



Newtown Precinct Visitor Economy Research



Methodology

METHODOLOGY

Methodology Approach

An on-line survey was recommended as the most appropriate form of collecting the data for the following reasons:

- Cost effective way of reaching the target;
- Over 80% of the population has access to the Internet;
- Faster fieldwork time;
- No interviewer bias;
- Internet research produces richer open ended responses;
- Ability to show stimuli



Specifications

Target Sample

- The target sample was all Residents of Sydney aged 18 years and over
- Sydney Residents were classified into Primary, Secondary and Tertiary catchments by proximity to Newtown by post code

Sample

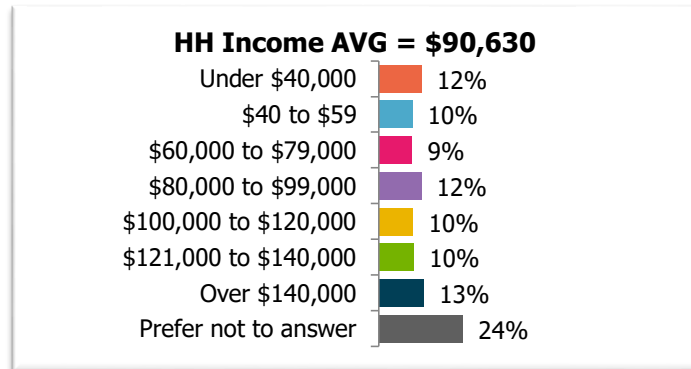
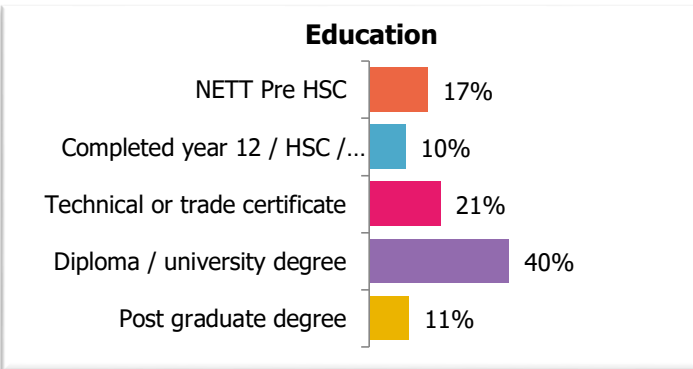
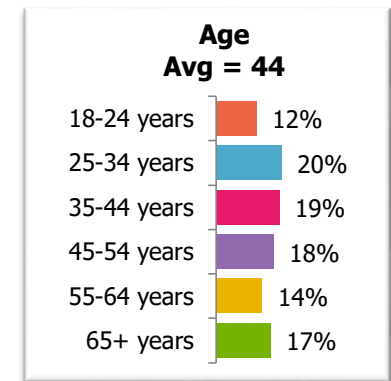
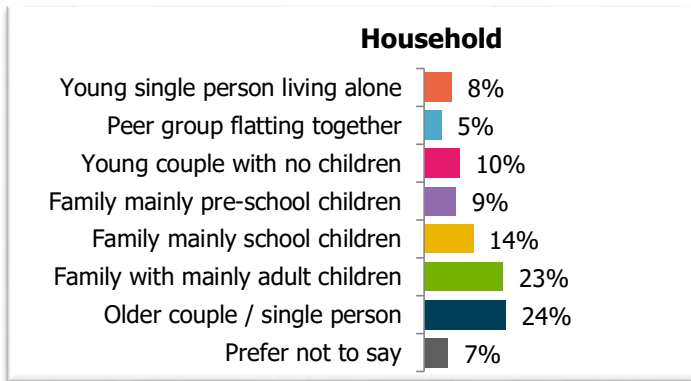
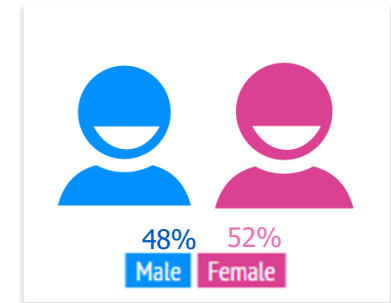
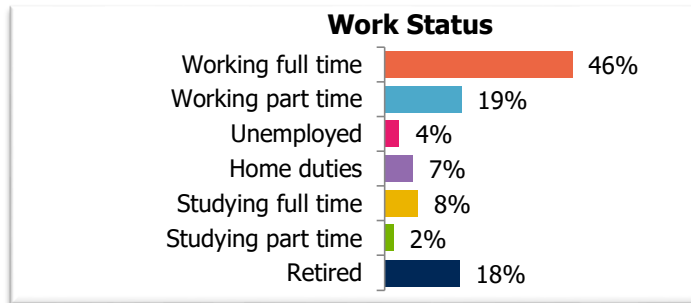
- The sample consisted of 394 respondents recruited from the My Opinions Panel
- To ensure a robust enough sample in the Primary and Secondary catchments, these areas were over sampled

Quotas and Weighting

- Hard quotas were placed on respondents by gender, age and postcode
- Data was weighted to the 2011 ABS Census at a post code level

WHO WE SPOKE TO

- The weighted data produced an even mix of males & females, with an average age of 44 years living in the Sydney Metropolitan area.
- Nearly half the sample were in an older life stage with either adult children or empty nesters. Just under 1 in 4 have children in the home and 1 in 4 are in younger households.
- The average income is \$91K, with 72% possessing a tertiary qualification.



Base=3,384,255
Sydneyiders

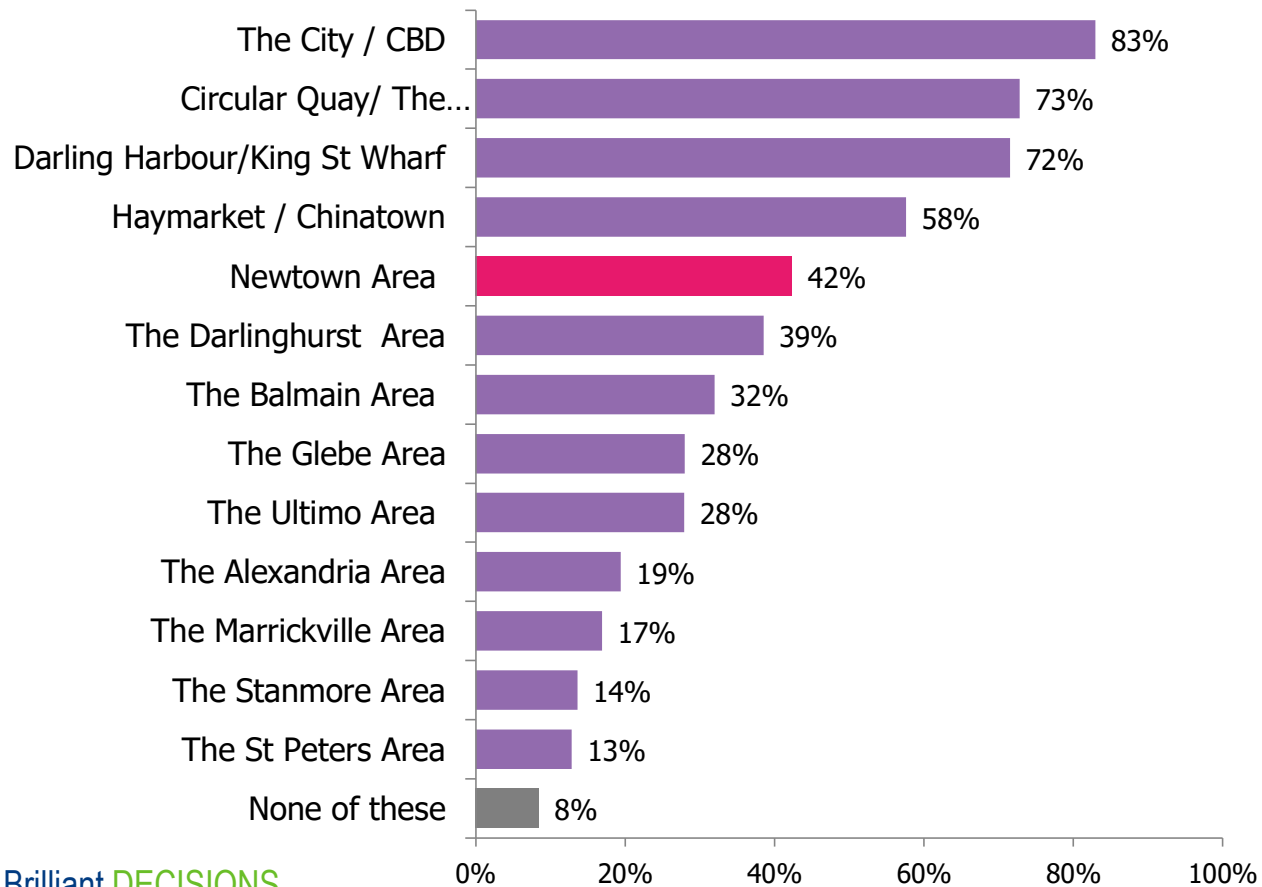


Main Findings

Visiting Sydney

Ever Visited

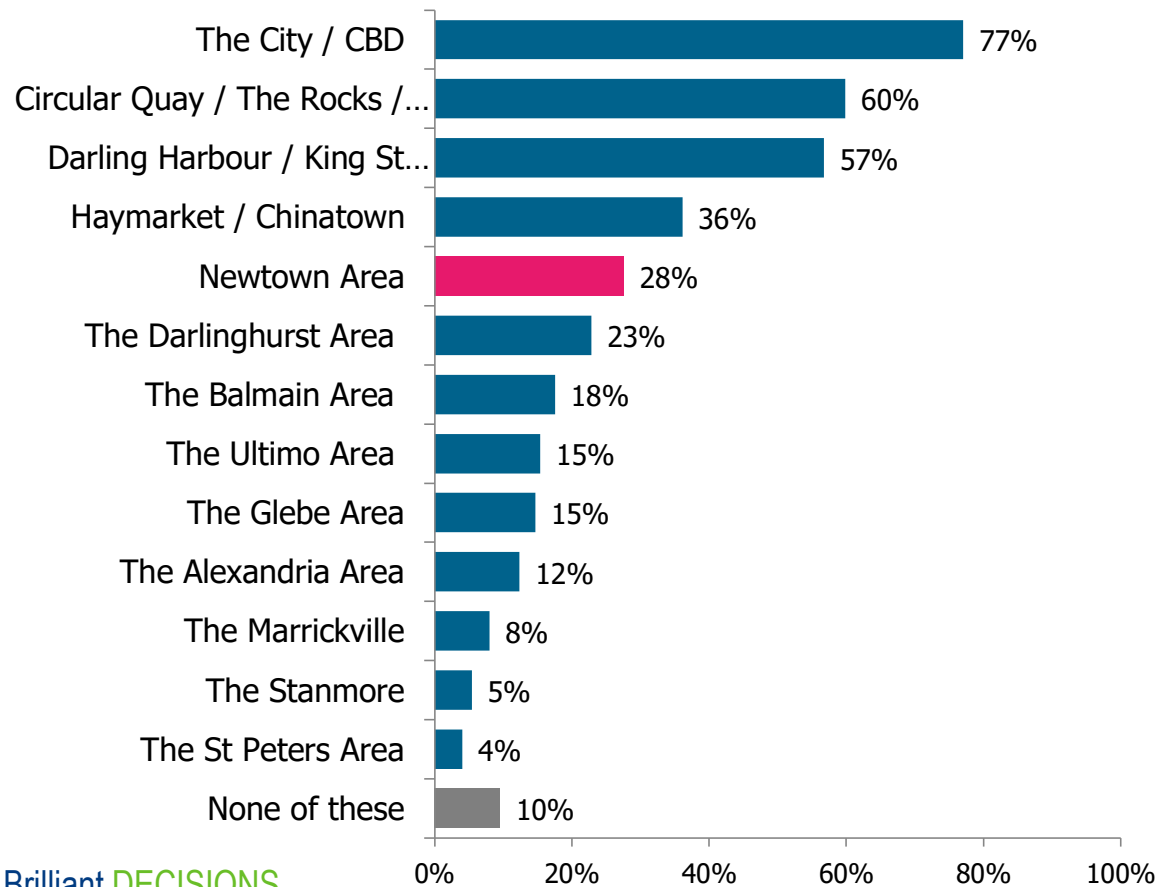
- In the past 12 months, 28% of Sydneysiders have visited Newtown, giving Newtown the highest visitation outside city precincts.
- Just over 3 in 4 Sydneysiders have visited the City / CBD and 2 in 5 have visited the Circular Quay area.
- The suburban precinct with the next highest visitation to Newtown is Darlinghurst at 23%.



Base=3,384,255 Sydneysiders

Past 12 Months

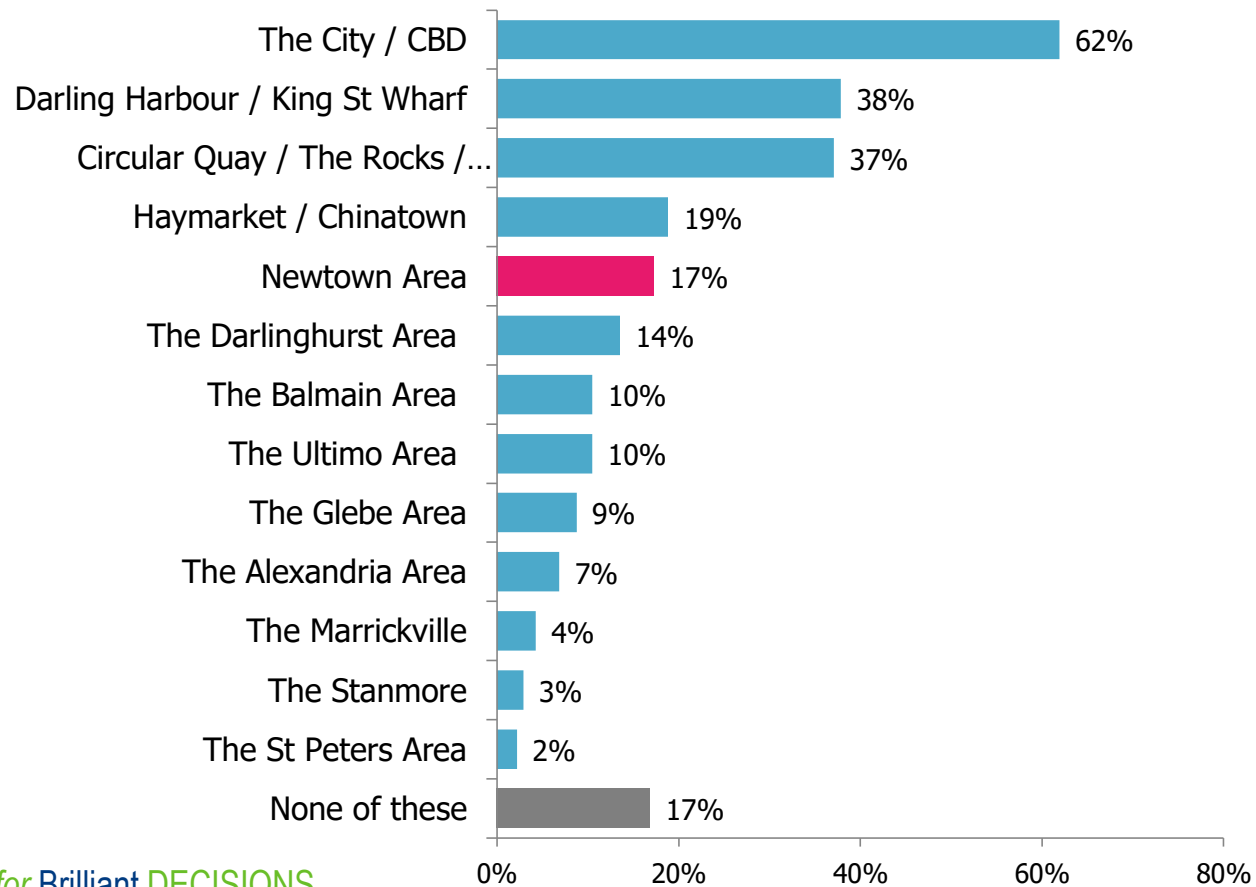
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Base=3,384,255 Sydneysiders

Past 3 Months

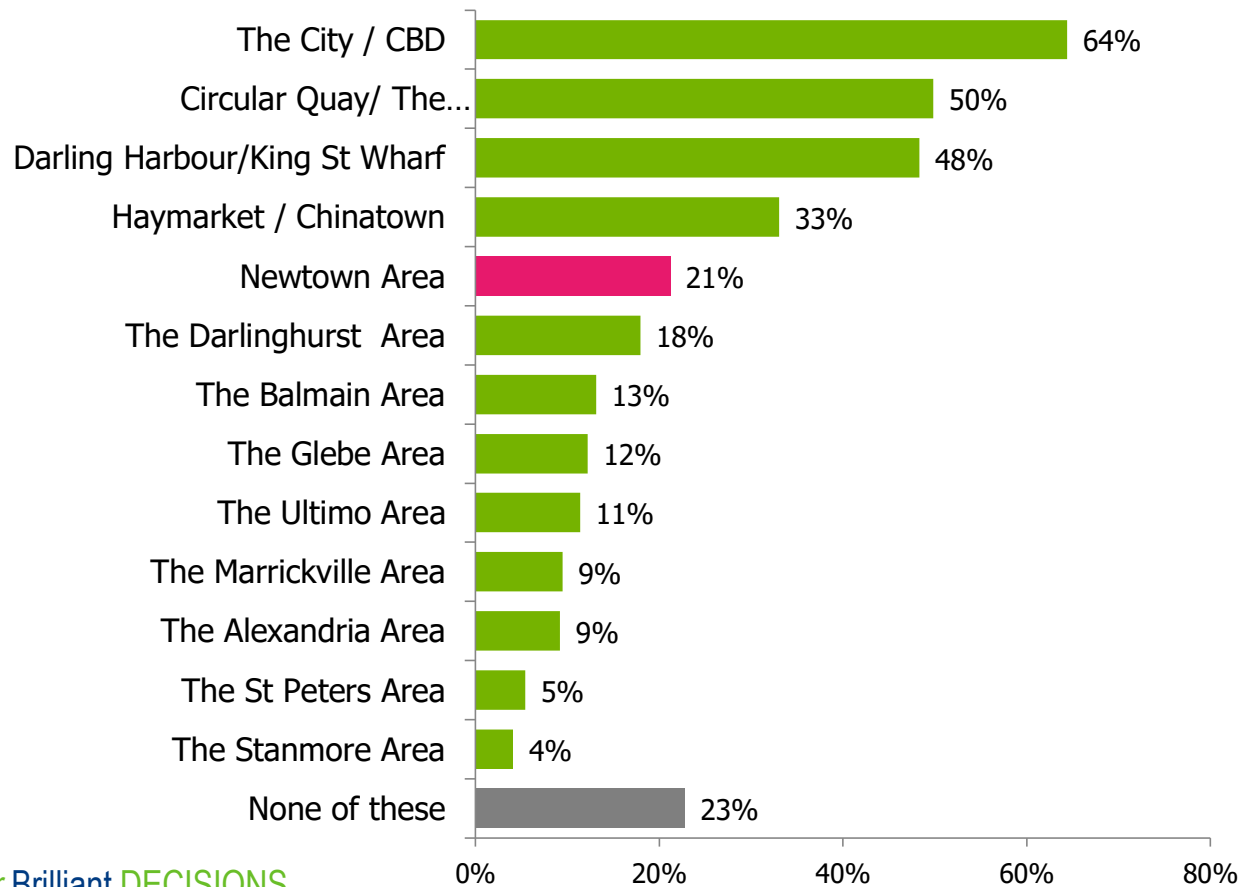
- In the past 3 months, 17% of Sydneysiders have visited Newtown.
- Just over 3 in 5 Sydneysiders have visited the City / CBD and around.
- The suburban precinct with the next highest visitation to Newtown is Darlinghurst at 14%.



Base=3,384,255 Sydneysiders

Next 6 Months

- Around 1 in 5 Sydneysiders intend on visiting Newtown for leisure in the next 6 months.
- Intended visitation to the CBD is just under 2 in 3 and for both the Circular Quay and Darling Harbour areas around 1 in 2.
- The suburban precinct with the next highest intended visitation to Newtown is Darlinghurst at 18%.



Base=3,384,255 Sydneysiders



Main Findings

Thoughts about Newtown

Impressions of Newtown

- Restaurants is a clear dominant thought for all Sydneysiders when it comes to thinking about Newtown.
- Other thoughts that come though loudly are cafes, food & shops.



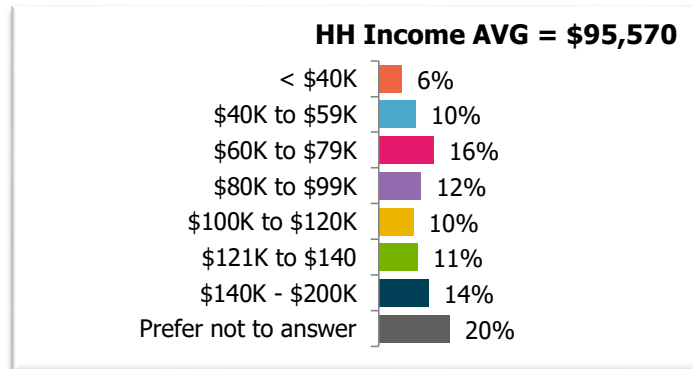
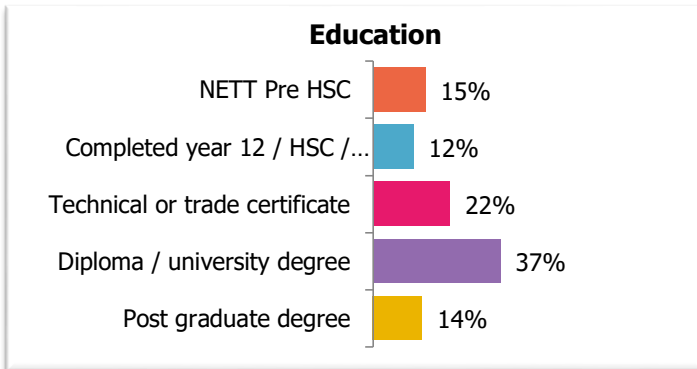
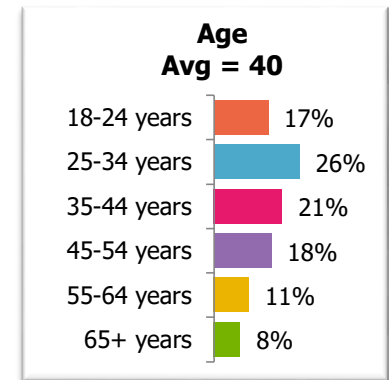
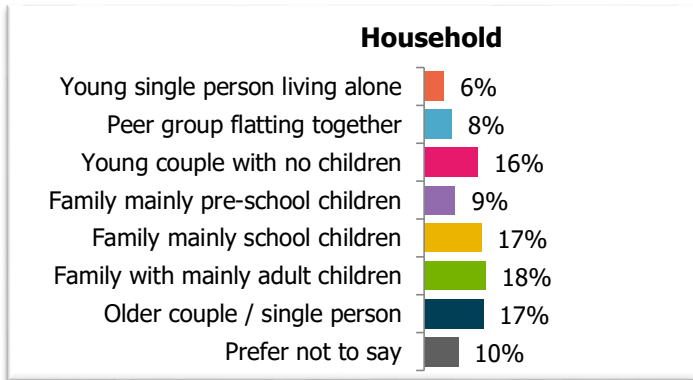
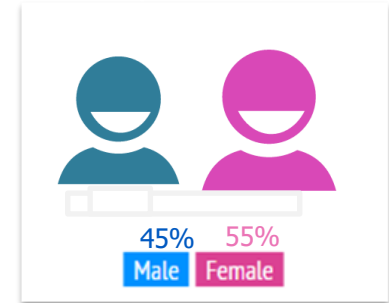
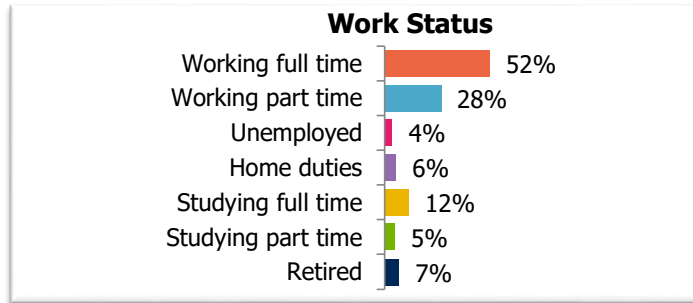


Main Findings

Past 12 Month Last Visit to Newtown for Leisure

The Newtown Visitor

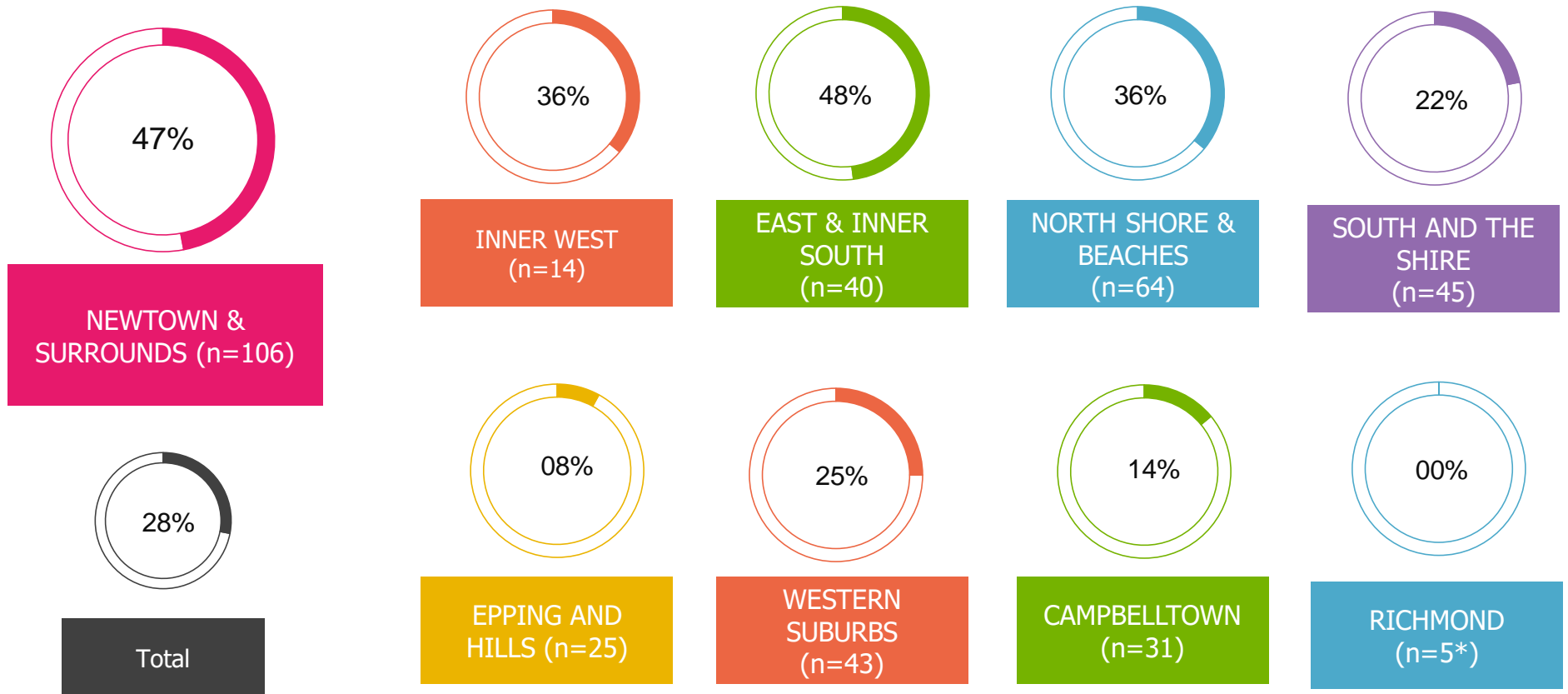
- The weighted sample of Past 12 month Visitors to Newtown has a population of 854,490 with a slight skew towards females.
- The average age is 40, slightly younger than the Sydney population of 44, with 30% SINKS & DINKS, 26% families and 35% older persons.
- Eight in ten are in the workforce, with the 73% possessing a tertiary qualification.



**Base=854,490
Past 12 Month
Visitors to
Newtown for
leisure**

P12M Visitation

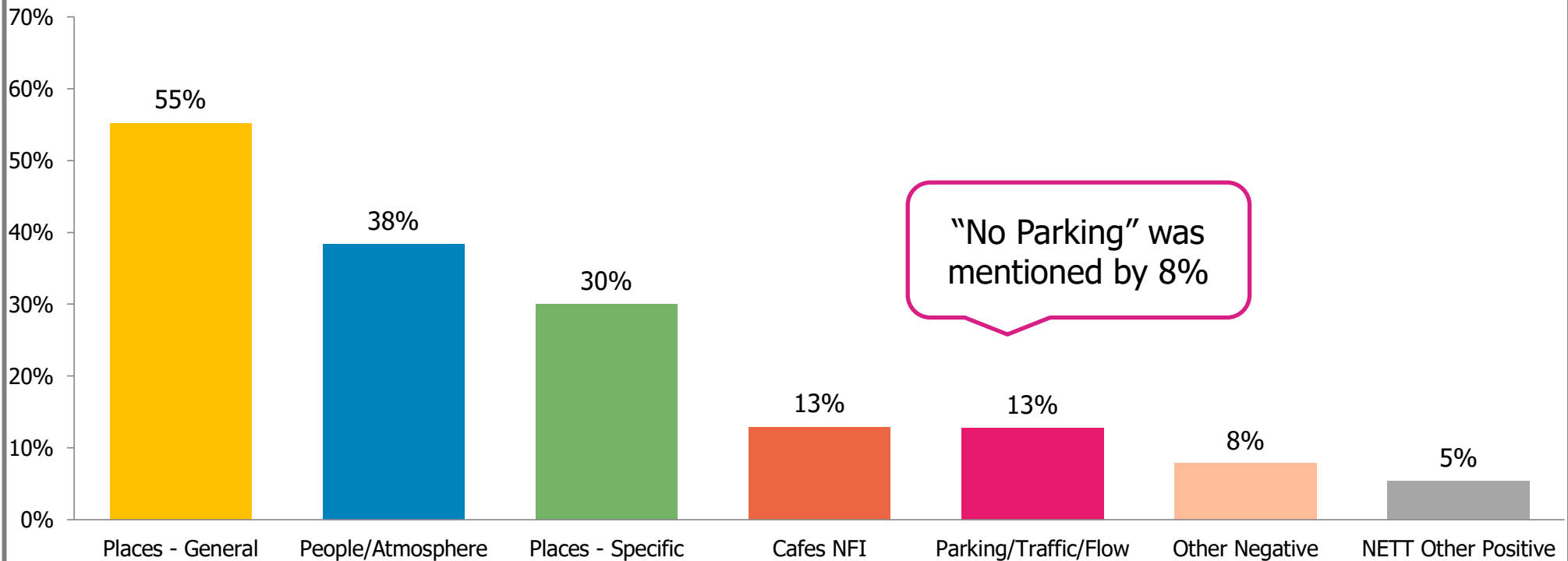
- In the past 12 months, the 47% residents from Newtown & Surrounds have visited Newtown for leisure.
- Residents from the East and Inner South have had the highest visitation to the precinct for leisure at 48%.



Base=854,490 Past 12 Month Visitors to Newtown for leisure

Impressions of Newtown

- General places such as cafes, restaurants, pubs and bars, shops and shopping were mentioned as coming to mind when thinking about Newtown for 55% of P12M visitors.
- The People / Atmosphere was mentioned by 38% and specific places, such as King Street, the Enmore Theatre & Dendy were mentioned by 30%



Base=854,490 Past 12 Month
Visitors to Newtown for leisure

NEWTOWN
PRECINCT

Thinking of Newtown – General places

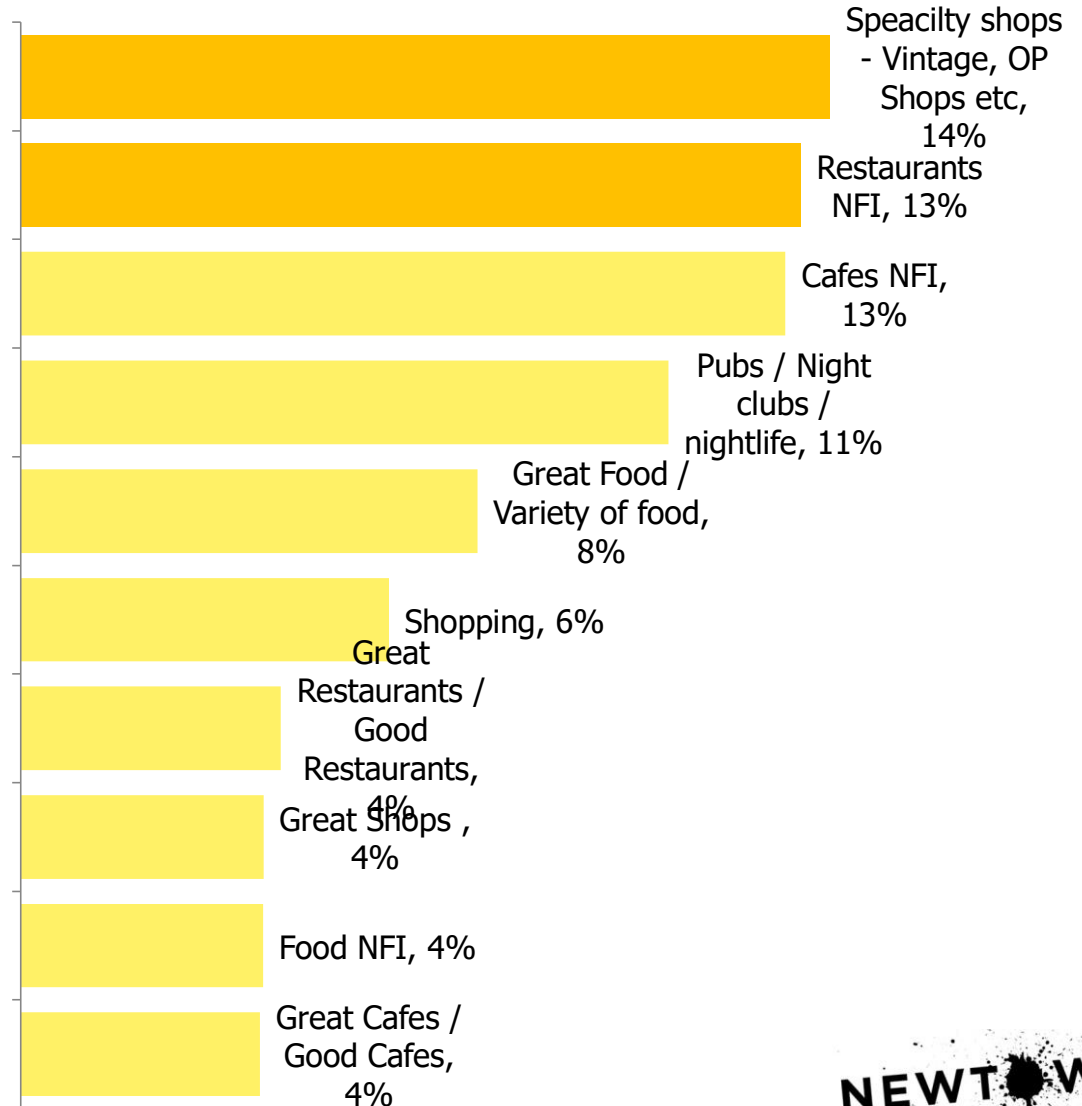
- When mentioning general places, Specialty Shops such as Vintage, Boutique, Antique, Opportunity and Book shops were the most frequently mentioned at 14%.
- Restaurants were the next most often mentioned at 13%.

55%



General Places

Base=854,490 Past 12 Month Visitors to Newtown for leisure



Thinking of Newtown – People / Atmosphere

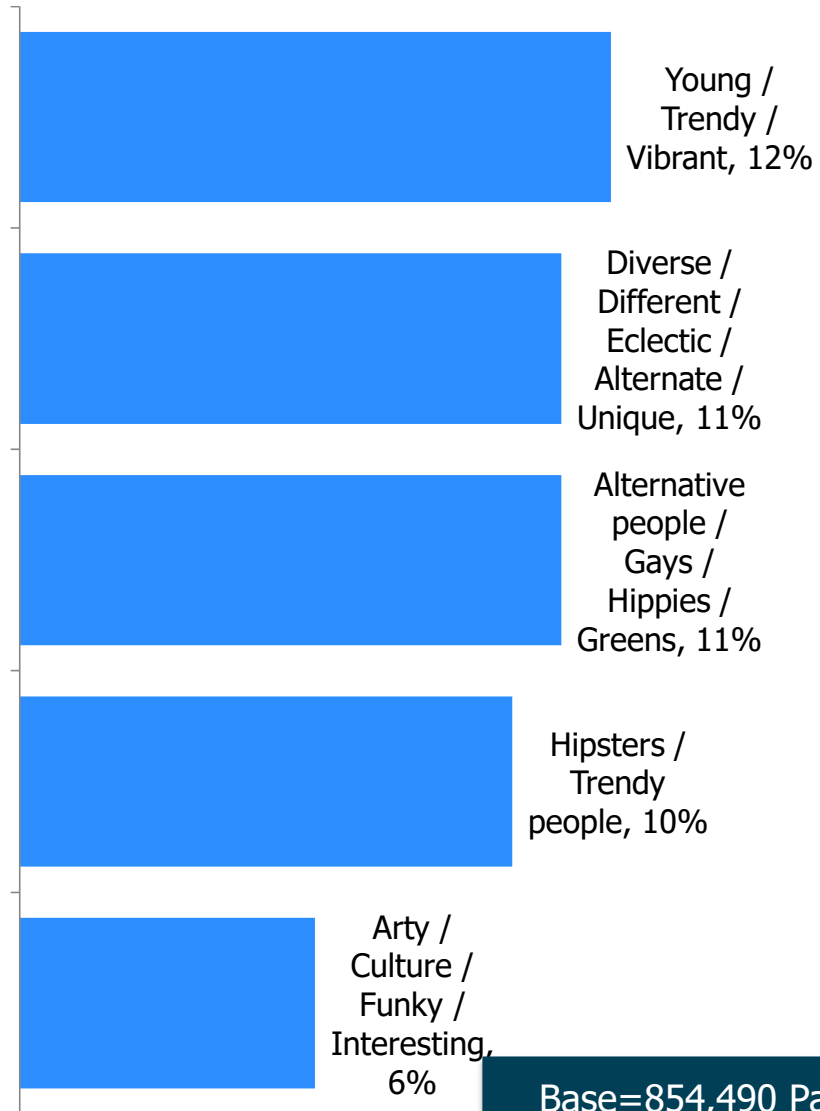
- When mentioning people / atmosphere, the most common mention was Young / Trendy / Vibrant people at 12%.
- Diverse / Different / Alternate & Eclectic as the atmosphere was mentioned by 11% and Alternate, Gays, Hippies and Greens as people there were also mentioned by 11%.

38%



People / Atmosphere

Base=854,490 Past 12 Month Visitors to Newtown for leisure



Base=854,490 Past 12 Month Visitors to Newtown for leisure

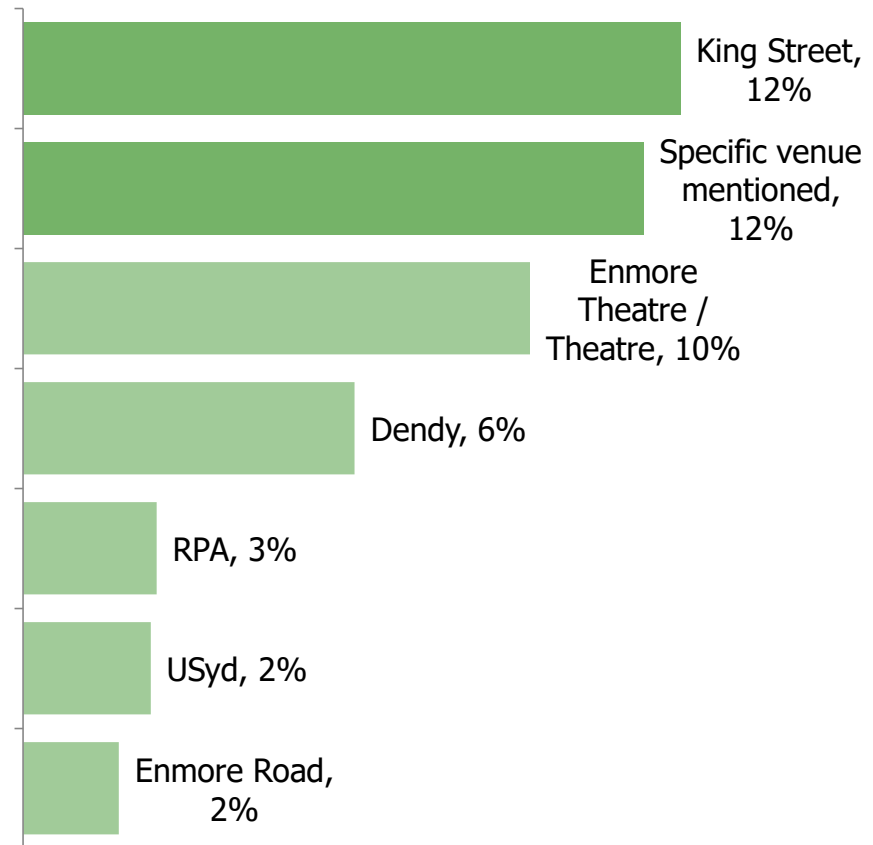
Thinking of Newtown – Specific Places Mentioned

- When mentioning specific places, King Street had the most mentioned at 12%, followed by Specific Venues (e.g. The Bank, The Townie, The Vanguard) which when netted came to 12%, but were various enough that no one specific venue came to <2%.
- The Enmore Theatre was mentioned by 10%.

30%

Specific Place Mentioned

Base=854,490 Past 12 Month Visitors to Newtown for leisure

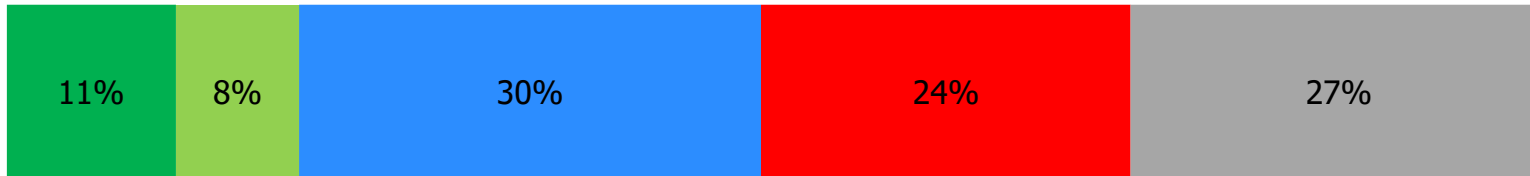


Frequency of Visitation

- For those who visited Newtown for leisure in the P12M, the averages frequency of visitation was 1.4 times per year.

For Leisure n=124

Average #
per Year



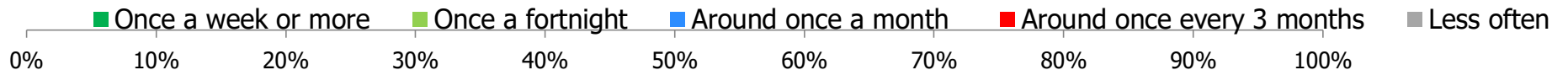
1.4

For Work n=32*

- For those who visited Newtown for work in the P12M, the averages frequency of visitation was 4 times per year.



4



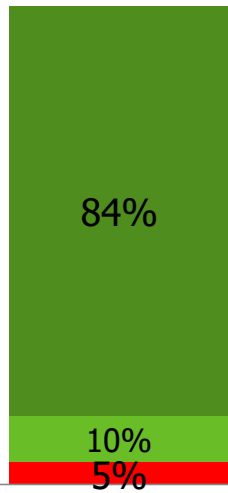
Base=854,490 Past 12 Month
Visitors to Newtown for leisure

**Caution – low base*



Last Visit

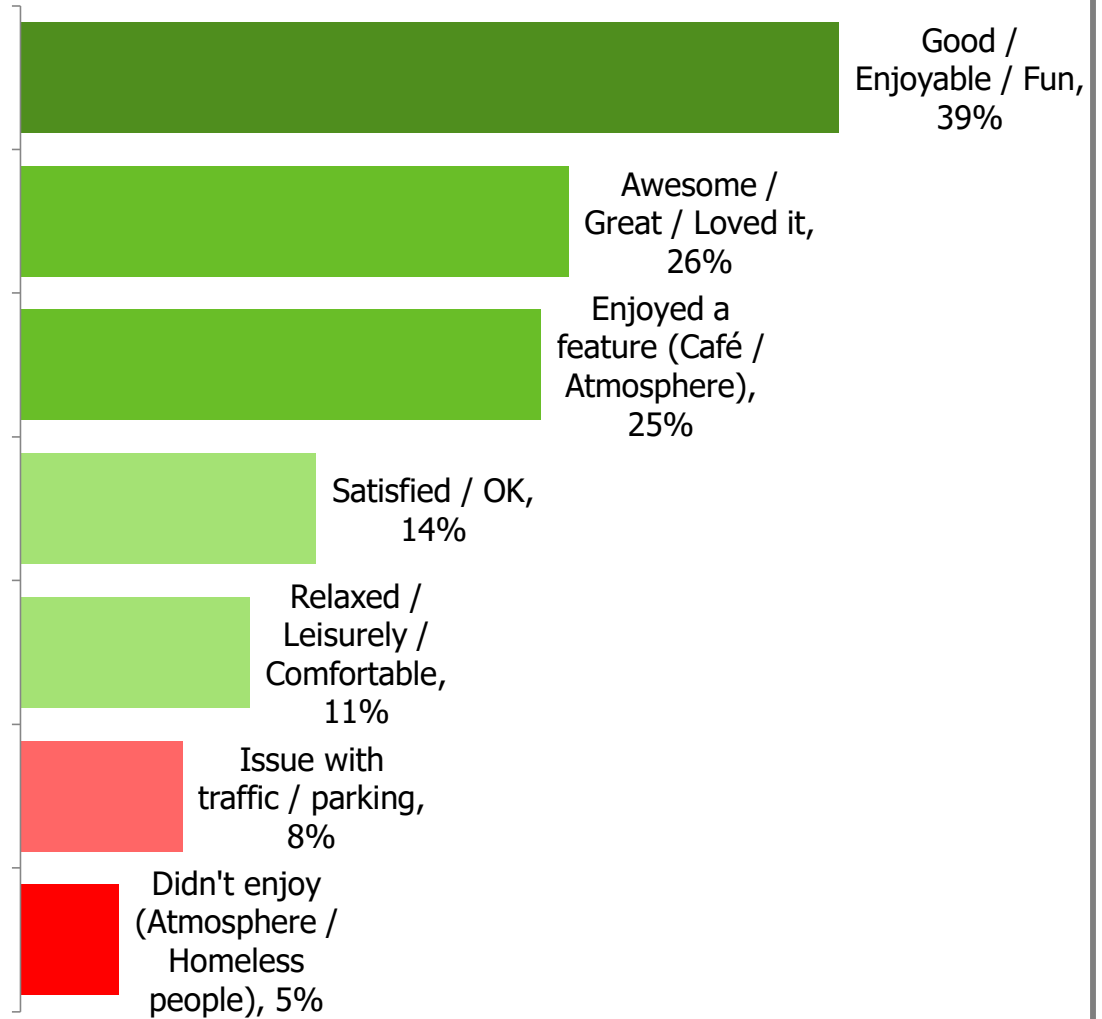
- For 84% of those who visited in the Past 12 Months, the visit was positive. Nearly 2 in 5 said the visit was Good / Enjoyable / Fun and 1 in 4 said it was Awesome / Great / Loved it, with 1 in 4 enjoying a feature such as a café or restaurant.
- Around 1 in 10 found the experience positive but... it was marred by something such as parking or the atmosphere



- Positive
- Positive but...
- Negative

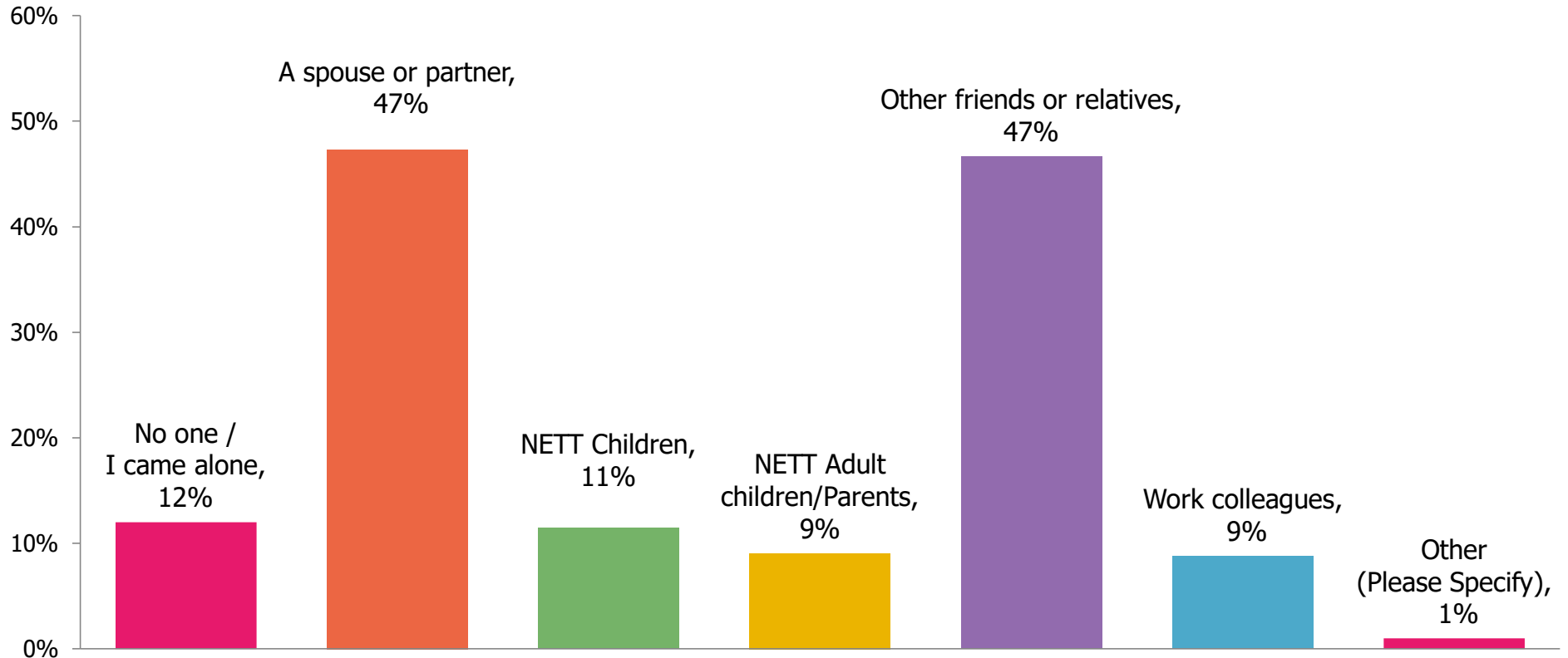
Last Visit

Base=854,490 Past 12 Month Visitors to Newtown for leisure



Who they came with

- Nearly half of all P12M Newtown Visitors came with a spouse or partner and/or another friend or relative.
- Around 1 in 10 came with children.

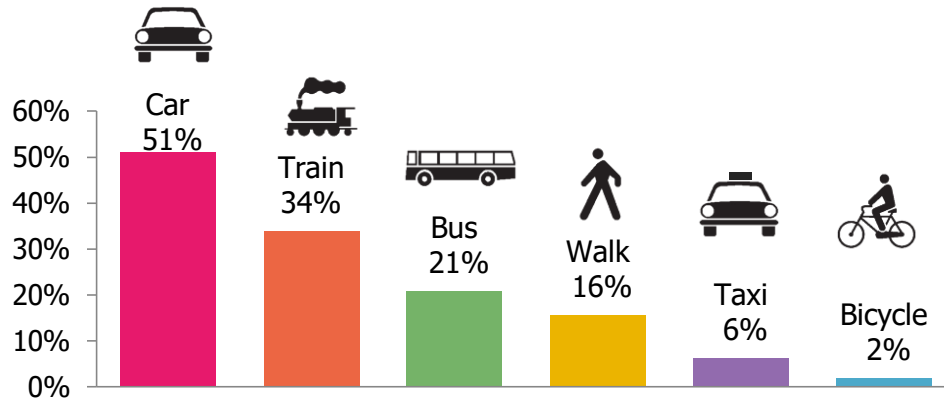


Base=854,490 Past 12 Month Visitors to Newtown for leisure

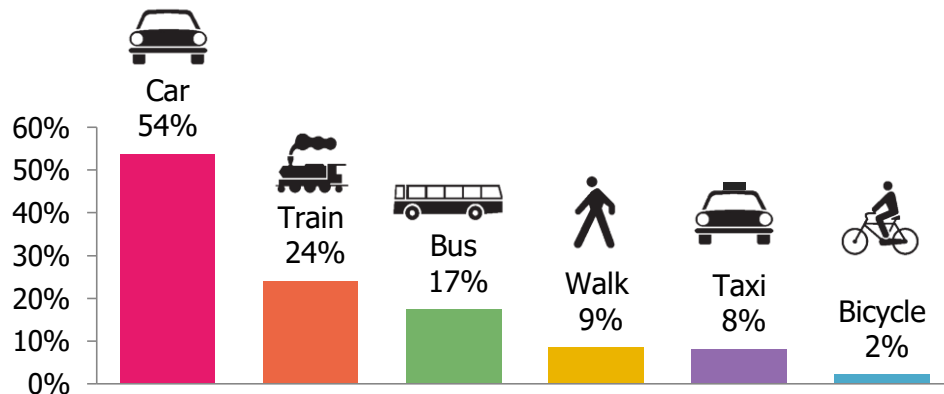
Mode of Transport

- The most common way to travel to and from Newtown is via private car at 56%.
- Train is the second most prevalent way at 34% & Bus at 23%.

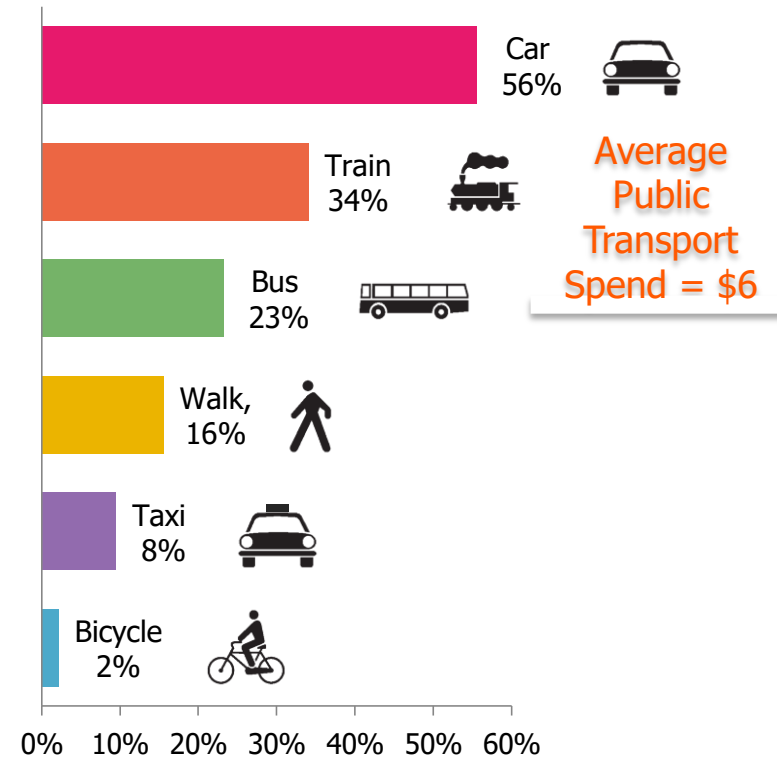
To Newtown



From Newtown



To & From Newtown

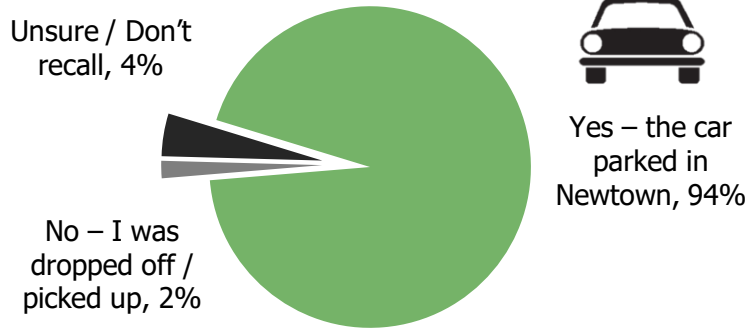


Base=854,490 Past 12 Month Visitors to Newtown for leisure

Parking

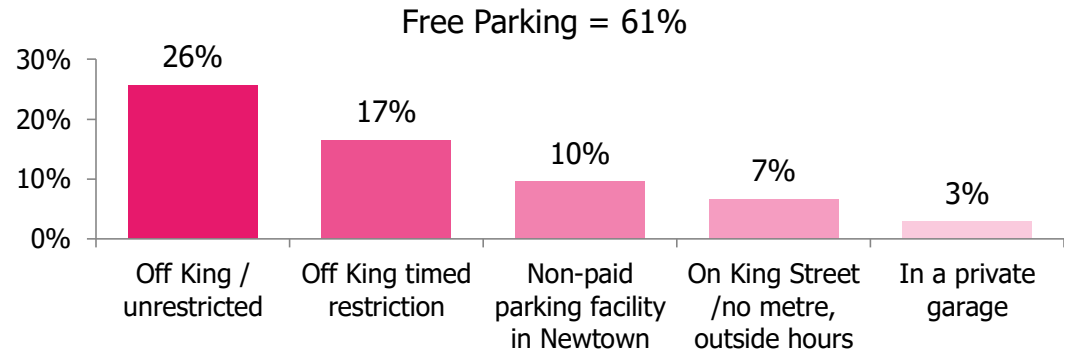
- Among those who drove to Newtown during their last visit, 94% parked their car in Newtown.
- Among those who parked in Newtown, 61% parked for free and 27% paid for parking (12% unsure).
- Parking on King Street accounted for 14%.

Drove to Newtown

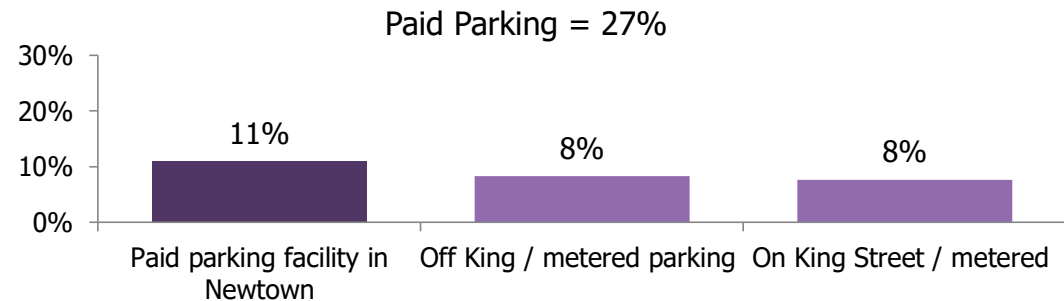


KING STREET = 14%

Type of Parking



Average Spend on Paid Parking = \$15



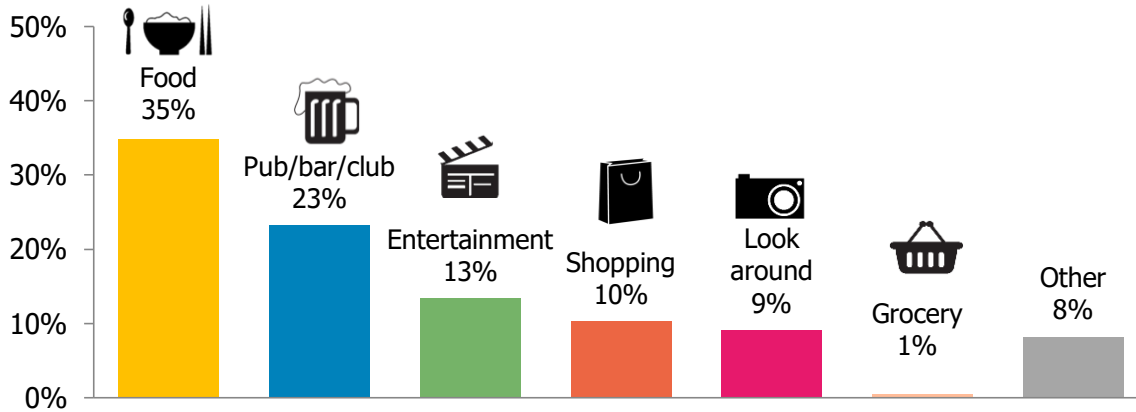
Base=446,090 Past 12 Month Visitors to Newtown for leisure who drove



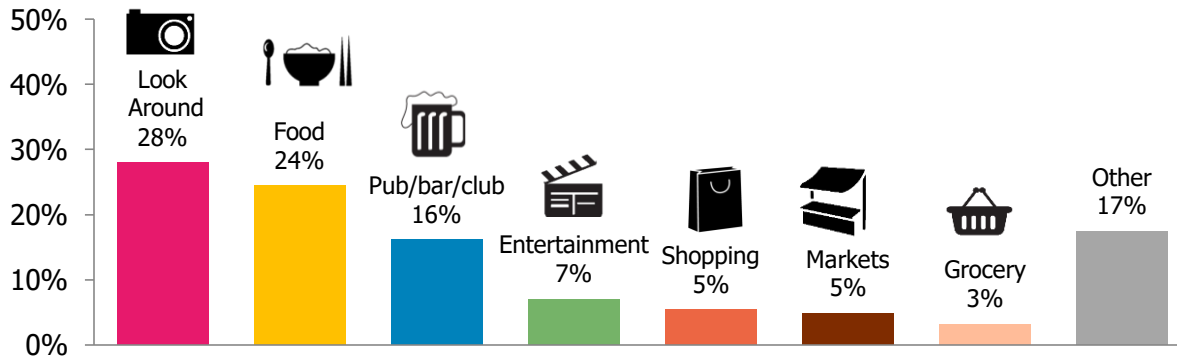
Reason for Visit

- Food (59%) and beverages (23%) are two leading reasons to visit the Newtown Precinct at *** when netted.
- Other reasons to visit include just having a look around (37%), Entertainment (20%) & shopping (16%)

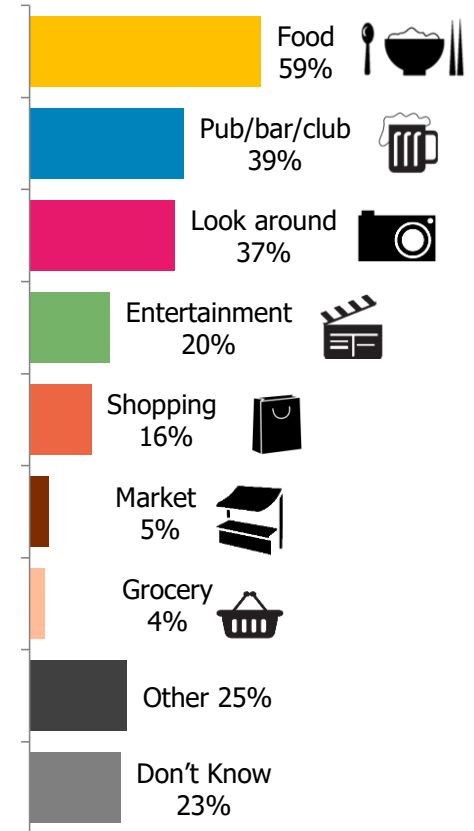
Main reason



Other reasons



All reasons combined



Base=854,490 Past 12 Month Visitors to Newtown for leisure

Last Visit Spend



Dinner @ Hartsyard

\$51



Lunch for 2 & 2 x Jugs Young Henry's Newtowner @ The Bank

\$81



Change to the busker & copy of The Big Issue

\$12



Tickets to show @ Enmore Theatre

\$76



Newtown Jet's adult jersey & kid's tee

\$64



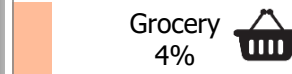
2 Records and 1 paperback @ Newtown Markets

\$23



Groceries @ Lloyd's IGA

\$51



1 Adult & 2 kids pool entry @ Victoria Park

\$13



Average Spend Across All Categories

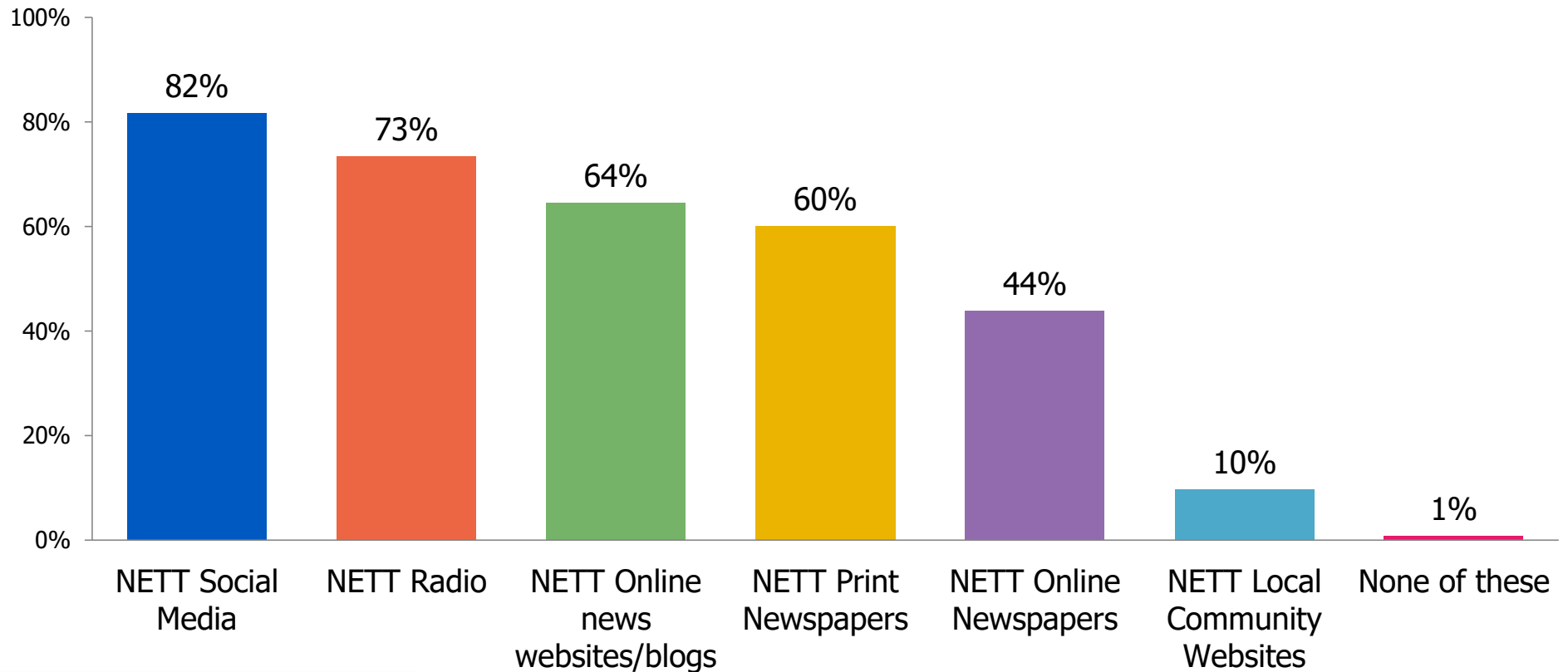
\$46

- The total average spend across all categories for a day in Newtown is \$46.
- The categories with the highest spend are a visit to a pub, bar or nightclub at \$81, then retail shopping at \$64.
- The average spend on a meal at a café or restaurant is \$51, the same as a supermarket, grocery or pharmacy shop.

Base=504,150 Past 12 Month Visitors to Newtown for leisure & spent money on their last visit

Media – monthly engagement

- Social media is the most commonly used media among P12M Newtown Visitors with 82% engaging with some form of social media at least once a month.
- Radio is in the second position on 73% followed by online news websites/blogs at 64%



Base=854,490 Past 12 Month Visitors to Newtown for leisure

Social Media

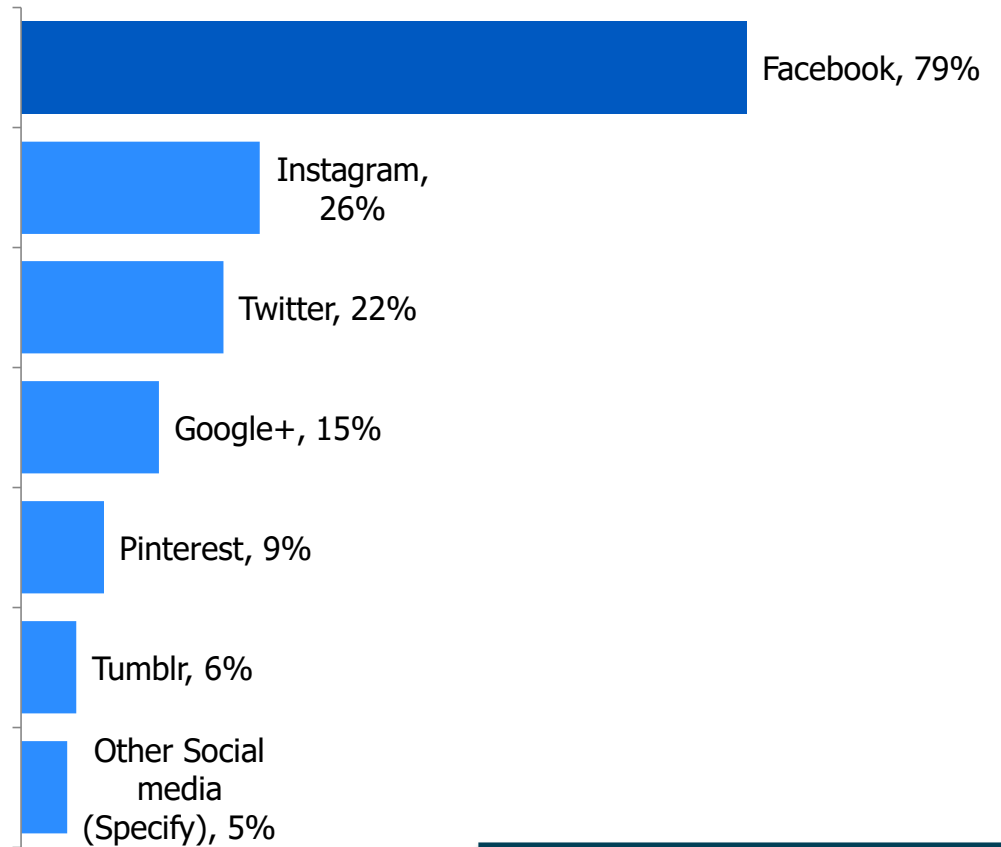
- Among the 82% of P12M Newtown Visitors who use social media, 79% engage with Facebook at least once per month.

82%



Social Media

Base=854,490 Past 12 Month
Visitors to Newtown for leisure



Base=854,490 Past 12 Month
Visitors to Newtown for leisure

Radio

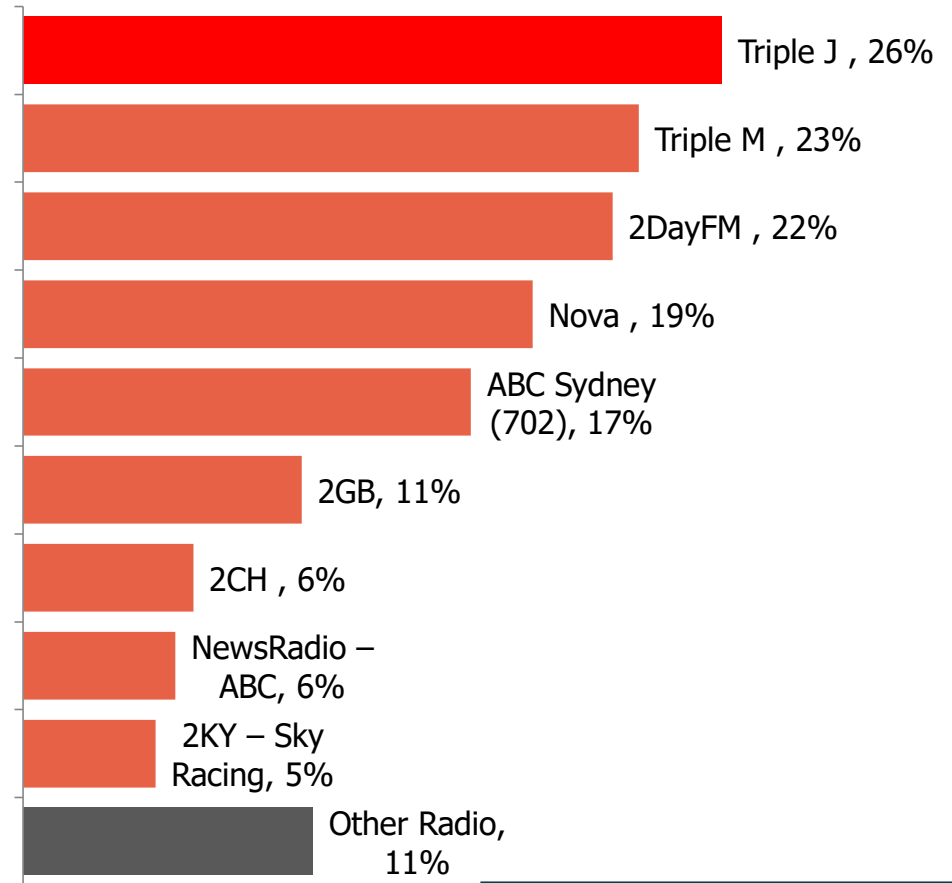
- Among the 73% of P12M Newtown Visitors who listen to the radio at least once per month, Triple J is the most popular station at 26%.

73%



Radio

Base=854,490 Past 12 Month Visitors to Newtown for leisure



Base=854,490 Past 12 Month Visitors to Newtown for leisure

Online News Websites

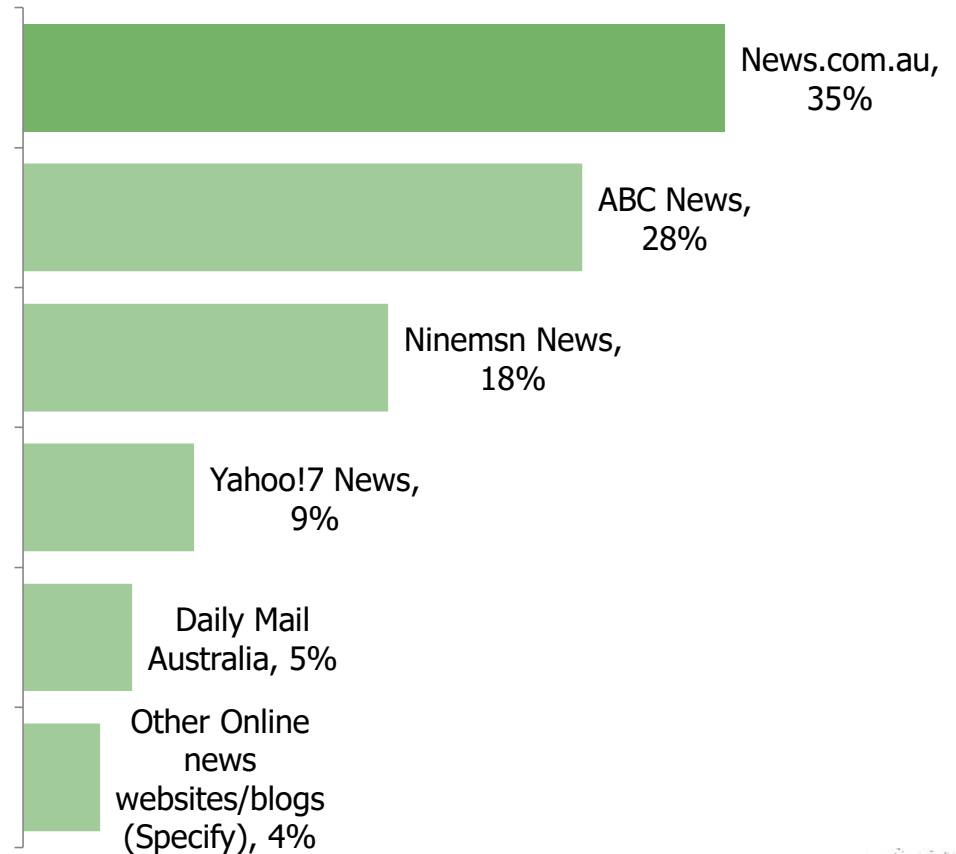
- Among the 64% of P12M Newtown Visitors who visited online news websites at least once per month, The News.com is the most popular online news source at 35%.

64%



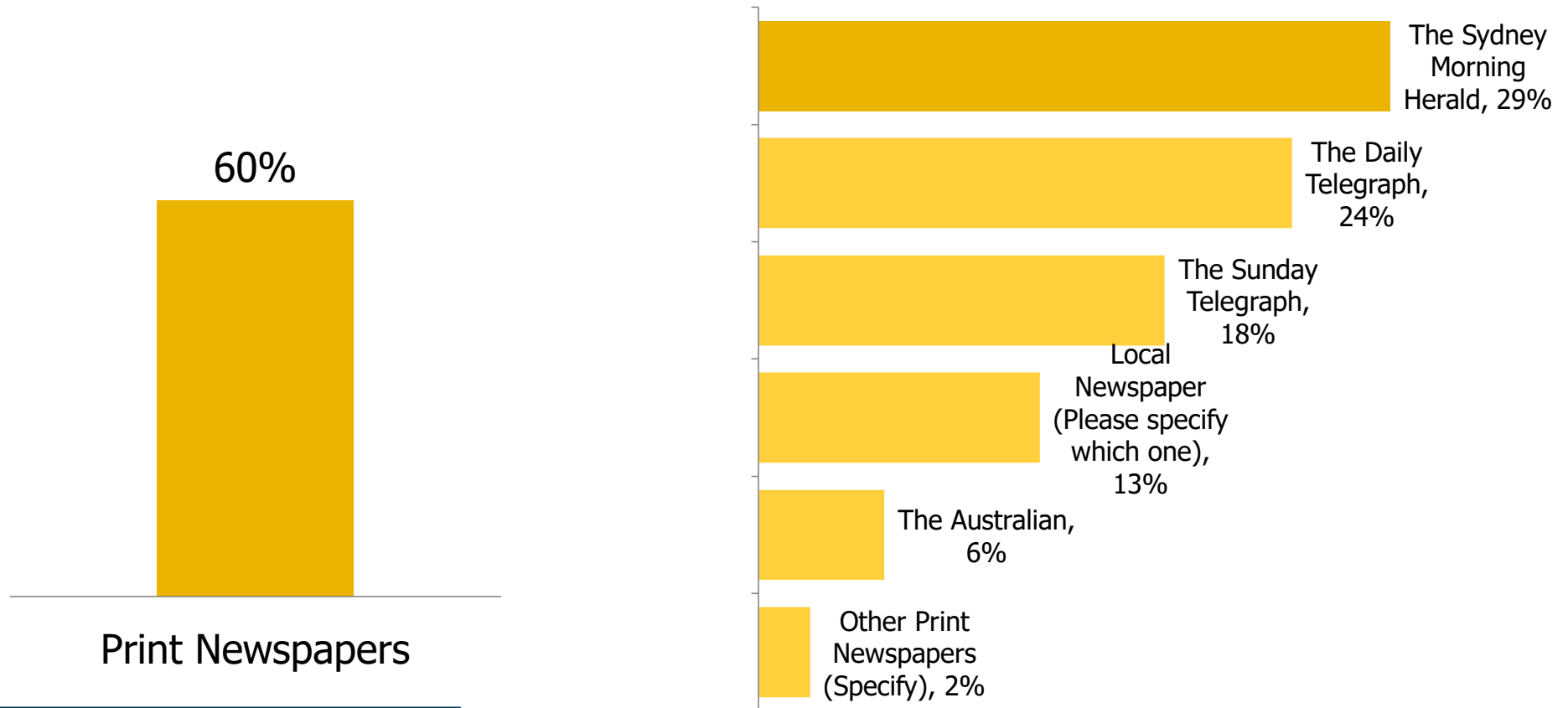
Online News Websites

Base=854,490 Past 12 Month Visitors to Newtown for leisure



Print News Papers

- Among the 60% of P12M Newtown Visitors who read print newspapers at least once per month, The Sydney Morning Herald is the most popular paper at 29%.



Base=854,490 Past 12 Month Visitors to Newtown for leisure

Online News Papers

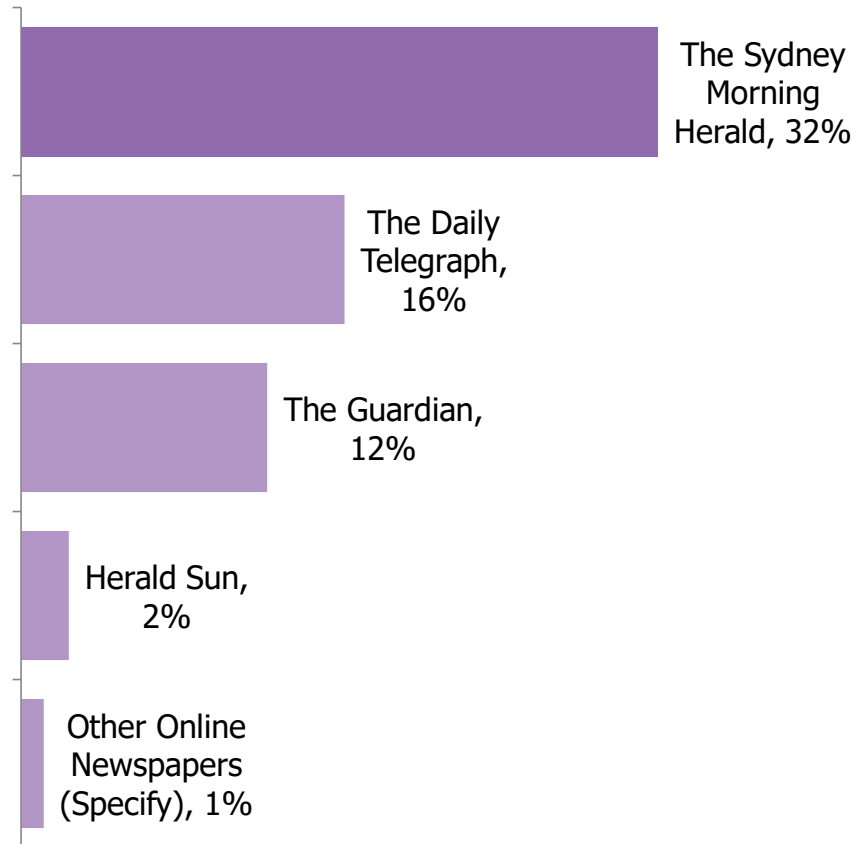
- Among the 64% of P12M Newtown Visitors who read online news papers at least once per month, The Sydney Morning Herald is the most popular online news source at 32%.

44%



Online News Papers

Base=854,490 Past 12 Month
Visitors to Newtown for leisure



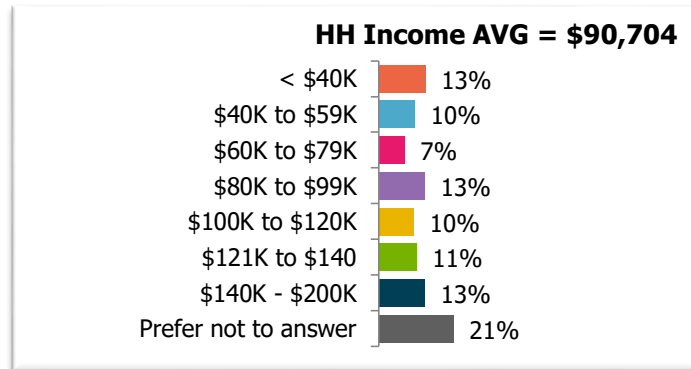
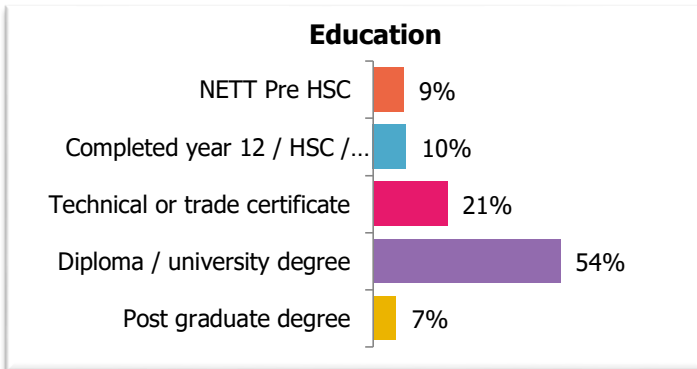
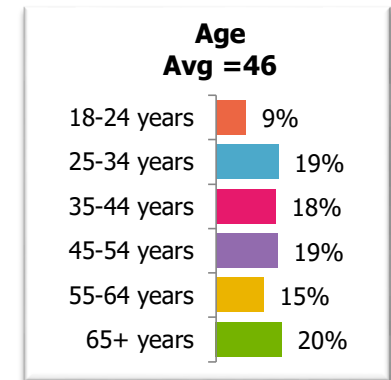
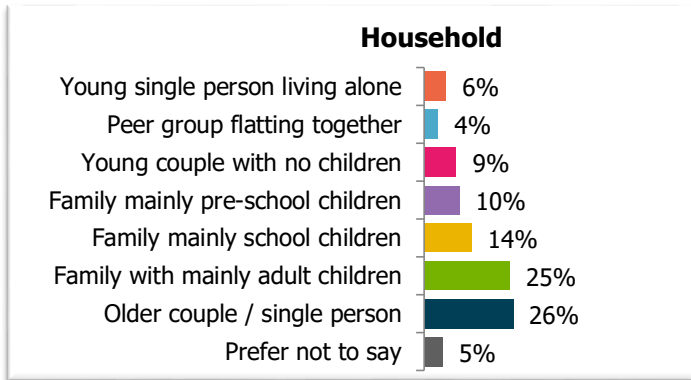
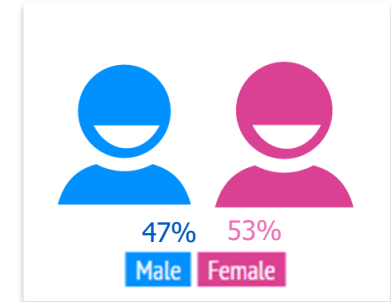
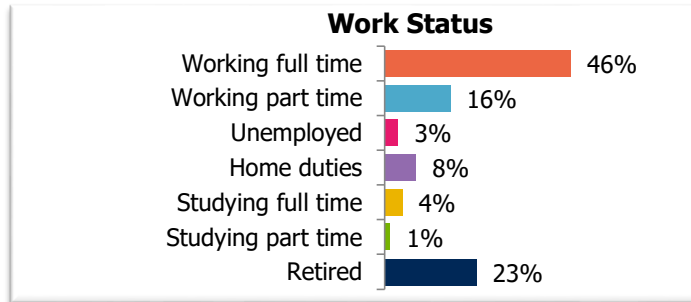


Main Findings

Non Visitors

Non Visitors

- The weighted sample of Past 12 month Non Visitors to Newtown has a population of 2,240,380 with an equal male to female ratio.
- The average age is 46 years, slightly older than visitors, with 50% in older households.

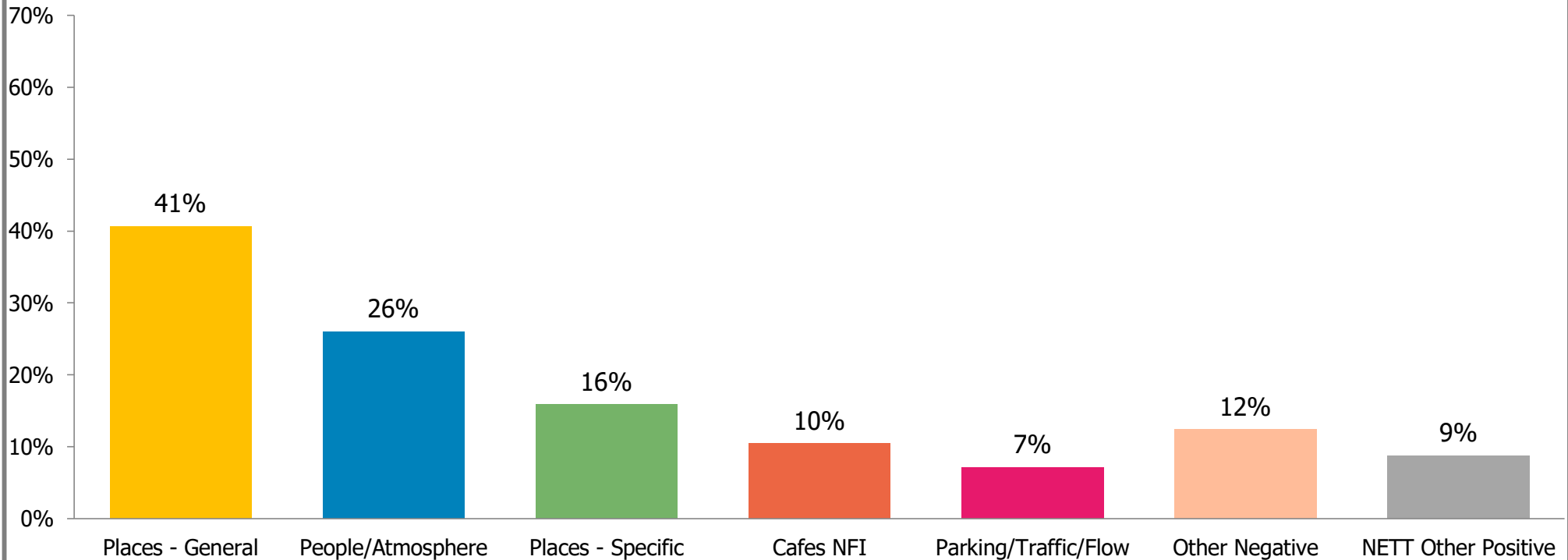


Base=2,243,380
Past 12 Month
Non Visitors to
Newtown



Impressions of Newtown – Do Not Plan To Visit in N6M

- General places such as cafes, restaurants, pubs and bars, shops and shopping were mentioned as coming to mind when thinking about Newtown for 41% of N6M Non Visitors, significantly lower than Visiting Intenders on 59%.
- Non Visitors struggled to name specific places in Newtown and were significantly lower on 16% compared to Intending Visitors on 33%.



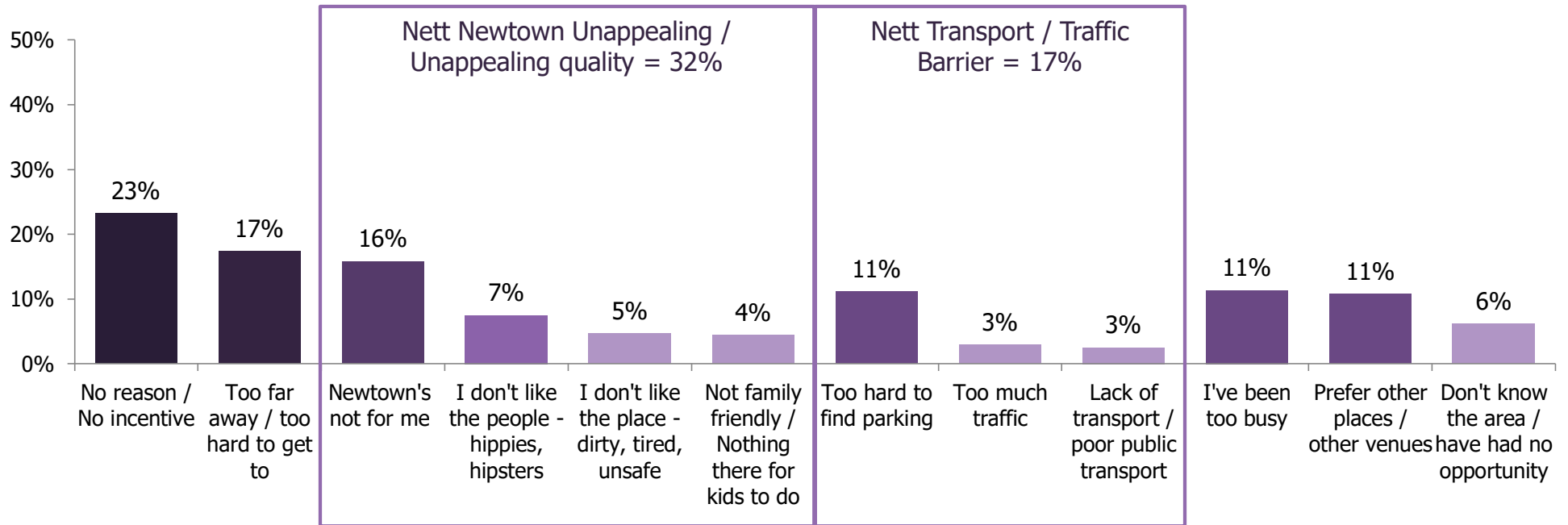
Base=2,644,460 No Plan to Visit
in Next 6 Months

NEWTOWN
PRECINCT

Barriers to Visitation

- The largest single barrier to visiting Newtown is having a compelling reason to go.
- When netted, finding Newtown or a perceived aspect of Newtown unappealing accounts for 32%.

To Newtown

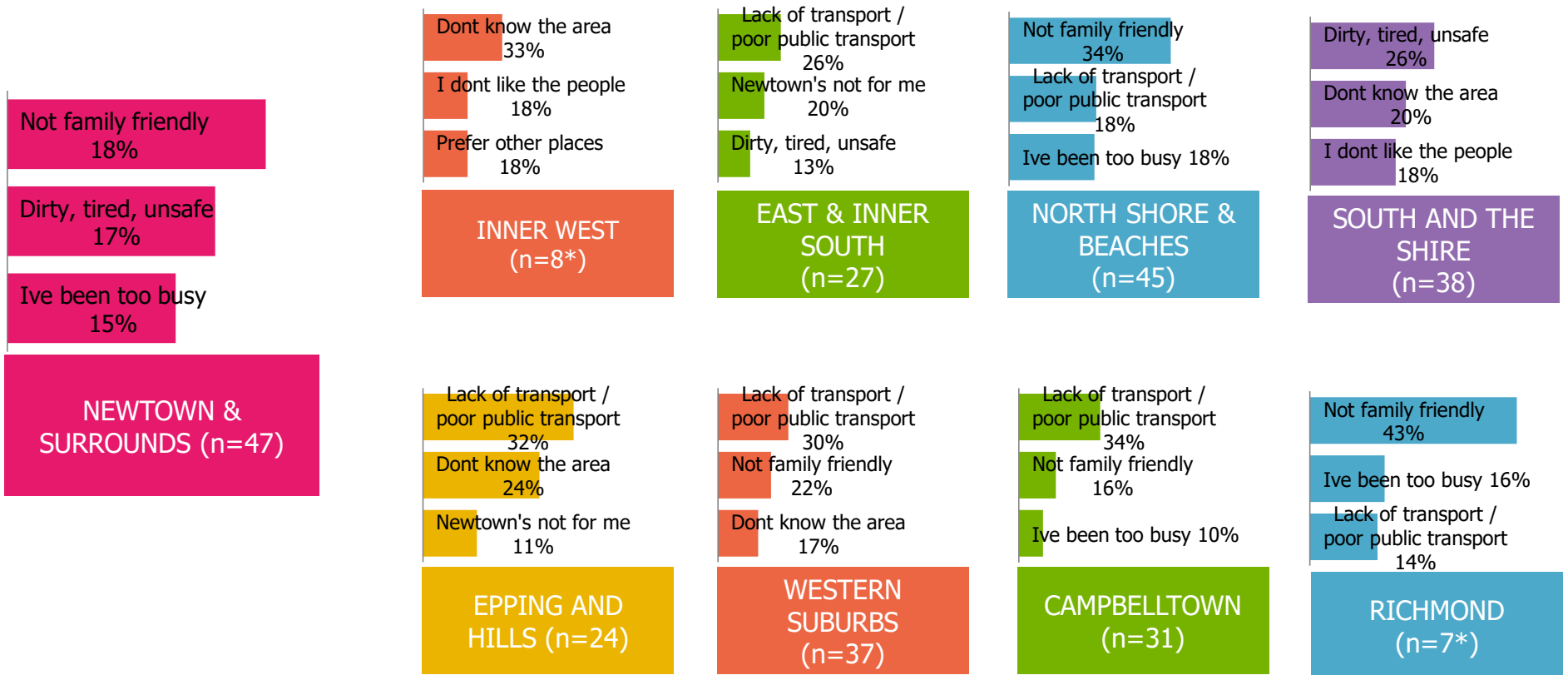


Base=2,243,380 Past 12 Month
Non Visitors to Newtown



Top 3 Barriers to Visitation by Region

- For residents in the Newtown area, 18% claimed not to visit because Newtown isn't family friendly.
- In the Inner West, it was because they didn't know the area and in the East & Inner South, because of a lack of public transport.



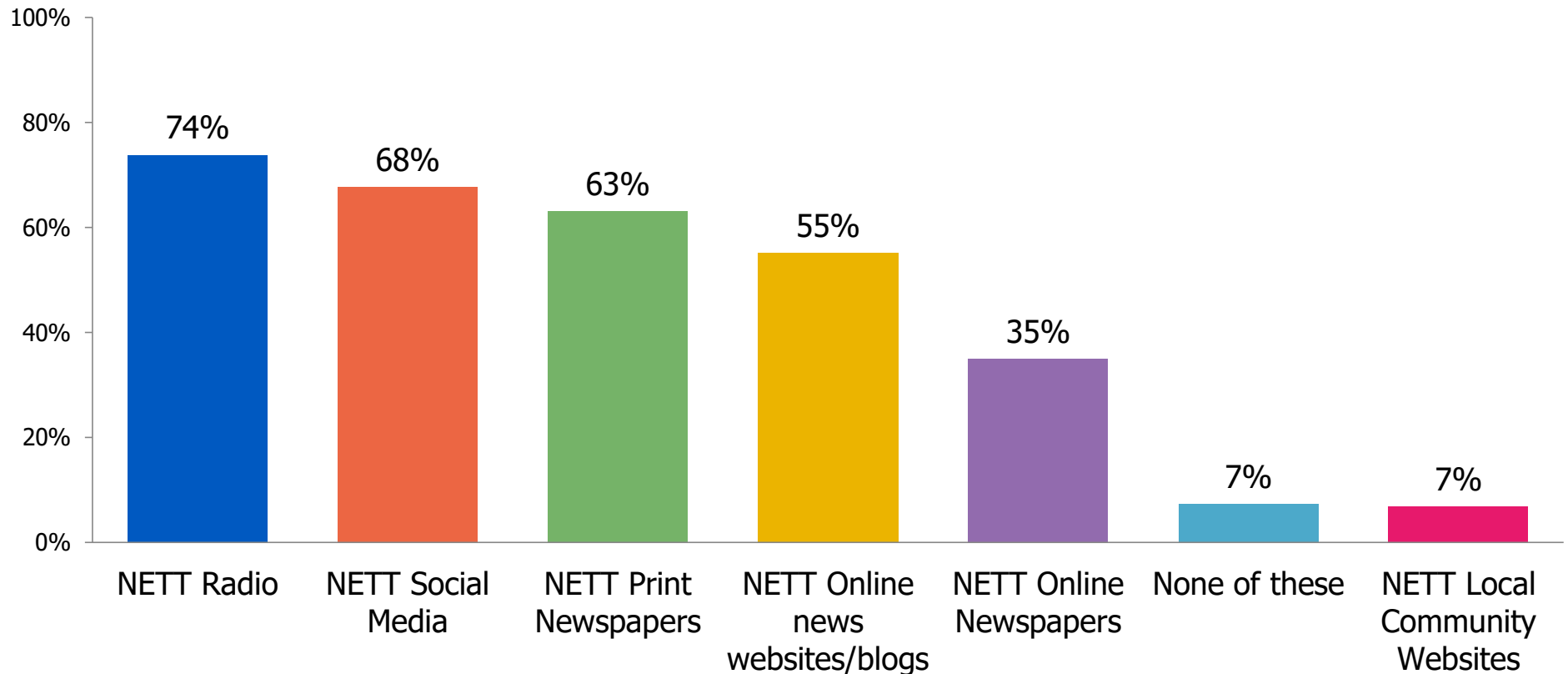
Base=2,243,380 Past 12 Month Non Visitors to Newtown

**Caution – low base*



Media – monthly engagement

- Social media is the most commonly used media among P12M Non Newtown Visitors with 74% engaging with some form of social media at least once a month.
- Radio is in the second position on 68% followed by online news websites/blogs at 63%



Base=2,243,380 Past 12 Month
Non Visitors to Newtown



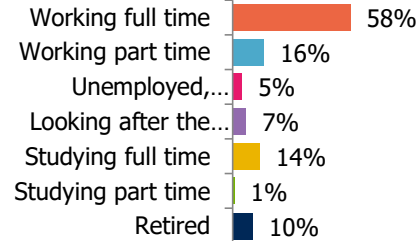
Main Findings

Intenders

Intenders

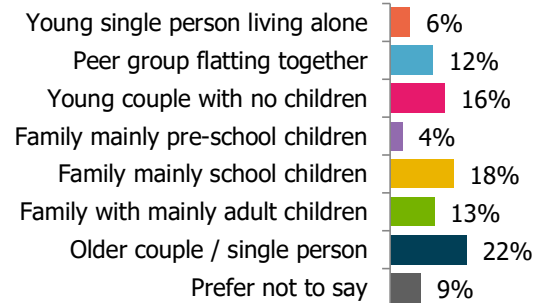
- The weighted sample of Next 6 month Newtown visitor intenders has a population of 716,840.
- The average age is 40 years, with an equal male to female ratio.

Work Status



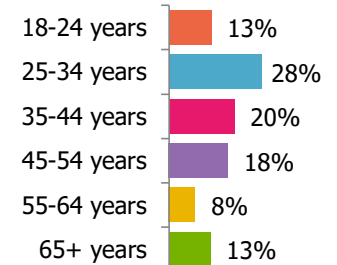
49% Male 51% Female

Household

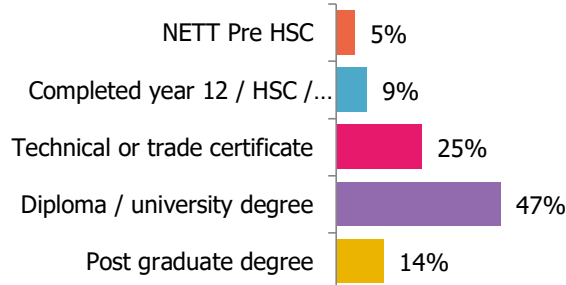


Age

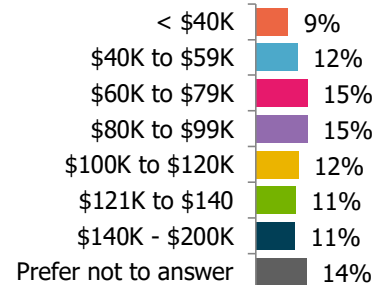
Avg = 40



Education



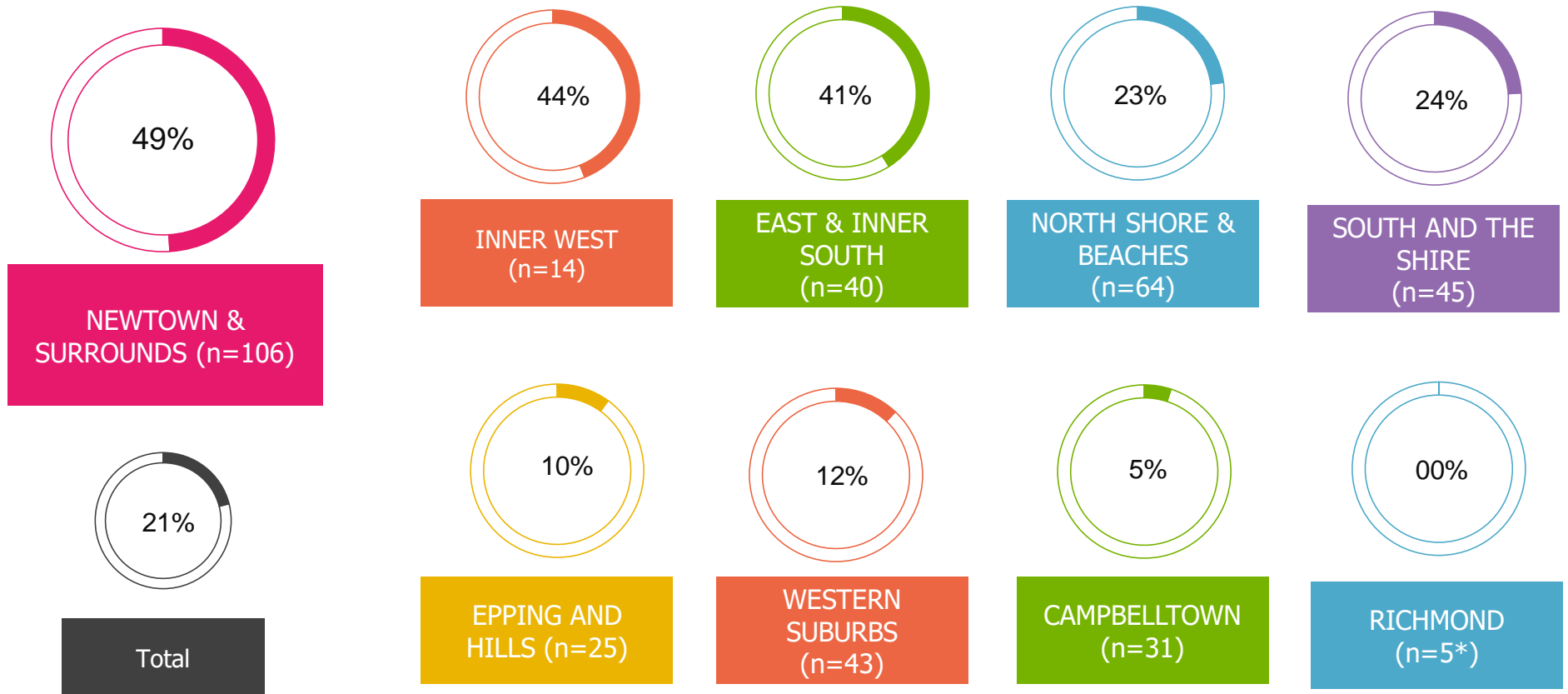
HH Income AVG = \$90,165



Base=716,840 Next 6 Month Newtown Visitor Intenders

N6M Visitation to Newtown

- Around 1 in 2 residents from Newtown & Surrounds expect to visit Newtown for leisure in the next 6 months.
- Residents from the Inner West have the highest next 6 months leisure visitation expectation to the precinct from another region at 44%.



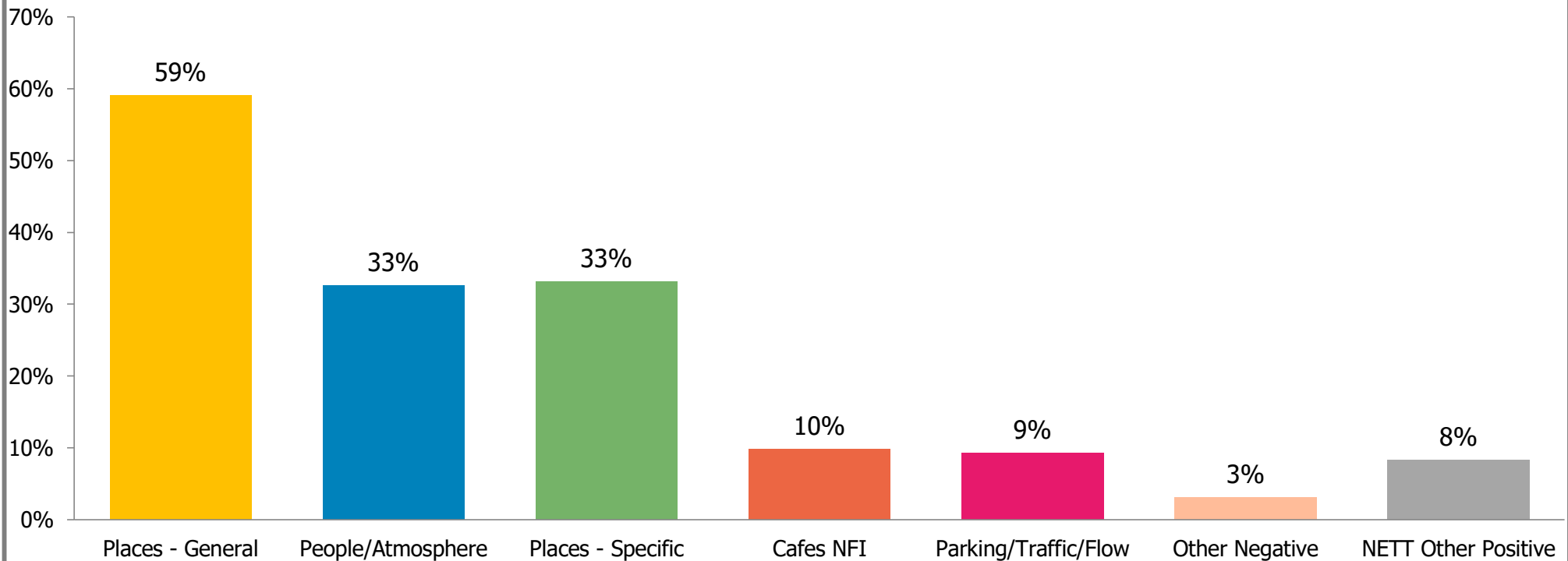
Base=716,840 Next 6 Month
Newtown Visitor Intenders



Q7b. And which of the following areas or precincts have you been to for a leisure outing in the past 12 months?

Impressions of Newtown

- General places such as cafes, restaurants, pubs and bars, shops and shopping were mentioned as coming to mind when thinking about Newtown for 59% of N6M visitors.
- The People / Atmosphere was mentioned by 33% and specific places, such as King Street, the Enmore Theatre & Dendy were also mentioned by 33%



Base=716,840 Next 6 Month
Newtown Visitor Intenders



Thinking of Newtown – General places

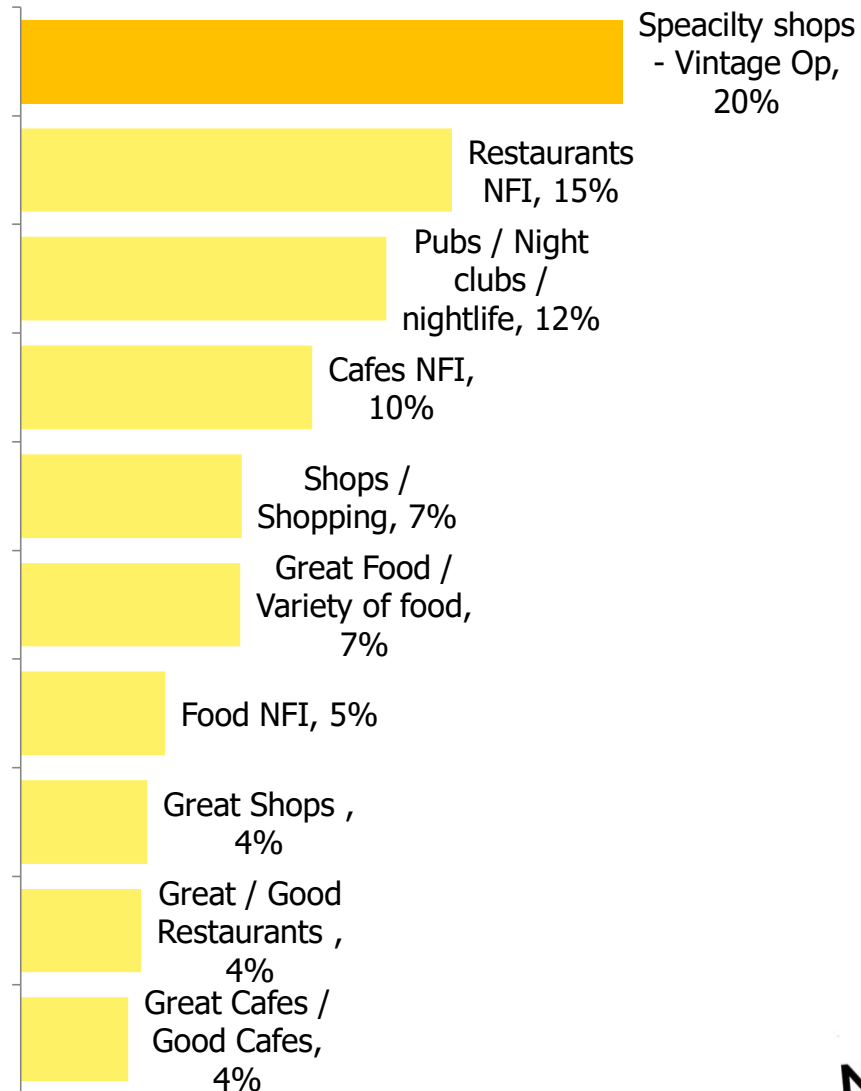
- When mentioning general places, Specialty Shops such as Vintage, Boutique, Antique, Opportunity and Book shops were the most frequently mentioned at 20%.
- Restaurants were the next most often mentioned at 15%.

59%



General Places

Base=716,840 Next 6 Month
Newtown Visitor Intenders



Thinking of Newtown – People / Atmosphere

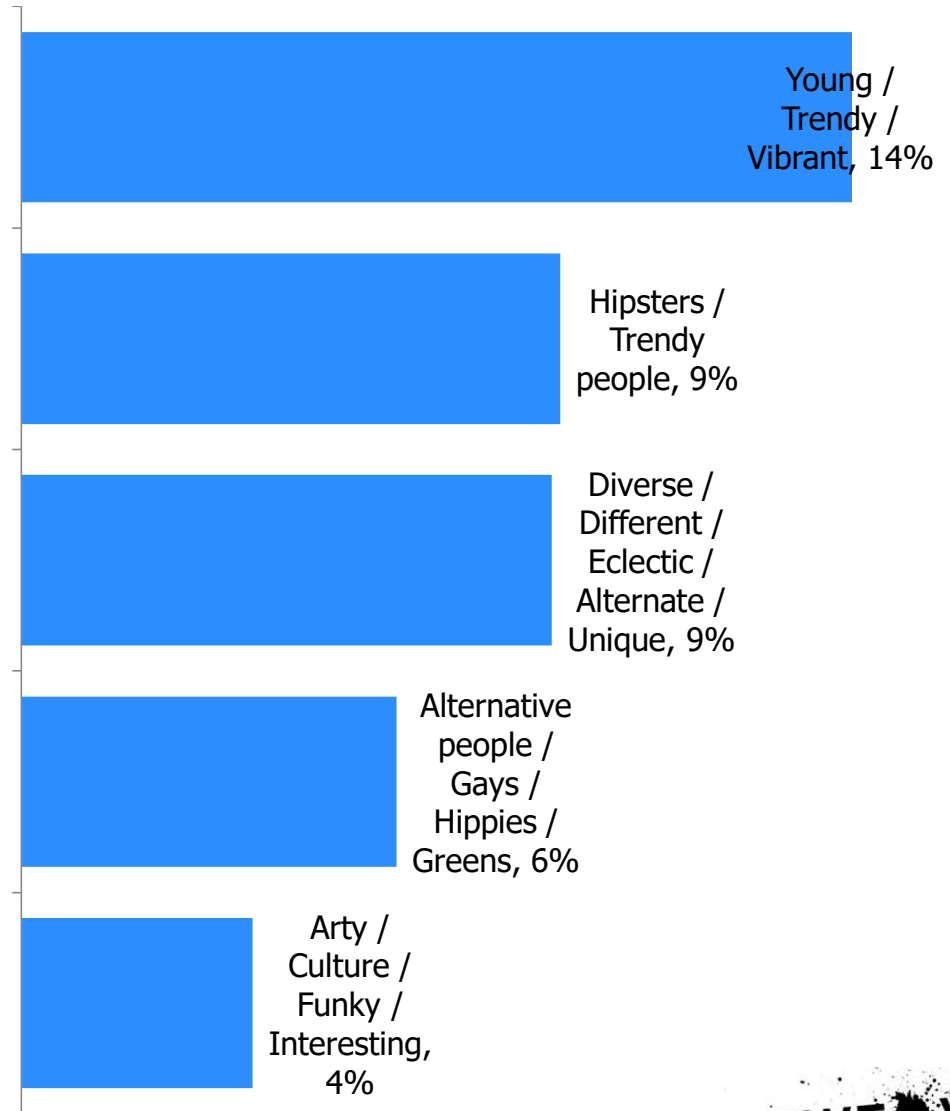
- When mentioning people / atmosphere, the most common mention was Young / Trendy / Vibrant people at 14%.
- Hipsters were mentioned by 9% as was Newtown as a Divers / Different / Eclectic & Alternate place.

38%



People / Atmosphere

Base=716,840 Next 6 Month
Newtown Visitor Intenders



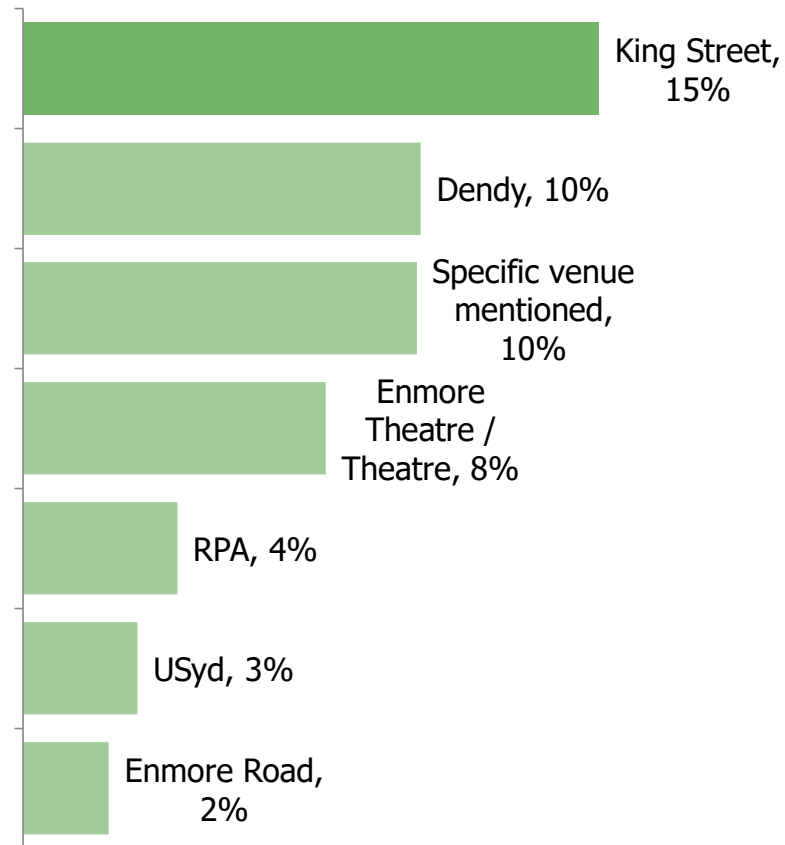
Thinking of Newtown – Specific Places Mentioned

- When mentioning specific places, King Street had the most mentioned at 15%, followed by The Dendy on 10%.
- Specific Venues (e.g. The Bank, The Townie, The Vanguard) which when netted came to 10%, but were various enough that no one specific venue came to <2%.
- The Enmore Theatre was mentioned by 8%.

33%

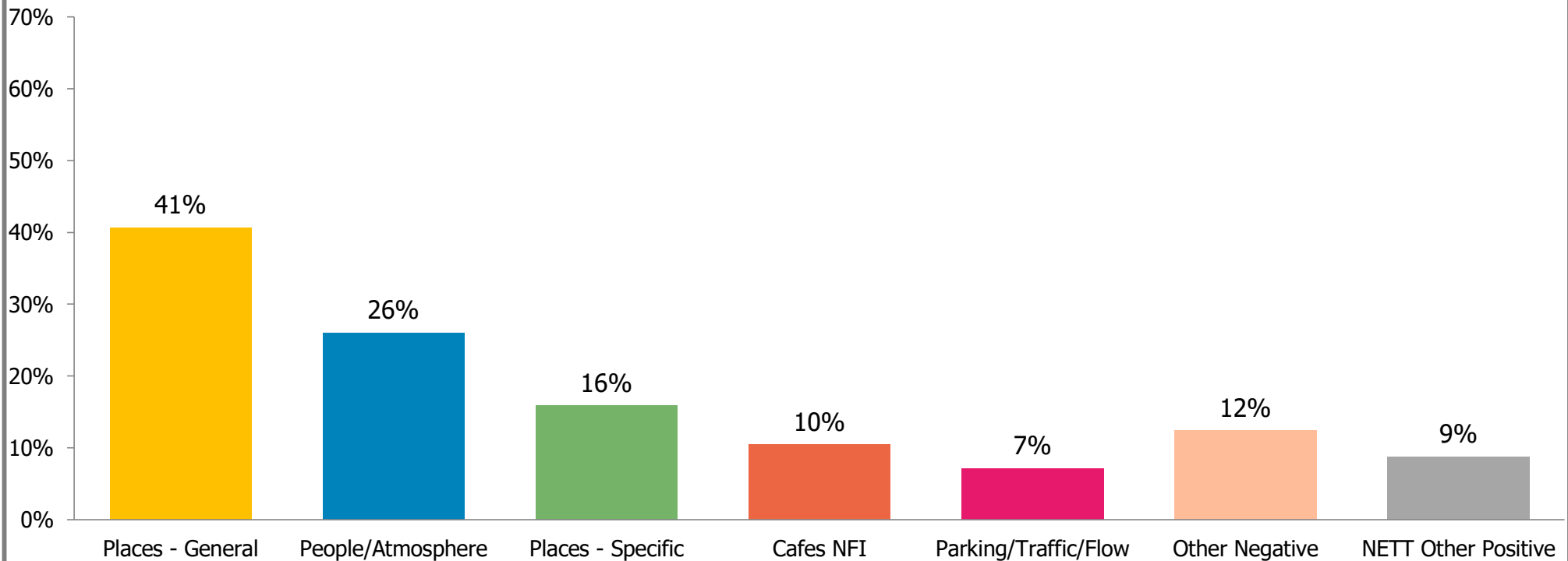
Specific Place Mentioned

Base=716,840 Next 6 Month
Newtown Visitor Intenders



Impressions of Newtown – Do Not Plan To Visit in N6M

- General places such as cafes, restaurants, pubs and bars, shops and shopping were mentioned as coming to mind when thinking about Newtown for 41% of N6M Non Visitors, significantly lower than Visiting Intenders on 59%.
- Non Visitors struggled to name specific places in Newtown and were significantly lower on 16% compared to Intending Visitors on 33%.

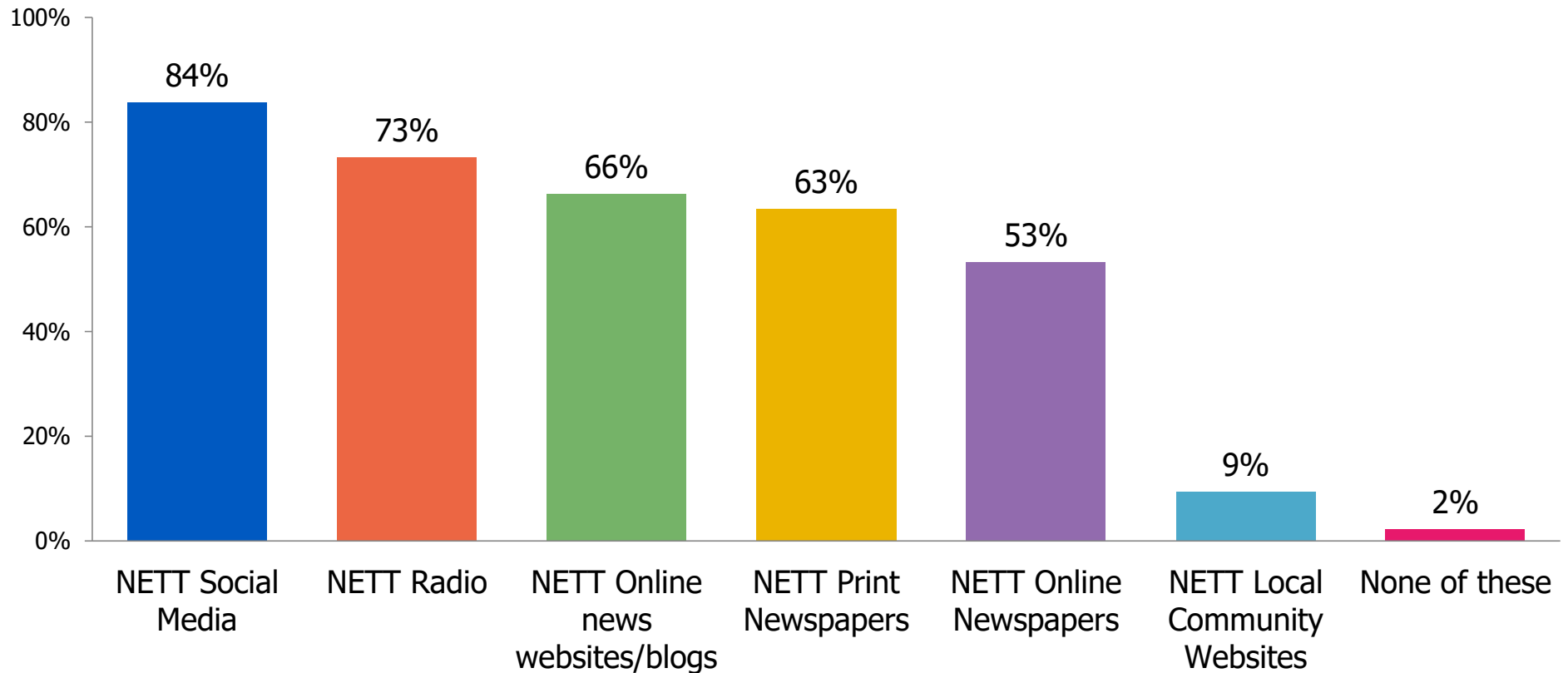


Base=2,644,460 No Plan to Visit
in Next 6 Months

NEWTOWN
PRECINCT

Media – monthly engagement

- Social media is the most commonly used media among N6M Newtown Visitors with 84% engaging with some form of social media at least once a month.
- Radio is in the second position on 73% followed by online news websites/blogs at 66%



Base=716,840 Next 6 Month
Newtown Visitor Intenders



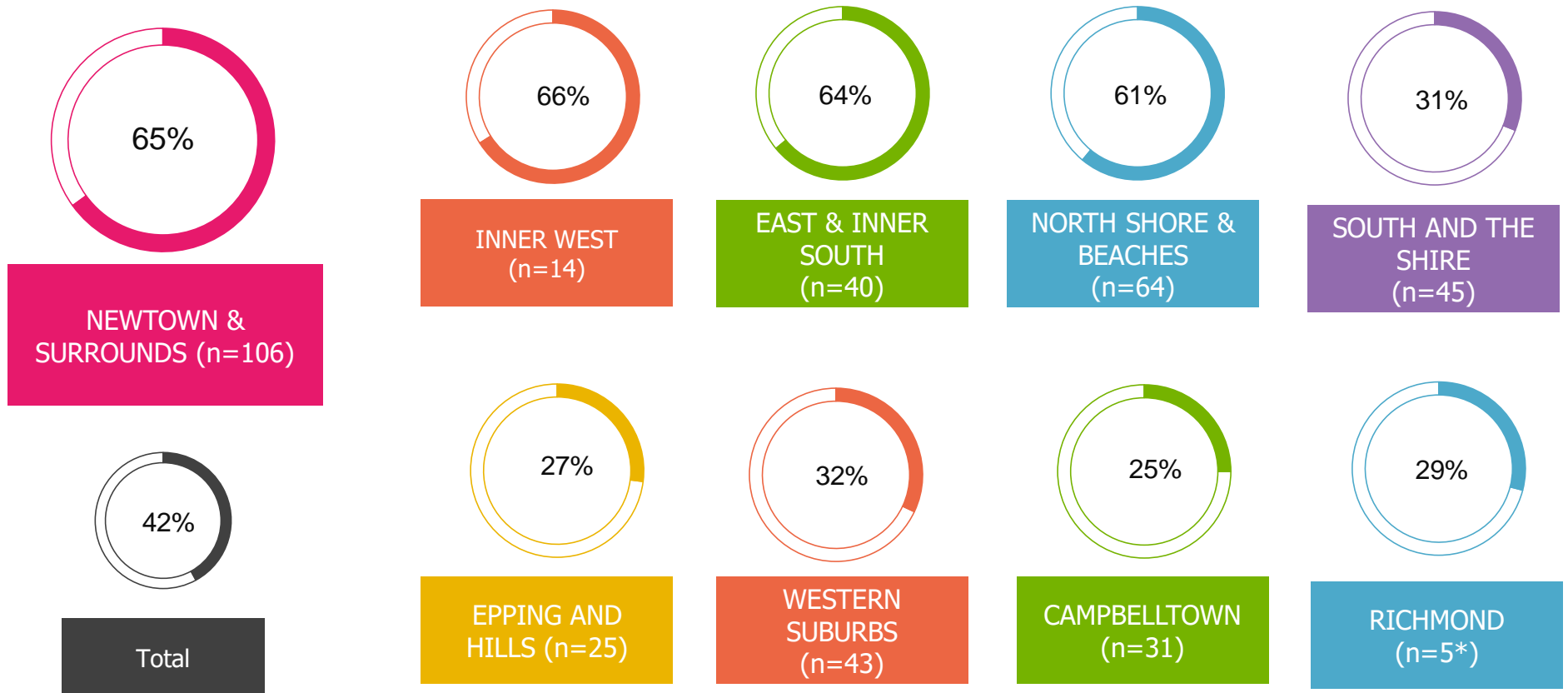


Main Findings

Visiting Newtown for Leisure by Region

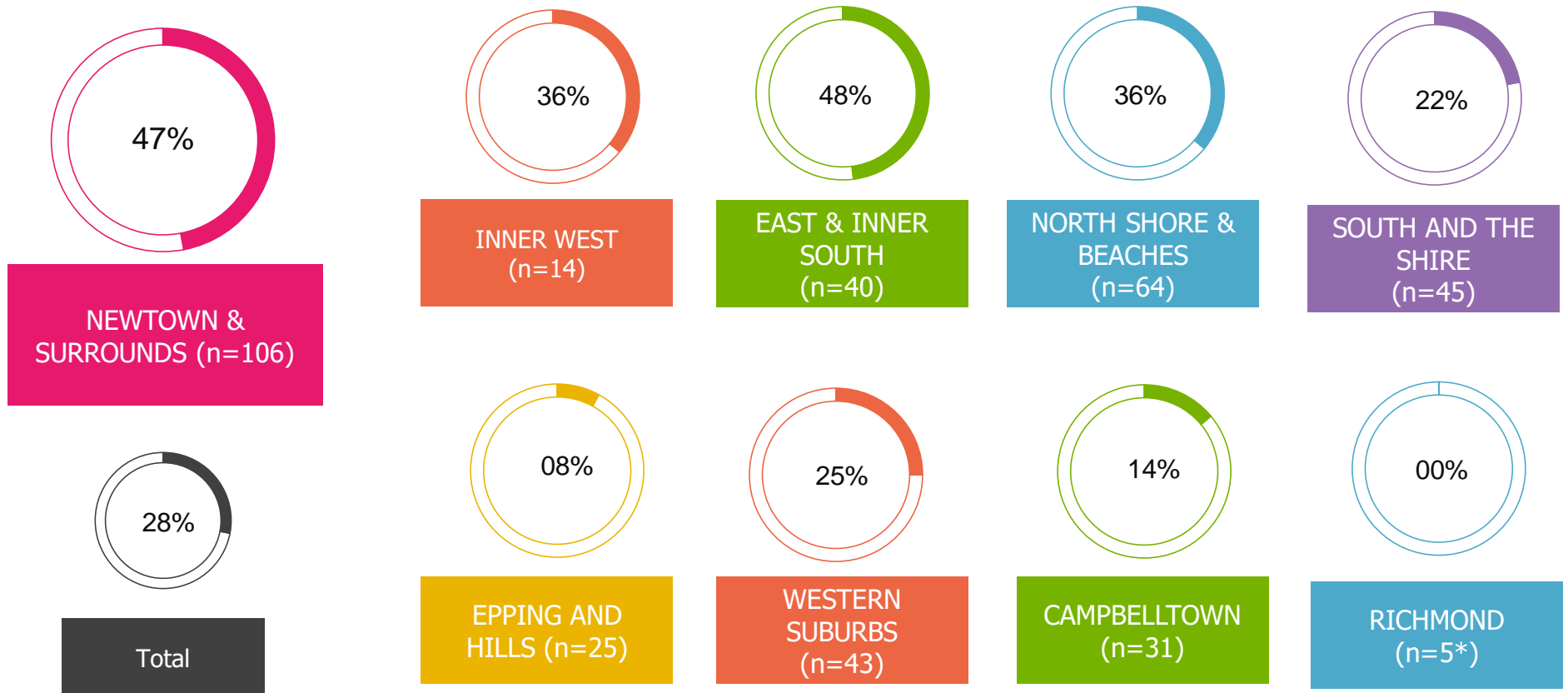
Ever Visited Newtown

- Among residents who live in Newtown & surrounds, 65% have ever visited Newtown for leisure.
- Around 2 in 3 residents from the Inner West have visited Newtown at some point for leisure.
- Just under 2 in 3 residents of the East & Inner South have visited and around 6 in 10 from the North Shore & Nth Beaches.



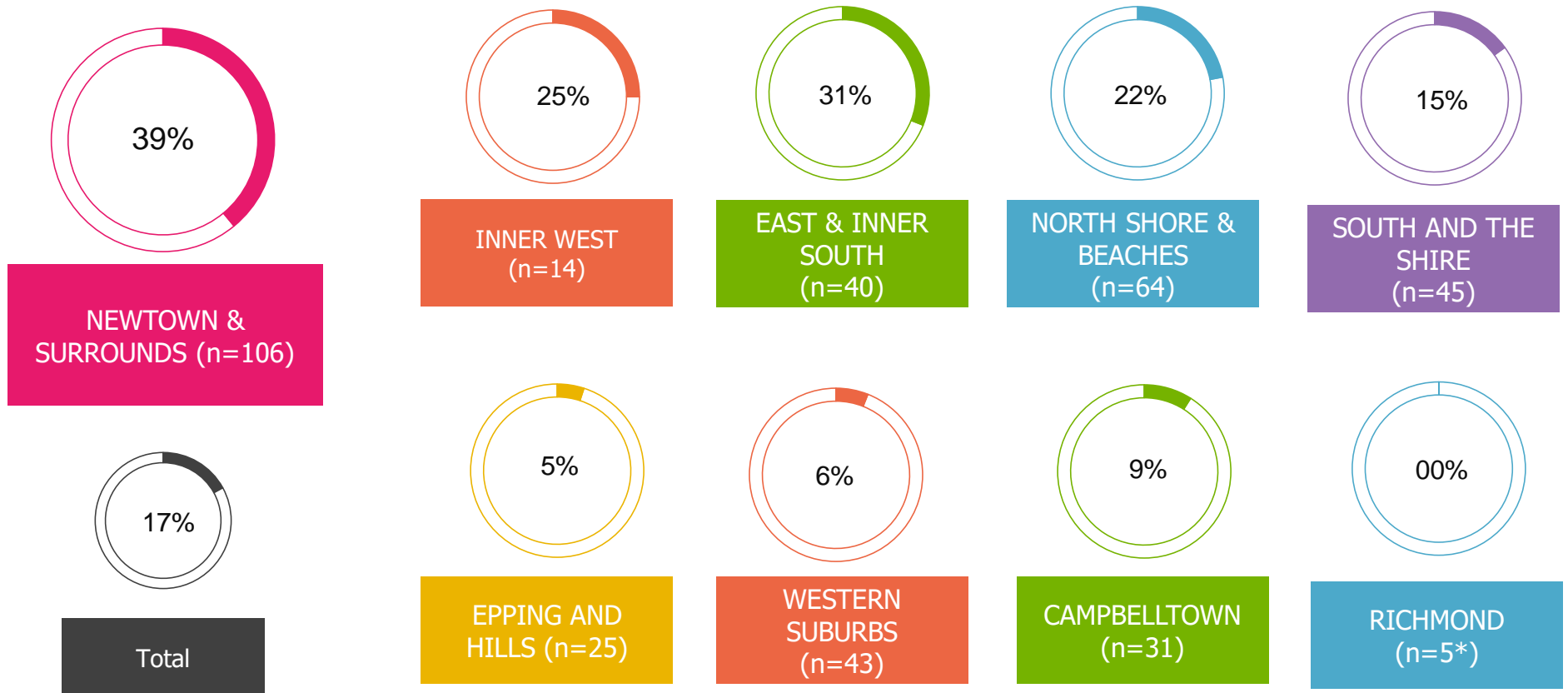
P12M Visitation

- In the past 12 months, the 47% residents from Newtown & Surrounds have visited Newtown for leisure.
- Residents from the East and Inner South have had the highest visitation to the precinct for leisure at 48%.



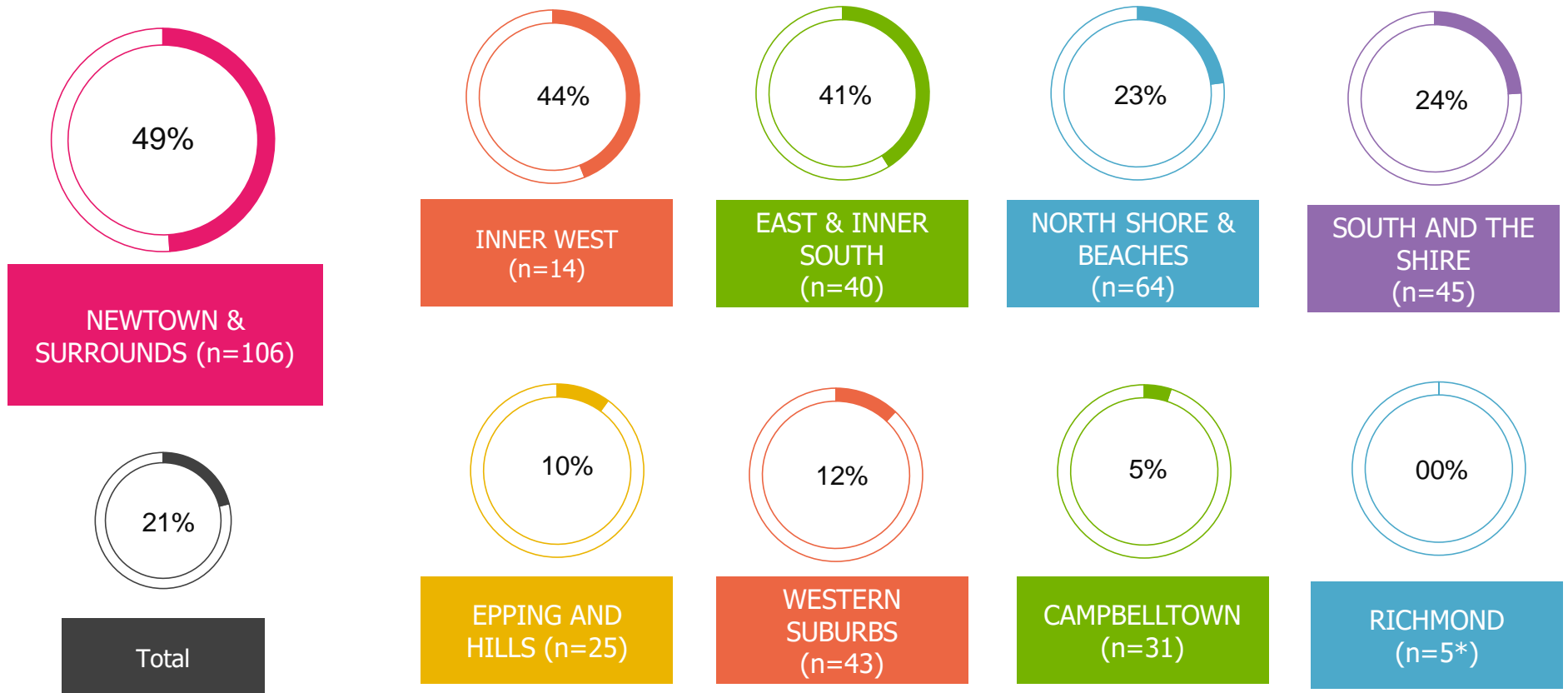
P3M Visitation to Newtown

- In the past 3 months, the 39% residents from Newtown & Surrounds have visited Newtown for leisure.
- Residents from the East and Inner South have had the highest leisure visitation to the precinct from another region at 31%.



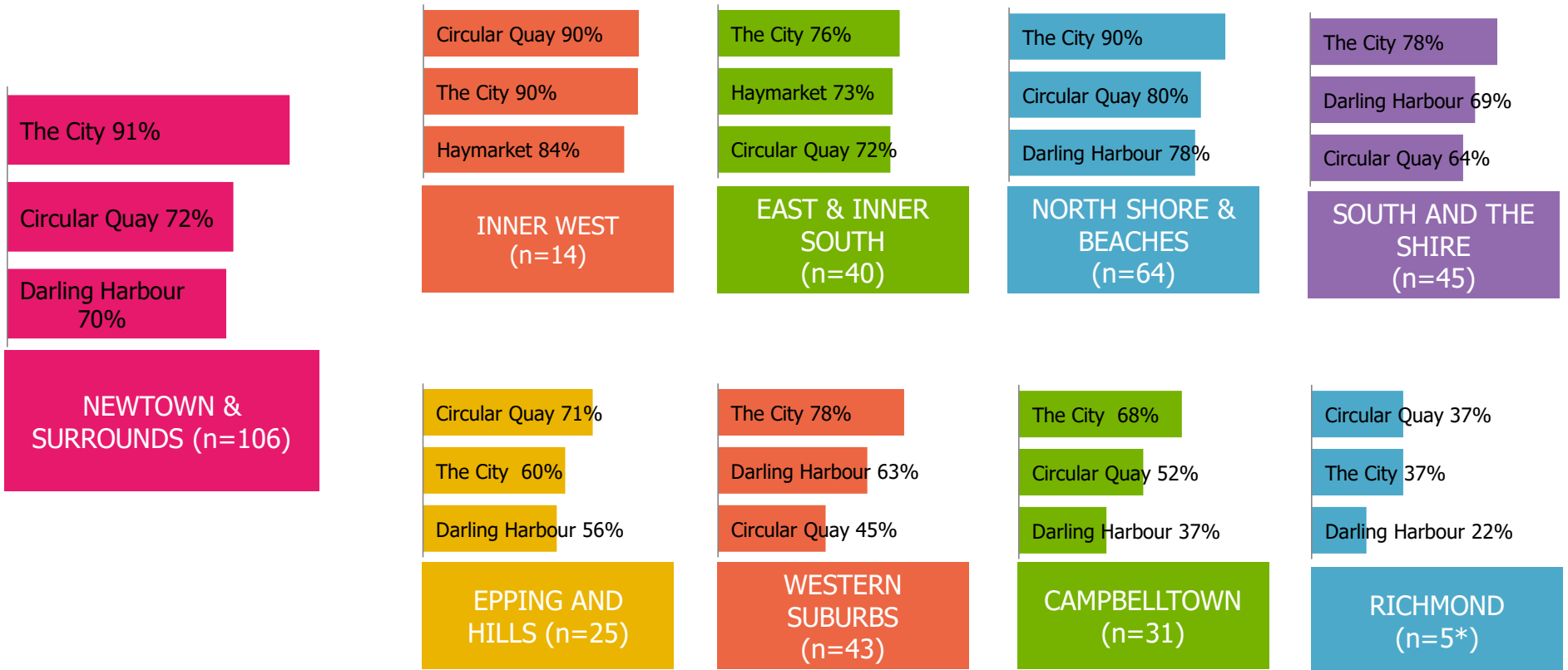
N6M Visitation to Newtown

- Around 1 in 2 residents from Newtown & Surrounds expect to visit Newtown for leisure in the next 6 months.
- Residents from the Inner West have the highest next 6 months leisure visitation expectation to the precinct from another region at 44%.



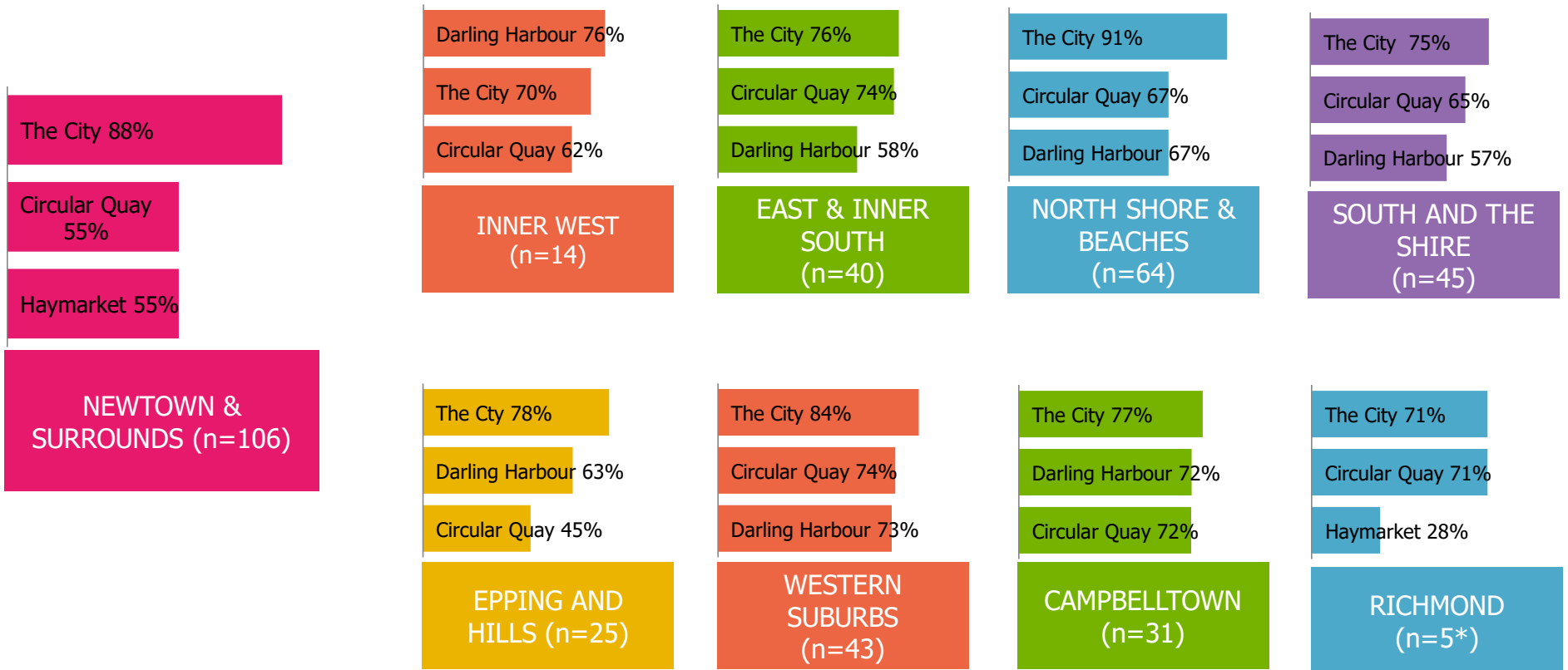
Top 3 Precincts Ever Visited

- For Newtown residents, the top 3 destinations ever visited for leisure are The City at 91% followed by Circular Quay at 72% and Darling Harbour at 70%.



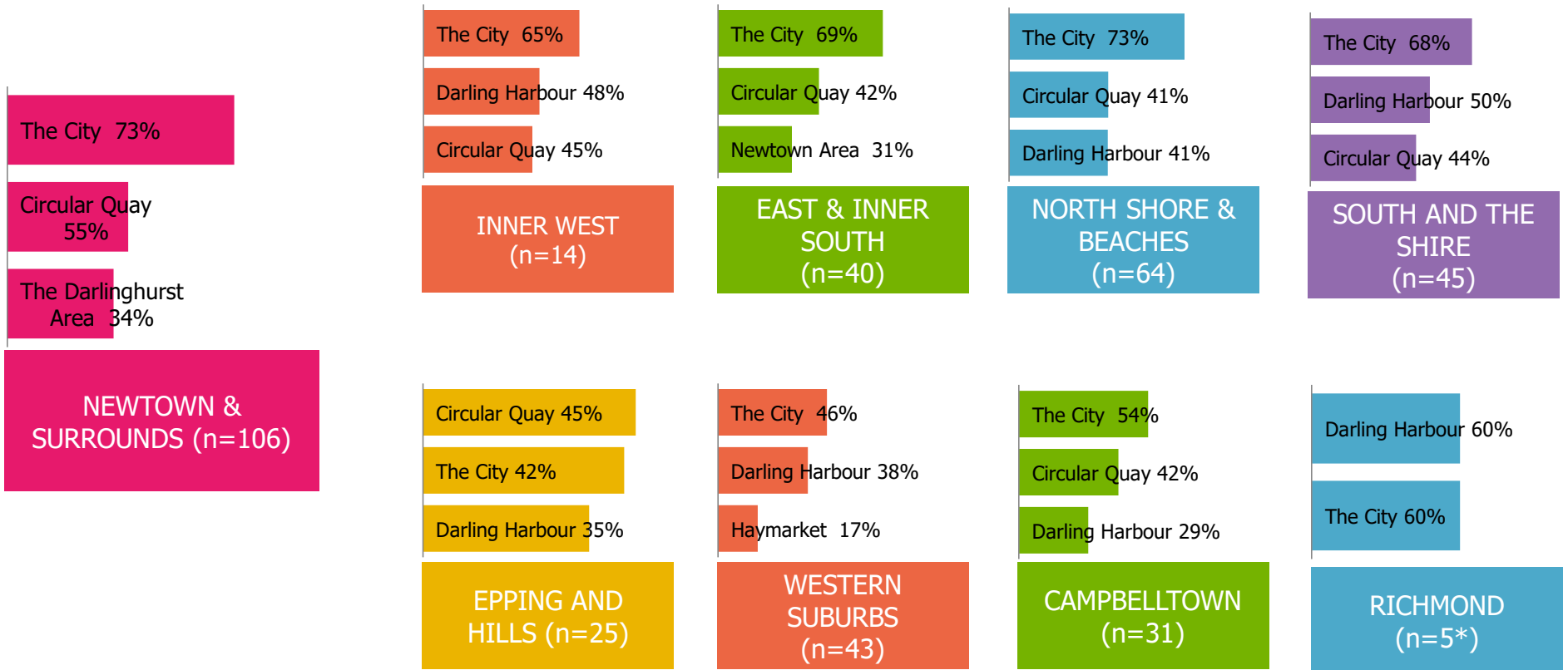
Top 3 Precincts Past 12 Months

- For Newtown residents, the top 3 destinations for leisure in the past 12 months are The City at 88% followed by Circular Quay and Darling Harbour at 55%.



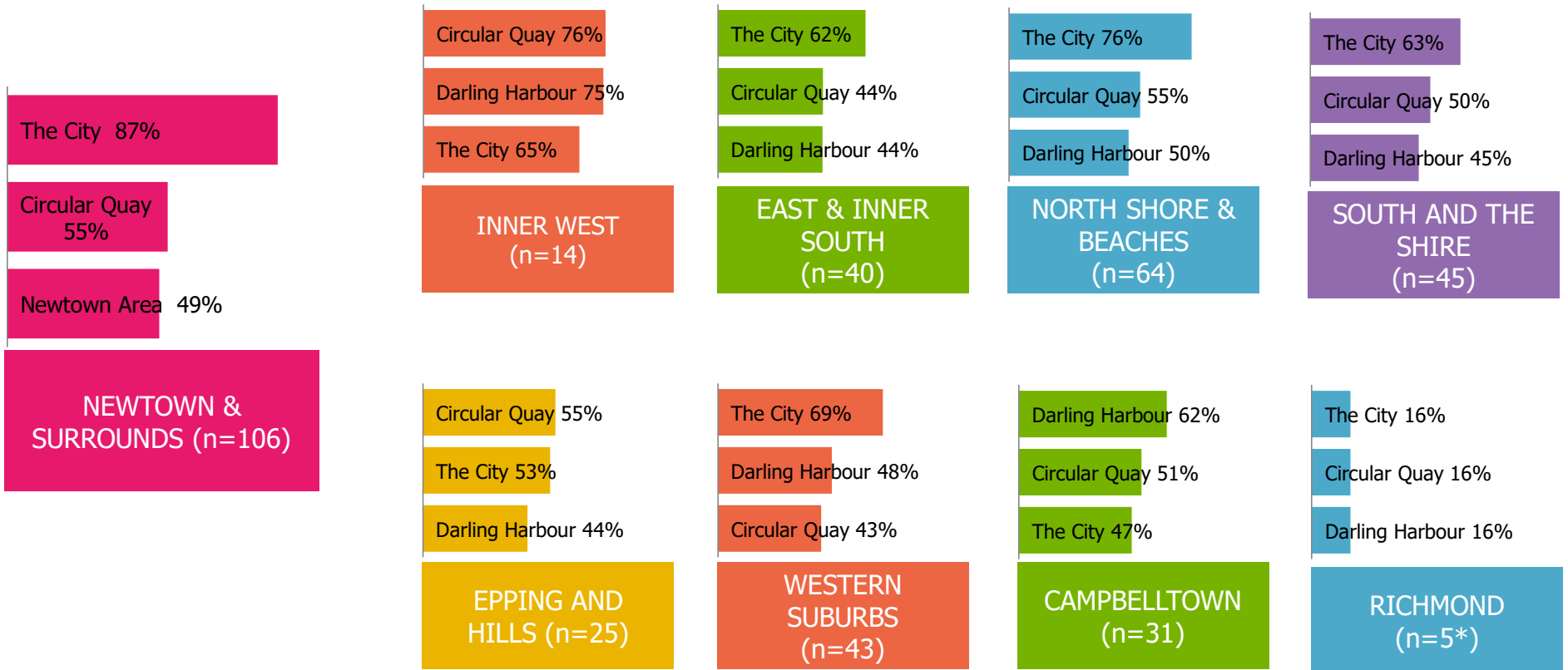
Top 3 Precincts Past 3 Months

- For Newtown residents, the top 3 destinations for leisure in the past 3 months are The City at 73% followed by Circular Quay at 55% and Darling Harbour at 34%.
- In the past 3 months, Newtown is the 3rd highest leisure visitation destination for residents of the East & Inner South at 31%.



Top 3 Precincts Next 6 Months

- For Newtown residents, the top 3 expected destinations for leisure in the next 6 months are The City at 87% followed by Circular Quay at 55% and Newtown at 49%.





Thank you

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