



25th June 2020

Simon Militano

Development Director – Over 55's Development

Platino Properties

Suite 11, 20 Young St, Neutral Bay, NSW, 2089

Dear Simon

SKYLINE PLACE - FOCUS GROUP OUTCOMES REPORT

RESEARCH UNDERTAKEN

Platino Properties commissioned Marketability to conduct qualitative research among the prospective target market and influencers in the catchment area to understand the overall reaction to the over 55s location & concept and to gauge reaction and preferences for specific development design elements and facilities.

The co-creation qualitative research was held among a mix of Influencers (on behalf of a loved one) as well as among prospective purchasers aged 55+ looking to downsize in the Frenchs Forest area.

Fieldwork comprised:

- **Influencers:** 6 x 1 hour video in-depth interviews
- **Prospective Purchasers:** took part in overtime online focus groups (OTFG) using specialist secure platforms. The format means that participants contributed 3 hours of their time over a period of 3 days, and could access the platform at times convenient to them. These tightly moderated forums allow a deeper, more considered response than an equivalent face-to-face 3 hour engagement. Participants interact with the moderator and each other to discuss reactions and solutions. We spoke to a total of 32 participants in two separate forums:
 - o A 3-day OTFG for 55-65 age group (14 participants)
 - o A 3-day OTFG for the 65+ age group (18 participants)

There was an **overall positive reaction** to Project Skyline for an over 55s development at the specific location, particularly among the 65-75 age cohort.

SPECIFIC ISSUES COVERED IN THE RESEARCH:

A number of topics relating to elements of the future seniors living development in Frenchs Forest were explored through the focus groups sessions.

Participants were asked questions and shown concepts and visual depictions (rather than specific detailed designs) of various building elements and facilities to get feedback and preferences

REVIEW OF DEVELOPERS RESPONSE:

As part of our analysis we have reviewed the design changes now proposed by Platino Properties and commentary is provided as to how the current design responds to and addresses the feedback received during the focus group sessions.

1. Public Lobby versus Private Lobby

Participants preference for a Public lobby vs a Private lobby was explored by showing the following images and asking for comments:

Public lobby



Private lobby



Research Response

Participants were overwhelmingly in favour of a private lobby as it respects privacy and independence.

The following comments were provided:

- Security is as important as independence, however a 'meet & greet' concierge is seen as an expensive security measure.
- The large lounge lobby is seen as wasted space. While a 'hotel' concierge person is not necessary, from the service discussions we believe there is a need for a Building & Services Manager private/discreet office.
- There is a definite need to separate commercial and residential space – again a privacy as well as a security need.

The comments are demonstrated via observations as follows

"I don't want to feel like it's a Hotel or Office block before a private home. Prefer walk-through secure entry (non-smoking) with greenery"

Platino Response

In response to the feedback provided, the design incorporates the following elements/amendments:

The public lobby has been redesigned to a private lobby to clearly separate residents and commercial lobby entrances and lifts.

2. Separation of Commercial space and Seniors housing

Participants were shown the overall development layout and commercial space layouts.

Participants also discussed in detail:

- lobby entrances;
- the mix of commercial tenants proposed;
- the location of some of the community facilities – either in the commercial space as shared resources or in the resident development with resident only access.

Research response

It was clear that participants understood why some commercial space was planned for the development, but needed these securely separated from the residential space.

The following comments were provided:

- There was a general understanding of the practicality of having facilities and commercial entities that they may need to use on site, and that sharing these facilities with the broader public could make it more vibrant and financially viable.
- Participants were happy for a gym and a restaurant/café to be part of the commercial space.
- It was generally agreed that there should be no sharing of entrance with private residences; no shared lobby for accessing for example, gym, restaurant. Clear distinction of residential and commercial uses was preferred.
- Noise and privacy – a distinct separation between the commercial space and residential space was also seen as necessary for noise mitigation, people traffic and privacy reasons.
- Some did not like the fact that the commercial space on the ground floor **potentially reduced the green space** available to residents

The comments are demonstrated via observations as follows

“I would therefore prefer facilities to be in the commercial section separate from residential area – not private or secure, noisy”

Platino Response

In response to the feedback provided, the design incorporates the following elements/amendments:

Clear separation of commercial and residential space, including lobby entrances, parking areas, community facilities.

3. Rooftop area and green space

Participants preference for a roof-top area, which could include community gardens, BBQ areas and Lounge for residents, was explored by showing the following images and asking for comments:



Research response

Participants loved the idea of the rooftop as a private space for residents, not shared or close to the commercial areas. It took advantage of the view and gave another community lounge space and added to the appeal of the development in the specific location.

The following comments were provided:

- When we asked about the preferred location of a) the community garden – either at ground level or on the rooftop, there was equal interest in both options:
 - **Ground level** – involves more people from the community BUT is then not a private resident space
 - **Rooftop** - more private for residents and also more ambient. Needs to ensure that it is a pleasant experience in all weather conditions.
- There was interest in having garden areas in BOTH spaces as it was generally believed there was a lack of green outdoor space in the development.

The comments are demonstrated via observations as follows

“A rooftop community garden for residents appeals as it not only allows for fresh air and sun but would give good views all round”.

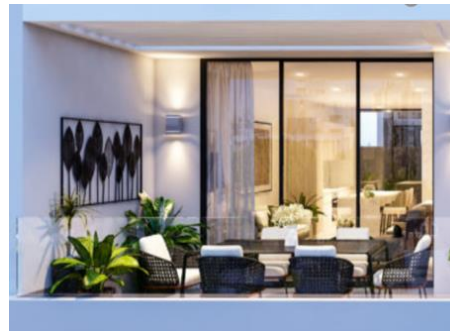
Platino Response

In response to the feedback provided, the design incorporates the following elements/amendments:

- Inclusion of a rooftop garden (approx. 250sqm of outdoor garden space) to encourage social interaction and active gardening.
- A small enclosed area to be constructed of a lightweight structure to allow all weather access to the area and BBQ gatherings. A small gym will be provided for those not using the over 50's gym proposed for the commercial area.

4. Balcony space

Participants preference for the size and nature of the balcony space and design was explored by showing the following images



Research response

Participants possessed a general consensus that a **large balcony** is required especially if there is no ground floor or garden units. There was no clear preference for either of the images shown.

The following comments were provided:

- The balcony adds to the outdoor enjoyment and need for downsizing on the Northern Beaches. Some of the balcony spaces was seen as small.
- Balcony choice would partly depend on aspect, as for example south-facing apartments would need winter weather protection while NE facing may need wind protection in summer.
- The need is for large balconies, that are light and bright and offer a distinct outdoor space.

Platino Response

Increased the size of balconies on smaller units and redesigned balcony spaces to provide a more open outdoor space and to create a more open balcony feel.

5. Design of Community facilities

Participants explored the 'must have' needs for community facilities and spaces and a poll was asked to be completed by each participant.

Research response

Participants overwhelmingly had the expectation of a community lounge and meeting spaces but also a high need for the possibility of social interaction and connection.

The following comments were provided:

- Participants felt that there was a high need for a restaurant and a gym, and were accepting that this should be located in the commercial area for more vibrancy and access.
- The possibility of social interaction and connection was seen as important – indeed this is one of the main drivers in selecting a senior development over any residential development.
- There is seen to be a need for a hub of activity – which includes wide open spaces, smaller activity rooms, a light-filled, bright and well-ventilated area, protected from the elements.

In addition to the focus group feedback, in the opinion of this author the current pre-research plans can be improved on several levels:

- With the exception of the restaurant and gym, other community facilities should not be located with commercial interests (security, privacy, noise issues)
- Current plans show a lack of ambient community connectivity – rather a series of separate rooms and no large community gathering space.

Platino Response

In response to the feedback provided, the design incorporates the following elements/amendments:

The proposed design change separates the space from commercial interests and it creates a community hub with interconnected activity spaces. It also appears to utilise light and cross ventilation to create an expansive ambiance. In addition, the rooftop area allows for a more reflective lounge space as well as an alternative gathering space.

Additional needs emerging from the research

In addition to the specific items mentioned about, research participants want to ensure:

Storage space:

Research participants want to ensure that any development include much more storage space than usual – especially as most households are downsizing – this includes parking bay storage as well as storage within all rooms – bathroom, kitchen, bedrooms.

Lifts:

In a vertical development it is essential to have lifts for senior living, and to have an adequate number of lifts for the volume of apartments. Participants wanted lifts mentioned in early promotional material both to confirm that there is level access to their unit, and that there is adequate provision in the case of emergency evacuation needs. Security needs also want a separation of lift access between residents and commercial interests.

Four stories require adequate lifts How many? Where will they be located in the building

Conclusion:

In summation, we reviewed the design changes as indicated above and found them a good interpretation of the market needs as reflected in the co-design research study.

Kind regards



Barbara Jones
Insights & Advisory Partner



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Appendix Marketability Credentials



Barbara Jones
Research Partner

**Barbara Jones, Insights & Advisory Partner Marketability – AMSRS, QPR
B.Comm (Marketing; Economics); Dipl Mkt Mngmnt; MBA; NLP**

Barb is the strategic customer experience research partner and has worked in the advertising, strategic planning and market research industry for the past 35 years in South Africa, SE Asia and Australia across a diversity of industries. She has specialist research expertise in both qualitative and quantitative methodologies, offline and online.

Over the years Barb has consulted across a wide diversity of industries. In the past decade she has developed extensive property development experience working with Marketability clients across a variety of different housing and care propositions in residential masterplanned communities, retirement living, land lease, supported living, and the aged care and home care sectors. Barb also lectures at UTS in post-graduate marketing & communication subjects. She is a frequent conference presenter, latterly on online qualitative techniques. When not consulting or lecturing, Barbara is found sailing on Sydney Harbour or singing in community choirs.

ABOUT US

We are a specialist consultancy to the master plan community, over 55's senior living and aged care industry.

Our Mission

Our mission is to help our clients create and deliver vibrant, successful and sustainable communities – simply great places for senior Australians to live



Research & Advisory

- Market & Competitive
- Customer Co-Creation
- Customer Value & Visioning Workshops
- Go to Market Advisory Workshops

Strategy & Community Engagement

- Business planning and feasibility
- Strategic marketing planning
- Strategic sales planning
- CRM
- Community Engagement

Marketing

- Direct marketing
- Digital marketing
- Marketing collateral
- Advertising / PR
- Display marketing
- Brand identity

Sales

- Sales training
- KPIs
- Customer service
- Financials
- Deposit and contracts
- Settlement and moving in