

14 October 2021

Moonee Valley Community Survey 2021 Results Summary

About the Community Survey

Brickfields Consulting have been engaged to conduct an annual community survey on behalf of the MVRC Joint Venture Development team. The purpose of this survey is to understand what is important to the people of Moonee Ponds. The information from the survey will be used to inform the Moonee Valley Racecourse (now Moonee Valley Park) Joint Venture Development team with an understanding of what is important to the Moonee Ponds community. The insights gained will inform the team's thinking as the vision for the site is developed, and as it evolves throughout the life of the project over the next 10-15 years.

2021 Community Survey Process and Context

The following summarises the key findings of the 2021 Community Survey. This is the fourth year the survey has been conducted. It was made available from 26 July 2021 until 3 September 2021. It was communicated through the 'Valley of Tomorrow' website, distributed through Hamton and Moonee Valley Park social media, distributed to the Community Reference Group (who were encouraged to share via their social media platforms) and distributed to the Moonee Valley Racecourse membership database. These 'community' responses were complemented by incentivised responses recruited through a digital platform with participants recruited based on geofencing of their mobile device within a 5km radius of Moonee Ponds.

In March of 2020, COVID-19 emerged in Australia. Level 4 restrictions were in place in Moonee Ponds for the majority of 2020 and much of 2021 (over 245 days at the time of writing this report).

This has likely led to some societal shifts and has limited the community's ability to interact with the Moonee Valley Park. With the easing of restrictions in alignment with vaccination rates, and commencement of community activations associated with the development, we expect that awareness and engagement with the development will increase further in 2022 and beyond.

Key Findings Summary

Response Profile

- A total of 493 valid 'community' responses, and 347 responses collected from online incentivised digital platform
- Respondents are categorised according to their relationships with the Moonee Valley area: 'Locals' – non-racing who live, work or live and work locally, 'Visitors' – non-racing who visit regularly/occasionally, and 'Racing' – live, work or visit because of racing including MVRC members.
- Overall, there were no significant changes to the age, gender or household profile year on year.
- In 2021, the profile was slightly younger, with a slight increase in responses from those under 35 years from 22% in 2020 to 28% in 2021.
- Consistent with previous years, many respondents had long standing associations with the Moonee Ponds area with 39% connected for 20 years or more. However, this year, there was an increase in the number of responses from those who have been associated for 1-5 years, up from 9% in 2020 to 28% in 2021.

Consistent perceptions of Moonee Ponds

- The three most endorsed statements describing Moonee Ponds all attracted around 80% agreement (agree or strongly agree): ‘I really enjoy being in Moonee Ponds’ (80%), ‘Moonee Ponds is a family friendly place’ (80%) and ‘Moonee Ponds is a desirable place to live’ (79%)
- The statements that were less endorsed related most to public life: ‘Moonee Ponds has a strong sense of community’ (73%), ‘Moonee Ponds provides adequate green open space for the community to enjoy’ (71%), ‘Moonee Ponds is a thriving dining and retail destination’ (68%) and ‘Moonee Ponds offers an array of community activities and events’ (65%). Statements that attracted the lowest level of agreement were also those that were most likely to be impacted by COVID-19 restrictions.
- The ‘best’ things about Moonee Ponds in 2021 were related to ‘parks and open spaces’, ‘proximity and location’, ‘cafes, food and beverage offers’ and ‘retail offers and local businesses’.
- The ‘worst’ things about Moonee Ponds focussed on ‘traffic congestion’, ‘development density’ and ‘parking’.

Overall advocacy for Moonee Ponds as a place to live

- Overall, 2021 saw improving advocacy towards Moonee Ponds as a place to live with an increase in Net Promoter Score (NPS) from +12 to +17. This was largely driven by a reduction in ‘passives’ (down from 50% in 2020 to 31% in 2021) and an increase in ‘promoters’ (up from 31% in 2020 to 43% in 2021).

The most pressing issues facing Moonee Ponds

- In 2021, ‘parking availability’ (48%) and ‘affordability’ (43%) remained the top two rated issues facing Moonee Ponds.
- Beyond parking and affordability, ‘provision of community amenities and facilities’ (27%) and ‘environmental and social sustainability’ (24%) ranked number 3 and 4, surpassing ‘transport infrastructure’ (23%) and ‘future residential development’ (22%), which were seen as more pressing issues in previous years.

What we’d like to see more of in Moonee Ponds

- The top four things respondents would like to see in Moonee Ponds in 2021 are: community activities (46%), food and beverage options (40%), urban public spaces (35%) and landscaping and greenery (35%).
- Community activities ranked number 1 in 2021 and has also featured in the top 3 for the past 4 years. Food and beverage options ranked at number 2 in 2021, slipping from the number 1 place in 2020.
- ‘Urban public spaces’ has also featured in the top 3 since 2019 and was rated almost equal to ‘landscaping and greenery’ in 2021.

How COVID impacted relationships with and perceptions of Moonee Ponds

- 38% of locals and 59% of racing audiences reported spending less time at retail outlets in Moonee Ponds due to COVID-19. Despite this, almost 40% of locals indicated their perception of Moonee Ponds as a place to live was more positive since the emergence of COVID-19.
- There was a significant difference in the importance ascribed to public spaces before and since COVID-19 lockdowns, increasing by 9%.
- The most frequent key themes amongst aspirations for change post-COVID included the provision of ‘green open spaces or streets’, ‘traffic management/transport improvements’ and ‘safety and COVID compliance.’

Views of Moonee Valley Racecourse Redevelopment (Moonee Valley Park)

- Positive sentiment towards Moonee Valley Park has steadily increased since an initial drop in 2019. In 2021, there was a higher level of agreement (agree or strongly agree) with all statements in the order of 12-17%
- In 2021, almost 70% agreed or strongly agree that Moonee Valley Park: would positively contribute to Moonee Ponds (67%), would be a community hub and recreation space for the Moonee Ponds community (65%), would become a new focus for entertainment and leisure in Moonee Ponds (67%); and would offer events and activations not previously offered in Moonee Ponds (64%).

What we'd like to see the MVRC Redevelopment (Moonee Valley Park) deliver

- The key themes amongst open-ended responses on what the community would like to see the MVRC Redevelopment deliver included outdoor public spaces and green spaces, cafes, food and beverage and dining options, community events and activities and a sense of community or community gathering spaces.