

MARKET AND CUSTOMER INSIGHT

THE MARKETABILITY DIFFERENCE

Development risk is an unavoidable factor of all building projects. Mitigating that risk and helping you make better informed decisions is how Marketability can help. With significant experience in the highly specialised senior living and aged care sector you will benefit from a team dedicated to helping you achieve the results you want. We have worked across large and medium sized developments contributing to the success of all projects with a combined market value in excess of \$5 billion dollars in aged care, retirement living and community care services.

Marketability Creating great places for older Australians to live

DEVELOPMENT

- Development Acquisition
- Development Management
- Site Advisory & Transaction Services

RESEARCH

- Market & Competitive Reviews
- Focus Group Research
- Portfolio & Hot Spot Analysis

MARKETING

- Direct Marketing
- Digital Marketing
- Marketing Collateral
- Advertising/PR
- Brand Identity
- Campaign Management

SALES

- Sales Management
- Sales Training
- Lead Qualification
- Reporting
- Deposit & Contracts
- CRM Implementation

Designed to minimise project risk and maximise returns along the development journey.



marketability

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INSIGHT TO SUCCESS

Each successful project starts with understanding the market, its potential and its barriers to entry. This is where our research team can help. We provide two reporting options:

1. MARKET AND COMPETITOR REPORTS

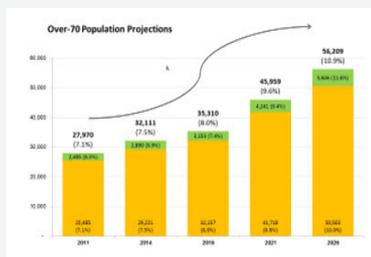
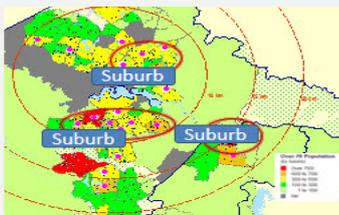
This option gives you current market knowledge and opportunities including price points, competitor analysis and future demand/supply.

2. CUSTOMER AND MARKET TESTING

This option provides analysis of design and purchase testing giving you deeper insight into your potential customer base through focus groups, telephone interviews or on-line panels or a combination of these methods.

You can choose from just one of these reports or both.

1. MARKET AND COMPETITOR ANALYSIS REPORT



Market and Competitor Analysis provides answers to various factors, including the capacity of the target market to absorb further development, price elasticity of the target market and the composition and nature of the competition. Each report provides detailed analysis and insights, as well as in-depth mystery shopping of your competitors to determine your market positioning.

The scope of the research will deliver key insight into these areas:

Catchment Area Determination

Determine the natural catchment from which the majority of prospective residents will be drawn.

Target Market Attributes

Profile and understand the key demographic factors that affect demand including "Hotspot" areas with a high density of the target market.

Competitive Environment

Identify existing competitors and the pipeline of proposed projects. Choose from analysing and reviewing published competitor data, site visits, mystery shopping and interviews with key competitors.

Needs / Gaps Analysis

Model demand versus supply scenarios to quantify the need for aged care services and seniors accommodation in 2021 and 2026.

Housing Prices, Net Equity & Affordability

Using Marketability's proprietary net equity modelling tool, establish how much the target market can afford to pay for their new homes. It goes beyond the traditional measures of housing prices and establishes the real wealth of households, giving you the depth of buyers at a range of price points.

Comparative Project Assessment

Compare the project with the existing and future market competitors and explore a comparative assessment of key project aspects, including:

- size for future development
- accommodation mix
- accommodation floor areas

2. CONCEPT AND CUSTOMER MARKET TESTING

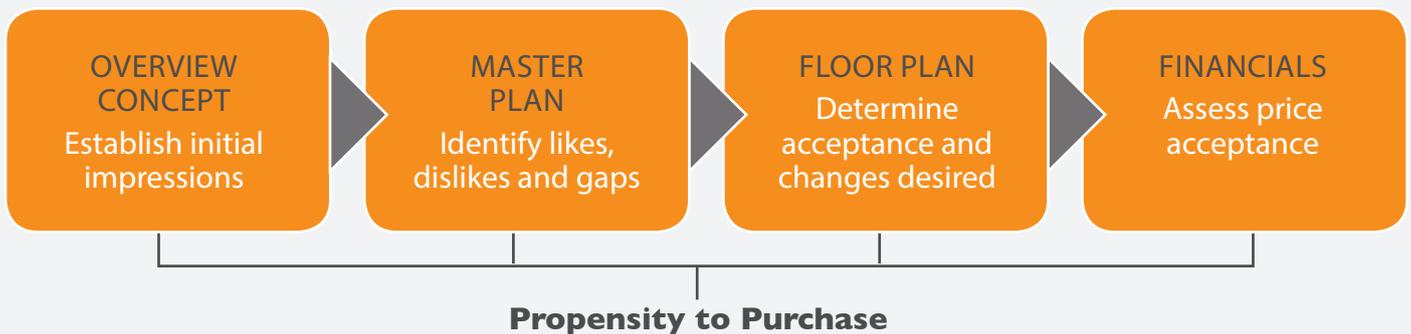
Concept and Customer Market Testing provides deeper understanding of the customer and potential market including prospective purchasers' triggers and behaviours, needs and wants and barriers to purchase. You can choose from various structured research protocols including telephone interviews, on-line panels and focus groups.

We will work with you to establish the most suitable research method which may be just one or a combination of the methods listed and depends on factors such as number of participants and range of geographical spread.

The results will give you a depth of understanding that will assist in your planning processes and take you beyond just the data. The scope of the research will provide feedback and analysis on the following elements:

- Development concept plans – building layout, floor plans, yield
- Accommodation and Care options
- Prospective customer pricing for all unit types
- Financial models – Business outcomes and customer offering
- Project Branding
- Consumer led designs and business strategies

EVALUATION PROCEDURE OVERVIEW



KEY OUTCOMES

The final report for Concept and Customer Market Testing provides a full summary of the various research components that have been selected and examined, providing not just the data but meaningful insight to help inform decisions and mitigate risk.

- Propensity to purchase and price sensitivity
- Affordability
- Response to proposed development branding
- Positioning and the point of difference within the local competitive catchment
- Initial reactions to the master plan and staging of development
- Optimised lot mix configuration
- Thoughts and feelings about community facilities
- Response to floor plans (RACF/ILUs/ILAs/SAs)
- Features desired in the development
- Most appropriate financial models
- Barriers to purchase and positioning (triggers for conversion)
- ROI and recommendations for investment in the design, construction and sales and marketing phases of the development

OUR RESEARCH TEAM

Our research team is composed of experienced research professionals and is led by the Managing Partners and the National Research Director. This means you will benefit from deep understanding of the market and cut through to the answers you need to assist and inform your decision making every step of the way.



David Lo Russo
Managing Partner

David founded Marketability in 1999 with a focus on research insights and delivering MROI for its clients. He has guided the growth of Marketability to become one of Australia's leading property consultancy to the residential, retirement living and aged sectors. David has successfully led over 400+ research projects, sales and marketing programs for developments with total market value in excess of \$2 billion.



Darren Timms
Managing Partner

Darren Timms has extensive Retirement Living and Aged Care experience having developed over 15 sites, 2000+ retirement living units and 1500+ residential aged care beds nationally. Darren brings his unique acquisition and development experience in this sector to the assessment of Marketability's research to determine key market insights and project recommendations.



Patrick Weissenberg
Partner

Patrick Weissenberg is a master researcher and strategist. He has extensive qualitative and quantitative research experience that provides him the authority and vision to devise effective brand and communication strategies. Within the Retirement Living sector Pat has conducted over 250 focus groups with retirees around Australia – positioning him to clearly represent the independent voice of the consumer.



Geraldine Sam
National Research Director

Geraldine Sam has over 15 years' experience within the Healthcare, Seniors Living and Aged Care sectors. Prior to joining Marketability, Gerry held senior research roles with international organisations like Jones Lang La Salle and Colliers International, providing specialist advice in the investment and development of property within these sectors across the Australian national market.

Our Clients value Gerry's market 'Insights', which provide the interpretation of the detailed data and research and enable the support of vital decisions to be made.

GET IN TOUCH TODAY TO SEE HOW WE CAN PROVIDE THE
ESSENTIAL CUSTOMER AND MARKET INSIGHT YOU NEED

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