

#### CROSBY | TEXTOR RESEARCH STRATEGIES RESULTS

#### Taren Point Development Research

**INTERIM REPORT** 

March 2016

### Aim & Summary Methodology



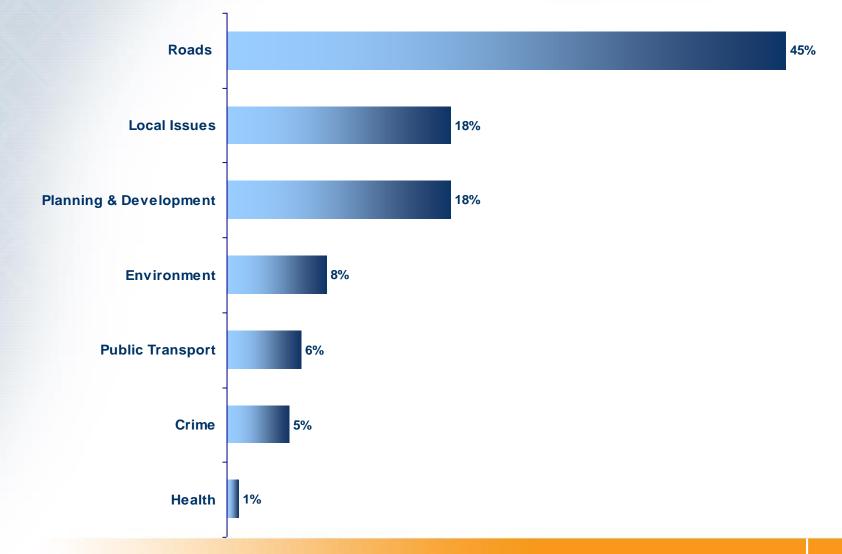
- To provide strategic, public opinion-based insights to the Woolworths team and other key decision-makers on the proposed development
- CATI survey conducted 23<sup>rd</sup> 29<sup>th</sup> March of n=750:
  - Sutherland Shire residents (data broken down by the five wards)
- Sample accurate to +/-3.58% 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.



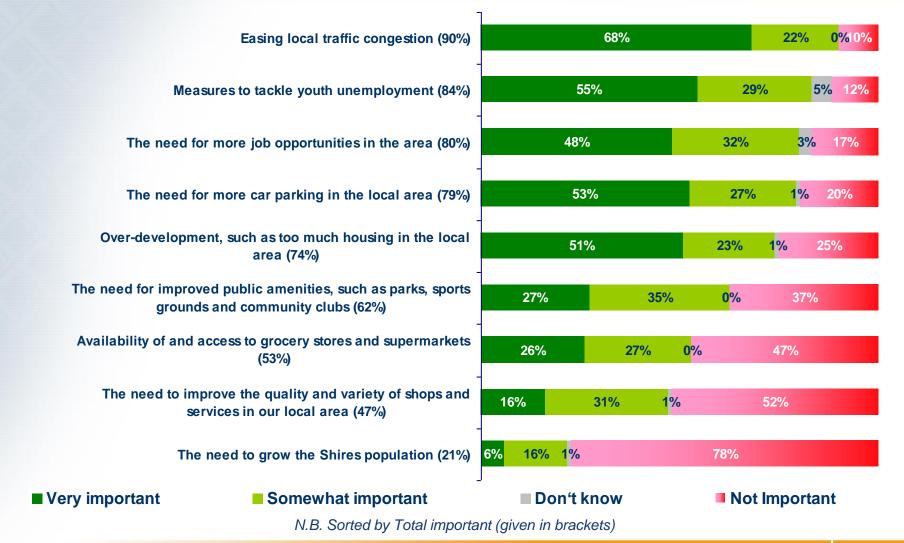
## The Context: Issue Agenda

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

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



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.

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## Perceptions of Players: Figures & Organisations

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

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Aldi supermarkets (+54)	62%			9% 8%	
IGA supermarkets (+53)	61%		29	% 9%	
Woolworths supermarkets (+43)		56%	31%	13%	
Coles supermarkets (+43)	5	4%	35%	11%	
The Premier, Mike Baird (+30)	48%	6	30%	18%	
The Sutherland Shire Council (+27)	43%		37%	17%	
The NSW Liberal Government (+16)	41%		31%	24%	
State MP Mark Speakman [Cronulla] (+15)	20%		30%	5%	
State MP Lee Evans [Heathcoate] (+10)	14%		31%	4%	
Shire Watch Independents (+8)	16%		29%	7%	
Councillor Carmelo Pesce (Mayor) (+7)	13%	27%		6%	
State MP Melanie Gibbons [Holsworthy] (+7)	12%	29%		5%	
Costco (+7)	25%	40%		18%	
State MP Eleni Petinos [Miranda] (+5)	12%	25%		7%	
Councillor Kent Johns (-2)	10%	25%		12%	
Activist groups in general (-4)	20%	41%		25%	
The Planning Minister, Rob Stokes (-4)	7%	35%		11%	
Developers in general (-23)	17%	40%		40%	

#### Favourable

#### Neutral

#### Unfavourable

*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.

Miranda

Caringbah

Engadine

Menai

**Sylvania** 

Kareela

Sutherland

Cronulla

Illawong

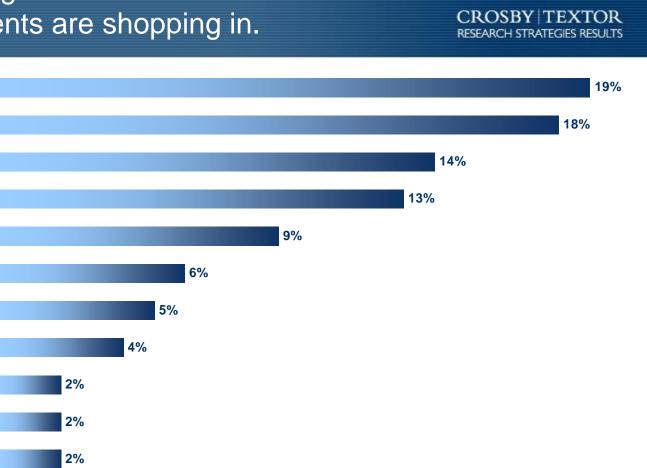
Jannali

Gymea

Online

**Taren Point** 

Other suburb outside area



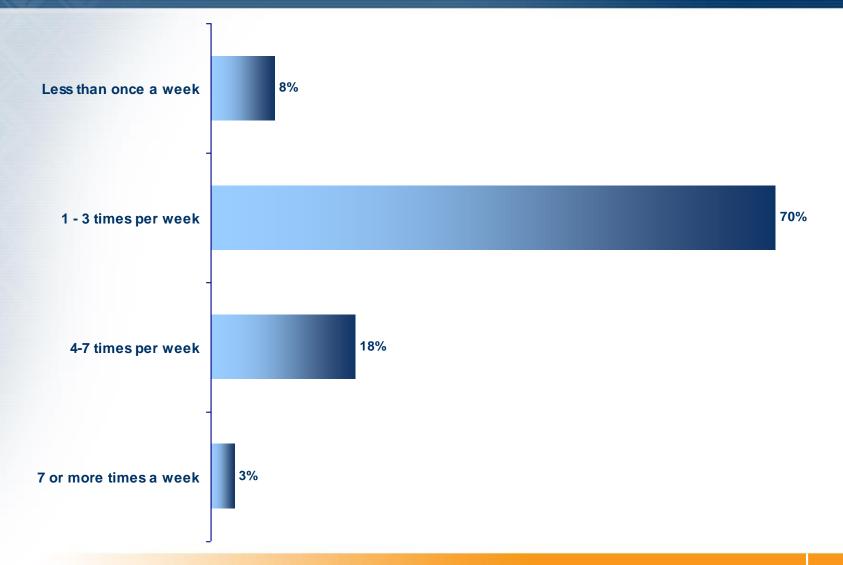
Q7b) And in what suburb are you doing the majority of your grocery shopping?

2%

1%

1%

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

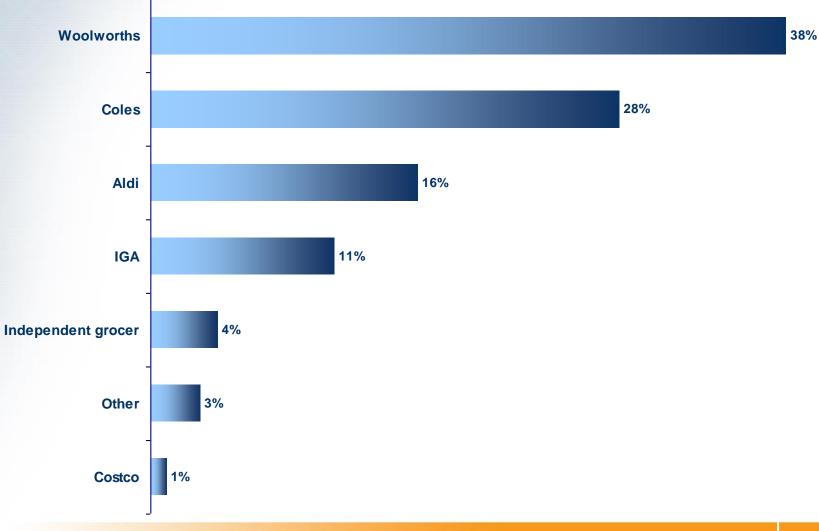


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RESEARCH STRATEGIES RESULTS

# Voters are reportedly preferring Woolworths as their preferred supermarket.

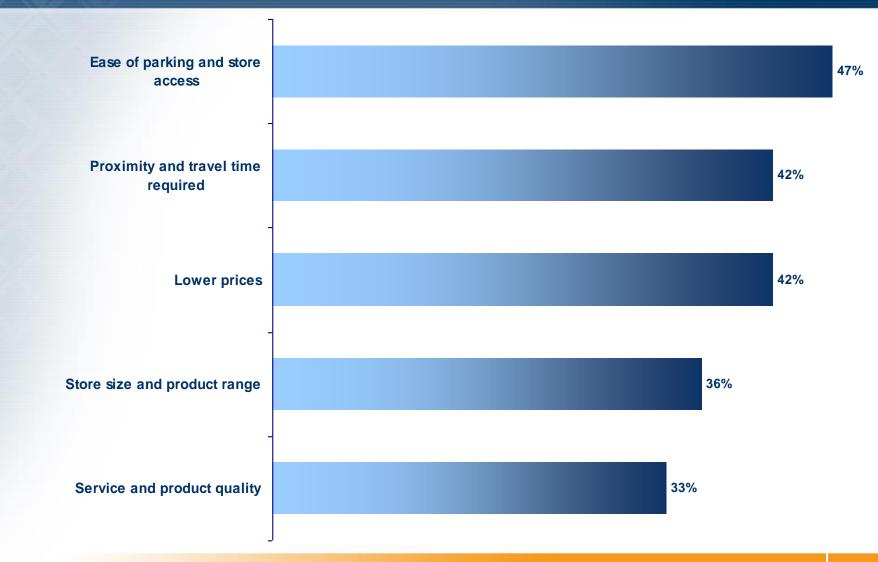
CROSBY | TEXTOR RESEARCH STRATEGIES RESULTS



Q7d) Which of the below is your preferred supermarket or grocery store?

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





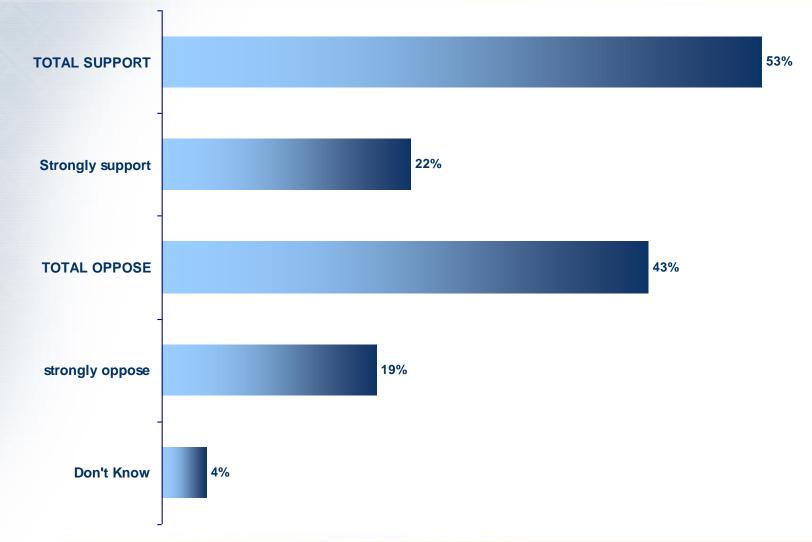
Q7e) Please rank the following as to which are the most important to you in deciding which local grocery store or supermarket you shop at.



# The Current Position: Opinion & Messaging

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

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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?

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



		and travel time, I prefe nient location availab	-	56%		31% 1		<mark>% 12%</mark>	
	I prefer shopping	at larger supermarke products (77%)	ts with a full range of	46%		32%	<mark>2%</mark> 21%	6	
20	-	pport other nearby bu shoppers to the area (		32%	43%	,	4% 22%	, D	
	There should be r	nore retail jobs availa	ble in the Shire (70%)	31%	39%	8	% 22%	, D	
	The Shire does not need more full-r Coles or Woolwor			40%	26%	<mark>6 2</mark> %	31%		
т	here is too much resid	dential development i	n the local area (62%)	38%	25%	<mark>2</mark> %	35%		
Le	ocal residents would I	benefit from a more co sector (62%)	- mpetitive local retail	29%	32%	4%	35%		
Strongly agree       Somewhat agree       Don't know       Disagree         N.B. Sorted by Total important (given in brackets)       Disagree									

Q8) I'm now going to read out a list of statements that other people have said about supermarket and retail shopping in the Sutherland Shire. Regarded 15 of your overall view, I want you to tell me whether you agree or disagree with each statement. 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



		ents would benefit from more convenier ket and shopping options (61%)	<sup>t</sup> 23%	39%	<mark>2% 3</mark> 7%	6
		ermarkets and small shopping centres t				
be built in any busines		s precinct, not just in existing centres or villages (46%)	17%	<b>29%</b> 3	<mark>% 50%</mark>	
		t would improve my local community, b ople to shop close to home (45%)	y 21%	24% 2%	<b>6</b> 53%	
		ood and grocery shopping choices in the e, closer to me (38%)	- - 18%	20% 2%	60%	
		es and number of shopping centres in the ng pace with population growth (33%)	- 9 12%	<mark>20%</mark> 5%	62%	
	It takes too long to travel to my preferred supermarket or grocery		y 7% 10% 2	%	81%	
	store so I need something closer to me (17%) Strongly agree Somewhat agree		Don't	know	Disagree	
Q8)	I'm now going to read out a list o	N.B. Sorted by Total i of statements that other people have said abo			the Sutherland Shire. Rec	ardless
/	0 0					

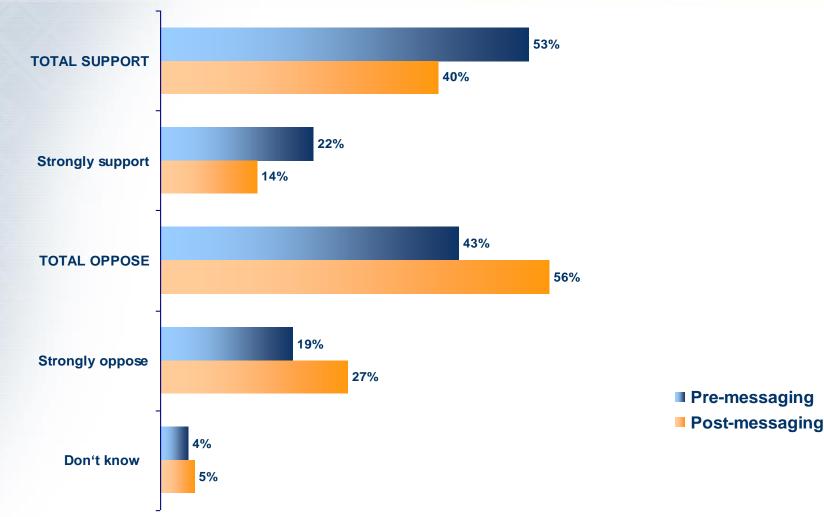
of your overall view, I want you to tell me whether you agree or disagree with each statement.



### **Considered Opinion**

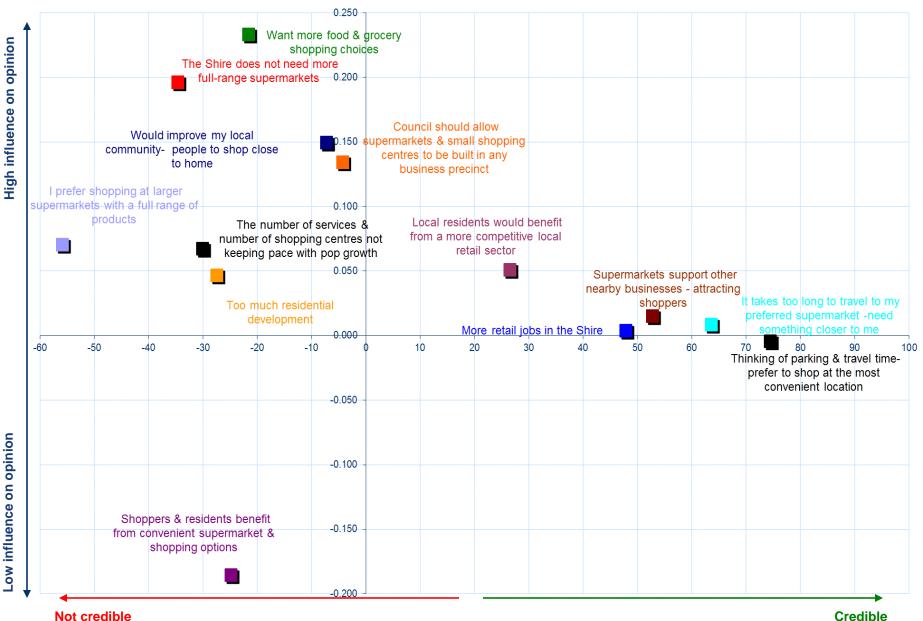
After prompted messaging of arguments both for and against the development of full-range supermarket options, overall support decreases.





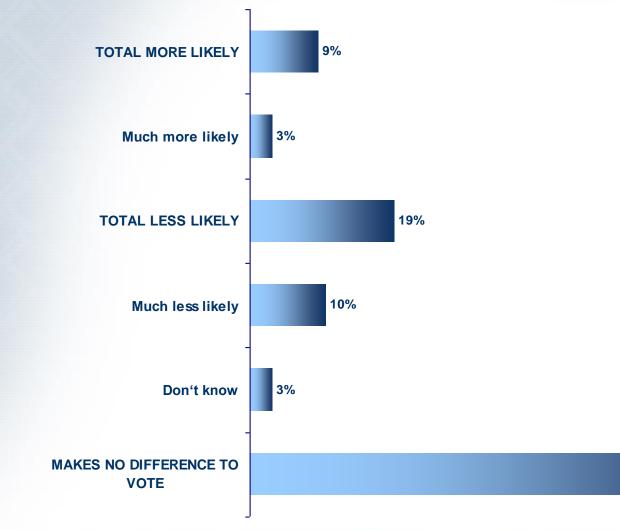
Q7f) Based on your experiences of shopping in the Shire, would you support or oppose the provision of more full range supermarkets in your local area? Q9) Sometimes people change their minds on a subject after they have heard some arguments for or against a proposal, so would you say that you support 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





68%

Q10) If your local council representatives agreed to these proposed developments, would you be more or less likely to Vote for them, or would it make no difference to your Vote?

### 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.



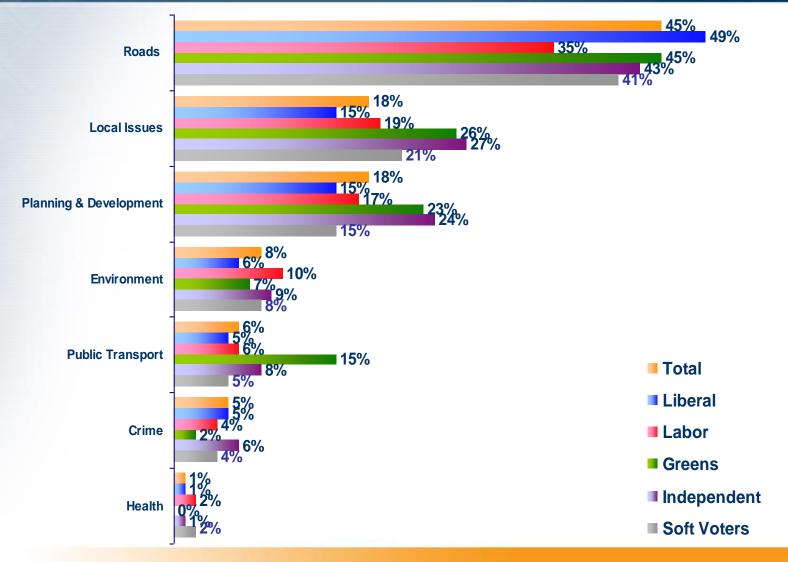
## Appendix



## The Context: Issue Agenda

### Unprompted issues of concern: Vote

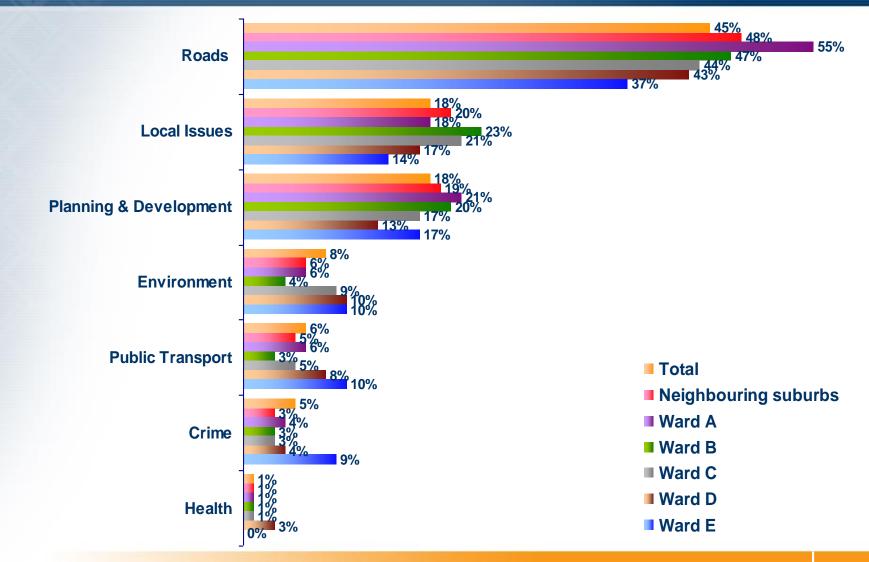




Q1) What are the most important issues of concern to you in your local area that you would like your local council to do something about? What else?

### Unprompted issues of concern: Area





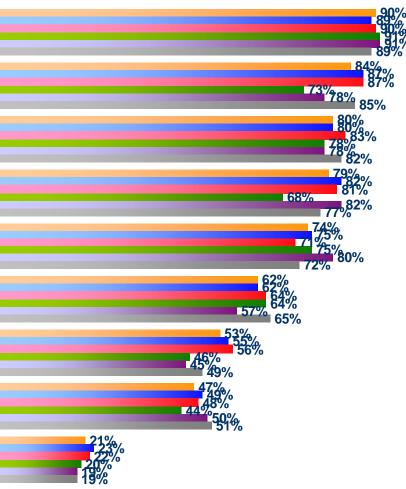
Q1) What are the most important issues of concern to you in your local area that you would like your local council to do something about? What else?



### Prompted issues of concern: Vote

-

Easing local traffic congestion	
Measures to tackle youth unemployment	
The need for more job opportunities in the area	
The need for more car parking in the local area	
Over-development, such as too much housing in the local area	
The need for improved public amenities, such as parks, sports grounds and community clubs	
Availability of and access to grocery stores and supermarkets	
The need to improve the quality and variety of shops and services in our local area	
The need to grow the Shires population	



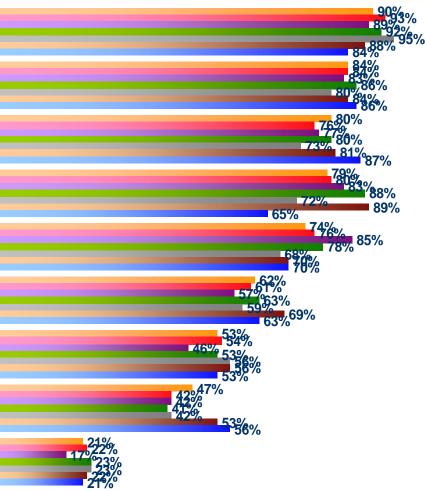
#### ■ TOTAL IMPORTANT ■ Liberal ■ Labor ■ Greens ■ Independents ■ Soft Voters

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

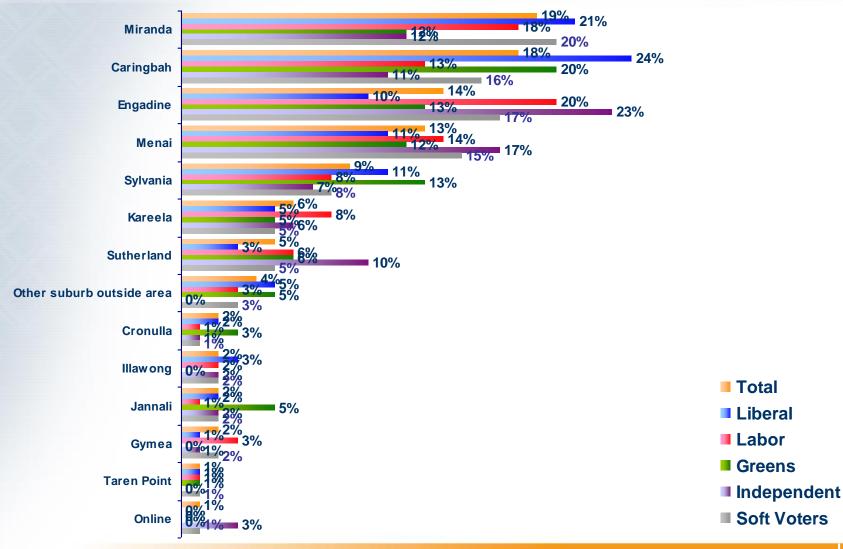
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# **Shopping Habits**

### Grocery shopping Suburb: Vote

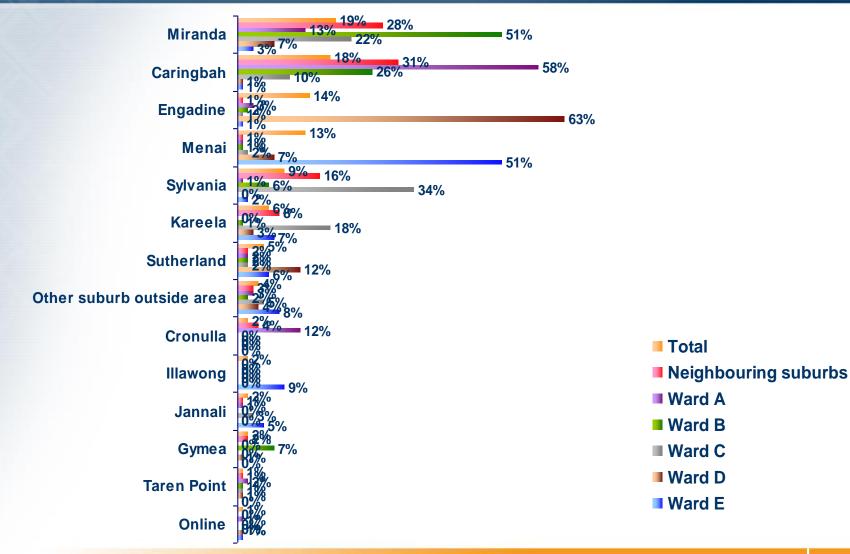




Q7b) And in what suburb are you doing the majority of your grocery shopping?

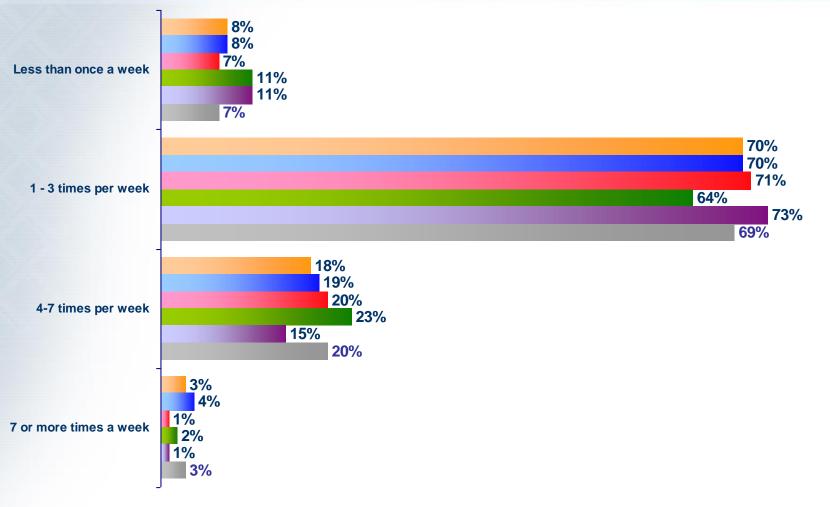
### Grocery shopping Suburb: Area





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

### Grocery shopping Frequency: Vote

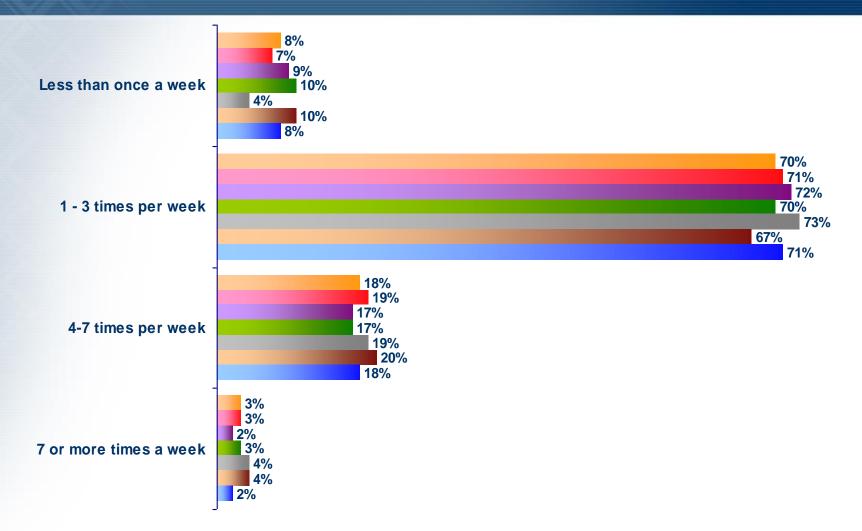


Total Liberal Labor Greens Independent Soft

7c) How often do you visit a grocery store or supermarket per week?

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### Grocery shopping Frequency: Area



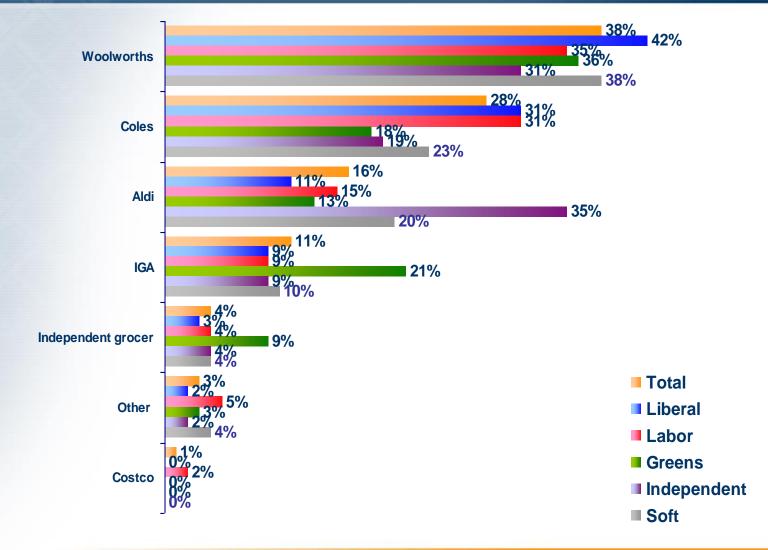
Total Neighbouring suburbs Ward A Ward B Ward C Ward D Ward E

7c) How often do you visit a grocery store or supermarket per week?

CROSBY TEXTOR RESEARCH STRATEGIES RESULTS

#### Grocery shopping store: Vote

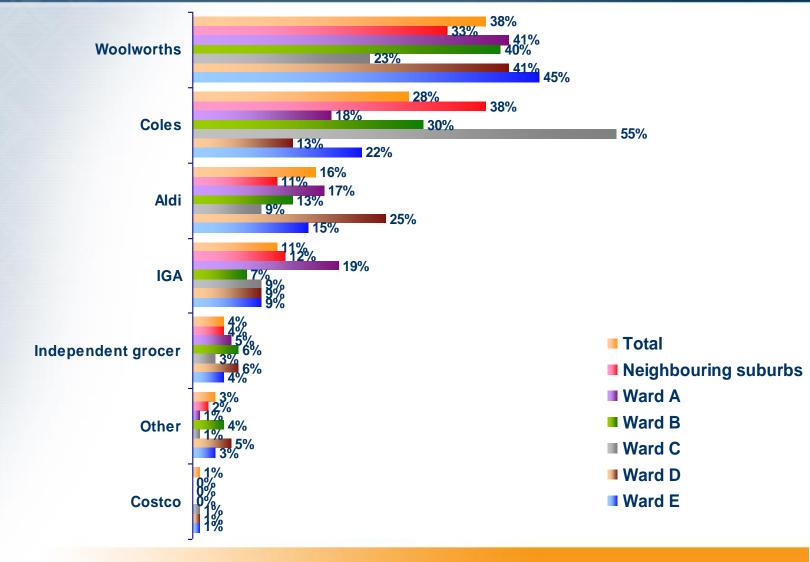




Q7d) Which of the below is your preferred supermarket or grocery store?

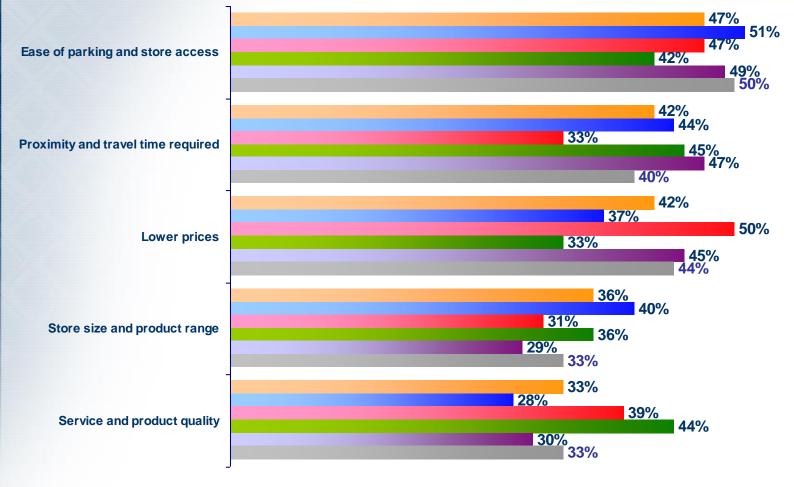
### Grocery shopping store: Area





### Grocery shopping features: Vote



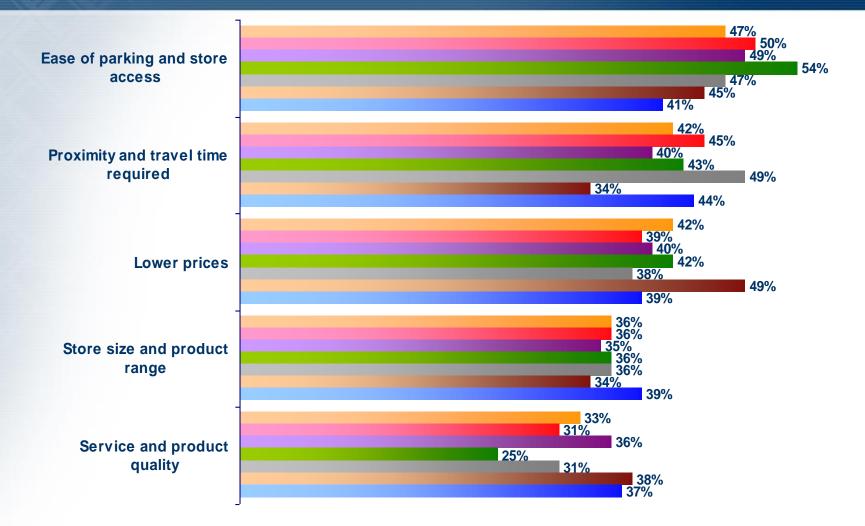


#### ■ Total ■ Liberal ■ Labor ■ Greens ■ Independents ■ Soft Voters

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





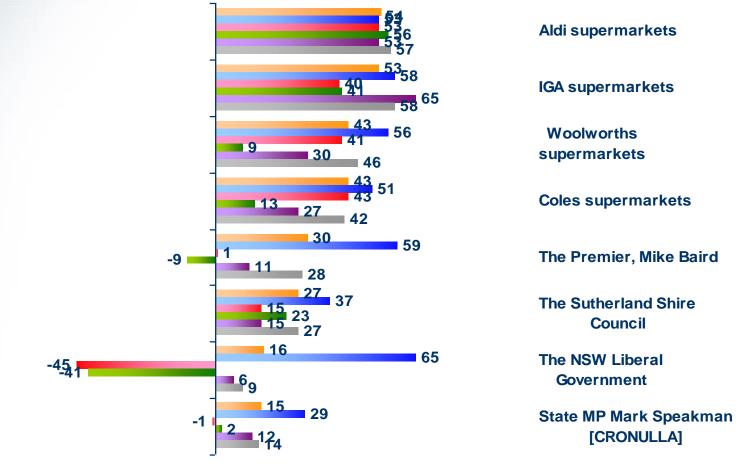
Total Neighbouring Suburbs Ward A Ward B Ward C Ward D Ward E



## Perceptions of Players: Figures & Organisations

### Net Favourability: Vote, 1/2



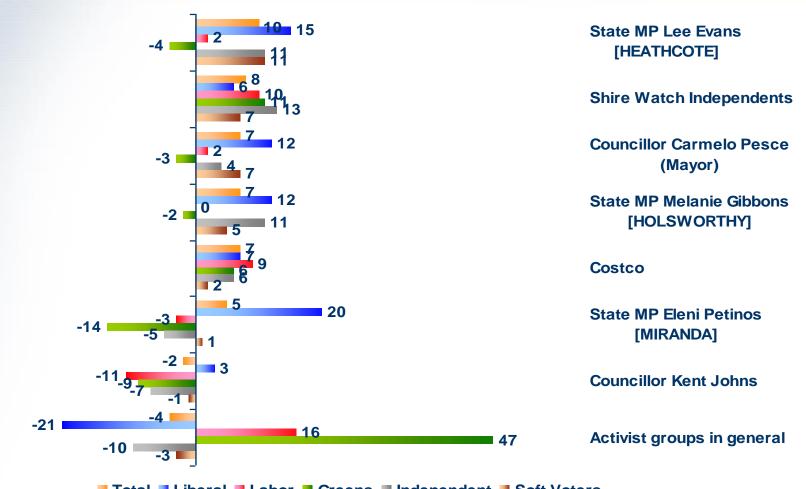


#### ■ Total ■ Liberal ■ Labor ■ Greens ■ Independent ■ Soft Voters

Net favourability = % Favourable - % Unfavourable

### Net Favourability: Vote, 2/2



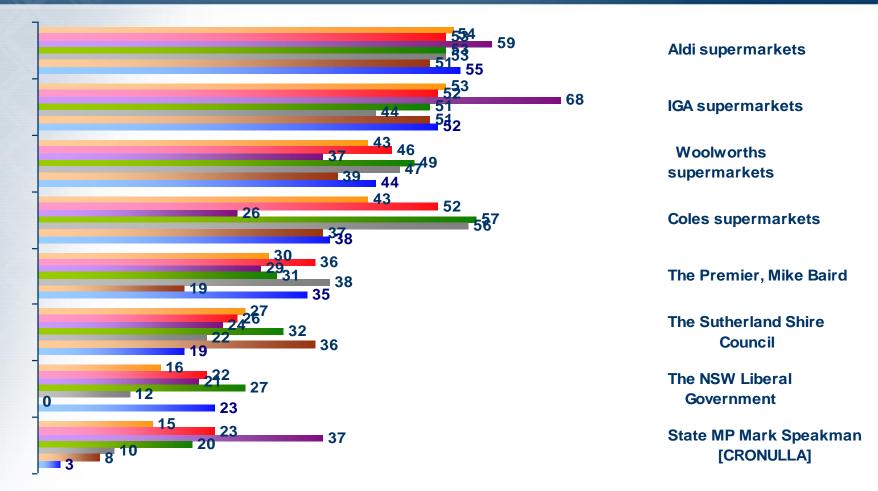


Total Liberal Labor Greens Independent Soft Voters

Net favourability = % Favourable - % Unfavourable

### Net favourability: Area, 1/2



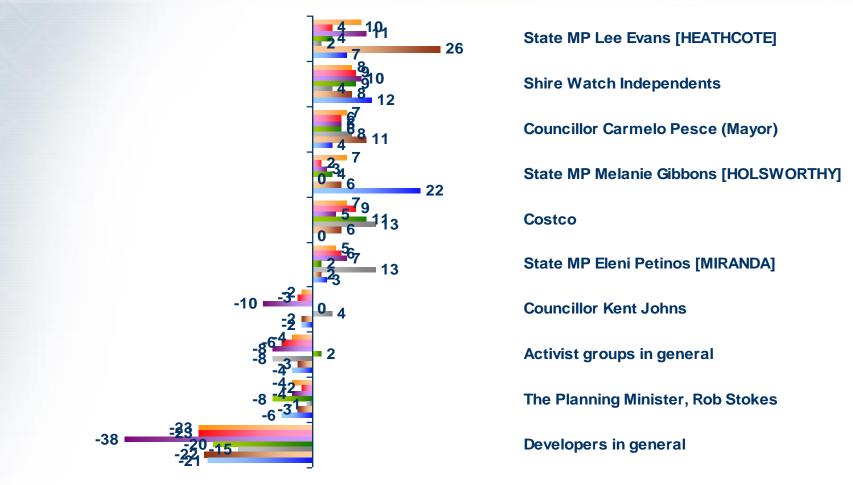


#### Total Neighbouring suburbs WARD A WARD B WARD C WARD D WARD E

Net favourability = % Favourable - % Unfavourable

### Net favourability: Area 2/2





#### Total Neighbouring suburbs WARD A WARD B WARD C WARD D WARD E

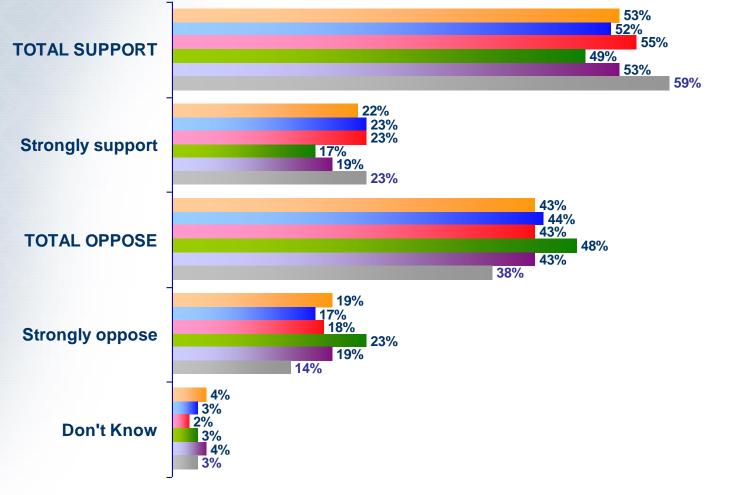
Net favourability = % Favourable - % Unfavourable



## The Current Position: Opinion & Messaging

## Initial support full range markets: Vote



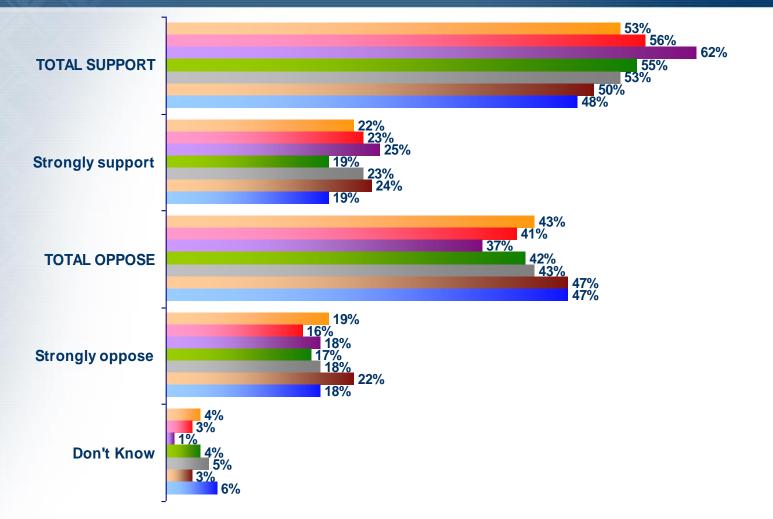


Total Liberal Labor Greens Independents Soft Voters

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

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?



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



#### Total Liberal Labor Greens Independents Soft Voters

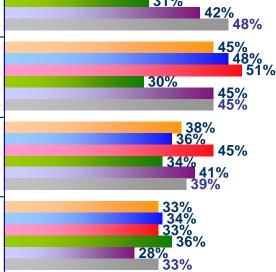
Q8)I'm now going to read out a list of statements that other people have said about supermarket and retail shopping in the Sutherland Shire. Regardless of your overall view, I want you to tell me whether you agree or disagree with each statement.

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

Local residents would benefit from a more

competitive local retail sector

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Shoppers and residents would benefit from more convenient supermarket and shopping options

Council should allow supermarkets and small shopping centres to be built in any business precinct, not just in existing centres or villages

A new, local supermarket would improve my local community, by encouraging people to shop close to home

I would like to see more food and grocery shopping choices in the Shire, closer to me

The number of services and number of shopping centres in the Shire is not keeping pace with population growth

#### Total Liberal Labor Greens Independents Soft Voters

Q8)I'm now going to read out a list of statements that other people have said about supermarket and retail shopping in the Sutherland Shire. Regardless of your overall view, I want you to tell me whether you agree or disagree with each statement.

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



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

Q8) I'm now going to read out a list of statements that other people have said about supermarket and retail shopping in the Sutherland Shire. Regardless of your overall view, I want you to tell me whether you agree or disagree with each statement.

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RESEARCH STRATEGIES RESULTS



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

Local residents would benefit from a more competitive local retail sector

Shoppers and residents would benefit from more convenient supermarket and shopping options

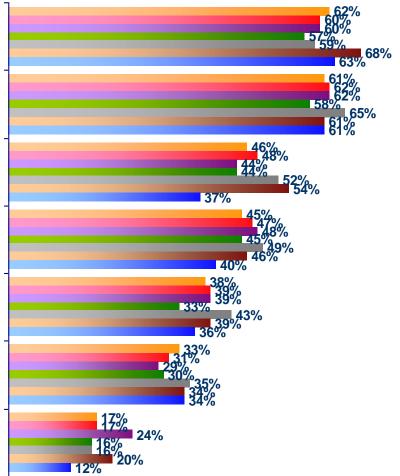
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A new, local supermarket would improve my local community, by encouraging people to shop close to home

I would like to see more food and grocery shopping choices in the Shire, closer to me

The number of services and number of shopping centres in the Shire is not keeping pace with population growth

It takes too long to travel to my preferred supermarket or grocery store so I need something closer to me



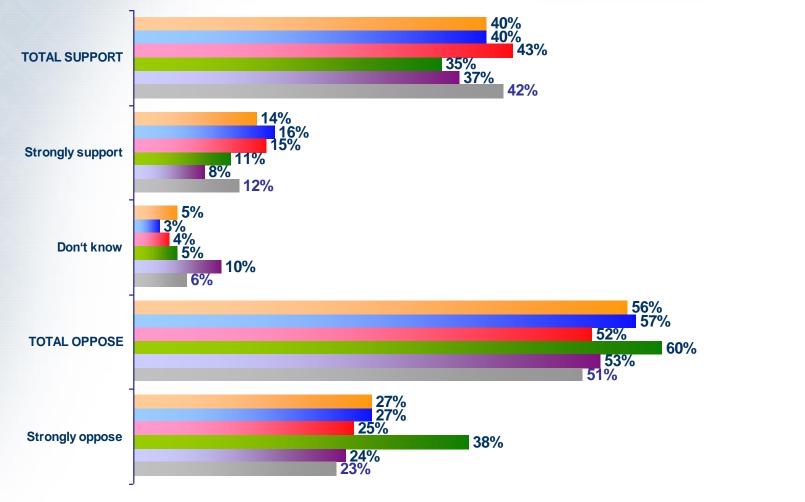
#### Total Neighbouring Suburbs Ward A Ward B Ward C Ward D Ward E

Q8) I'm now going to read out a list of statements that other people have said about supermarket and retail shopping in the Sutherland Shire. Regardless of your overall view, I want you to tell me whether you agree or disagree with each statement.



## **Considered Opinion**

## Considered support for full range markets: Vote



■ Total ■ Liberal ■ Labor ■ Greens ■ Independent ■ Soft

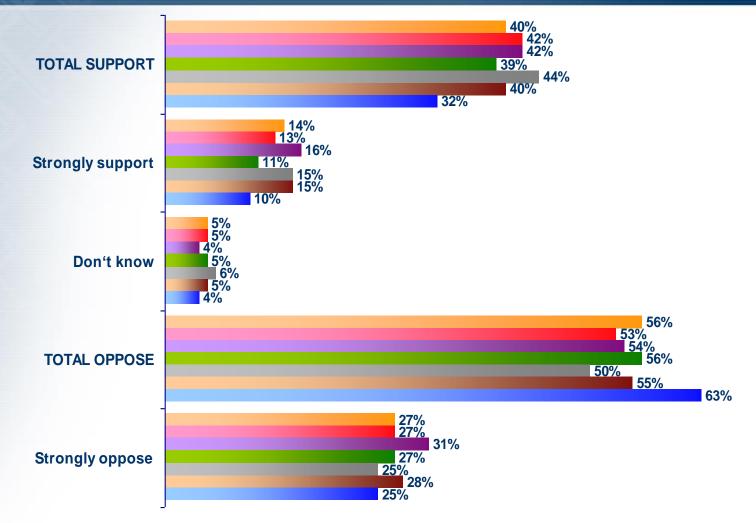
Q9) Sometimes people change their minds on a subject after they have heard some arguments for or against a proposal, so would you say that you support or oppose the provision of more full-range supermarkets in your local area?

CROSBY | TEXTOR

RESEARCH STRATEGIES RESULTS

## Considered support for full range markets: Area



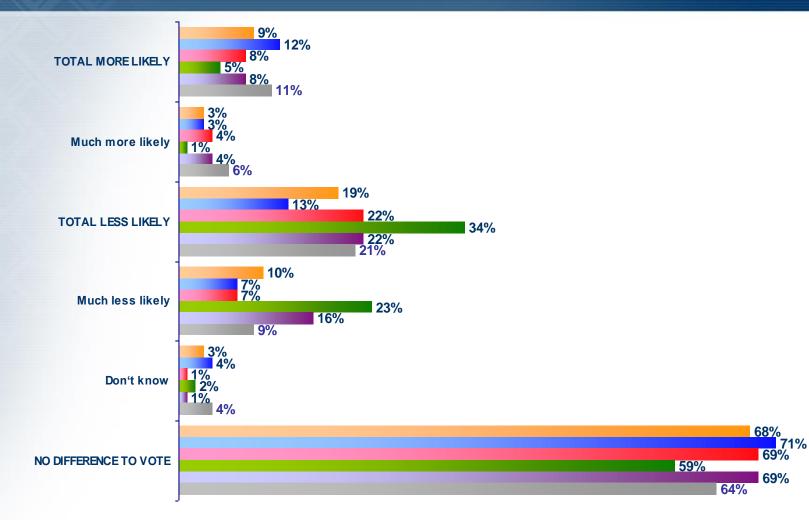


Total Neighbouring Suburbs Ward A Ward B Ward C Ward D Ward E

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

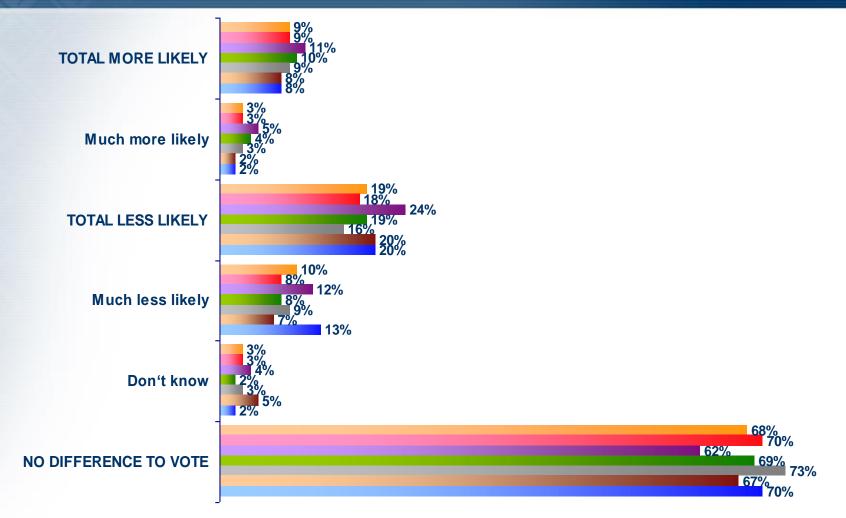


#### ■ Total ■ Liberal ■ Labor ■ Greens ■ Independent ■ Soft

Q10) If your local council representatives agreed to these proposed developments, would you be more or less likely to Vote for them, or would it make no difference to your Vote?

### Effect of proposal on Vote: Area





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

Q10) If your local council representatives agreed to these proposed developments, would you be more or less likely to Vote for them, or would it make no difference to your Vote?



### CROSBY | TEXTOR RESEARCH STRATEGIES RESULTS

### **Taren Point Development Research**

**INTERIM REPORT** 

March 2016