

Perth Entertainment Precincts Research 2022 | Final Report

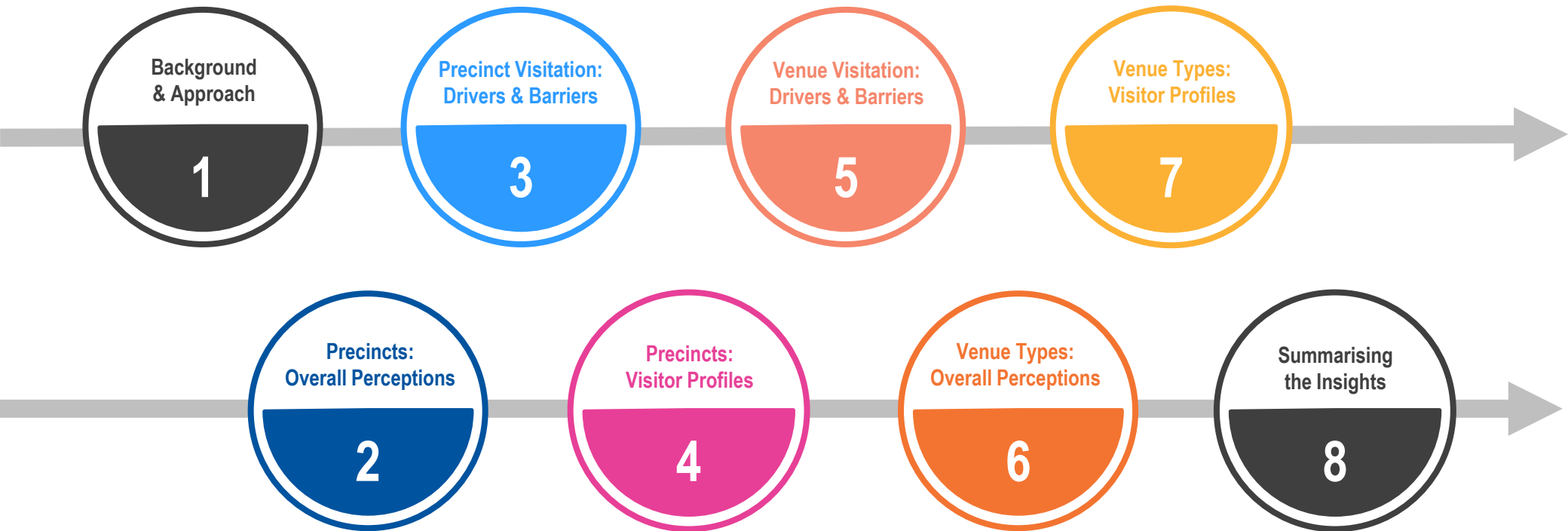
Tourism WA

February 22nd 2023

Prepared by Painted Dog Research



Today's agenda...



Background & Approach



Background to this project

As the peak industry body in WA responsible for the state as a holiday and entertainment destination, it is important for Tourism WA to have a contemporary understanding of the wants, needs, perceptions and impact of entertainment venues and precincts.

Research on this was conducted previously in 2017. However, given the drastic changes in tourism preferences and intrastate spend throughout COVID – and proposed Liquor Reforms – Tourism WA requires new research that provides an updated, accurate reflection of current consumer behaviour and preferences.

Tourism WA commissioned Painted Dog Research to conduct this survey and provide insights into trends and changes in consumer behaviour since 2017. This new wave extends the research to newly developed precincts such as South Perth and the Burswood / Optus Stadium.

It is intended that this research will help to inform future decision-making in relation to supporting tourism growth in WA's entertainment precincts – and provide supporting evidence for liquor license applications. **This report details the findings of this research project.**



Strategic aim & objectives

The overall strategic aim of this research was:

“ To provide contemporary data and insights into WA consumers’ wants, needs and perceptions of entertainment precincts in Perth.

To deliver on the strategic aim, Painted Dog Research achieved the following:

- 1 Measure current visitation and future interest in visiting key entertainment precincts in the Perth metro area and surrounds, including Elizabeth Quay, Northbridge, Fremantle, Scarborough, Beaufort Street, Subiaco, Victoria Park, Leederville, South Perth and the Optus Stadium/Burswood precincts.
- 2 Measure perceptions of key precincts, including vibrancy, safety, venue range, accessibility, etc.
- 3 Measure usage, interest and preferences in different types of licenced venues when visiting precincts, to better understand visitors’ wants and inform the optimal mix of venues that will drive visitation.
- 4 Explore the importance of factors like venue mix and other considerations (including access to public transport or similar services) in how they influence perceptions of precincts and drive visitation.
- 5 Understand the profile of visitors to entertainment precincts, including who they visit with and the different types of visits (e.g., business vs. leisure).
- 6 Measure spend to understand direct and indirect economic impact of entertainment precincts.
- 7 Provide comparisons between current and previous research to explore changes in consumer behaviour and consolidate trends.

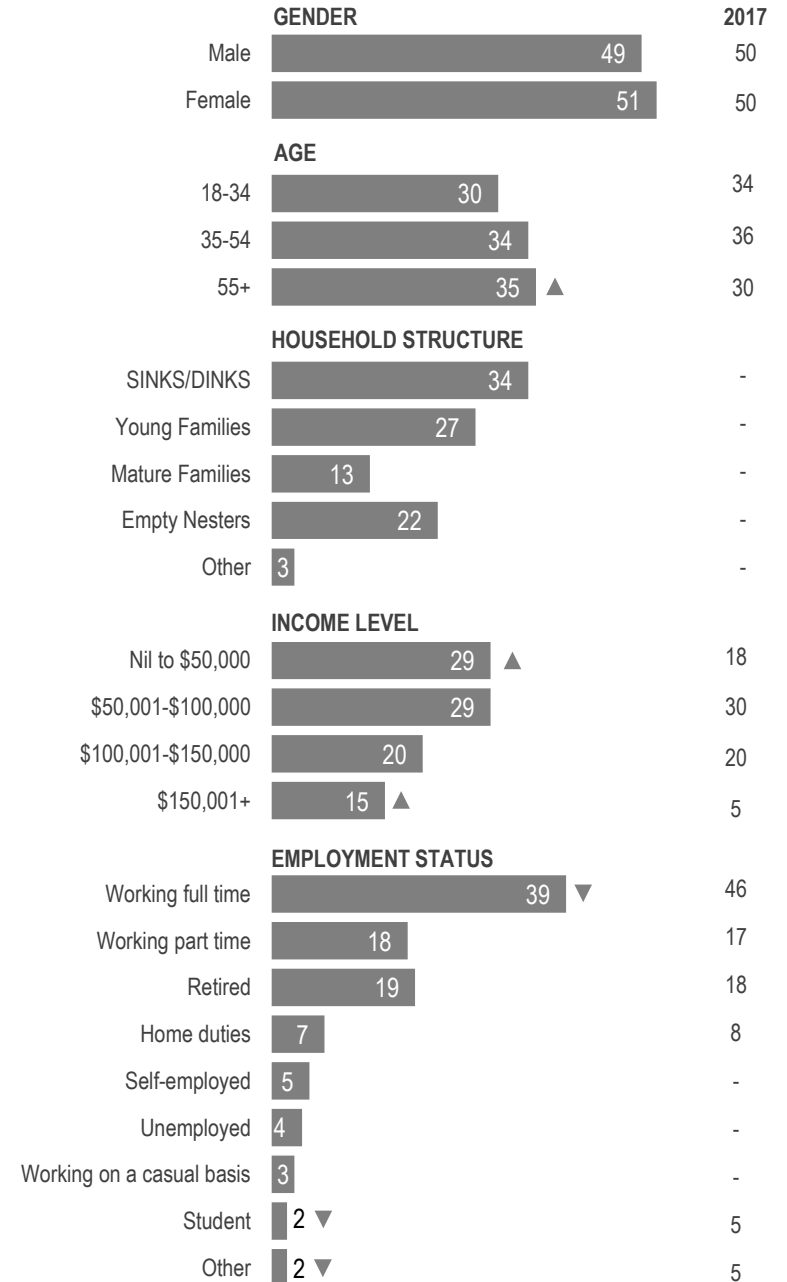


How the research was conducted

| 1 Approach | 2 Data Collection | 3 Values | 4 Significance |
|---|--|---|--|
| <ul style="list-style-type: none">• An online survey was conducted among residents from across WA (metro and regional) to achieve a WA representative sample.• Due to the nature of the questions asked within the survey, to qualify, regional residents must have visited Perth for leisure purposes within the past 2 years.• Respondents were sourced via an online research panel.• Fieldwork was conducted from 12 December 2022 – 3 January 2023. | <ul style="list-style-type: none">• A total of n=821 complete responses were collected.• An approximate 75:25 metro/regional split was achieved. Overall, n=611 responses were collected from Metro WA and n=210 from Regional WA.• Based on the overall sample, the margin of error is +/-3.42% at a 95% confidence interval. | <ul style="list-style-type: none">• Values shown in the charts are percentages (%), unless otherwise indicated.• Some figures may add up to 101 or 99 due to rounding or if they were multiple-response questions. | <ul style="list-style-type: none">• Significance is tested at the 95% confidence interval.• Differences between sub-groups are indicated by stars:<ul style="list-style-type: none">★ = Significantly higher☆ = Significantly lower• Differences between time periods are indicated with arrows.<ul style="list-style-type: none">▲ = Significantly higher▼ = Significantly lower• Where no significant differences exist between sub-groups, results may not be charted. |

Sample profile: demographics

Overall, n=821 survey responses were collected. The profile of respondents is reflective of the WA population by age and gender – and also includes a representative spread of household types, incomes levels and employment. The sample profile is also relatively consistent with the survey sample collected in 2017.



Sample profile: geographics

Around 3 in 4 of the total sample live in WA Metro and about 1 in 4 in Regional WA. Compared to 2017, a broader and more representative spread of Regional residents were included in the 2022 survey.

Around 1 in 3 Metro respondents live in the southern suburbs, and 1 in 4 live in the northern suburbs.



| | LOCATION | 2017 |
|------------------------------------|-----------|------|
| NET: METRO | 74 | 75 |
| Southern Suburbs | 36 | 26 |
| Northern Suburbs | 25 | 27 |
| Eastern Suburbs | 7 | 6 |
| Inner City | 3 | 4 |
| Western Suburbs | 2 | 5 |
| Perth Hills | 1 | 7 |
| Net: REGIONAL | 26 | 25 |
| South West, Great Southern or Peel | 16 | 17 |
| Goldfields-Esperance or Wheatbelt | 5 | 3 |
| Mid-west | 3 | 4 |
| Kimberley | 1 | - |
| Pilbara | 1 | - |

Entertainment Precincts: Overall Perceptions



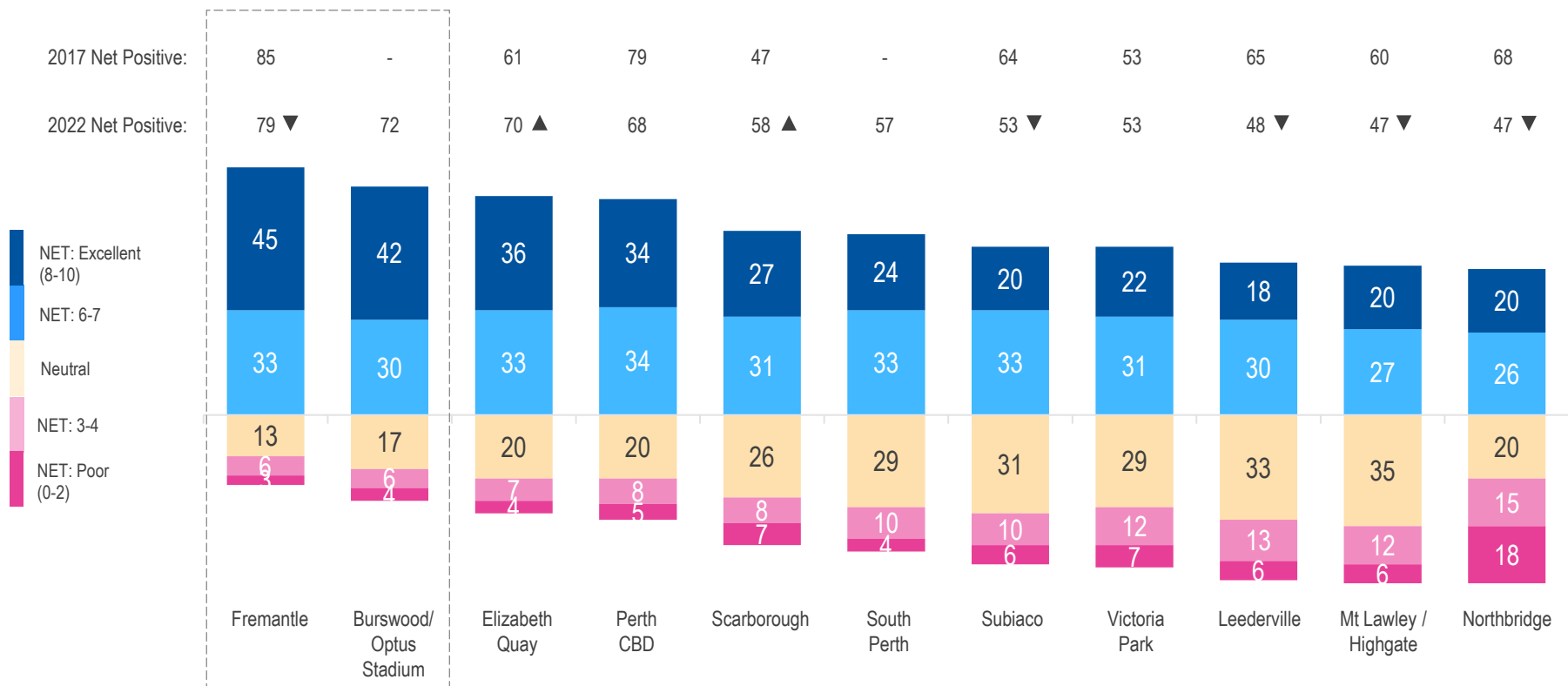
Fremantle remains the most
favoured entertainment
precinct in Perth!



This remains consistent with 2017, with around 4 in 5 holding Freo in high regard – with Optus a close second.

However, compared to 2017, perceptions of Subi, Leederville, Mt Lawley and Northbridge have all significantly declined – likely a result of COVID and other factors causing venues and businesses to close in those areas.

Positively, perceptions of Elizabeth Quay and Scarborough have increased.



QB7. What is your overall opinion of the following entertainment precincts? Base: All Respondents, 2022 (n=821); 2017 (n=606).

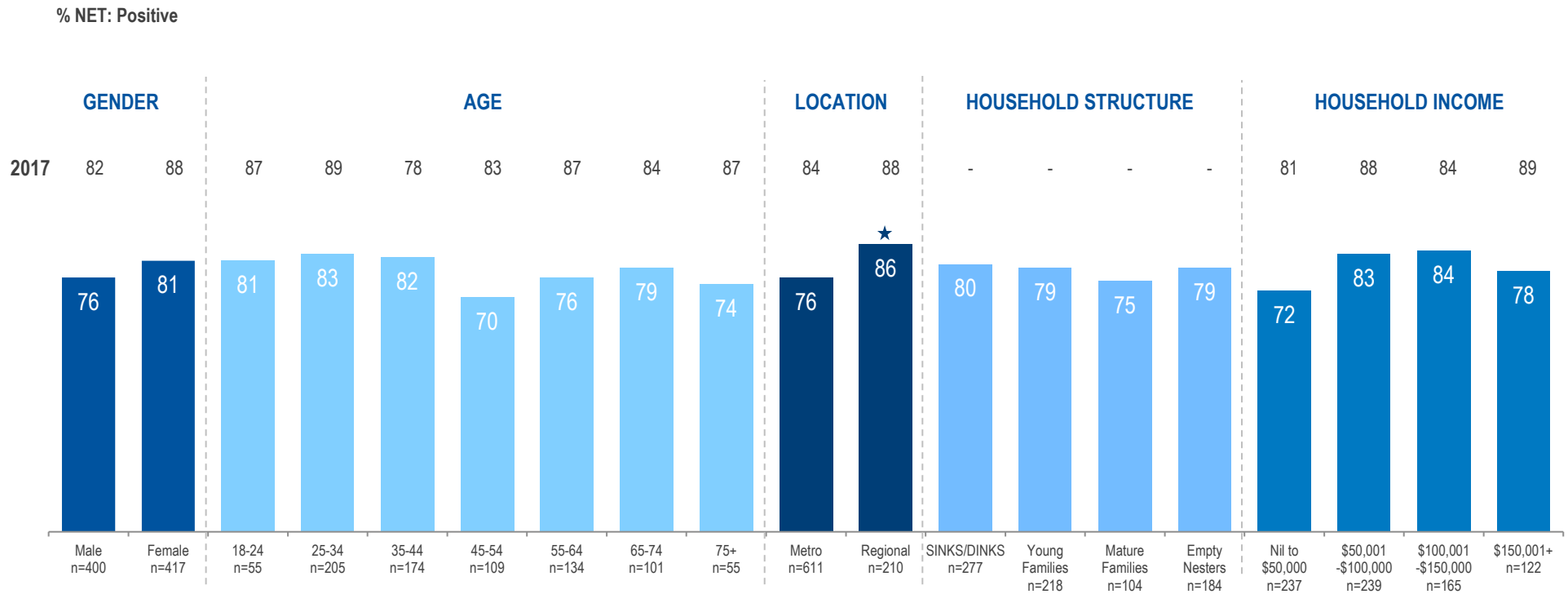
Since 2017, the order of preference has changed – with Scarborough increasing in favour the most and Northbridge falling most considerably.

This demonstrates that consumer preference, values and sentiment have slightly shifted in the past 5 years, as has Perth and the offerings and reputations of each of its entertainment precincts.

Rank
(% 6-10/10 overall opinion)

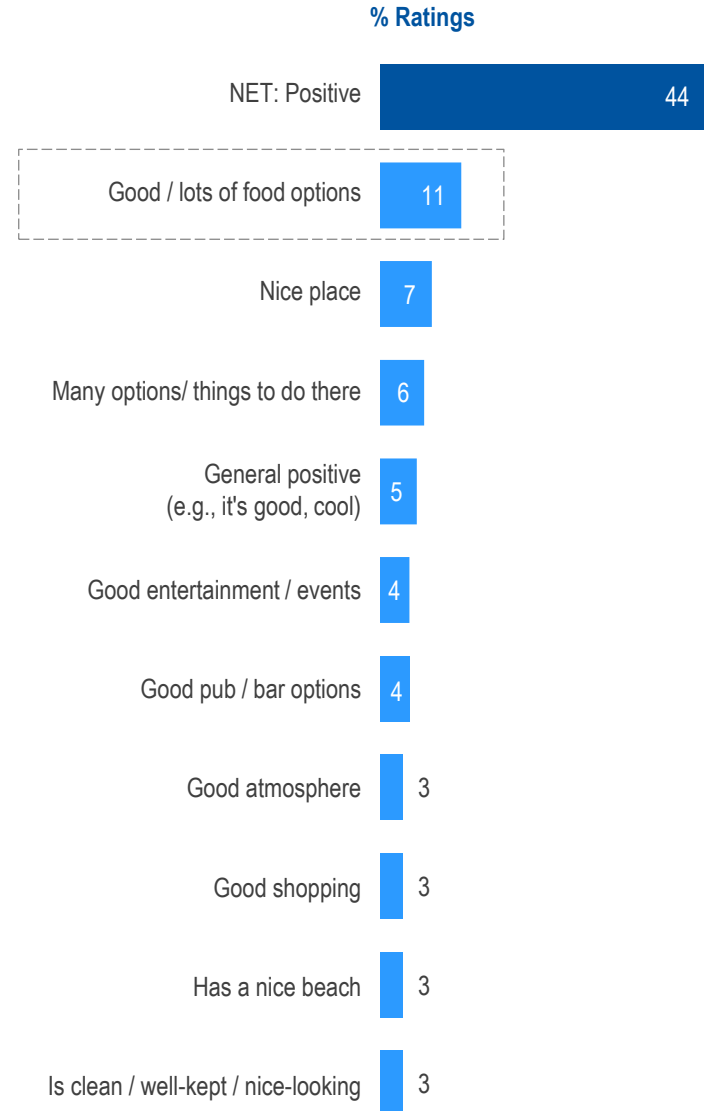
| | 2017 | 2022 |
|--------------------------|------|------|
| Fremantle | 1 | 1 |
| Burswood / Optus Stadium | - | 2 |
| Elizabeth Quay | 6 | 3 |
| Perth CBD | 2 | 4 |
| Scarborough | 9 | 5 |
| South Perth | - | 6 |
| Subiaco | 5 | 7 |
| Victoria Park | 8 | 8 |
| Leederville | 4 | 9 |
| Mt Lawley / Highgate | 7 | 10 |
| Northbridge | 3 | 11 |

As seen in 2017, Fremantle is rated highly by the whole community - but especially among those in regional WA.



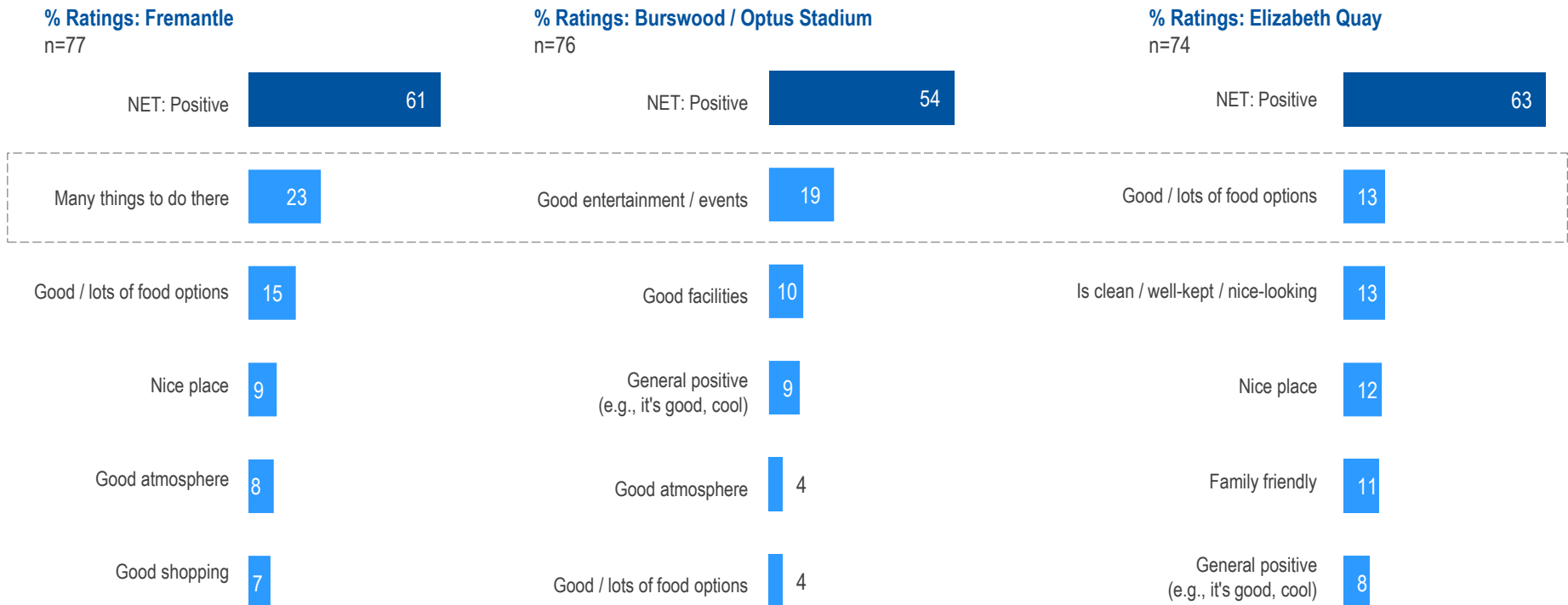
QB7. What is your overall opinion of the following entertainment precincts? Base: All Respondents, 2022 (n=821); 2017 (n=606).

Overall, the biggest reason why someone likes a precinct is because it has good / lots of food options.



However each of the Top 3 precincts are rated highly for different reasons.

People favour Fremantle for its diverse offerings and its food, whereas Burswood / Optus Stadium is rated positively for its entertainment and facilities. Elizabeth Quay is favoured for its food options and aesthetics / presentation.



In their own words...



"You can do a lot of things from having coffee, going for a meal, or going out at night" – regarding Fremantle, 18-34 Female

"When sport is on is great place to be. Do head to casino sometimes too which has great bars" – regarding Burswood, 18-34 Female

"This is a fantastic place the design is on par with any great international spot. Day or night I just love the layout and the restaurants. I've taken photos that people from overseas just love." – regarding Elizabeth Quay, 55+ Male

"Love Fremantle on the weekend, visiting the markets, fishing, going to the harbour for lunch. A family friendly entertainment place with plenty to do" – regarding Fremantle, 55+ Male

"Family friendly, nice atmosphere, good food options, easy to get to." – regarding Elizabeth Quay, 35-54 Male

"It is a pleasant, scenic precinct with a variety of venues to my taste." – regarding Elizabeth Quay, 55+ Male

"Beautiful place to wonder around. So much good food and entertainment" – regarding Fremantle, 55+ Female

"It's fun, clean, and has good entertainment" – regarding Burswood, 35-54 Female

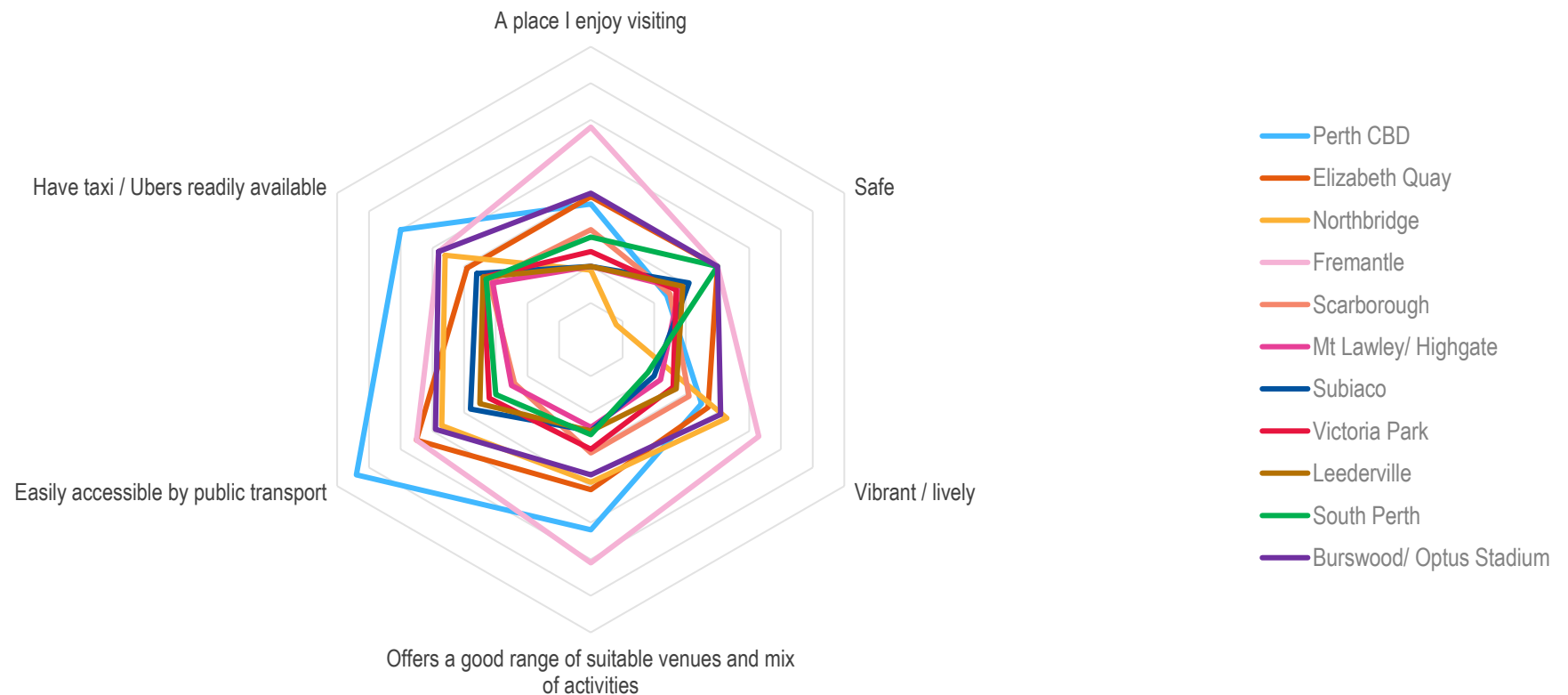
"Great location for everything. Bars, meals, entertainment, close to the city" – regarding Burswood, 35-54 Female

Each precinct is known for different things – however Fremantle stands out as a place people enjoy visiting.



Freo and Perth CBD outperform other precincts across most attributes.

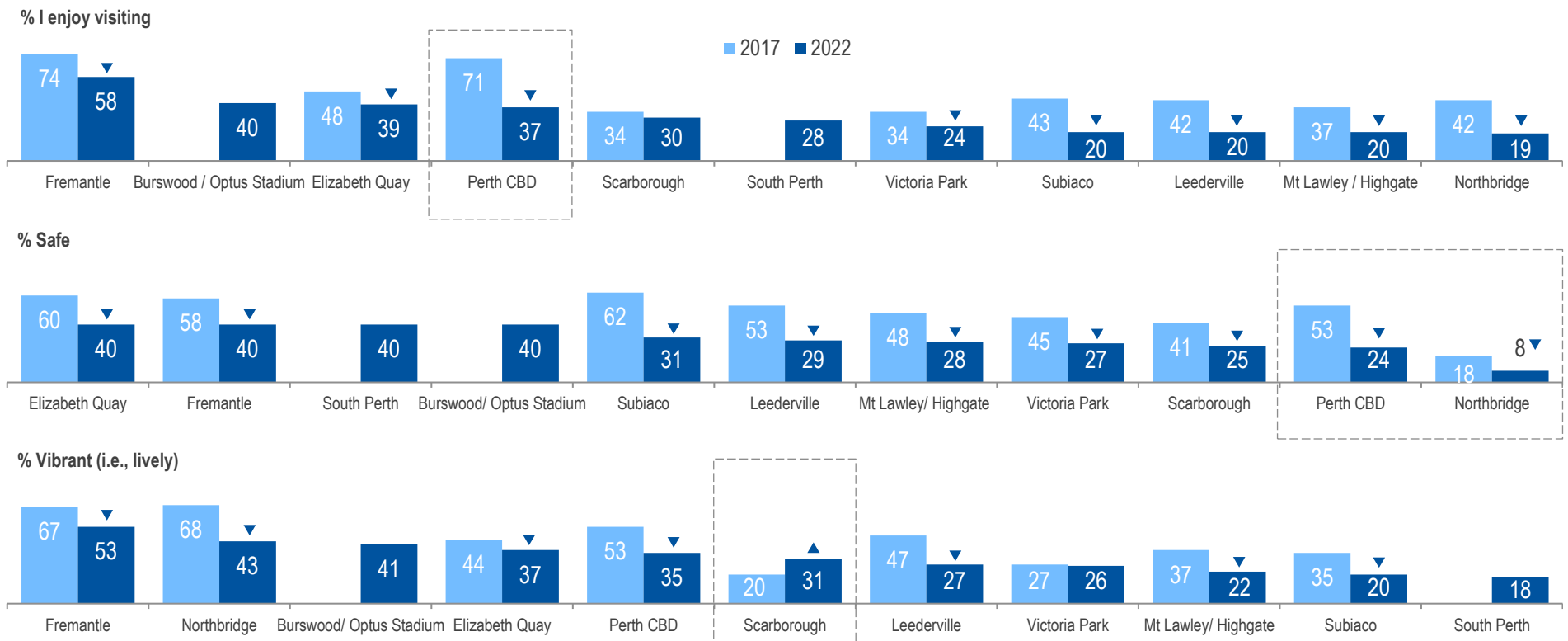
Fremantle stands out as being a place of enjoyment, safety, vibrancy, and having a good range of venues and activities. Perth CBD on the other hand excels in being accessible – in terms of public transport and having taxis and Ubers readily available.



However compared to 2017, most precincts are now perceived to be less enjoyable, safe, and vibrant.

Scarborough however is seen as more vibrant now compared to in 2017 – likely due to the \$100 million revitalisation project in late 2017 along with the introduction of the Sunset Markets.

Perceptions of safety and enjoyment have dropped noticeably for Perth CBD, and Northbridge continues to be the precinct that is perceived to be least safe.

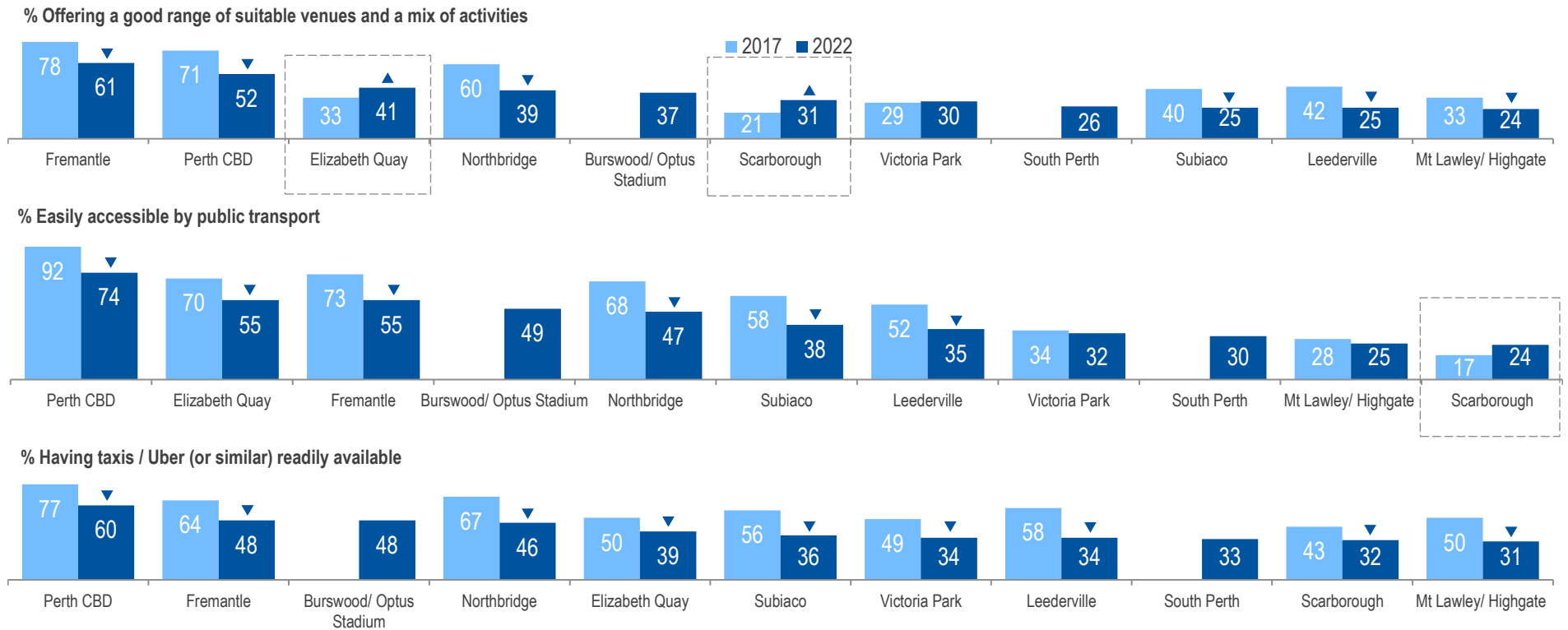


QB1. Would you describe the following precinct as a place I enjoy visiting/ safe/ vibrant? Base: All Respondents, 2017 (n=606); 2022 (n=821).

Similarly, most precincts are considered less accessible than they were in 2017 – and offer less variety.

As well as being seen as more vibrant compared to 2017, Scarborough is also now more strongly perceived as offering a range of suitable venues and activities. However, even though perceptions of accessibility improved as well for Scarborough, it still remains as the least accessible precinct.

More also perceive Elizabeth Quay to offer a good range of suitable venues and activities in 2022, compared to five years ago.

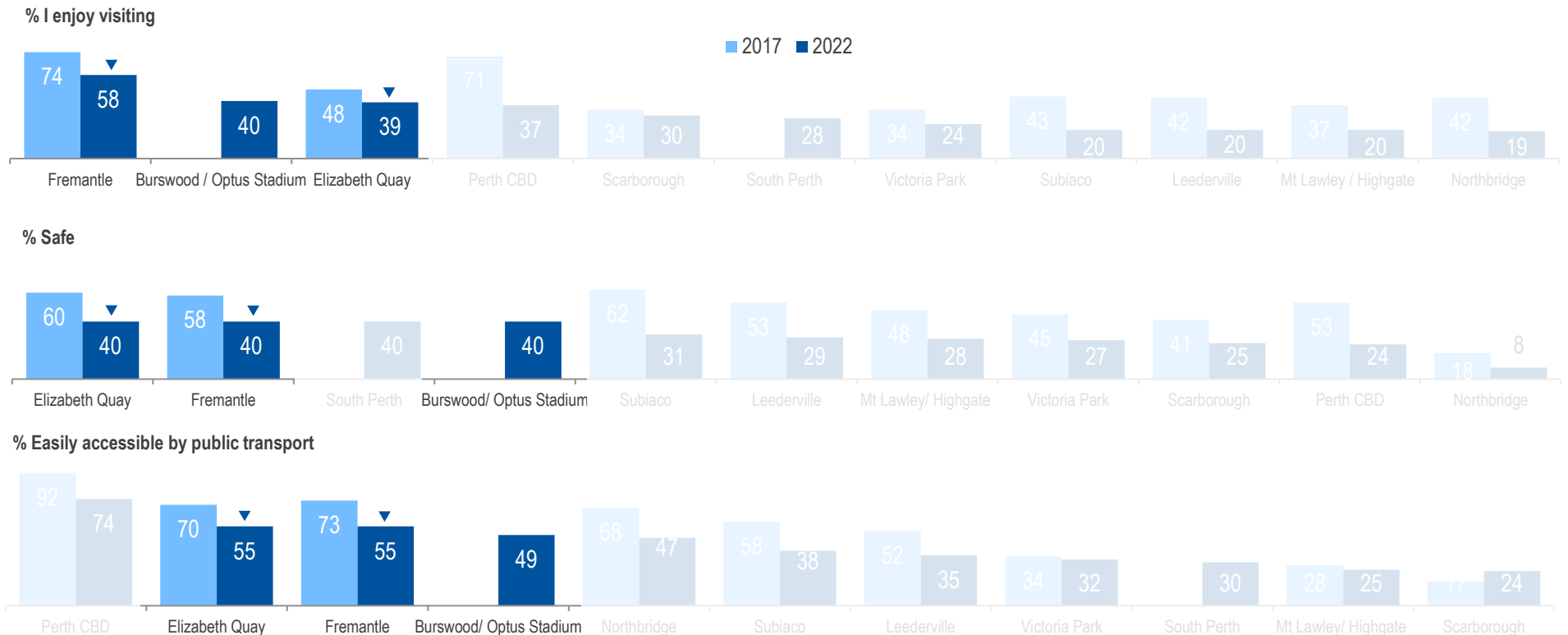


QB1. Would you describe the following precinct as offering a good range of suitable venues and a mix of activities/ easily accessible by public transport/ taxis / Uber readily available? Base: All Respondents, 2017 (n=606); 2022 (n=821).

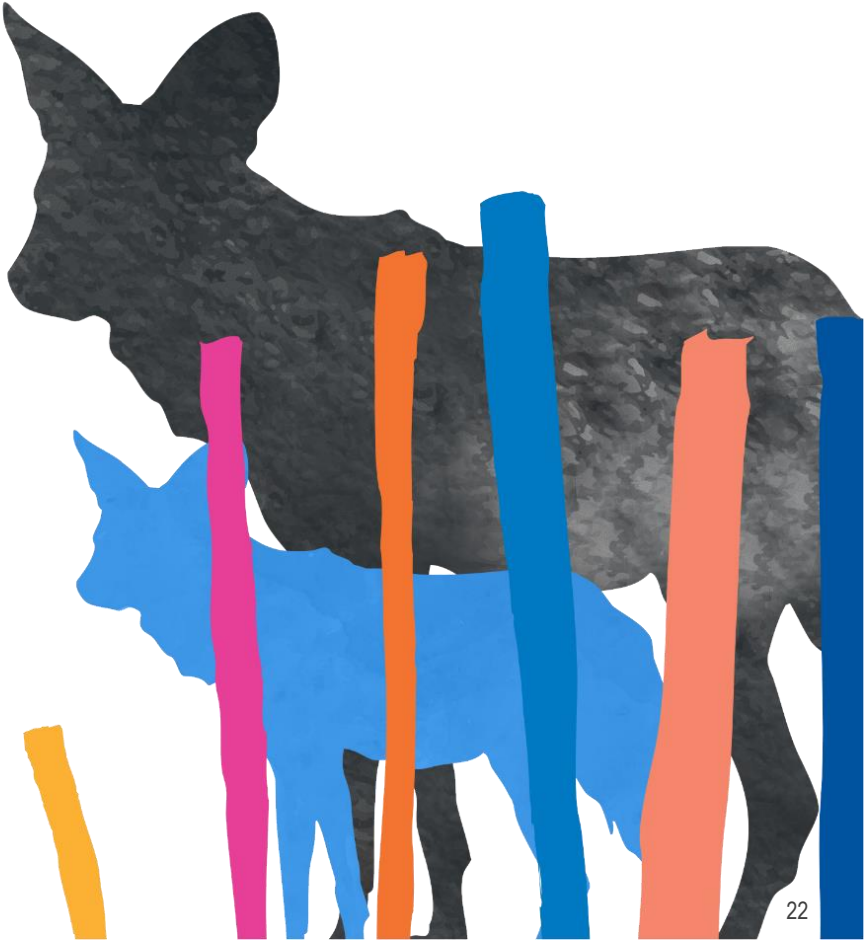
For the Top 3 highest-rated precincts, they all rate highly on a few common attributes.

Compared to other precincts, Fremantle, Burswood / Optus Stadium and Elizabeth Quay are all perceived to deliver enjoyment, safety, and public transport accessibility – outperforming most other precincts in these areas.

This suggests that these attributes are important drivers of what makes a precinct highly rated – and are key to attracting and retaining visitors. It's important to note that enjoyment and safety are closely linked to the types of venues in the precinct – and the types of other patrons they attract.



Entertainment Precincts: Visitation Behaviour

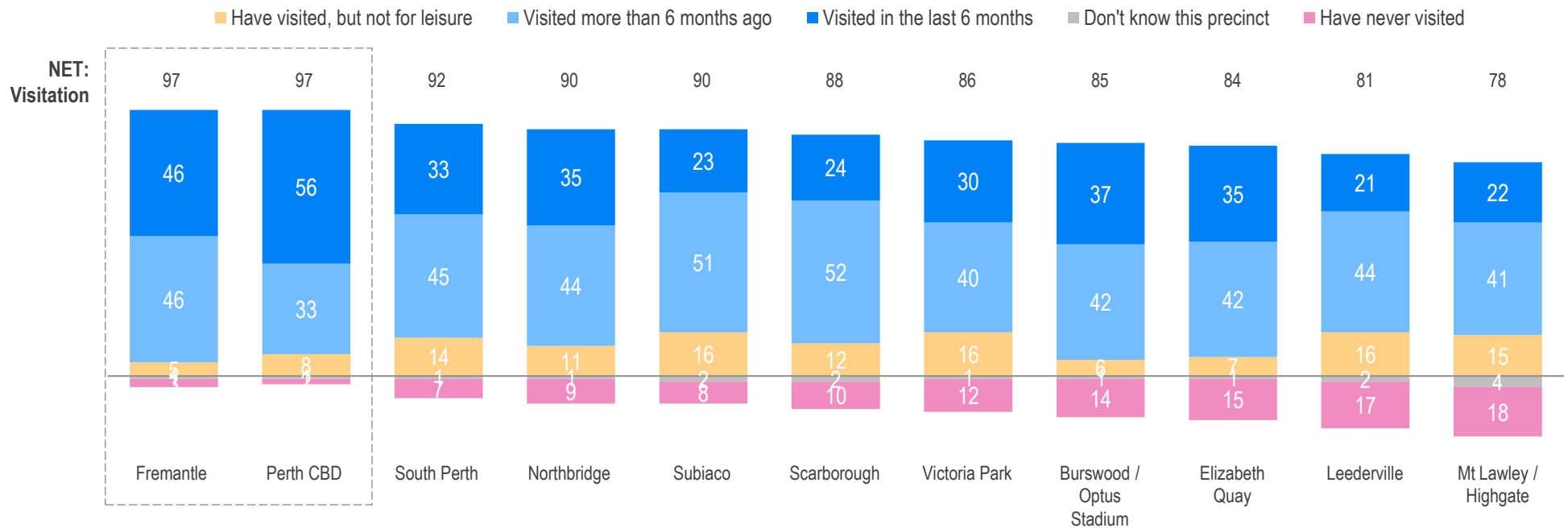


Freo and Perth CBD are the most visited entertainment precincts.



For leisure or otherwise, almost all have visited both precincts.

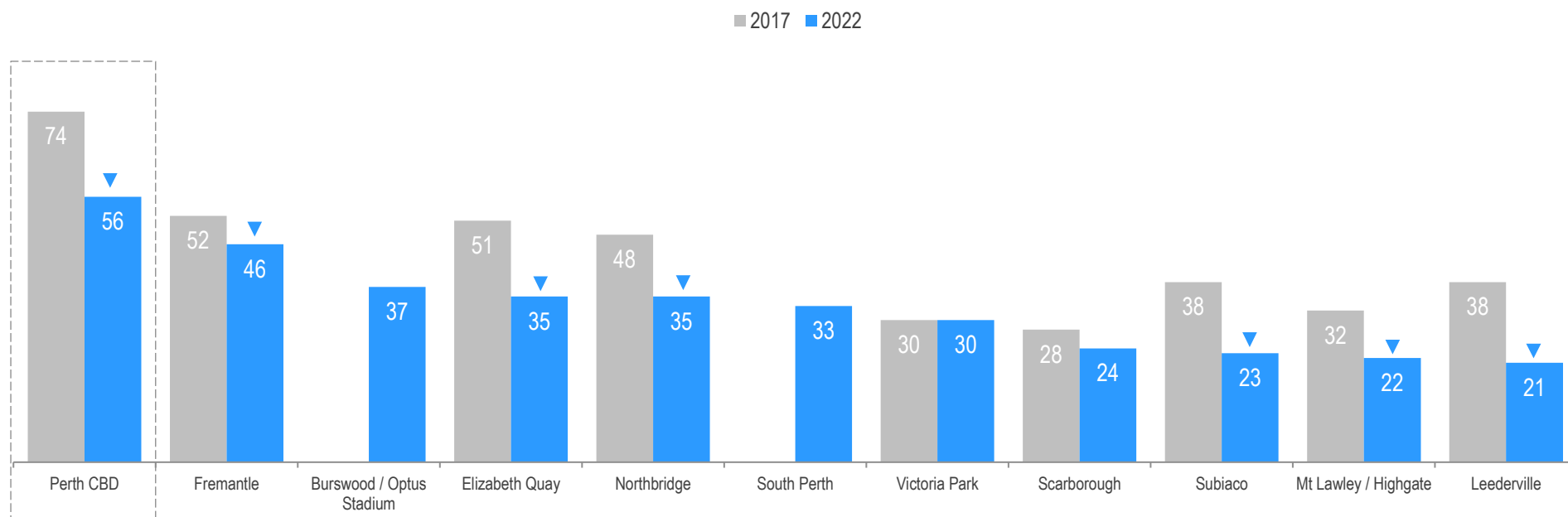
In most instances, the WA community members who have not visited these precincts are those who live in regional areas.



More than half have visited the CBD in the last 6 months for leisure – however this has dropped since 2017.

This drop in recent leisure visitation compared to 2017 has been seen across a number of other precincts as well, namely Fremantle, Elizabeth Quay, Northbridge, Subiaco, Mt Lawley, and Leederville – which is likely a sign that WA is still recovering from the impacts of COVID, and people are still feeling cautious to mix with larger crowds.

% Visited in the last 6 months



QA1. Which of the following statements best describes your involvement with each of these precincts for leisure or entertainment purposes? Base: All Respondents, 2022 (n=821); 2017 (n=606)

The most popular leisure precincts are visited mainly by metro residents and those aged 25-44.

Interestingly, visitation to these precincts also increases with household income, with those earning \$150,001+ more likely to have visited in the last 6 months.



QA1. Which of the following statements best describes your involvement with each of these precincts for leisure or entertainment purposes?

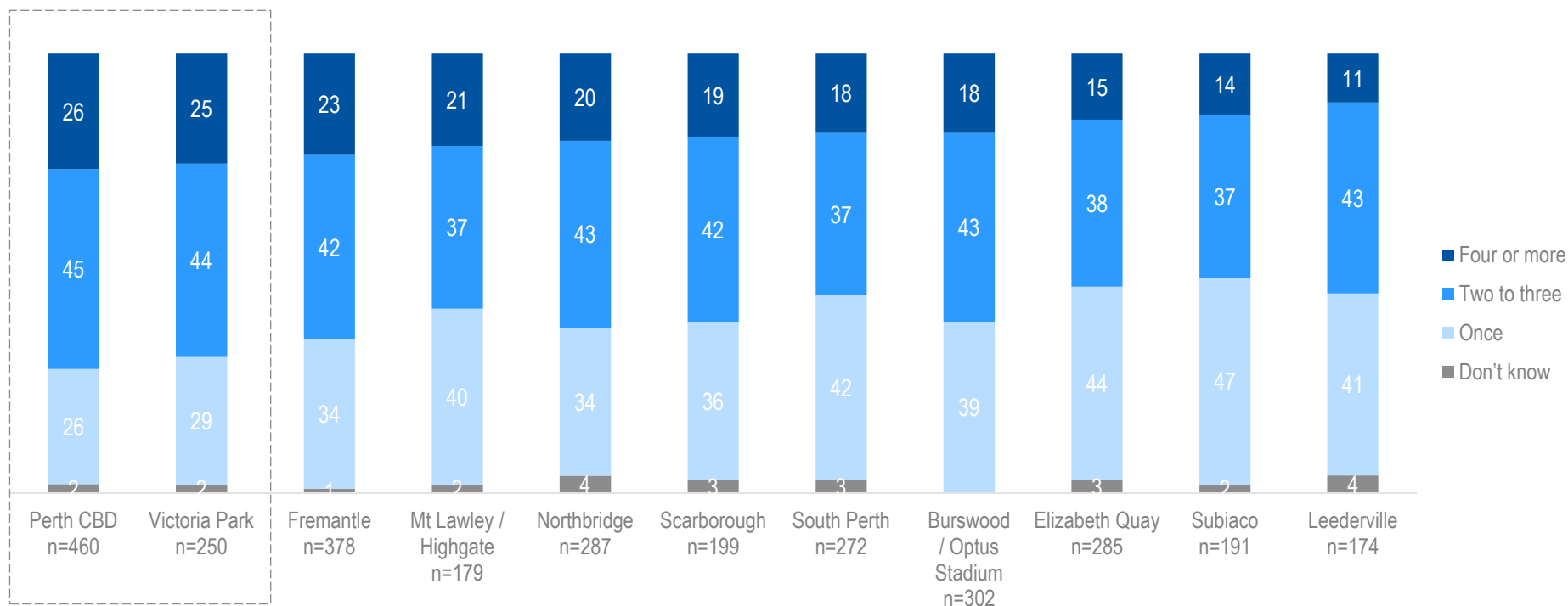
While less than 1 in 3 have visited Vic Park in the last 6 months – it's a popular precinct for repeat visitation.



Around 1 in 4 of those who visited Vic Park or the CBD in the past 6 months have visited four or more times.

This makes the CBD the most visited, and most frequently visited entertainment precinct in Perth.

% Number of visits in last 6 months

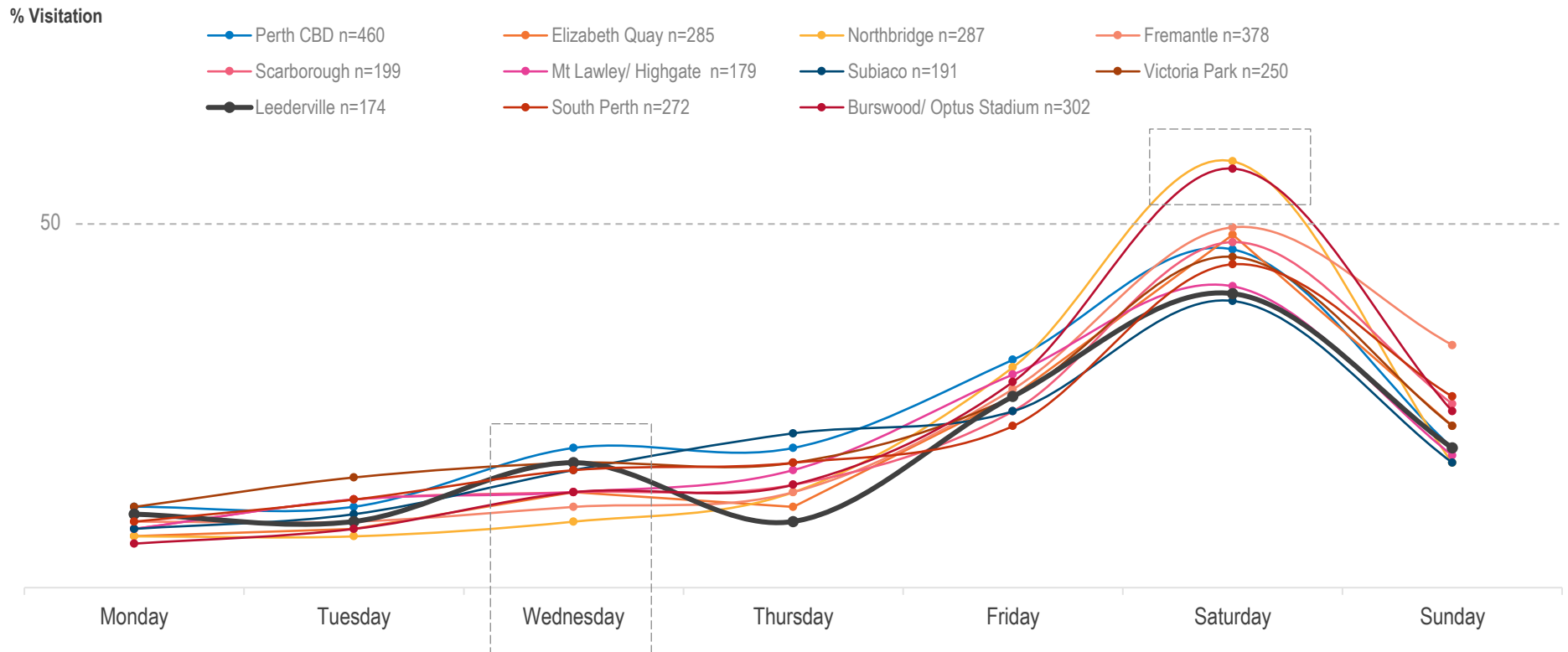


The weekends are the most popular time to visit any precinct – and people are mostly visiting with partners.



Residents visit these entertainment precincts most often on Saturdays.

Interestingly, Leederville has a mid-week visitation spike on Wednesdays – likely due to nightlife in the area on this day. For those who visit Northbridge and Burswood / Optus Stadium, more than half visit these areas on Saturdays.



For most precincts, visitation peaks in the afternoon...

...however, Burswood / Optus Stadium and Northbridge become more visited during the evening.

% Visitation



Morning

Afternoon

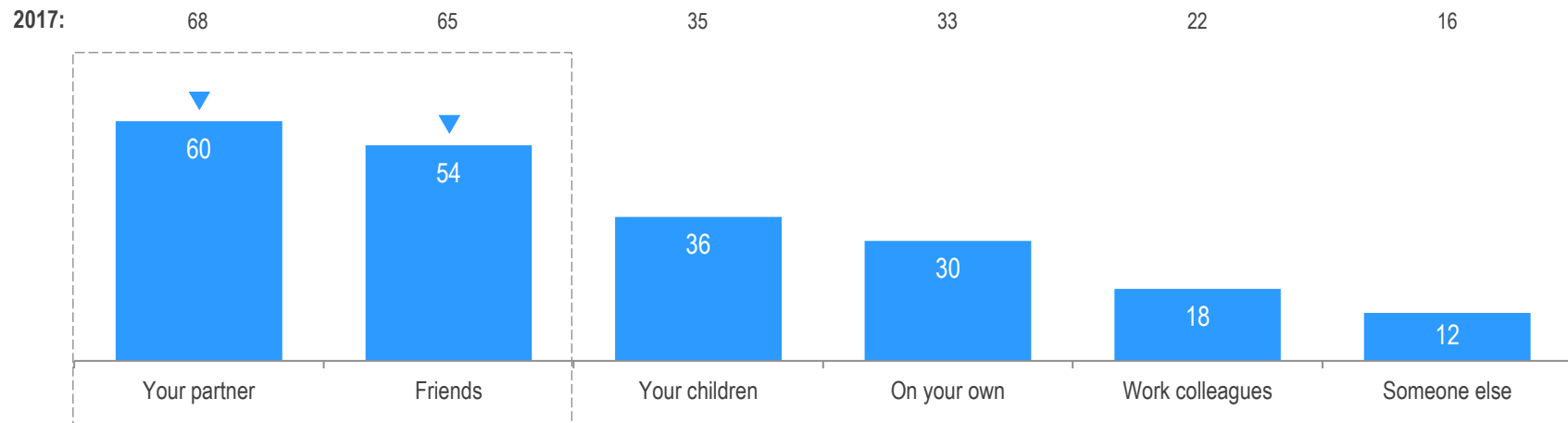
Evening / night

Overall, 3 in 5 of visits are with a partner, and more than half with friends.

Over 1 in 3 visit with their children – showing the demand for family friendly precincts and venues.

While partners and friends are still the most popular companions, there are less visiting with partners and friends this time compared to 2017.

% Visitation



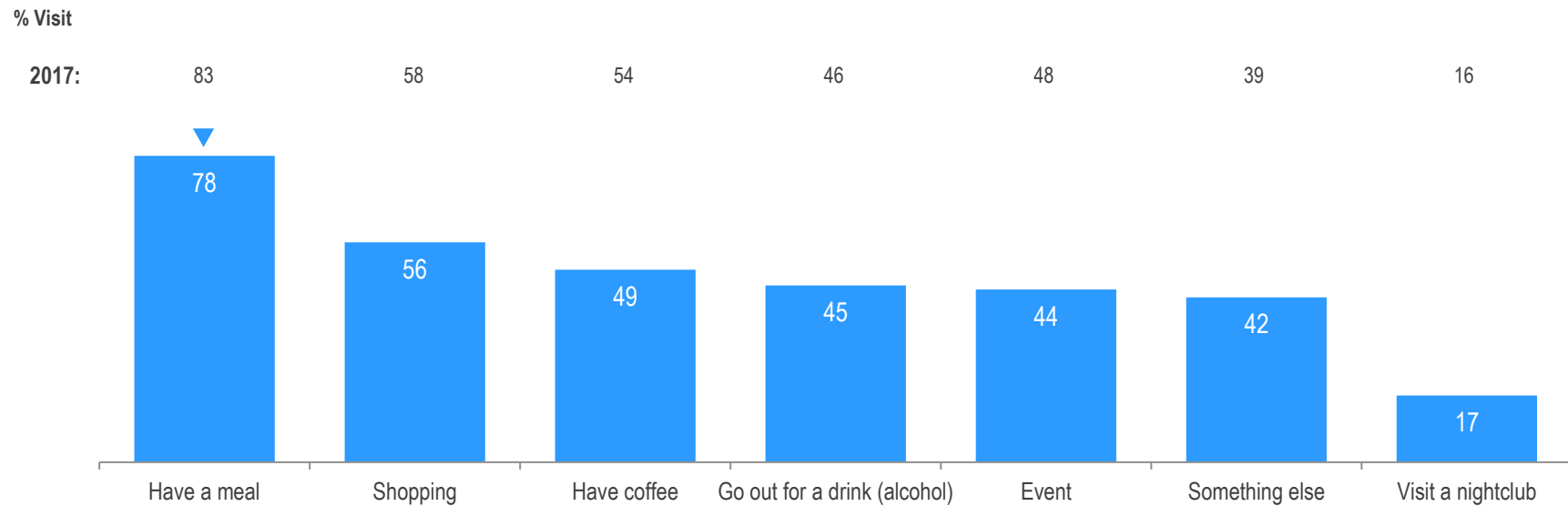
People visit each precinct for different reasons – but going out for a meal is a popular activity in any location!



More than 3 in 4 visit a precinct to have a meal.

However, less this wave visit a precinct to have a meal compared to when in 2017.

The second most popular activity overall is to shop, followed by having coffee, and an alcoholic drink.



Each type of activity has a different 'go-to destination' precinct.

Out of all precincts, Perth CBD is most visited for shopping, Burswood for events, and Northbridge for drinks and nightclubs. The most commonly visited precinct for a meal is Victoria Park and Fremantle for coffee.

■ Highest scoring precinct per activity
■ Lowest scoring precinct per activity

| | Perth CBD n=460 | Fremantle n=378 | Burswood / Optus Stadium n=302 | Elizabeth Quay n=285 | Northbridge n=287 | South Perth n=272 | Victoria Park n=250 | Scarborough n=199 | Subiaco n=191 | Mt Lawley / Highgate n=179 | Leederville n=174 |
|-----------------------|--------------------|--------------------|---|----------------------------|----------------------|-------------------------|---------------------------|----------------------|------------------|----------------------------------|----------------------|
| Shopping | 50 | 30 | 3 | 9 | 11 | 17 | 24 | 16 | 31 | 16 | 16 |
| Have a meal | 42 | 56 | 37 | 40 | 50 | 35 | 59 | 42 | 33 | 51 | 53 |
| Have a coffee | 22 | 30 | 7 | 19 | 13 | 26 | 23 | 28 | 23 | 29 | 17 |
| Go out for a drink | 22 | 23 | 21 | 21 | 35 | 13 | 14 | 19 | 14 | 26 | 20 |
| Event | 17 | 15 | 54 | 18 | 13 | 12 | 5 | 8 | 11 | 8 | 8 |
| Visit a nightclub | 7 | 5 | 2 | 2 | 23 | 3 | 3 | 6 | 3 | 4 | 5 |
| Something else | 13 | 17 | 17 | 27 | 10 | 30 | 11 | 23 | 21 | 13 | 10 |

Despite each precinct being 'known' for different activities, most visit to have a meal in each location.

Burswood / Optus Stadium is the only precinct where the most common activity is attending an event, rather than having a meal – which is unsurprising for that area.

■ Highest scoring activity per precinct
■ Lowest scoring activity per precinct

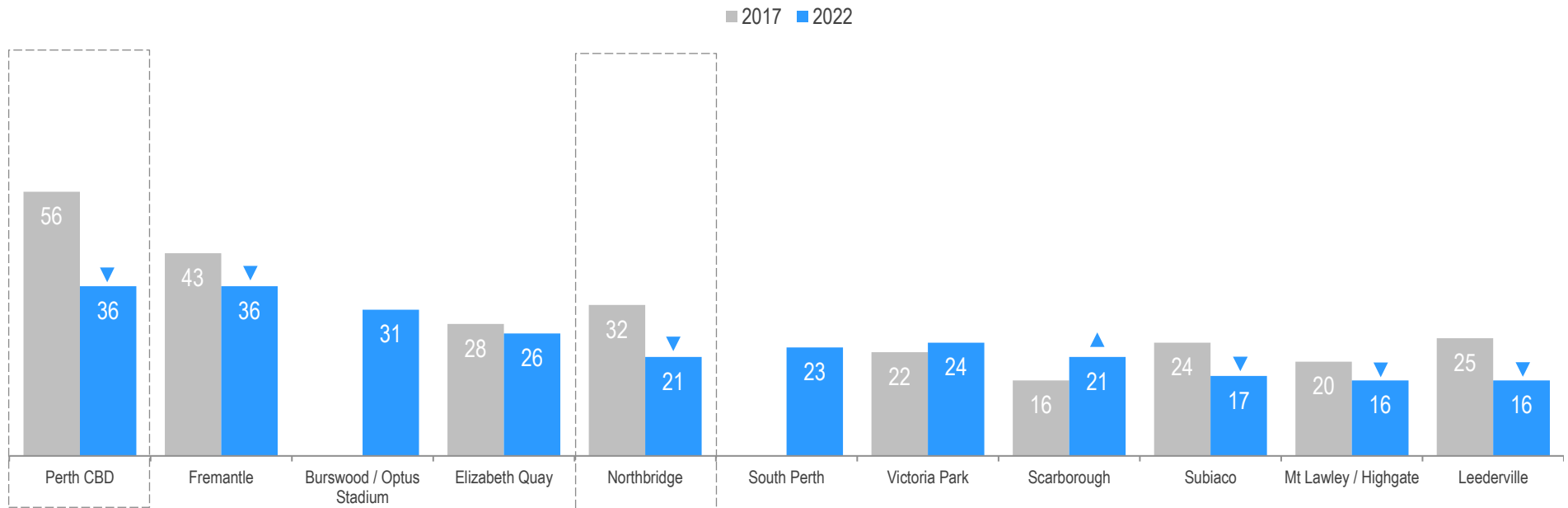
| | Perth CBD n=460 | Fremantle n=378 | Burswood / Optus Stadium n=302 | Elizabeth Quay n=285 | Northbridge n=287 | South Perth n=272 | Victoria Park n=250 | Scarborough n=199 | Subiaco n=191 | Mt Lawley / Highgate n=179 | Leederville n=174 |
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| Shopping | 50 | 30 | 3 | 9 | 11 | 17 | 24 | 16 | 31 | 16 | 16 |
| Have a meal | 42 | 56 | 37 | 40 | 50 | 35 | 59 | 42 | 33 | 51 | 53 |
| Have a coffee | 22 | 30 | 7 | 19 | 13 | 26 | 23 | 28 | 23 | 29 | 17 |
| Go out for a drink | 22 | 23 | 21 | 21 | 35 | 13 | 14 | 19 | 14 | 26 | 20 |
| Event | 17 | 15 | 54 | 18 | 13 | 12 | 5 | 8 | 11 | 8 | 8 |
| Visit a nightclub | 7 | 5 | 2 | 2 | 23 | 3 | 3 | 6 | 3 | 4 | 5 |
| Something else | 13 | 17 | 17 | 27 | 10 | 30 | 11 | 23 | 21 | 13 | 10 |

Aligned with lower recent visitation, intentions to visit Perth CBD and Northbridge have fallen the most since 2017.



Intentions to visit Perth CBD and Northbridge in the next 6 months have dropped the most since 2017.

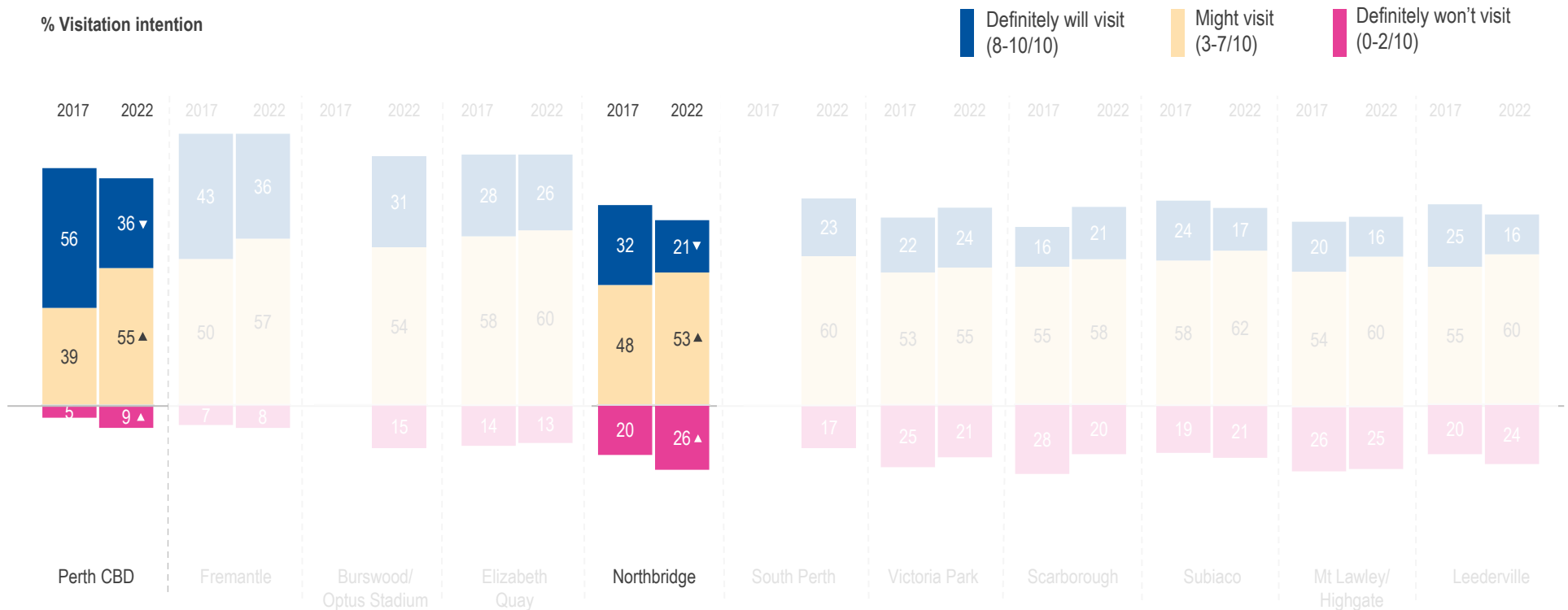
% Visitation intention: Definitely will visit in the next 6 months (8-10/10)



QA6. And thinking now about the near future, how likely are you to visit each of these precincts for leisure in the next 6 months? Base: All Respondents, 2022 (n=821); 2017 (n=606).

This drop is due to more being unsure of visiting – but also more feeling certain that they won't visit.

% Visitation intention

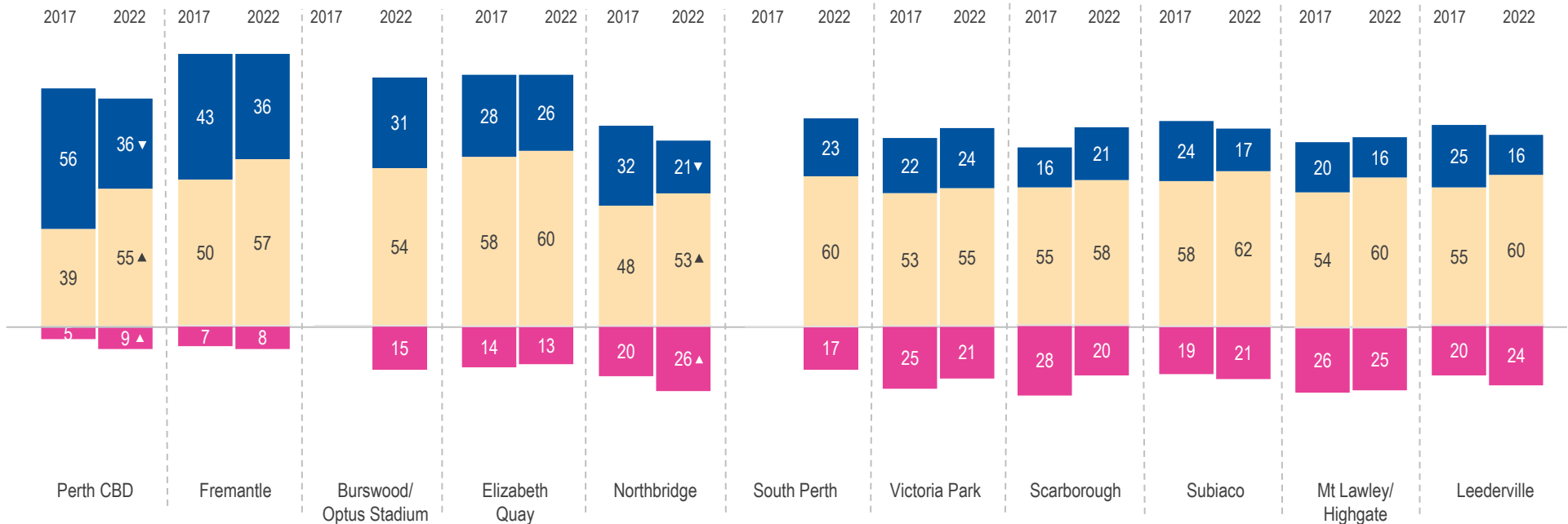


Although more generally, intended visitation to most other precincts remains consistent with 2017...

...which demonstrates that while recent visitation may be lower than what was observed in 2017, there are positive intentions among the WA community to continue getting back out there and enjoying the city.

% Visitation intention

■ Definitely will visit (8-10/10)
■ Might visit (3-7/10)
■ Definitely won't visit (0-2/10)



QA6. And thinking now about the near future, how likely are you to visit each of these precincts for leisure in the next 6 months? Base: All Respondents, 2022 (n=821); 2017 (n=606).

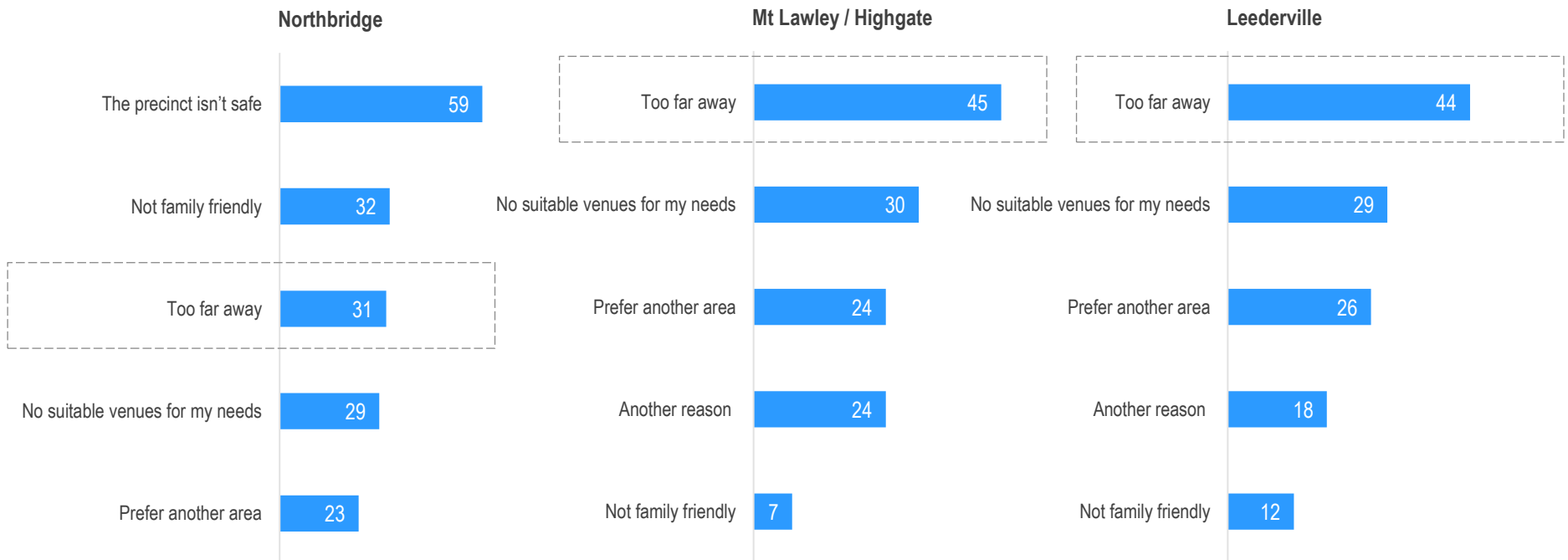
Distance from home and suitability for personal needs are key reasons people won't consider a certain precinct.



Being 'too far away' is one of the top reasons why people will definitely not visit these precincts.

While geographical proximity is difficult to overcome, there are opportunities to address other barriers to improve visitation, such as improving Northbridge's perception of safety, or having more venue types within each precinct to cater to diverse needs.

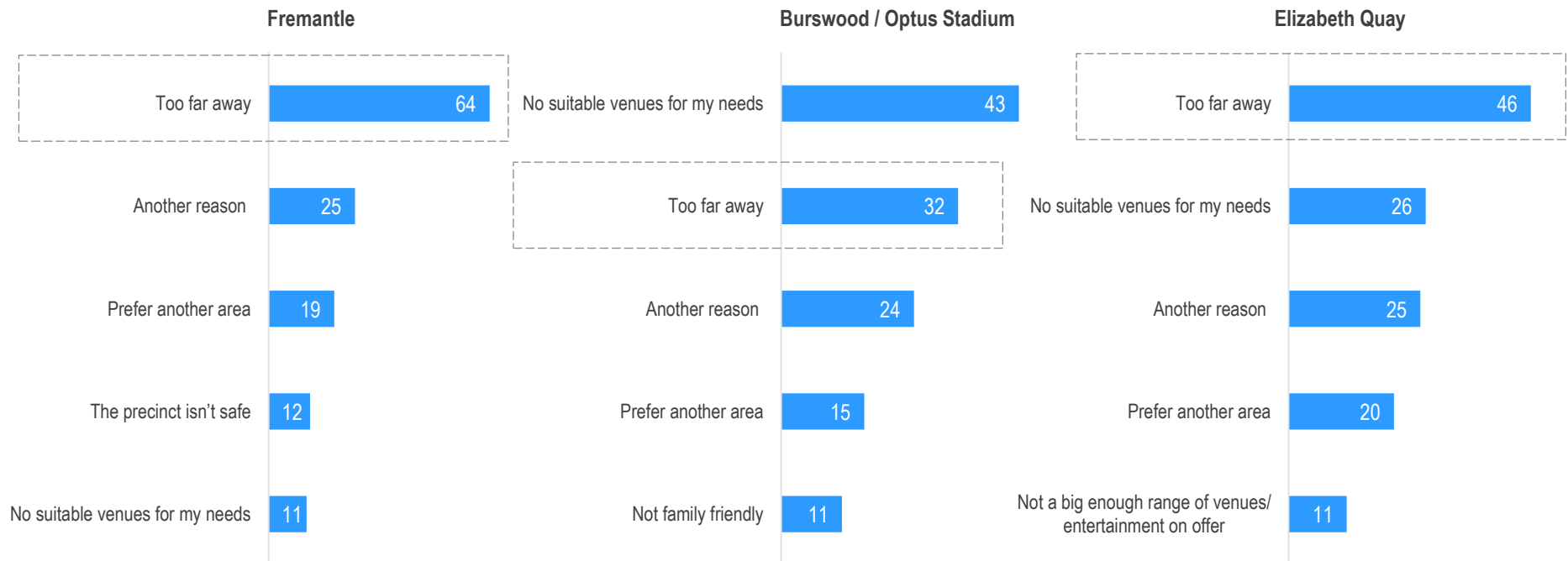
% Reason for no intention to visit



Distance is also a key barrier, even for the highest-rated precincts.

Lack of suitable venues also appears to be a barrier for Burswood and Elizabeth Quay.

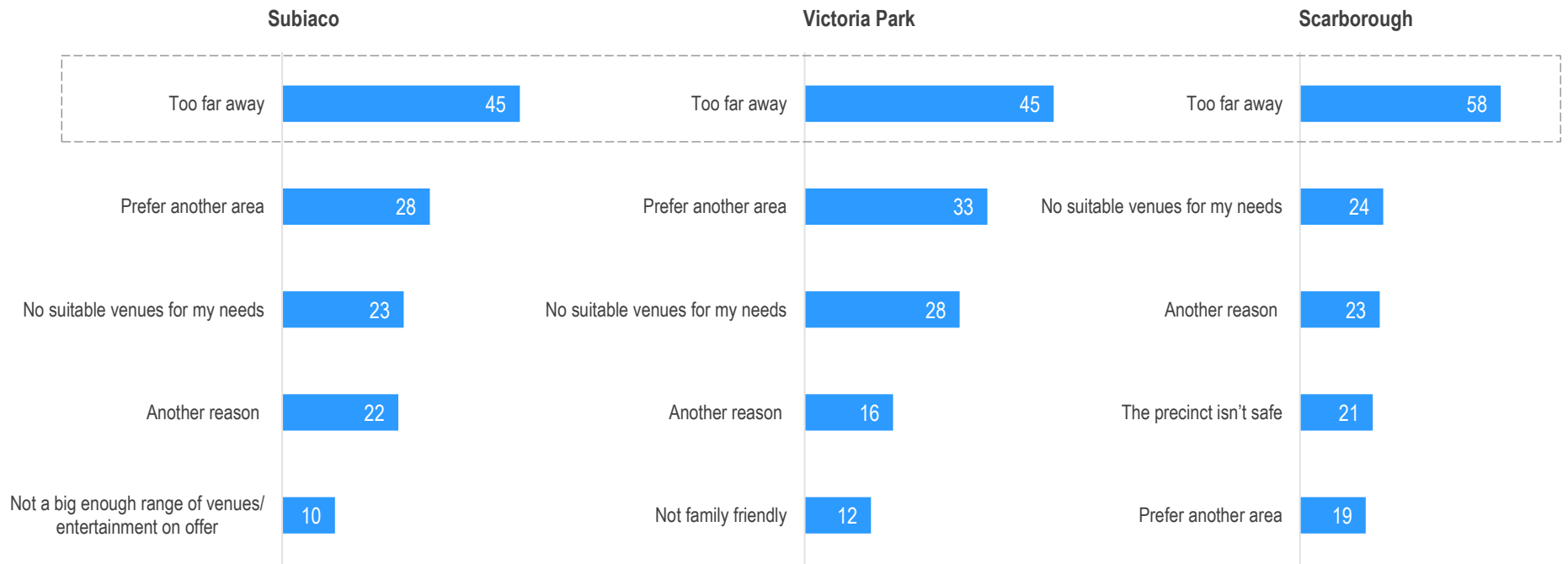
% Reason for no intention to visit



This is also seen in almost all other precincts.

For these three precincts, lack of suitable venues also comes up as one of the top 3 barriers to visitation.

% Reason for no intention to visit

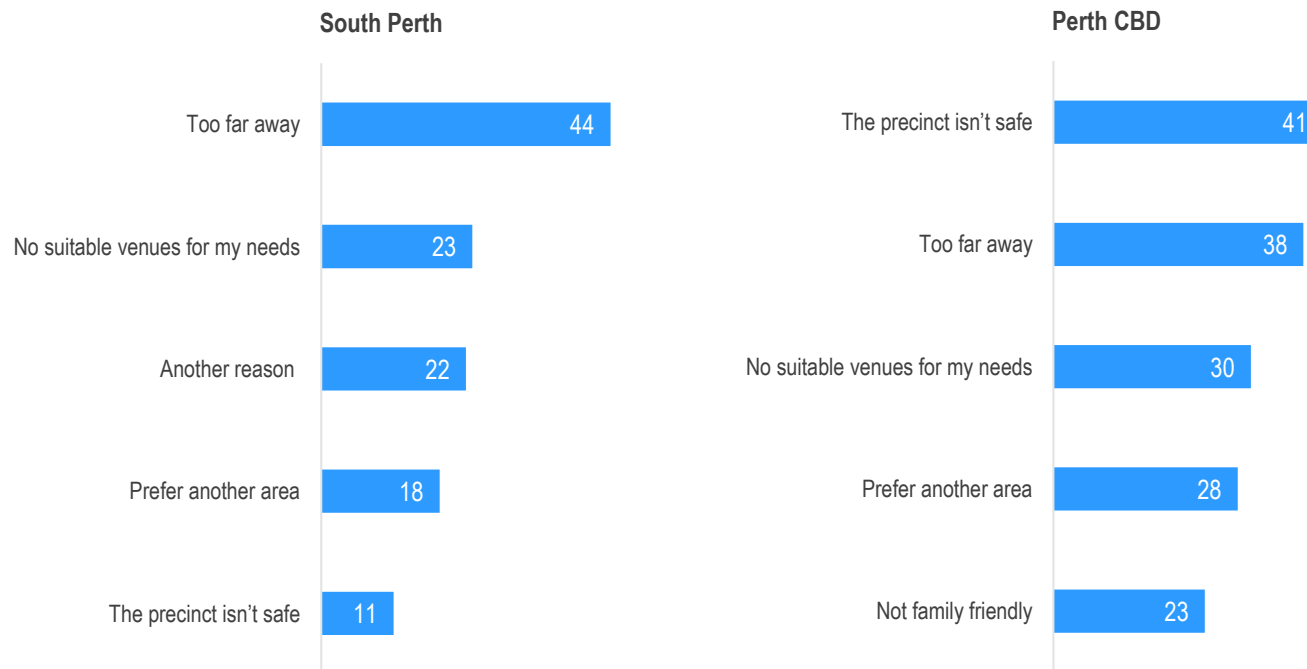


QA7. You mentioned you definitely won't visit these precincts in the next 6 months. Why is that? Base: Definitely won't visit precinct, Subiaco (n=72); Victoria Park (n=72); Scarborough (n=71). *Only top 5 response charted

Those who have no intention to visit Perth CBD mention that its due to a perceived lack of safety.

Once again, suitability of venue types and distance remains the top 3 barriers to visitation.

% Reason for no intention to visit



Across all precincts, people tend to spend more on food and drinks than any other category.



At a glance, visitors to Fremantle, the CBD, Elizabeth Quay and Northbridge spend the most.

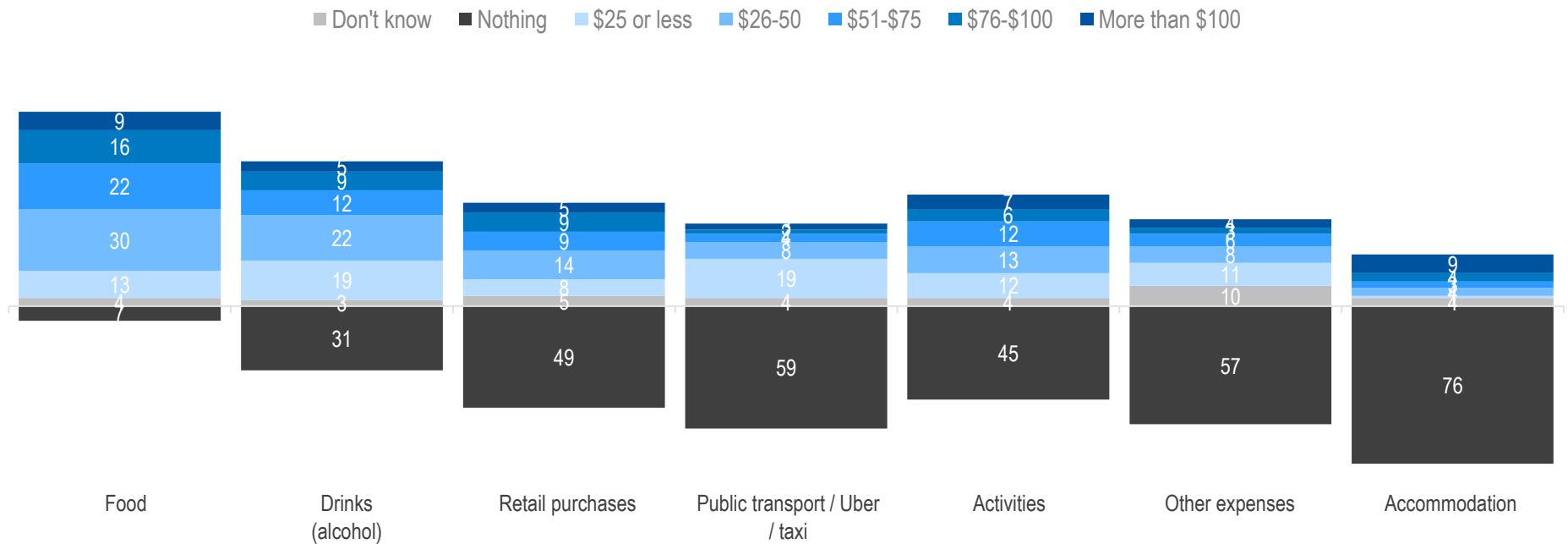
These precincts have more than half of their visitors spending on 4 different categories – with the overall economic impact of the CBD likely the highest due to it being the most visited, as well as most frequently visited precinct.

In terms of what they're spending their money on, there are more visitors who spend on food and drinks across all precincts, compared to those who don't.

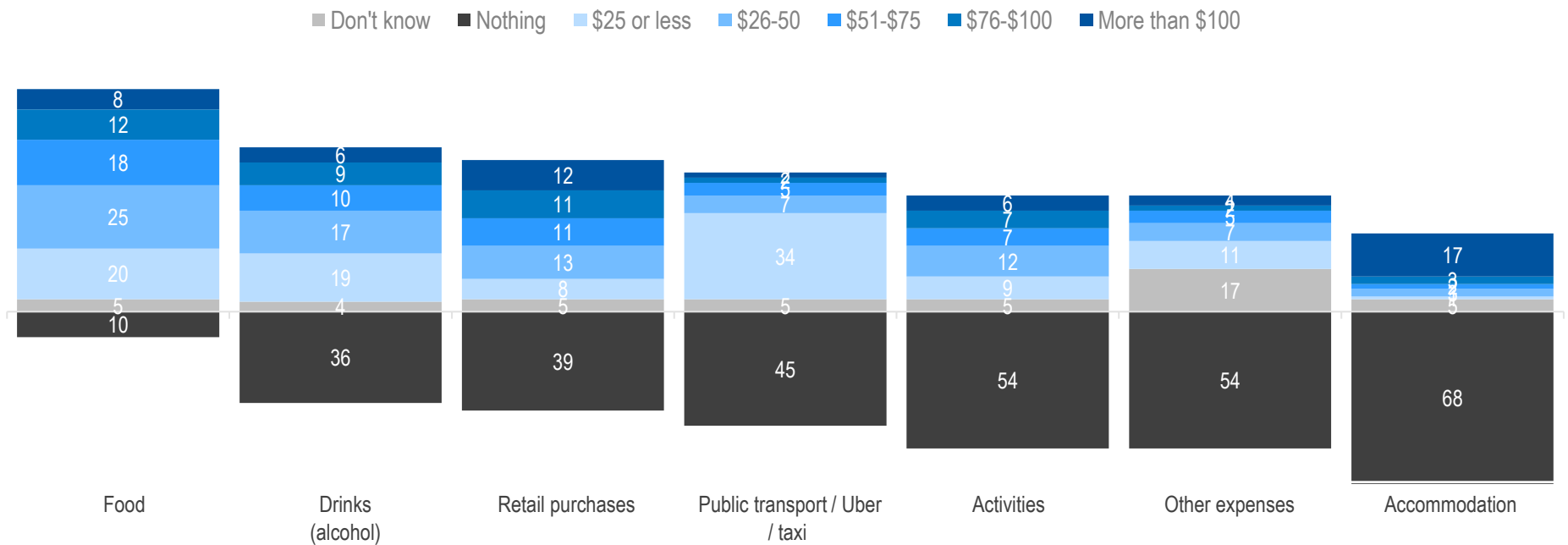
■ More than half spent on category
■ More than half did not spend on category

| | Perth CBD n=303 | | Fremantle n=235 | | Burswood/ Optus Stadium n=167 | | Elizabeth Quay n=152 | | Northbridge n=161 | | South Perth n=157 | | Victoria Park n=127 | | Scarborough n=108 | | Subiaco n=108 | | Mt Lawley / Highgate n=99 | | Leederville n=99 | |
|----------------------|--------------------|-----------------|--------------------|-----------------|--|-----------------|----------------------------|-----------------|----------------------|-----------------|----------------------|-----------------|------------------------|-----------------|----------------------|-----------------|------------------|-----------------|---------------------------------|-----------------|---------------------|-----------------|
| Food | 90% spend | 10% no spend | 93% spend | 7% no spend | 90% spend | 10% no spend | 85% spend | 15% no spend | 90% spend | 10% no spend | 86% spend | 14% no spend | 90% spend | 10% no spend | 93% spend | 7% no spend | 86% spend | 14% no spend | 91% spend | 9% no spend | 92% spend | 8% no spend |
| Transport | 55% spend | 45% no spend | 41% spend | 59% no spend | 42% spend | 58% no spend | 55% spend | 45% no spend | 59% spend | 41% no spend | 38% spend | 62% no spend | 35% spend | 65% no spend | 37% spend | 63% no spend | 40% spend | 60% no spend | 51% spend | 49% no spend | 50% spend | 50% no spend |
| Accoms | 32% spend | 68% no spend | 24% spend | 76% no spend | 32% spend | 68% no spend | 32% spend | 68% no spend | 24% spend | 76% no spend | 26% spend | 74% no spend | 24% spend | 76% no spend | 29% spend | 71% no spend | 25% spend | 75% no spend | 31% spend | 69% no spend | 23% spend | 77% no spend |
| Drinks (alcohol) | 66% spend | 36% no spend | 69% spend | 31% no spend | 77% spend | 23% no spend | 60% spend | 40% no spend | 73% spend | 27% no spend | 55% spend | 45% no spend | 52% spend | 48% no spend | 62% spend | 38% no spend | 62% spend | 38% no spend | 70% spend | 30% no spend | 62% spend | 38% no spend |
| Activities | 46% spend | 54% no spend | 55% spend | 45% no spend | 65% spend | 35% no spend | 54% spend | 46% no spend | 58% spend | 42% no spend | 53% spend | 47% no spend | 35% spend | 65% no spend | 42% spend | 58% no spend | 47% spend | 53% no spend | 47% spend | 53% no spend | 39% spend | 61% no spend |
| Retail purchases | 61% spend | 39% no spend | 51% spend | 49% no spend | 28% spend | 72% no spend | 46% spend | 54% no spend | 43% spend | 57% no spend | 45% spend | 55% no spend | 48% spend | 52% no spend | 37% spend | 63% no spend | 46% spend | 54% no spend | 44% spend | 56% no spend | 38% spend | 62% no spend |
| Any other expense | 46% spend | 54% no spend | 43% spend | 57% no spend | 34% spend | 66% no spend | 43% spend | 57% no spend | 44% spend | 56% no spend | 45% spend | 55% no spend | 35% spend | 65% no spend | 38% spend | 62% no spend | 36% spend | 64% no spend | 44% spend | 56% no spend | 39% spend | 61% no spend |

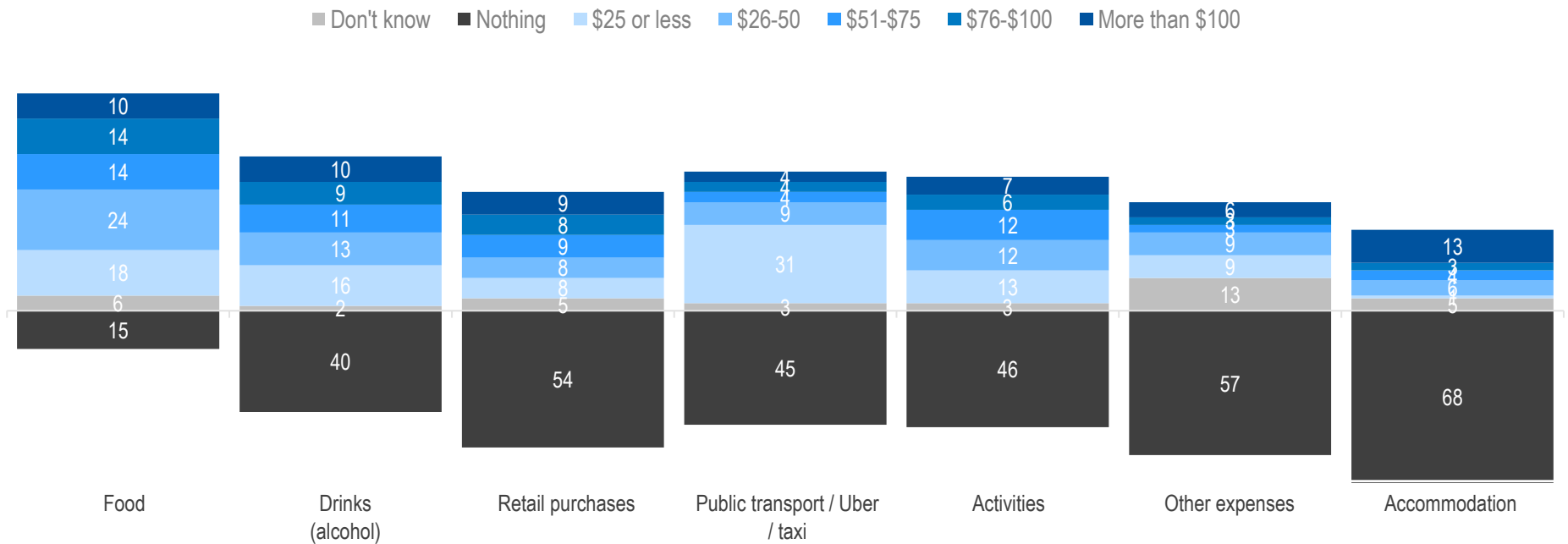
Spend by precinct: Fremantle



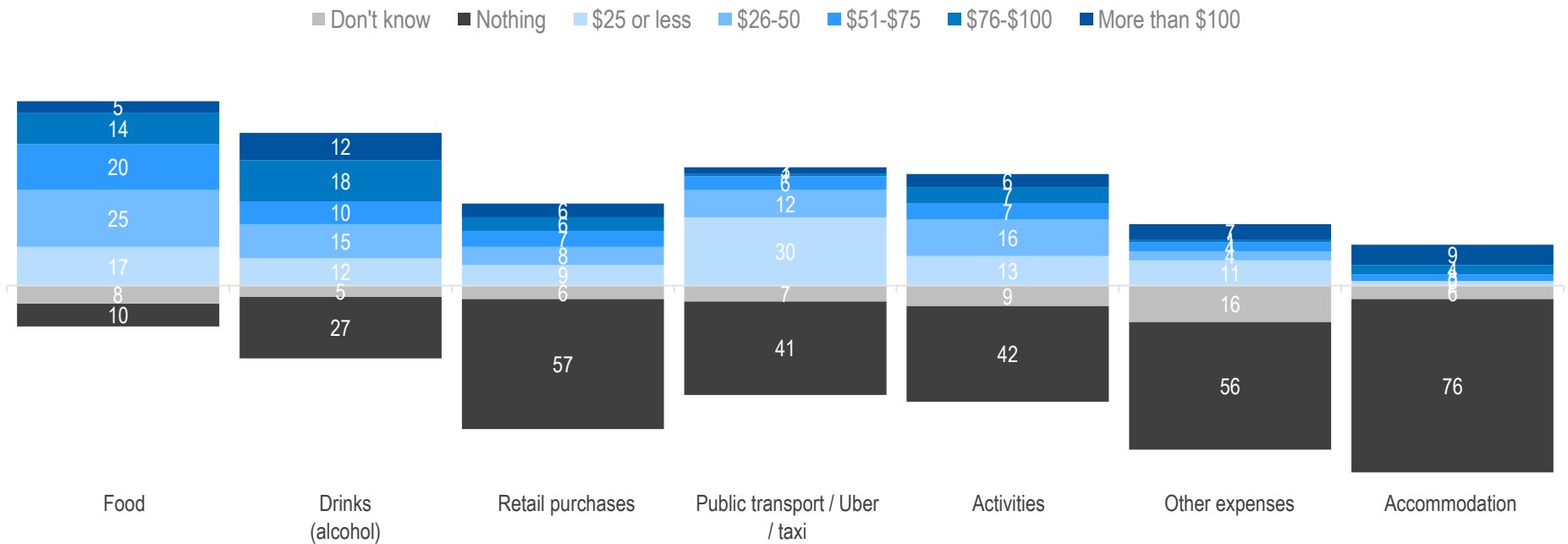
Spend by precinct: Perth CBD



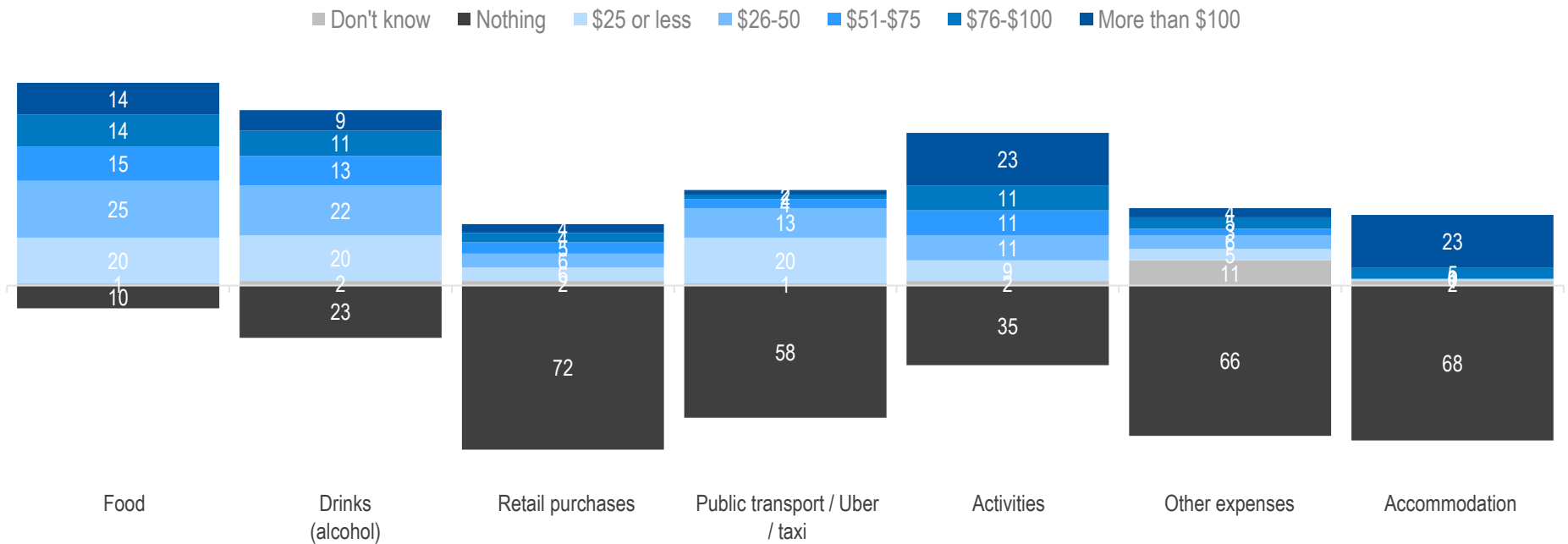
Spend by precinct: Elizabeth Quay



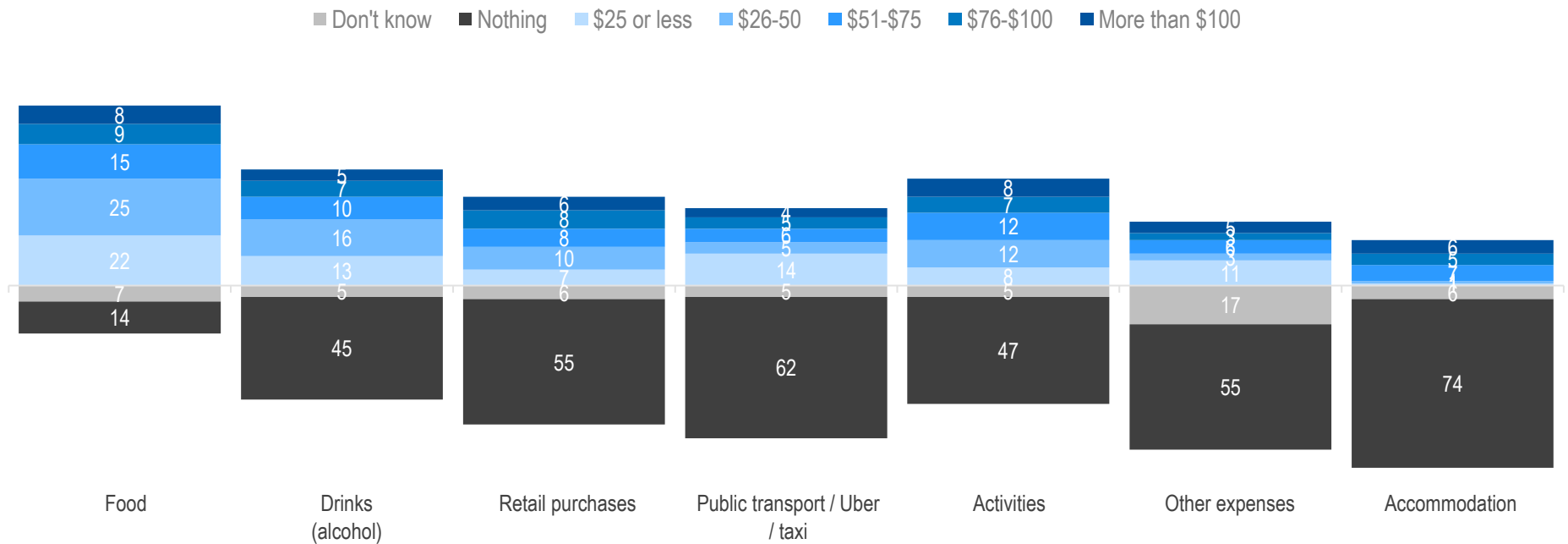
Spend by precinct: Northbridge



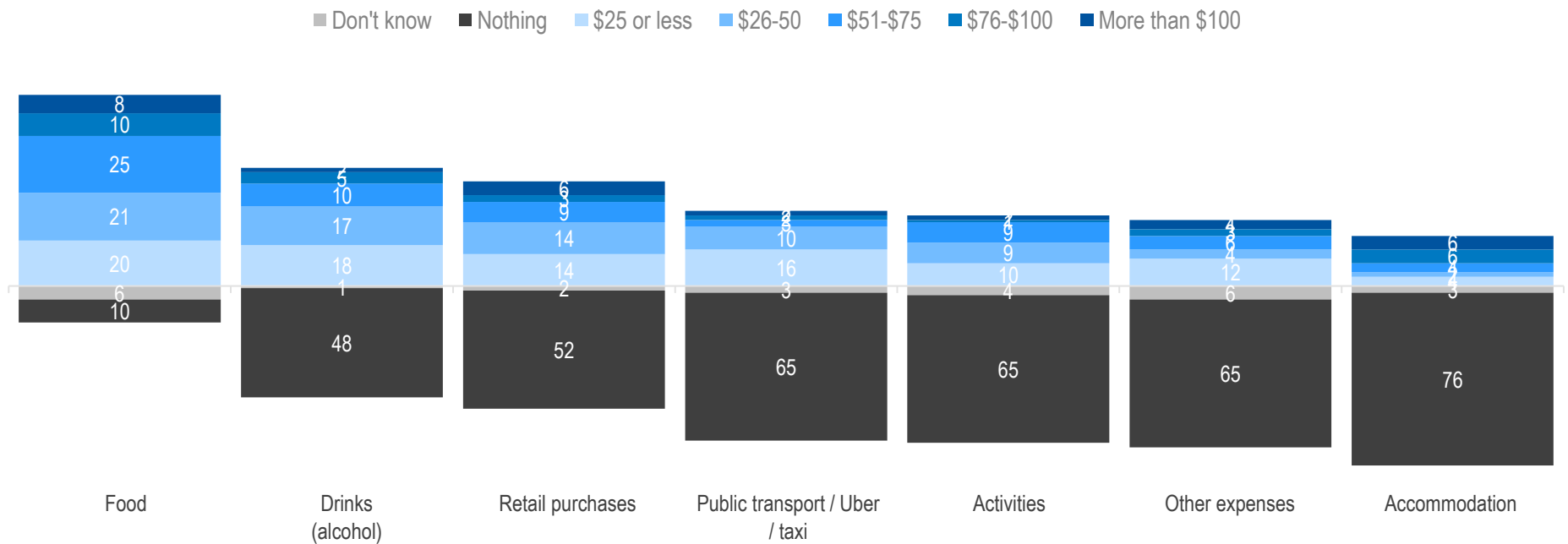
Spend by precinct: Burswood / Optus Stadium



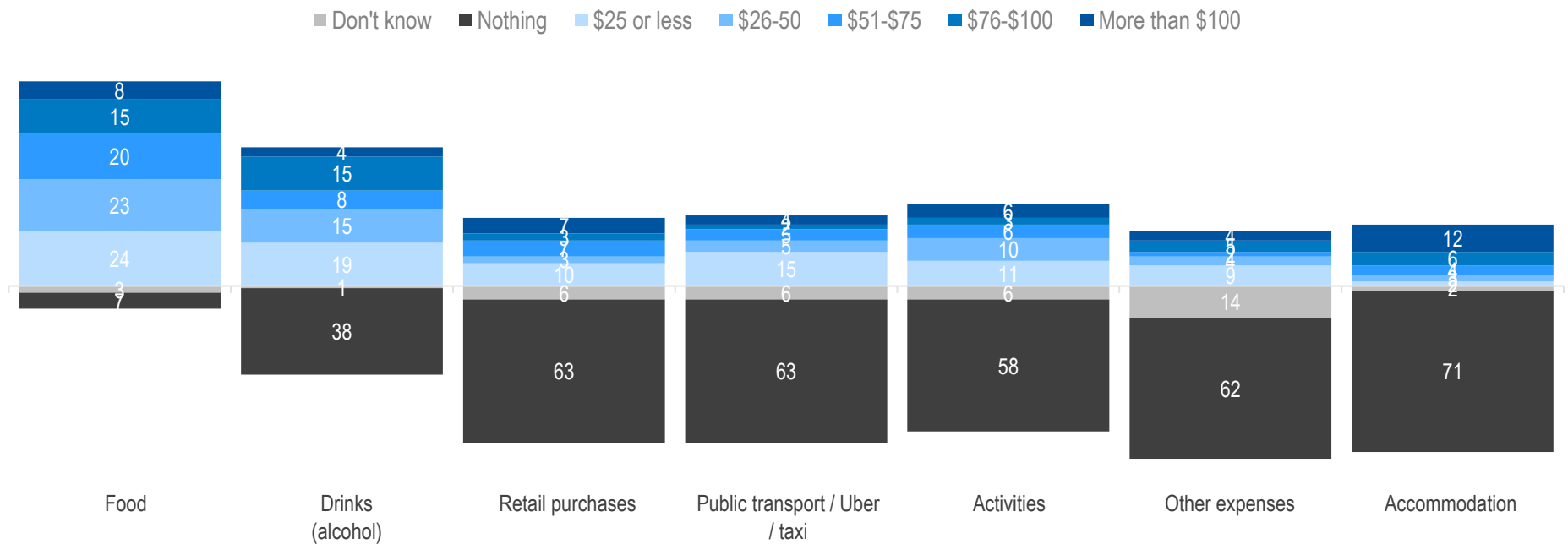
Spend by precinct: South Perth



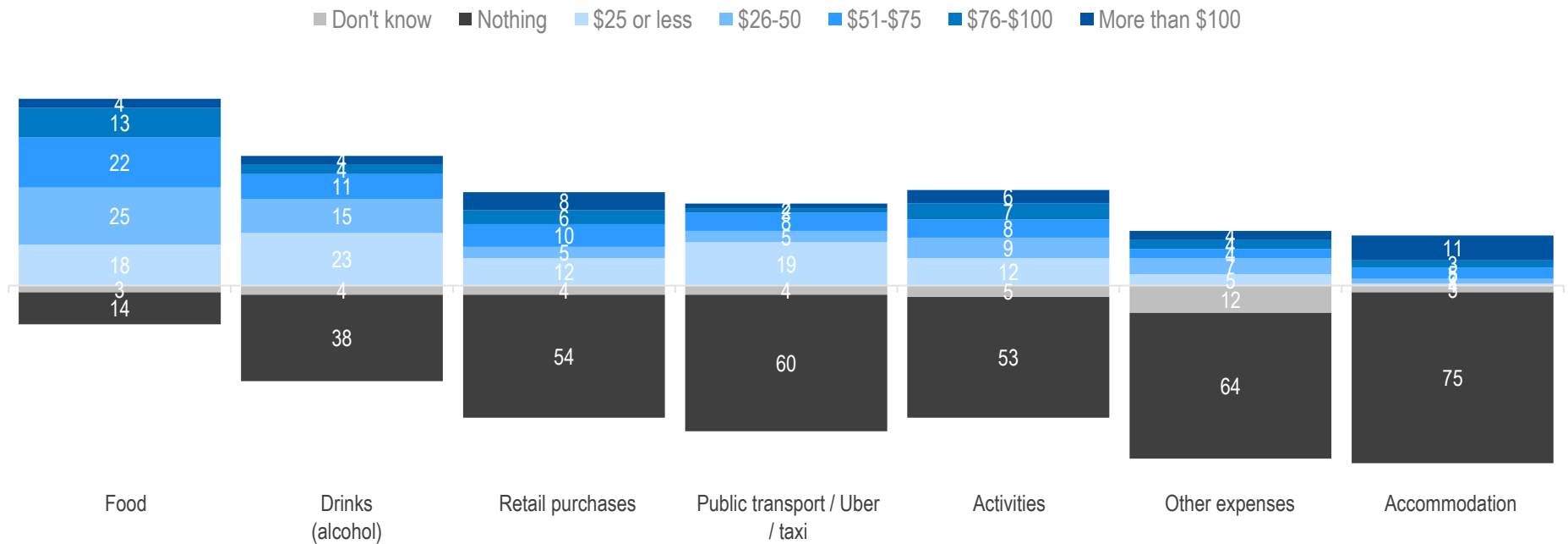
Spend by precinct: Victoria Park



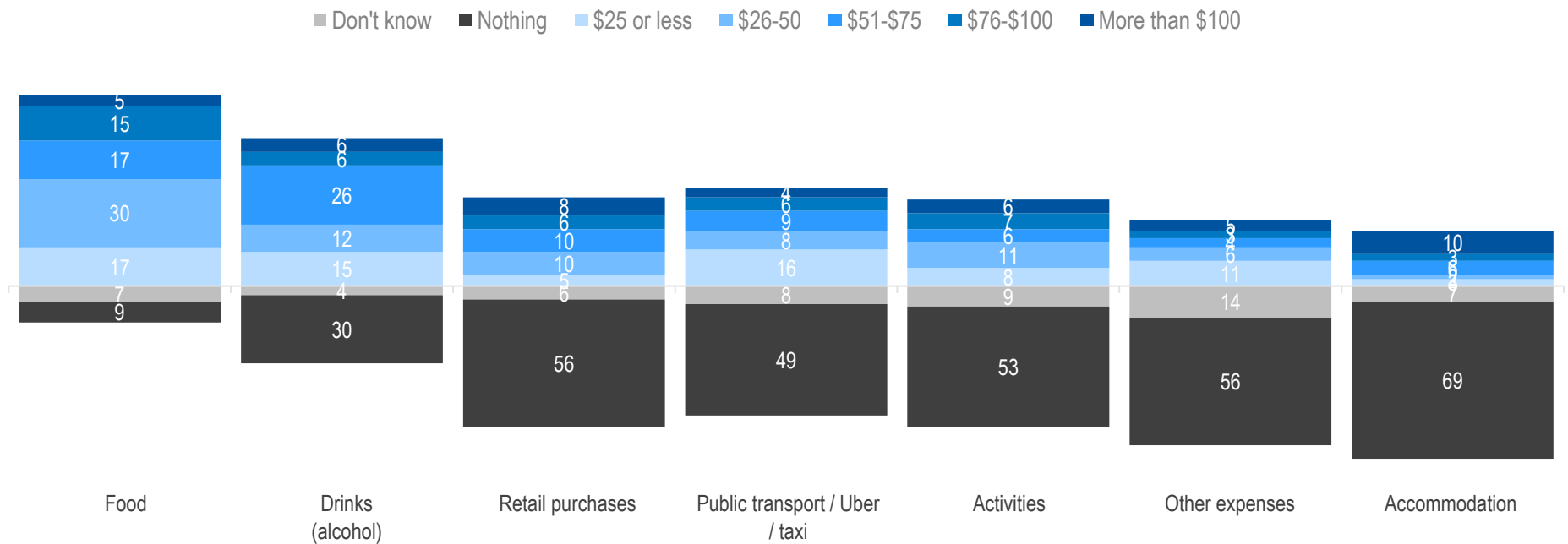
Spend by precinct: Scarborough



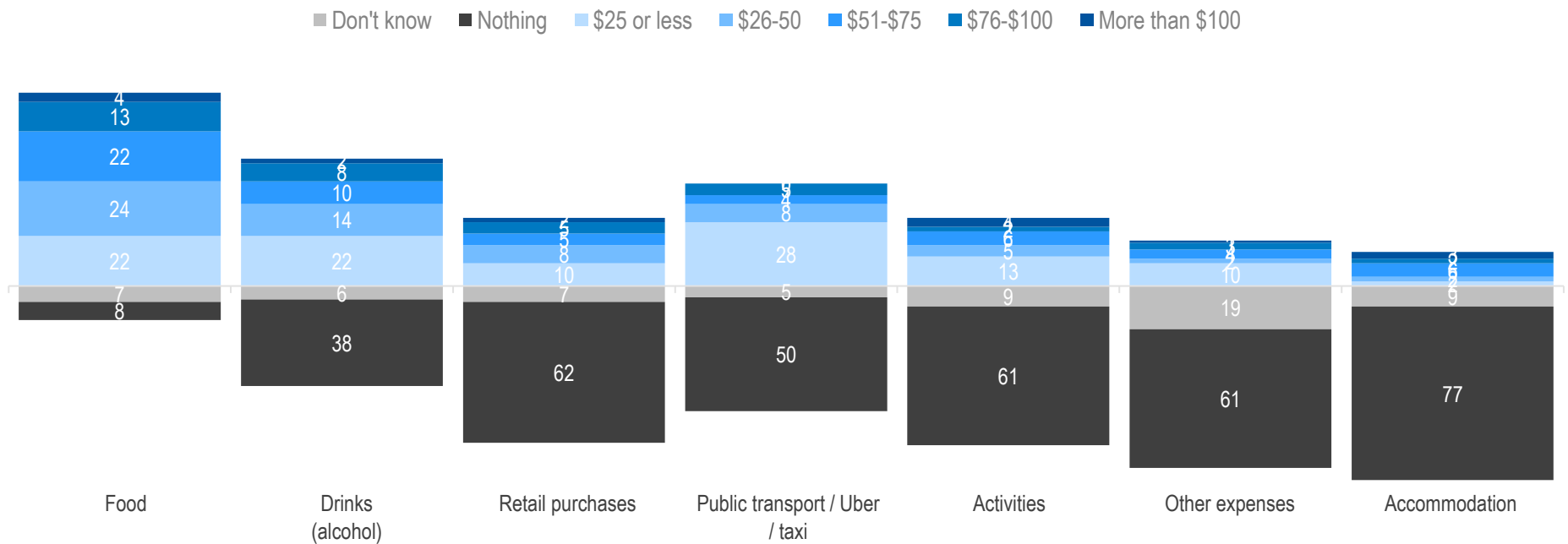
Spend by precinct: Subiaco



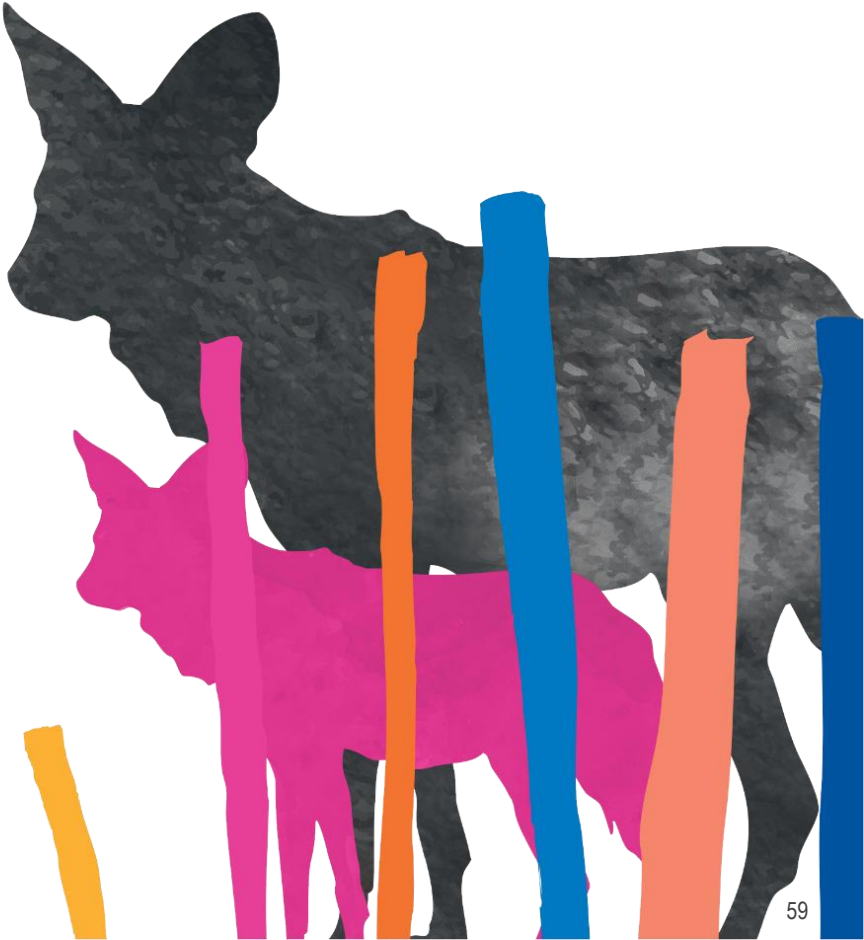
Spend by precinct: Mt Lawley / Highgate



Spend by precinct: Leederville



Entertainment Precincts: Visitor Profiles



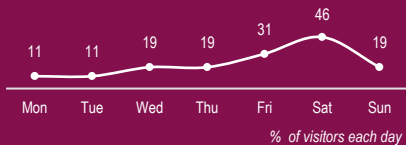


Perth CBD

#1 ^{most} Visited

56% visited in the last 6 months

- 39% of visitors during the morning, 58% during the afternoon, 39% during the evening
- Top 3 locations: 39% of visitors from the southern suburbs, 26% from the northern suburbs, 11% from Southwest & Great Southern



#4 ^{most} Favoured

6.5 / 10 overall opinion rating
7 / 10 in 2017

Accessible

Perth CBD is seen as the most accessible entertainment precinct, with 3 in 4 describing the precinct as "easily accessible by public transport" and 3 in 5 describing it as "having taxis and Ubers readily available".

Shop 'til you drop!

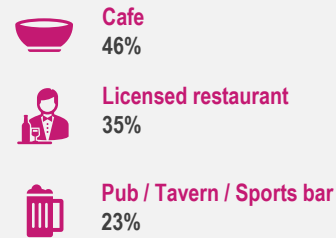
Perth CBD is known for its shopping – with half mentioning that they visited the precinct to shop.

Purpose of last visit



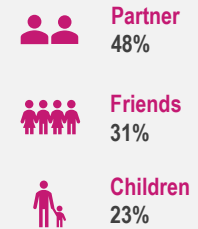
Base: Visited in the last 6 months n=460

Venues visited



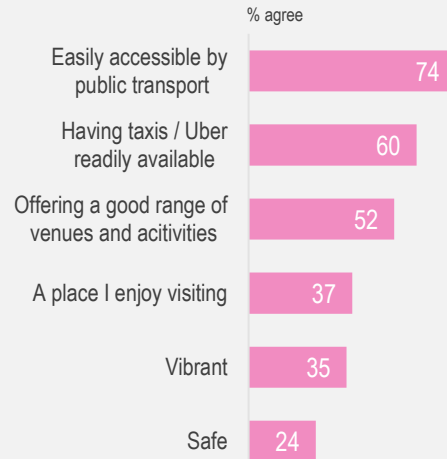
Base: Visited in the last 6 months n=460

Travel party



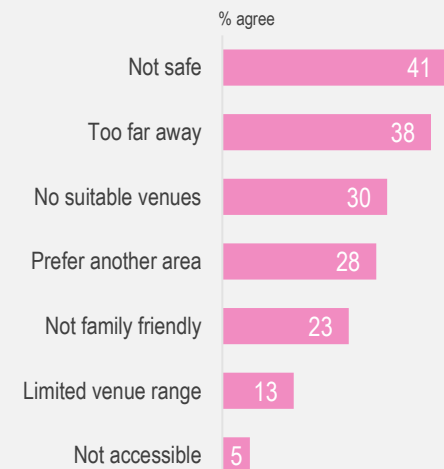
Base: Visited in the last 6 months n=460

Perceptions



Base: All Respondents n=821

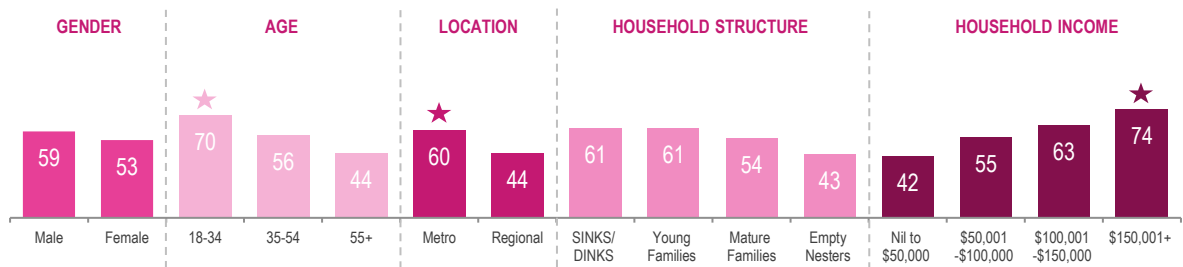
Barriers to visitation



Base: Definitely won't visit n=35

Visitation: Past 6 months

Base: All respondents n=821



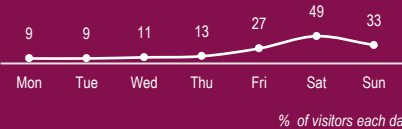


Fremantle

most
#2 Visited

46% visited in the last 6 months

- 41% during the morning, 63% during the afternoon, 30% during the night
- Top 3 locations: 49% from southern suburbs, 21% from northern suburbs, 10% from Southwest & Great Southern



most
#1 Favoured

7.1/10 overall rating
7.3/10 in 2017

WA's favourite

As the most favoured and second most visited precinct, Fremantle is known for its coffee and café culture. It is well liked because there are many things to do there, and is perceived as the most vibrant, safe and enjoyable precinct in Perth.

Money on meals

Spending is also high in Fremantle, particularly on food. Close to half of those who visit Fremantle spend more than \$50 on food. As such, Fremantle is not only the most visited, but visitation to the precinct also contributes greatly to the local economy.

Purpose of last visit

Have a meal
56%

Shopping
30%

Have a coffee
30%

Base: Visited in the last 6 months n=378

Venues visited

Cafe
45%

Licensed restaurant
34%

Pub / Tavern / Sports bar
28%

Base: Visited in the last 6 months n=378

Travel party

Partner
53%

Friends
34%

Children
28%

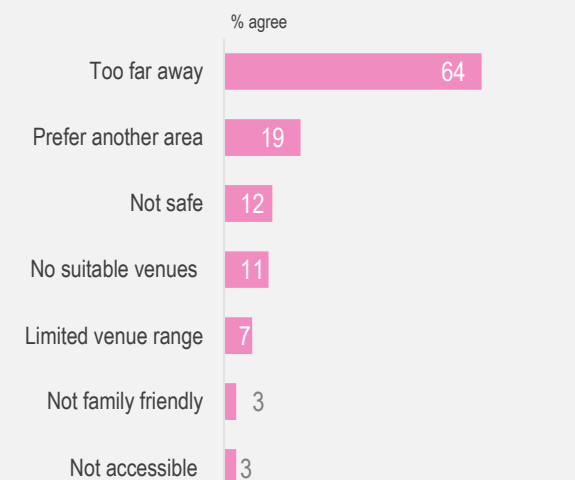
Base: Visited in the last 6 months n=378

Perceptions



Base: All Respondents n=821

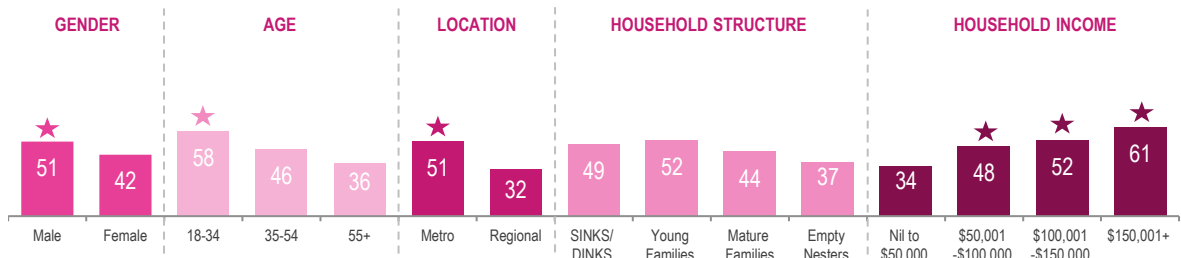
Barriers to visitation



Base: Definitely won't visit n=33

Visitation: Past 6 months

Base: All respondents n=821



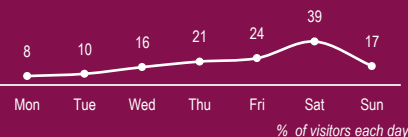


Burswood / Optus Stadium

most
#3 Visited

37% visited in the last 6 months

- 20% during the morning, 53% during the afternoon, 62% during the night
- Top 3 locations: 36% from southern suburbs, 29% from northern suburbs, 8% from Southwest & Great Southern



most
#2 Favoured

6.8/10 overall rating

Events & big spenders

Known for being a place of enjoyment, as well as for its safety and availability of Ubers, Burswood / Optus Stadium is the go-to precinct in Perth for events, with more than half of those visiting the area mentioning so; and licensed restaurants are seen as the most suitable venue type for this precinct.

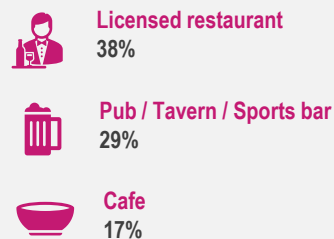
Spending is the highest in this precinct, with around 1 in 4 who visit Burswood/ Optus Stadium spending more than \$100 on activities and accommodation. The precinct also has the highest proportion of visitors who spend \$100+ on food, compared to the other precincts.

Purpose of last visit



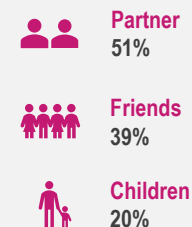
Base: Visited in the last 6 months n=302

Venues visited



Base: Visited in the last 6 months n=302

Travel party



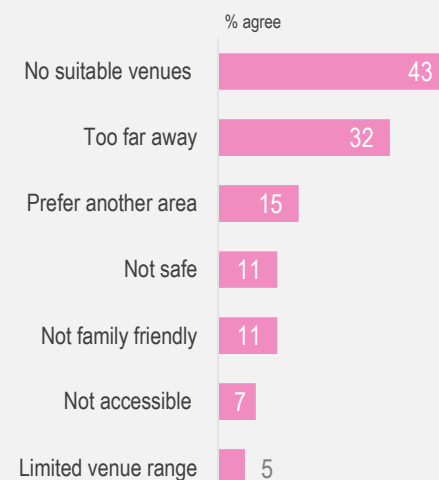
Base: Visited in the last 6 months n=302

Perceptions



Base: All Respondents n=821

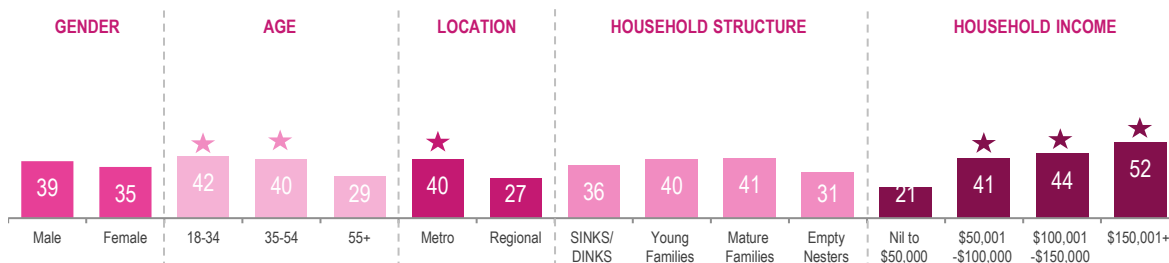
Barriers to visitation



Base: Definitely won't visit n=57

Visitation: Past 6 months

Base: All respondents n=821



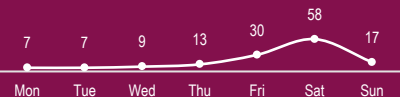


Northbridge

most
#4 Visited

35% visited in the last 6 months

- 17% during the morning, 37% during the afternoon, 65% during the night
- Top 3 locations: 35% from southern suburbs, 30% from northern suburbs, 10% from Southwest & Great Southern



% of visitors each day

most
#11 Favoured

5.2/10 overall rating
6.3/10 in 2017

Room to
improve

Compared to other precincts, the WA community holds the poorest perceptions of – a sharp drop from third place in 2017. It is described as the least enjoyable and least safe precinct to visit. However despite this, Northbridge is still the 4th most visited precinct in Perth.

Bustling
nightlife

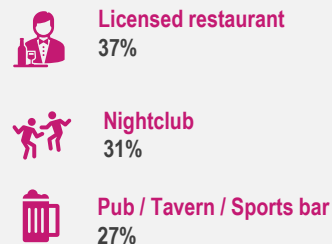
Northbridge is the precinct that experiences the highest proportion of visitation at night, and is known for its night activities amongst other precincts – particularly for nightclubs and drinks.

Purpose of last visit



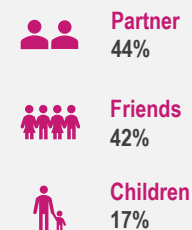
Base: Visited in the last 6 months n=287

Venues visited



Base: Visited in the last 6 months n=287

Travel party



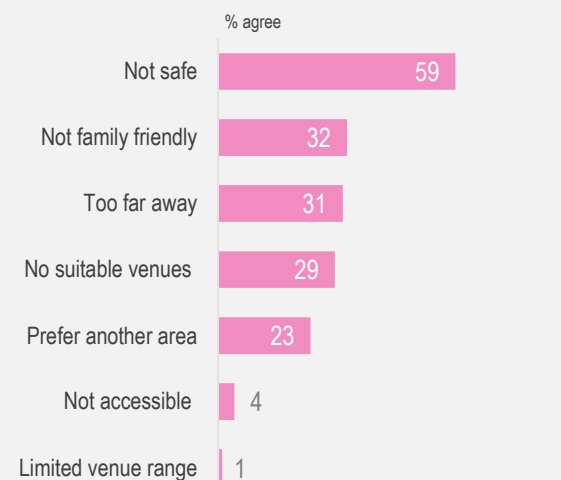
Base: Visited in the last 6 months n=287

Perceptions



Base: All Respondents n=821

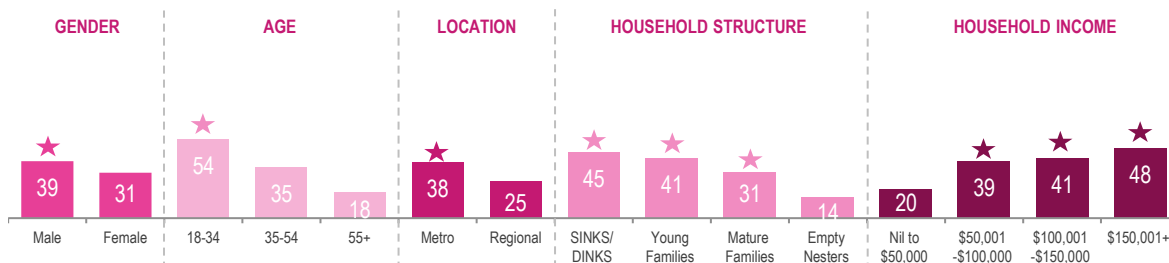
Barriers to visitation



Base: Definitely won't visit n=102

Visitation: Past 6 months

Base: All respondents n=821



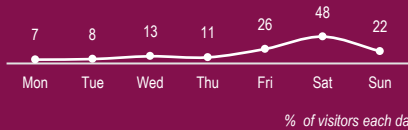


Elizabeth Quay

most
#5 Visited

35% visited in the last 6 months

- 33% during the morning, 60% during the afternoon, 36% during the night
- Top 3 locations: 41% from southern suburbs, 25% from northern suburbs, 10% from Southwest & Great Southern



most
#3 Favoured

6.6/10 overall rating
6/10 in 2017

Improved perceptions

More WA residents rate Elizabeth Quay favourably, compared to 2017. In particular, Elizabeth Quay is now perceived by more to be offering a good range of venues and activities, with positive mentions of good food options and cleanliness.

Food, glorious food

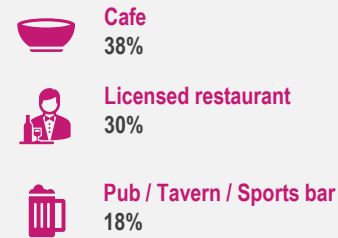
More than half of visitors to Elizabeth Quay spend on across 4 different categories – but with dining out being the most popular activity in the precinct, it is no surprise that 9 in 10 who visit Elizabeth Quay spend on food. 1 in 10 of those who visit spend more than \$100 on food.

Purpose of last visit



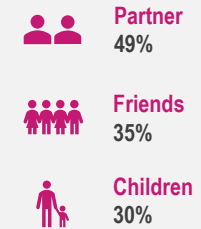
Base: Visited in the last 6 months n=285

Venues visited



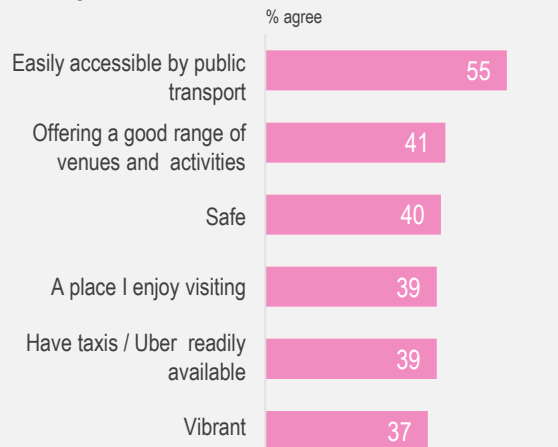
Base: Visited in the last 6 months n=285

Travel party



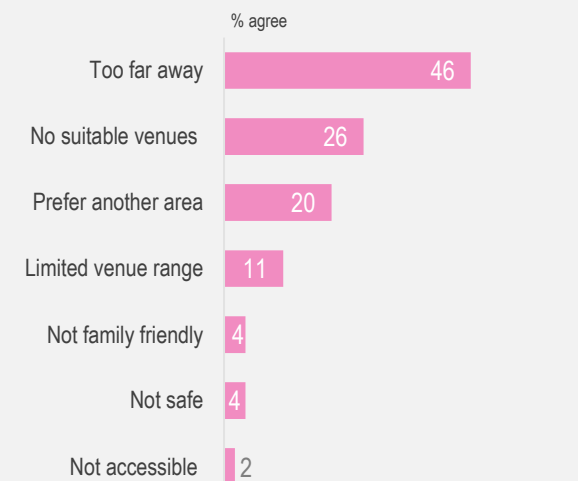
Base: Visited in the last 6 months n=285

Perceptions



Base: All Respondents n=821

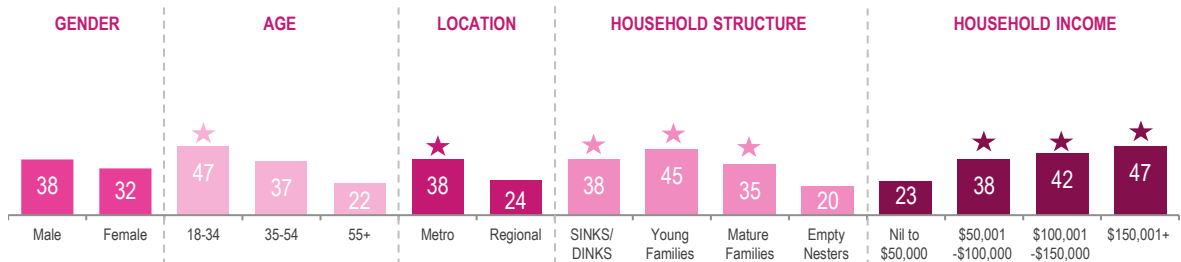
Barriers to visitation



Base: Definitely won't visit n=53

Visitation: Past 6 months

Base: All respondents n=821



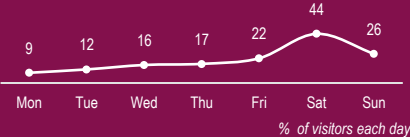


South Perth

most
#6 Visited

33% visited in the last 6 months

- 42% during the morning, 62% during the afternoon, 24% during the night
- Top 3 locations: 40% from southern suburbs, 19% from northern suburbs, 15% from South West & Great Southern



most
#6 Favoured

6.1/10 overall rating

Hunger for cafes

With a reputation for being a safe precinct, South Perth is also mainly visited for its cafes.

Cafes are the most visited venue type for those who have visited South Perth in the past 6 months. In fact, visitation for licensed restaurants (second most popular in the precinct) is only half that of cafes.

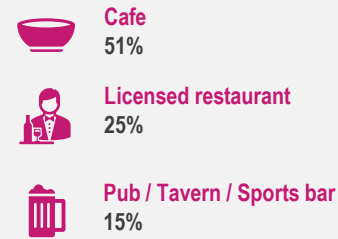
Cafes are also deemed the most suitable and in-demand venue type for the area, with residents wanting to see more of them in the precinct.

Purpose of last visit



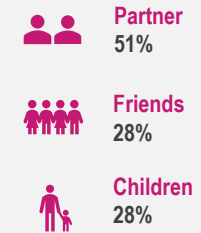
Base: Visited in the last 6 months n=272

Venues visited



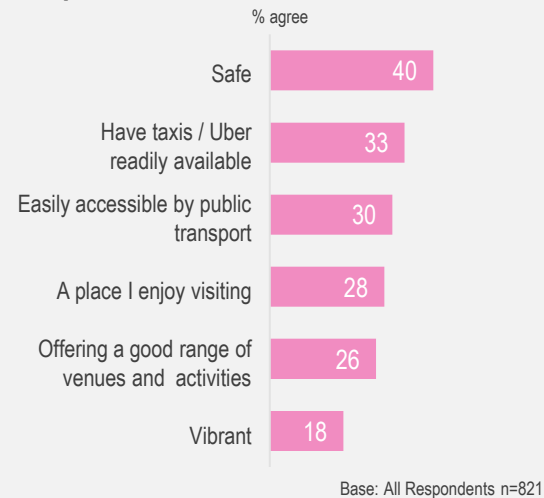
Base: Visited in the last 6 months n=272

Travel party



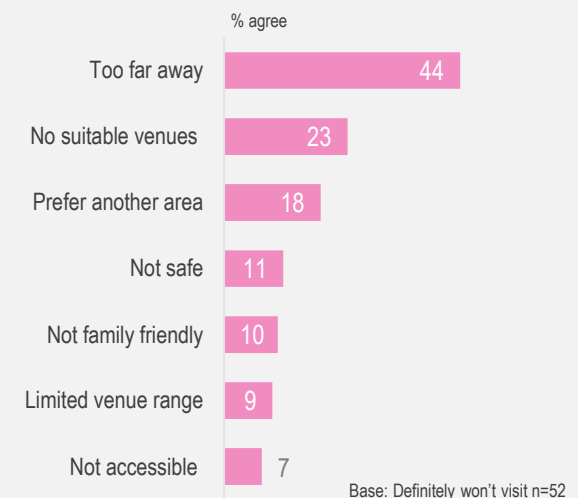
Base: Visited in the last 6 months n=272

Perceptions



Base: All Respondents n=821

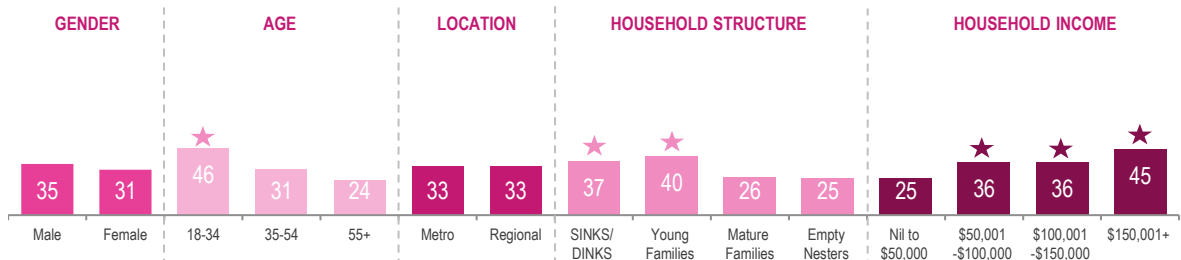
Barriers to visitation



Base: Definitely won't visit n=52

Visitation: Past 6 months

Base: All respondents n=821



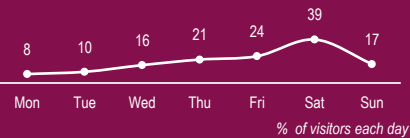


Victoria Park

most
#7 Visited

30% visited in the last 6 months

- 27% during the morning, 54% during the afternoon, 44% during the night
- Top 3 locations: 36% from southern suburbs, 29% from northern suburbs, 8% from Southwest & Great Southern



most
#8 Favoured

5.8/10 overall rating
5.7/10 in 2017

Repeat visitation

Despite being the 7th most visited precinct, a quarter of those who visit the precinct have visited more than four times recently, making it the second most popular precinct in terms of repeat visitation, just behind the Perth CBD.

Foodie paradise

Victoria Park is most known for its food offerings – with 3 in 5 of those who visit the precinct mentioning that it is to dine out for a meal.

Purpose of last visit

Have a meal
59%

Shopping
23%

Have a coffee
23%

Base: Visited in the last 6 months n=250

Venues visited

Cafe
44%

Licensed restaurant
31%

Pub / Tavern / Sports bar
20%

Base: Visited in the last 6 months n=250

Travel party

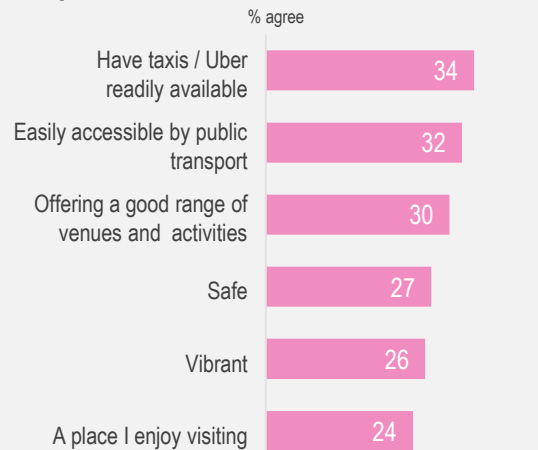
Partner
48%

Friends
42%

Children
23%

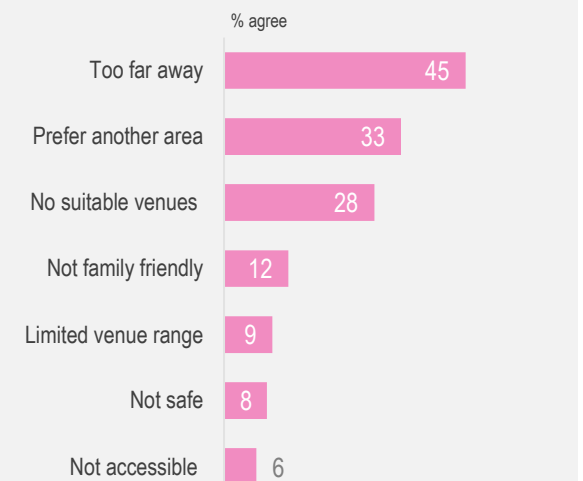
Base: Visited in the last 6 months n=250

Perceptions



Base: All Respondents n=821

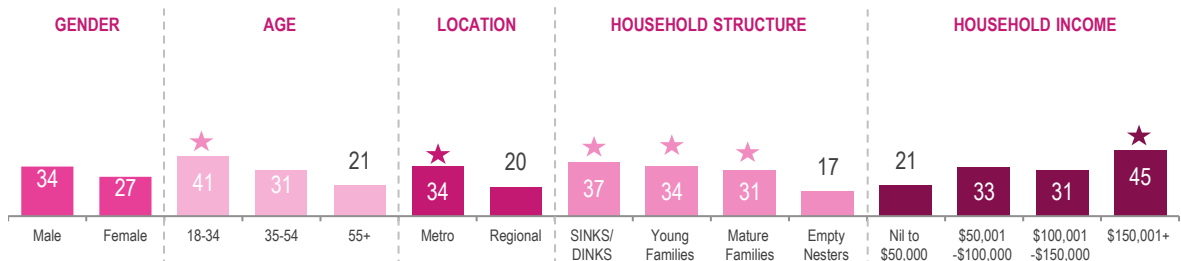
Barriers to visitation



Base: Definitely won't visit n=72

Visitation: Past 6 months

Base: All respondents n=821



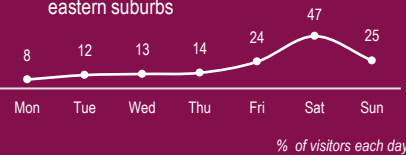


Scarborough

most
#8 Visited

24% visited in the last 6 months

- 40% during the morning, 57% during the afternoon, 32% during the night
- Top 3 locations: 42% from northern suburbs, 31% from southern suburbs, 7% from eastern suburbs



most
#5 Favoured

6.1/10 overall rating
5.3/10 in 2017

Improved perceptions

While most other precincts saw a drop in favourability compared to 2017, perceptions of Scarborough have increased. More now see Scarborough as a vibrant precinct offering a good range of venues and activities

Make more accessible

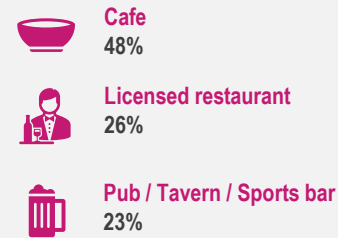
Scarborough is however still perceived as the least accessible precinct by public transport. Interestingly, visitation intention towards Scarborough increased significantly compared to 2017, suggesting that finding ways to make the precinct more accessible may translate to a boost in future visitation.

Purpose of last visit



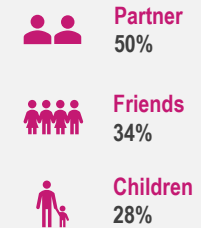
Base: Visited in the last 6 months n=199

Venues visited



Base: Visited in the last 6 months n=199

Travel party



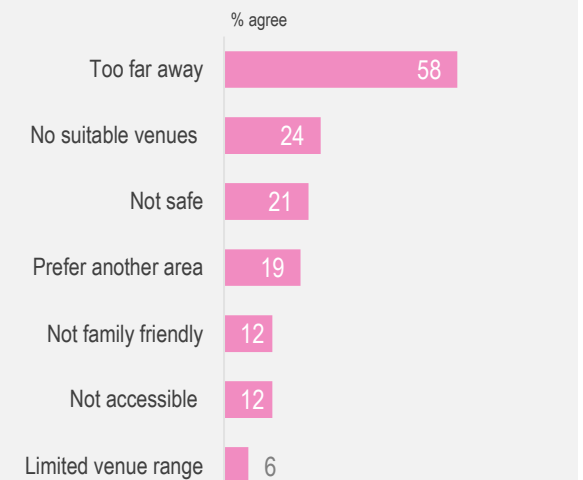
Base: Visited in the last 6 months n=199

Perceptions



Base: All Respondents n=821

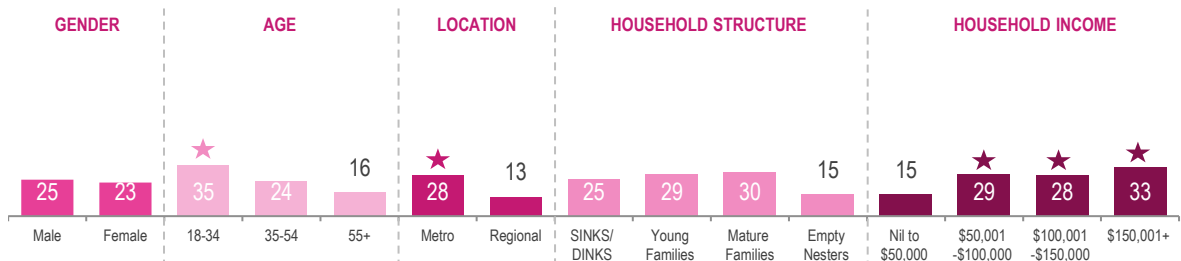
Barriers to visitation



Base: Definitely won't visit n=71

Visitation: Past 6 months

Base: All respondents n=821



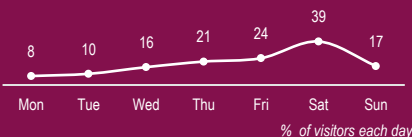


Subiaco

most
#9 Visited

23% visited in the last 6 months

- 32% during the morning, 60% during the afternoon, 25% during the night
- Top 3 locations: 36% from southern suburbs, 29% from northern suburbs, 8% from Southwest & Great Southern



most
#7 Favoured

5.8/10 overall rating
6.1/10 in 2017

Subiaco is rated in the middle of the pack – it is neither the most or least visited, and is also neither favoured the most or least. People feel indifferent towards it.

While the precinct's most positive perception is that it is easily accessible by public transport, about half of those who mention they definitely will not visit mention that it is due to the precinct being too far away. A quarter also mention they don't plan to visit because they simply prefer another area.

People may lack a compelling reason to visit Subi.

A difference of opinions

Purpose of last visit

Have a meal
33%

Shopping
31%

Have a coffee
23%

Base: Visited in the last 6 months n=191

Venues visited

Cafe
49%

Licensed restaurant
20%

Pub / Tavern / Sports bar
17%

Base: Visited in the last 6 months n=191

Travel party

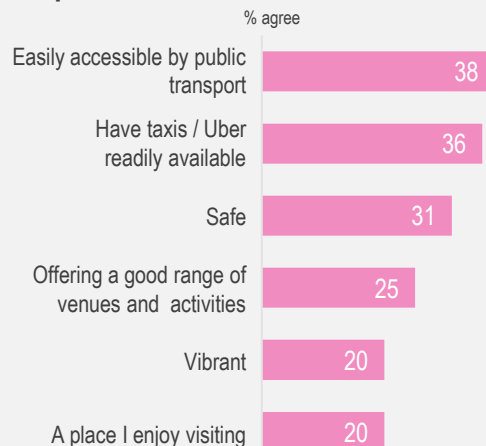
Partner
41%

Friends
29%

On your own & with children
20%

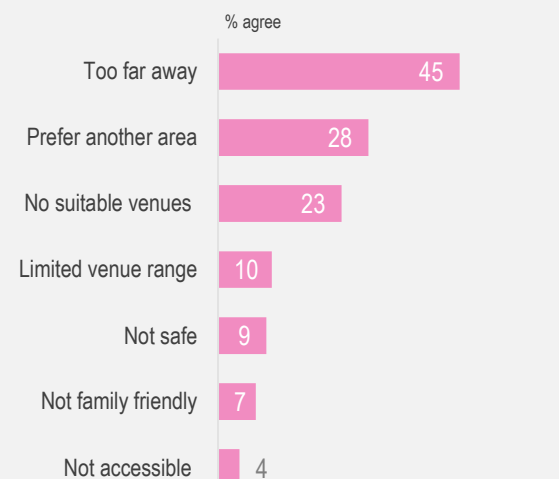
Base: Visited in the last 6 months n=191

Perceptions



Base: All Respondents n=821

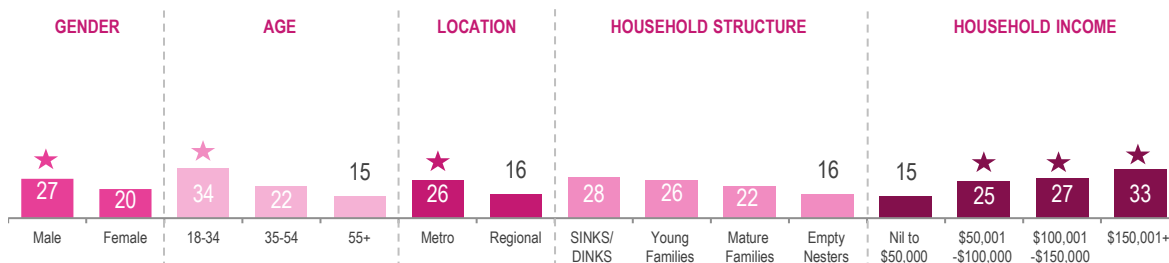
Barriers to visitation



Base: Definitely won't visit n=72

Visitation: Past 6 months

Base: All respondents n=821



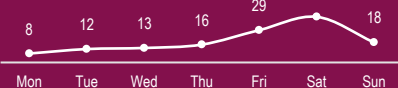


Mt Lawley / Highgate

most
#10 Visited

22% visited in the last 6 months

- 30% during the morning, 52% during the afternoon, 45% during the night
- Top 3 locations: 38% from northern suburbs, 36% from southern suburbs, 7% from inner city



% of visitors each day

most
#10 Favoured

5.7/10 overall rating
6.1/10 in 2017

More cafes please!

Compared to the other precincts, Mt Lawley has experienced the biggest drop in visitation since 2017, and more feel unsure if they will visit the precinct in the near future. Close to half of those who mention they will definitely not visit Mt Lawley, mention that its because of it being too far away and not having suitable venues for their needs.

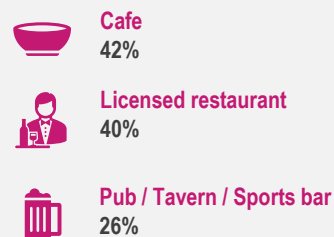
People would like more cafes offered in this precinct, as well as wanting it to become more accessible – which could lead to improved visitation in the future.

Purpose of last visit



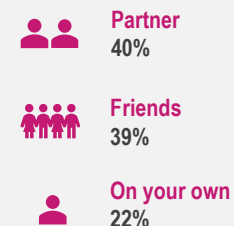
Base: Visited in the last 6 months n=179

Venues visited



Base: Visited in the last 6 months n=179

Travel party



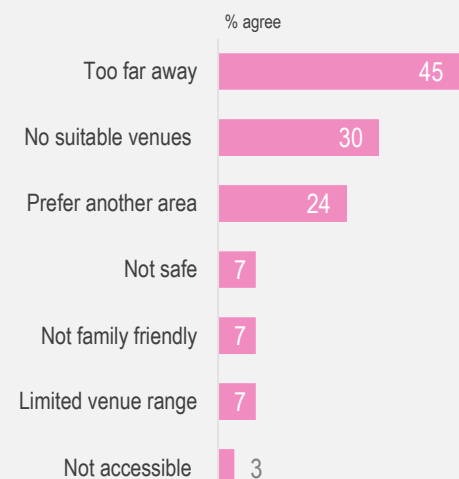
Base: Visited in the last 6 months n=179

Perceptions



Base: All Respondents n=821

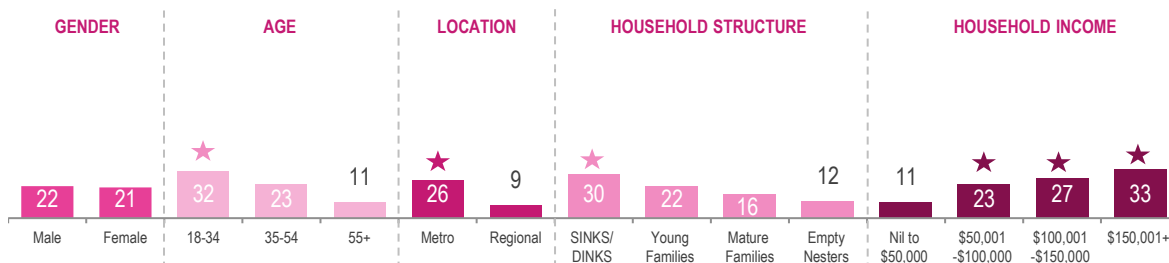
Barriers to visitation



Base: Definitely won't visit n=86

Visitation: Past 6 months

Base: All respondents n=821



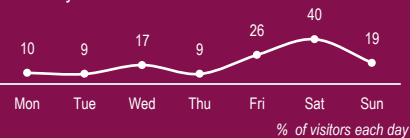


Leederville

#11 ^{most} Visited

21% visited in the last 6 months

- 22% during the morning, 52% during the afternoon, 35% during the night
- Top 3 locations: 37% from northern suburbs, 34% from southern suburbs, 7% from inner city



#9 ^{most} Favoured

5.7/10 overall rating
6.2/10 in 2017

Give us more variety

Leederville is the least visited precinct within the last 6 months – and the third to least favourite relative to the other precincts. It is also the least frequently visited precinct.

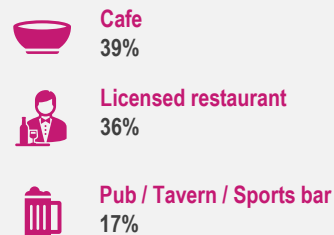
For many, the biggest reason for not visiting Leederville is that it is too far away from them, followed by it not having suitable venues. With a desire for more cafes in the precinct, there is the potential that a more diverse range of venues may help to boost the precinct's suitability and visitation.

Purpose of last visit



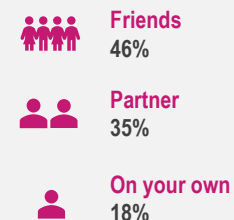
Base: Visited in the last 6 months n=174

Venues visited



Base: Visited in the last 6 months n=174

Travel party



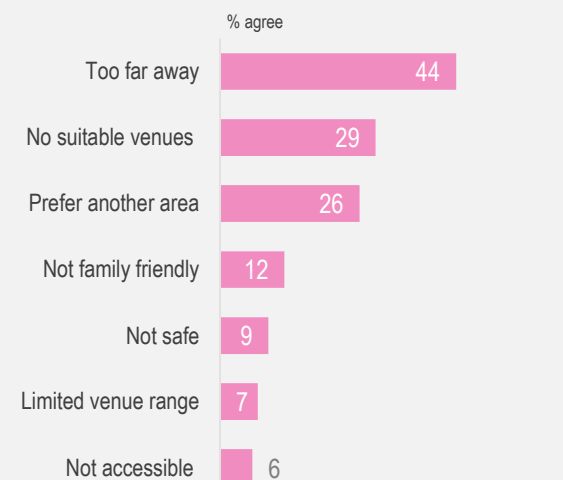
Base: Visited in the last 6 months n=174

Perceptions



Base: All Respondents n=821

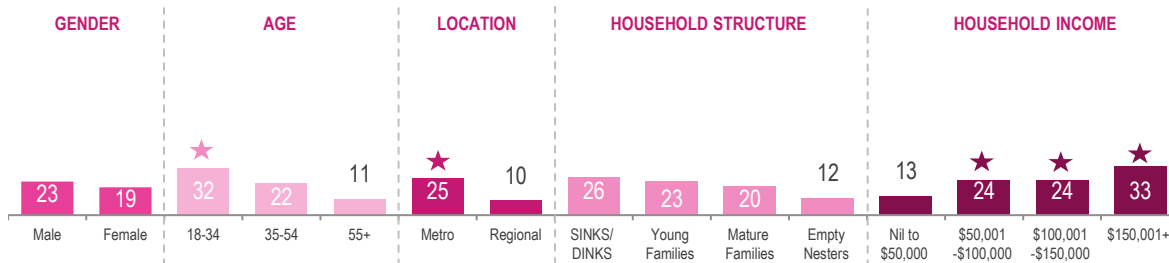
Barriers to visitation



Base: Definitely won't visit n=84

Visitation: Past 6 months

Base: All respondents n=821



Venue Types: Visitation

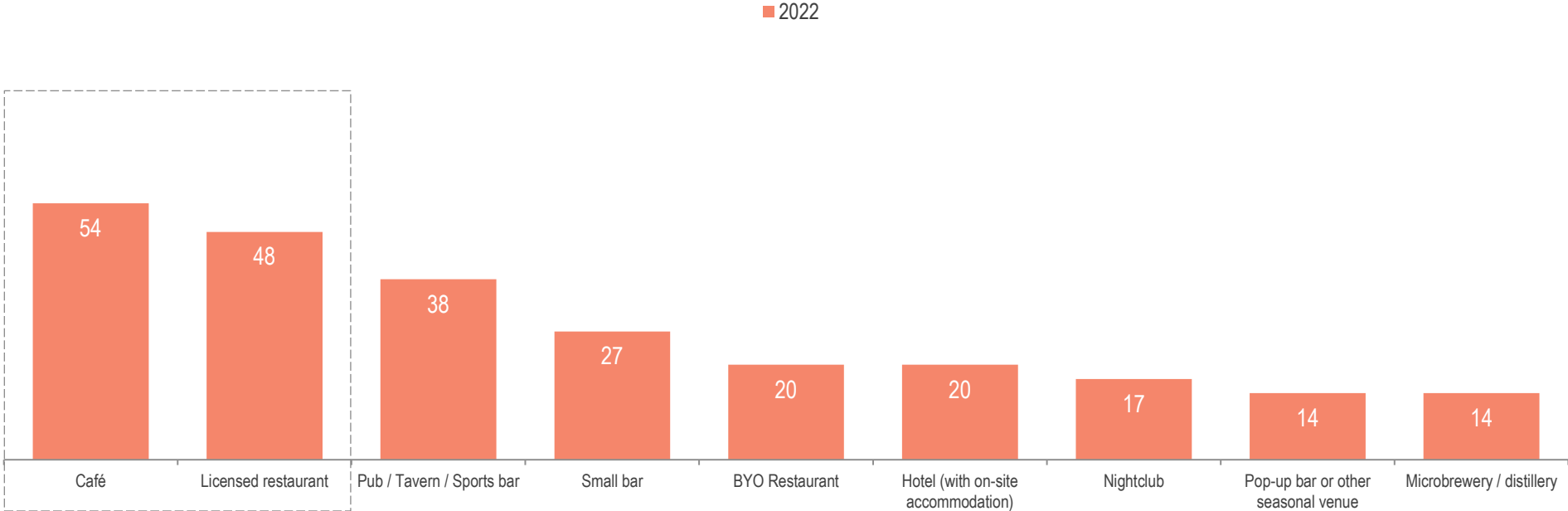


Aligned with the popularity of dining out for meals, cafes and restaurants are the most popular venue types.



More than half have visited cafes in the last 6 months, followed closely by licensed restaurants.

% Visited at all in the past 6 months

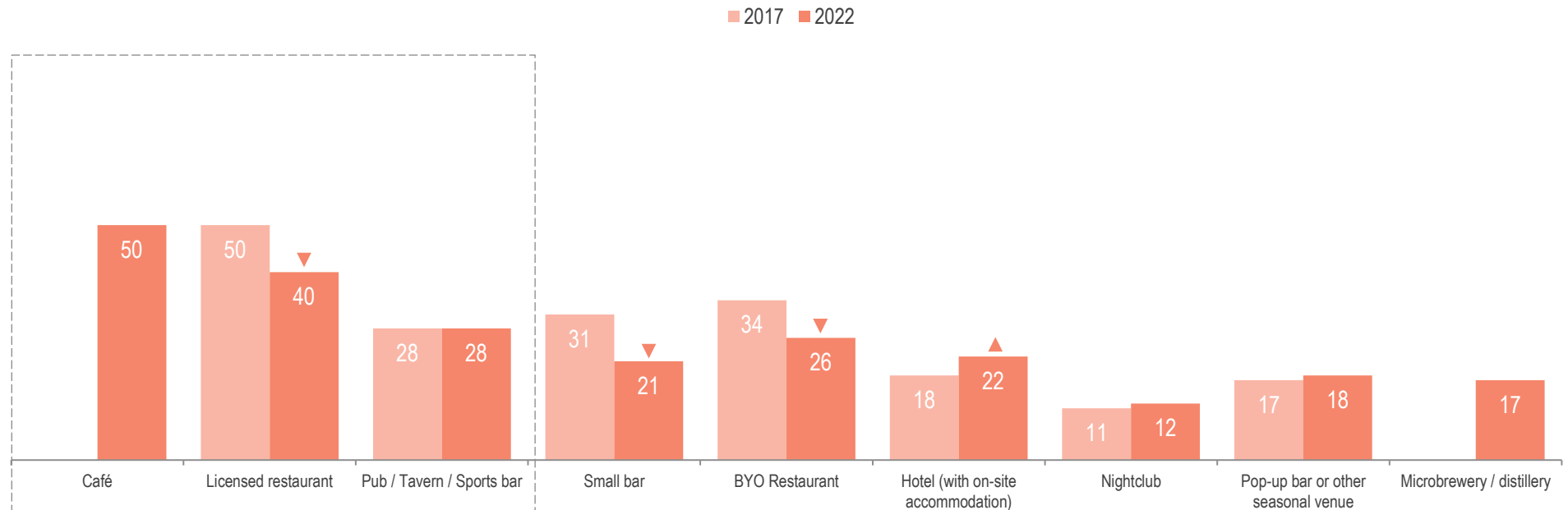


QC1. When you visited these precincts in the last 6 months, did you visit any of the following venue types while you were there? Base: All Respondents, 2022 (n=821); 2017 (n=606).

Cafes will also remain the venue type which is most visited within the next 6 months.

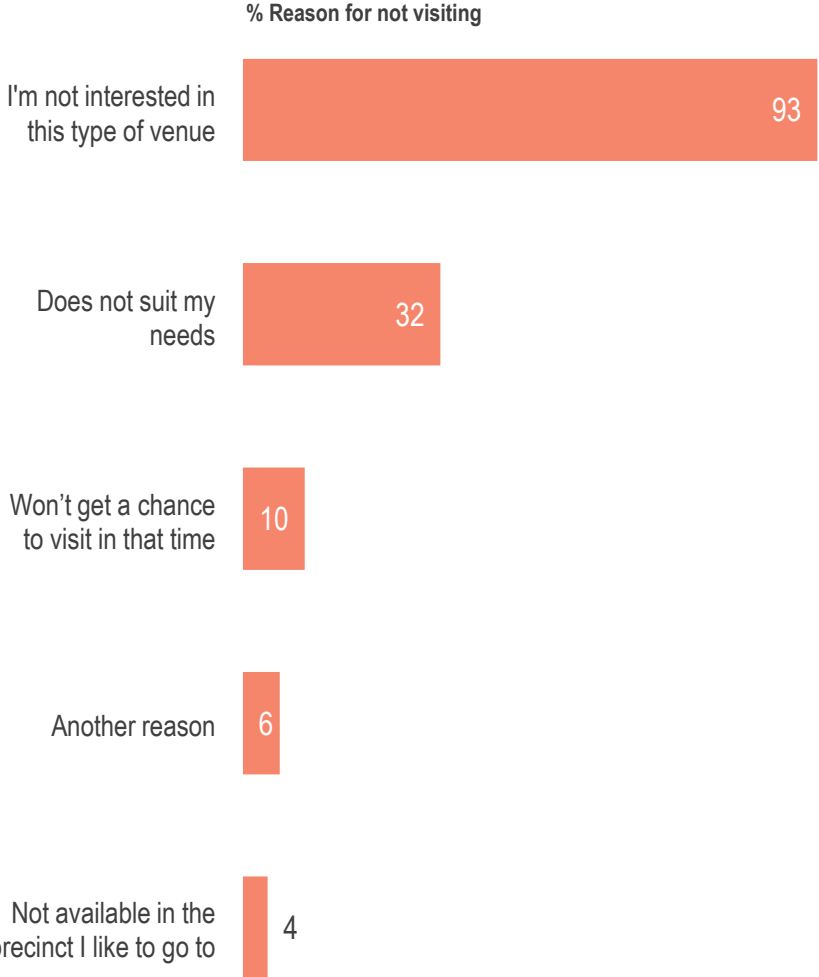
This is followed by licensed restaurants, pubs, taverns and sports bars.

% Definitely will visit in the next 6 months (8-10/10)



QC6. In the next 6 months, how likely are you to visit these venue types within one of the Perth entertainment precincts? Base: All Respondents, 2022 (n=821); 2017 (n=606).

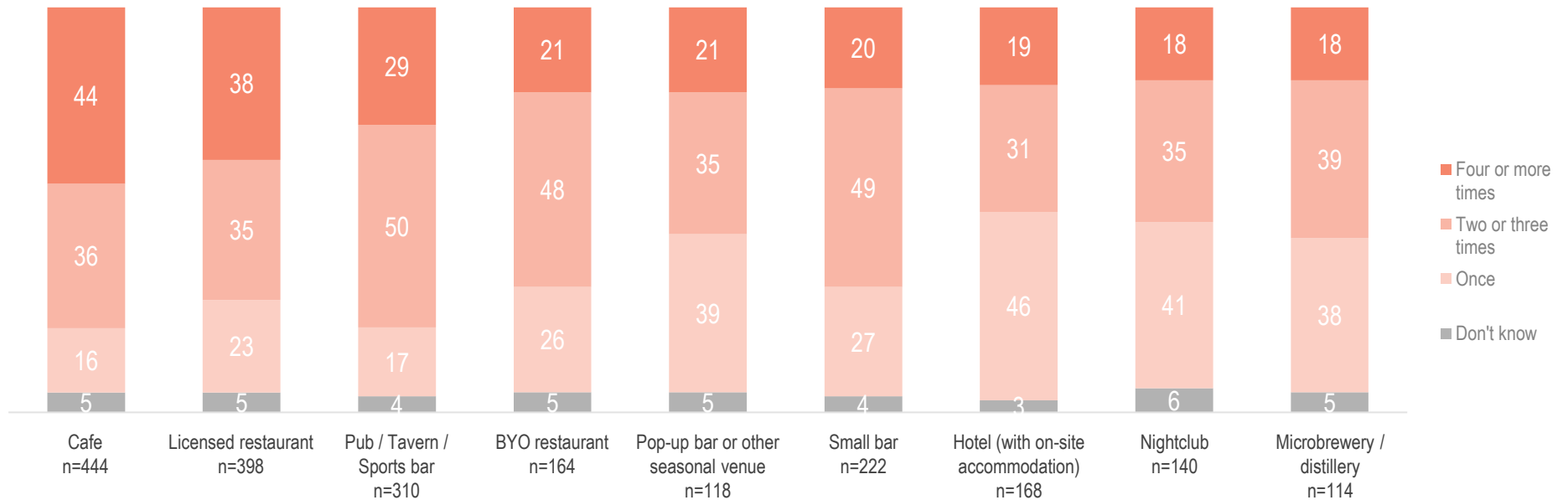
Generally, a lack of interest is the most common reason for not planning to visit a specific venue type.



Among those who have visited each venue recently, cafes are also the most frequently visited venue type.

More than 2 in 5 who went to cafes in the past 6 months visited them four or more times.

% Visit frequency (among recent visitors)



Cafes are the most visited venue type across most precincts.

Licensed restaurants are the second most visited venue type in most precincts – however, they are the most visited venue type for Northbridge and Burswood / Optus Stadium.

■ Most visited venue type per precinct
■ Least visited venue type per precinct

| | Perth CBD n=460 | Elizabeth Quay n=285 | Northbridge n=287 | Fremantle n=378 | Scarborough n=199 | Mt Lawley / Highgate n=179 | Subiaco n=191 | Victoria Park n=250 | Leederville n=174 | South Perth n=272 | Burswood / Optus Stadium n=302 |
|---------------------------------|--------------------|----------------------------|----------------------|--------------------|----------------------|----------------------------------|------------------|------------------------|----------------------|----------------------|---|
| Cafe | 46 | 38 | 25 | 45 | 48 | 42 | 49 | 44 | 39 | 51 | 17 |
| Licensed restaurant | 35 | 30 | 37 | 34 | 26 | 40 | 20 | 31 | 36 | 25 | 38 |
| Pub / tavern / sports bar | 23 | 18 | 27 | 28 | 23 | 26 | 17 | 20 | 17 | 15 | 29 |
| Small bar | 16 | 11 | 21 | 20 | 16 | 14 | 12 | 12 | 12 | 9 | 13 |
| BYO restaurant | 8 | 9 | 14 | 11 | 12 | 12 | 9 | 17 | 11 | 9 | 6 |
| Hotel | 11 | 9 | 10 | 9 | 12 | 5 | 7 | 5 | 4 | 8 | 16 |
| Nightclub | 10 | 4 | 31 | 8 | 9 | 3 | 5 | 3 | 7 | 5 | 7 |
| Pop up bar or seasonal venue | 7 | 12 | 7 | 8 | 9 | 8 | 3 | 4 | 4 | 7 | 8 |
| Microbrewery / distillery | 4 | 7 | 6 | 16 | 3 | 3 | 6 | 5 | 4 | 6 | 4 |

Of all precincts, South Perth is most visited for its cafes – but other precincts are also known for certain venue types.

For pop-up bars / venues, people are most often visiting Elizabeth Quay; for small bars and nightclubs they're going to Northbridge; and for microbreweries they're going to Freo. Victoria Park is popular for its BYO restaurants; Mt Lawley for licensed restaurants, and Burswood / Optus Stadium for pubs, taverns, sports bars and hotels.

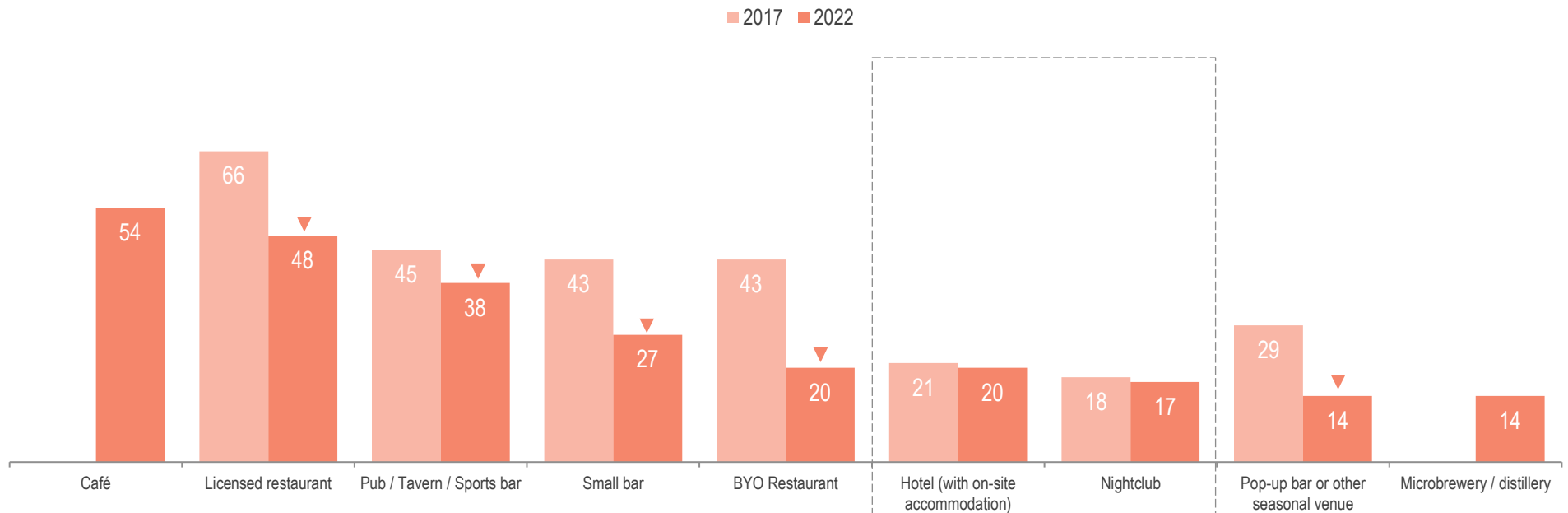
■ Highest visitation of precinct per venue type
■ Lowest visitation of precinct per venue type

| | Perth CBD n=460 | Elizabeth Quay n=285 | Northbridge n=287 | Fremantle n=378 | Scarborough n=199 | Mt Lawley / Highgate n=179 | Subiaco n=191 | Victoria Park n=250 | Leederville n=174 | South Perth n=272 | Burswood / Optus Stadium n=302 |
|---------------------------------|--------------------|----------------------------|----------------------|--------------------|----------------------|----------------------------------|------------------|------------------------|----------------------|----------------------|---|
| Cafe | 46 | 38 | 25 | 45 | 48 | 42 | 49 | 44 | 39 | 51 | 17 |
| Licensed restaurant | 35 | 30 | 37 | 34 | 26 | 40 | 20 | 31 | 36 | 25 | 38 |
| Pub / tavern / sports bar | 23 | 18 | 27 | 28 | 23 | 26 | 17 | 20 | 17 | 15 | 29 |
| Small bar | 16 | 11 | 21 | 20 | 16 | 14 | 12 | 12 | 12 | 9 | 13 |
| BYO restaurant | 8 | 9 | 14 | 11 | 12 | 12 | 9 | 17 | 11 | 9 | 6 |
| Hotel | 11 | 9 | 10 | 9 | 12 | 5 | 7 | 5 | 4 | 8 | 16 |
| Nightclub | 10 | 4 | 31 | 8 | 9 | 3 | 5 | 3 | 7 | 5 | 7 |
| Pop up bar or seasonal venue | 7 | 12 | 7 | 8 | 9 | 8 | 3 | 4 | 4 | 7 | 8 |
| Microbrewery / distillery | 4 | 7 | 6 | 16 | 3 | 3 | 6 | 5 | 4 | 6 | 4 |

However, recent visitation to most venue types has dropped compared to 5 years ago.

This is again likely due to impacts of COVID. Interestingly, recent visitation to hotels and nightclubs remains similar to 2017.

% Visited at all in the past 6 months



QC1. When you visited these precincts in the last 6 months, did you visit any of the following venue types while you were there? Base: All Respondents, 2022 (n=821); 2017 (n=606).

Venue visitation differs by each age group...
let's take a look at where everyone is visiting!



18-34 year olds

Venue visitation is highest among this age group.

18-34 year olds visit all venue types more than other age groups. In particular, they are significantly more likely than older age groups to have recently visited licensed restaurants, small bars, pubs, taverns, sports bars, hotels, nightclubs, and pop-up bars or seasonal venues.

Their most commonly visited venue types are licensed restaurants (72%), cafes (70%) and pub / taverns / sports bars (58%).

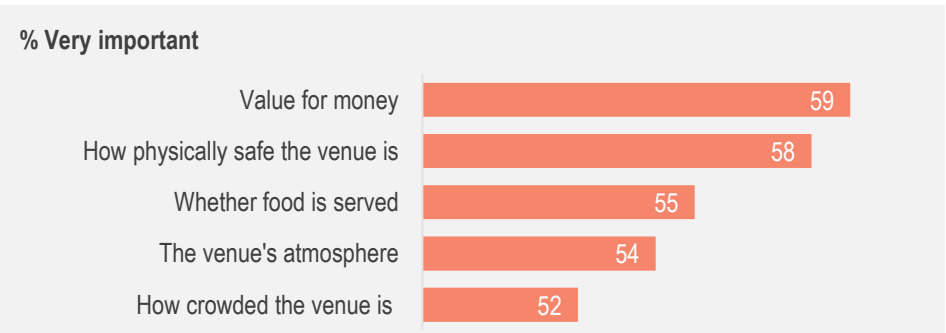
Their most important considerations when choosing a venue are value for money, physical safety, and whether food is served at the venue.

While these are relatively common considerations across all ages, younger people are also more likely than other age groups to consider if the venue is new, whether alcohol is served at the venue, the types of alcohol served, if there is live music or other entertainment, and the uniqueness of the venue.

For visitation to each venue type, they are more likely to visit ...

- Cafés, microbreweries / distilleries, hotels, licensed restaurants, and BYO restaurants with a partner
- Pop-up bars and other seasonal venues, nightclubs, pubs / taverns / sports bars, and small bars with friends

| % Visited past 6 months | 18-34 n=227 | 35-54 n=226 | 55+ n=203 |
|------------------------------------|----------------|----------------|--------------|
| Significantly higher | | | |
| BYO restaurant | 28 | 24 | 23 |
| Licensed restaurant | 72 | 59 | 50 |
| Small bar | 44 | 33 | 24 |
| Pub / tavern / sports bar | 58 | 45 | 38 |
| Hotel (with on-site accommodation) | 33 | 24 | 19 |
| Nightclub | 37 | 18 | 7 |
| Pop-up bar or other seasonal venue | 31 | 13 | 9 |
| Micro brewery / distillery | 20 | 17 | 14 |
| Cafe | 70 | 68 | 64 |



35-54 year olds

Café culture is big among this age group.

More than two thirds of this age group have visited a cafe in the past 6 months, making it their most visited venue type. Licensed restaurants are also visited by around 3 in 5 35-54 year olds – and pubs, taverns and sports bar are visited by more than 2 in 5.

For this group, physical safety is of utmost importance.

Two in three of those aged 35-54 place high importance on whether a venue has a risk of antisocial behaviour. Compared to younger people, they are also more concerned about whether a venue is smoke-free.

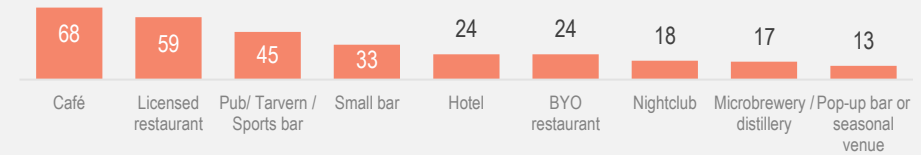
They are more likely than other age groups to visit venues with children.

In particular, those in this age group are more likely to visit cafes (40%), hotels (40%) and licensed restaurants (33%) with their children, compared to those in other age groups.

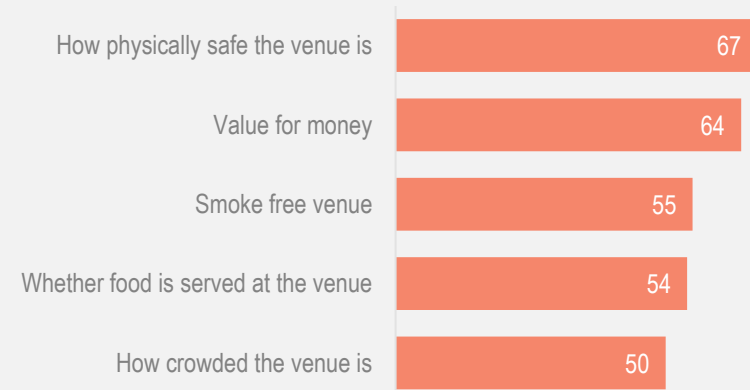
However, they still spend more time in venues with their partner.

While they are more likely than other age groups to visit venues with their children, at least half of those aged 35-54 who visit cafes, microbreweries and distilleries, pop-up bars, hotels, pubs, taverns, sports bars and restaurants do it with their partner. However, those who visit nightclubs and small bars do it more often than so with their friends.

% Visited in the past 6 months

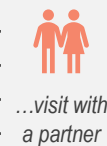
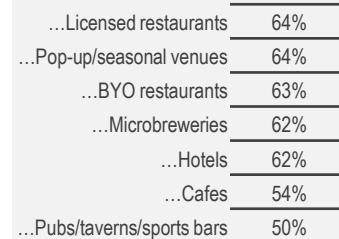


% Very important

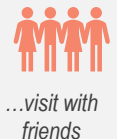
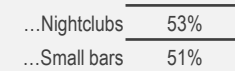


Who they visit with

Of those who visit...



Of those who visit...



55+ year olds

Visitation of each venue type is lowest amongst this age group.

Compared to their younger counterparts, those age 55+ are less likely to visit any of the venue types. The most visited venue type amongst this age group are cafes, followed by licensed restaurants and pubs.

Similar to those age 35-54, physical safety is also the most important consideration for this age group when visiting a venue type.

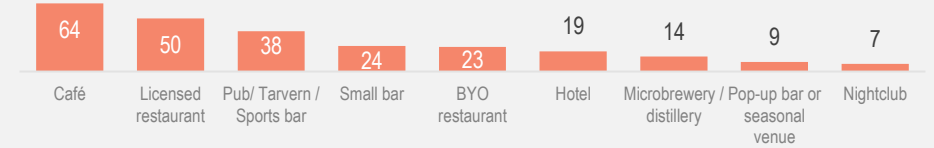
In fact, close to 3 in 4 of those age 55+ mention that the physical safety of a venue is very important to them. They are also the most concerned of the three groups about physical safety, being a smoke free venue, value for money, and are significantly more concerned about personal health and safety than those younger than them.

They are least concerned on whether a venue is a brand new venture, the type of alcohol served, if the venue has live music, and if it caters well to children.

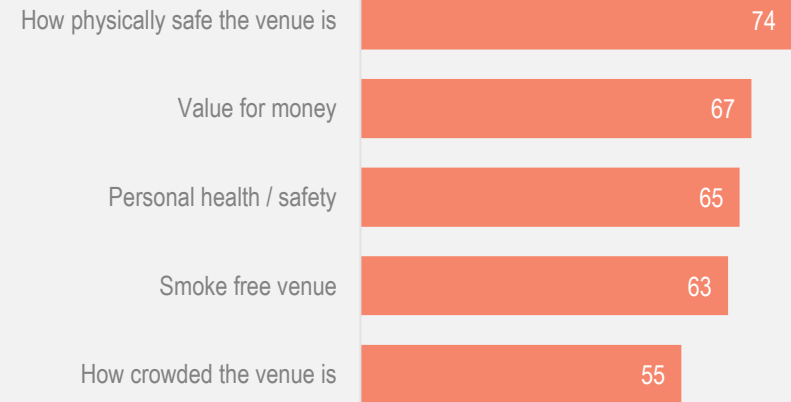
They spend the most time visiting these venue types with their partners.

For all venue types, more than half of those who visit them mention they do so with their partners.

% Visited in the past 6 months



% Very important



Where they visit

Of those who visit...

| | |
|-------------------------------|-----|
| ...Pop-up / seasonal venues | 78% |
| ...Hotels | 69% |
| ...Licensed restaurants | 65% |
| ...Café | 64% |
| ...Microbreweries | 63% |
| ...BYO restaurants | 58% |
| ...Pubs/ taverns/ sports bars | 56% |
| ...Small bar | 54% |



...visit with a partner

Venue Types: Overall Perceptions

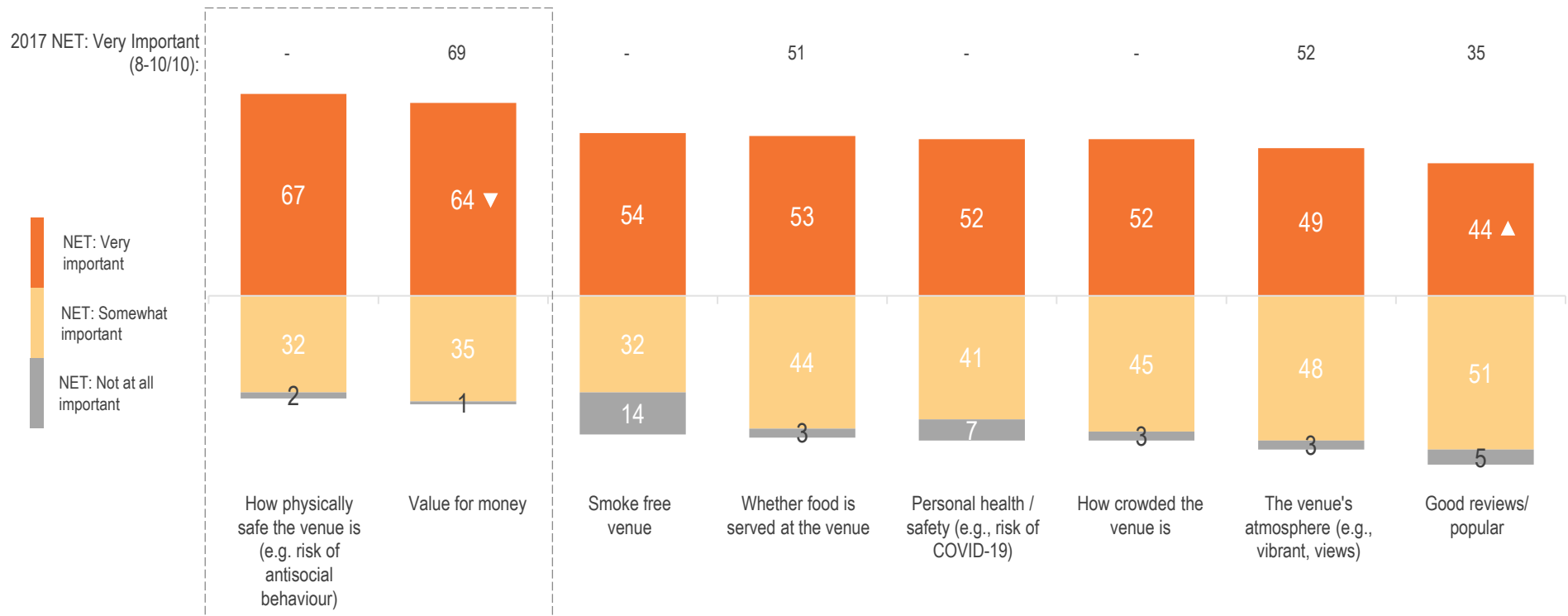


When it comes to venue choice, safety and value are paramount.



In fact, around 2 in 3 consider physical safety and value for money very important.

Interestingly given the rising cost of living, the importance placed on value for money has dropped from where it was in 2017. However, significantly more people in 2022 consider good reviews/popularity of a venue very important.

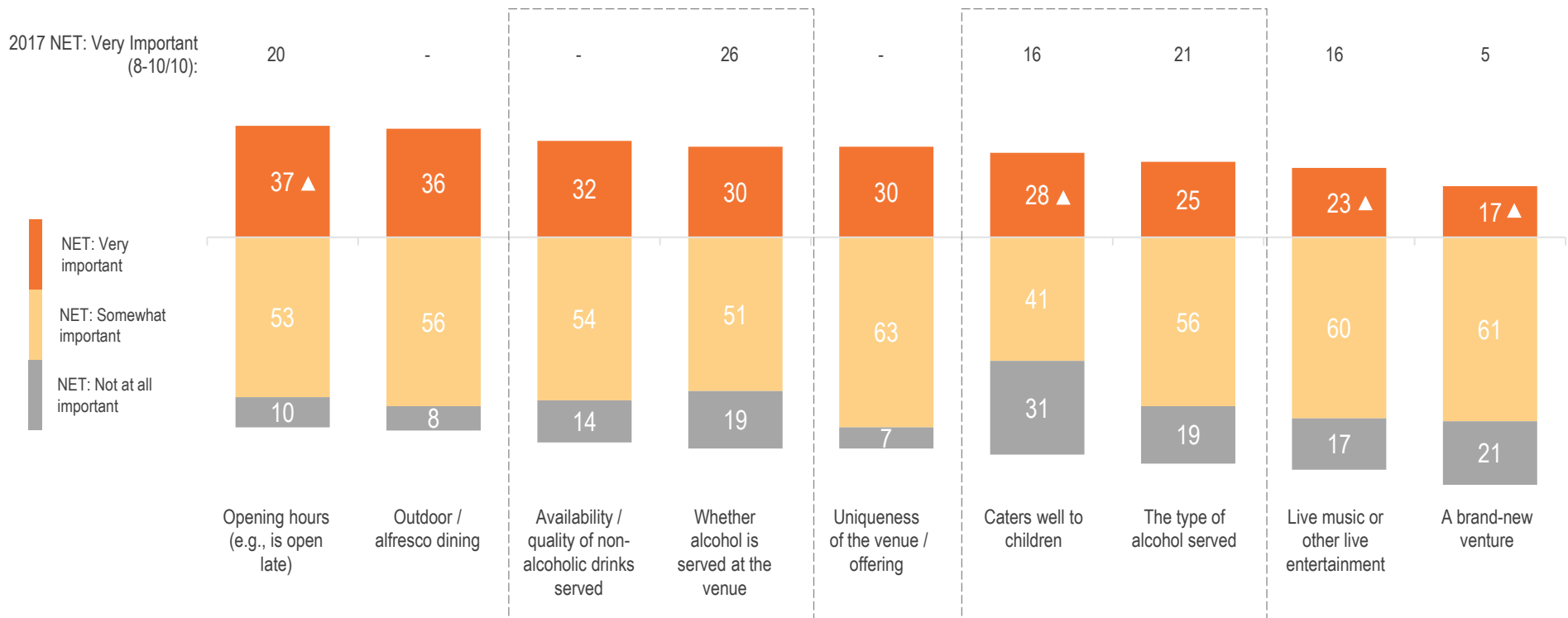


QC5. How important are these considerations for you when deciding which type of venue to visit within one of Perth entertainment precincts? Base: All Respondents, 2022 (n=821); 2017 (n=606).

Among less important factors, around 1 in 3 don't consider it important for a venue to cater well to children...

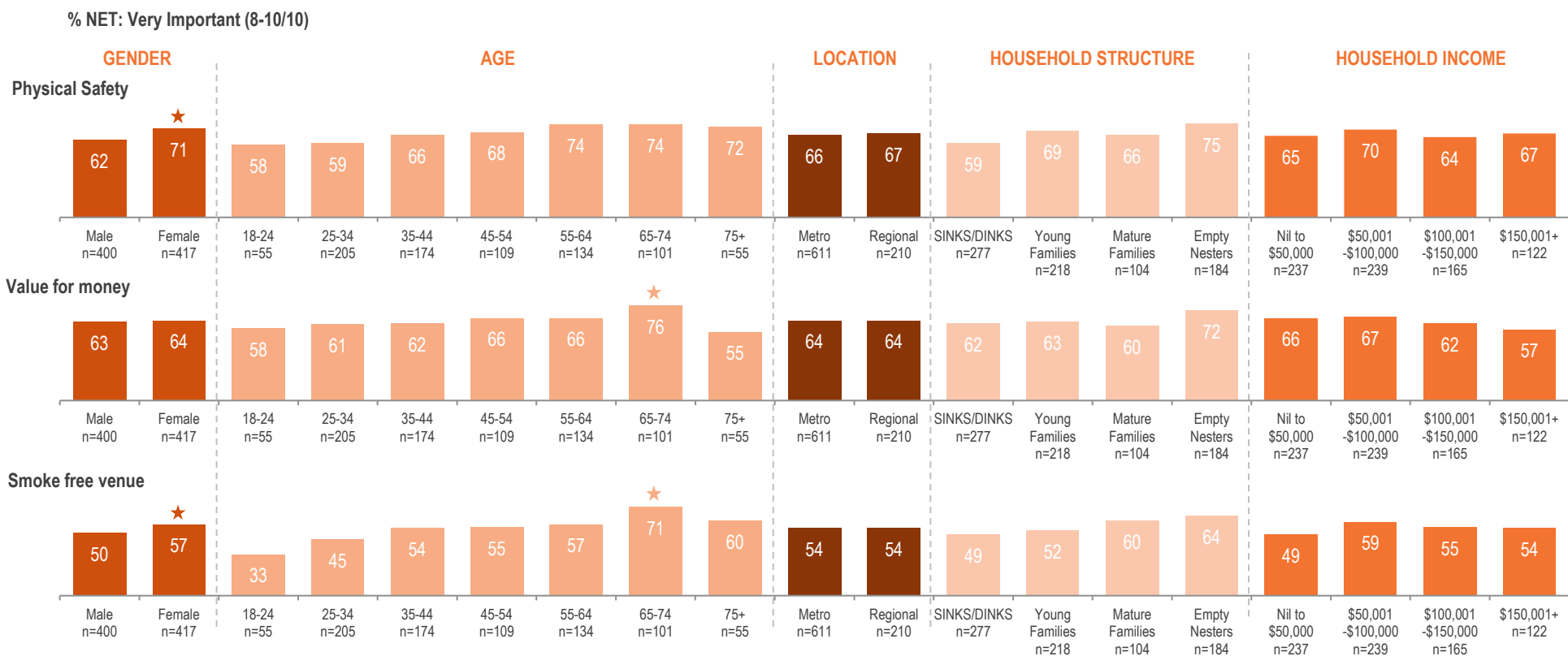
...however, the proportion of people who do consider this important has increased significantly since 2017.

When it comes to drinks, around 1 in 3 consider it important if the venue serves alcohol, and just 1 in 4 are concerned about the type of alcohol served. In comparison, there is a higher level of importance placed on the availability and quality of non-alcoholic drinks served at a venue.



Physical safety and smoke-free venues tend to be most important among females and older patrons.

Value for money is a more important consideration when choosing a venue for those with lower household incomes – and the importance of this factor declines as income increases.



QC5. How important are these considerations for you when deciding which type of venue to visit within one of Perth entertainment precincts? Base: All Respondents, 2022 (n=821).

There are certain venue types that are considered most appropriate for each precinct – but there's more demand for cafés everywhere!



According to the community, cafes are the most suitable venue type for most precincts.

This is to the exception of licensed restaurants being most suitable for Burswood, and nightclubs most suitable for Northbridge.

For most precincts, the least appropriate venue types are nightclubs and micro-breweries / distilleries.

| | Perth CBD | Elizabeth Quay | Northbridge | Fremantle | Scarborough | Mt Lawley / Highgate | Subiaco | Victoria Park | Leederville | South Perth | Burswood / Optus Stadium |
|------------------------------------|-----------|----------------|-------------|-----------|-------------|----------------------|---------|---------------|-------------|-------------|--------------------------|
| BYO restaurant | 57 | 46 | 51 | 61 | 54 | 52 | 53 | 54 | 52 | 53 | 38 |
| Licensed restaurant | 71 | 63 | 62 | 70 | 63 | 58 | 66 | 62 | 60 | 63 | 61 |
| Small bar | 60 | 51 | 54 | 61 | 52 | 49 | 55 | 47 | 51 | 51 | 47 |
| Pub / tavern / sports bar | 57 | 42 | 56 | 61 | 55 | 46 | 51 | 52 | 50 | 48 | 54 |
| Hotel | 66 | 46 | 42 | 62 | 54 | 29 | 41 | 30 | 32 | 44 | 50 |
| Nightclub | 52 | 17 | 66 | 49 | 33 | 19 | 29 | 17 | 29 | 19 | 32 |
| Pop-up bar or other seasonal venue | 48 | 46 | 45 | 52 | 43 | 32 | 38 | 32 | 35 | 37 | 37 |
| Micro brewery / distillery | 35 | 31 | 35 | 60 | 31 | 27 | 34 | 28 | 29 | 28 | 29 |
| Cafe | 73 | 67 | 58 | 73 | 70 | 65 | 68 | 67 | 66 | 71 | 56 |
| None | 6 | 8 | 10 | 5 | 8 | 13 | 9 | 10 | 10 | 8 | 8 |

Almost all venue types are considered most suitable in Freo...

...while licensed restaurants, hotels and cafes are most suitable for the CBD.

■ Most suitable precinct for venue type
■ Least suitable precinct for venue type

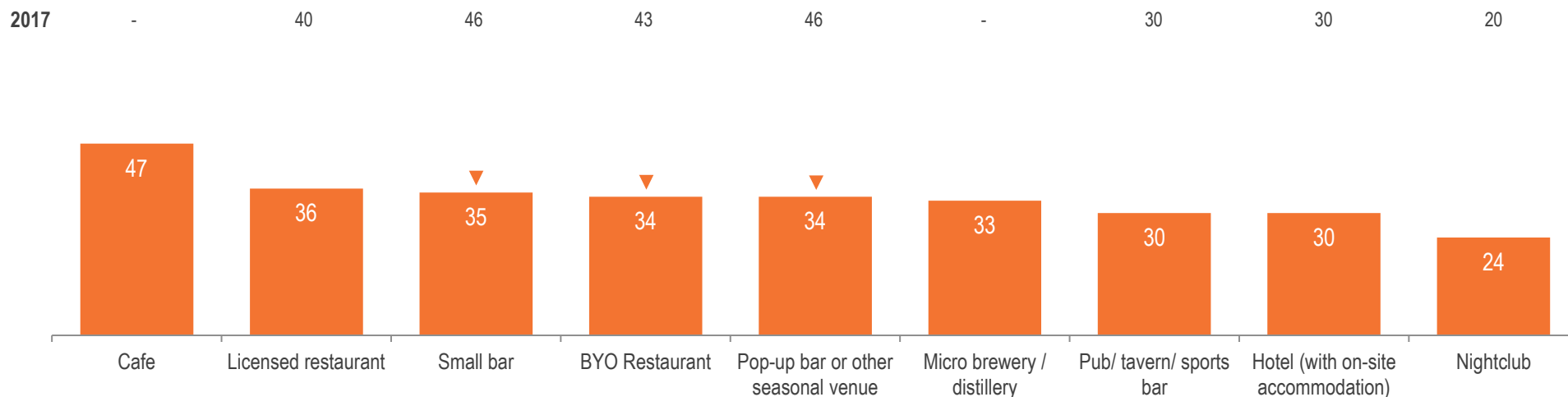
| | Perth CBD | Elizabeth Quay | Northbridge | Fremantle | Scarborough | Mt Lawley / Highgate | Subiaco | Victoria Park | Leederville | South Perth | Burswood / Optus Stadium |
|------------------------------------|-----------|----------------|-------------|-----------|-------------|----------------------|---------|---------------|-------------|-------------|--------------------------|
| BYO restaurant | 57 | 46 | 51 | 61 | 54 | 52 | 53 | 54 | 52 | 53 | 38 |
| Licensed restaurant | 71 | 63 | 62 | 70 | 63 | 58 | 66 | 62 | 60 | 63 | 61 |
| Small bar | 60 | 51 | 54 | 61 | 52 | 49 | 55 | 47 | 51 | 51 | 47 |
| Pub / tavern / sports bar | 57 | 42 | 56 | 61 | 55 | 46 | 51 | 52 | 50 | 48 | 54 |
| Hotel | 66 | 46 | 42 | 62 | 54 | 29 | 41 | 30 | 32 | 44 | 50 |
| Nightclub | 52 | 17 | 66 | 49 | 33 | 19 | 29 | 17 | 29 | 19 | 32 |
| Pop-up bar or other seasonal venue | 48 | 46 | 45 | 52 | 43 | 32 | 38 | 32 | 35 | 37 | 37 |
| Micro brewery / distillery | 35 | 31 | 35 | 60 | 31 | 27 | 34 | 28 | 29 | 28 | 29 |
| Cafe | 73 | 67 | 58 | 73 | 70 | 65 | 68 | 67 | 66 | 71 | 56 |
| None | 6 | 8 | 10 | 5 | 8 | 13 | 9 | 10 | 10 | 8 | 8 |

In terms of what people would like to see more of around Perth, there is general demand for more cafés.

Just under half say they would like to see more cafes in at least one entertainment precinct.

Compared to 2017, there is less demand for more small bars, BYO restaurants and seasonal venues – possibly due to an increase in these types of venues in recent years.

% Would like to see more of



QD2. And are there any venue types you'd like to see more of in these entertainment precincts? Base: All Respondents, 2022 (n=821); 2017 (n=606).

There is a desire for more cafés across all precincts.

There is also some desire for more restaurants across most precincts.

Pop-up bars and seasonal venues are more desired in precincts such as Fremantle, Elizabeth Quay, Perth CBD and South Perth.

■ Most in-demand venue type per precinct
■ Least in-demand venue type per precinct

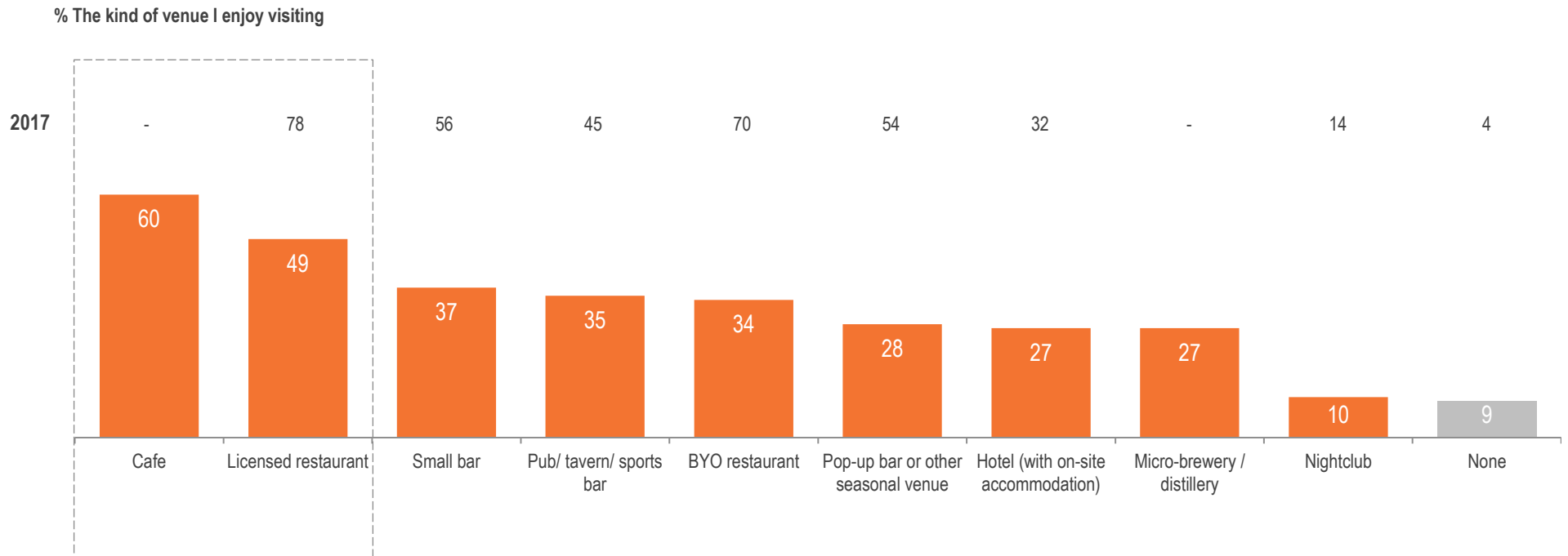
| | Perth CBD | Elizabeth Quay | Northbridge | Fremantle | Scarborough | Mt Lawley / Highgate | Subiaco | Victoria Park | Leederville | South Perth | Burswood / Optus Stadium |
|------------------------------------|-----------|----------------|-------------|-----------|-------------|----------------------|---------|---------------|-------------|-------------|--------------------------|
| BYO restaurant | 12 | 11 | 12 | 13 | 11 | 12 | 13 | 12 | 13 | 11 | 9 |
| Licensed restaurant | 13 | 13 | 10 | 13 | 13 | 13 | 13 | 12 | 12 | 12 | 13 |
| Small bar | 12 | 13 | 12 | 10 | 12 | 13 | 11 | 12 | 11 | 12 | 12 |
| Pub / tavern / sports bar | 10 | 9 | 9 | 10 | 10 | 8 | 10 | 9 | 9 | 8 | 9 |
| Hotel | 10 | 10 | 7 | 14 | 8 | 8 | 9 | 8 | 7 | 9 | 8 |
| Nightclub | 9 | 6 | 9 | 8 | 7 | 6 | 8 | 6 | 7 | 6 | 7 |
| Pop-up bar or other seasonal venue | 13 | 14 | 10 | 16 | 12 | 10 | 11 | 10 | 11 | 12 | 11 |
| Micro brewery / distillery | 12 | 12 | 10 | 14 | 10 | 9 | 11 | 9 | 10 | 11 | 10 |
| Cafe | 20 | 24 | 16 | 20 | 21 | 18 | 18 | 21 | 19 | 19 | 20 |
| None | 49 | 45 | 56 | 48 | 50 | 53 | 52 | 53 | 53 | 52 | 49 |

This aligns with the fact that cafes and restaurants are the kinds of places that people enjoy visiting.



Residents enjoy visiting cafes and licensed restaurants most.

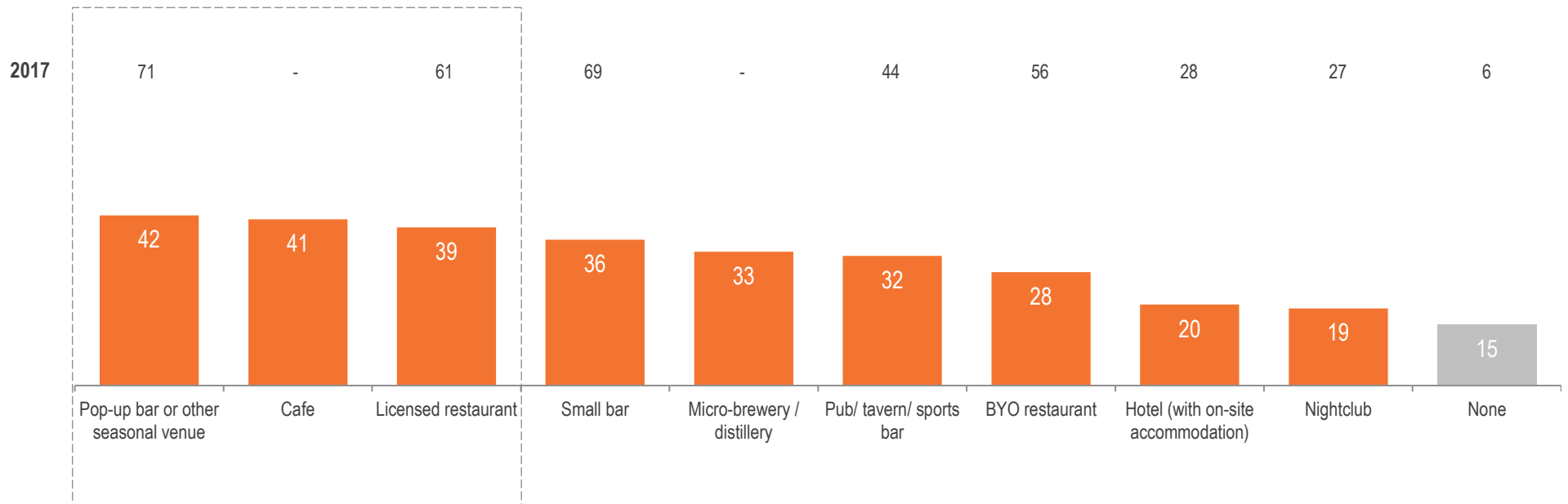
Nightclubs are the least enjoyable venue type – possibly because by nature nightclubs cater to a specific age group.



QD3. Would you describe the following as [the kind of venue I enjoy visiting]? Base: All Respondents, 2022 (n=821)

Seasonal venues, along with cafes and licensed restaurants, contribute most to a precinct's vibrancy.

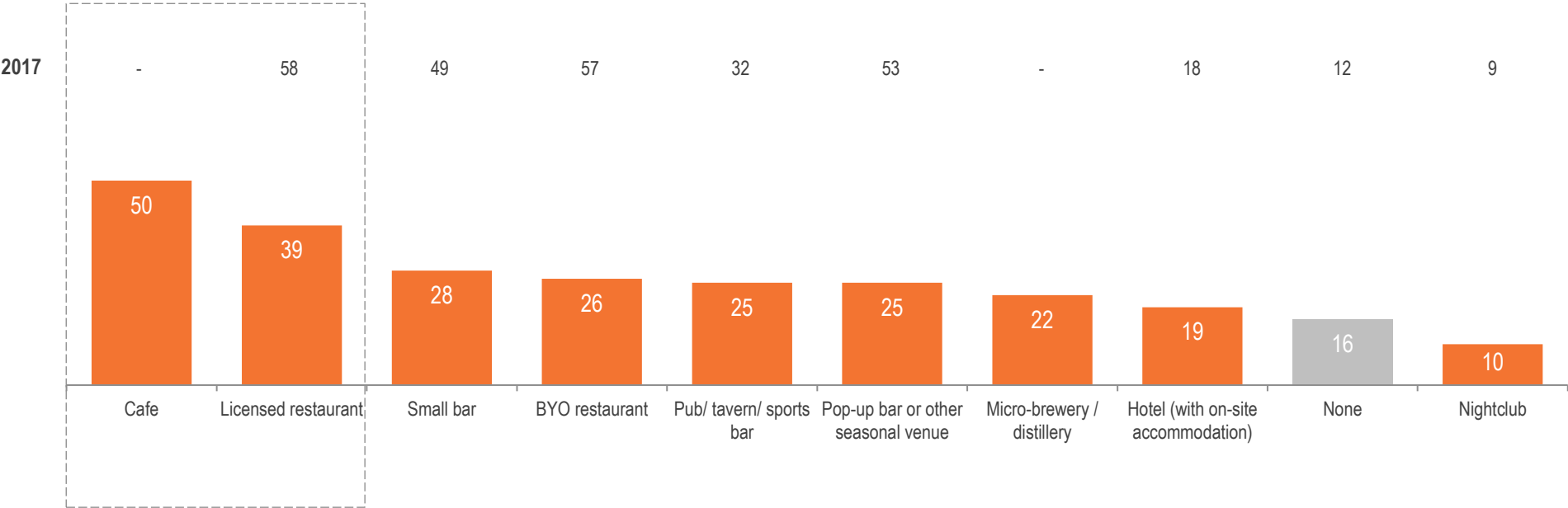
% Adds to the vibrancy of an entertainment precinct



QD4. Would you describe the following as [adds to the vibrancy of an entertainment precinct]? Base: All Respondents, 2022 (n=821)

Cafes and licensed restaurants also increase the likelihood of visiting a precinct.

% Makes me more likely to visit an entertainment precinct



QD5. Would you describe the following as [makes me more likely to visit an entertainment precinct]. Base: All Respondents, 2022 (n=821)

Venue Types: Visitor Profiles





Cafes

#1 most Visited

54% visited in the last 6 months

24% visited more than four times, 20% visited two or three times, 8% visited once

60%

The kind of venue I enjoy visiting

50%

Makes me more likely to visit a precinct

41%

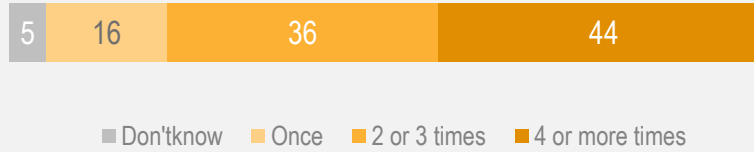
Adds to the vibrancy of a precinct

Base: All Respondents n=821

Cafes are the most popular and sought after venue type in all precincts. Apart from being the most visited venue type in the last 6 months, cafes are also the most frequently visited - and remain the most likely visited venue type to be visited in the next 6 months!

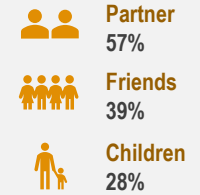
Not only do cafes have the biggest influence on likelihood of precinct visitation, they are also the type of venue that people enjoy visiting most. It is therefore not surprising that there is a desire for more cafes across all entertainment precincts; and according to the community, they are the most suitable venue for most precincts, too. And while popular among everyone, likelihood to visit and enjoyment of cafes increases with age.

Frequency of visitation



Base: Visited cafes in the last 6 months n=444

Travel party



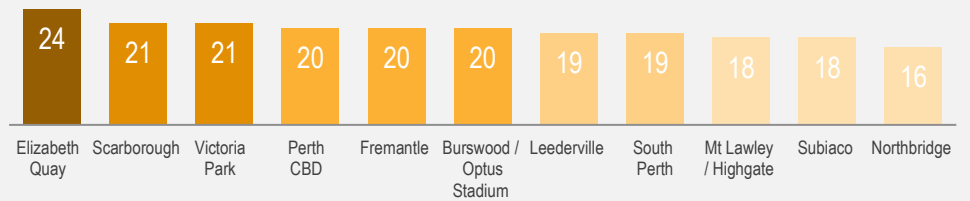
Base: Visited cafes in the last 6 months n=444



47% would like to see more

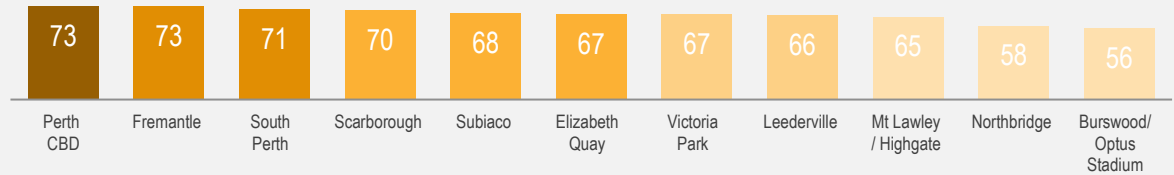
Base: All Respondents n=821

% Would like to see more cafes



Base: All Respondents n=821

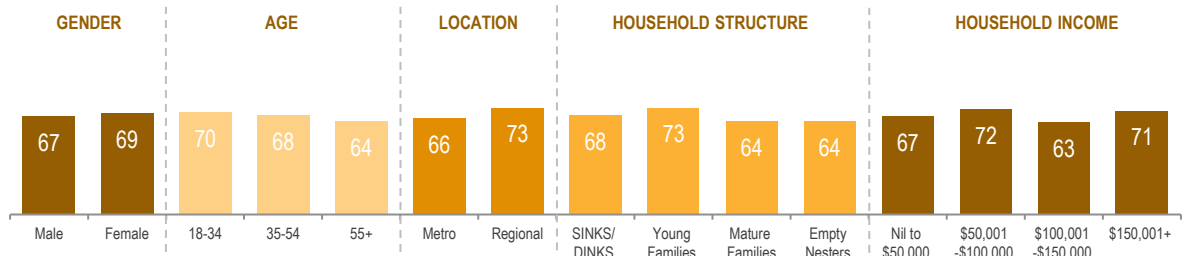
% Suitability of cafes for precincts



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





Licensed restaurants

most
#2 Visited

48% visited in the last 6 months

19% visited more than four times, 17% visited two or three times, 11% visited once

49%

The kind of venue I enjoy visiting

39%

Makes me more likely to visit a precinct

39%

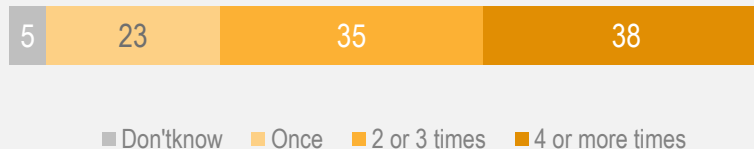
Adds to the vibrancy of a precinct

Base: All Respondents n=821

Demand, preference for and visitation to licensed restaurants across Perth are all very strong. 2 in 5 mention they will definitely visit a licensed restaurant in the next 6 months, and they are also the second most frequently visited venue type.

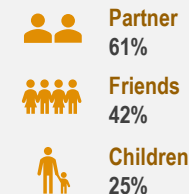
Licensed restaurants are important to any precinct, as they rank in second place in their importance for adding vibrancy and increasing likelihood of visitation to an area. There is generally an equal desire to see more licensed restaurants across all precincts as they're considered highly suitable almost anywhere—and overall, 1 in 3 would like to see more licensed restaurants across Perth entertainment precincts.

Frequency of visitation



Base: Visited licensed restaurants in the last 6 months n=398

Travel party



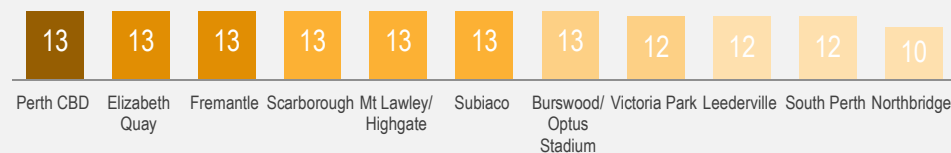
Base: Visited licensed restaurants in the last 6 months n=398



36%
would like to see more

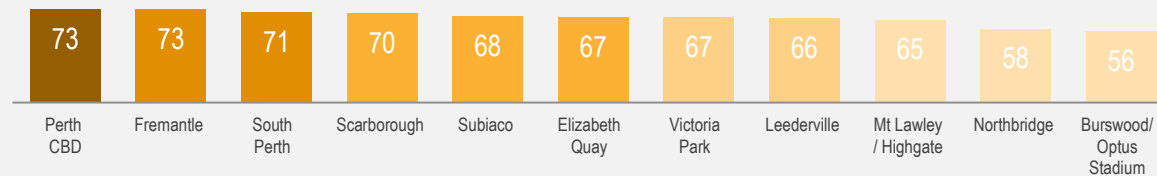
Base: All Respondents n=821

% Would like to see more licensed restaurants



Base: All Respondents n=821

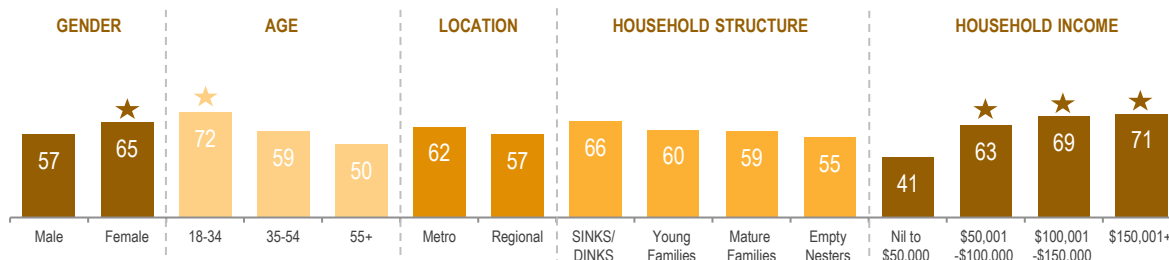
% Suitability of licensed restaurants for precincts



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





Pubs / Taverns / Sports Bars

most
#3 Visited

38% visited in the last 6 months

11% visited more than four times, 19% visited two or three times, 6% visited once

35%

The kind of venue I enjoy visiting

25%

Makes me more likely to visit a precinct

32%

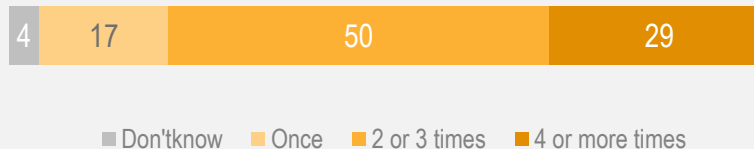
Adds to the vibrancy of a precinct

Base: All Respondents n=821

Pubs, taverns and sports bars are the third most popular venue type, have the third highest visitation frequency, and have the third strongest future visitation intention. Intentions to visit pubs, taverns and sports remained the same compared to 2017 levels – unlike intentions to visit other venue types, which fell in 2022.

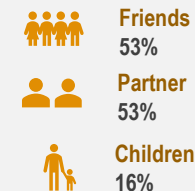
Burswood / Optus Stadium is the go-to place for pubs, taverns and sports bars – with 3 in 10 who visit the precinct visiting this type of venue. Males are more likely to mention that the presence of pubs, taverns and sports bar increases their likelihood to visit a precinct.

Frequency of visitation



Base: Visited pubs, taverns, and sports bars in the last 6 months n=310

Travel party



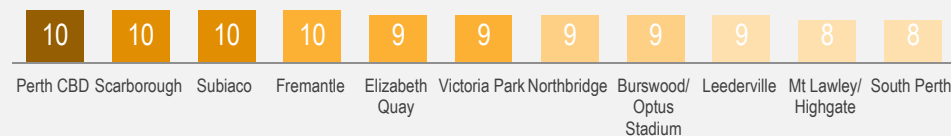
Base: Visited pubs, taverns, and sports bars in the last 6 months n=310



30%
would like to see more

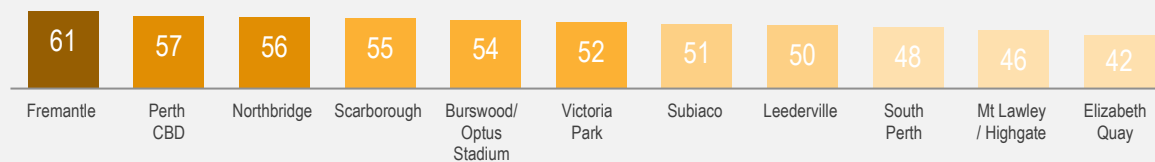
Base: All Respondents n=821

% Would like to see more pubs / tavern / sports bars



Base: All Respondents n=821

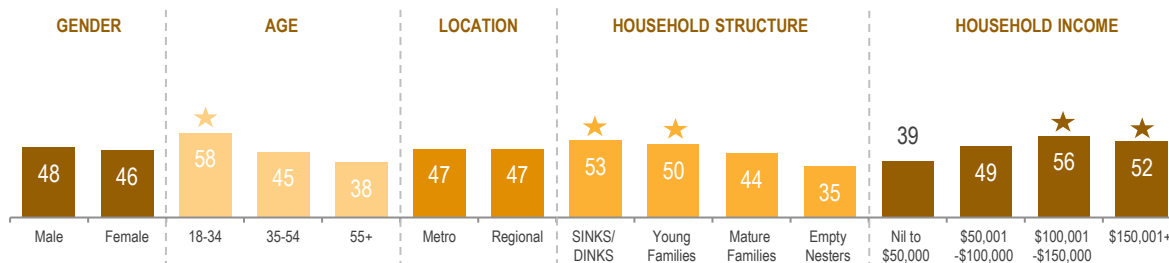
% Suitability of pubs / tavern / sports bar for precincts



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





Small bars

#4 most Visited

27% visited in the last 6 months

5% visited more than four times, 13% visited two or three times, 7% visited once

37%

The kind of venue I enjoy visiting

28%

Makes me more likely to visit a precinct

36%

Adds to the vibrancy of a precinct

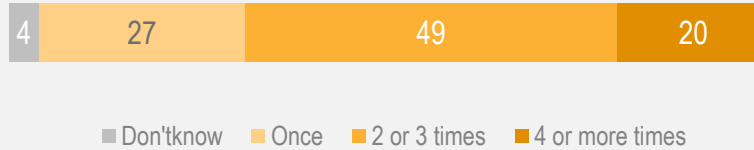
Base: All Respondents n=821

Small bars are the fourth most popular venue type to visit – with many people visiting with friends. Northbridge is the go-to precinct for small bars at the moment, but people would like to see more of them in Mt Lawley and Elizabeth Quay.

Small bars are also important, as they are the third most enjoyed venue type and the third most important venue type to drive precinct visitation.

While they are more enjoyed by females, desire for more small bars in the precincts is higher among males, as well as those aged 18-34.

Frequency of visitation



Base: Visited small bars in the last 6 months n=222

Travel party



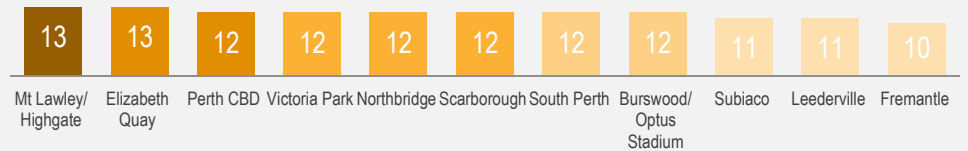
Base: Visited small bars in the last 6 months n=222



35% would like to see more

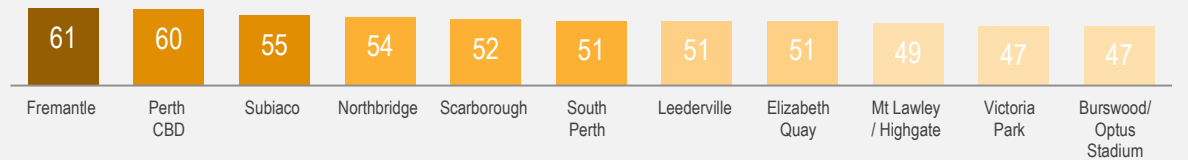
Base: All Respondents n=821

% Would like to see more small bars



Base: All Respondents n=821

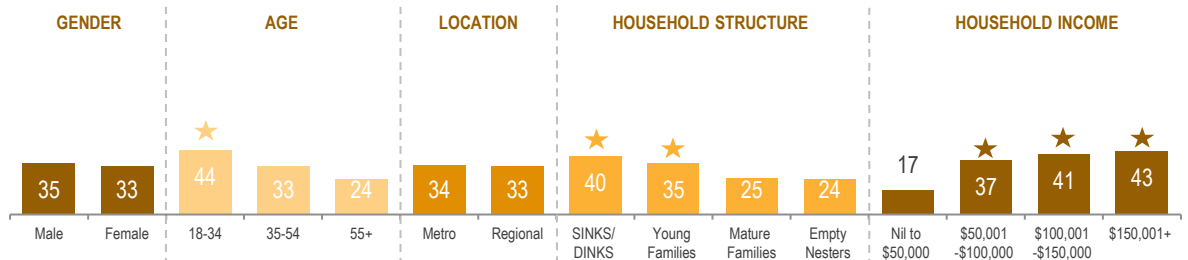
% Suitability of small bars for precincts



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





BYO restaurants

most
#5 Visited

20% visited in the last 6 months

4% visited more than four times, 10% visited two or three times, 5% visited once

34%

The kind of venue I enjoy visiting

26%

Makes me more likely to visit a precinct

28%

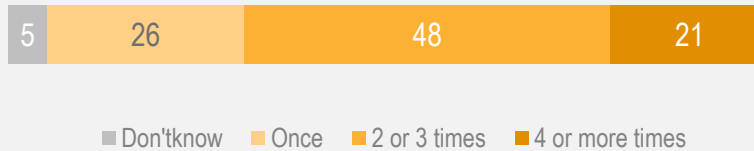
Adds to the vibrancy of a precinct

Base: All Respondents n=821

BYO restaurants are more appealing to and a bigger drawcard among older age groups – with those aged 35+ more likely than younger people to mention that the presence of BYO restaurants increases their likelihood to visit a precinct.

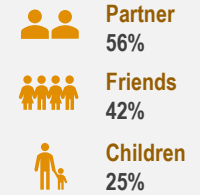
However, comparing back to 2017, BYO restaurants saw the greatest fall in visitor numbers among all other venue types. As of 2022, visitation to BYO restaurants is highest in Victoria Park, with close to 1 in 5 who recently visited the precinct going to a BYO restaurant.

Frequency of visitation



Base: Visited BYO restaurants in the last 6 months n=164

Travel party



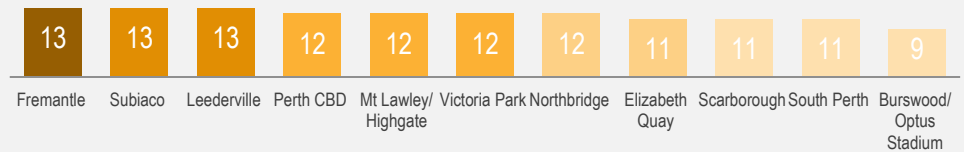
Base: Visited BYO restaurants in the last 6 months n=164



34% would like to see more

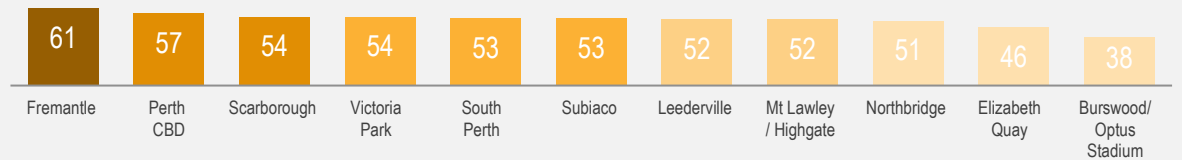
Base: All Respondents n=821

% Would like to see more BYO restaurants



Base: All Respondents n=821

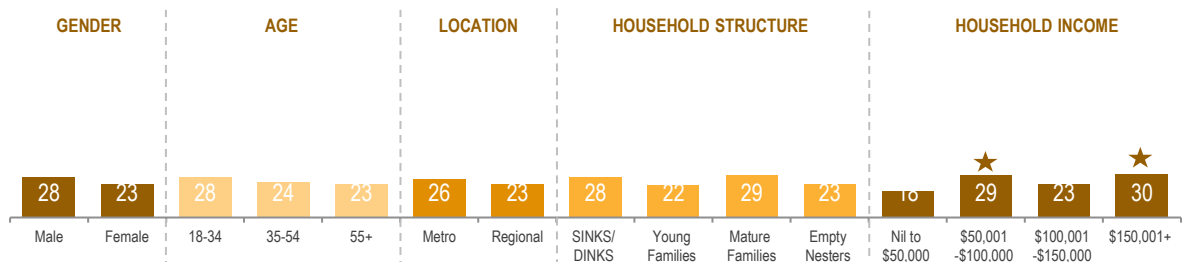
% Suitability of BYO restaurants for precincts



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





Hotels (with on-site accommodation)

most
#6 Visited

20% visited in the last 6 months

4% visited more than four times, 6% visited two or three times, 9% visited once

27%

The kind of venue I enjoy visiting

19%

Makes me more likely to visit a precinct

20%

Adds to the vibrancy of a precinct

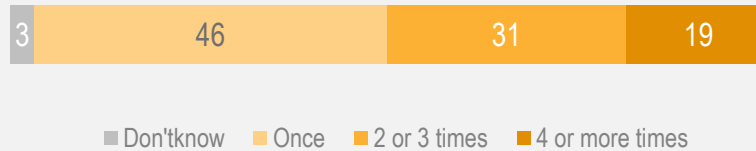
Base: All Respondents n=821

The community is keen to visit hotels with on-site accommodation, with these hotels being the only venue type where intentions to visit have increased compared to levels seen in 2017.

While hotel visitation is currently highest in Burswood / Optus Stadium, people mention that the suitability for hotels is highest within Perth CBD – and desire for more hotels is greatest in Fremantle.

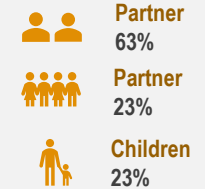
Those who'd like to see more hotels across Perth's entertainment precincts tend to be those aged 18-34.

Frequency of visitation



Base: Visited hotels in the last 6 months n=168

Travel party



Base: Visited hotels in the last 6 months n=168



30% would like to see more

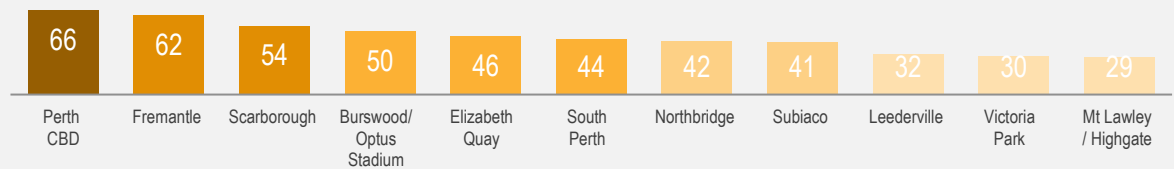
Base: All Respondents n=821

% Would like to see more hotels



Base: All Respondents n=821

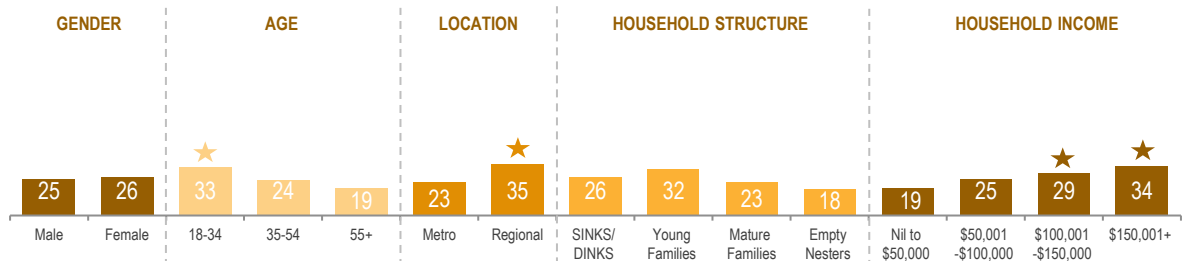
% Suitability of hotels



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





Nightclubs

#7 most Visited

17% visited in the last 6 months

3% visited more than four times, 6% visited two or three times, 7% visited once

10%

The kind of venue I enjoy visiting

10%

Makes me more likely to visit a precinct

19%

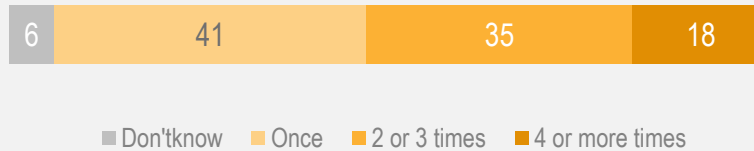
Adds to the vibrancy of a precinct

Base: All Respondents n=821

Males and those aged 18-34 have the biggest demand for nightclubs in Perth entertainment precincts – and while they are considered most suitable for Northbridge, demand and future visitation intentions to nightclubs are generally low across all precincts (because of their niche appeal).

Priority should be given to other venue types over nightclubs, as they are rated the lowest in terms of visitation enjoyment, increasing the vibrancy of a precinct and increasing likelihood to visit a precinct.

Frequency of visitation



Base: Visited nightclubs in the last 6 months n=140

Travel party



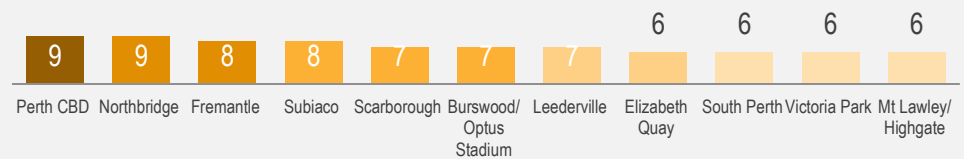
Base: Visited nightclubs in the last 6 months n=140



24% would like to see more

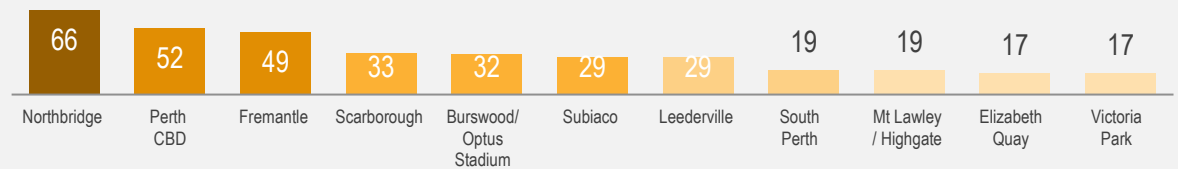
Base: All Respondents n=821

% Would like to see more nightclubs



Base: All Respondents n=821

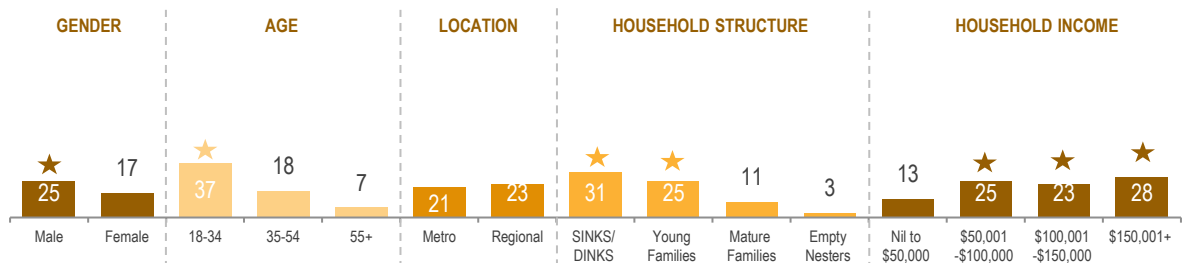
% Suitability of nightclubs



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





Pop up bars / other seasonal venues

most
#8 Visited

14% visited in the last 6 months

3% visited more than four times, 5% visited two or three times, 6% visited once

28%

The kind of venue I enjoy visiting

25%

Makes me more likely to visit a precinct

42%

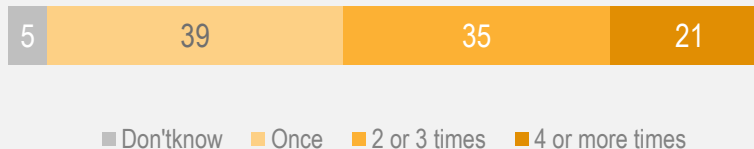
Adds to the vibrancy of a precinct

Base: All Respondents n=821

Pop-up bars and seasonal venues are key to increasing a precinct's perceived vibrancy. Elizabeth Quay is most known for pop-up bars and seasonal venues, whereas Freo is seen as the most suitable precinct for this venue type.

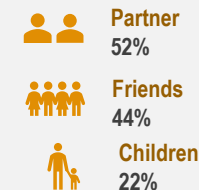
There is however less desire for pop-up bars and seasonal venues now compared to when in 2017 – likely due to an increase in them during the recent years.

Frequency of visitation



Base: Visited pop-up bars / other seasonal venues in the last 6 months n=118

Travel party



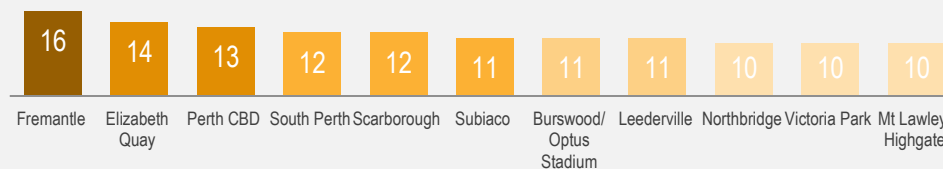
Base: Visited pop-up bars / other seasonal venues in the last 6 months n=118



34% would like to see more

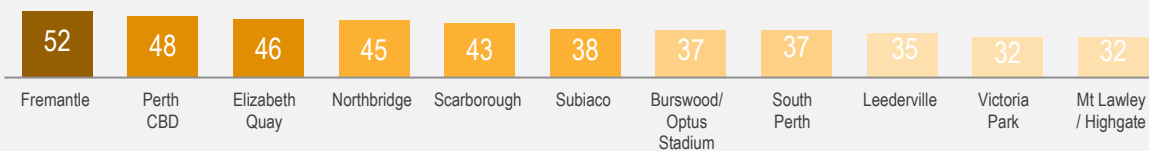
Base: All Respondents n=821

% Would like to see more pop-up bars / seasonal venues



Base: All Respondents n=821

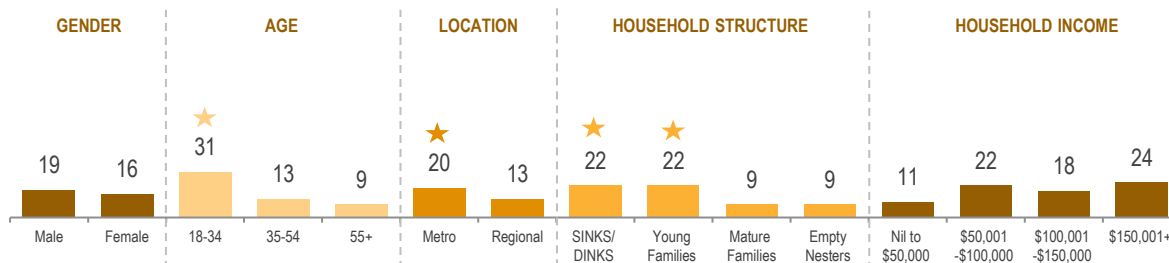
% Suitability of pop-up bars / seasonal venues

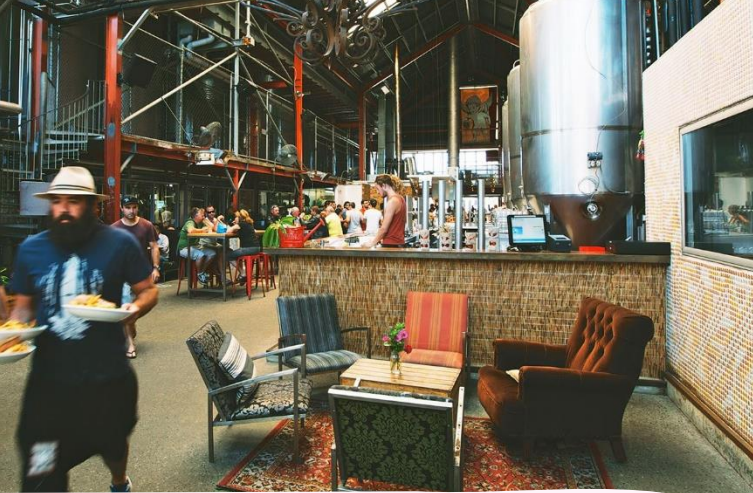


Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)





Microbreweries / Distilleries

most
#9 Visited

14% visited in the last 6 months

3% visited more than four times, 5% visited two or three times, 5% visited once

27%

The kind of venue I enjoy visiting

22%

Makes me more likely to visit a precinct

33%

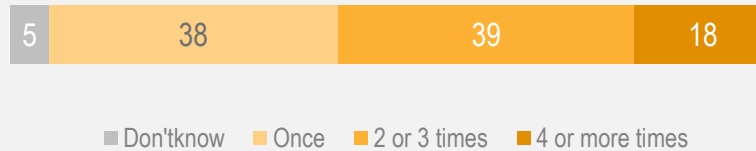
Adds to the vibrancy of a precinct

Base: All Respondents n=821

While only 14% of the WA community have visited a microbrewery or distillery in the last 6 months, there is a greater intention to visit them in the near future – in fact, 33% would like to see more of them across Perth's entertainment precincts. And Fremantle far exceeds all other precincts in terms of its suitability for more microbreweries & distilleries.

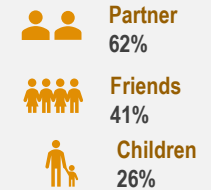
Desire for more of this venue type is greatest amongst those aged 18-54, and those aged 35-54 are more likely than others to feel that microbreweries & distilleries add to the vibrancy of a precinct.

Frequency of visitation



Base: Visited microbreweries / distilleries in the last 6 months n=114

Travel party



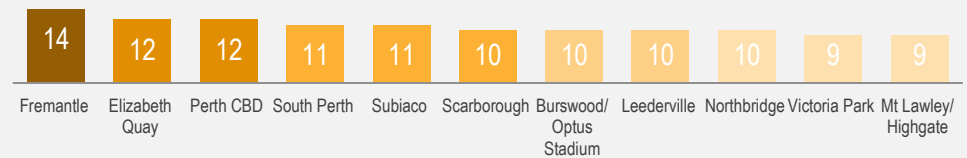
Base: Visited microbreweries / distilleries in the last 6 months n=114



33% would like to see more

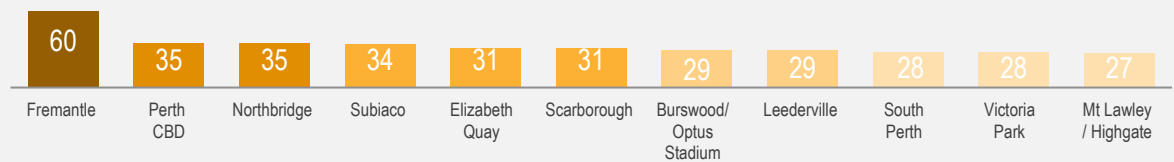
Base: All Respondents n=821

% Would like to see more microbreweries / distilleries



Base: All Respondents n=821

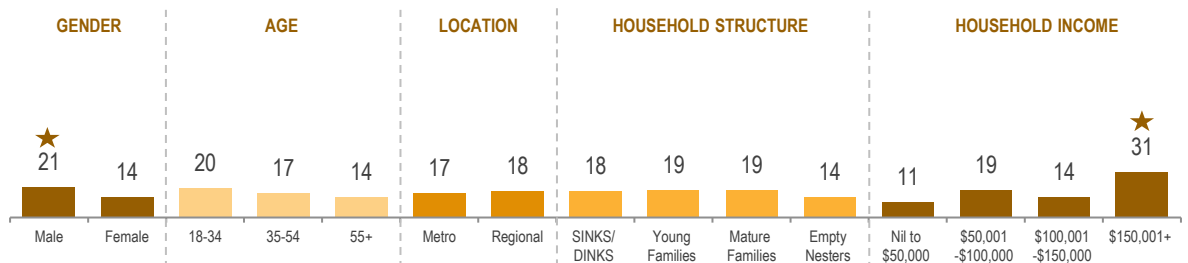
% Suitability of microbreweries & distilleries



Base: All Respondents n=821

Visitation: Past 6 months

Base: Visited at least 1 precinct in the last 6 months (n=656)



Key Insights



Precinct Visitation

- Freo and the CBD are the most visited precincts – both also holding the strongest future visitation intentions.
- Leederville and Mt Lawley / Highgate are the least visited, and visitation to these areas has fallen since 2017.
- Visitation to most precincts has fallen since 2017, the most so in the Perth CBD, likely due to COVID – except for Vic Park, where visitation has remained stable.

Precinct Perceptions

- Freo is seen as most vibrant and the precinct that offers the biggest range of venues.
- Perth CBD is seen as the most accessible precinct.
- Freo, EQ, South Perth and Burswood tie as the most safe precincts.
- Perceptions of Scarborough have improved most since 2017, however perceptions of Northbridge have deteriorated the most.

Venue Preferences

- Across all precincts, cafes and licensed restaurants are visited most.
- Cafes and licensed restaurants are also the most enjoyed venue types and make people most likely to visit a precinct.
- However, seasonal / pop-up venues bring the most vibrancy to a precinct.
- Cafes are the most in-demand venue type across Perth – highly desired in every precinct!

Licensed Venues

- Across all precincts, almost 1 in 2 went for a drink when they most recently visited. However, Northbridge is still considered the go-to precinct if going out for a drink.
- Licensed restaurants and small bars are particularly important to all precincts, as people not only enjoy visiting them, but they add vibrancy and make people more likely to visit the area.
- Around 1 in 4 recent visitors to most precincts spent at least \$50 on drinks – demonstrating the economic impact of licensed venues.

Driving Precinct Visitation

- There are many important factors for people when visiting a precinct – but a range of food / dining options is the strongest driver of visitation.
- People also like variety in what they can do while in a precinct (i.e. entertainment, venue types) – and for a precinct to be well-kept and have a good atmosphere.
- On the other hand, proximity is the biggest barrier to visitation, followed by suitability of venue types for personal needs / interests.

Profiling Visitors

- A diverse range of WA residents visit each precincts – however the most popular precincts (CBD, Freo & Burswood/ Optus Stadium) are visited more by those aged 25-44.
- Visitation across all precincts is strongest among metro residents and those with higher household incomes.
- There are some differences in precinct visitation by gender, with more males visiting Freo, Northbridge and Subi.



Hunt Smarter.

