



The Kings Cross & Potts Point Precinct Intercept Study

**Prepared for:
The City of Sydney**

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1. Introduction

Kings Cross / Potts Point is a precinct located in inner-city Sydney, roughly 2km east of the Sydney CBD. Darlinghurst Road is the main thoroughfare through the Kings Cross / Potts Point precinct and runs from William Street in the south to Macleay Street, Potts Point to the north. The majority of the shopping and entertainment options are located along Darlinghurst Road, Bayswater Road and Victoria Street.

The City of Sydney was seeking to obtain a better understanding of the precinct and the people who use the area in order to help guide both the City of Sydney and Kings Cross / Potts Point businesses in their strategic decision making.

Information needs were based around understanding people who use the area and the businesses that service them more effectively. This entailed examining the people visiting, shopping or using the Kings Cross /Potts Point precinct via a Customer Intercept Survey which was undertaken by Woolcott Research.

This report details the finding of the Customer Intercept Survey that was conducted between the Wednesday 25th of February and Saturday the 21st of March 2015.

This report provides a profile for respondents to the Kings Cross / Potts Point survey, including;

- A demographic profiles of respondents;
- Shopping patterns including store types visited / and frequency of visitation to Kings Cross / Potts Point;
- Perceptions of the precinct;
- Suggestions for overall precinct improvement;
- Use of the competitive shopping strips and areas; and
- Frequency of eating / drinking in the area.

2. Key Messages

Respondents to Kings Cross / Potts Point survey were primarily from a young demographic with over half of daytime respondents aged under 40 (53%). During the evening this became even more apparent with a large proportion of visitors under 30 years old (46%). In addition, more than half of all respondents were living alone or in shared households (55% during the day), with most residing in by themselves or with another person (65% during the day).

Overall it can be seen that quite a large proportion of respondents frequented the area regularly. Just under half of all respondents reside locally (48% during the day, and 47% during the evenings), with the large majority walking or taking the train to get there (60% and 26% respectively during the day, and 55% and 29% respectively during the evening).

The majority of respondents were classified as 'heavy' visitors of Kings Cross / Potts Point (74% of daytime, and 64% of evening respondents). Importantly, there were no obvious barriers evident to preventing increased visitation other than proximity. Visitors to the precinct also tended to indicate that they were primarily there to fulfil a specific purpose (62%).

A typical reason for visiting the area purpose would be for a drink or a meal, and the incidence of this was observed to increase during the evening (14% during the day, 22% in the evening). The high demand for food in the area was reflected in a half of all daytime visitors being classified as 'heavy' consumer's of the Kings Cross / Potts Point food options (50% during the day, 43% during the evening).

Expense and a negative perception of the area were potential barriers cited as preventing greater use of the cafés and restaurants in the area; however these outcomes only emerged from a minority of respondents. As may be expected, the daytime respondents were less likely (than the evening ones) to have ever visited the entertainment venues (64% during the day, 76% during the evening) and there were relatively few 'heavy users' of the entertainment venues overall (~15%).

Overall the perceptions of Kings Cross / Potts Point were positive, with descriptions of the area often skewed towards its reputations as an entertainment precinct (primarily seen as lively, colourful and fun). However, negatives did emerge with top of mind descriptions including that the area was dirty, run down, sleazy and full of drugs.

In terms of potential changes, when prompted to make a suggestion both daytime and evening respondents commonly mentioned the public domain (28%). To this end the majority of evening respondents had noticed a change to the area, with it primarily being that the area has become quieter.

In terms of competition, the results suggest that the area is seen as quite unique with no clear alternative emerging. There was also no strong call from visitors to introduce any particular business or service type into the area.

3. Methodology

The Kings Cross / Potts Point Customer Intercept interviews were conducted over a four week period between the 25th of February and the 21st of March 2015. A total of n=400 daytime intercept interviews were conducted, while a further n=316 evening interviews were carried out.

Interviewing was carried out in five locations across the Kings Cross / Potts Point precinct during the daytime and evening. Loose targets for each location were implemented to ensure a representative sample of visitors across all days and times. However, flexibility was permitted to allow for the movement of interviewers away from low traffic areas during set interviewing times (depending on traffic flow).

The interviewing locations are as follows:

1. Victoria Road and Darlinghurst Road
2. Bayswater Road (Outside Hugo's)
3. Darlinghurst Road (Opposite Roslyn Street)
4. Victoria Street (Outside Joe's Café)
5. Manning Street and Macleay Street

Daytime interviewing shifts were conducted on Wednesdays and Saturdays during the interview period, and occurred between 11am and 2pm and also between 3pm and 6pm. Evening shifts took place from 6pm til 10pm on Thursdays and Saturdays.

The number of interviews planned for and collected from each interviewing location are detailed in the tables overleaf.

Table 1 – Daytime Interview Quotas

Shift	Location - Daytime					Total
	Victoria Rd and Darlinghurst Rd	Bayswater Rd (Outside Hugo's)	Darlinghurst Rd (Opposite Roslyn St)	Victoria St (Outside Joe's Café)	Manning St and Macleay St	
Wednesday Planned	40	40	40	40	40	200
Wednesday Actual	63	63	56	28	67	277
Saturday Planned	40	40	40	40	40	200
Saturday Actual	45	10	29	14	24	122
Overall Planned	80	80	80	80	80	400
Overall Actual	109	73	85	42	91	400

Table 2 – Evening Interview Quotas

Shift	Location - Evening					Total
	Victoria Rd and Darlinghurst Rd	Bayswater Rd (Outside Hugo's)	Darlinghurst Rd (Opposite Roslyn St)	Victoria St (Outside Joe's Café)	Manning St and Macleay St	
Thursday Planned	30	30	30	30	30	150
Thursday Actual	40	18	58	24	48	188
Saturday Planned	30	30	30	30	30	150
Saturday Actual	15	29	55	10	19	250
Overall Planned	60	60	60	60	60	300
Overall Actual	55	47	113	34	67	316

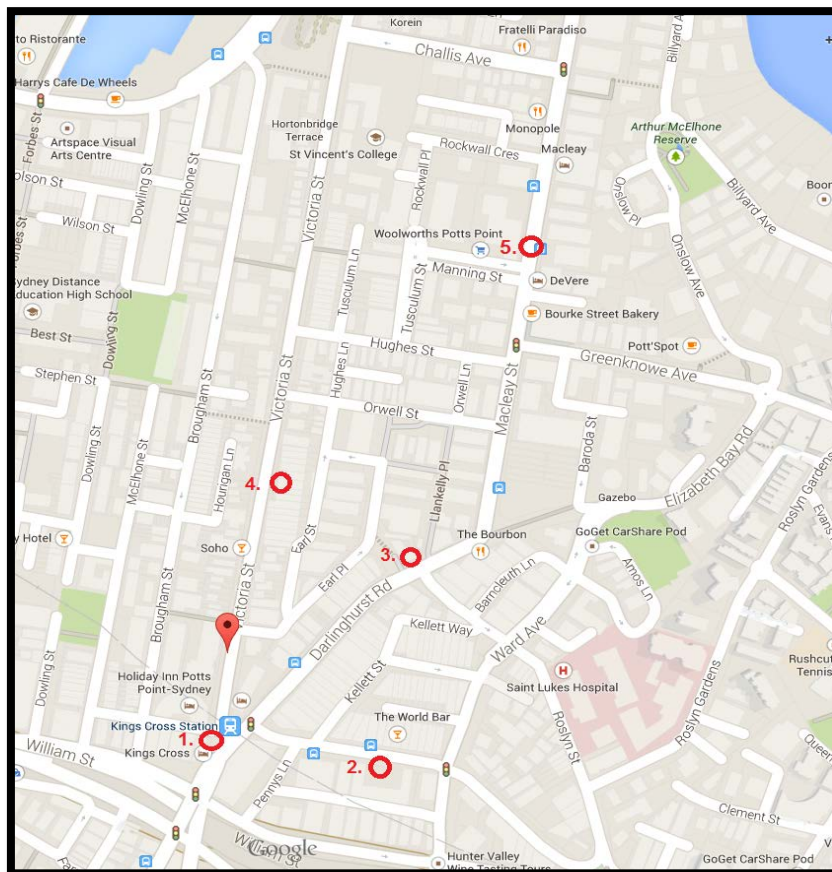
4. Description of Kings Cross / Potts Point

Kings Cross / Potts Point is one of the premier entertainment precincts in Sydney with a wide variety of bars, restaurants and entertainment venues.

Located close to the CBD and on the train line Kings Cross / Potts Point is heavily frequented particularly on the weekend.

Bars and nightclubs are primarily located on Darlinghurst Road, with restaurants typically situated in the surrounding streets leading into Potts Point.

Figure 1 - Location of Kings Cross / Potts Point and Interviewing Positions



SOURCE: MAPS.GOOGLE.COM.AU - 2015

5. Precinct Visitor Demographics

5.1 Age and Gender Profile

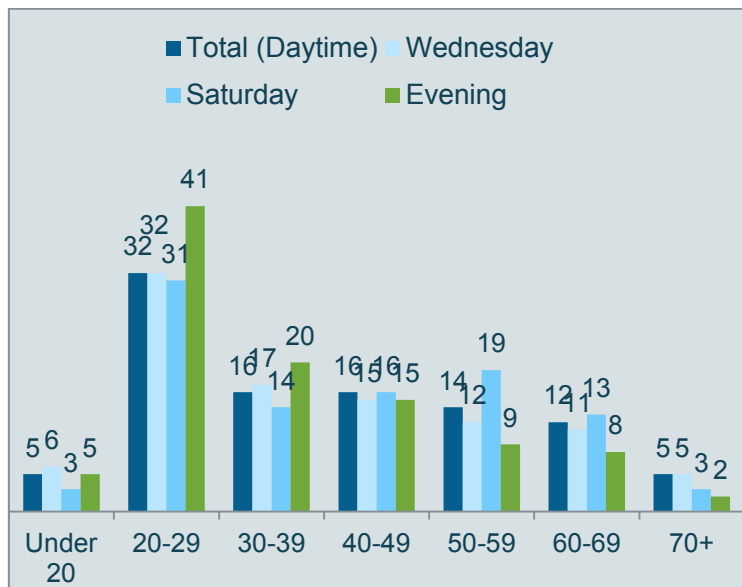
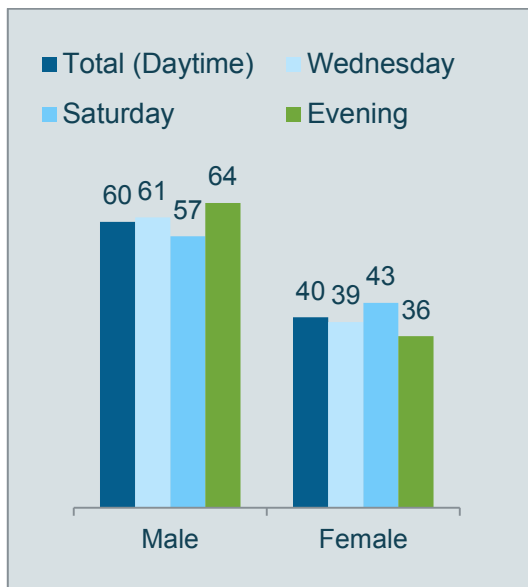
The majority of survey respondents in the Kings Cross / Potts Point precinct were male (60%), which is significant considering that males are typically less likely to participate in research of this nature. Females represented 40% of respondents during the day, with this proportion falling during the evening.

Kings Cross / Potts Point was frequented by a broad range of age groups, although 20-29 year olds made up a third of all respondents (32%) which was significantly higher than the Greater Sydney average (18%).

A main difference between daytime and evening respondents was that evenings saw a significant increase in those aged 20-39 (61%, compared to 48% for the daytime). There were no major differences between Wednesday and Saturday respondents in this regard.

Figure 2 - Age Profile

Figure 3 - Gender Profile



Q1. Into which of these age groups do you fall into?

Qx. RECORD GENDER

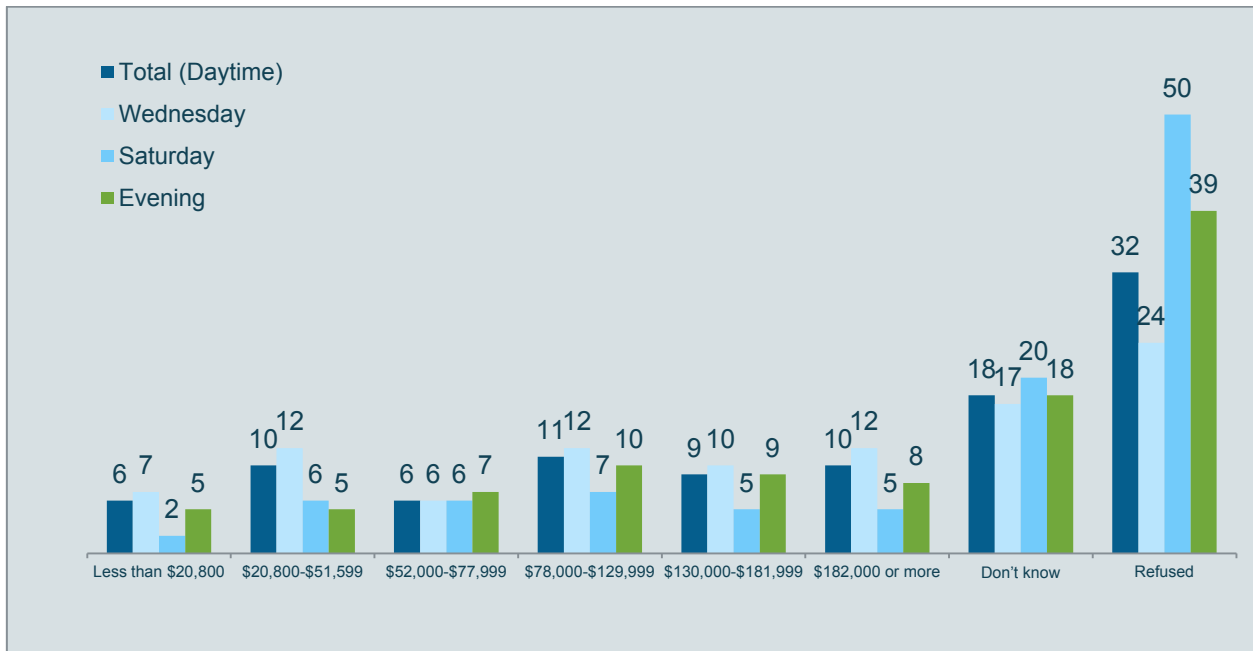
Base: All respondents: Daytime (n=400), Evening (n=316)

5.2 Household Income

It was difficult to obtain a clear picture of the respondent profile in terms of household income as a third of the survey respondents refused to offer their income, more so those that were surveyed during the week.

Of those who answered, it seemed there was a fairly even distribution across all income class intervals.

Figure 4 - Household income



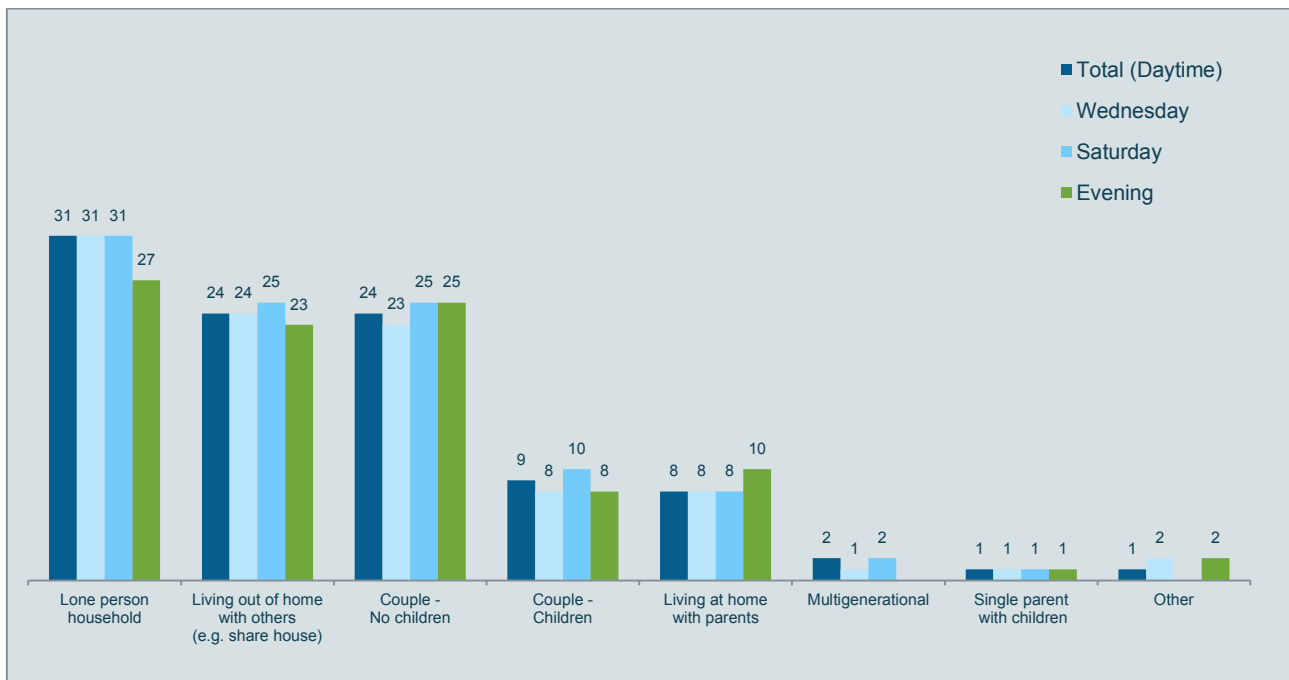
Qix. Which of these broad income categories best fits your household income before Tax?
 Base: All respondents: Daytime (n=400), Evening (n=316)

5.3 Household Structure

Respondents were asked to indicate their living situation. Almost a third of visitors to the precinct indicated that they lived alone. The high proportion of respondents living in ‘Lone Person Households’ is reflective of the City of Sydney generally (ABS statistics show Lone Person Households at 35% for the City of Sydney).

Being in a shared household, and living with a partner (no children) were also common living arrangements of respondents, with 24% of each group indicating this to be the case. Again this is in-line with the ABS statistics (which indicates that 24% of the City of Sydney residents are couples without children).

Figure 5 - Household structure



viii. Which of the following best describe the structure of the household you live in?
 Base: All respondents: Daytime (n=400), Evening (n=316)

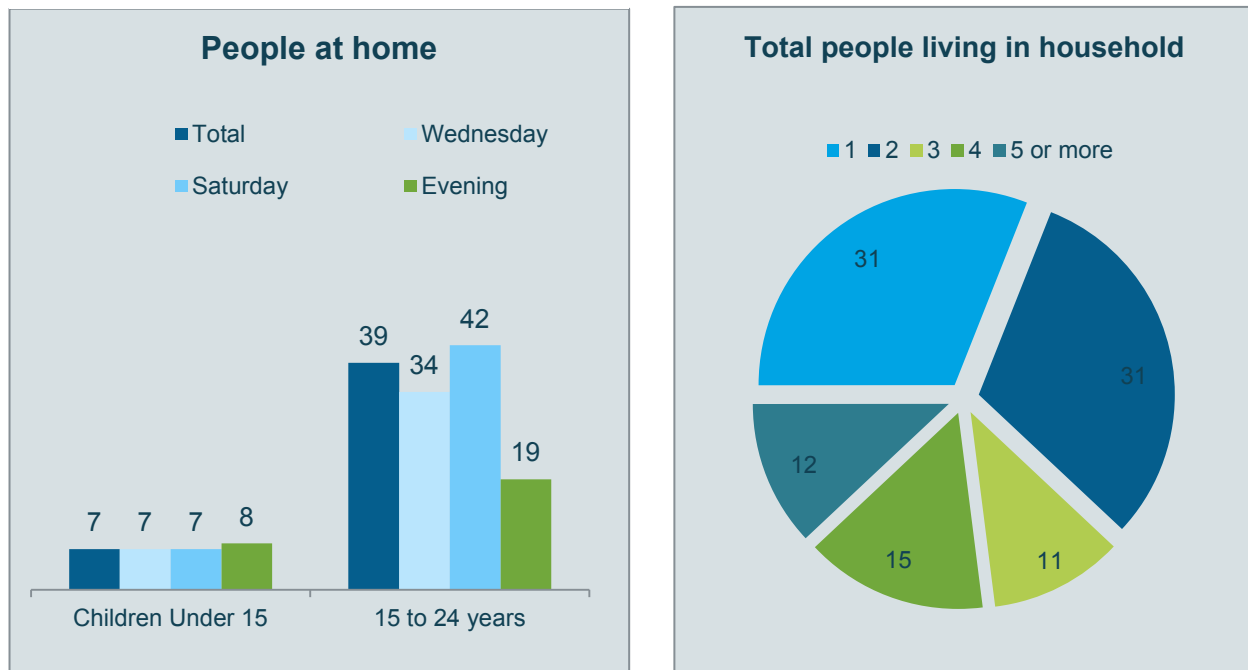
5.4 People Living within Household

Less than one in ten respondents (7%) were in households with children under 15 years old, while over a third (39%) suggested they were in households with 15 to 24 year olds.

Consistent with the household structure results, the majority of respondents were in one or two people households (62%). This figure is slightly lower than reported by the ABS for the City of Sydney as a whole (79% living in a one or two person household).

The makeup of people living in the household did not vary significantly between day and evening respondents or visitors at different days of the week.

Figure 6 - Number of people and children at home



viii. How many adults and children in each of the following age groups, live in your household, including yourself?

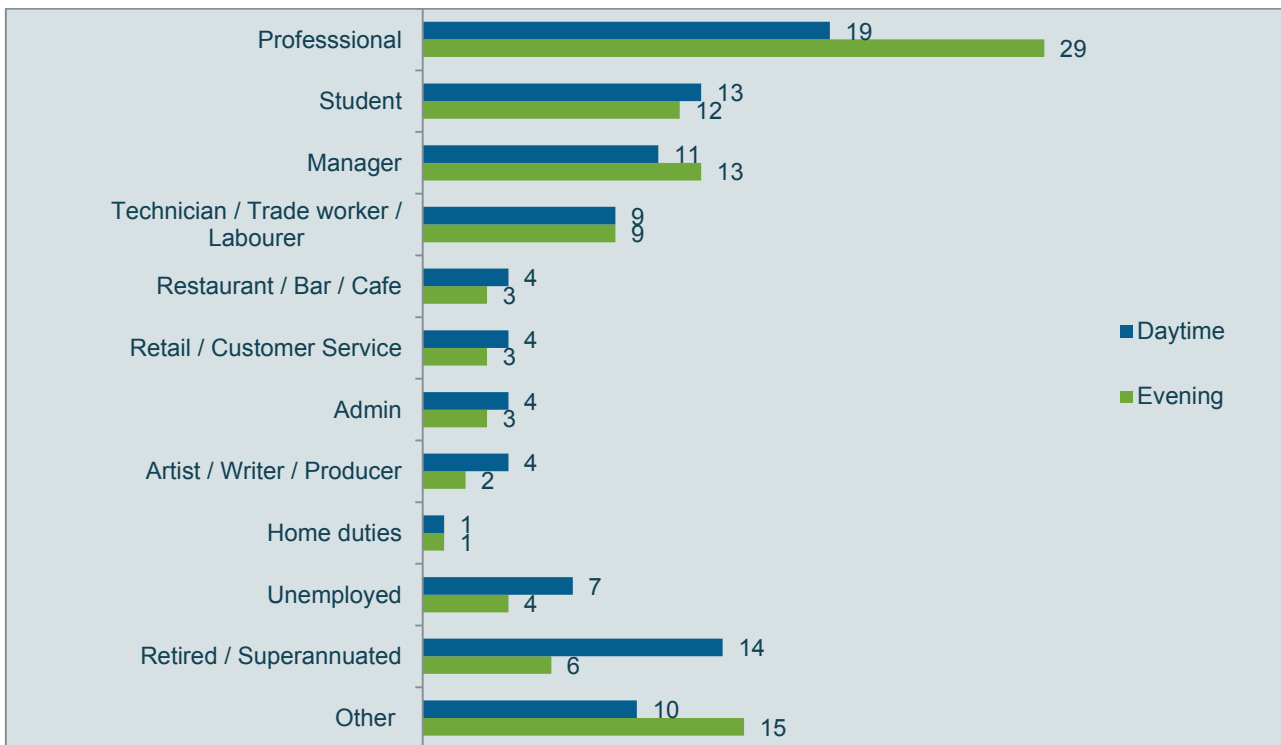
Base: All respondents who answered (n=316)

5.5 Occupation

When asked what profession people were, the most common type mentioned was ‘professional’ – as indicated by 19% of daytime and 29% of evening respondents. This difference is likely to have resulted from employed professionals being less likely to be around in the daytime due to work commitments. The evening results are closer to the ABS profile for the City of Sydney workforce, where Professionals are reported to be at 39%. (However, the ABS figure does not account for unemployed people as the intercept survey results do, so the true proportion would actually be slightly less than 39%).

The next two largest segments were ‘students’ and ‘managers’ at just over one in ten respondents for each. During the daytime, there were also a significant proportion of retired respondents (14%).

Figure 7 - Occupation

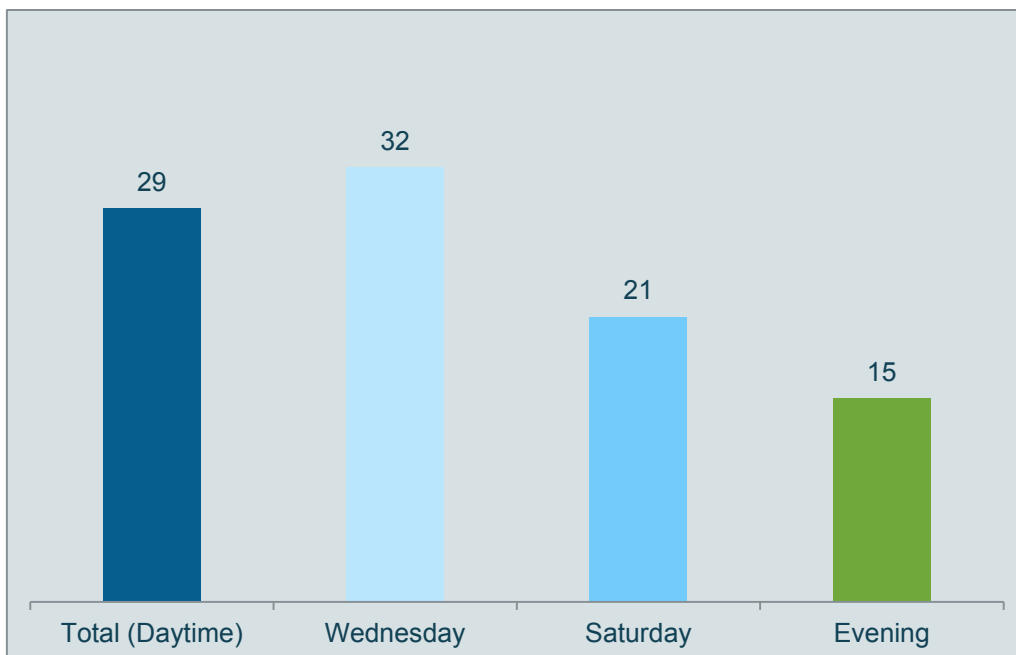


viii. Which of the following best describe the structure of the household you live in?
 Base: All respondents: Daytime (n=400), Evening (n=316)

5.6 Incidence of Working in Kings Cross / Potts Point

Almost a third of the respondents surveyed indicated that they worked in Kings Cross / Potts Point, with 29% of daytime visitors claiming that they worked in the area. This result was much higher than that recorded for the evening, where only 15% of the respondents were local workers.

Figure 8 - Incidence of working in Kings Cross / Potts Point



Qiv. Do you work in the Kings Cross/Potts Point area?
Base: All respondents: Qiv. Daytime (n=400), Evening (n=316)

6. The Kings Cross / Potts Point Visit

6.1 Place of Residence

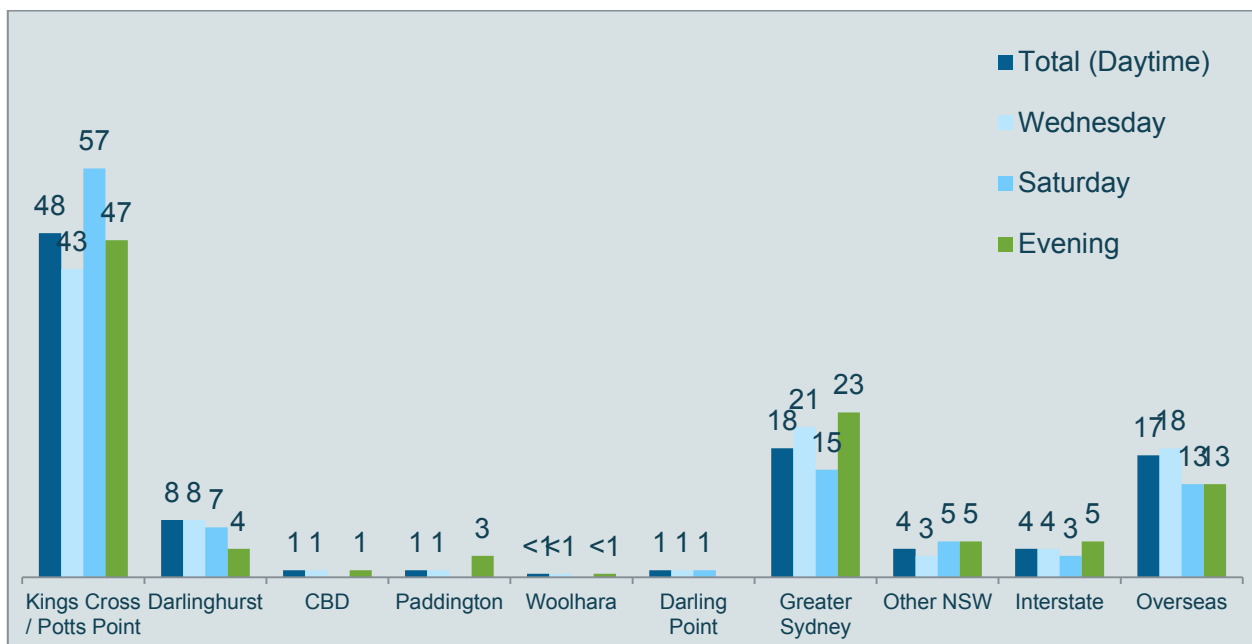
When asked for their postcode, it emerged that almost half lived locally, and around one in ten respondents were from surrounding suburbs.

The proportion from Greater Sydney was from a diverse range of locations, with the most common being the Eastern Suburbs region (6%), closely followed by Inner Sydney (5%).

Interestingly the mix of residential addresses did not vary significantly by time of day or day of week.

Almost one in five (17%) were from overseas.

Figure 9 - Place of residence



Q1. What is your residential postcode?

Base: All respondents: Daytime (n=400), Evening (n=316)

6.2 Mode of Transport Used

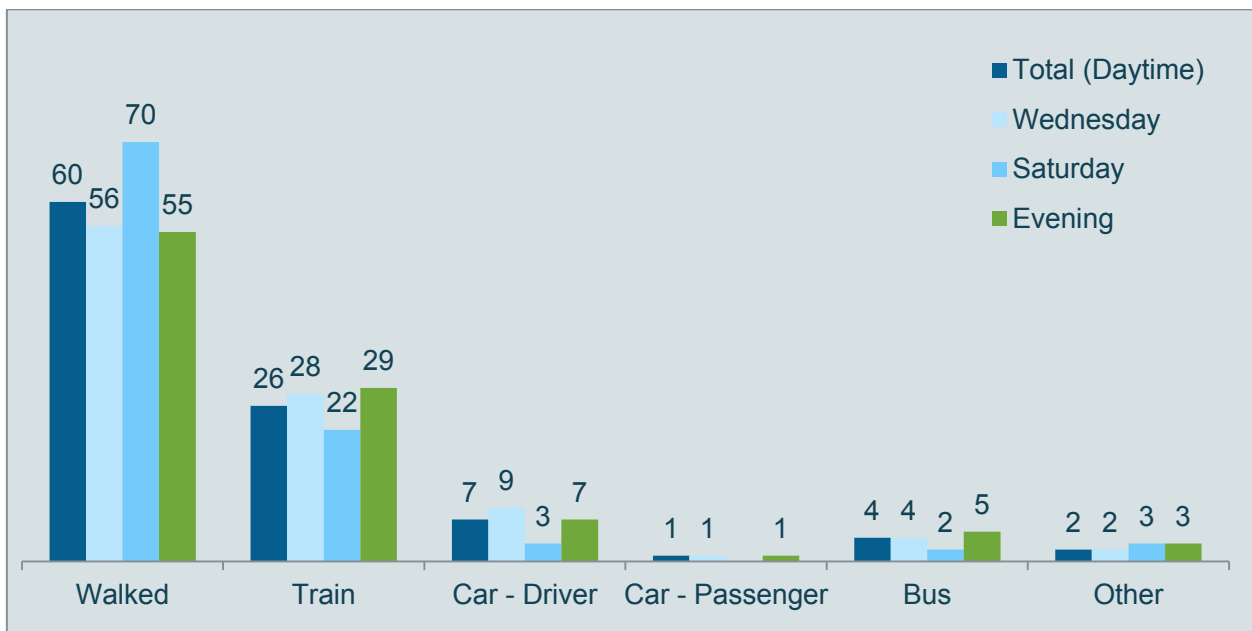
As most visitors lived in the area, it was not surprising that the majority also claimed that they had reached Kings Cross / Potts Point by foot. A quarter of visitors indicated that they travelled to the area by train, and less than one in ten visited by car (either as a driver or passenger).

However, question only permitted for a single response, so some respondents may have only selected their last mode of travel (as opposed to their main mode), which may have resulted in the slight under-representation of the proportion using public transport.

There was no significant difference by day of week or time of day, with the exception of a slightly greater proportion of respondents indicating arriving on foot on Saturday.

During the evening, respondents aged 35-49 were more likely to drive to Kings Cross / Potts Point than other age groups (14%, compared to 7% for all evening respondents). Furthermore, 17% of respondents interviewed on Bayswater Rd (Outside Hugo's) drove to Kings Cross / Potts Point.

Figure 10 - Mode of transport used



4. How did you travel to Kings Cross/Potts Point today?
 Base: All respondents: Daytime (n=400), Evening (n=316)

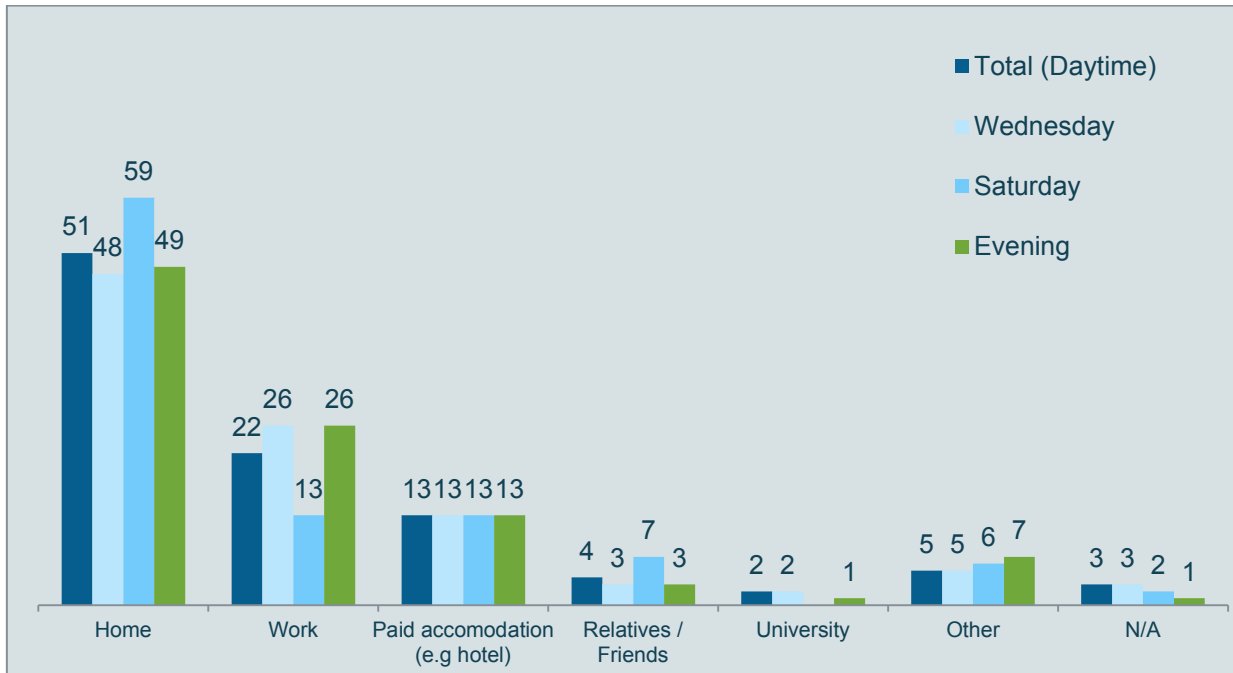
6.3 Where Visitors Travelled From

Not surprisingly, with the high proportion of people claiming to live in the area, around half (51%) also stated that they were coming from home. This pattern was slightly more typical on Saturdays (59%).

Others (22%) came to Kings Cross / Potts Point from work, and around one in ten respondents were coming from their hotel/hostel (paid accommodation) (13%).

Respondents who had travelled to Kings Cross / Potts Point from 'paid accommodation' were most likely to have been interviewed at Victoria St and Darlinghurst Rd (21% compared to 13%).

Figure 11 - Where they travelled from

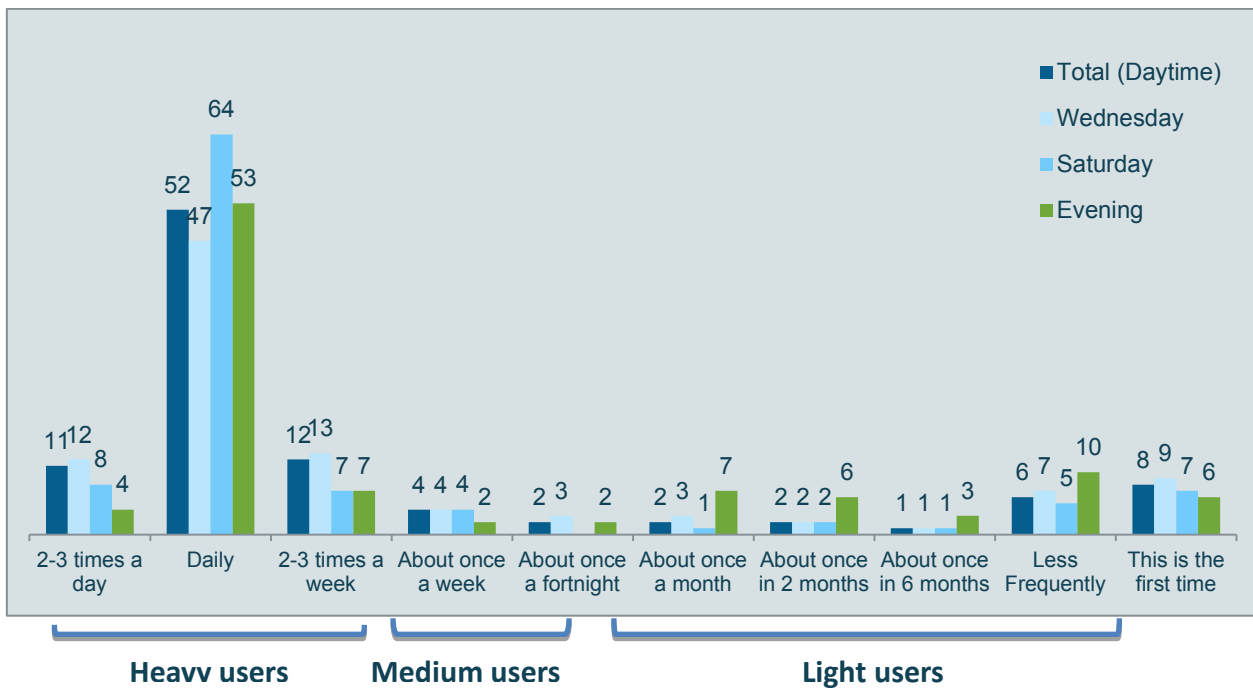


Q2. Have you come here from home, work or somewhere else?
 Base: All respondents: Daytime (n=400), Evening (n=316)

6.4 Frequency of Visitation

Again, as most visitors were local, and a high proportion worked in the area, it was not surprising that over half of the respondents claimed to visit the area on a daily basis, particularly those who were interviewed on Saturdays.

Figure 12 – Frequency of visiting Kings Cross / Potts Point

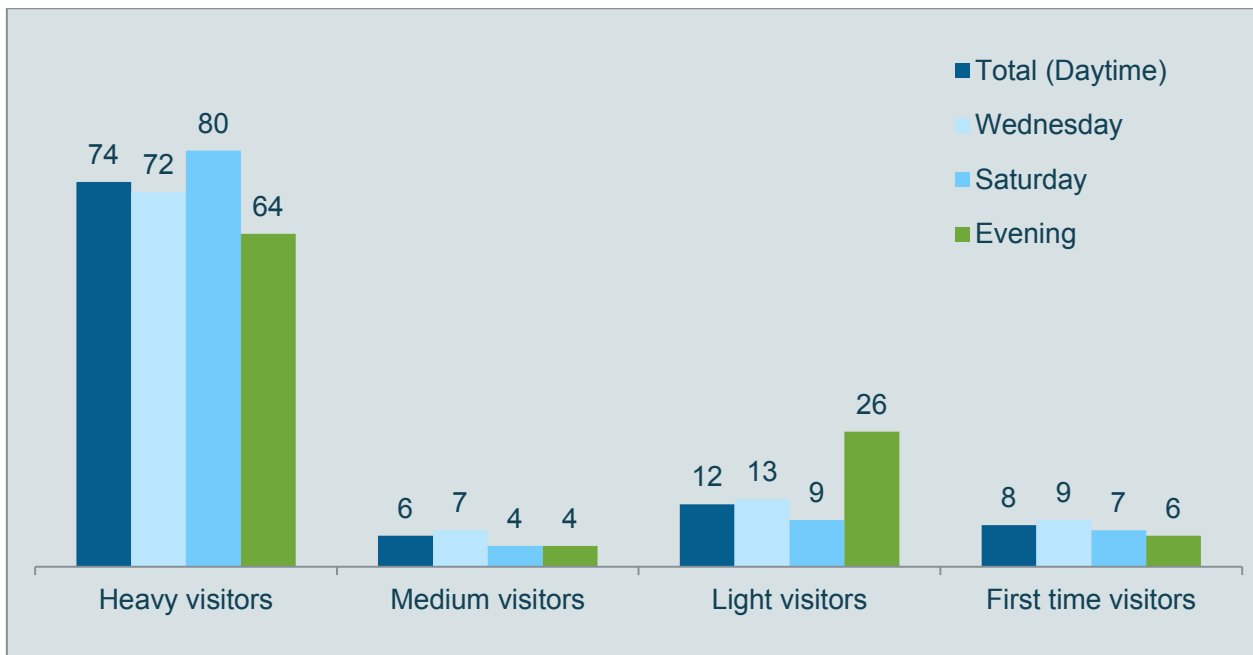


Q8. About how often do you normally visit the Kings Cross / Potts Point area generally?
 Base: All respondents: Daytime (n=400), Evening (n=316)

In summary, approximately three quarters of respondents to the Kings Cross / Potts Point survey were 'heavy visitors', of the area, with 'light visitors' being more likely during the evening (26%, vs. 12% for daytime).

Fewer than one in ten respondents were first time visitors, many who were from overseas or intra/inter-state.

Figure 13 - Frequency of Visitation Summary



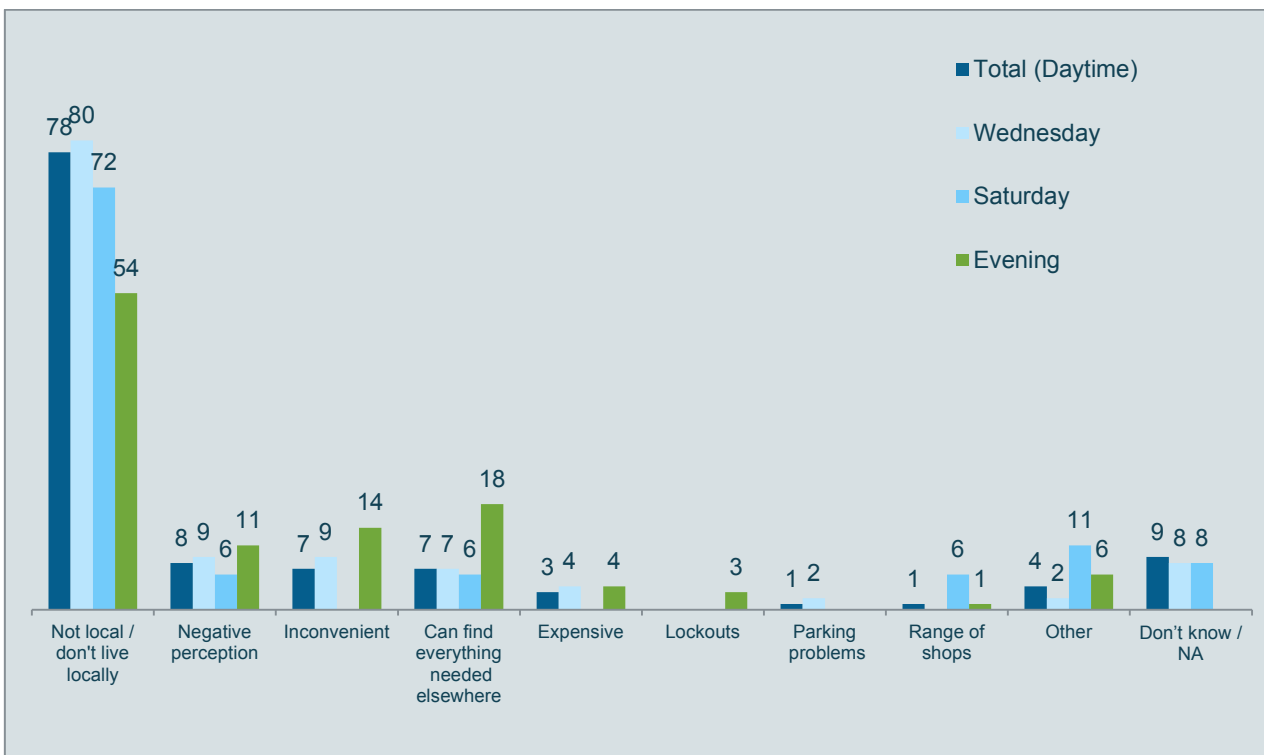
Q8. About how often do you normally visit Kings Cross?
 Base: All respondents: Daytime (n=400), Evening (n=315)

6.5 Reasons for Infrequent Visitation of Kings Cross / Potts Point

The vast majority of respondents who were not visiting regularly, indicated that the reason for their infrequent visitation was that they simply didn't live locally.

A low 8% did suggest that Kings Cross / Potts Point had negative reputation, with this comment being mentioned slightly more often by those visiting at night.

Figure 14 - Reason for infrequent visitation of Kings Cross / Potts Point



Q9. Why don't you visit Kings Cross / Potts Point more often?

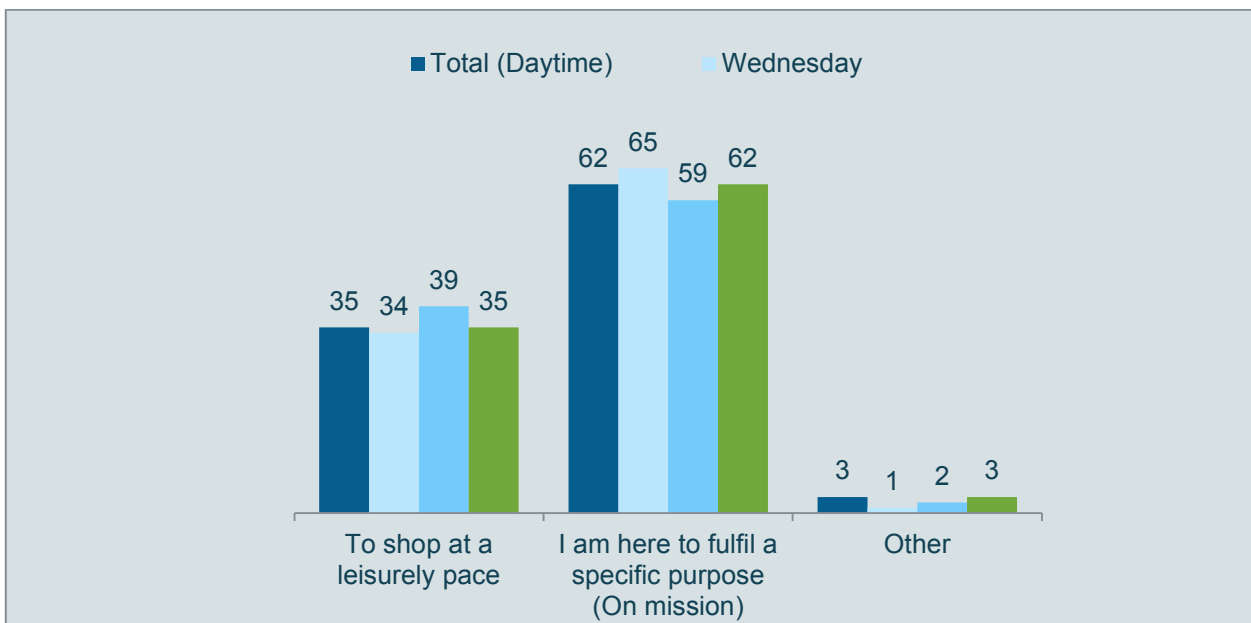
Base: Respondents who visited once a month or less: Daytime (n=73) Evening (n=94)

6.6 General Purpose of Visit

More than six in ten respondents claimed that they were visiting the area for a specific reason, while approximately one third of all respondents indicated that they were coming to Kings Cross / Potts Point to shop at a leisurely pace.

This pattern of behaviour did not vary significantly by day of week or time of day.

Figure 15 - General purpose of visit



Q3. Which of these best describes your visit to Kings Cross /Potts Point today?

Base: All respondents who answered: Daytime (n=392), Evening (n=310)

6.7 Specific Reason for Visiting

Given the relatively high proportion of locals in the sample, it is not surprising that around one in five respondents indicated that they were simply passing through the area (e.g. on their way to work or home).

14% of respondents were after a drink or meal, with this being more likely during the evenings (at 22%).

The other main reasons cited were: for work (9% daytime), to purchase top-up groceries (9% daytime), or to visit friends (8% daytime).

Table 3 - Specific reasons for visiting

Reason for visiting	Daytime n=400 %	Wednesday n=277 %	Saturday n=122 %	Evening n=316 %
Passing through (e.g. on way to work)	18	19	16	22
For a meal / snack / drink	14	13	15	22
I work here	9	12	4	5
Top up grocery / food / liquor shopping	9	9	14	9
Visiting friends / relative in Kings Cross	8	7	9	8
To browse	6	5	7	4
Live nearby / Going home	6	8	1	5
Main grocery / food / liquor shopping	5	5	5	3
As an outing	5	5	7	9
Personal Services (e.g. Hairdresser, Beauty Treatment, Spa Treatment, Sex Services)	4	3	4	<1
To visit local attractions (e.g. nightlife, architecture)	1	-	2	3
Other	17	16	19	9

Q5. What is the main reason you are visiting Kings Cross / Potts Point today?
Base: All respondents: Daytime (n=400), Evening (n=316)

6.8 All Shops and Services used

Dining (and drinking) were major activities for the precinct (47% of daytime respondents, and 43% of evening respondents).

The three supermarkets (and other convenience stores) in the survey area also resulted in 40% of respondents indicating that they had or would be shopping while on their trip.

Banking (including ATMs), was more common during daytime interviewing, while take-away food and speciality food/liquor were more common evening activities.

Female respondents typically used 'fashion / accessories / jewellery' shops and services more than males (11%, compared to 2% of male respondents).

Table 4 - Shops and services used

Shops / services visited	Daytime n=400 %	Wednesday n=277 %	Saturday n=122 %	Evening n=316 %
Café / Restaurants / Hotel	47	49	42	43
Supermarket / Convenience Store	40	40	40	34
Banks / ATM	19	19	20	15
Take away / Fast food	15	14	16	17
Speciality Food / Liquor Shop	11	10	12	16
Newsagent / Stationary / Cards / Wrap	9	9	8	4
Gym / Fitness Centre / Exercise Classes	7	7	6	4
Personal Services (e.g. Hairdresser, Beauty Treatment, Spa Treatment, Sex Services)	6	6	5	1
Retail Services (e.g. Repairs, Dry Cleaning, Post Office)	6	6	5	2
Fashion (clothes and shoes) / accessories / jewellery	6	4	9	1
Chemist / Health / Beauty products	6	5	5	3
Local nightlife	5	5	5	8
Other	19	19	19	6
None / Don't know	12	11	13	8

Q6. Which shops and services have you used / will use today in Kings Cross / Potts Point? **MULTIPLE RESPONSE**
Base: All respondents: Daytime (n=400), Evening (n=316)

6.9 Crossover between Shops and Services

Daytime

During the day two thirds of people who visited a Bank / ATM also visited a Café / Restaurant / Hotel (66%), with almost half also using a Supermarket / Convenience store (47%) during their trip to Kings Cross / Potts Point.

Visitors who were in the precinct and using a of Gym / Fitness Centre / Exercise Classes were likely to also visit as Supermarket / Convenience store (64%) as part of their trip as well as go to Café / Restaurant / Hotel while they are in the precinct (45%).

Table 5 - Crossover between Shops and Services - Daytime

	Café / Restaurants / Hotel	Supermarket / Convenience Store	Banks / ATM	Take away / Fast food	Speciality Food / Liquor Shop	Newsagent / Stationary / Cards / Wrap	Gym / Fitness Centre / Exercise Classes
Café / Restaurants / Hotel	100	45	66	46	50	41	45
Supermarket / Convenience Store	39	100	47	31	52	41	64
Banks / ATM	27	22	100	15	19	25	27
Take away / Fast food	13	15	20	100	15	17	14
Speciality Food / Liquor Shop	11	14	16	15	100	9	14
Newsagent / Stationary / Cards / Wrap	10	12	22	10	7	100	18
Gym / Fitness Centre / Exercise Classes	7	9	11	8	7	9	100

Q6. Which shops and services have you used / will use today in Kings Cross?

Base: All respondents: Daytime (n=400)

NOTE: CHART IS INTENDED TO BE READ IN COLUMNS

Evening

The evening saw a slightly different crossover between the shops and services visited in the Kings Cross / Potts Point precinct, with Newsagents very commonly used in association with both Café / Restaurants / Hotels (69%) and Supermarkets / Conveniences stores (54%).

Use of Banks / ATM's had a strong correlation with Café / Restaurants / Hotels (59%) as well as Supermarkets / Conveniences stores (54%).

'Local nightlife' had much lower levels of crossover than other shops and services - which may indicate people who visit for the nightlife are there for that sole purpose and don't typically use other shops and services.

Table 6 - Crossover between Shops and Services – Evening

	Café / Restaurants / Hotel	Supermarket / Convenience Store	Take away / Fast food	Speciality Food / Liquor Shop	Banks / ATM	Local nightlife	Newsagent / Stationary / Cards / Wrap
Café / Restaurants / Hotel	100	37	45	41	59	31	69
Supermarket / Convenience Store	29	100	38	41	54	8	54
Take away / Fast food	18	19	100	12	22	15	23
Speciality Food / Liquor Shop	15	20	11	100	20	8	31
Banks / ATM	20	24	19	18	100	15	46
Local nightlife	7	7	6	4	9	100	-
Newsagent / Stationary / Cards / Wrap	7	7	6	8	13	-	100

Q6. Which shops and services have you used / will use today in Kings Cross?

Base: All respondents: Evening (n=316)

NOTE: CHART IS INTENDED TO BE READ IN COLUMN

7. Perceptions of Kings Cross /Potts Point and Suggested Improvements

7.1 Descriptions of Kings Cross / Potts Point – Daytime

During the day Kings Cross / Potts Point was primarily described as ‘Vibrant / Lively / Alive and Busy’ (28%) with this highest amongst light and first time users (31% and 37% respectively). This suggests that the entertainment aspects of the area were dominating visitor’s thoughts.

Around one in five described the area as ‘Mixed / Diverse / Eclectic / Colourful’ (19%) with this fairly consistent across all user types.

A smaller proportion of respondents described Kings Cross as ‘Filthy / Dirty / Messy’ (10%) with this more prominent amongst medium and light users of the area (17% and 16% respectively).

Table 7 - Most popular descriptions of Kings Cross / Potts Point – Daytime (User type)

	Total n=400 %	Heavy user n=293 %	Medium user n=24 %	Light user n=45 %	First Time n=32 %
Vibrant / Lively / Alive / Busy	28	29	12	31	37
Mixed / Diverse / Eclectic / Colourful	19	19	17	16	19
Great / Fun / Friendly / Nice	17	18	25	13	6
Interesting / Different / Unique	14	16	13	7	9
Filthy / Dirty / Messy	10	9	17	16	9
Run down / Dying / Empty shops / Sad	6	6	13	7	3
Sleazy / Seedy	5	3	8	13	9
Drugs	4	4	-	5	-
Improved / Getting better	3	3	8	-	-
Loud	3	3	-	2	-

Q15. What descriptive words would you use to describe Kings Cross?
Base: Respondents who visited once a month or less (n=400)

Location of interviews also had an effect on how respondents described Kings Cross / Potts Point. Respondents from Manning and Macleay St were more likely to describe the area as ‘Great / Fun / Friendly / Nice’ (24%).

However, respondents surveyed at Darlinghurst Rd were the most likely to describe the area as ‘Filthy / Dirty / Messy’ (17%), and ‘Run down / Dying / Empty shops / Sad’ (14%).

Table 8 - Most popular descriptions of Kings Cross / Potts Point – Daytime (Location)

	Total n=400 %	Victoria & D’hurst Rd n=108 %	Bayswater Rd n=71 %	D’hurst Rd n=41 %	Victoria St n=41 %	Manning & Macleay St n=90 %
Vibrant / Lively / Alive / Busy	28	30	28	32	26	23
Mixed / Diverse / Eclectic / Colourful	19	15	18	22	17	20
Great / Fun / Friendly / Nice	17	12	16	16	21	24
Interesting / Different / Unique	14	17	12	9	17	14
Filthy / Dirty / Messy	10	10	16	17	2	2
Run down / Dying / Empty shops / Sad	6	7	8	14	2	-
Sleazy / Seedy	5	6	6	4	2	6
Drugs	4	6	1	4	5	2
Improved / Getting better	3	4	1	4	-	3
Loud	3	2	4	1	10	-

Q15. What descriptive words would you use to describe Kings Cross?
Base: Respondents who visited once a month or less (n=400)

NOTE: The dotted line used in the charts above is there to highlight responses greater than 10% (amongst the total sample). This is typically what is looked for with open-ended questions of this nature to indicate that a certain response has come through with a degree of consistency.

7.2 Descriptions of Kings Cross / Potts Point – Evening

Kings Cross / Potts Point during the evening was again described as ‘Vibrant / Lively / Alive / Busy’ (29%) particularly by light users and first time visitors (35% and 39% respectively).

It was also common for respondents to describe the precincts as ‘Great / Fun / Friendly / Nice’ (19%) with this highest amongst heavy users (21%).

Interestingly the negative perceptions of Kings Cross / Potts Point were somewhat less prominent during the evening.

Table 9 - Descriptions of Kings Cross / Potts Point – Evening (User type)

	Total n=316 %	Heavy user n=202 %	Medium user n=13 %	Light user n=82 %	First Time* n=18 %
Vibrant / Lively / Alive / Busy	29	27	23	35	39
Great / Fun / Friendly / Nice	19	21	8	17	11
Interesting / Different / Unique	12	10	8	17	6
Mixed / Diverse / Eclectic / Colourful	11	13	8	9	6
Filthy / Dirty / Dump	11	9	23	15	17
Party / Nightlife / Entertaining	8	9	8	7	6
Weird / Scary / Crazy / Rough	7	6	15	7	-
Run down / Dying / Empty shops / Sad	6	7	-	5	6
Sleazy / Seedy	6	4	-	12	-

Q15. What descriptive words would you use to describe Kings Cross?
Base: Respondents who answered (n=316)

During the evening respondents who were surveyed at Manning and Macleay St were the most likely to describe the Kings Cross / Potts Point area as ‘Vibrant / Lively / Alive / Busy’ (44%).

Respondents surveyed on Victoria and Darlinghurst Rd were the most likely to describe the area as ‘Interesting / Different / Unique’ (25%) as well as ‘Filthy / Dirty / Dump’ (18%).

Table 9 - Descriptions of Kings Cross / Potts Point – Evening (User type)

	Total n=316 %	Victoria & D’hurst Rd n=55 %	Bayswater Rd n=47 %	D’hurst Rd n=113 %	Victoria St n=34 %	Manning & Macleay St n=67 %
Vibrant / Lively / Alive / Busy	29	16	24	32	21	44
Great / Fun / Friendly / Nice	19	17	12	12	26	26
Interesting / Different / Unique	12	25	12	8	12	5
Mixed / Diverse / Eclectic / Colourful	11	-	6	3	15	17
Filthy / Dirty / Dump	11	18	8	14	7	7
Party / Nightlife / Entertaining	8	15	6	9	9	2
Weird / Scary / Crazy / Rough	7	16	4	4	9	4
Run down / Dying / Empty shops / Sad	6	7	4	7	3	3
Sleazy / Seedy	6	9	2	5	3	7

Q15. What descriptive words would you use to describe Kings Cross?
Base: Respondents who answered (n=316)

7.3 Suggestions to Improve Kings Cross / Potts Point

Daytime

Survey respondents were prompted to suggest ways to improve the area to encourage greater visitation, and the most common suggestions to emerge amongst the daytime respondents in Kings Cross / Potts Pott were based around the public domain (28%). Daytime respondents were also likely to indicate they wanted the area to be cleaned up (14%).

There were also calls for better transport options to be provided in Kings Cross / Potts Point (12%) e.g. ‘Better / cheaper / more parking’ and ‘More / better public transport’.

Table 9 - Suggestions to improve Kings Cross / Potts Point – Daytime

Suggestions	n=400 %	Suggestions	n=400 %
Public Domain <ul style="list-style-type: none"> Less drunks / homeless / junkies (13%) Less sleazy stuff (11%) 	24	Improve the look of Kings Cross/Potts Point <ul style="list-style-type: none"> Buildings need fixing up / restoration (4%) Fix the footpaths (1%) Sports ground / park / open space (1%) Make it more pedestrian friendly (1%) 	7
Clean up the area <ul style="list-style-type: none"> Cleaner streets / smarten up a bit (14%) 	14	Change Kings Cross/Potts Point' reputation <ul style="list-style-type: none"> Less backpackers (2%) More family based activities (1%) Less police (1%) 	4
Better transport options <ul style="list-style-type: none"> Better / cheaper / more parking (6%) More / better public transport (4%) Reduce traffic (1%) Bike paths / no bikes on footpaths (1%) 	12	More normal stores / support for local business <ul style="list-style-type: none"> More normal shops (2%) Lower rent for restaurants / shops (2%) 	4
Removal / Reduction of lock out laws <ul style="list-style-type: none"> Get rid of / Ease up on lock out rules (12%) 	12	Safety <ul style="list-style-type: none"> More police (4%) 	4
More cultural events <ul style="list-style-type: none"> Theatre / live music / entertainment (3%) Some type of event / cultural event (2%) Street theatre / allow buskers (1%) Street fairs (1%) Art gallery (1%) 	8	More restaurants / bars / food <ul style="list-style-type: none"> More pubs / bars (1%) More food places, lunch and dinner (1%) 	2
		Keep the lock out laws	2
		Other	17
		Don't know / NA	8

Q14. What changes to this area can you suggest that would encourage you to shop or visit Kings Cross more often?

Base: Daytime Respondents (n=400)

Evening

The suggestions amongst evening respondents followed a similar theme with close to a third of evening respondents mentioning aspects of the public domain as a suggestion that would encourage them to shop or visit the Kings Cross / Potts Point precinct (21%).

However there was more of an emphasis on the entertainment aspect of Kings Cross / Potts Point during the evening, with more suggestions for the removal and /or reduction of the restrictions imposed by the existing lock out laws (17%). Some respondents also wanted the streets to be cleaned / smartened up (11%).

Table 1 Suggestions to improve Kings Cross / Potts Point – Evening

Suggestions	n=316 %	Suggestions	n=316 %
Public Domain • Less drunks / homeless / junkies (13%) • Less sleazy stuff (7%) • Get rid of injecting room (1%)	21	Change Kings Cross/Potts Point' reputation • Get a village feel / arty / café culture (2%) • Change it all (1%) • Change reputation / stigma (1%) • Less backpackers (1%)	5
Removal / Reduction of lock out laws • Get rid of / Ease up on lock out rules (17%)	17	Improve the look of Kings Cross/Potts Point • Parks (1%) • Buildings need fixing up / restoration (1%) • Public toilets / more noticeable (1%) • Smokers pits (1%) • Wider / better streets (1%)	5
Clean up the area • Cleaner streets / smarten up a bit (11%)	11	More normal stores • More normal shops / less restaurants, nick-nack stuff (4%)	4
More restaurants / bars / food • More bars / cafes etc. with outdoor seating (3%) • More pubs / bars (3%) • More food places, lunch and dinner (3%)	9	Support for the lock out laws • Keep the lock out (3%)	3
Better transport options • Better / cheaper / more parking (3%) • More / better public transport (3%) • Reduce traffic (1%)	7	Other	8
Safety • More police (5%) • Less crime (1%)	6	Nothing / keep it how its is	7
More cultural events • Theatre / live music / entertainment (4%) • Some type of event / cultural event (1%)	5	Don't know / NA	19

Q14. What changes to this area can you suggest that would encourage you to shop or visit Kings Cross more often?

Base: Daytime Respondents (n=316)

7.4 Other Shops and Services Needed

Daytime

Again, despite prompting for suggestions, there were no particular shops or services to emerge with any real degree of consistency (all were below the 10% level). However, amongst the suggestions that did emerge, the most common were for ‘clothes / shoe shop’ (9%), and cafes (6%).

Even so, the highest proportion of daytime responses was for ‘Nothing’ (13%).

Evening

The greatest difference between the daytime and the evening responses was in the more prominent mention of the need for ‘More bars/pubs’ during the evenings (7%).

Again, however, the ‘Nothing’ response was the most common amongst these respondents (11%).

Table 11 - Other shops and services need

Shops and services	Daytime n=312 %	Evening n=238 %	Shops and services	Daytime n=312 %	Evening n=238 %
Clothes / shoe shop	9	9	Live music / more night time activity	2	3
Cafés	6	5	Normal shops for people who live there	2	2
Hardware store	4	3	Community centre	2	1
Supermarket (Coles, Woolworths etc.)	4	3	A bookstore / stationary store / newsagent	2	1
More bars / pubs	3	7	Get rid of brothels / sex shops	2	1
Parking	3	2	A bigger range of food stores	2	-
More shops / more interesting shops	3	-	Restaurants	-	5
Fruit and veg shops	3	3	Fast food / McDonalds	2	2
An electronic communications store	3	2	Other	11	21
A park / larger / sports park	3	1	Nothing	13	11
			Don't know / NA	17	18

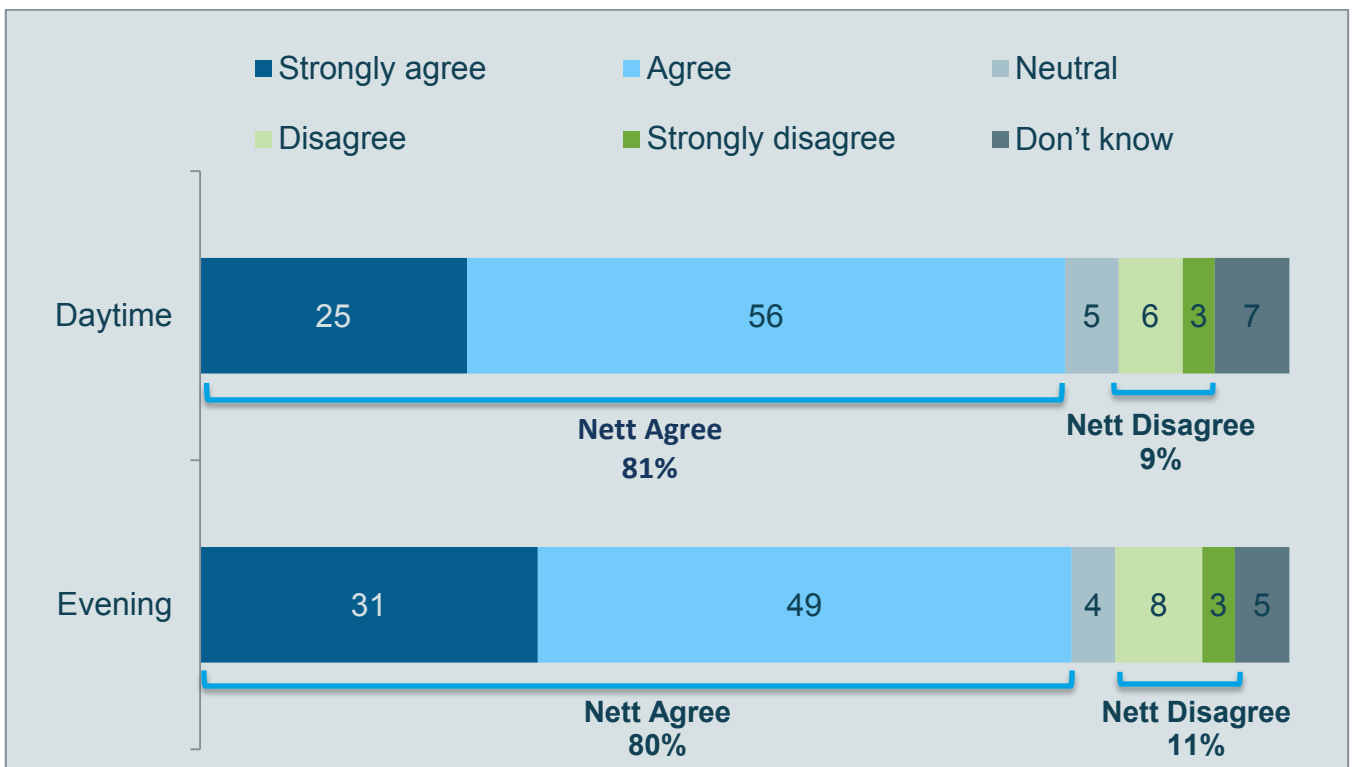
Q7. What other types of shops or services does this area need?
Base: All Respondents (n=413)

7.5 Adequacy of Public Transport

During the day four out of five respondents considered the public transport to Kings Cross / Potts Point to be adequate to their needs (81%), with a small proportion disagreeing (9%).

There was minimal difference for the evening results, however, there was a marginally lower proportion of agreement (80%) and more disagreeing (11%).

Figure 16 - Adequacy of Public Transport



Q13. Do you agree or disagree that there is adequate public transport to and from Kings Cross?
 Base: All Respondents who answered: Daytime (n=400) Evening (n=316)

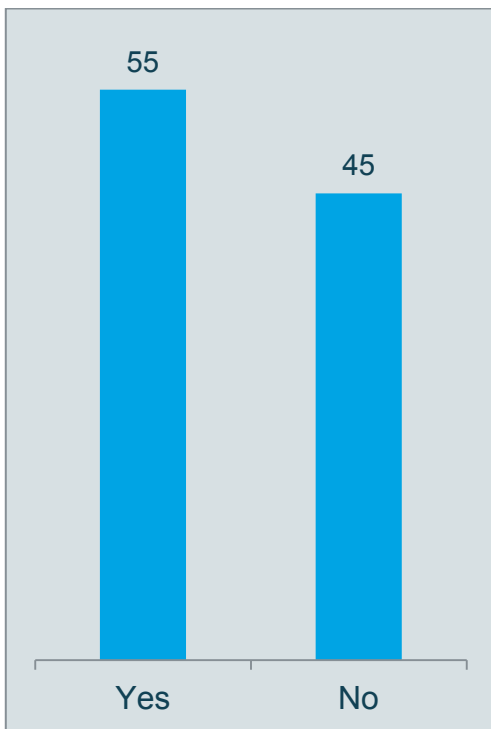
7.6 Changes in the Last 12 Months

The majority of respondents had noticed changes to the Kings Cross / Potts Point area in the last 12 months (55%). The most noticeable change being that the area was now quieter, with less people around (41% of those who had noticed a difference).

Once again the lock out laws emerged here in terms of both negative and positive outcomes.

Figure 17 – Observed a change in the last 12 months

Table 12 – Changes observed



Changes	Total N=165 %
Quieter / less people / foot traffic / not as busy	41
Impact of lockout laws / lockout	21
Less dodgy people / junkies / drunk people / prostitutes	10
Closing down shops / affecting business	10
Safer	8
Its died / less lively / not as crazy	8
Gentrified / more middle upper class / sophisticated	5
Cleaned up a bit / tidier / more organised	5
Killed the vibe /lacks atmosphere / less sociable	5

Q14a. Do you feel Kings Cross / Potts Point has changed in the last 12 months?

Q14b. How has it changed?

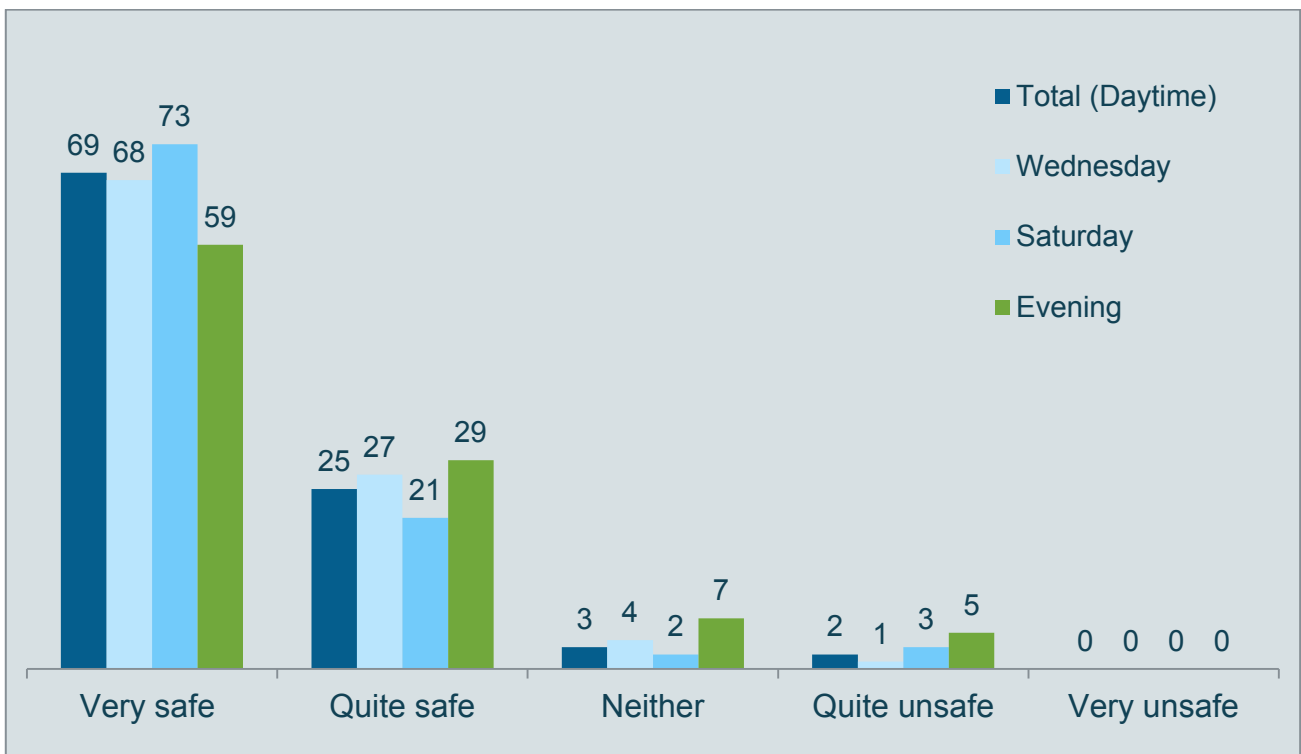
Base: Q14a. All respondents: Evening (n=316), Q14b. Respondents who noticed a change (n=165)

7.7 Perception of Safety in the Kings Cross / Potts Point Precinct

The perception of safety was quite high in Kings Cross / Potts Point, with almost all respondents indicating that they feel safe in the area. Not surprisingly respondents felt safest during the daytime (94%) with minimal difference between day of week.

The evening saw a small reduction in perceived safety, with slightly less people feeling ‘very safe’ and more feeling ‘Quite safe, while overall just under nine out of ten people felt safe in Kings Cross / Potts Point during the evening (88%).

Figure 18 – Perception of feeling safe in the Kings Cross / Potts Point precinct



Q15/16. What changes to this area can you suggest that would encourage you to shop or visit Kings Cross / Potts Point more often?
 Base: All respondents: Daytime (n=400), Evening (n=316)

8. Other Shopping Precincts

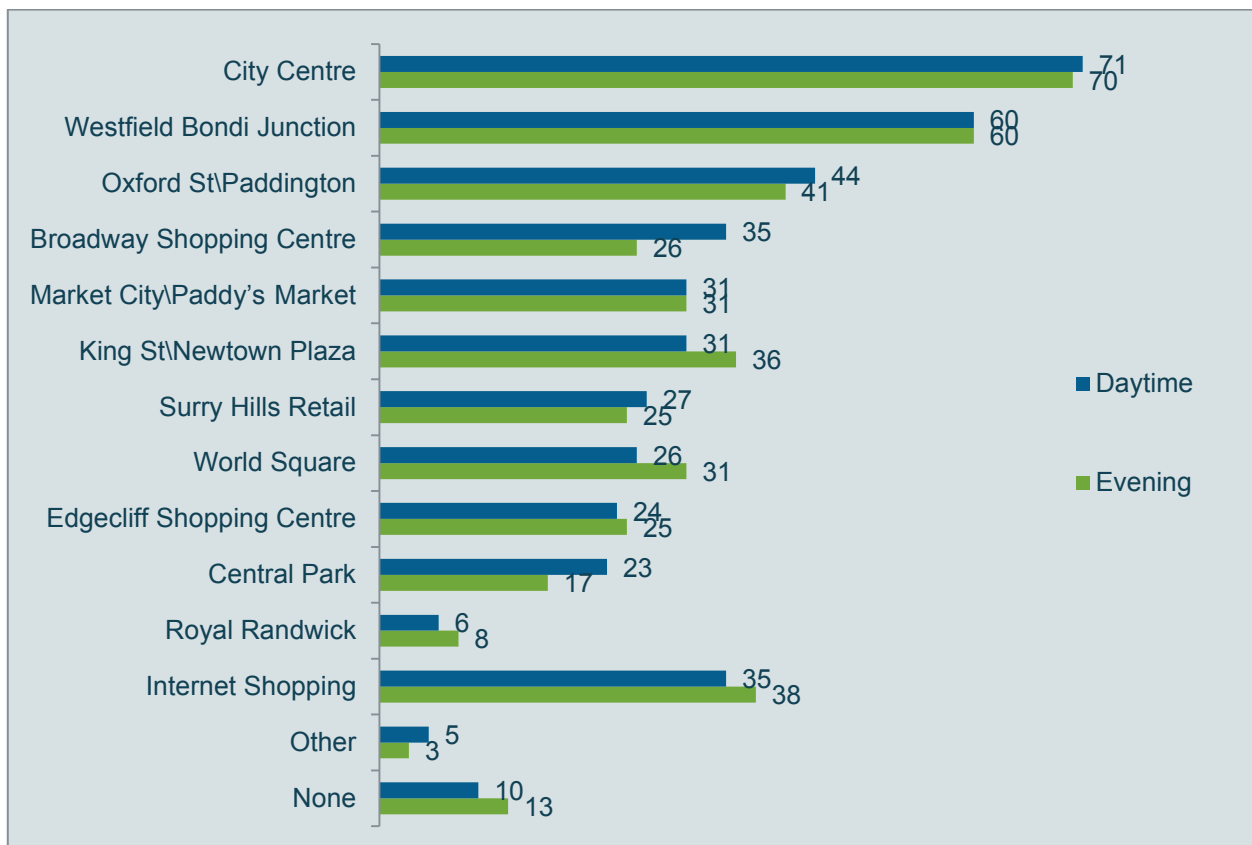
8.1 Other Shopping Precincts that Visitors Shop at

The City Centre (70%-71%) and Westfield Bondi Junction (60%) were the centres most commonly used by both daytime and evening respondents.

Nearby Oxford Street and Paddington also featured with many visitors having shopped there previously (44% daytime, 41% evening).

Internet Shopping also featured prominently amongst visitors to the Kings Cross / Potts Point precinct (35% daytime, and 38% evening).

Figure 19 – Other Shopping Precincts that Visitors Shop At



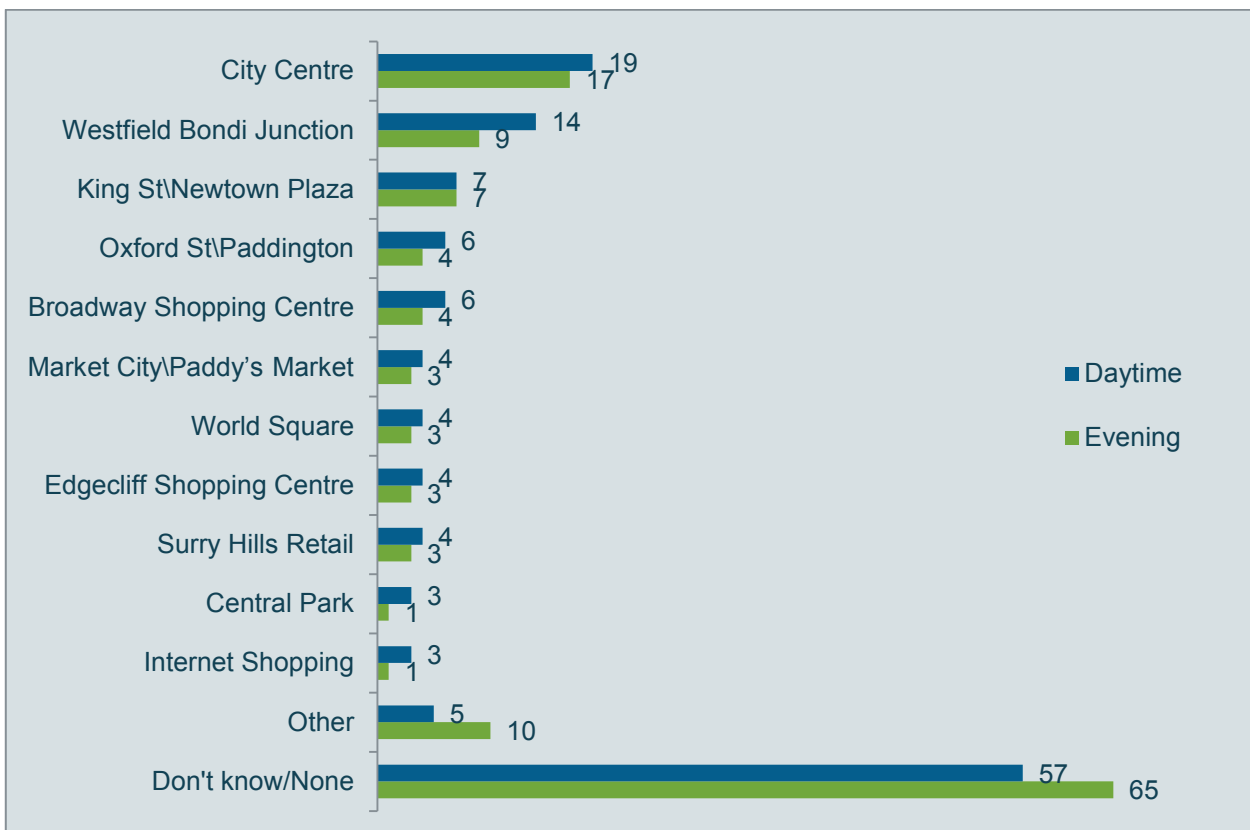
Q16/17c. Where else would you shop for the types of things you purchased or will purchase today in Kings Cross?
 Base: All respondents: Daytime (n=400), Evening (n=316)

8.2 Other Areas for Products and Services Available in Kings Cross / Potts Point

In terms of alternatives for the goods and services in Kings Cross / Potts Point, again the City Centre (19%) and Westfield Bondi Junction (14%) were the most commonly mentioned.

However, the majority of respondents were unable to nominate an alternative (57% daytime, and 65% evening), suggesting that the area is quite unique in this regard.

Figure 20 - Other Areas for Products and Services Available in Kings Cross / Potts Point



Q16/17c. Where else would you shop for the types of things you purchased or will purchase today in Kings Cross?
 Base: All respondents: Daytime (n=400), Evening (n=316)

9. Kings Cross / Potts Point Eateries and Entertainment Venues

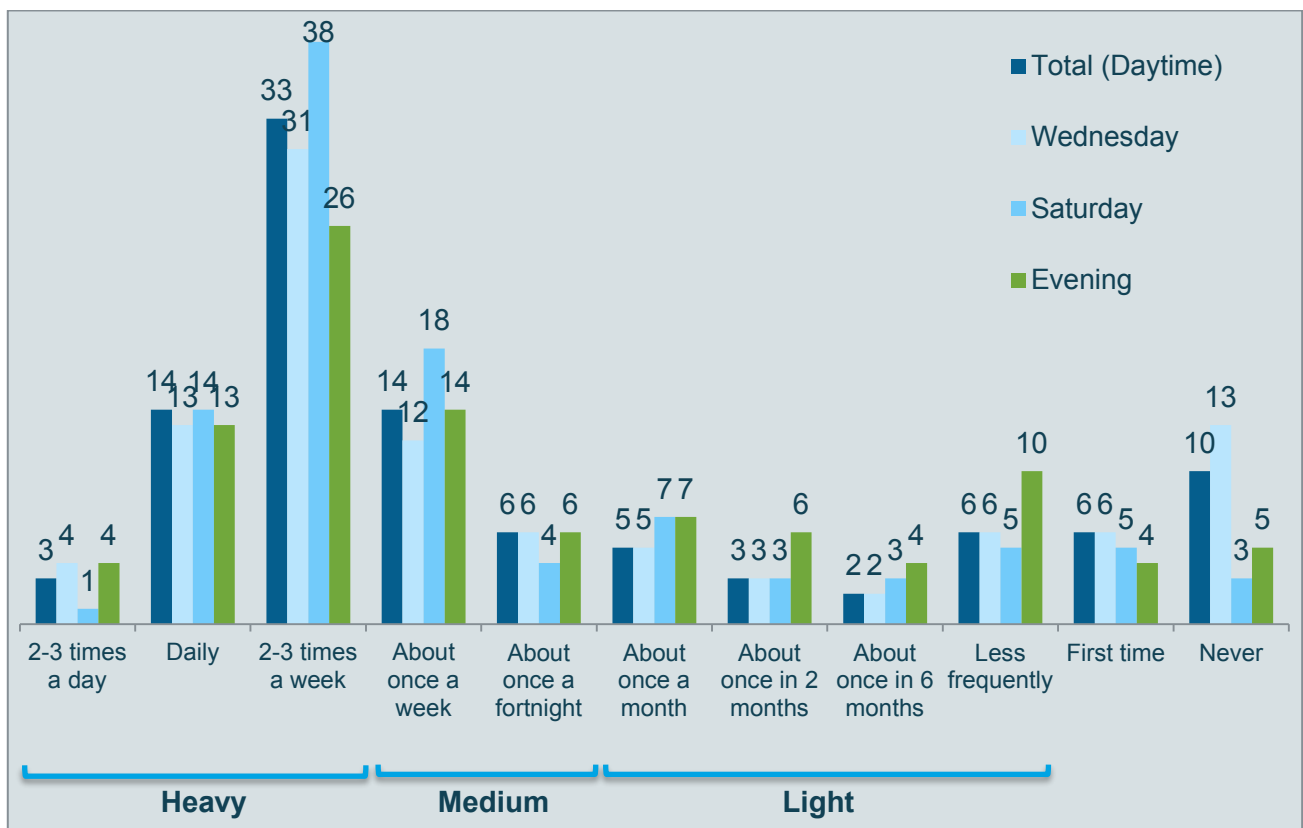
9.1 Frequency of Eating in Kings Cross / Potts Point

A large proportion of the respondents to Kings Cross / Potts Point survey were ‘heavy’ users of restaurants, cafés, hotels, bars and fast food outlets in the area - with half eating in the area at least once a week (50%). This may be a reflection of the consistent use of the area amongst locals (48% lived in Kings Cross / Potts Point).

In addition to the ‘heavy’ users, there was an even spread of ‘medium’ (20%) and ‘light’ users (16%).

One in ten daytime respondents had never eaten in Kings Cross / Potts Point before (10%), with incidence of this being lower during the evening (5%).

Figure 20 – Frequency of Eating in Kings Cross / Potts Point



Q10a. About how often do you dine in or take away from a restaurant / café / hotel / bar / fast food outlet in Kings Cross/Potts Point?

Base: Respondents who visited once a month or less: Daytime (n=75) Evening (n=50)

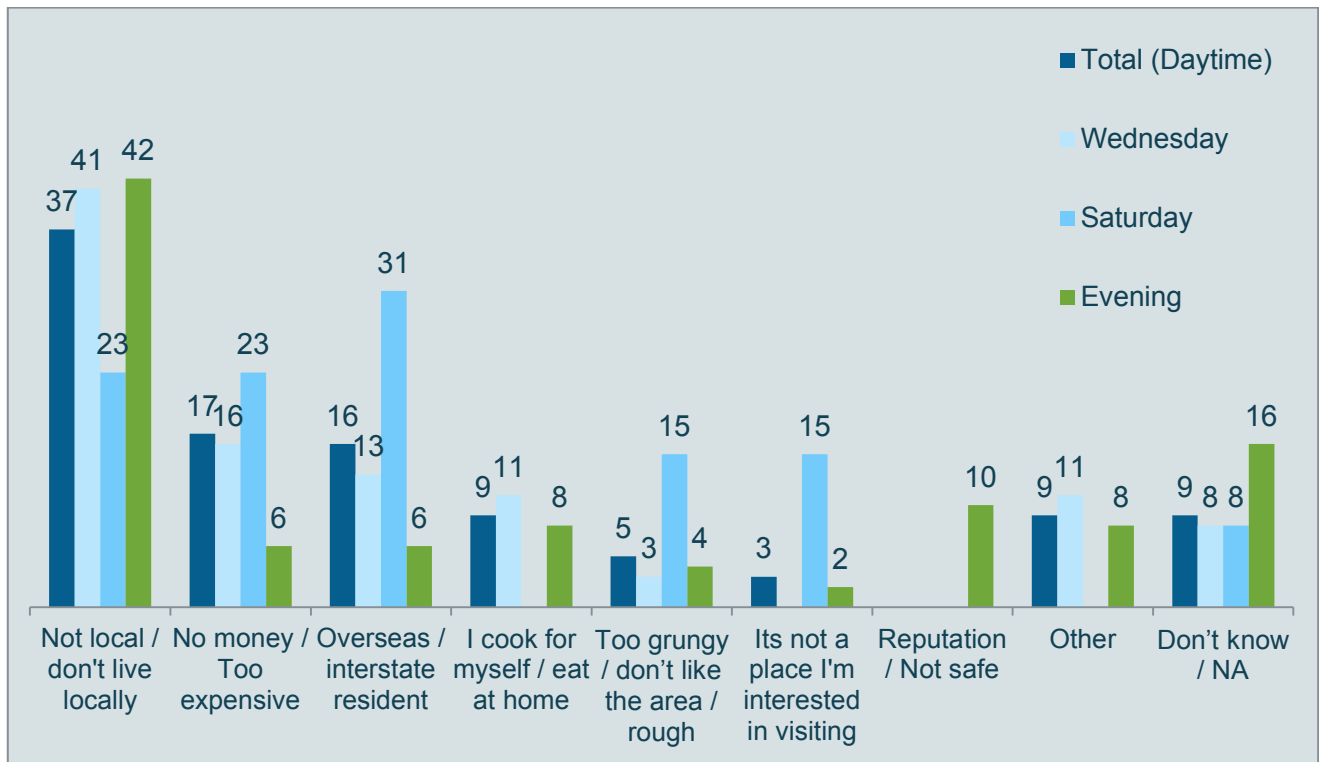
9.2 Reasons for Infrequent Eating at Kings Cross / Potts Point Venues

Amongst those who did not eat in the area frequently, living well outside the Kings Cross / Potts Point precinct was the major reason given for this outcome (37%), however this was less likely on Saturdays (23%).

Other common reasons were that respondents had 'No money / Too expensive' (17%) and 'Overseas / interstate resident' (16%).

One in ten evening respondents mentioned they did not eat in the area frequently because of the reputation and that it was not safe (10%).

Figure 21 – Reasons for Infrequent Eating in Kings Cross / Potts Point



Q10b. Why don't you visit them more often?

Base: Respondents who visited once a month or less: Daytime (n=75) Evening (n=50)

9.3 Frequency of Visiting Entertainment Venues

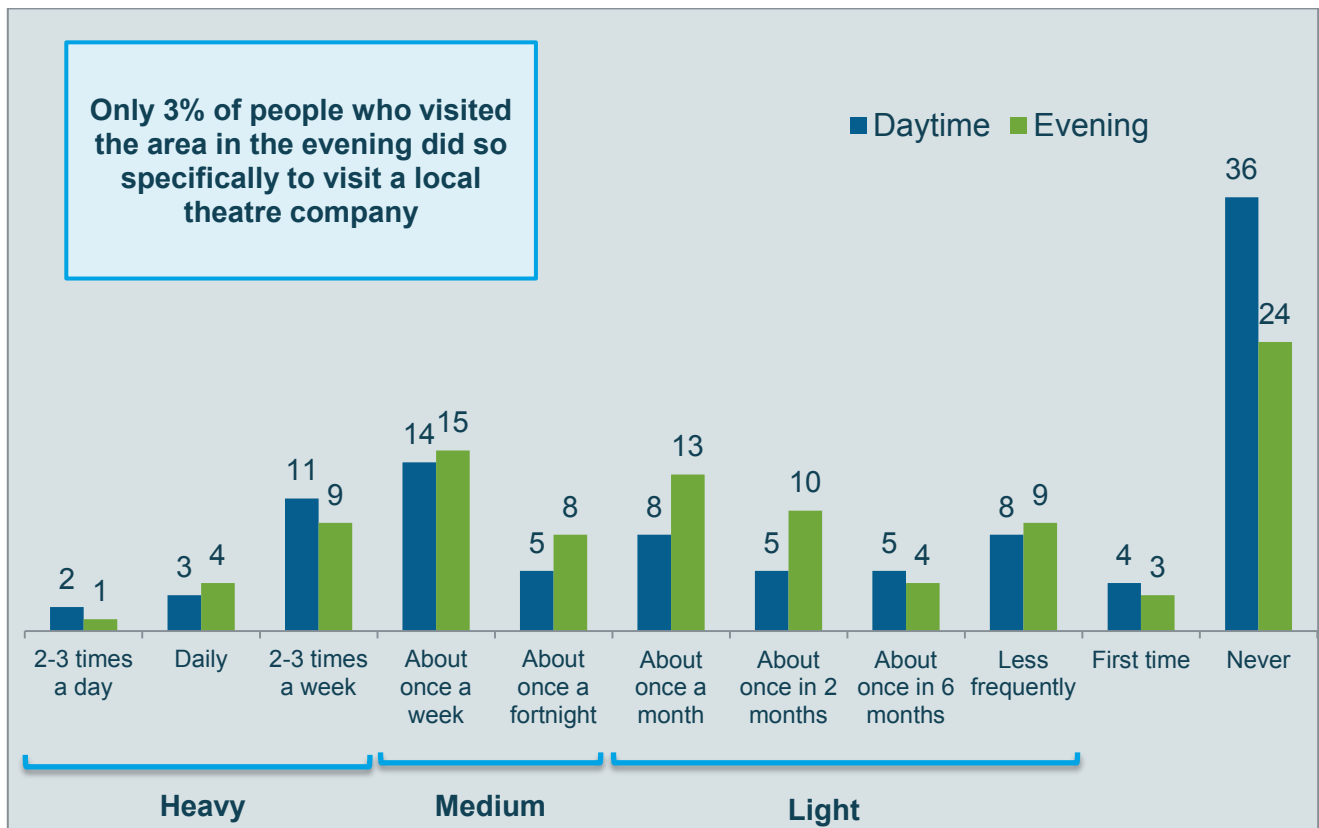
Approximately three quarters of evening respondents had visited an entertainment venue previously (73%), though this was lower amongst the daytime respondents (60%).

However, despite the relatively large proportion of local respondents in the sample, there was not a particularly high proportion of ‘heavy’ users of the entertainment venues in the area (16% daytime, 14% evening). Ultimately this may suggest that the entertainment venues may not be frequented by locals, but rather by visitors from outside the local area.

Respondents interviewed at Manning St and Macleay St were the most likely to indicate that they never visit the entertainment venues (55%, compared to 36% of all daytime respondents).

As a side note visitation the local theatres amongst respondents was marginal, with only 3% of respondents indicating that they visited specifically for a local theatre company.

Figure 22 – Frequently of Visiting Entertainment Venues



Q6a. Are you in this area to specifically visit any of the local theatres (Hayes Theatre Company, Griffin Theatre Company, Darlinghurst Theatre Company, Sydney Independent Theatre Company and Darlinghurst Drama)

Q11. About how often do you visit entertainment venues (clubs \ pubs etc.) in Kings Cross / Potts Point?

Base: Q11. All respondents who answered: Daytime (n=400) (n=315), Q6a. All evening respondents who answered (n=308)

9.4 Preferred Eating Locations

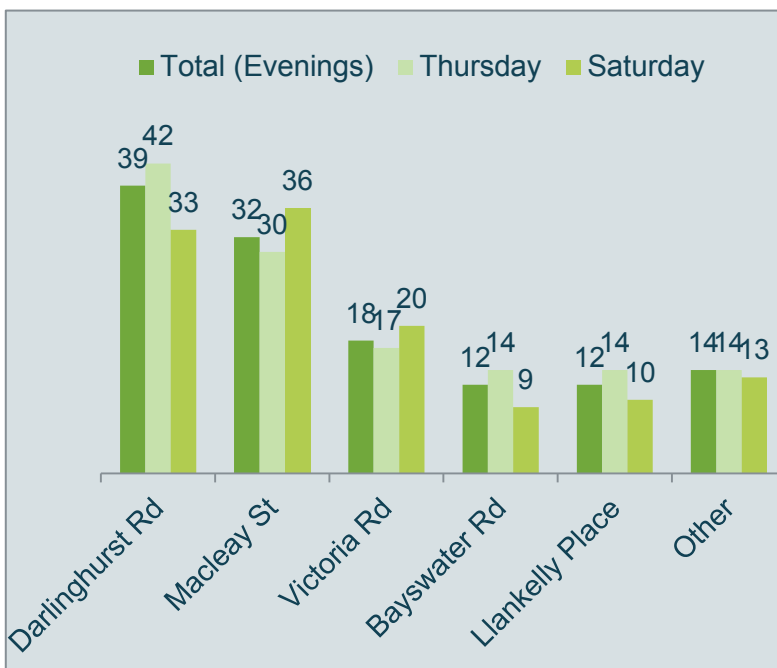
Respondents were most likely to indicate that they dined along Darlinghurst Rd (39%) and Macleay St (32%) in the Kings Cross Potts Point area, although there was a slight trend for respondents to favour Darlinghurst Rd on Wednesdays (42%) and Macleay St on Saturday evenings (36%).

Others dining strips within the Kings Cross / Potts Point area such as Victoria Rd (18%), Bayswater Rd (12%) and Llanckelly Place (12%) were also commonly used albeit at slightly lower levels. This indicates that there is a diverse spread of restaurants and eateries being visited in the area, with no one street being solely used.

Respondents aged 35-49 were more likely to indicate that they dined at Llanckelly Place than any other age group (29%, compared to 12% of all evening respondents asked the question).

The Fratelli restaurants (Fratelli Fresh and Paradiso) (8% in total) and the Sugarmill (7%) were the two most commonly visited eateries. There was also a wide range of other restaurants cited by respondents at lower levels.

Figure 23 – Preferred Eating Locations



Commonly visited restaurants	Total N=198 %
Fratelli / Fratelli Fresh / Fratelli Paradiso	4
The Sugarmill	7
Apollo	4
Billy Kwong	3
Cho Cho San	3
Opium Den	3
Tropicana	3
Fish Shop	3

Q10c. Which of the following streets do you prefer to dine at?

Q10d. Is there a specific restaurant that you like to visit here?

Base: Evening respondents who had been to Kings Cross before and answered (n=242)