

City of Parramatta

Presentation: Night Time Economy Research – 2017

Presented by: Micromex Research
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Methodology Overview

Four research stages:

1. General resident survey – N=300 phone interviews

- Mostly opinions of LGA residents for NTE precincts they have not visited in the past 12 months

2. Visitor survey (recruited in-situ across the three precincts) – N=300 interviews

3. Workshops:

- Business workshop (12 attendees - Businesses included cafes, restaurants, financial institutions, recreation facilities and cultural/ wellbeing centres)
- Stakeholder workshop (12 attendees – AHA; Parramatta and District Historical Society; The Museum of Applied Arts and Sciences; City of Sydney LGA; Parramatta Liquor Accord; Transport for NSW; Committee for Sydney; Parramatta Park Trust; Western Sydney Business Connection; Western Sydney Local Health District)

4. Audit of night time economy businesses (and ‘dark spots’)



Key Project Findings



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Current Situation

No major issues or concerns around Parramatta's night time economy:

- **Safety:** Visitors/non-visitors both stressed the importance of safety when choosing where to go out in the evening:
 - Audits revealed that Parramatta CBD, Harris Park and Epping were generally safe.
 - Dark-spot audit in Parramatta CBD also suggests that areas that are not main NTE hubs but may be used as pedestrian thoroughfares are also relatively safe
 - Visitor Agreement scores for safety generally satisfactory for all three precincts
- **Revisit Intentions:** Vast majority of visitors to the three precincts indicated they were 'likely'/'very likely' to re-visit within 12 months – strong commitment to top code.
- **Local Growth Opportunities?**
 - 39% of LGA residents had not been to Parramatta CBD at night L12M
 - 55% had not been to Epping
 - 81% had not been to Harris Park.
 - Challenge:
 - Very few non-visitors expressed any interest in visiting when asked directly...
 - But were more forthcoming when asked indirectly via an open-ended question



Potential NTE Opportunities

- **Communicate with your potential market:**

- Noticeable perceptual differences in how visitors and non-visitors view the precincts, particularly in terms of perceptions of safety and range of restaurants/bars etc. If non-visitors knew more about what was available and how safe the areas were, they may be more inclined to visit.
- Amongst non-visitors, one of the primary open ended suggestions for Harris Park and Epping was better communication of what's available.

- **Communicate with Local Businesses:**

- Local business owners who attended the workshop were keen to increase dialogue with Council – these are the engaged ones...
- During recruitment, Harris Park and Epping businesses were far less engaged and were not interested in attending – reaching out to these businesses so they better understand how Council can help them (and how they can help themselves) may be worthwhile.



Potential NTE Opportunities

- **Differentiate the offerings?** The profiles and images of each precinct are already quite different:
 - **Parramatta CBD** arguably has the strongest/most multi-faceted existing image of the three precincts:
 - Caters to locals (61% of Parramatta LGA residents had visited in the past 12 months) **and** those from elsewhere (only 39% of Visitors from the LGA – perhaps related to it being an employment hub)
 - Tends to cater for larger visitor groups with larger group spend, but less frequent visitation
 - Differentiation – Strengths*: Range of entertainment options, having a fun atmosphere and being able to have a big night out there.
 - Differentiation – Weaknesses*: Relatively low perceptions of safety, rowdiness, being family friendly – and parking had the lowest score
 - And o/e suggested improvements from visitors focussed overwhelmingly on parking – and more variety of restaurants/bars, and general safety
 - Non-visitor perceptual gaps**: Range of bars/restaurants/cafes/nightclubs, safe/family-friendly, fun, big night out

*Relative to the other precincts

**Non-visitors provided substantially lower scores relative to visitors



Potential NTE Opportunities

- **Differentiate the offerings (Continued)?**

- **Harris Park** is seemingly more of a local village, with a less well-defined image:
 - Used predominantly by Parramatta LGA locals for shopping (3/4 of visitors from LGA) – although only 19% of Parramatta LGA residents had visited L12M
 - Spend less on each visit than in Parramatta CBD (because of smaller group sizes), but they visit more often.
 - Differentiation – Strengths*: Shopping – and to a lesser extent, restaurants/cafes, wayfinding, family-friendly
 - Differentiation – Weaknesses*: Range of bars/nightclubs and low cost entertainment, public transport/parking, street lighting
 - And o/e suggested improvements from visitors were similar to Parramatta CBD: overwhelming focus on parking – followed by variety of restaurants/bars, and general safety
 - Non-visitor perceptual gaps**: Some **larger** perceptual gaps than for Parramatta.

Main gaps: safe/family-friendly, easy to move around in, look and feel is appealing, fun atmosphere, good range of cafes/restaurants

*Relative to the other precincts

**Non-visitors provided substantially lower scores relative to visitors



Potential NTE Opportunities

- **Differentiate the offerings (Continued)?**

- **Epping** – a clean canvas upon which to create?

- Draws heavily on Parramatta LGA residents for visitation (3/4 of visitors from LGA, plus some from Hornsby Shire) – although 45% of Parramatta LGA residents had visited in the last 12 months.
- Shopping is a primary activity, and visitor groups tend to be smaller who spend less per visit – but visit more often – reflecting the commuter population?
- Differentiation – Strengths*: Perceptions of safety/minimal rowdiness/family-friendly are very strong in Epping, as is accessibility (particularly public transport, and to a lesser extent parking) – all ‘Important’ attributes.
- Differentiation – Weaknesses*: Range of eating/drinking/entertainment options sig lower than the other two precincts – and lowest agreement scores amongst visitors in terms of having a fun atmosphere and being ‘the place to be’:
 - O/e suggested improvements from visitors: traffic congestion (more so than parking), greater range of restaurants/bars and shops open late
- Non-visitor perceptual gaps**: Safe/family friendly, accessibility/public transport, way-finding, well-prices food/drinks:
 - But: Non-visitors more likely to say there are interesting/low-cost and historical options, with shopping and a music scene

*Relative to the other precincts

**Non-visitors provided substantially lower scores relative to visitors



Potential NTE Opportunities

- **Parking:** The issue of parking is top of mind for both patrons and business owners (based on the Eat Street business owners in the business workshop):
 - Both visitors and non-visitors see parking as Important
 - Amongst visitors, 'adequate parking' was rated the lowest of 24 attributes for Parramatta CBD and Harris Park – and whilst the score was significantly better in Epping, it was still low.
 - And parking was one of the main issues raised by both non-visitors and visitors in all three precincts on the open-ended 'suggested changes' question.
 - Eat Street businesses want more multi-story car parks built. However, they also acknowledge that better communication to patrons of existing car parks and/or shuttle buses to car parks may help.
 - The audits, including the dark-spot audit in Parramatta CBD, suggest that the dark spot thoroughfares that link NTE hubs to car parks etc are already relatively pedestrian friendly, which would facilitate the external stakeholder's notion of more visually aesthetic night time pedestrian networks.



Key NTE Themes

- **Safe and Vibrant:**
 - Safety (and family friendly as a proxy) are key 'Importance' attributes for both visitors and non-visitors – one of the main perceptual 'Agreement' roadblocks for non-visitors to all three precincts – particular strength for Epping
 - Vibrancy: Using 'fun atmosphere' as a proxy, mid-range 'Importance' for both visitors and non-visitors – a main perceptual 'Agreement' roadblock for non-visitors to Parramatta and Harris Park – relative weakness for Epping
- **Competitive NTE:** Visitation **by LGA residents** to any of the three LGA precincts 77%; Sydney City 67%; Darling Harbour/King Street Wharf 60%; The Hills District 45%.
- **Live music and entertainment:** Seen as a lower 'Importance' attribute for both visitors and non-visitors – and amongst visitors to each of the three precincts was one of the lowest scoring Agreement attributes.
- **Diverse and inviting for everyone:** Mid-range Importance in terms of 'diverse' for both visitors and non-visitors, based on 'a place where there is a range of things to see and do' – a mid-range perceptual roadblock for non-visitors to Harris Park – relative strength for Parramatta, weakness for Epping. See also 'safety/family friendly' discussion above.



Key NTE Themes

- **Spaces for creativity and innovation:** Seen as a lower 'Importance' attribute for both visitors and non-visitors, based on 'a place where there are unique and interesting options for entertainment'. However, this is a more esoteric attribute that perhaps requires more explanation. External stakeholders supported the creation of night time pedestrian networks, that are safe and integrate art into urban design
- **Events and activations:** See above discussion based on 'a place where there are unique and interesting options for entertainment'. Both Businesses and External Stakeholders identified more events as a signature project – better long term planning, leverage local businesses
- **Easily accessible:** “Getting to and from the area is easy” is a key 'Importance' attribute for both visitors and non-visitors – one of the main perceptual 'Agreement' roadblocks for non-visitors to Epping – a key o/e suggestion from visitors to Epping



Questions?



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