



Additional documents

Strategic and General Services Committee

Wednesday 8 July 2026 6:30 pm



Table of Contents

SGSC2607-4 FREMANTLE OVAL REDEVELOPMENT BUSINESS CASE	3
--	----------



SGSC2607-4 FREMANTLE OVAL REDEVELOPMENT BUSINESS CASE

**Additional Attachment 2: Heritage Oval Precinct Redevelopment -
Quantum Market Research (July 2026)**

Quantum
Market
Research

Heritage Oval Precinct Redevelopment

Prepared for City of Fremantle

July 2026



Background and objectives

The proposed Fremantle Oval Heritage Precinct represents a significant opportunity to create a community-accessible destination that combines sporting, heritage and civic infrastructure while supporting the long-term future of football in Fremantle.

Given the scale of the proposed public investment, there was a need for robust, independent evidence to understand community attitudes towards the redevelopment, the role of football within the precinct, and expectations of government investment.

The primary objectives of the research is to understand:

- Community awareness and support for the proposed Heritage Precinct redevelopment.
- The perceived value and benefits of the Heritage Precinct compared with a more limited football-focused redevelopment.
- Community expectations regarding the role of football, including the Fremantle Dockers, within the future precinct.
- Whether the Heritage Precinct aligns with broader community expectations of public investment and delivers meaningful value for the Fremantle community.



Methodology



Quantitative survey conducted through online interviews with participants sourced from PureProfile (a market-leading ISO accredited online panel)



The sample included n=1,007 respondents from Perth Metro and Fremantle, with the data weighted to be representative of the state population by age and gender.



Fieldwork was conducted between 5th – 20th June 2026, and the average survey length was 13 minutes



The maximum margin of error (at the 95% confidence interval) on the total sample size is +/-3.1%. Where significance testing has been shown, results are significant at the 95% significance level of confidence



The project was carried out in line with the Market Research International Standard, ISO 20252.



Executive Summary

The community viewed the Heritage Precinct as a meaningful investment in Fremantle, but expected public funding to deliver more than a football-only focus reflecting the desire for far-reaching community benefits.

Broad benefits to the community was the strongest driver of support

Once explained, there was strong overall support for the Heritage Precinct (75%).

The most compelling messages were those centred on serving many audiences (82%) and improving community safety (81%). Leveraging these two messages will resonate with 89% of community members.

Even people who were unlikely to use the precinct personally recognised its value for the broader community (79%).

Support is earned by positioning the precinct as public infrastructure, not sporting infrastructure.



Community members recognised the larger investment, but still saw greater public return from the larger precinct redevelopment

Respondents consistently preferred the full Heritage Precinct over a football-focused redevelopment (56% vs. 15%).

Despite the larger investment, the full redevelopment was considered to deliver greater value (43% vs. 28% smaller investment).

Public investment was expected to maximise community outcomes (41%) rather than benefit a single organisation (4%), though preference is for a balanced approach (50%).

Community members placed greater value on investment that delivers broad community benefit than on lower-cost investments with a more singular focus.



Football supports the case for redevelopment by reinforcing Fremantle's identity

Football should remain part of the redevelopment, but not its sole purpose (69%).

There was strong support for retaining Fremantle's ability to host major football events in the future (78%), and that Fremantle Docks maintains a meaningful connection to Fremantle (82%).

Fremantle Oval was the preferred location for future government investment (46%) over alternative venues, reinforcing the community's desire to retain elite football in Fremantle.

Football strengthens the case for redevelopment by reinforcing Fremantle's identity and its connection with the Fremantle Docks, but it does not outweigh broader community benefit.



To strengthen support for the Fremantle Oval Heritage Precinct upgrades:

Lead with community benefit

Position the redevelopment as a precinct delivering year-round value for families, community groups, visitors and residents.

Demonstrate the value of investing once, properly

Frame the full redevelopment as a long-term investment that maximises community return.

Use football to reinforce the story

Highlight football's contribution to Fremantle's identity, visitation and heritage, while positioning it as one element of a broader community precinct.

Tailor local communications to reflect football's importance

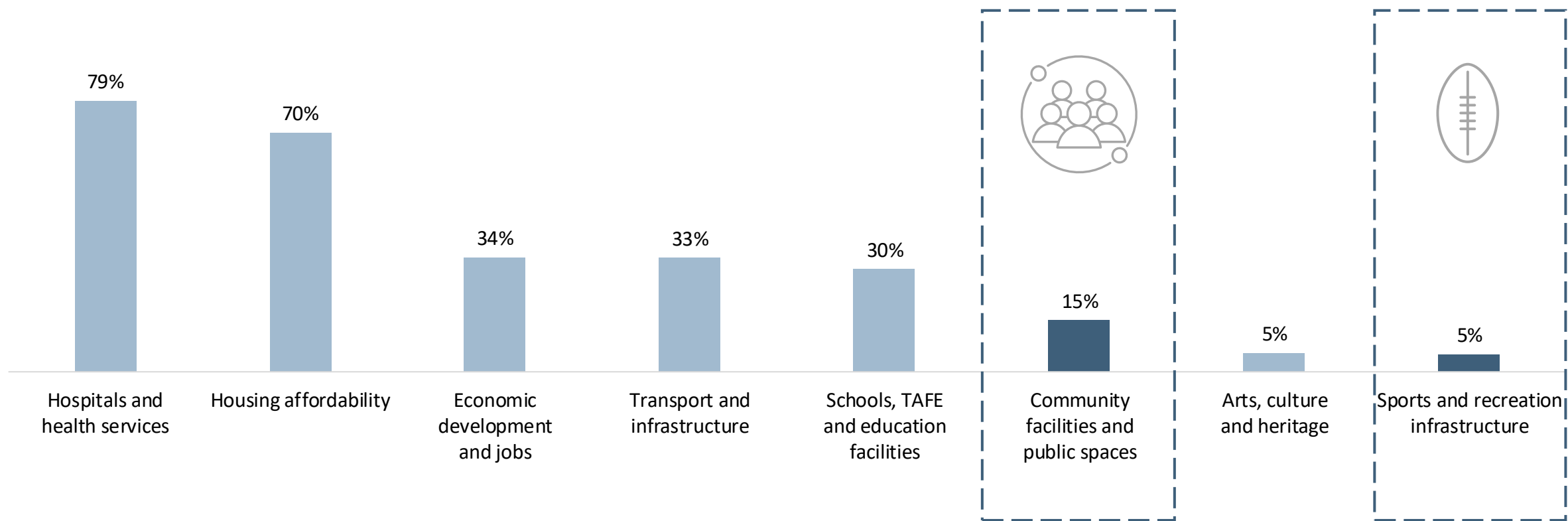
Lead with community benefit, but emphasise football, heritage and the Docks connection in communications with Fremantle residents.

Detailed findings

Prior to the Heritage Oval proposal, there was already belief that government investment should prioritise projects that benefit the broader community

Government investment was expected to prioritise broader community infrastructure

Government priorities in public infrastructure



Q4. Thinking about major public investment, which of the following do you think governments should prioritise? Please select up to three responses?
Base: Total sample (n=1,007)

There was near-universal expectation that major public projects deliver broad community benefit

Importance of public projects delivering broad community benefits

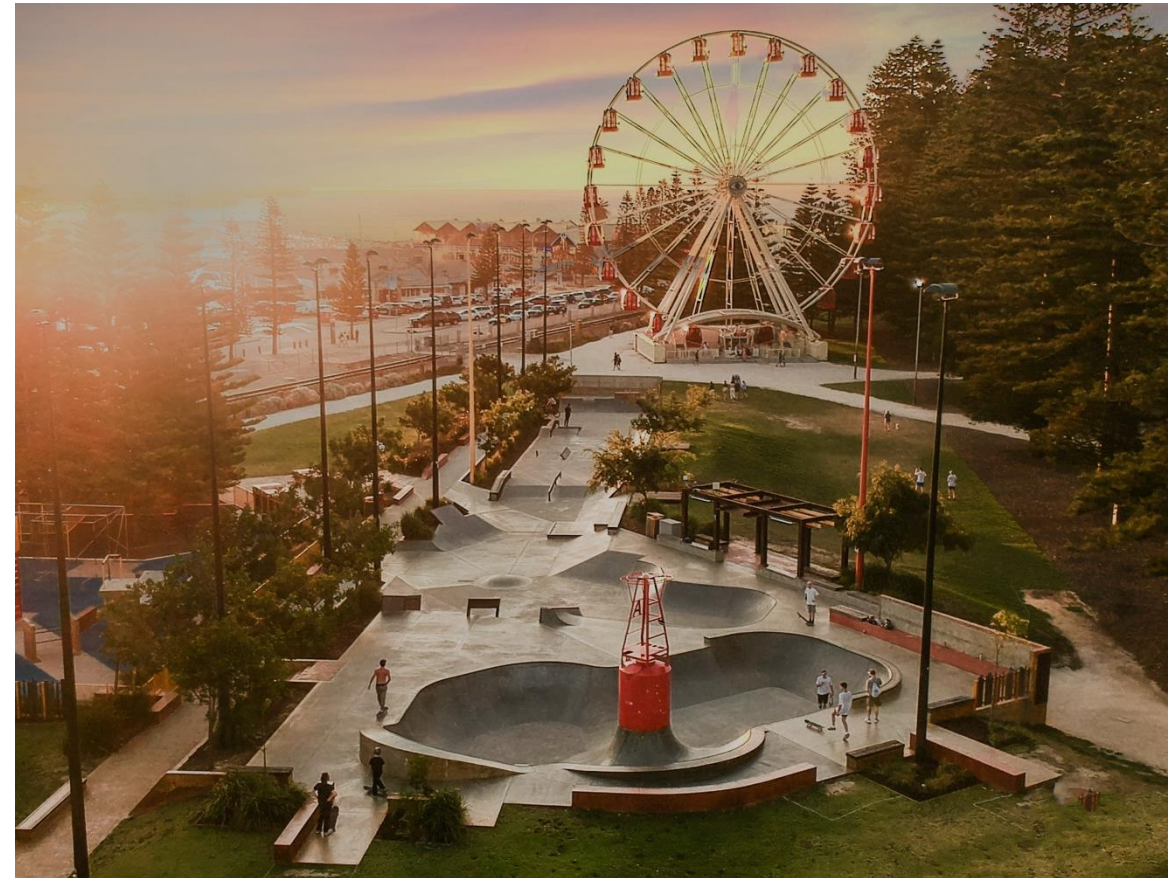
93%

believed it is important major public projects deliver benefits to a broad range of the community.

1% believe it is not.

5% thought neither.

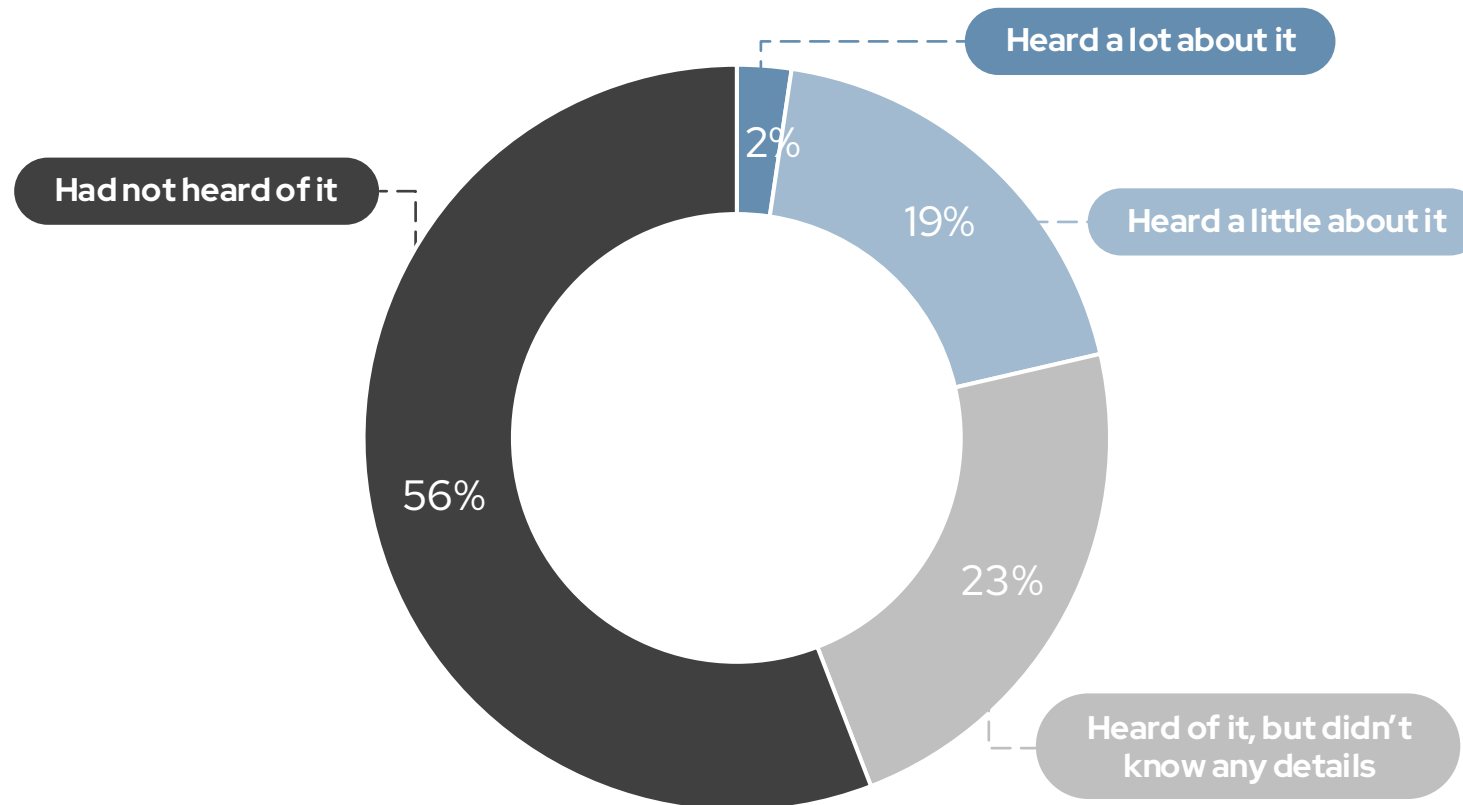
Q5. How important is it to you that major public projects deliver benefits to a broad range of the community?
Base: Total sample (n=1,007)



The strongest advocacy narrative positions the redevelopment as a safer, more active precinct delivering benefits for the whole community.

Limited awareness presents an opportunity to shape community understanding of the proposal

Awareness of Heritage Precinct redevelopment proposal



Awareness levels among key cohorts:

- Fremantle locals were significantly more likely to have 'heard a little about it' (**28%**) than Perth metro residents (**18%**)
- Women report hearing less, with significantly higher 'have not heard of it' (**63%**) than men (**48%**)

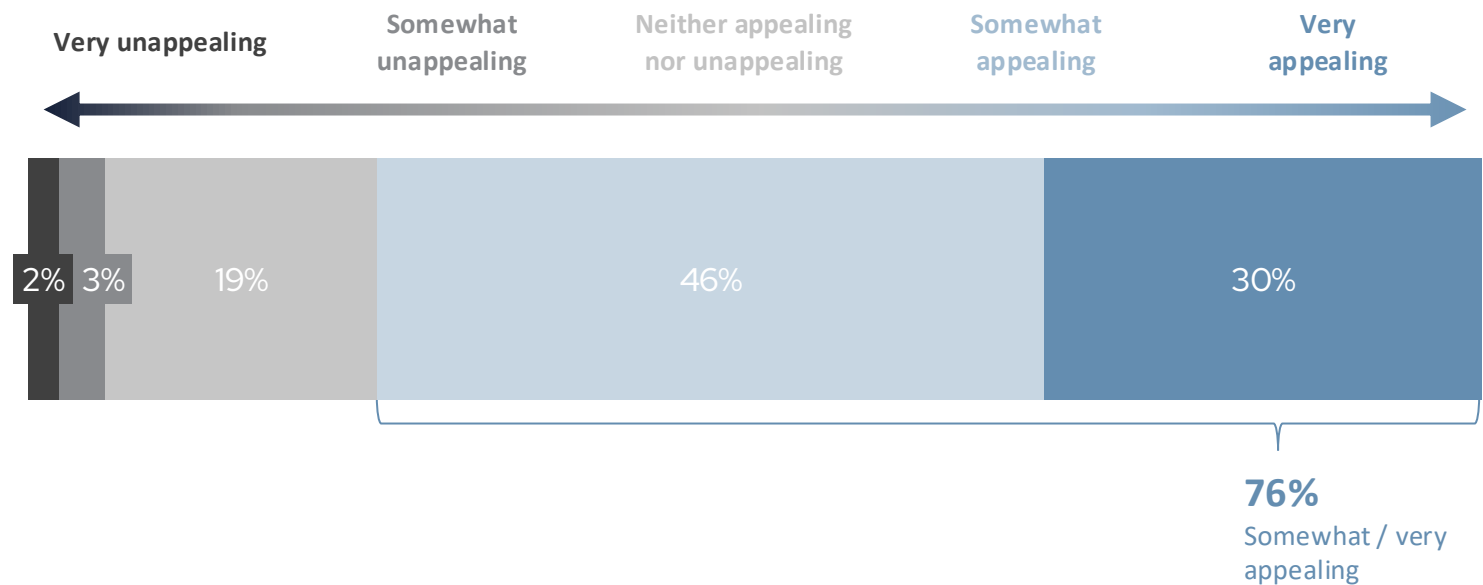
Q6. Before today, how much had you heard, if anything, about the proposed redevelopment of the Fremantle Oval site?
Base: Total sample (n=1,007)

■ | ■ Significantly higher/lower than other groups combined

Confidential - Not for Public Consumption or Distribution

The Heritage Precinct concept generated strong initial appeal

Heritage Precinct redevelopment appeal



Appeal levels among key cohorts:

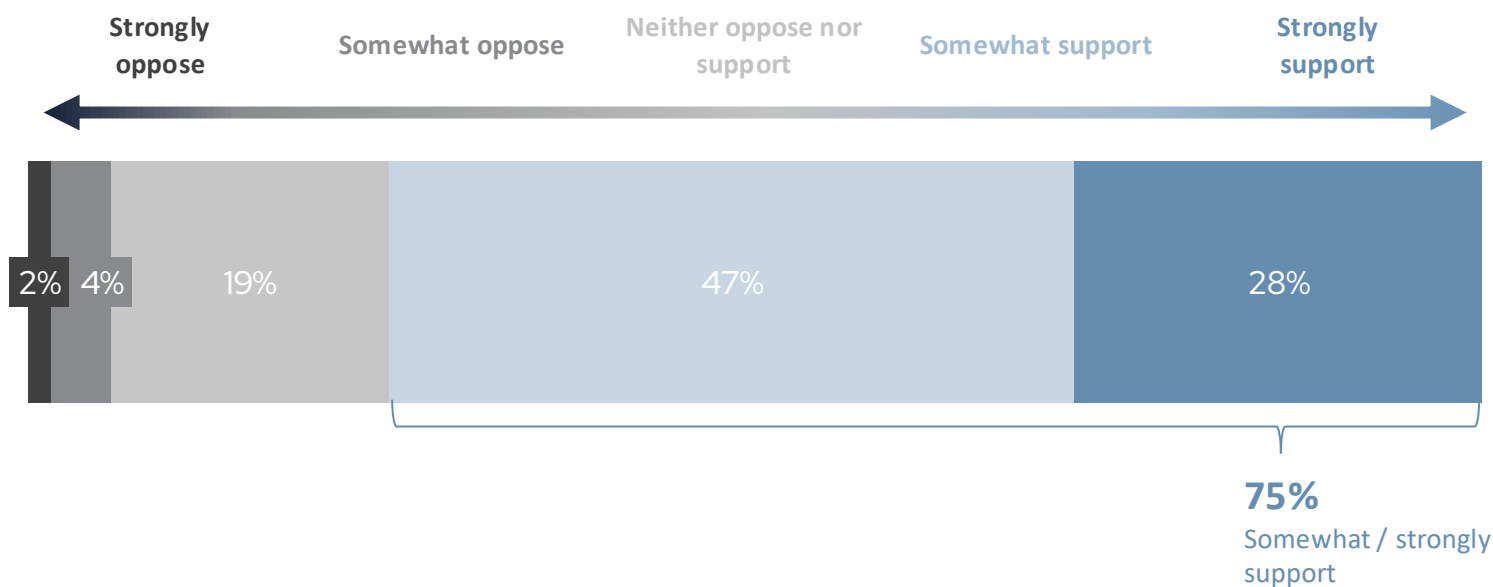
- Those who had heard about it were significantly more likely to find the precinct appealing (**86%**) compared to those who have not heard about it (**68%**)

Q7. Overall, how appealing do you find this concept for the Fremantle Oval Heritage precinct?
Base: Total sample (n=1,007)

■ | ■ Significantly higher/lower than other groups combined

The redevelopment attracted strong community support, with minimal opposition

Heritage Precinct redevelopment support



Support among key cohorts:

- Magnitude of support was higher among Perth metro residents (strongly support: **29%**, somewhat support: **45%**) than Fremantle locals (strongly support: **16%**, somewhat support: **62%**) – resulting in similar overall support (75% Perth metro residents, 78% Fremantle locals).
- Men had stronger support of the redevelopment (**78%**) than women (**72%**)
- Those aware of the proposal had higher support (**87%**) compared to those who have not heard about it (**67%**)

Q8. Overall, based on this information, to what extent do you support or oppose the proposed Fremantle Oval Heritage Precinct?
Base: Total sample (n=1,007)

■ | ■ Significantly higher/lower than other groups combined



75%
Supporters

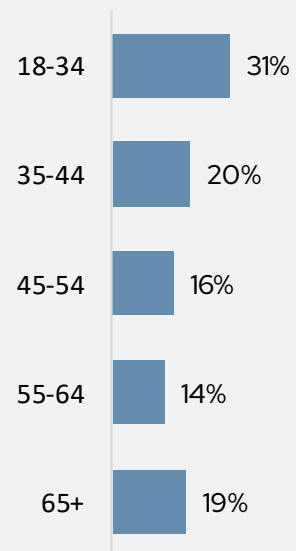
n=756

✗ | ✗ Significantly higher/lower than other groups combined

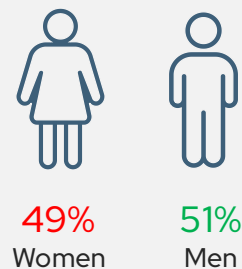


WHO ARE THEY?

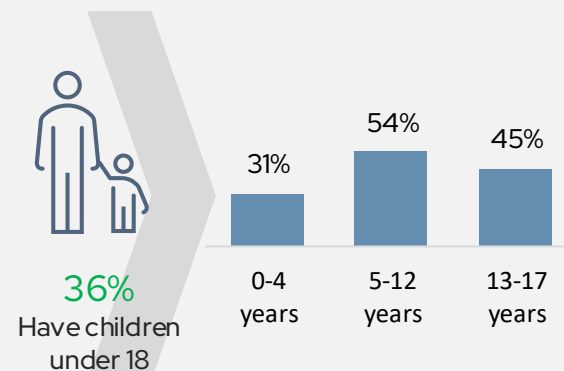
AGE (years)



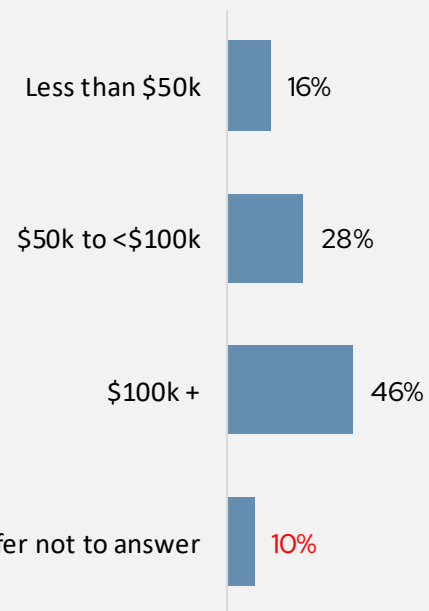
GENDER



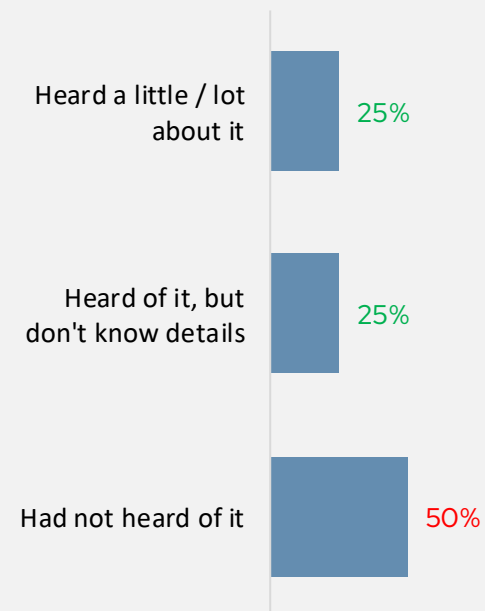
WITH CHILDREN



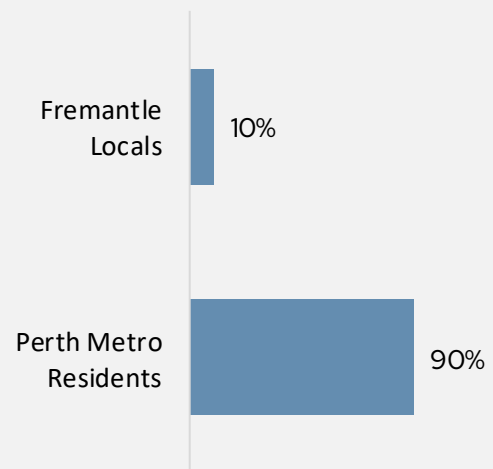
ANNUAL HOUSEHOLD INCOME



AWARENESS OF PROPOSITION



REGION





6%
Opposers

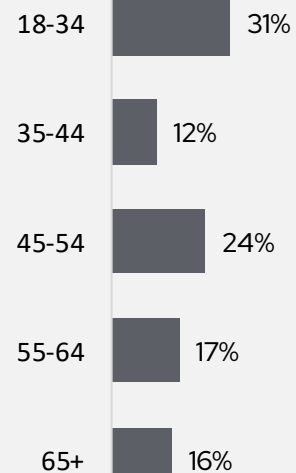
n=58

■ | ■ Significantly higher/lower than other groups combined

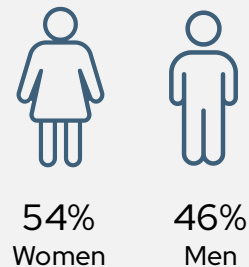


WHO ARE THEY?

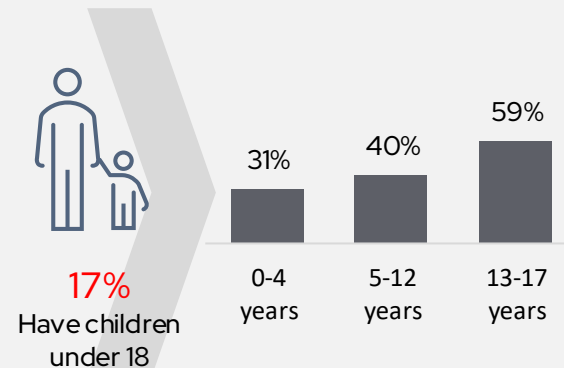
AGE (years)



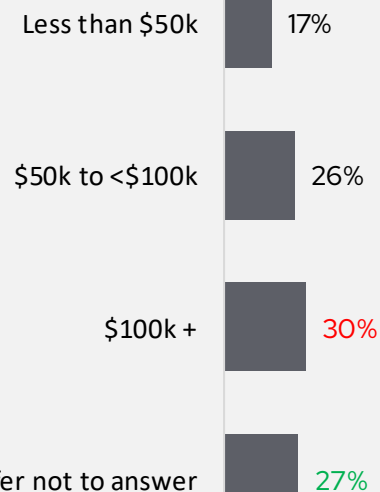
GENDER



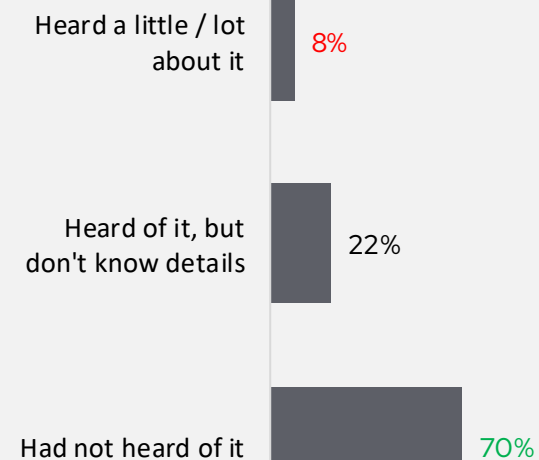
WITH CHILDREN



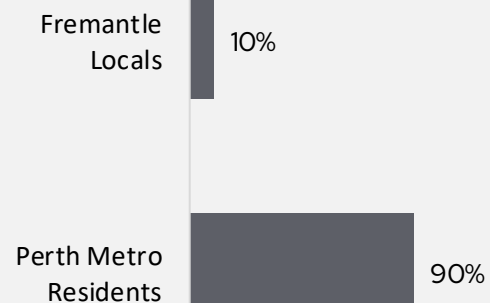
ANNUAL HOUSEHOLD INCOME



AWARENESS OF PROPOSITION

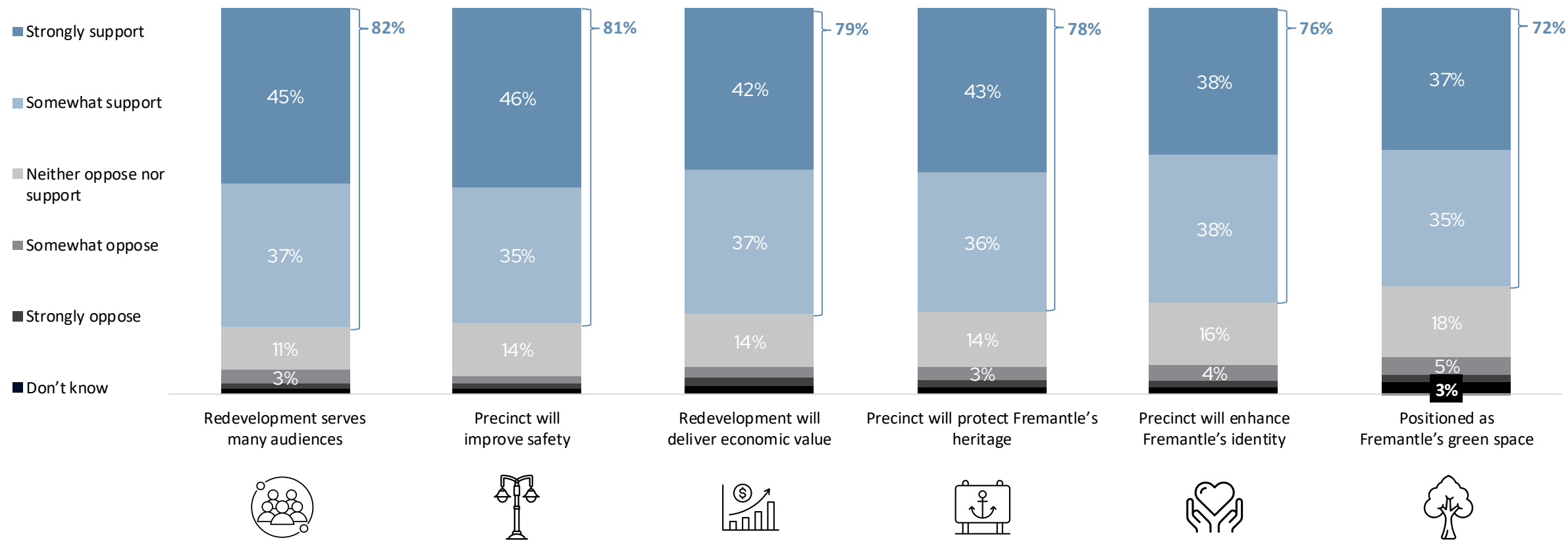


REGION



Messages highlighting community accessibility and improved safety resonated most strongly

Message impact on support for the Heritage Precinct redevelopment

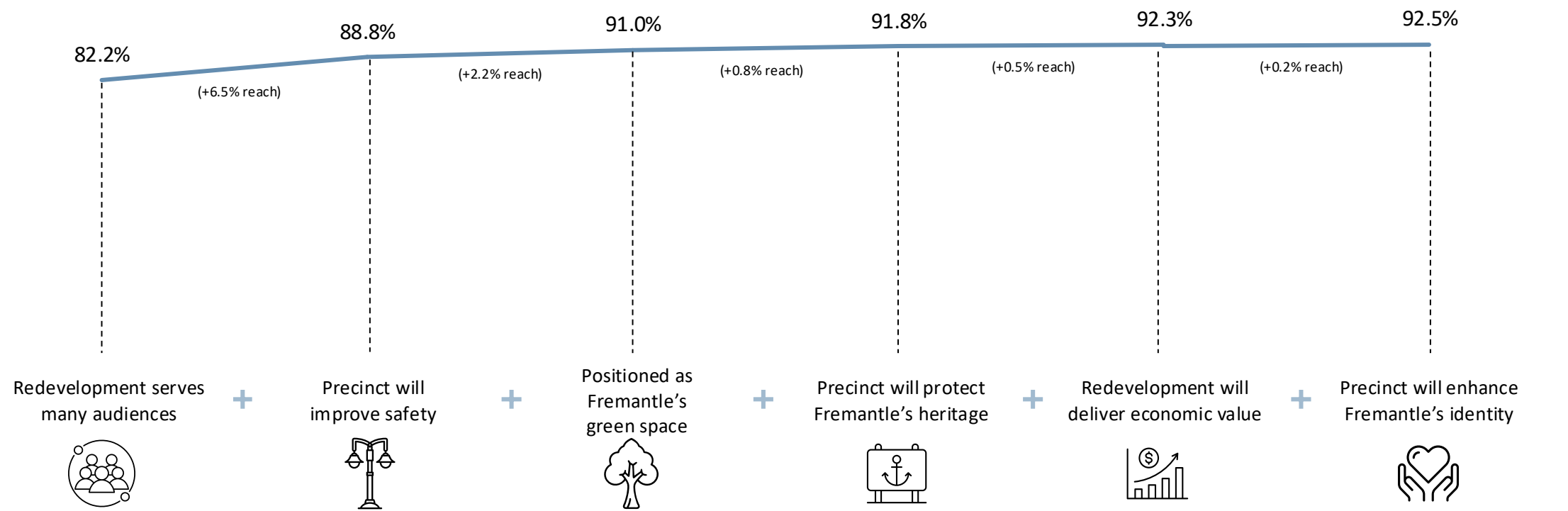


Q9. To what extent would you support or oppose the Fremantle Oval Heritage Precinct, based on each of the following? Labels <3% not shown, note labels have been shortened for presentation purposes
Base: Total sample (n=1,007)

Accessibility and safety provide broadest reach, with additional messages reinforcing support

Total incremental reach of messaging for the Heritage Precinct redevelopment | TURF

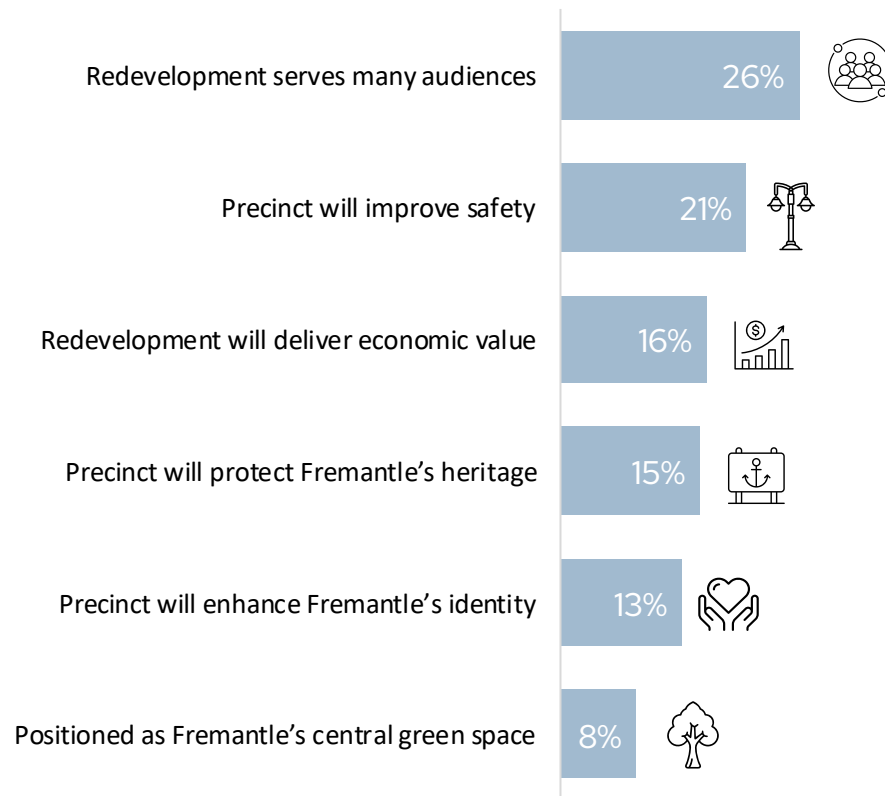
- Total Unduplicated Reach & Frequency (TURF) shows the potential reach of messaging.
- Reach represents the proportion of the community likely to be persuaded by at least one message.
- Each step shows the additional unique audience reached by adding another message.
- Once community benefit and safety are included, further messages add relatively little new reach.



Q9. To what extent would you support or oppose the Fremantle Oval Heritage Precinct, based on each of the following? Note labels have been shortened for presentation purposes
Base: Total sample (n=1,007)

Safety was not only a compelling message overall, but the one most likely to resonate with opposers

Main message impact on support for the Heritage Precinct redevelopment



Main message resonance among key cohorts:

- Safety consideration was the most important factor among Opposers (**36%**) compared to Supporters (**18%**). Redevelopment that serves many audiences was stronger for supporters (**28%**). Leveraging the safety message may improve project resonance with those who currently oppose it.
- Fremantle's heritage character was a more significant reason to support for Fremantle locals (**24%**) compared to Perth metro residents (**14%**)
- Fremantle's identity and character resonated more strongly with those under 35 (**17%**)
- Men resonated more strongly with economic messaging (**18%**) than women (**14%**), whereas women resonated more strongly with heritage messaging (**18%**), than men (**13%**)

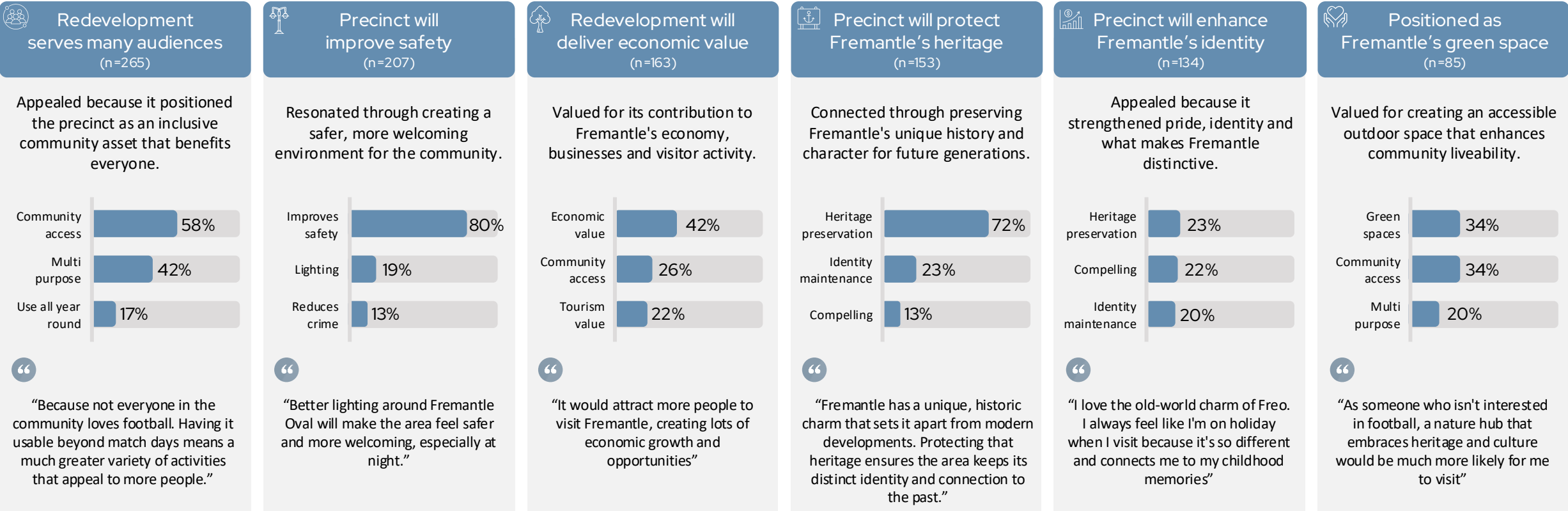
Q10. And which one of these reasons is most likely to make you support? Note labels have been shortened for presentation purposes
Base: Total sample (n=1,007)

✕ | ✕ Significantly higher/lower than other groups combined

Confidential - Not for Public Consumption or Distribution

While community benefit drives support, each message contributes a unique proof point

Reasons for messaging preference



Q11. You said [Q10 response] was most compelling to you personally. Can you please tell us, in as much detail as you can, why that is? Note labels have been shortened for presentation purposes
Base: Total sample (n=1.007) , split as above

The Heritage Precinct was viewed as delivering community value beyond personal use

Perception of community value

79%

perceived the redevelopment as valuable for the community, even if they wouldn't personally use it.

10% did not.

11% didn't know.

Q13c. And even if you didn't personally use the precinct often, would you still see value in it existing for the wider community?
Base: Total sample (n=1,007)



If government invests, the community want investment that creates lasting public value rather than a lower-cost upgrade benefiting a single organisation.

The two redevelopment options were described as follows, with the order they were shown in randomised to remove order bias



FULL REDEVELOPMENT

A redevelopment of the Fremantle Oval as part of the Fremantle Oval Heritage Precinct is proposed to become a staged, mixed-use precinct delivering sport, community facilities, public green space, year-round activation, and preserving heritage.

Estimated total investment over time: around \$160 million.



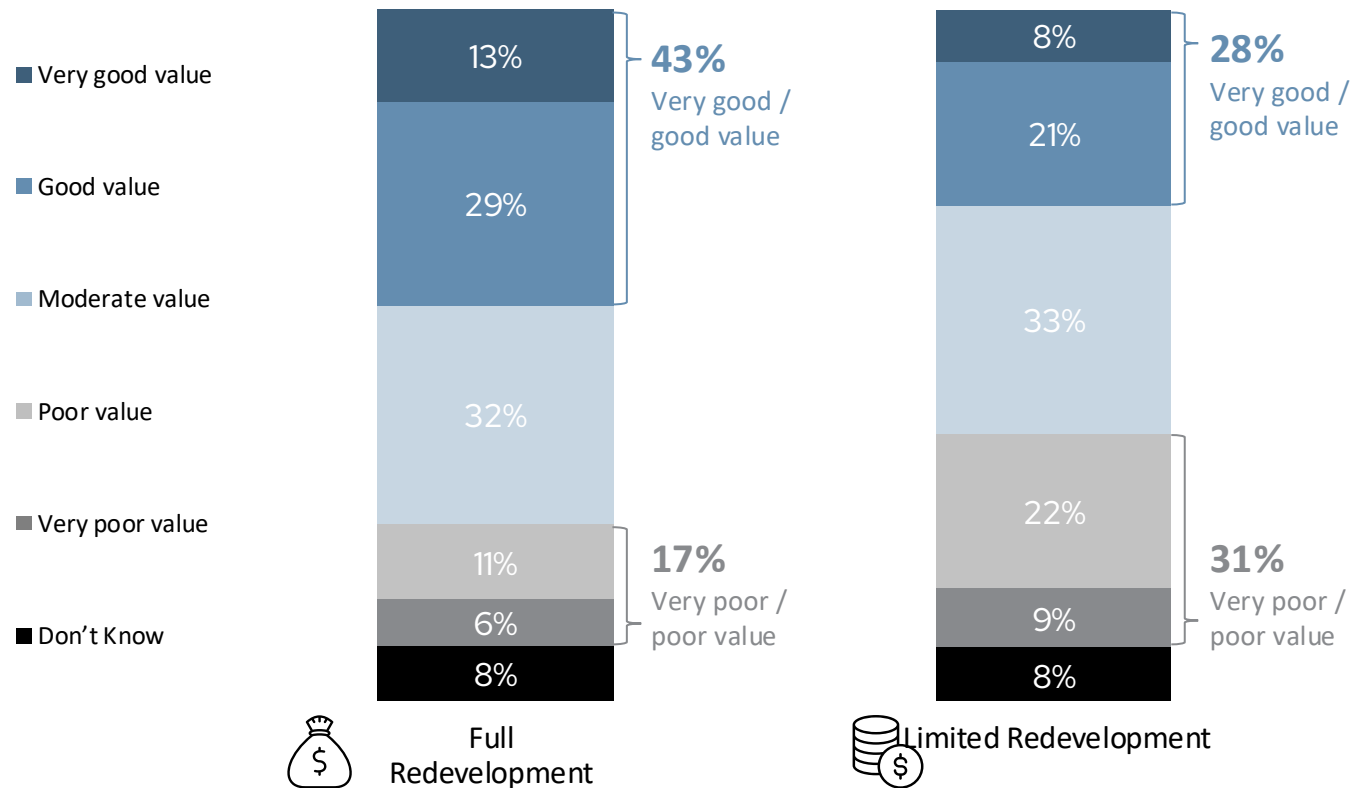
LIMITED REDEVELOPMENT

A limited redevelopment of the Fremantle Oval has been proposed to focus primarily on upgrading the football oval and facilities to support South Fremantle Football Club as the primary and ongoing user of the site, with limited broader community use or precinct development.

Estimated investment: around \$55 million.

Respondents saw greater value in the full redevelopment, despite its larger investment

Perception of value for redevelopment options



Value of redevelopment options among key cohorts:

Full Redevelopment

- Supporters had significantly stronger perception of value (**53%**) than Opposers (**10%**)
- Men had significantly stronger perceptions of good value (**49%**) than women (**37%**)
- Those aged 55-64 were significantly more likely to believe the redevelopment would be poor value (**24%**)
- Those aware of the project had stronger value perceptions (**56%**) than those who had not heard of it (**35%**)

Limited Redevelopment

- Supporters had significantly stronger perception of value (**33%**) than Opposers (**16%**)
- Men believed the project would be good value (**35%**) compared with women (**22%**)
- Those under 35 had higher perception of value (**33%**)
- Those aware of the project had stronger value perceptions (**46%**) than those who had not heard of it (**21%**)

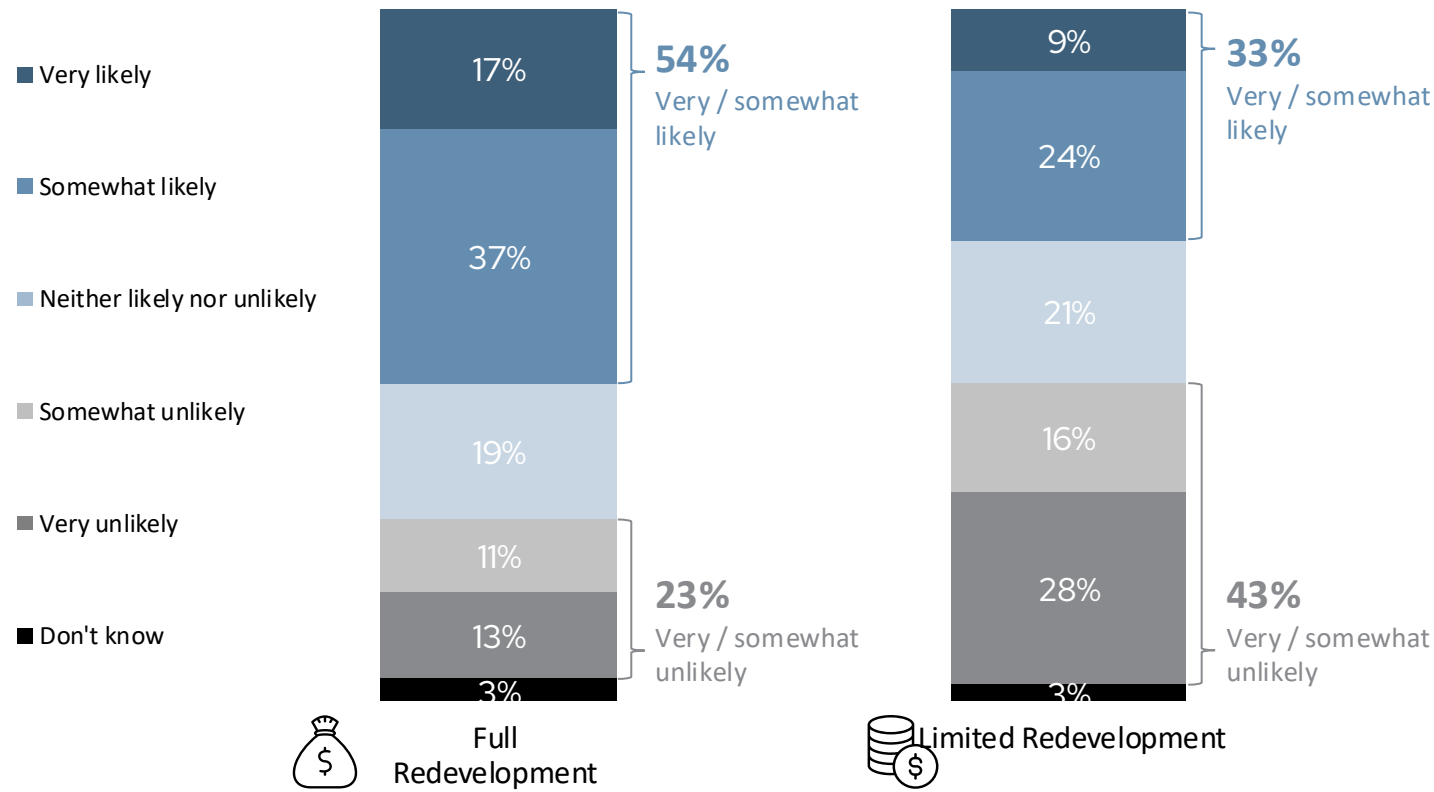
Q12a. What level of value do you believe this represents for public investment? Q13a. What level of value do you believe this represents for public investment?
Base: Total sample (n=1,007)

■ | ■ Significantly higher/lower than other groups combined

Confidential - Not for Public Consumption or Distribution

The full Heritage Precinct generated stronger intended use than the football-only redevelopment

Likelihood to use redevelopment options



Likelihood of use among key cohorts:

Full Redevelopment

- Fremantle locals were significantly more likely to use the precinct (68%), than Perth metro residents (53%)
- Supporters had significantly higher likelihood of use (66%) than opposers (10%)
- Men had higher likelihood of usage (59%) than women (49%), with women more unlikely to use it (26%, vs. 20% men)
- Those aware of the project had stronger value perceptions (74%) than those who had not heard of it (43%)

Limited Redevelopment

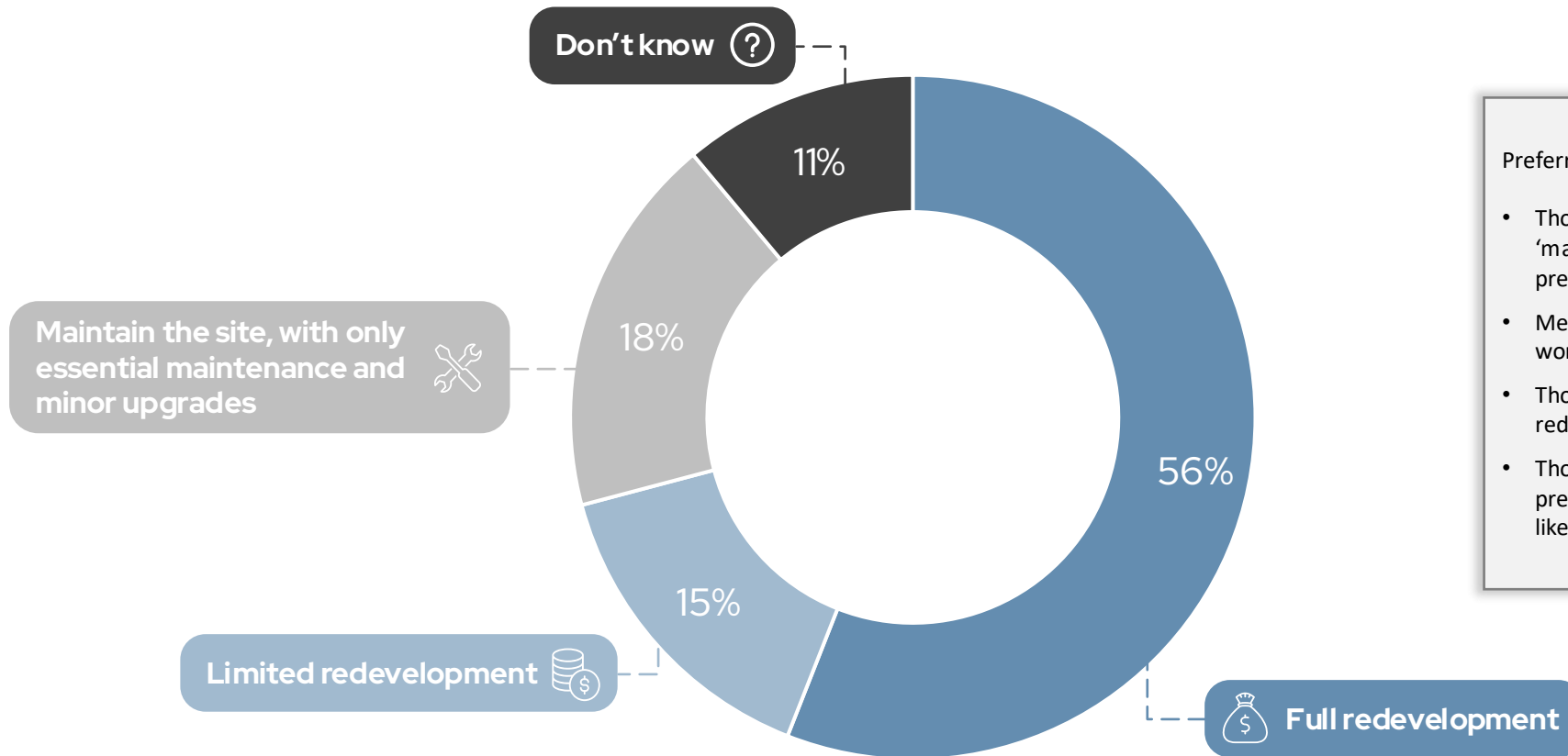
- Fremantle locals were more likely to use the precinct (48%), significantly more than Perth metro residents (32%)
- Men had higher likelihood of usage (40%, vs. 27% women), with women more unlikely to use it (50%, vs. 37% men)
- Supporters had significantly higher likelihood of use (41%) than opposers (9%)
- Those aware of the project had stronger value perceptions (55%) than those who had not heard of it (23%)

Q12b. If this redevelopment went ahead, how likely would you be to attend or use the precinct? Q13b. If this redevelopment went ahead, how likely would you be to attend or use the venue?
Base: Total sample (n=1.007)

Green X | Red X Significantly higher/lower than other groups combined

Where respondents did not support the full redevelopment, they preferred the site to be maintained

Preferred redevelopment option



Preferred redevelopment option among key cohorts:

- Those who are opposed to the redevelopment prefer to 'maintain the site' (59%), whereas supporters had stronger preference for the full redevelopment (67%)
- Men were more in favour of a 'full redevelopment' (60%) than women (52%)
- Those under 35 had higher preference of the 'limited redevelopment' option more than other age groups (22%)
- Those unaware of the project had significantly higher preference for site maintenance (22%), and were also more likely to be uncertain (15% don't know).

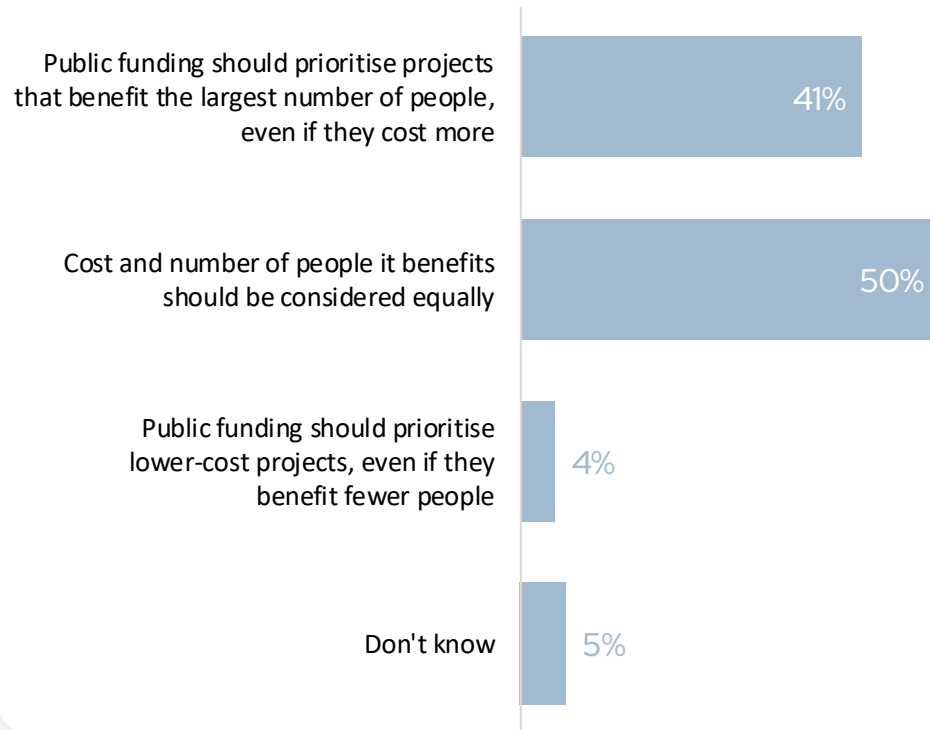
Q13d. Which of the following approaches would you most prefer for Fremantle Oval?
Base: Total sample (n=1,007)

✕ | ✕ Significantly higher/lower than other groups combined

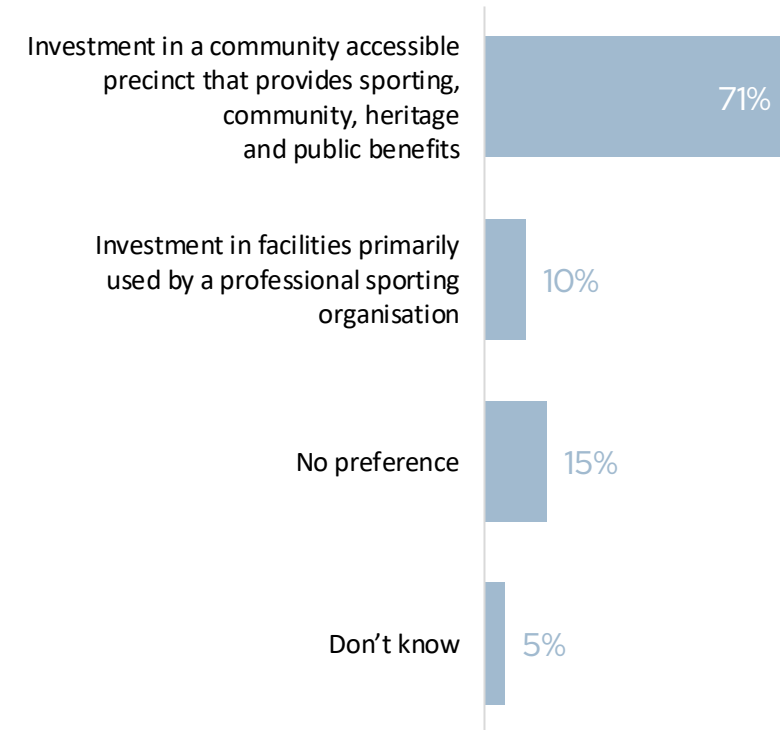
Confidential - Not for Public Consumption or Distribution

Community benefit was considered alongside cost, and ultimately drove investment preferences

Perception of cost vs. benefit of public investment



Preference for government investment

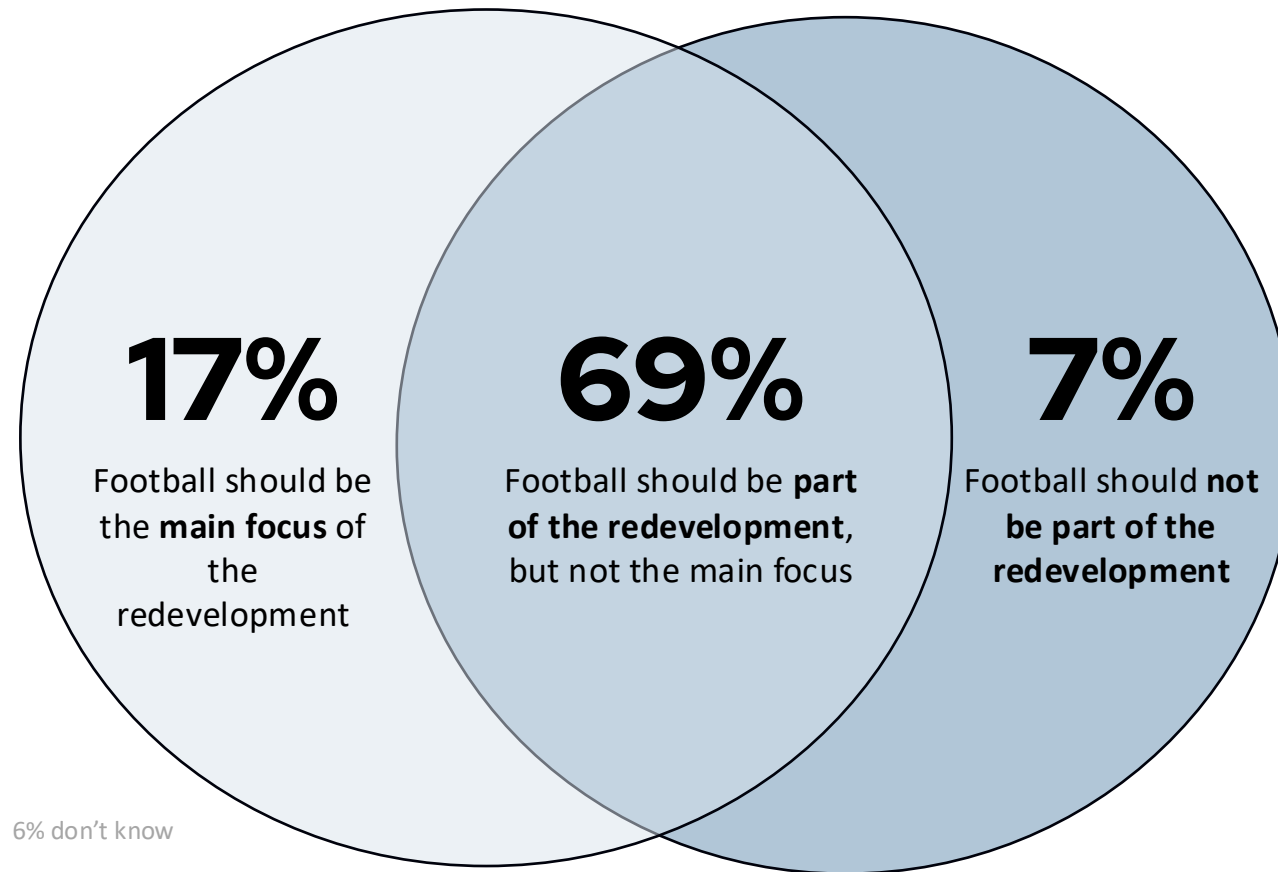


Q14. Which of the following best describes your view? Q21b. If government funding was available, which of the following would you prefer?
Base: Total sample (n=1,007)

Football provides identity, authenticity and visitation, but the redevelopment earns support because of its broader community value.

Football was seen as an important contributor to the redevelopment, but not its defining purpose

Role of football in the redevelopment

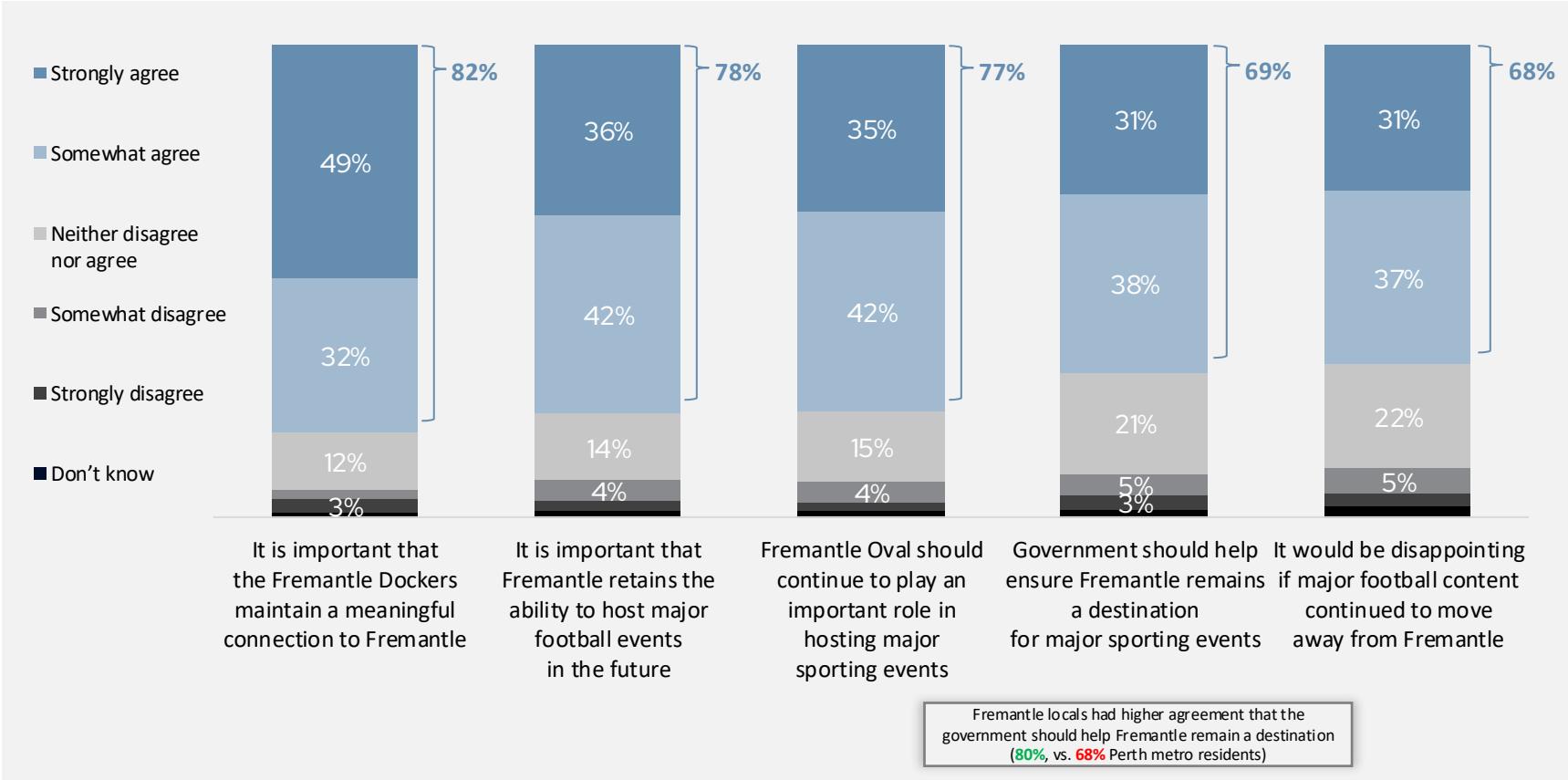
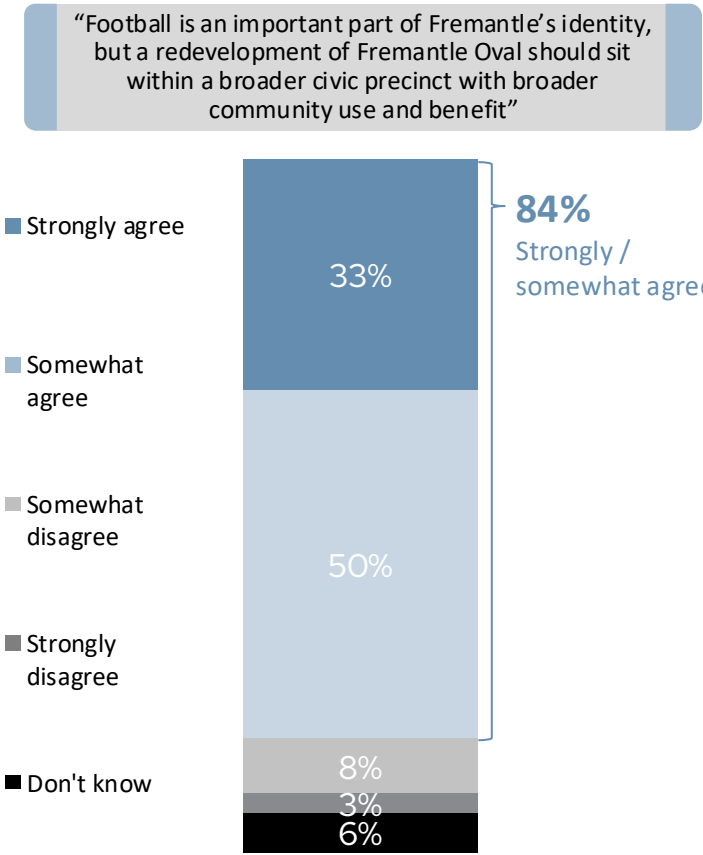


- Fremantle locals had higher belief that football should be the main focus of the redevelopment (**26%**, vs. **16%** Perth metro residents), though the majority still believed it should be a main focus (**58%**) – albeit significantly less than Perth metro residents (**71%**)
- Supporters had significantly stronger preference for football being part of the redevelopment but not the main focus (**75%**), whereas Opponents were more split: **29%** wanted football to be the main focus, **29%** part of the redevelopment but not the main focus, and **32%** not part of the redevelopment

This suggests that reasons for opposition vary, ranging from some wanting it to largely only service football while others want it to not have a football focus.

Football was valued for its contribution to Fremantle's identity, not as the redevelopment's primary purpose

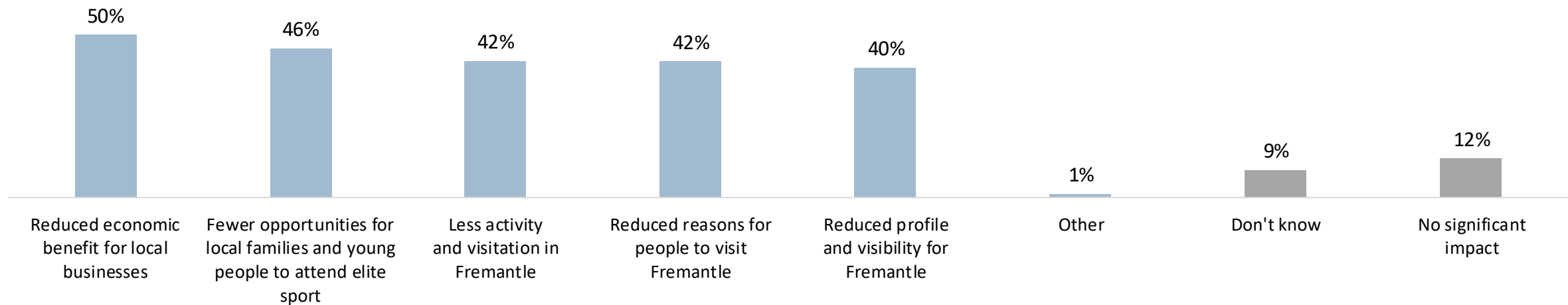
Attitudes around football and the redevelopment



Q16. To what extent to you agree or disagree with the following statement? Q16a. Thinking about Fremantle specifically, to what extent do you agree or disagree with each of the following statements? Labels <3% not shown. Base: Total sample (n=1,007)

Losing elite football was expected to reduce activity, visitation and economic benefit for Fremantle

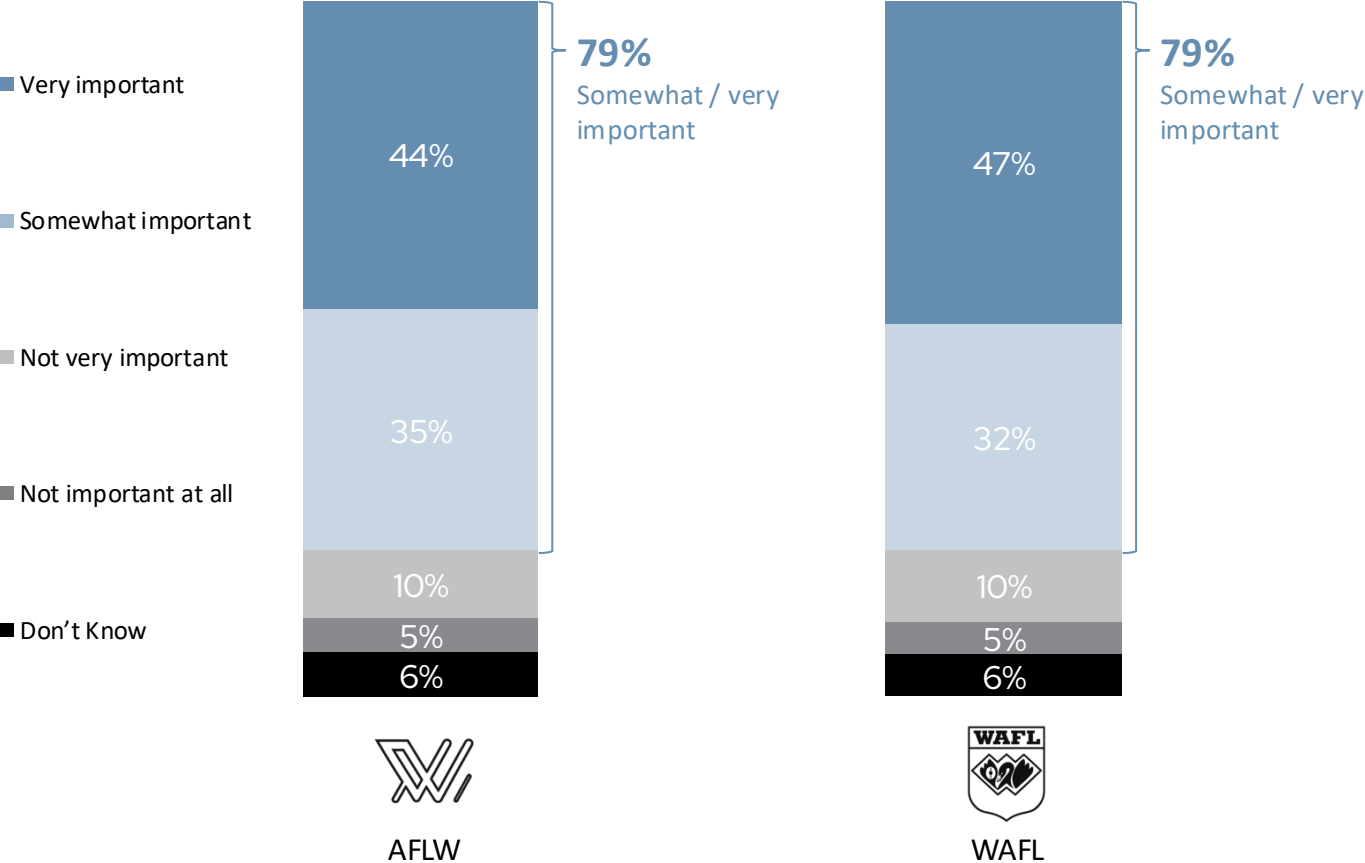
Perceived impact of removing elite football from Fremantle



Q16b. If elite football content such as AFLW matches were no longer regularly played in Fremantle, what impact, if any, do you think this would have?
Base: Total sample (n=1.007)

Maintaining Fremantle's ability to host major football events was considered important

Perceived importance of Fremantle having a venue to hold major football events



Perceived importance among key cohorts:

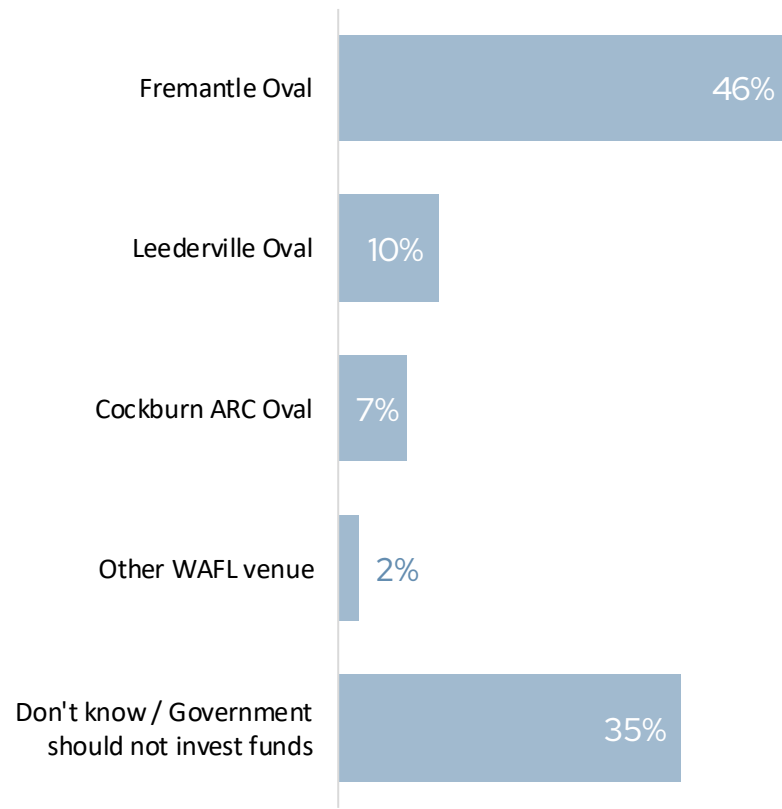
- Supporters placed significantly higher importance on both AFLW (86%) and WAFL (86%) matches being played there than Opposers (50%, and 54% respectively)
- Those who had not heard of the project had significantly lower perceptions of importance (76% for both)

Q17. Thinking about major football events such as WAFL finals and AFLW matches, how important is it that Fremantle has a venue capable of hosting?
Base: Total sample (n=1,007)

Green X | Red X Significantly higher/lower than other groups combined

Fremantle was the preferred location for future major football investment, ahead of Leederville and Cockburn

Preferred major football venue for investment



Preferred venue among key cohorts:

- Supporters had stronger preference for investment in Fremantle Oval (54%), than Opposers (24%)
- Fremantle locals preferred Cockburn ARC (18%) significantly more than Perth metro residents (6%), who preferred Leederville Oval (11%, compared with 3% among Fremantle locals). However, both still had strongest preference for Fremantle Oval (52% Fremantle locals, 45% Perth metro residents)
- Women more commonly thought that the government shouldn't invest or weren't sure (41%) than men (29%)
- Those aware of the proposal had stronger preference for Fremantle Oval (65%, vs. 36% those who had not heard of it)

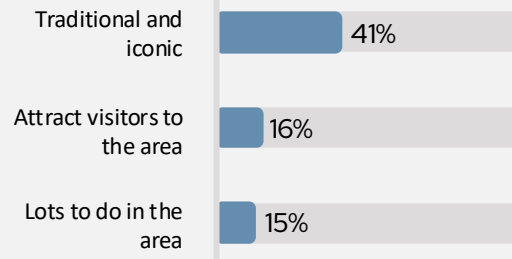
Q18. If the Western Australian government were to invest in a venue capable of hosting major football events such as WAFL finals and AFLW matches where required, which location should be prioritised?
Base: Total sample (n=1,007)

Fremantle won on identity and history, with improving accessibility the clearest opportunity

Reasons for preferred major football venue for investment



Preferred because of its unique identity, heritage and ability to contribute to the broader Fremantle community.

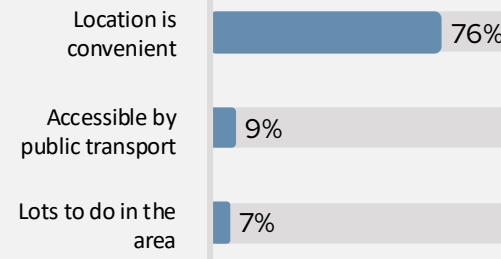


“

“Fremantle has a rich footballing heritage, and hosting the event here would provide a perfect blend of sporting competition and cultural history”



Preferred primarily for its central location and ease of access

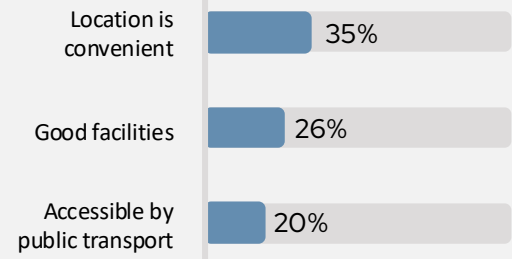


“

“It is a more central location when compared to the other two, meaning more people will be inclined to go”



Preferred for its modern facilities and accessibility rather than its identity or destination appeal.



“

“It’s a purpose built arena, with facilities and transport infrastructure set up to cope with such events”

Q18. If the Western Australian government were to invest in a venue capable of hosting major football events such as WAFL finals and AFLW matches where required, which location should be prioritised? Q19. You said [Q18 response] should be prioritised. Can you please tell us, in as much detail as you can, why that is? Base: Total sample (n=1,007)

Support for the Dockers as a partner was strong, provided the redevelopment remains community focused

Support for Fremantle Dockers being a partner in the Heritage Precinct

68%

support Fremantle Dockers being a potential partner of the Heritage Precinct.

5% oppose.

27% were impartial.

Q20. The Fremantle Dockers could potentially be a partner in the Fremantle Oval Heritage Precinct, but would not be the primary tenant or owner. To what extent do you support the Fremantle Dockers being a potential partner?

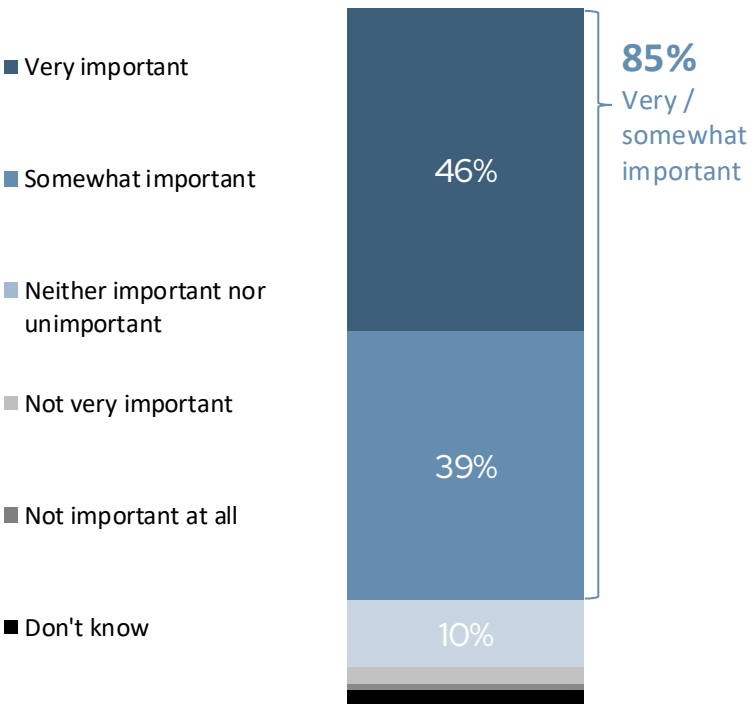
Base: Total sample (n=1,007)



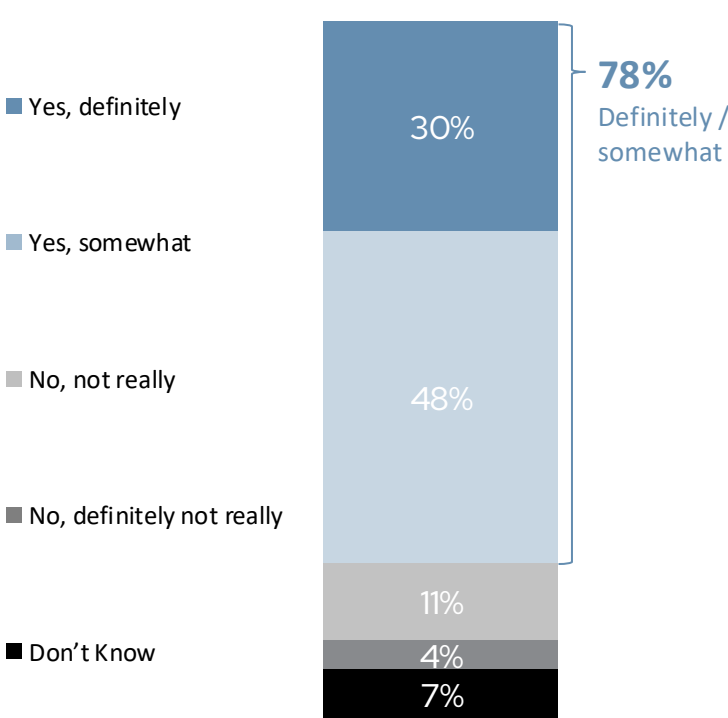
The Heritage Precinct was viewed as a meaningful investment in Fremantle, while a football-only redevelopment was less aligned with community expectations of public funding.

The Heritage Precinct was perceived as a meaningful investment as it aligns with community priorities

Perceived importance of government investment



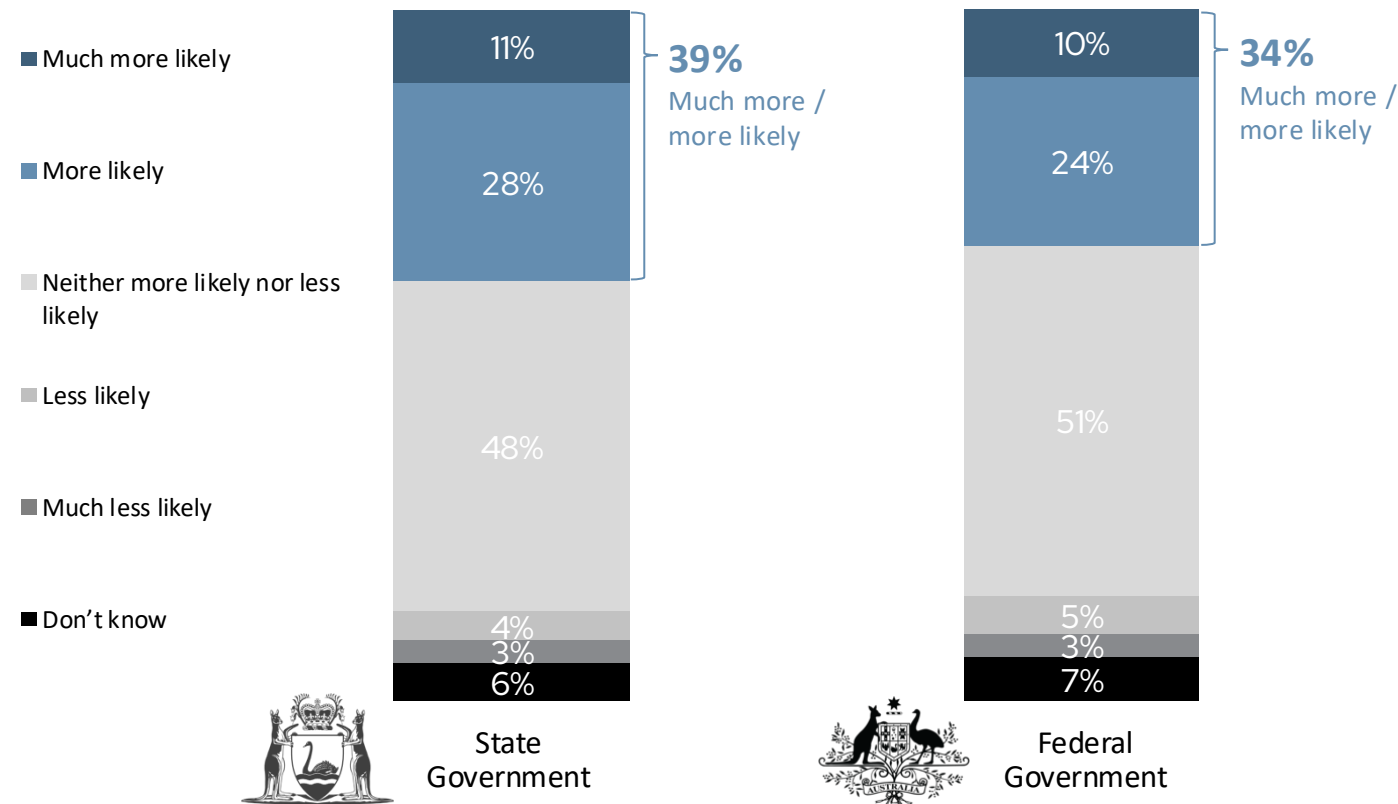
Perceived meaningfulness of government investment



Q22. How important is it to you that state and federal governments invest in projects that deliver wider community benefits? Q23a. If state and federal governments funded the Fremantle Oval Heritage Precinct, would you consider this to be a meaningful investment in Fremantle? Labels <3% not shown. Base: Total sample (n=1,007)

There was greater political upside than political risk associated with funding the Heritage Precinct

Impact on likelihood of voting for government



Impact on voting among key cohorts:

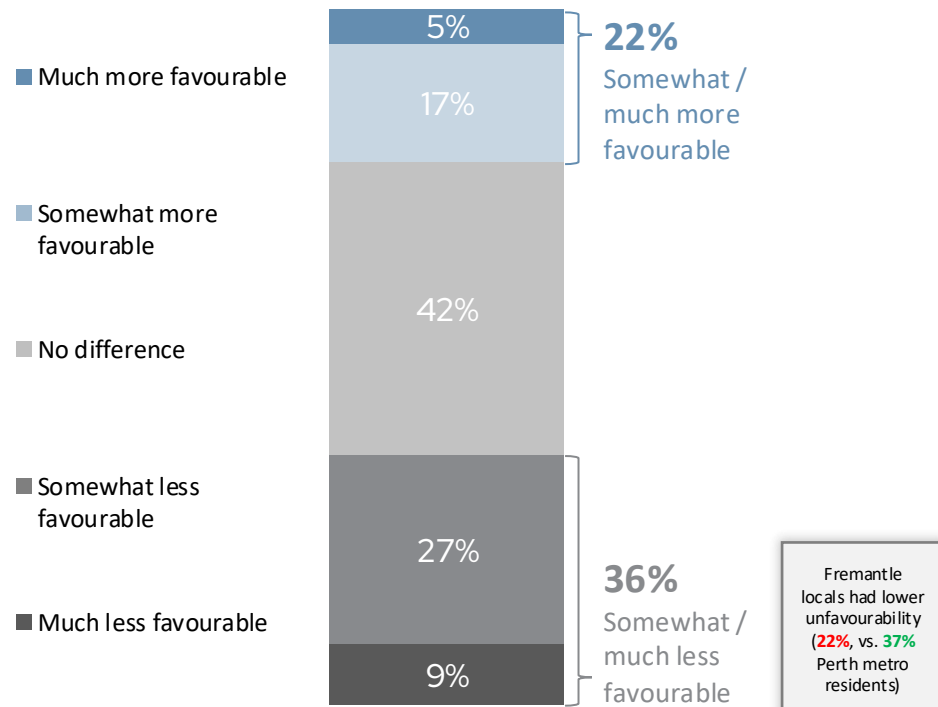
- Men were more likely to vote for both State (46%) and Federal (42%) government if they fund the project, compared to women (33% and 27%)
- Supporters were more likely to vote for state (48%) and federal (42%), than Opposers (10% state, 7% federal)
- Those aware of the proposal were more likely to vote for state (62%) and federal (54%), than those who had not heard of it (29% state, 25% federal)

Q23. Would you be more or less likely to vote for the state and federal government, if they made a clear decision to fund a community project like the Fremantle Oval Heritage Precinct?
Base: Total sample (n=1,007)

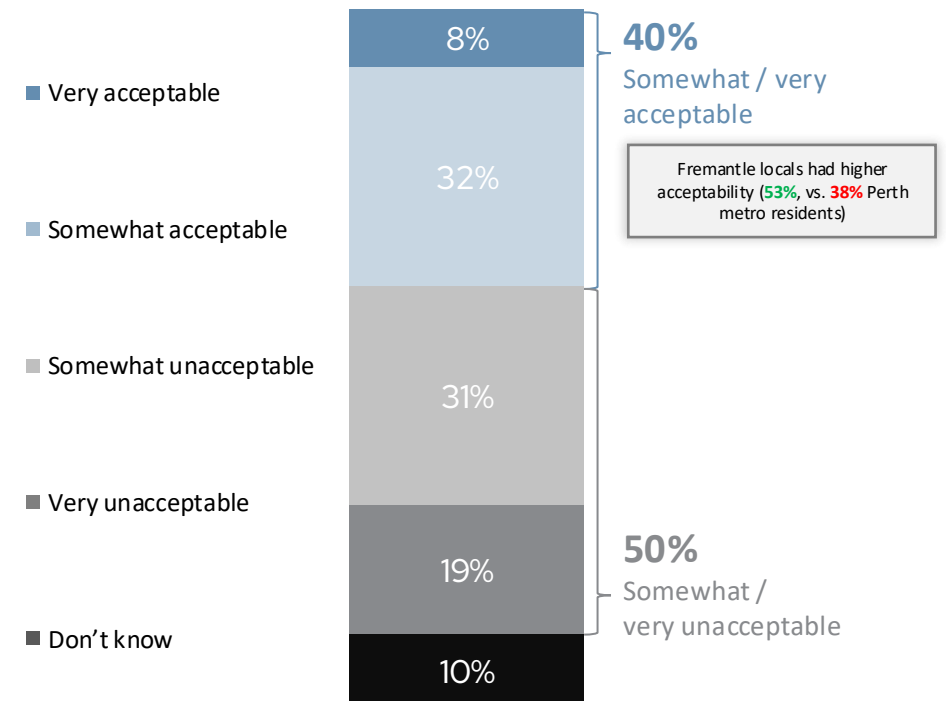
Green X | Red X Significantly higher/lower than other groups combined

Investment for a single sporting club was less acceptable and more likely to reduce government favourability

Favourability of government if funding the limited redevelopment



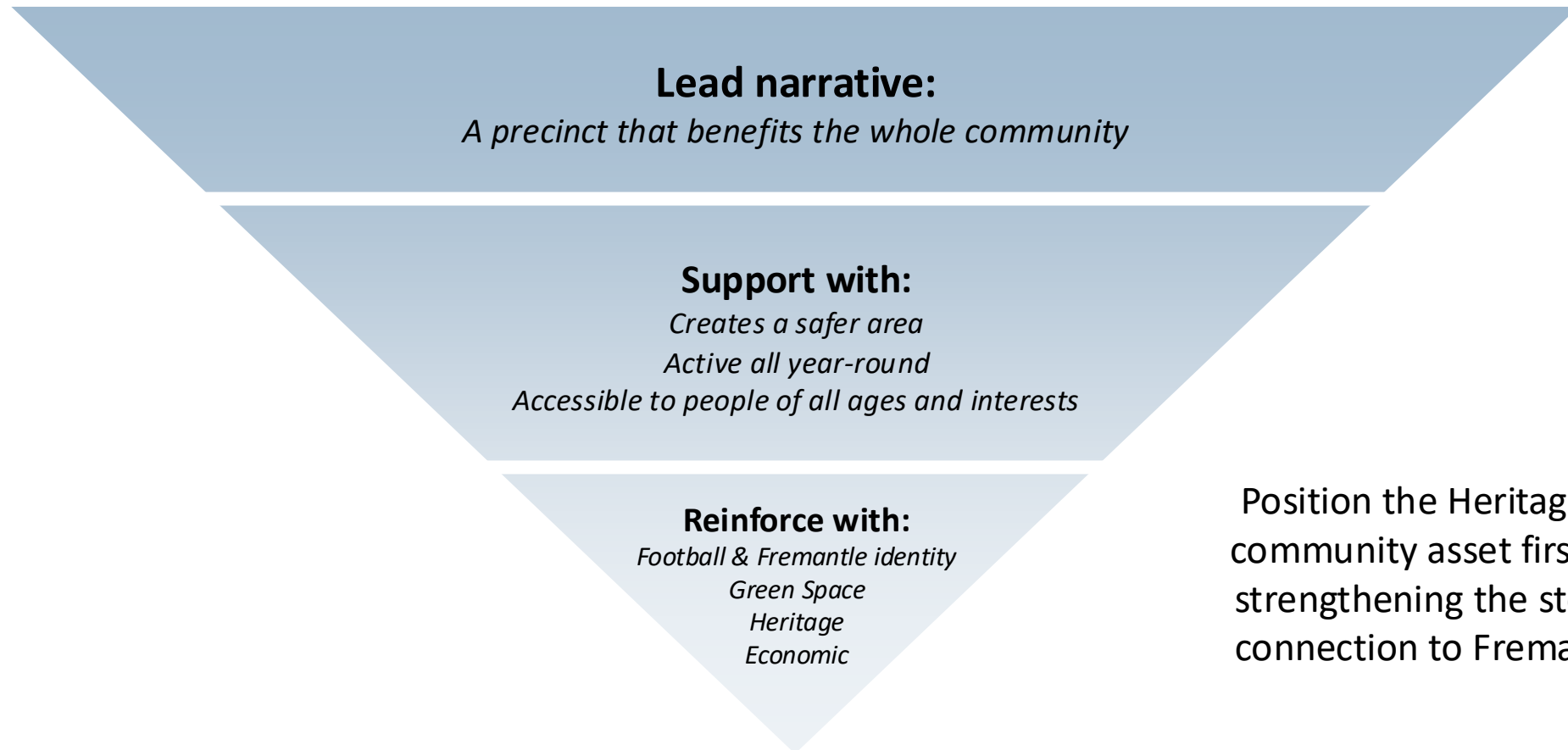
Acceptability of funding a single sporting club



Q24. If a government chose to only fund the limited football oval redevelopment that primarily benefits the South Fremantle Football Club, rather than the redevelopment of the area into the Fremantle Oval Heritage precinct with broader community benefit, how would that impact your favourability of that government? Q25. How acceptable is it to you for public funding to be used to upgrade facilities primarily benefiting a single sporting club such as South Fremantle Football Club?

Base: Total sample (n=1,007)

The findings suggest leading with community benefit will maximise advocacy reach



Position the Heritage Precinct as a community asset first, with football strengthening the story through its connection to Fremantle's identity.

Quantum Market Research

280 Little Collins Street
Melbourne VIC 3000
Australia

+61 3 9917 3432
research@.com.au

Who we spoke to

N=1,007 people from Western Australia

