



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS

Eastlakes Town Centre Research – Community Opinions

March 2012

Summary



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS

Methodology and Objectives

- **This research study will help to better understand the perception and views of local residents on the proposed redevelopment of the Eastlakes Shopping Centre.**
 - Identify awareness on the proposed redevelopment.
 - Determine the level of support.
 - Test the credibility and effectiveness of positive messages regarding the proposed redevelopment.
 - Compare significant differences by postcode groupings.
 - Regression analyses used to determine the influence of positive and negative messaging on considered support.
- **Telephone (CATI) survey.**
 - Conducted between 23rd – 26th February 2012.
 - Random sample of n=300 within the Federal Electorate of Kingsford Smith (Botany, Daceyville, Eastgardens, Eastlakes, Hillsdale, Kensington, Kingsford, Mascot and Pagewood)
 - +/-5.6% maximum margin of error (at the 95% confidence level)
 - Otherwise representative of age, sex and (suburb) area.
- **Results analysed and reported by independent, qualified researchers, members of the Australian Market and Social Research Society (AMSRS).**

Summary



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS

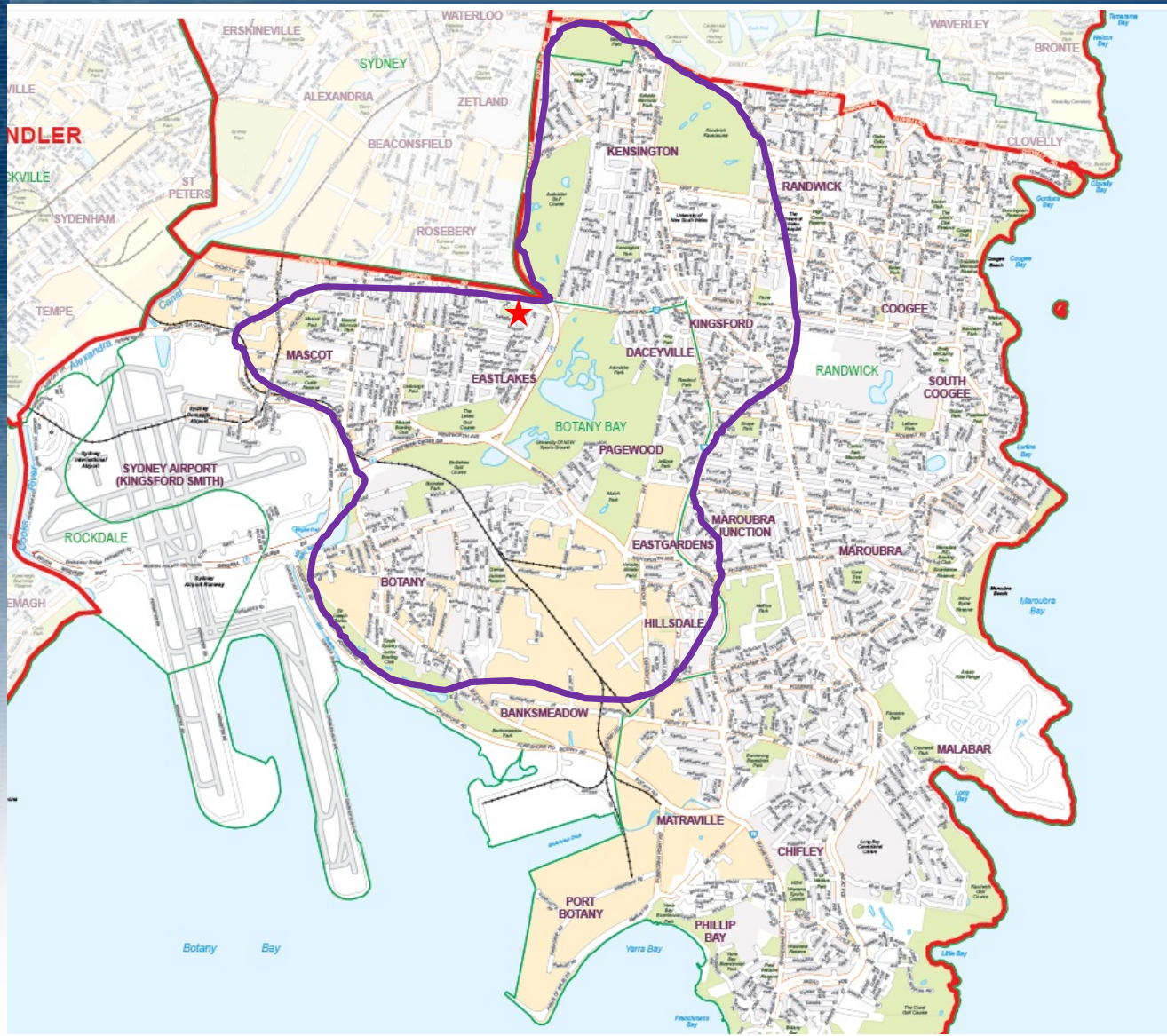
Results and Findings

- **The main issue of concern in the local area is traffic congestion (18%),** followed by public transport (17%) and safety (17%).
- **About a third (32%) of residents visit the Eastlakes Shopping Centre at least once a week** and 19% visit the Shopping Centre twice or more often.
- Overall awareness of the proposed redevelopment of the Eastlakes Shopping Centre is 35%, while 65% of local residents are unaware (have never heard or seen anything). However, almost half of Eastlakes residents are aware of the development.
- **Initial support (before exposure to positive and negative messaging) amongst all residents is high at 69%,** and from those, 36% affirmed they 'strongly agree' with the redevelopment. Total opposition to the redevelopment is low at 20% (around 1 in 5 residents) and 10% are undecided.
- The most credible messages are 'generate more local jobs' (85% total agree), 'better quality shops' (81%), 'Eastlakes catch up with improvements' (78%), 'improve the look and feel of the area' (78%) and 'boost property value' (75%).
- **Local parks (20%), education (18%) and roads (13%) are the main priority areas nominated by residents for additional investment in their local community.**
- Following exposures to both positive and negative messages, considered support **increased** to 75% (strongly support + somewhat support), while opposition remained stable at 20%.

Areas surveyed



CROSBY | TEXTOR
RESEARCH STRATEGIES RESULTS



Botany

Daceyville

Eastgardens

Eastlakes

Hillside

Kensington

Kingsford

Mascot

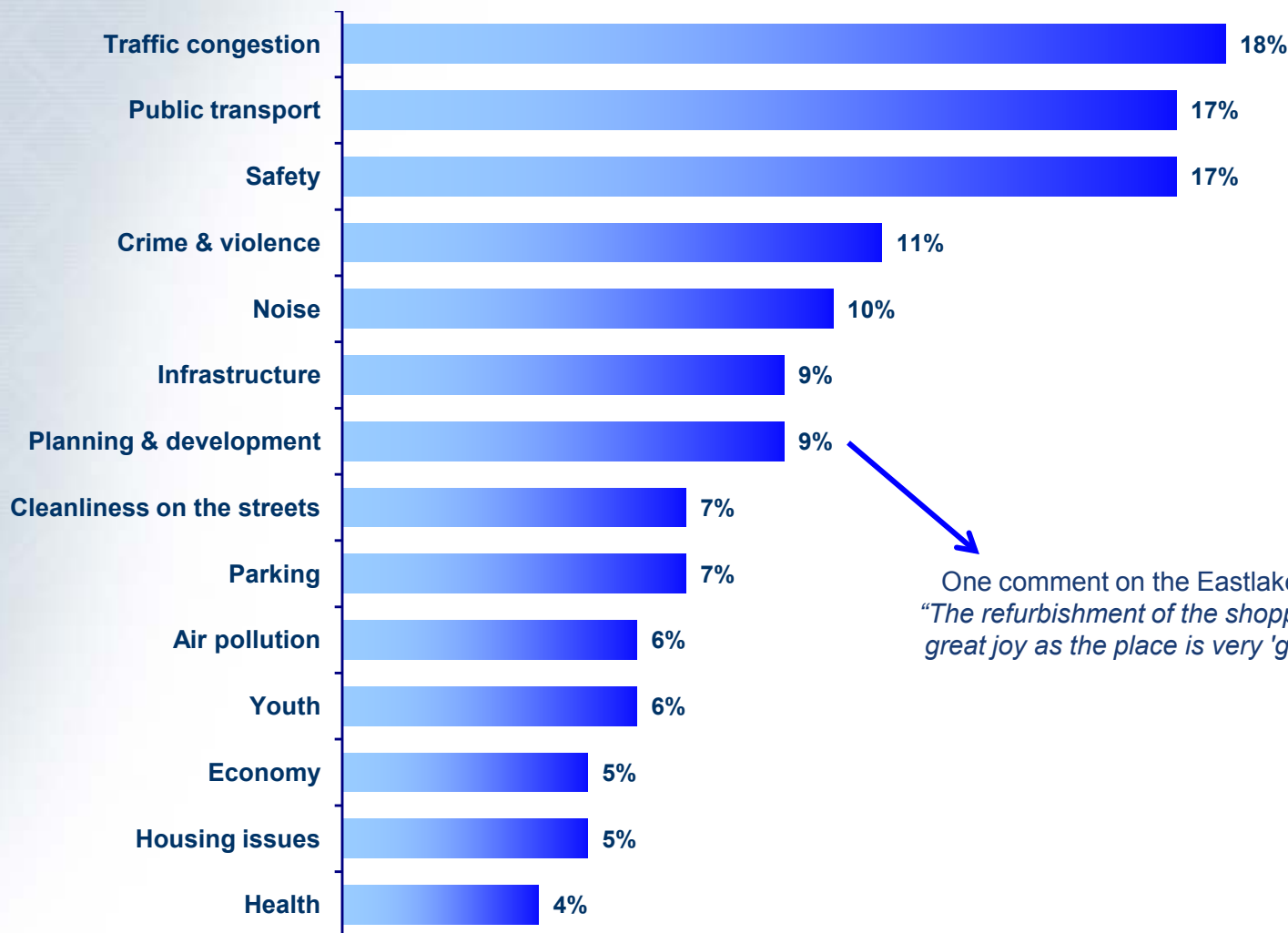
Pagewood



Local Area & Eastlakes Shopping Centre



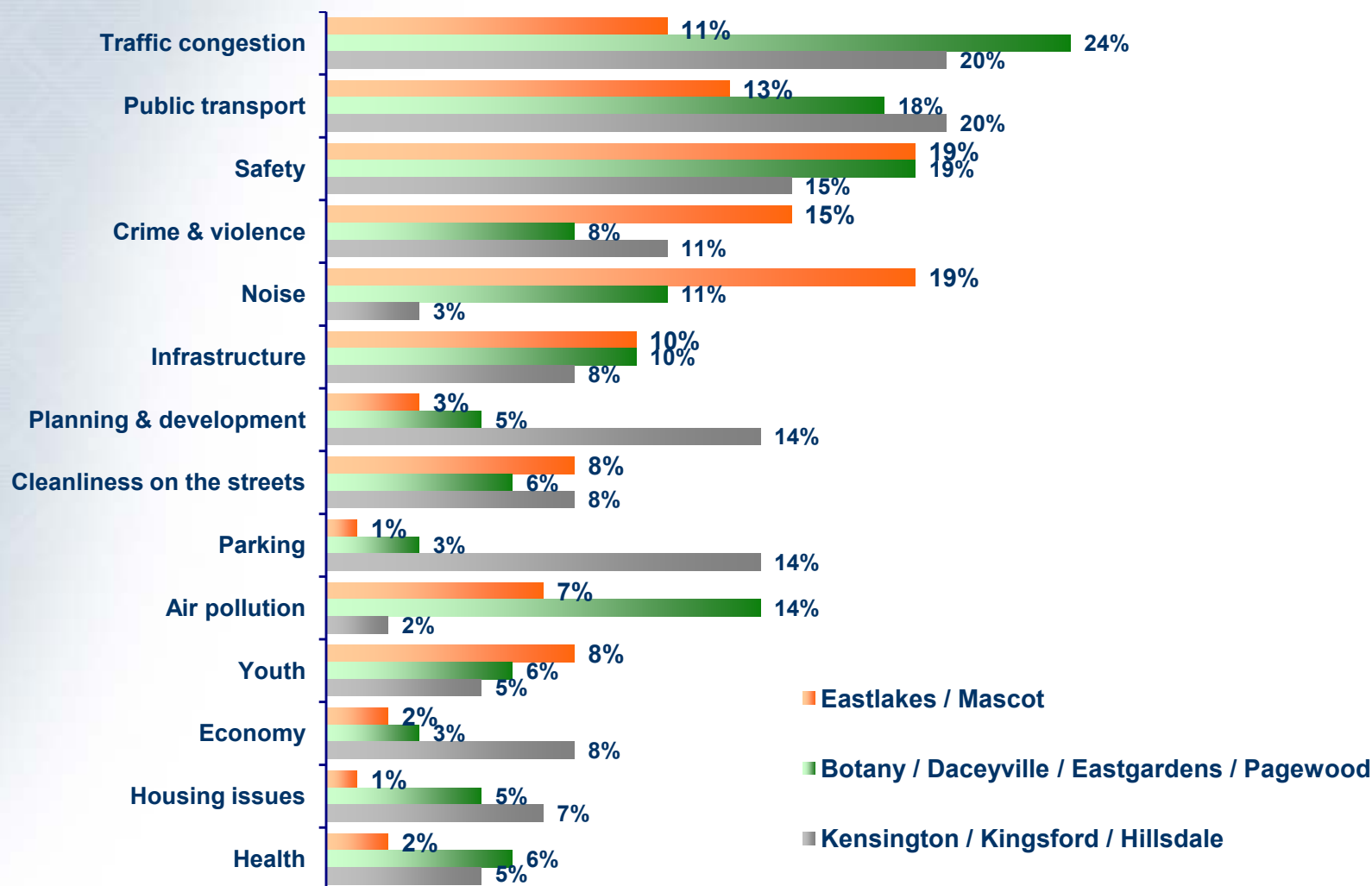
Q3) Thinking about your local area, what are the most important issues of concern to you and your family?



One comment on the Eastlakes Shopping Centre:
"The refurbishment of the shopping centre would be a great joy as the place is very 'grungy' and run down".



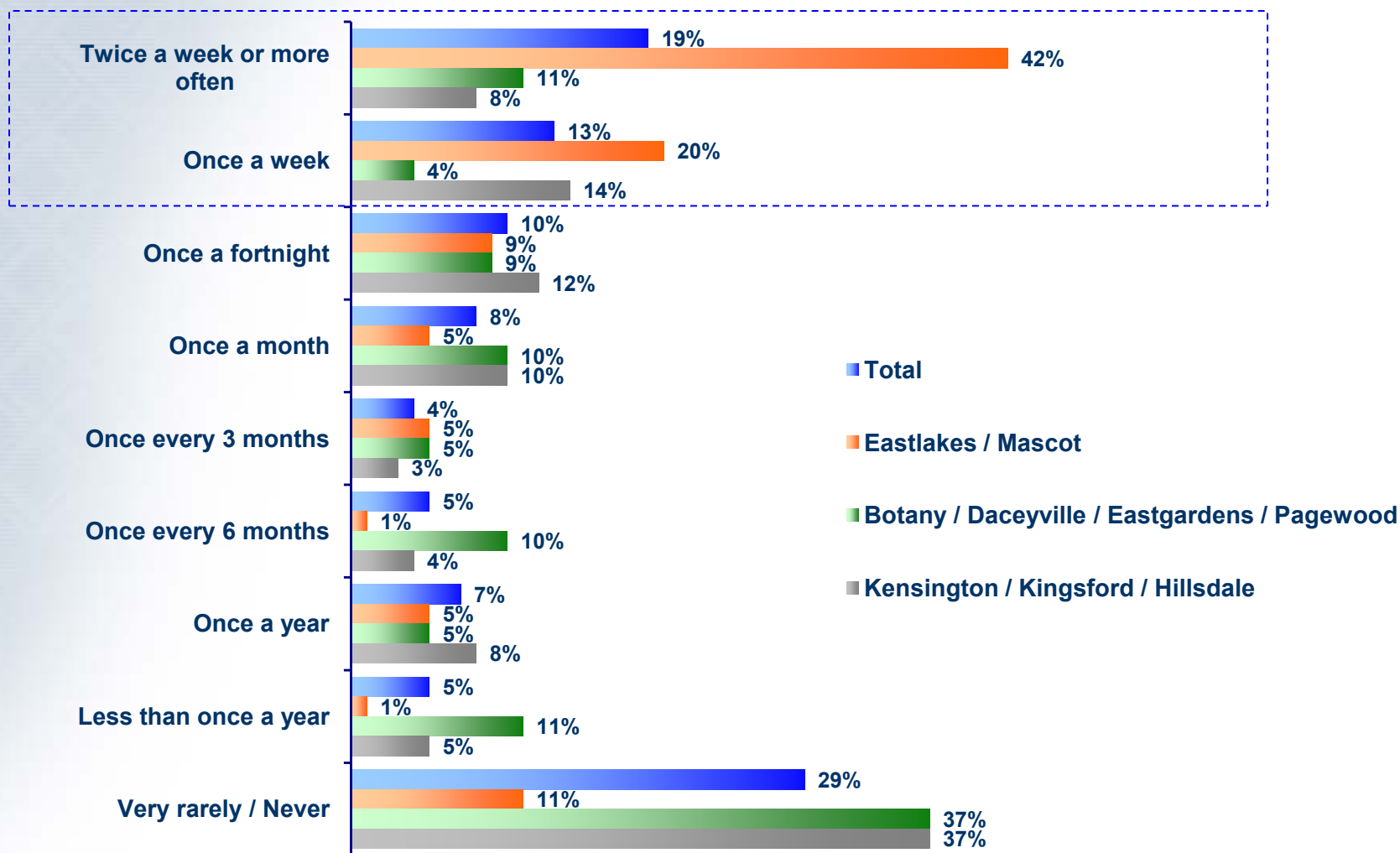
Q3) Thinking about your local area, what are the most important issues of concern to you and your family?



Traffic congestion is an issue of concern for residents in the Botany and Kensington area, while Eastlakes/Mascot residents are far more concerned with safety and noise.



Q3b) How often, on average, would you say you visit the Eastlakes Shopping Centre in your local area?



About a third (32%) of residents visit the Eastlakes Shopping Centre at least once a week, and this number increases to more than two thirds (62%) amongst those living in the Eastlakes and Mascot area.

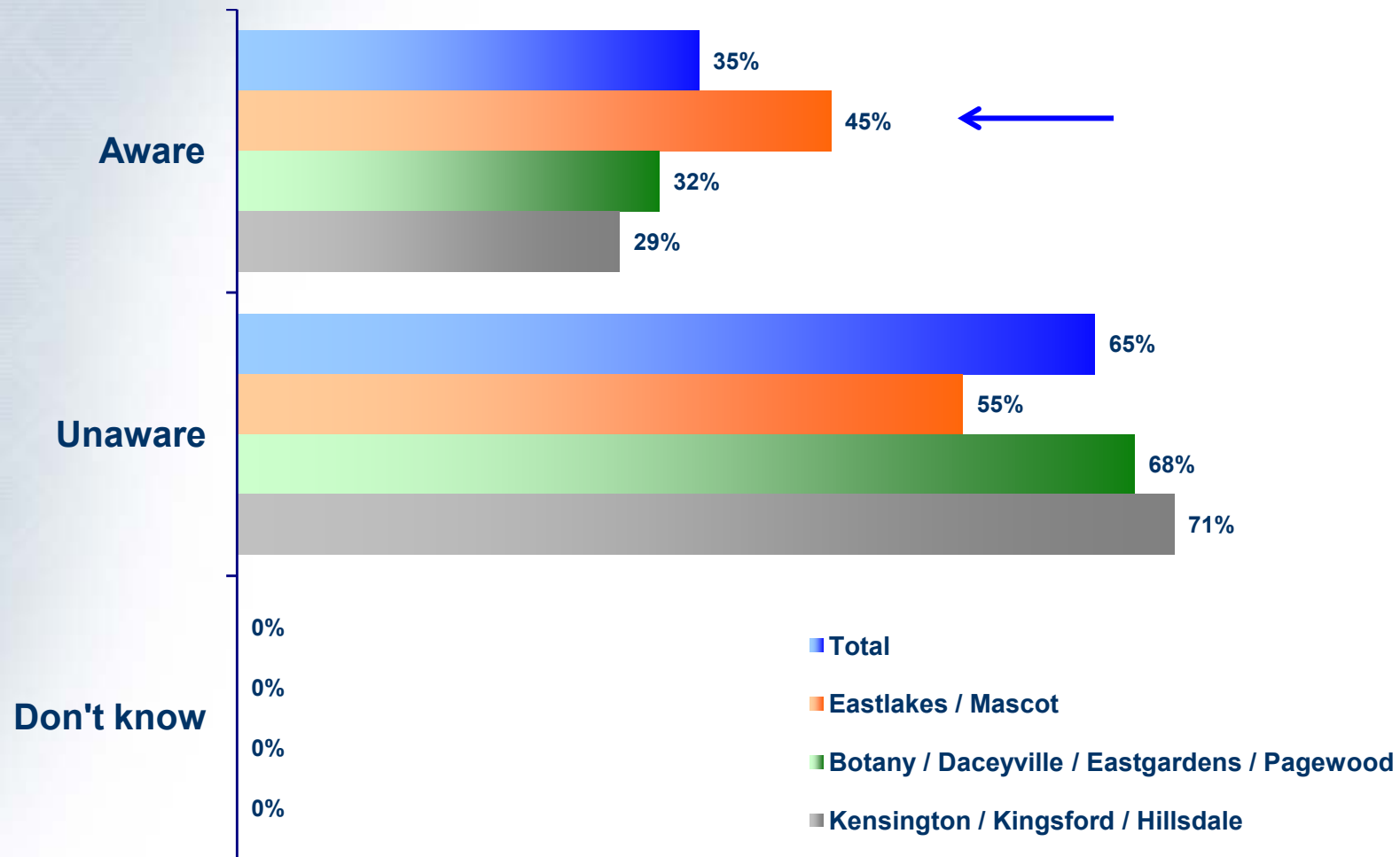


Awareness of the Proposed Redevelopment

Q4) There has been some comment in the media recently about a proposal to redevelop Before today, have you read, seen or heard anything about this proposed redevelopment of the Eastlakes Shopping Centre?



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS



*Aware = % Definitely yes + % Probably yes

Unaware = % Definitely no + % Probably no + % Undecided

Less than four in ten local residents have heard or seen anything about the proposed redevelopment. However, amongst Eastlakes and Mascot residents, awareness is almost half.



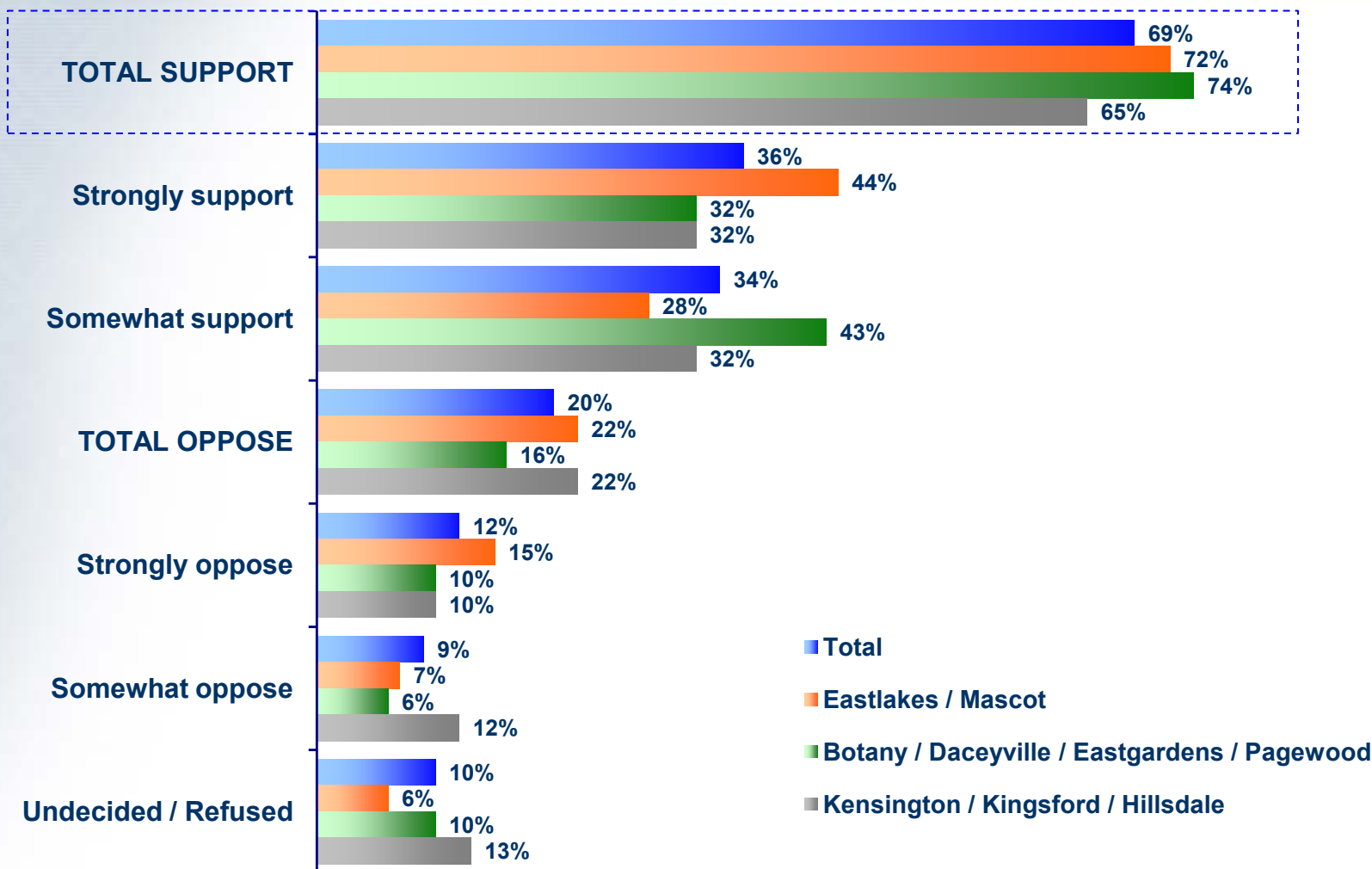
Initial opinion on the Proposed Redevelopment

The proposed redevelopment aims to transform the existing Eastlakes Shopping Centre. That will be achieved by demolishing the current Eastlakes Shopping Centre and replacing it with a new Town Centre on the same site that will include expanded retail, new community services and residential apartments above the revitalised centre.



CROSBY | TEXTOR
RESEARCH STRATEGIES RESULTS

Q5) Based on what you know at this point in time, how likely are you to support the proposed redevelopment of the Eastlakes Shopping Centre to a new Town Centre?



*Total support= % Strongly support + % Somewhat support Total oppose = % Strongly oppose + % Somewhat oppose

Almost seven in ten local residents have an existing desire to support the redevelopment, even though the vast majority have not heard or seen anything about it.

*Results rounded up or down

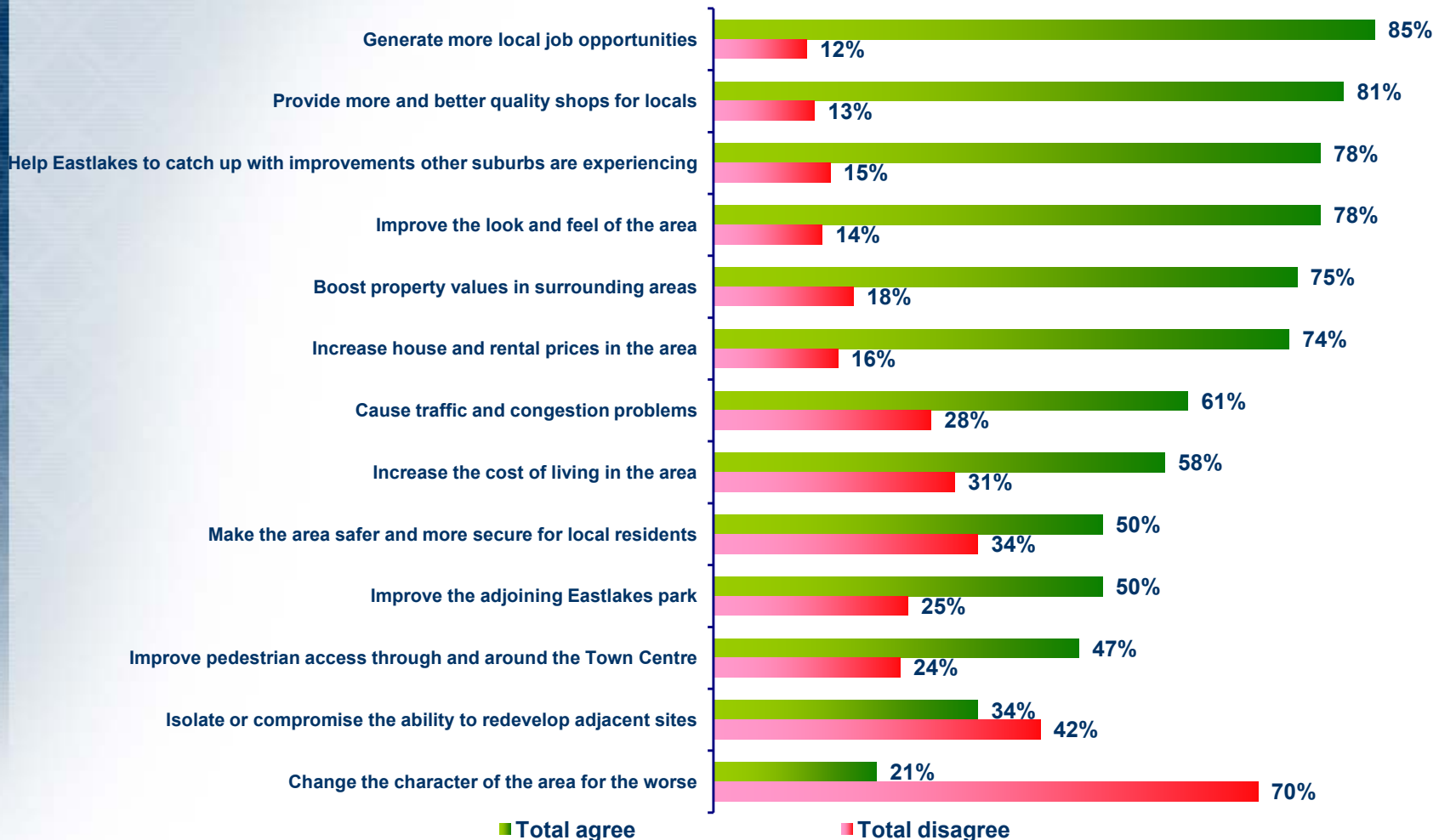


Messaging: What's driving opinions?

Q6) I am now going to read you a list of statements that other people have said about the proposed redevelopment of the Eastlakes Shopping Centre, both for and against. Regardless of your overall view, I want you to tell me whether you agree...



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS



*Total agree= % Strongly agree + % Somewhat agree Total disagree = % Strongly disagree + % Somewhat disagree

The most credible messages tends to relate to job opportunities, better quality shops, improvements in the area and boost property values.



Messaging: Regression Analysis



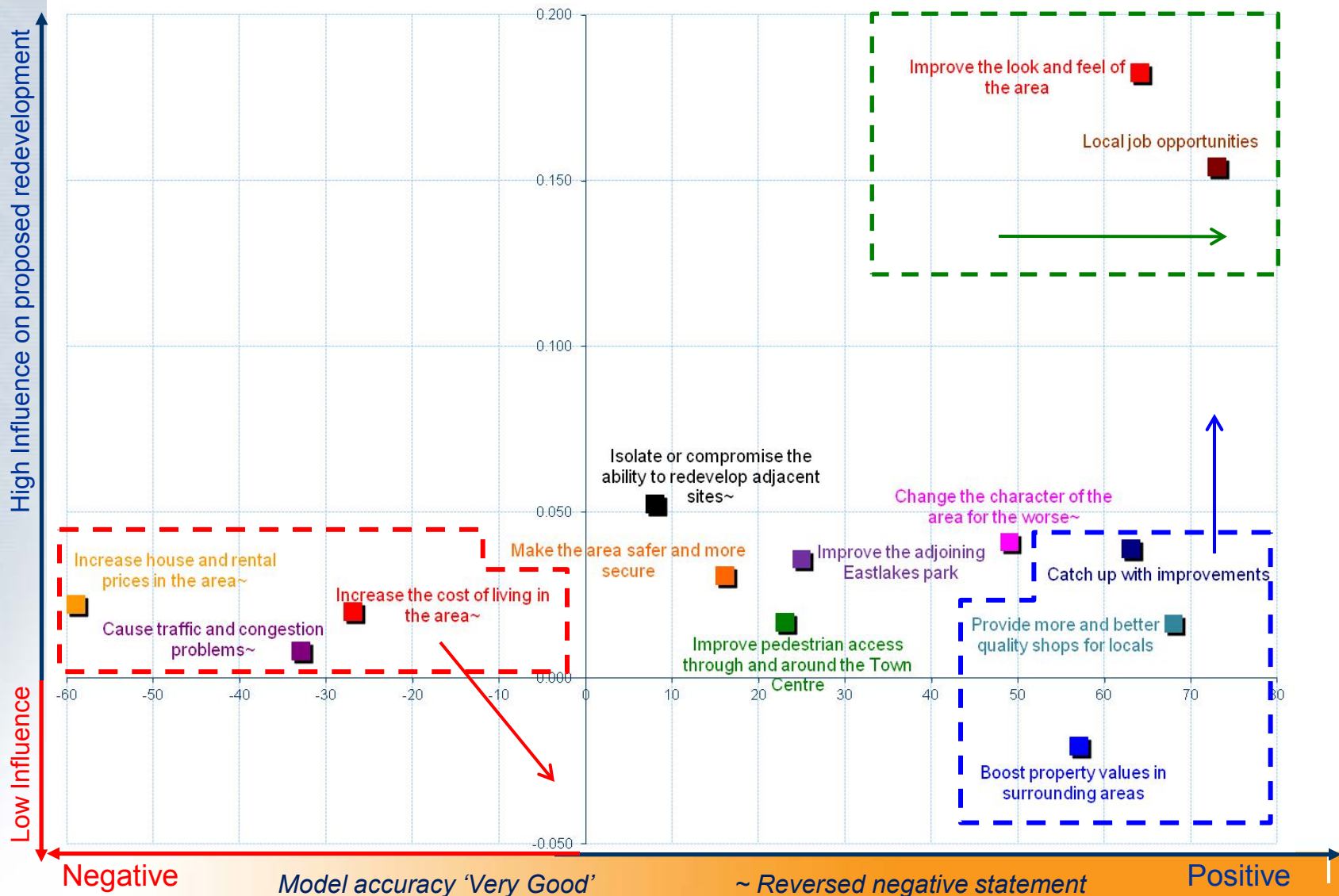
What is Regression Analysis?

- In this survey, the driver (regression) analysis predicts the most influential messages in persuading respondents towards supporting OR opposing the redevelopment. This is a measurement of the **credibility** of each message versus **influence** on support.
- The driver analysis is a statistical technique that allows you to:
 - > Estimate the influence of a range of inputs on a given outcome.
 - > Attempt to predict an outcome from these known inputs.
- Basically measures correlation between a given outcome and the range of inputs.
 - > The more times that an input agrees with the outcome the stronger the influence it is deemed to have.
 - > The more times a given input agrees with the outcome, whilst others disagree, the greater the certainty we have that it is a 'real' influence, i.e. is not just a coincidence.

Our support driver analyses explains the high level of support amongst residents by showing that the most positive messages are also those that are having most effect on support.



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS



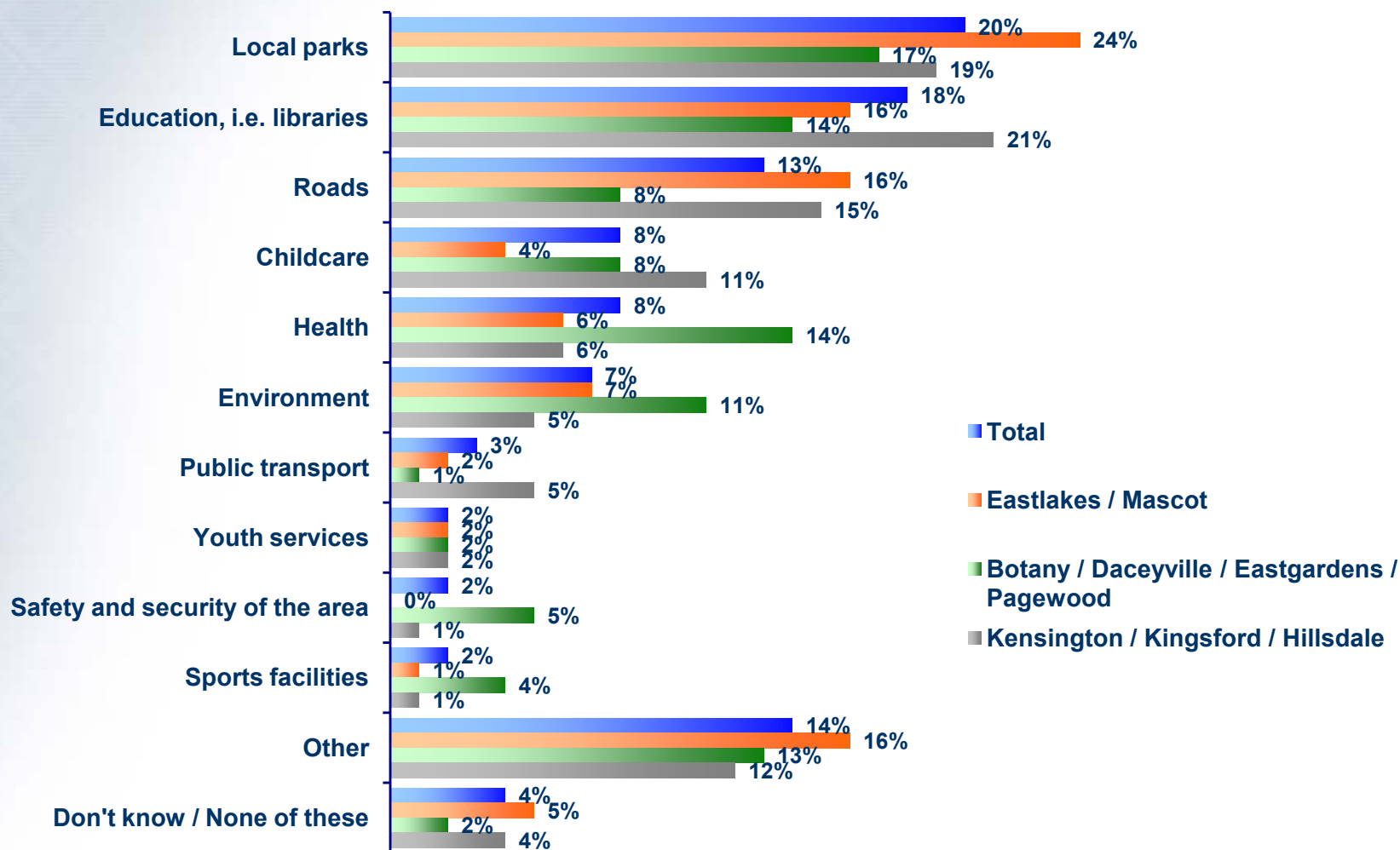


Infrastructure & Development

Q7) Whenever there is a large development in the area, the developer is obliged to invest a specific amount in the local community. In the case of the proposed redevelopment of the Eastlakes Shopping Centre, this is likely to be in the millions of dollars for local authorities to use for improving local services, infrastructure and amenities. Regardless of your overall views of the development, and assuming it goes ahead, in what specific area would you like to have this money invested in?



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS



When introduced to the idea of the development investing in the local community, local parks, education and roads were the main areas nominated.



Considered Opinion:

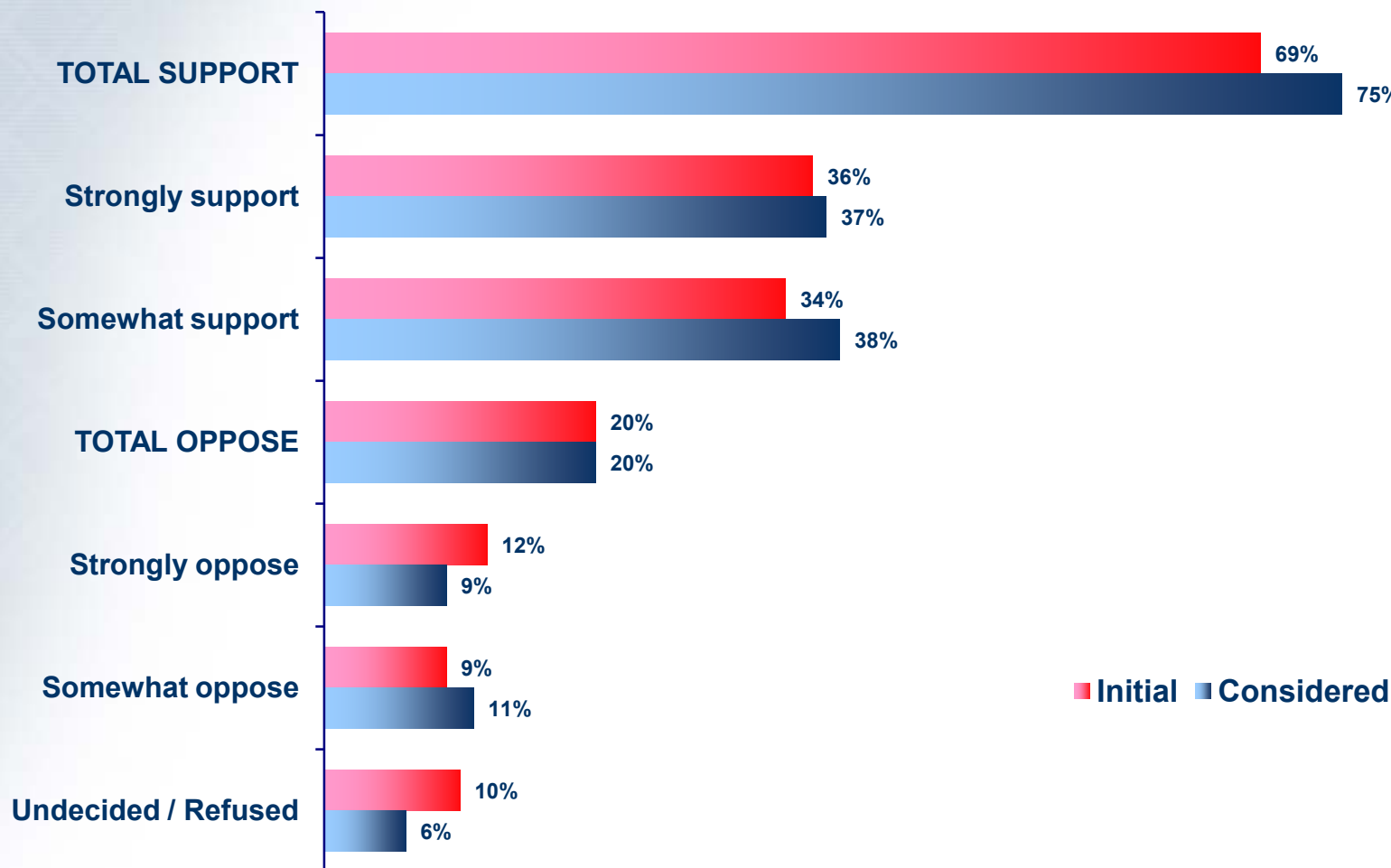
*What people think of the proposed development
after they've heard arguments
for and against.*

Q5) Based on what you know at this point in time, do you strongly support, somewhat support, somewhat oppose or strongly oppose the proposed redevelopment of the Eastlakes Shopping Centre to a new Town Centre?

Q8) Sometimes people have heard and considered various arguments FOR and AGAINST a proposal they can change their minds. Given this, do you now strongly support, somewhat support, somewhat oppose or strongly oppose the proposed redevelopment of the Eastlakes Shopping centre?



CROSBY | TEXTOR
RESEARCH STRATEGIES RESULTS



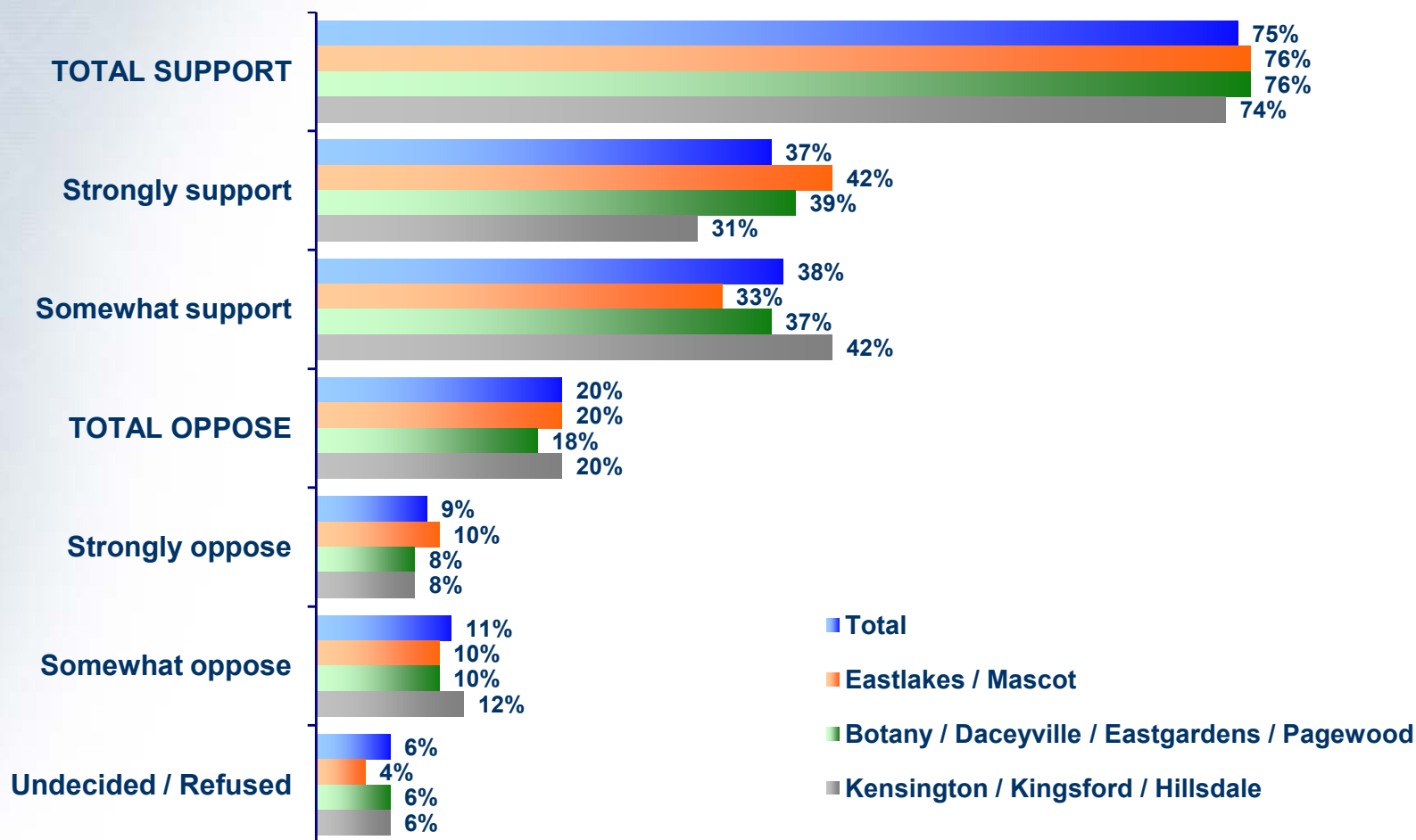
**Results rounded up or down*

**Total support= % Strongly support + % Somewhat support Total oppose = % Strongly oppose + % Somewhat oppose*

Exposure to messaging (positive and negative) and potential action was found effective at converting those currently undecided on the development to a position of support. Total support increased 6 points, while opposers remained the stable.



Q8) Sometimes after people have heard and considered various arguments FOR and AGAINST a proposal they can change their minds. Given this, do you now strongly support, somewhat support, somewhat oppose or strongly oppose the proposed redevelopment of the Eastlakes Shopping centre?



*Total support= % Strongly support + % Somewhat support Total oppose = % Strongly oppose + % Somewhat oppose

Total support is consistent across all areas, with residents from Eastlakes and Mascot more likely to 'strongly support' the redevelopment.



CROSBY|TEXTOR
RESEARCH STRATEGIES RESULTS

Eastlakes Development Research 2012

March 2012