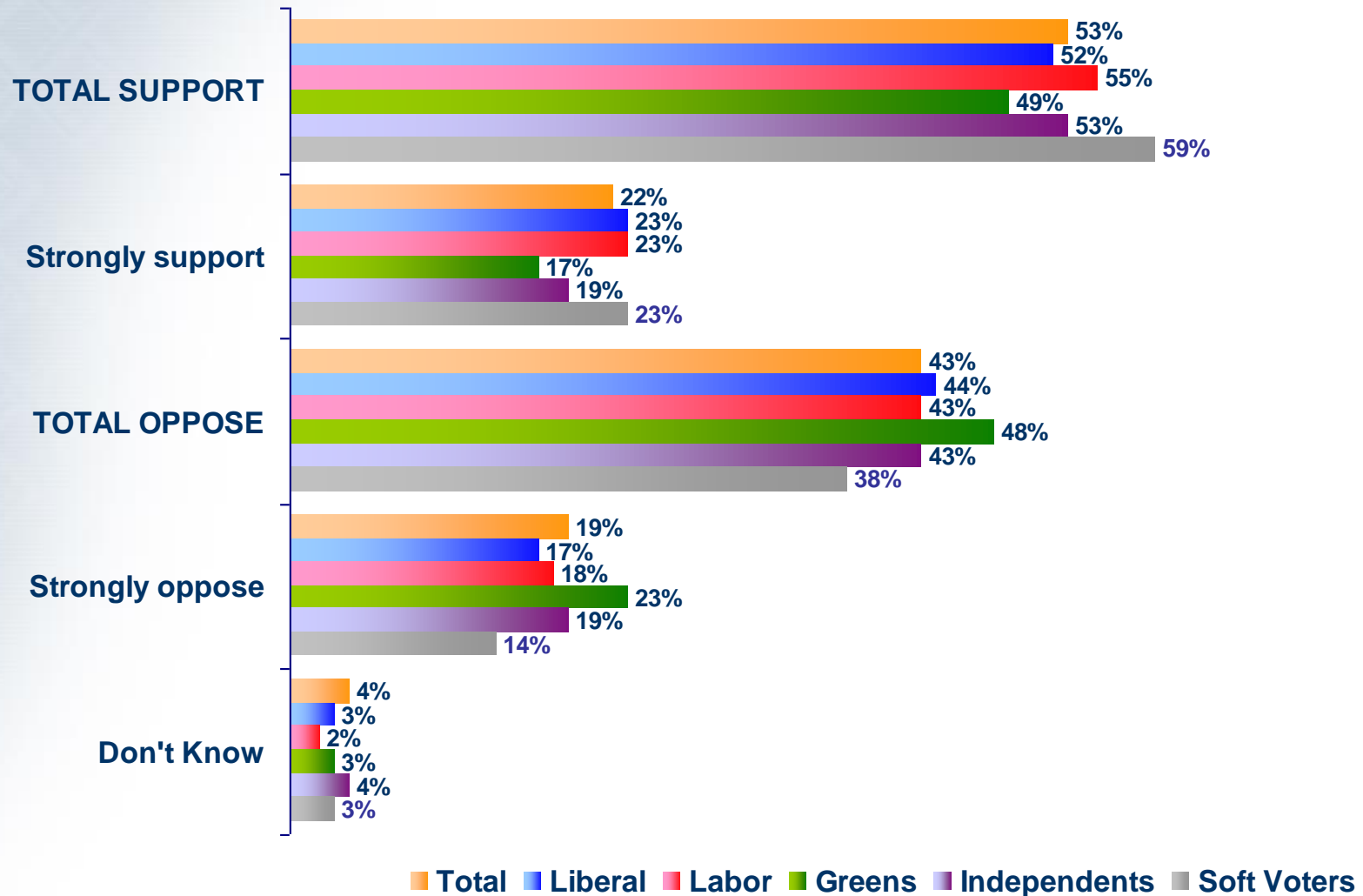
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# The Current Position: Opinion & Messaging



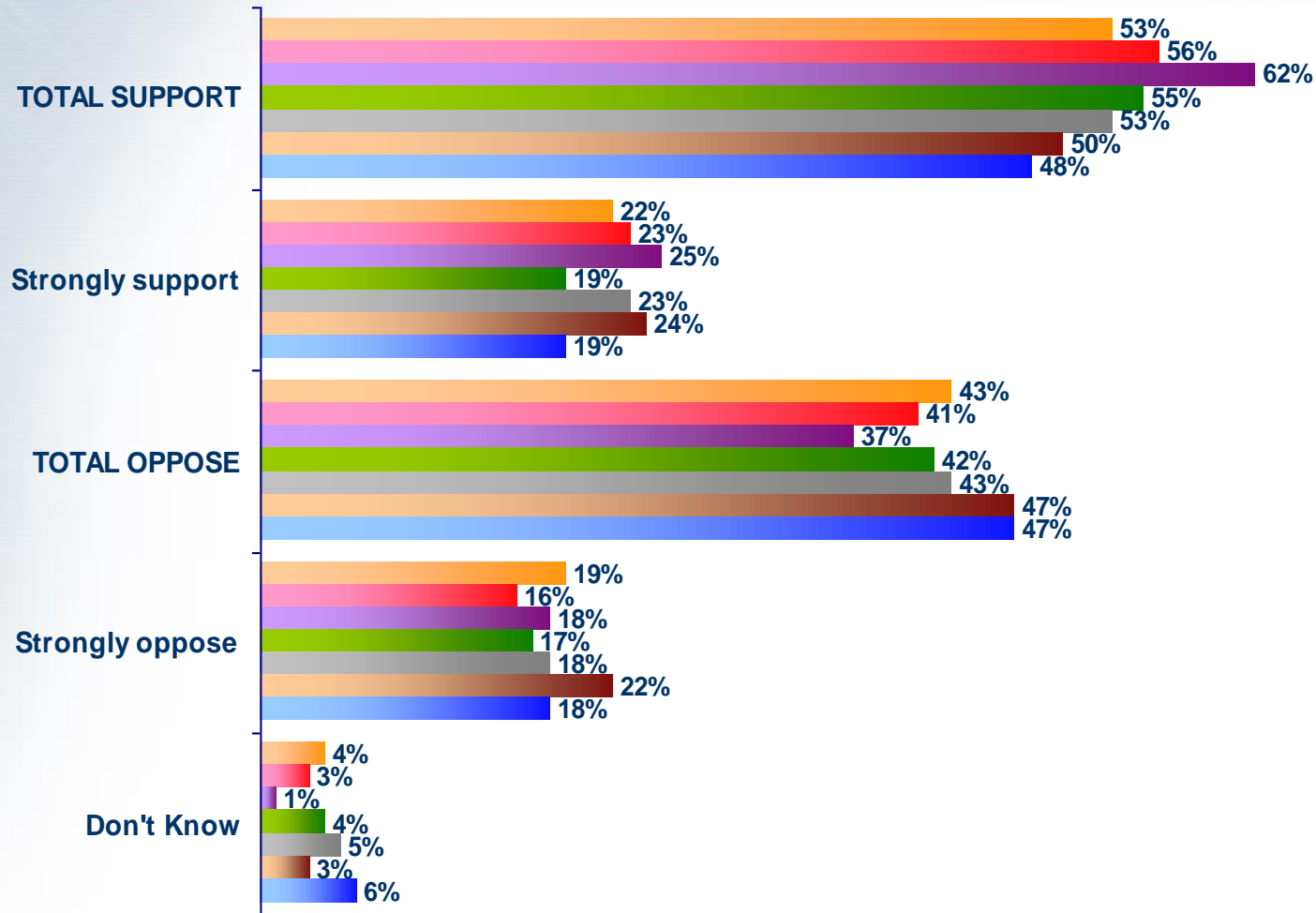
# Initial support full range markets: Vote



Q7f) Based on your experiences of shopping in the Shire, would you support or oppose the provision of more full range supermarkets in your local area?



# Initial support full range markets: Area



■ Total ■ Neighbouring Suburbs ■ Ward A ■ Ward B ■ Ward C ■ Ward D ■ Ward E

# Prompted supermarket and shopping issues: Vote, 1/2

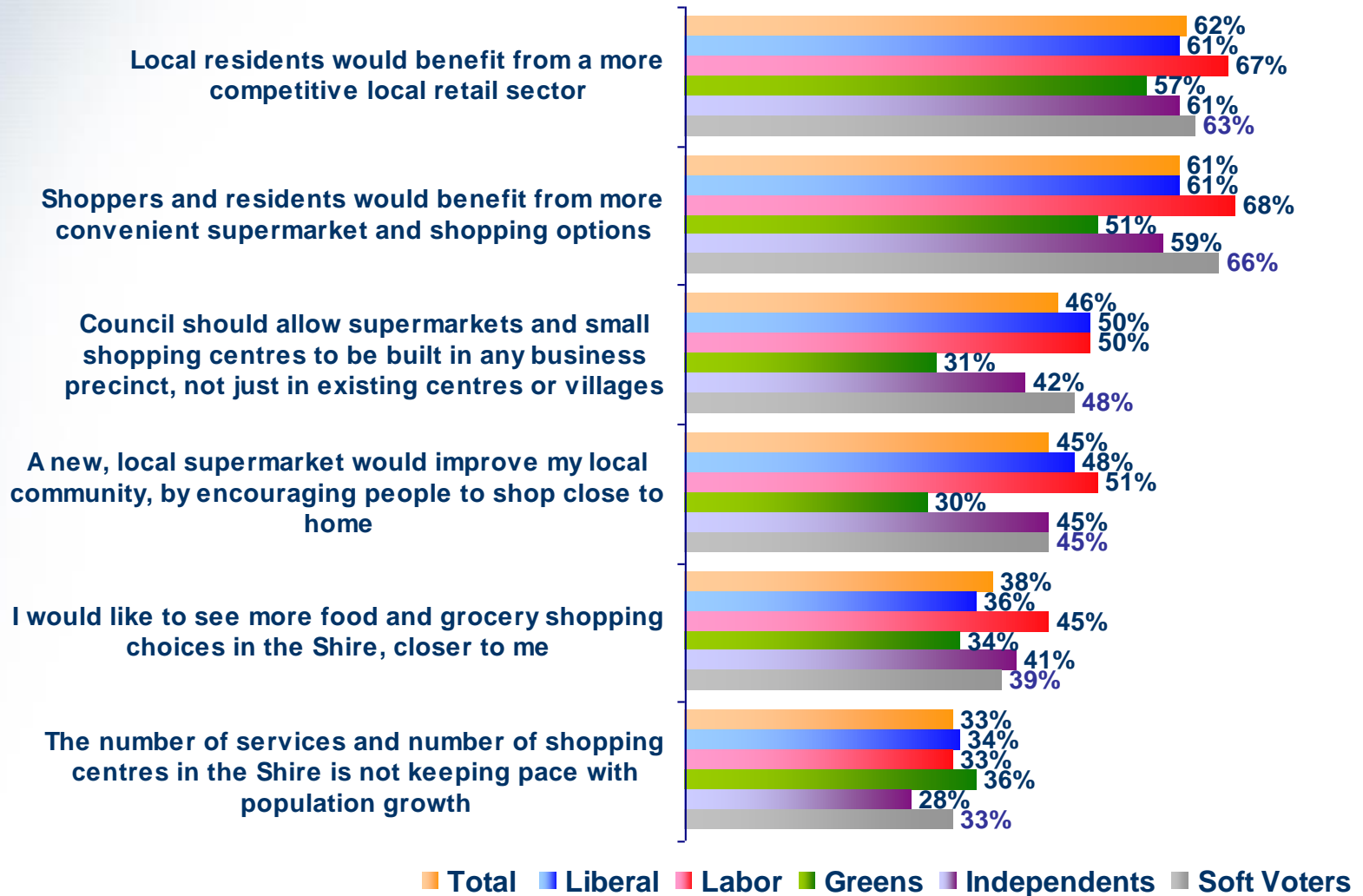


■ Total 
 ■ Liberal 
 ■ Labor 
 ■ Greens 
 ■ Independents 
 ■ Soft Voters

# Prompted supermarket and shopping issues: Vote, 2/2



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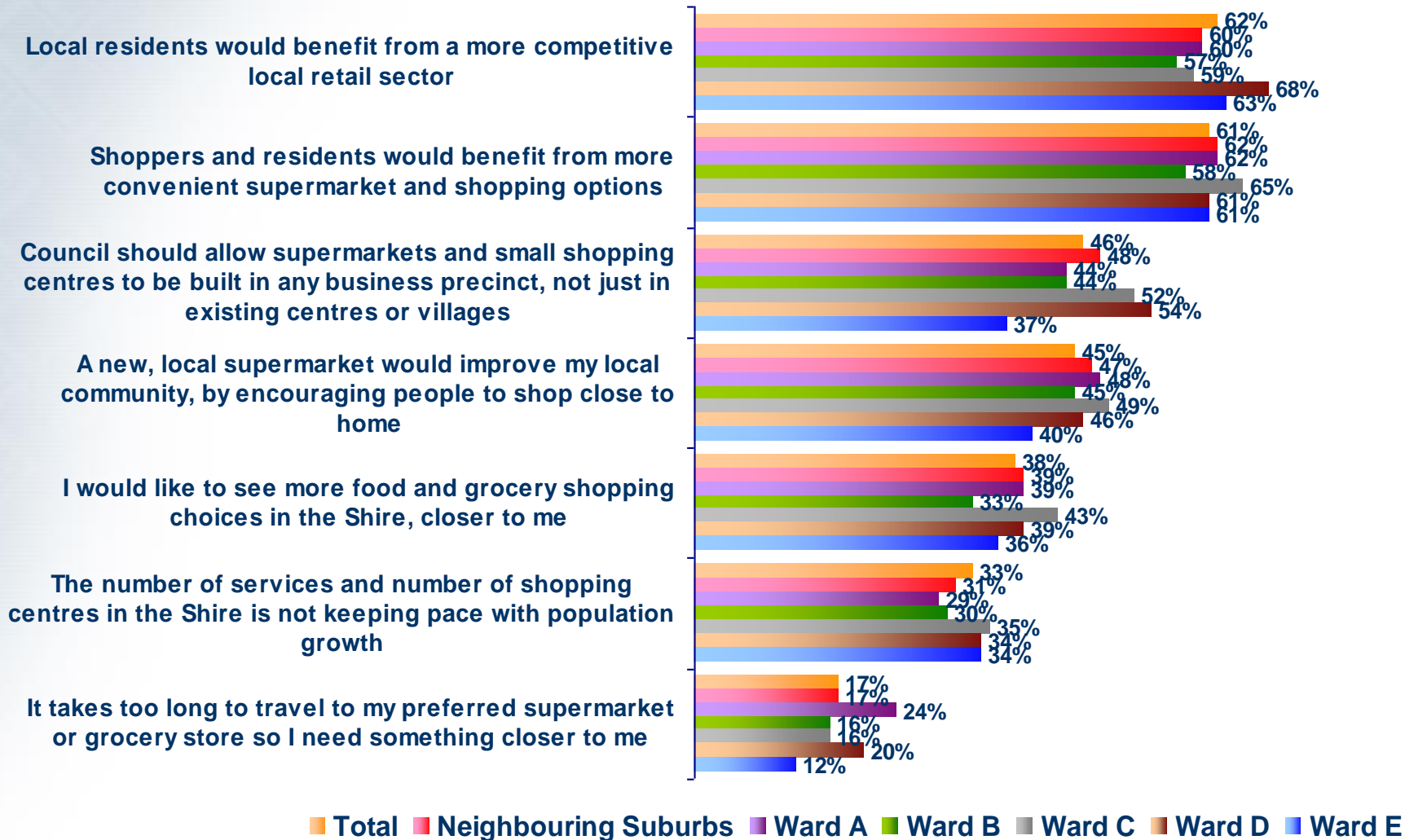


# Prompted supermarket and shopping issues: Area, 1/2



■ Total 
 ■ Neighbouring Suburbs 
 ■ Ward A 
 ■ Ward B 
 ■ Ward C 
 ■ Ward D 
 ■ Ward E

# Prompted supermarket and shopping issues: Area, 2/2



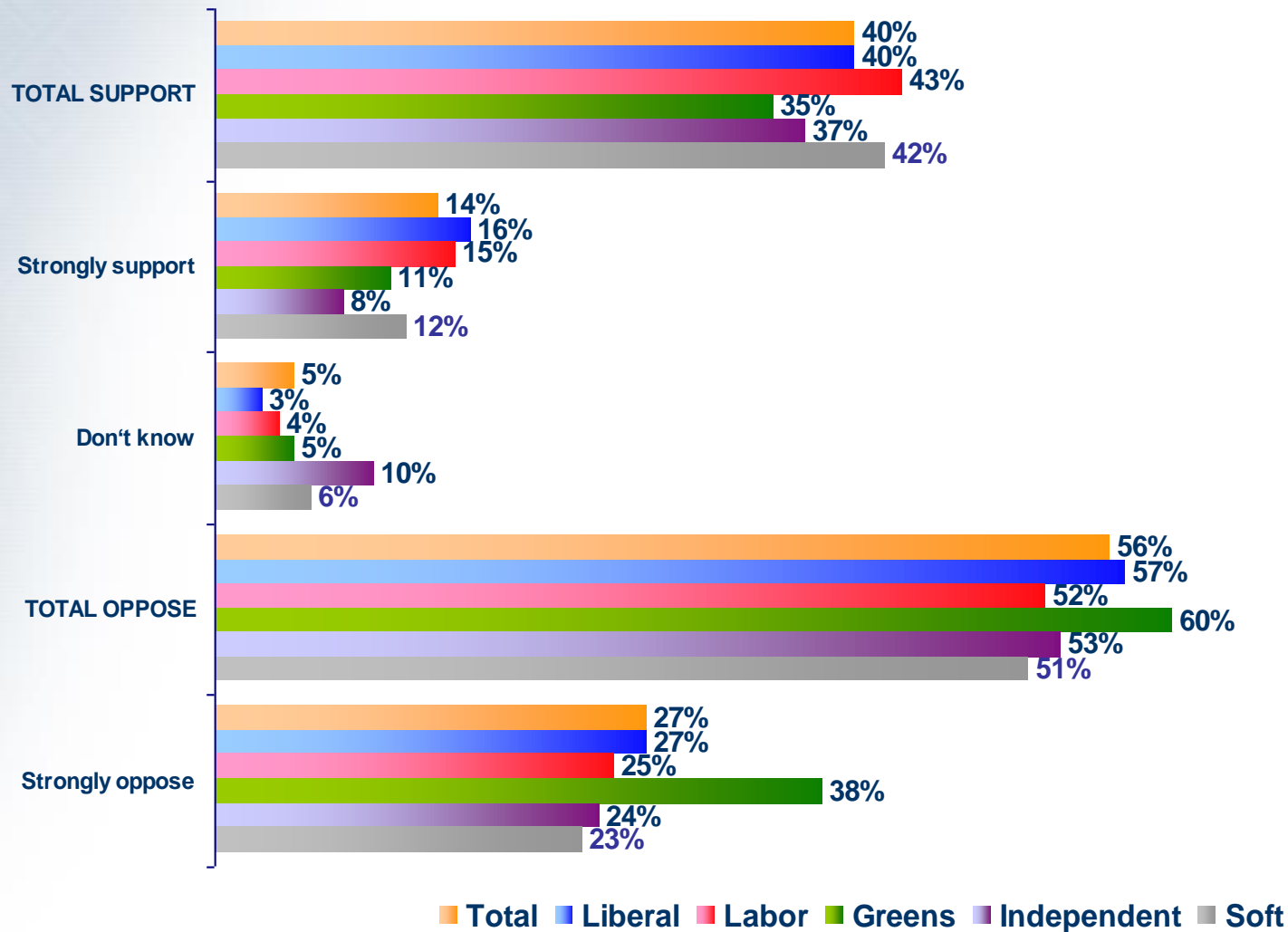




# Considered Opinion



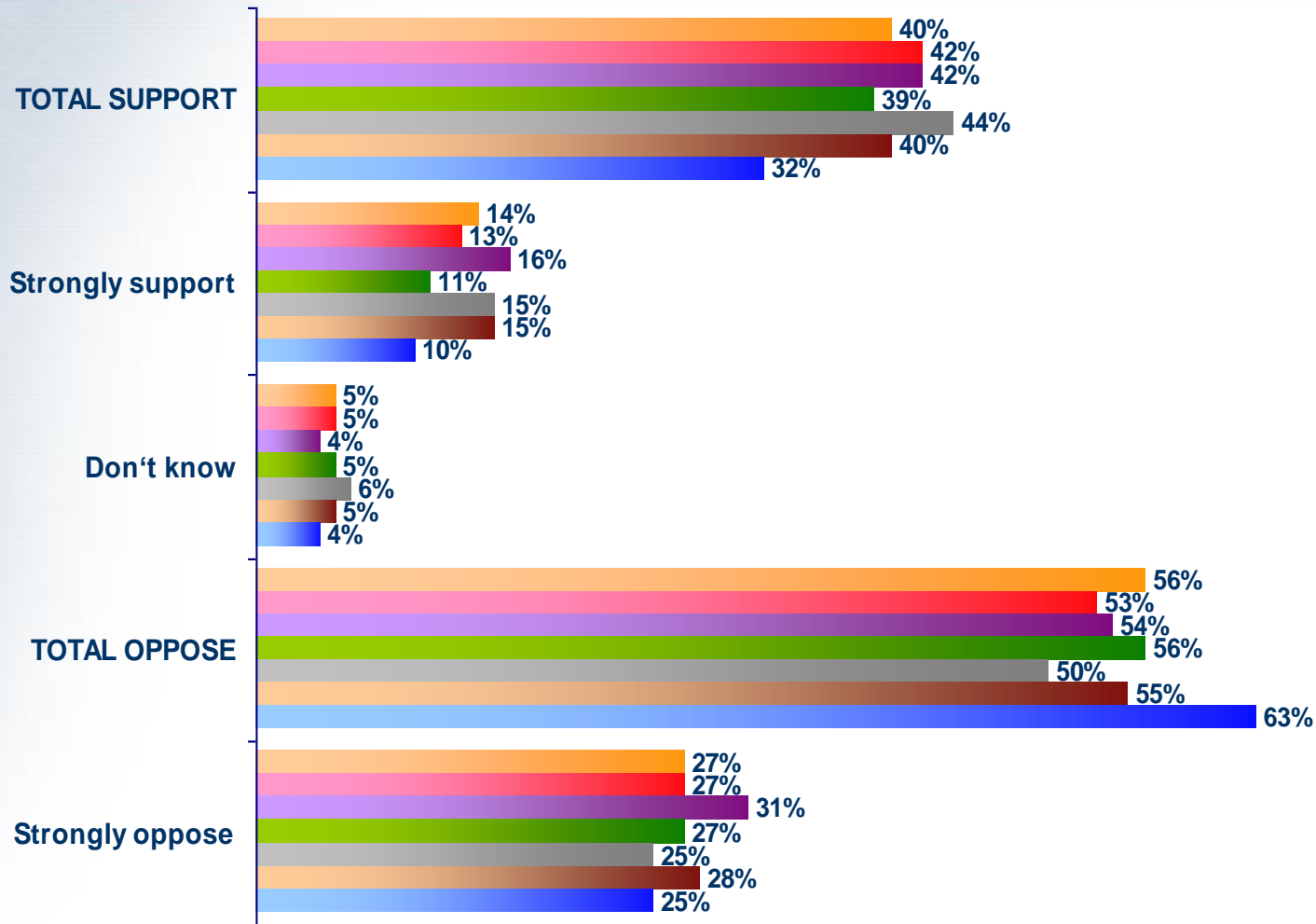
# Considered support for full range markets: Vote



Q9) Sometimes people change their minds on a subject after they have heard some arguments for or against a proposal, so would you say that you support or oppose the provision of more full-range supermarkets in your local area?



# Considered support for full range markets: Area

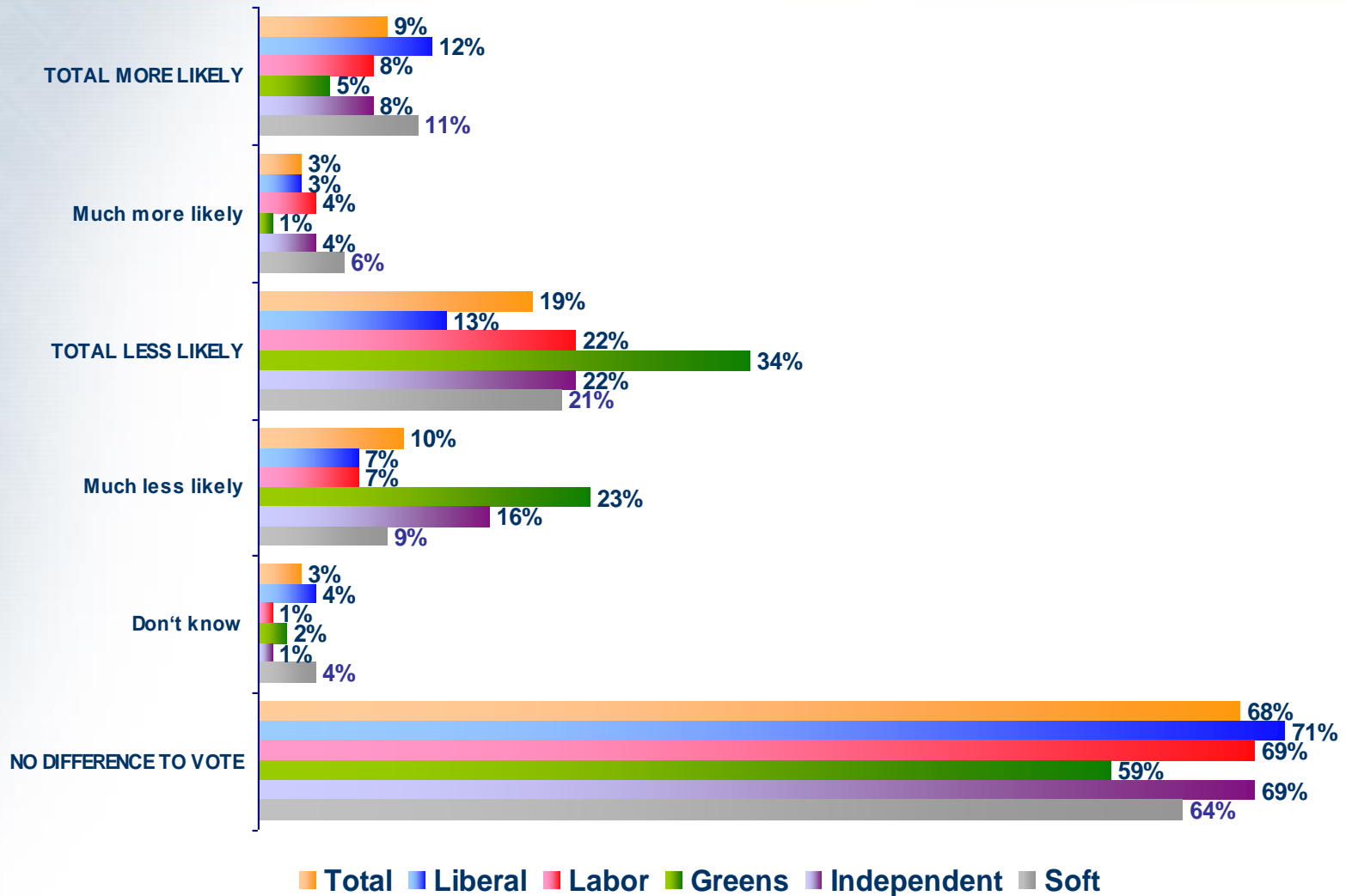


■ Total ■ Neighbouring Suburbs ■ Ward A ■ Ward B ■ Ward C ■ Ward D ■ Ward E

Q9) Sometimes people change their minds on a subject after they have heard some arguments for or against a proposal, so would you say that you support or oppose the provision of more full-range supermarkets in your local area?

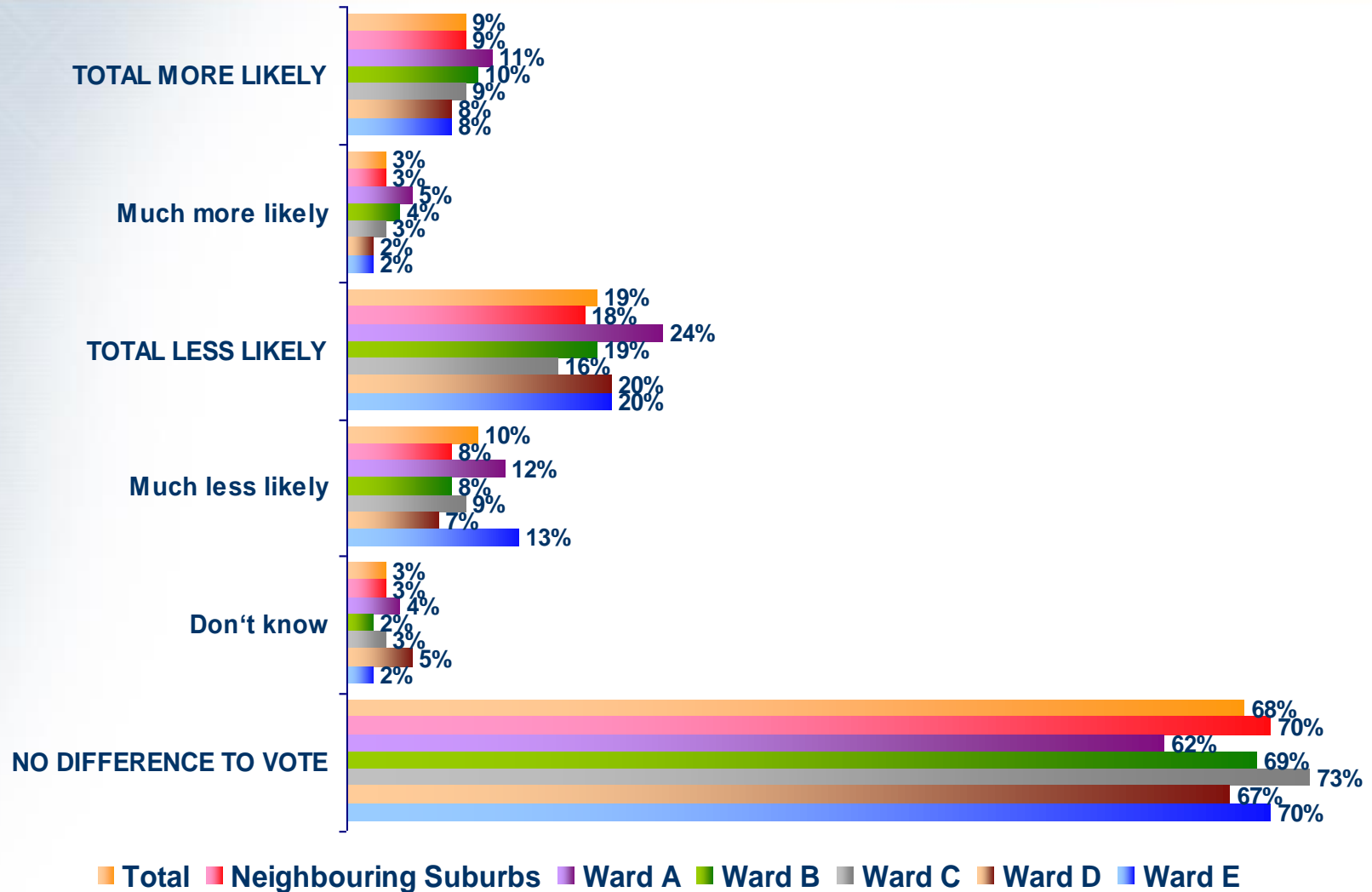


# Effect of proposal on Vote: Vote





# Effect of proposal on Vote: Area





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