Central City Users Survey

2006

A Market Research Report
to

City of Melbourne

Commissioned by: Austin Ley, Boreak Sik
Nexus Contact: Gerry Kelly
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Contents

Introduction

This report presents the findings from two surveys undertaken on behalf of the City of Melbourne – a CATI survey of Victorian residents (except postcodes 3000, 3006, 3008) 15 years of age and older, and an intercept survey of people 15 years of age and older in what has been termed the central city area of Melbourne, comprising the CBD, Southbank and Docklands (CCA). (See the map on the following page.)

The CATI survey (N = 2022 Victorians 15+ years of age) was conducted during the period 4/5/06 to 10/5/06 and questioned people, inter alia, about their visit, if any, to the CCA on the previous day. The questionnaire is in Appendix A.

The intercept survey was conducted during the period 06/05/06 to 15/5/06 across various sites around the central city area, again comprising people 15+ years of age. The survey questionnaire is included as Appendix B. A total of 2,780 interviews was achieved – 1,755 weekday, 1025 weekend.

As explained in the body of the report, the intercept survey data has been "weighted" to adjust for the differences between the achieved intercept sample and the "derived" visitor composition of the central city area on an average weekday and weekend day ascertained from the CATI survey and known figures provided by the MCC for central city residents, Tourism Australia's IVS Survey for overseas visitor numbers and NVS Survey for interstate and regional Victorian visitor numbers.

The Detailed Tables of Results (DTR) are provided in separate volumes.

Further details on the two survey methods are provided in later sections of this report.

Similar surveys were conducted in 2004. Where possible the 2006 results are compared with those of 2004. The main purpose of the surveys is to provide data to update the city users' estimates and forecasts model derived from the surveys themselves and from other sources (e.g. VATS, CLUE and the ABS).

Boundary Map
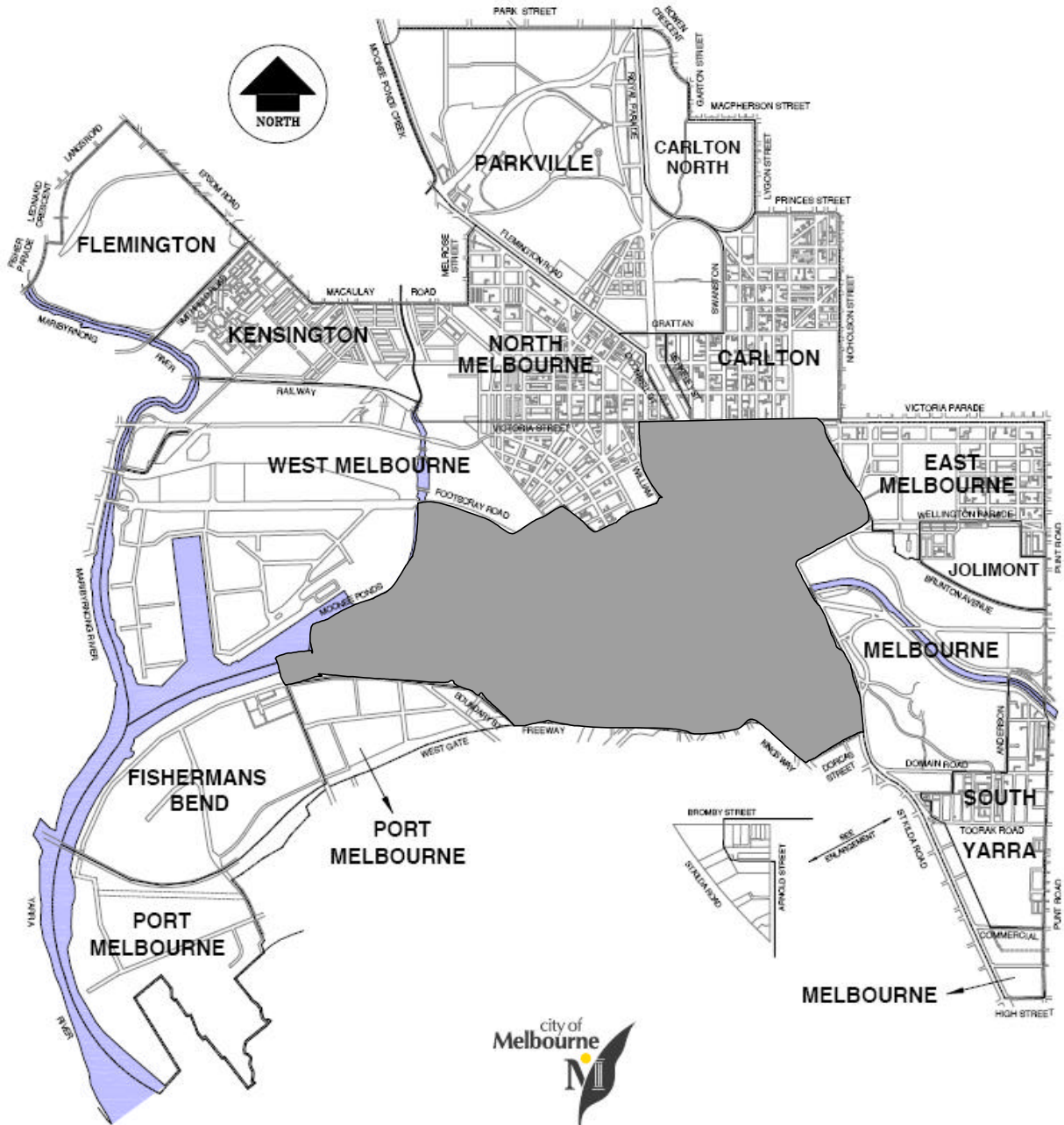
Objectives

The project aims at providing information on the "who", "where", "why", "what" and "how" aspects of city users. The main objectives of the survey are to:

1. provide reliable estimates of the numbers of the city users
   - on a typical weekday, Saturday and Sunday;
   - for typical day and night times; and
   - by destination and origin.

2. obtain information on movement of the city users to different city precincts

3. obtain the following key information about the city users
   - demographic;
   - purpose and mode of transport to and around the city; and
   - activity patterns in the city.

It should be mentioned that although the objectives relate to a "typical" weekday, weekend day, etc., the fact is that the surveys on which the findings are based are conducted during a one week period – one week of out fifty two in a year. Accordingly, they represent a "snapshot in time". Whilst residents, students and worker numbers are likely to be consistent throughout most of the year (except holiday times), regional, interstate and overseas visitor numbers and composition are likely to be affected by city events, conferences, shipping arrivals, retail sale weeks and so on.

CATI Survey Details

Introduction

The main purpose of the CATI survey was to ascertain

- the number of Victorians 15+ who live outside the Central City area (i.e. CBD, Docklands, Southbank) who travel to that area to their place of work on an average weekday and weekend day.
- the number of Victorians 15+ who live outside the Central City area who travel to that area to attend school/university/college on an average weekday and weekend day.
- the number of people 15+ who live in Metropolitan Melbourne, but outside the Central City area, who visit that area for other than work or study on an average weekday and weekend day.

At the same time, the opportunity was taken to ascertain:

- the activities undertaken by Central City visitors on an average weekday and weekend day.
- how often, over the course of a year, Victorians 15+ visit the Central City area.
- the mode of travel Victorians 15+ mainly use to travel to the Central City area.
- the extent to which and why Victorians 15+ may have changed their frequency of travel and/or mode of travel to the Central City area in the last year.
- the number of Victorians 15+ living outside the City of Melbourne (CoM) who visit the city on an average day and which suburbs are visited.

Sample

A stratified sampling process was used. On each of seven consecutive days, 285-292 interviews were conducted, proportional to Victorian SSD populations with an overall gender quota of 51 female/49 male and age quota 45 under 40 years/55 40+ years. The achieved sample is set out in Table 7 (Column 1 - age, gender, SD) and by day by SSD in the DTR volume.

The accuracy (sampling tolerance) of the sample is better than ±2% at the total sample level (N=2022). More details on this are set out in S.1.2 following (Table 5).

City Intercept Survey Details

Pedestrian counts were provided by the CoM for six city sites namely:

> 123 Swanston Street
>
> Princes Bridge
>
> Yarra Crossover (from Flinders Street Station to Southbank)
>
> 292 Bourke Street (Mall)
>
> Federation Square (Riverside)
>
> 295 Swanston Street

Counts were also conducted at various days and times at seventeen other sites by us, namely:

> New Quay
>
> Telstra Dome Concourse
>
> Southern Cross Station on Spencer Street
>
> Rialto Towers on Collins Street
>
> Crown Casino Concourse
>
> Arts Centre/Theatre area in St Kilda Road
>
> Parliament Station on Spring Street
>
> Southbank Promenade
>
> 101 Collins Street
>
> Little Collins Street (between Swanston & Elizabeth Streets)
>
> GPO (Elizabeth Street)
>
> Chinatown (Little Bourke St between Swanston & Russell Streets)
>
> Melbourne Central on LaTrobe Street
>
> RMIT on Swanston Street
>
> QVM on Elizabeth Street
>
> Flagstaff Station (LaTrobe Street)
>
> Law Courts (LaTrobe & Elizabeth Streets corner)

Based on these counts an interview schedule was set up by time, by day.

The final Sample of 2780 was achieved as follows:

	Weekday		Weekend	
	10am – 6pm	After 6pm	10am – 6pm	After 6pm
123 Swanston	192	93	48	120
Princes Bridge	75	39	46	17
Yarra Crossover	97	29	35	21
292 Bourke	110	12	31	21
Federation Sq.	14	0	7	5
295 Swanston	88	9	33	2
New Quay	8	7	10	6
Telstra Dome	19	0	78	0
Southern Cross	38	9	28	0
Rialto Towers	27	0	8	1
Crown Casino	38	42	59	20
Southbank	64	68	25	56
Arts Centre/Theatre	52	68	18	39
Parliament Station	31	9	4	7
101 Collins	79	2	12	17
Little Collins	65	1	37	0
GPO	77	12	29	28
Chinatown	49	33	22	33
Melbourne Central	72	20	36	35
RMIT	30	7	12	7
QVM	11	0	10	20
Flagstaff Station	52	0	1	0
Law Courts	17	0	1	0

A more detailed breakdown is provided in the DTR Volume.

The order of accuracy of the City Intercept Survey is ±2% or better for the total weekday sample (N=1755) and ±3% or better for the total weekend sample (N=1025).

Key Findings

1. There are 543,000 users of the central city area on an average weekday and 389,000 on an average weekend day, the latter figure being the average of 471,000 on a Saturday and 308,000 on a Sunday.

2. Workers attending their place of work or people undertaking work-related activities account for 39% (210k) of the central city users on a weekday and 11% (42k) on weekends. Students and those undertaking educational activities feature on weekdays 7% (40k), but are minimal on weekends, 1% (2k).

3. Casual visitors from the Melbourne metropolitan area are a very prominent group: 196,000 on weekdays and 248,000 on weekends visit the central city area.

4. 15,000 casual visitors from regional Victoria visit the central city area each day as do 31,000 overseas visitors and 26,000 interstate visitors.

Figure 1: CCA User Numbers (k)
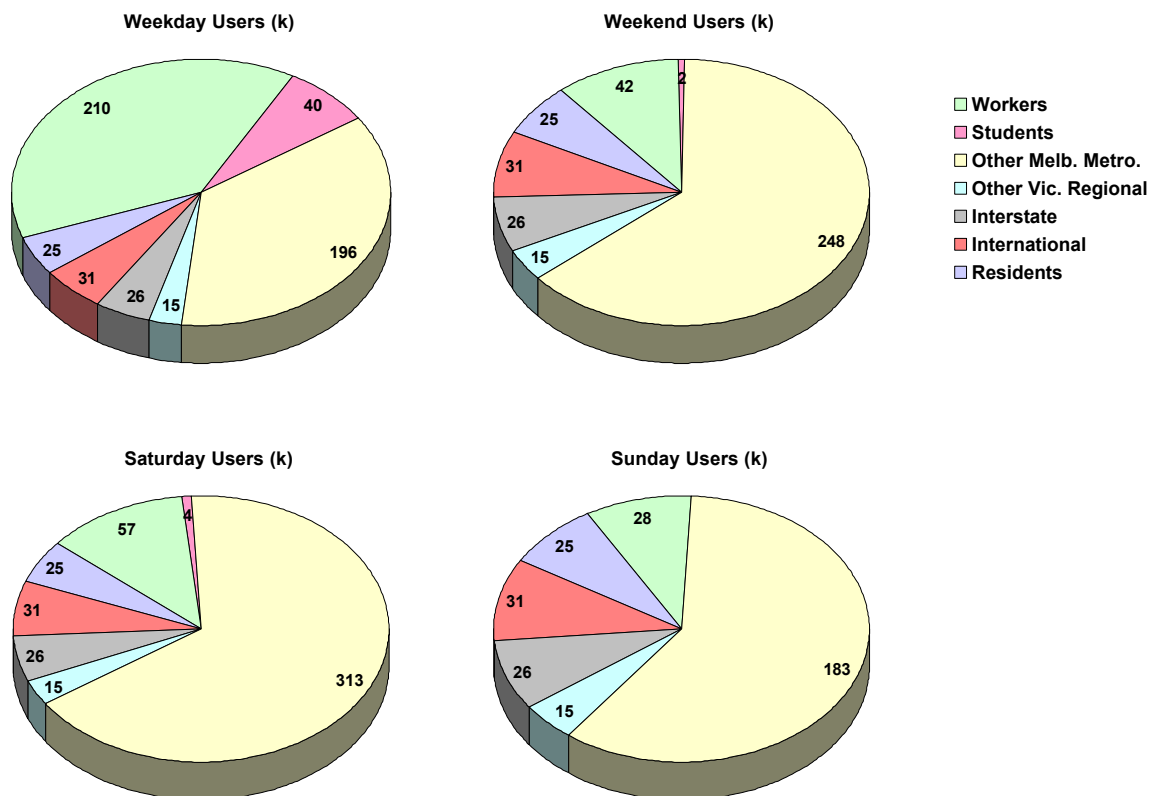
5. A high proportion of central city users are aged under 30 – around half. There is a slight male bias. Around six in ten users are full-time workers. There is little difference in these demographics on weekends compared with weekdays.

Figure 2: CCA Users by Age/Gender

Weekday Users Weekend Users
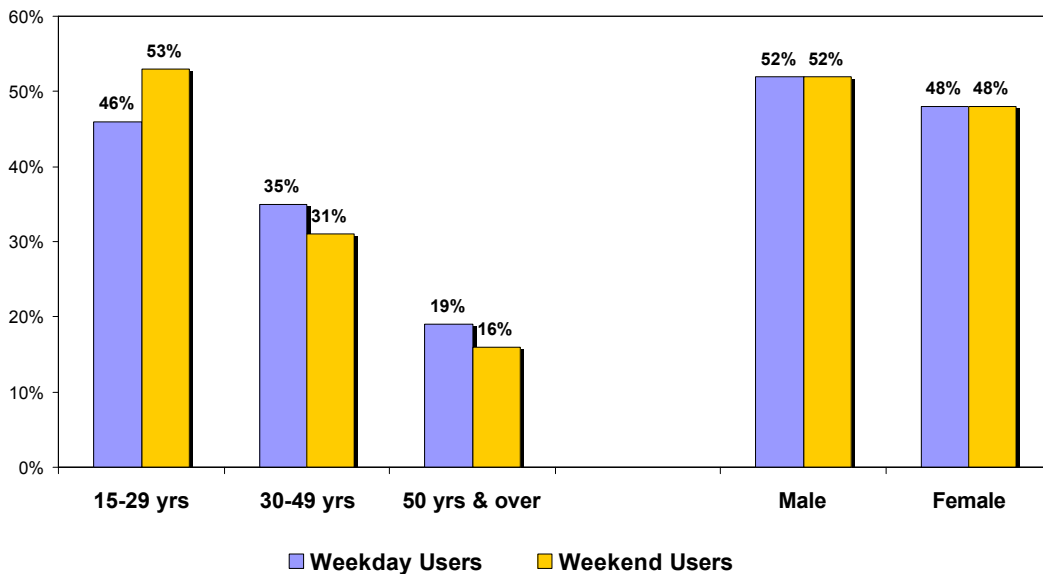
6. Chinese/Mandarin/Cantonese is the main LOTE spoken at home for Australia-based central city users. Slightly more than one in ten such users do not have English as their main language at home.

The UK/Ireland, NZ, India and China are the main birthplaces, other than Australia, of Australian-based central city users. (A third of such users are born outside Australia.)

7. 45% of non-central city resident students in the central city are overseas students. Also, 83% of central city residents who are students are overseas students.

8. The main origins of overseas visitors are the UK/Ireland, SE Asia, NZ and USA-Canada.

9. NSW/ACT is the main source of interstate visitors – about three in ten.

10. Around six in ten central city users from metropolitan Melbourne (excluding central city residents) come from four SSDs, namely:

> Inner Melbourne
>
> Western Melbourne
>
> Eastern Middle Melbourne
>
> Southern Melbourne

11. Trains (51%), cars (19%) and trams (21%) are the main weekday modes of transport to the central city.

    On the weekend, cars (30%) become proportionately more popular at the expense of trains (41%), but the latter are still the main mode.

Figure 3: Mode of Transport to CCA (%)

Legend: ■ Weekday Users ■ Weekend Users
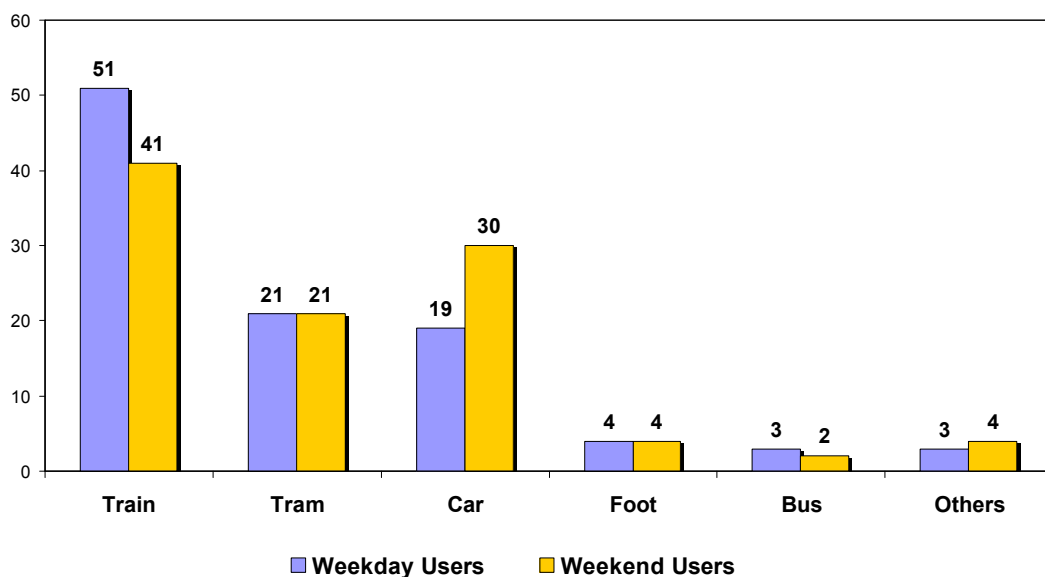
12. Foot is the predominant mode of travel around the central city on weekdays and weekends, being used by eight in ten users. Trams are used by around one in four users.

13. Seven in ten weekday users (71%) come to the central city on their own. On weekends, it's considerably lower (51%).

14. After work and education, the main reasons for being in the CCA on weekdays are:

> Shopping
>
> Meeting with/accompanying friends
>
> In transit
>
> Dining/eating/drinking
>
> Sightseeing

15. The weekend pattern is different, work is not so dominant at all and its importance is similar to:

> Shopping
>
> Spectator sport
>
> Live theatre/Ballet/Opera etc

Education visits to the CCA on weekends are minimal.

Figure 4: Top Ten Main CCA Activities (k)
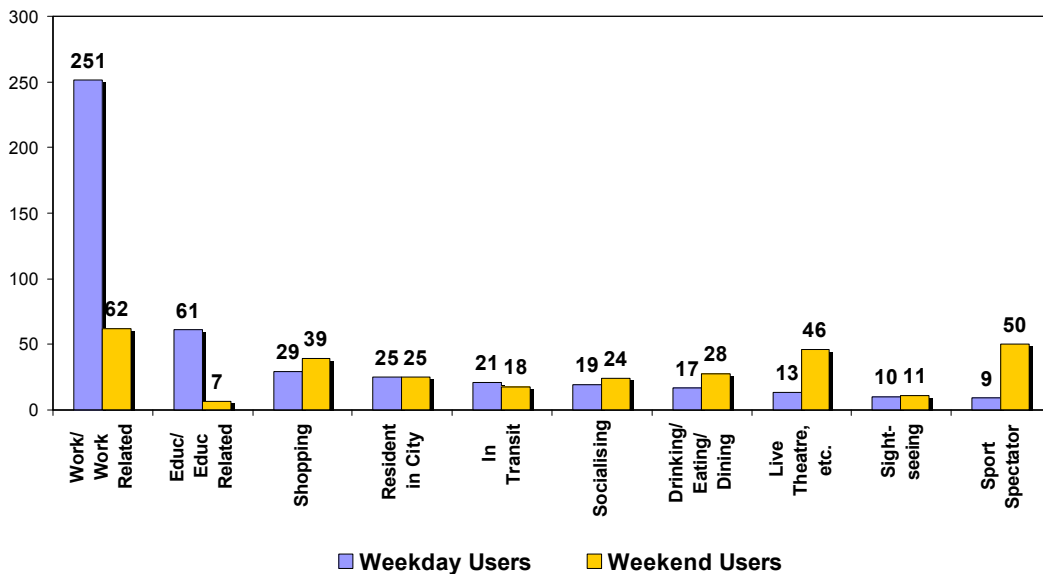
16. The main sightseeing areas are Southbank and Federation Square. The main specific sightseeing venues are:

        The Casino

        The Aquarium

        QV Markets

Figure 5: Top Ten Sightseeing Sites (%)
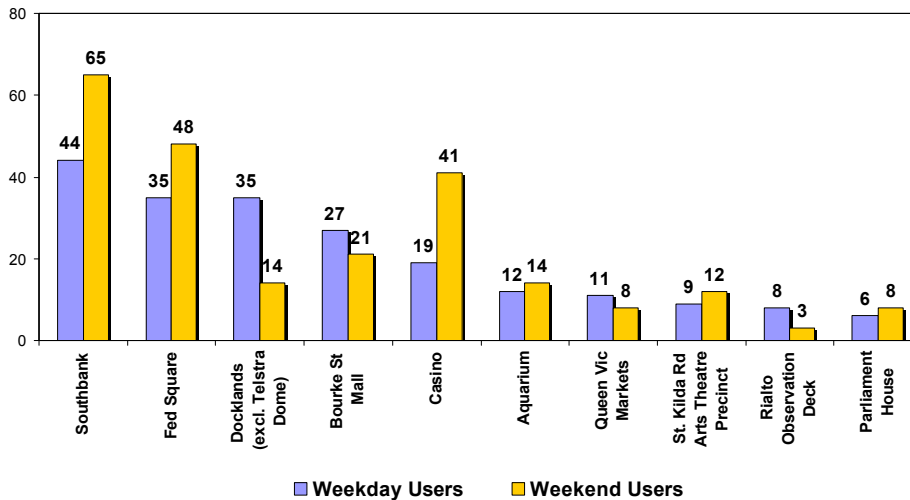
17. Three CCA precincts (see the map on page p.56) account for 60% of the weekday activity:

        The Central shopping/retail area

        SE CBD

        Southbank

Figure 6: CCA Precincts for Main Activity (%)
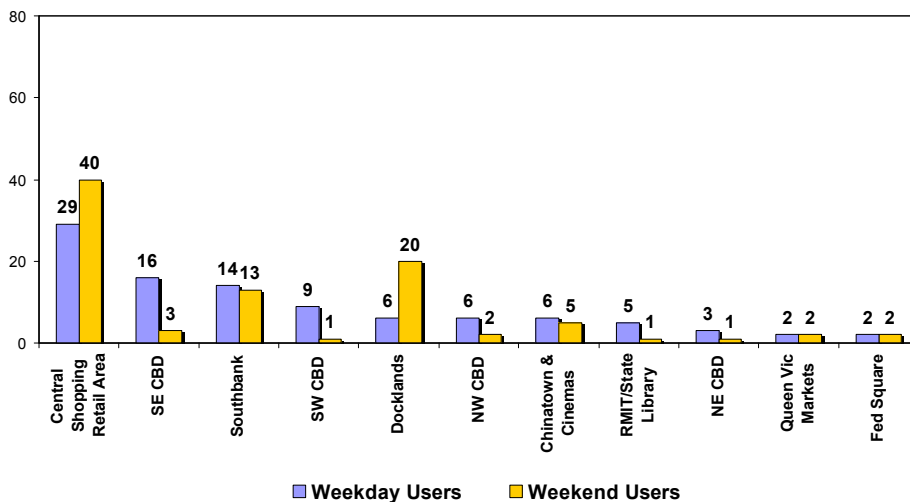
18. On the weekends, two precincts account for 60% of the activity:

> The Central shopping/retail area
>
> Docklands (mainly Telstra Dome)

19. Around three quarters of CCA users undertake a "secondary" activity on their visit, chief among those being:

> Dining/drinking
>
> Fast food purchase
>
> Shopping

20. When all activities (main and secondary) are taken into consideration, the four most widespread weekday activities are:

> Work
>
> Dining/drinking
>
> Fast food purchase
>
> Shopping

and on weekends are:

> Dining
>
> Shopping
>
> Fast food purchase
>
> Live theatre (61K)

Figure 7: Top Ten All Activities (k)
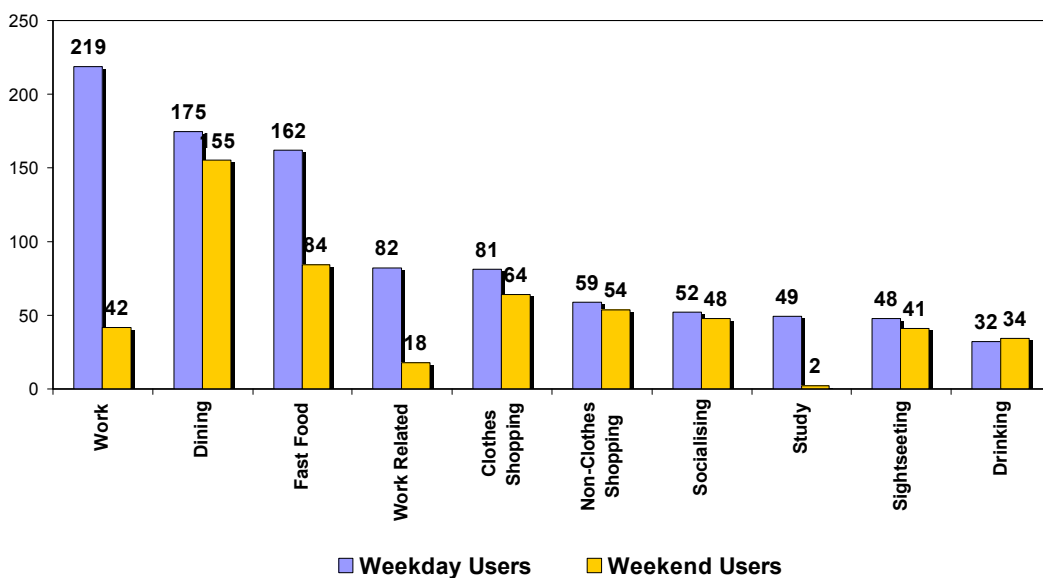
21. Excluding residents, workers and students, about one third of the main activities occur during the night (slightly less on weekdays than on weekends)

    Nightclubbing, Spectator Sport (Friday night) and also Cinema, Theatre and Dining are the activities where the majority occurs in the night time.

22. The mean weekday spend per CCA user is around $41. (The median is $15.) The mean weekend spend is around $63. (The median is $50.)

    These equate to $22.5m spent in the CCA on an average weekday and $24.5m on a weekend day.

    International and Interstate visitors are the big spenders.

23. Around 4% of Victorians indicated they'd changed from car to non car transport to the CCA in the last year. The main reasons for change is cost – almost equally fuel cost and parking cost – each equating to in excess of 50,000 Victorians.

    Among current Victorian CCA users, almost 2% indicated such change, again fuel cost and parking cost were equally prominent, each for around 5,500 CCA users per weekday and 2,000 per weekend day.

24. 18% of Victorians indicated they were travelling less often to the CCA within the last year. The main reason for this is change in home, work or personal circumstances. However, around 1% mentioned each of fuel prices and parking fees (61,000 and 32,000 respectively) as reasons for less travel.

    Among current Victorian CCA users, about 0.2% mentioned each of fuel prices and parking fees (each 1,000 per day) as reasons for less travel.

1. CATI Survey Results – CoM/CCA Visitor Numbers

1.1 Central City Workers, Students and other Visitors

The population of Victoria aged 15 years and over, is 4,128,098[1]. The population aged 15+ of the Central City Area (CCA) is 24,995[2] as follows:

CBD	12,339
Southbank	7,790
Docklands	4,866

Thus, the Victorian 15+ population residing outside the CCA itself is 4,103,103 as follows:

Remainder of City of Melbourne	36,725
Remainder of Metro Melbourne	2,949,937
Regional Victoria	1,116,441

These are the population figures which are used to project the CATI data into CCA visitors.

The percentage of people 15+ who visited the CCA and other CoM suburbs on an average day are set out in Table 1 and the total relevant raw survey numbers in Table 2. These extrapolated to:

- 614,900 Victorians (15+ years of age, excl. CoM residents) visiting CoM
- 418,000 Victorians (15+ years of age, excl CoM residents) visiting CCA as their main area
- 196,800 Victorian (15+ years of age, excl. CoM residents) visiting CoM other than the CCA as their main area
- 16,200 CoM residents visiting the CCA

(1) DSE. Victorian Future (2004) Population Projections
(2) CoM. City Residents Projection, adjusted to 15+ by (1)

Table 1: CoM Suburb Visited (CATI Survey)

	Non CCA Residents % (2022)	
	Visited	**Main Area Visited**
CBD	9	8
Docklands	2	1
Southbank	2	1
St Kilda Road	3	1
East Melbourne/Jolimont	2	1
Lygon Street	2	1
North Melbourne	1	1
Parkville/MU	1	1
West Melbourne	1	*
Kensington	1	*
Visited CCA (any one of CBD/ Docklands/ Southbank)	11	11
Visited any one of the other CoM suburbs	9	5

(under 0.5%)

Table 2: CoM Victorian Visitors

	No.
Visited CCA (from non CoM suburbs and regions)	206
Visited CCA (other CoM residents)	8
Visited other CoM (from suburbs and regions)	97
Total CoM visitors	**303**
Total Sample	**2022**

1.2   CCA Visitation

Table 3 sets out the raw data from the CATI survey. The extrapolation is set out in Table 4.

Table 3: CCA Users – Main Purpose

	Weekday (1442)			Weekend (580)		
	Total	Metro	Regional	Total	Metro	Regional
Workers:						
CBD	68	66	2	4	4	0
Southbank	4	4	0	1	1	0
Docklands	2	2	0	1	1	0
Students:	14	13	1	0	0	0
Other Victorian Visitors:						
CBD	52	49	3	28	23	5
Southbank	15	13	2	5	4	1
Docklands	9	7	2	11	8	3
TOTAL	**164**	**154**	**10**	**50**	**41**	**9**

Table 4: CCA Daily Visitor Numbers (Main Purpose)

	Weekday	Weekend
Workers:		
CBD	193,500	28,300
Southbank	11,400	7,100
Docklands	5,700	7,100
	210,400	**42.400**
Students:	**39,800**	**2,000***
Other Reasons (from Melb. Metro)		
CBD	139,400	162,700
Southbank	37,000	28,300
Docklands	19,900	56,600
	196,300	**247,600**

*   It should be mentioned that for the weekend, 1 person in the CATI survey represents 7,100 Victorians. Although, we encountered no weekend students in the CATI survey, we know they do exist. (Indeed, ten were encountered in the City Intercept Survey). The probability is that we would have encountered one student in the CATI survey if there were 4,000 or more weekend students in the CCA. Thus, we have put the number of CCA weekend students at half this number, ie. 2,000.

Caution should be exercised in considering the figures in Table 4. There is an unavoidable sampling tolerance in all (non census) surveys. At the 90% Confidence Level the CATI survey's sampling tolerance is ±1.11% and better for the relevant CCA user numbers for the whole week, ±1.38% and better for weekdays and ±1.77% or better for weekend days. However, because the sample is being extrapolated to over 4m, these small tolerances represent tens of thousands of people as shown in Table 5 (1% is equivalent to around 40,000).

Table 5: Sampling Tolerances (90% Confidence Level)

	Total (2022)				Weekday (1442)				Weekend (580)			
	%	% Tol	No. (k)	Tol (k)	%	% Tol	No. (k)	Tol (k)	%	% Tol	No. (k)	Tol (k)
Workers	4	±0.75	164	±31	5	±0.96	210	±39	1	±0.69	40	±28
Students	1	±0.37	41	±15	1	±0.43	40	±18	n.a.			
Other Metro	5	±0.81	205	±33	5	±0.96	196	±39	6	±1.65	248	±68
Total	10	±1.11	402	±46	11	±1.38	447	±57	7	±1.77	290	±73

1.3   CCA Activities

Table 6. sets out the non-work/study main activities undertaken by Victorian CCA visitors.

The main CBD activities are:

- shopping
- work related purposes (weekdays only)
- dining
- theatre/cinema
- nightclub/pub visits
- sightseeing

For Southbank it's:

- dining
- theatre/cinema
- sightseeing
- nightclub/pub visits
- the Casino

For Docklands, it's:

- Telstra Dome (AFL)
- dining
- sightseeing

Table 6: Main Activities

	CBD		Southbank		Docklands		Total
	No	Extrapol-ation ('000)	No	Extrapol-ation ('000)	No	Extrapol-ation ('000)	Extrapol-ation ('000)
Weekday (1,442)							
Work related purposes	8	23	1	3	1	3	29
Shopping	10	28	0	0	1	3	31
Theatre/Cinema	7	20	2	6	0	0	26
Dining	8	23	3	9	1	3	35
Takeaway/Fast food	1	3	0	0	0	0	3
Sightseeing	5	14	4	11	0	0	25
Nightclub/Pub	4	11	1	3	0	0	14
Visiting	2	6	1	3	1	3	12
In-transit	1	3	0	0	1	3	6
Dropping family off	2	6	0	0	0	0	6
Personal Business	2	6	0	0	0	0	6
Casino	0	0	3	9	0	0	9
Telstra Dome	0	0	0	0	4	11	11
Other	2	6	0	0	0	0	6
Weekend (580)							
Shopping	8	57	0	0	0	0	57
Theatre/Cinema	5	35	1	7	0	0	42
Dining	4	28	2	14	1	7	49
Sightseeing	2	14	0	0	1	7	21
Nightclub/Pub	3	21	1	7	1	7	35
Visiting	2	14	0	0	1	7	21
In-transit	1	7	0	0	1	7	14
Dropping family off	1	7	0	0	0	0	7
Casino	0	0	1	7	0	0	7
Telstra Dome	0	0	0	0	6	42	42

1.4   Demography

Compared with the sample (Victorian population) as a whole, it is evident the CCA visitors are more likely to be:

- Male
- 20-29 years of age
- In the workforce
- Melbourne metro area residents

Table 7: Demography

	%	
	Sample (2022)	**CCA Visitors (214)**
Male	49	64
Female	51	36
15-19 yrs	7	7
20-29 yrs	14	36
30-39 yrs	21	25
40-49 yrs	14	12
50-59 yrs	16	11
60-69 yrs	12	6
70 yrs and over	15	3
Student	10	14
Labour force	53	75
Home duties	10	5
Retired	25	6
Unemployed	2	*
SD		
Melbourne	73	91
Barwon	5	3
Western District	2	1
Central Highlands	3	2
Wimmera	1	*
Mallee	2	*
Loddon	4	*
Goulburn	4	1
Ovens-Murray	2	*
East Gippsland	2	1
Gippsland	3	*

(Less than 0.5%)

1.5   Frequency of CCA Visitation

The frequency with which Victorians, 15+ claim to visit the CCA is set out in Table 7.

The average (mean) frequency is 42.6 visits per year from Metro Melbourne residents and 11.0 from regional residents. The Median levels are 8.6 visits p.a. from Metro Melbourne residents and 2.8 visits p.a. from regional residents.

The average (mean) visits extrapolate to

- 127,232,000 p.a. or 349,000 p.d from Metropolitan Melbourne residents
- 9,601,000 p.a. or 26,300 p.d. from regional (non-Melbourne) residents

Table 8: Frequency of CCA Visitation

Days per	Metropolitan Melbourne (1,475)		Regional Victoria (541)	
	%	No	%	No
338 (6-7 days p.w.)	5	68	1	5
260 (5 days p.w)	4	56	0	2
156 (2-4 days p.w.)	5	72	1	6
52 (once a week)	8	124	2	12
17.5 (15-20 p.a.)	11	169	6	33
12 (10-14 p.a.)	14	205	9	47
7 (5-9 p.a.)	11	163	14	75
3 (2-4 p.a.)	19	283	25	135
1 (1 p.a.)	10	142	18	97
0.5 (Less than once a year)	5	68	4	44
0 Never	8	125	16	85

The total figure of 375,300 Victorian visitors per average day compares favourably with the 418,000 derived from the "yesterday" estimate set out in Section 1.1.

2. CATI Survey Results – Travel

2.1   Mode of Travel to CCA

The principal last normal mode of travel into the CCA is the car for both Melbourne and regional residents, more so for the latter than the former. Public transport is used by just under half of Melbourne residents.

Table 9: Mode of Travel to CCA

	%			
	Metropolitan Melbourne (1,387)		**Regional Victoria (480)**	
Car as Driver	41		49	
Car as Passenger	8		19	
Train	22		12	
Train – park	12		10	
Tram	8	46	1	27
Tram – park	2		1	
Bus	2		3	
Foot	2		1	
Taxi	1		1	
Bicycle	1		*	
Other	1		1	
Varies/no pattern	1		1	

2.2   Change in Travel Mode to CCA

Nearly one in ten people changed their mode of travel to the CCA in the last year (8%), just half of these (4%) changing from the car to non-car transport.

Table 10: Changed Travel Mode in Last Year

	% (1867)
Changed mode in last year	8
Changed from car to non-car	4
Changed from public transport	2
Changed within mode	2

The main reason for changing from the car is the expense, and both fuel prices and the cost of parking were mentioned almost equally in this context. In total, 1.3% of Victorians 15+ mentioned each of fuel costs and parking costs (including congestion levy) as reasons for changing from the car for their travel to the CAA (i.e. 53,000 Victorians each).

Table 11: Why Changed Travel from Car

	% (39)	% (79)
Cost of Travel		49
Fuel prices	69	
Parking cost	59	
Congestion levy*	8	
Public transport concession	13	
Lack of parking		16
Better convenience/ease in other forms		8
Traffic		3
Safety reasons		3
Fitness/health (walk)		3
Personal reasons/circumstances		35

* 4% of respondents (3 people) who changed their travel mode from car to non-car stated that this change was due to the congestion levy

Table 12: Why Changed Travel from
Public Transport

	% (36)
Cost	17
Have licence now	17
Too slow	6
Convenience/Easier	6
Fitness/heath (walk)	3
Safety reasons	3
Personal reasons/circumstances	42

2.3 Change in Travel Frequency to CCA

Nearly two in ten people (18%) are travelling to the CCA less often than last year, whilst just over one in ten (12%) are travelling more frequently.

Table 13: Frequency of travel to CCA compared with last year

	% (2022)
Travelling the same	69
Travelling more often	12
Travelling less often	18

By far the most prominent reasons for change in the frequency of travel to the CCA related to the change in personal circumstances (e.g. changed home, or work, left/started university etc) or personal reasons (health changes etc). In total, around 1.5% of Victorians mentioned fuel prices and 0.8% mentioned parking costs (including congestion levy) as a reason for travelling less to the CCA than last year (i.e. 61,000 and 32,000 respectively).

Table 14: Reasons for Frequency Change

More		% (236)
City events/activities		29
Local area declined		6
Better/more shopping		2
Personal reasons/circumstances		77
Less		% (363)
Cost of travel/expense		11
	% (41)	
Fuel prices	73	
Parking fees	37	
Congestion levy*	1	
Public transport costs	24	
Local area improved		7
Parking difficulties		6
Traffic congestion		4
Public transport declined		2
Too crowded		1
City activities changed, don't like it		1
Personal reasons/circumstances		75

* 0.3% of respondents (only one person) who reported to travel less frequently to the CCA stated that this change was due to the congestion levy.

3. Estimated Average Daily CCA Numbers

3.1 Tourism Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS) have been used to estimate the number of visitors to the CCA on an average day from

- regional Victoria
- overseas
- interstate

These detailed calculations are set out in Appendix C. However, they are summarised following.

3.2 <u>Regional Victorians</u>

The 2005 NVS figures for visitor nights and day trips have been used, with the following adjustments:

a) visitation for employment or education is excluded as these visitors are counted among workers and students respectively

b) an "overnight visit" to the CCA, in fact, means being in the CCA for two days; thus, the number of visitor nights needs to be adjusted to account for this (by adding the number of visitors responsible for those visitor nights to the number of visitor nights).

Thus, the total number of Victorian regional visits to the CCA per annum is:

	3126 k	visitor days comprising O/N stays in CCA (excl. Work & Education)
+	2439 k	day trips (excl. Work & Education)
	5565 k	

which equals to 15.2 k per day.

3.3   Interstate Visitors

The 2005 NVS figures for visitor nights and day visits to the CCA have been used. Additionally, the contribution from interstate visitors who stay outside the CCA but who come into the CCA on some days also needs to be added in.

The City Intercept survey indicates that interstate visitors to the CCA who stay in Metropolitan Melbourne (but outside the CCA) visit the CCA on 50% of their days, and those who stay in regional Victoria visit the CCA on 23% of their days. However, these are visitors who are actually in the CCA and therefore likely to overstate the CCA visitation level for all interstate visitors who stay elsewhere in Metropolitan Melbourne and regional Victoria, particularly for the latter. The CoM has revised the above percentages downwards to 25% and 2% respectively, the latter being such a large reduction because of additional analysis of NVS 2005 identifying the proportion of visitors to areas bordering NSW and SA who are unlikely to visit the CCA at all from these areas.

Thus, the total number of interstate visitors to the CCA per annum is:

	8046 k	visitor days comprising O/N stays in CCA (excl. Work & Education)
+	152k	day trips (excl. Work & Education)
+	1345 k	visitor days from interstate visitors staying in metro. Melbourne to the CCA
+	138 k	visitor days from interstate visitors staying in regional Victoria to the CCA
	9681 k	

which equates to 26.5 k per day.

3.4   International Visitors

The 2005 NVS figures for visitor nights have been used, using the same principle as those used for interstate visitors (see S.3.3).

Thus, the total number of overseas visitors to the CCA per annum is:

	8457 k	visitor days comprising O/N stays in CCA (excl. Work & Education)
+	2790 k	visitor days from overseas visitors staying in metro. Melbourne to the CCA
+	27 k	visitor days from overseas visitors staying in regional Victoria to the CCA
	11274 k	

which equates to 30.9 k per day.

3.5   The City of Melbourne's own 2006 population projections have provided the number of CCA residents s set out in S.1.1 earlier.

3.6   The CATI survey conducted by Nexus Research covered in S.1 earlier has been used to estimate the number of

- workers
- students and
- non worker-student visitors from the metro area.

These figures are set out in Table 4 previously for weekends and weekdays separately.

3.7   The breakdown and total number of CCA users for an average weekend day and weekday are set out in Table 15 as they are for 2004.

Table 15: Average CCA User Numbers

		Weekday ('000)		Weekend ('000)	
		2006	**2004**	**2006**	**2004**
A	**Resident**				
	CBD	12		12	
	Southbank	8		8	
	Docklands	5		5	
	Total	**25**	**22**	**25**	**22**
B	**Worker**				
	CBD	193		28	
	Southbank	11		7	
	Docklands	6		7	
	Total	**210**	**221**	**42**	**40**
C	**Students**	**40**	**44**	**2**	**1**
D	**Other Metro Melbourne Visitors**				
	CBD	139		163	
	Southbank	37		28	
	Docklands	20		57	
	Total	**196**	**175**	**248**	**182**
E	**Other Regional Vic Visitors**	15	13	15	13
F	**Interstate Visitors**	26	24	26	24
G	**Overseas Visitors**	31	31	31	31
	TOTAL	**543**	**530**	**389**	**313**

3.8   It should be explained that the 2004 numbers in Table 15, in the case of workers, regional visitors, interstate visitors and overseas visitors are not the same as those presented in the 2004 Central City Users Report[3]. In the case of the latter three visitor groups, a less rigorous analysis of the NVS and IVS appears to have been undertaken in 2004. The numbers in Table 15 for 2004 have been reworked using the same methods as 2006 (and are set out in Appendix C).

(3) *"Central City Users Survey 2004". Nexus Research. November 2004, P16*

In the 2004 CATI survey, respondents were asked about their visits to the CCA for the last seven days. In the 2006 survey, the more reliable and valid "yesterday" method was used. Although not directly comparable methodologically, the 2004 results were reworked considering not the last seven days, but the day before the interview was undertaken, ie. "yesterday".

In the case of students and "other visitors" and weekend workers there was no significant difference between the "seven day" and "yesterday" numbers, but the weekday workers extrapolation reduced from 250 k to 221 k. The latter figure is presented in Table 15.

3.9   We are unable to comment on the accuracy of the IVS and NVS data from which regional, interstate and overseas visitor numbers have been calculated. Neither are we able to differentiate between weekend day and weekday numbers for these groups.

The students, worker and other metropolitan visitor numbers are derived from a CATI survey where N=1442 for weekdays and N=580 for weekends. At the 90% Confidence Level, the sampling tolerance for this group of CCA users is ±1.1% for weekdays and ±1.8% for weekend days. These extrapolate to 46,000 weekday visitors and 73,000 weekend visitors (see S.1.2, Table 5). Thus, none of the differences between 2006 and 2004 are statistically significant at this level of confidence.

However, the weekend difference for Metro Visitors and hence the weekend Total are appreciable and noteworthy. There are two known contributions to this:

(i) The AFL practice in 2004 was for one weekend game at Telstra Dome. In 2006, it is, on most weekends, two games. This represents of the order of 50,000 additional visitors over a weekend or 25,000 for an average weekend day.

(ii) The 2006 survey was conducted on the last weekend of the 2006 Comedy Festival. Although no attendance numbers are to hand, CoM anecdotal evidence and pedestrian traffic monitors indicate large attendance numbers.

3.10 As indicated earlier, we have no way of differentiating the IVS and NVS data by day. However, the worker, student and other Melbourne metropolitan users for Saturday and Sunday separately can be extrapolated from the CATI survey (see Section A in Table 16 below).

On this basis, the number of workers, students and other Melbourne metropolitan users are greater on Saturday than Sunday, with the result that the CCA user numbers are 53% higher on Saturday (471 k) than Sunday (308 k) as shown in Table 16.

Table 16: Saturday v. Sunday CCA Usage

		Saturday		Sunday	
		CATI No. (288)	Pop'n ('000)	CATI No. (292)	Pop'n ('000)
A	Worker	4	57	2	28
	Student	0	4*	0	0
	Other Melb. Metro	22	313	13	183
		5		5	
B	Resident		25		25
	Regional Visitor		15		15
	Interstate Visitor		26		26
	International Visitor		31		31
	Total		**471**		**308**

*   *See note earlier at Table 4. The City Intercept survey encountered 9 Saturday students, and 1 Sunday student which puts 3,600 on Saturday and 400 on Sunday.*

4. Sample and Weightings for Intercept Survey Results

The total sample comprised 2,780 central city area users aged 15 years and over, as set out in the following table:

Table 17

	Weekday				Weekend Day			
	2004		2006		2004		2006	
	No.	%	No.	%	No.	%	No.	%
Central City Resident	159	9	106	6	34	5	76	7
Central City Worker	423	24	363	21	36	5	37	4
Central City Student	139	8	155	9	5	1	10	1
Overseas Visitor	147	9	159	9	62	9	86	8
National Visitor	151	9	216	12	120	17	145	14
Melb. Metro Visitor	612	35	630	36	380	55	574	56
Vic. Regional Visitor	95	6	126	7	58	8	97	9
	1,726		1,755		695		1,025	

The components of the sample by user group is very similar to that achieved in 2004. These sample groupings are compared with the weekend and weekday user groupings as derived in the previous section in the following table:

Table 18

	Weekday			Weekend Day		
	Sample	User Estimate		Sample	User Estimate	
	%	No. (k)	%	%	No. (k)	%
Resident	6	25	5	7	25	6
Worker	21	210	39	4	42	11
Student	9	40	7	1	2	1
Overseas Visitor	9	31	6	8	31	8
National Visitor	12	26	5	14	26	7
Melb. Metro Visitor	36	196	36	56	248	64
Vic. Reg. Visitor	7	15	3	9	15	4
TOTAL	**100**	**543**	**100**	**100**	**389**	**100**

The main feature of the sample composition when compared with the estimated CCA user profile is an undersampling of workers and an oversampling of other groupings. This is only to be expected. Workers are unavailable for interview for most of their time in the city (i.e. they are not on the streets, but in their workplace) and when available, their available time is usually short so refusal rates are high. Accordingly, the sample data is "weighted" to reflect the estimated user profile.

In most Tables following in this report (all from the Intercept Survey), we show both the "weighted" base (red) and the achieved sample (blue). The percentages are based on the "weighted" base.

The Detailed Table of Results also shows the "weighted" base and the achieved sample at the top of each Table and the percentages are based on the "weighted" base.

For convenience, the weighted "bases" have been set at the estimated user numbers in total and for each user group multiplied by 10^{-3}, so that each number in tables therefore represents 1,000 users.

5. Demography of City Users

5.1 Age

Table 19

	%			
	Weekday		**Weekend**	
	2004 **(1,726)** **(569k)**	**2006** **(1,755)** **(543k)**	**2004** **(695)** **(327k)**	**2006** **(1,025)** **(389k)**
Teens	11	12	13	17
20's	41	34	40	36
30's	20	19	17	20
40's	11	16	14	11
50's	11	12	9	10
60's	4	5	4	4
Over 70	2	2	2	2

See DTR Q.50

Around half the weekday users (46%) and weekend users (53%) are under 30 years of age which is similar to the 2004 picture. Such youthfulness in most evident among students (92% weekdays, 70% weekends) and residents (73%, 70%). The oldest group is interstate visitors with four in ten weekday interstaters (42%) and three in ten weekend interstaters (30%) being aged 50 years and over.

5.2 Gender

Table 20

	%			
	Weekday		**Weekend**	
	2004 **(1,726)** **(569k)**	**2006** **(1,755)** **(543k)**	**2004** **(695)** **(327k)**	**2006** **(1,025)** **(389k)**
Male	52	52	54	52
Female	48	48	46	48

See DTR Q.54

There is a slight male bias in users (52% weekdays and weekends) similar to 2004.

5.3   Occupational Status

There is very little difference in the occupational status of central city users on weekdays compared with weekends. Full-time workers comprise more than half the users. The pattern is similar to 2004.

Table 21

	%			
	Weekday		**Weekend**	
	2004 **(1,726)** **(569k)**	**2006** **(1,755)** **(543k)**	**2004** **(695)** **(327k)**	**2006** **(1,025)** **(389k)**
Full-Time Worker	58	57	56	52
Part-Time/Casual Worker	11	14	10	17
Full-Time Student	19	20	22	25
Part-Time Student	2	2	*	1
Retired	6	5	5	5
Unemployed	3	3	4	5
Home Duties	2	2	4	2

See DTR Q.53
* Less than 0.5%

6. Language Spoken by Central City Users

English is the main language spoken at home by central city users. If we exclude overseas visitors, it exceeds the 80% mark (for both weekends and weekdays), similar to 2004.

The main secondary languages (overseas visitors excluded) is Chinese/ Mandarin/Cantonese.

Table 22

	All Users (excl. overseas) %			
	Weekday		**Weekend**	
	2004 **(1,579)** **(533k)**	**2006** **(1,596)** **(512k)**	**2004** **(633)** **(291k)**	**2006** **(939)** **(358k)**
English	88	86	90	85
Chinese/Cantonese/Mandarin	3	4	1	6
Thai	1	1	*	1
Indonesian	1	1	1	2
Vietnamese	1	1	*	1
Indian	*	1	*	1
Korean	*	*	*	1
French	*	*	*	1
Hindi	*	1	2	*

See DTR Q.52
* Less than 0.5%

Only languages recording 1% or more on an average weekday or weekend day are recorded in this table.

The use of LOTE at home is highest among residents (41% weekday, 32% weekend) and students (41%, 30%).

Among overseas visitors, about a third (32% weekday and 38% weekend) speak a LOTE at home, German (8%, 7%) and Chinese/Cantonese/Mandarin (3%, 13%) being the largest groups encountered.

7. Country of Birth of Users

7.1   Two-thirds of central city users (excluding overseas visitors) are born in Australia.   Other origins are widespread, with only five – UK, India, NZ, China and Indonesia – accounting for more than 1% on both a weekday and weekend.   The main birthplaces of central city users from Australia are set out in the table below.

Table 23

| | All Users (excl. overseas) % | | | |
| | Weekday | | Weekend | |
	2004 (1,579) (533k)	2006 (1,596) (512k)	2004 (633) (291k)	2006 (939) (358k)
Australia	65	63	68	67
United Kingdom/Ireland	5	5	5	5
India	5	4	6	2
New Zealand	2	4	3	3
China	2	3	2	4
Indonesia	2	2	2	3
Malaysia	2	1	1	3
Thailand	1	1	*	1
Hong Kong	1	1	*	2
Sri Lanka	1	1	*	*
Philippines	1	1	1	1
Vietnam	1	1	*	*
South Africa	1	1	1	*
Italy	1	1	1	*
Singapore	1	1	2	1
USA	1	1	*	1
Korea	*	1	*	1
Greece	*	1	*	*
Canada	*	1	*	*
Germany	*	*	*	1
France	*	*	*	1
Taiwan	*	*	*	1
Turkey	*	*	*	1
Finland	*	*	*	1

See DTR Q.51

Only countries recording 1% or more on a weekday or weekend are recorded in this Table

7.2   Included in the above are international students. 45% of non CCA resident students are international students. China is the main origin. 83% of CCA resident students are international students. China, Indonesia and Malaysia are the main origins.

Table 24: International Students

	% International Students	
	CCA Resident International Students (5K)	Non CCA Resident International Students (18k)
Indonesia	33	1
Malaysia	23	3
China	21	41
Korea	9	4
Africa	5	2
USA	5	1
Singapore	4	1
India	0	17
Poland	0	6
Thailand	0	4
Other	0	11

DTR Q.9, 23

7.3   The main origins of overseas visitors to Melbourne are set out in the table below.

Table 25

	% Overseas Users			
	Weekday		Weekend	
	2004 (147) (36k)	2006 (157) (31k)	2004 (62) (36k)	2006 (86) (31k)
UK - Ireland	8	26	6	19
Other Western Europe	13	11	22	9
S.E. Asia	25	11	19	16
New Zealand	14	16	19	14
USA – Canada	14	9	17	18
India – Sri Lanka	6	3	8	1
Japan – Korea	6	5	6	1

See DTR Q.51

There has been a large increase in the proportion of UK-Ireland visitors since 2004. However, we caution taking this conclusion too far (see p.3). For example, the international component of the Comedy Festival audience is likely to be UK based.

We also believe the Japanese count is low. They are not accessible on the streets in the way of most other nationalities as they seem to be transported between their accommodation and venues by tourist buses and are controlled by their "guide" to a very large extent.

8. Interstate Users of the Central City

Table 26

	% Interstate Users			
	Weekday		**Weekend**	
	2004 **(151)** **(24k)**	**2006** **(212)** **(26k)**	**2004** **(120)** **(24k)**	**2006** **(145)** **(26k)**
NSW/ACT	33	28	33	29
Qld	24	24	17	14
Tas	15	12	14	23
SA	15	18	23	20
WA	10	14	12	10
NT	1	2	2	1

See DTR Q.25

More interstate visitors to the central city come from NSW/ACT than any other state – about 7000 on an average day.

Queenslanders are the second most common group on weekdays and Tasmanians on weekends (6,000 each).

9. Melbourne Metro and the Central City

Around eight in ten weekday city users (79%) and weekend city users (76%) come from the Melbourne Metropolitan area (excluding CCA residents). They come from all parts of Melbourne, with the following four SSDs accounting for nearly six in ten metropolitan users.

Table 27

	%	
	Weekdays	**Weekends**
Inner Melbourne (excl. CCA)	23	26
Western Melbourne	13	13
Eastern Middle Melbourne	12	8
Southern Melbourne	10	9

However, as well as considering origin SSDs on this contribution to the overall use of the CCA, it is also possible to look at an SSDs contribution to CCA use compared with its share of the metropolitan population:

Contribution more than three times population proportion:
- Inner Melbourne

Contribution above population proportion:
- Moreland City

Contribution similar to population proportion:
- Western Melbourne
- Metro – Wyndham
- Boroondara City
- Northern Middle Melbourne

All other SSDs contribution to CCA users is lower than their population proportions, especially the Peninsula, Frankston City, Greater Dandenong, Yarra Ranges A, these latter SSDs being those most distant from the CCA.

Table 28: Origin of Metro Users

SSD	Weekday No. (K) Worker	Student	Work rel. business	Other	Total	% (429k)	Pop % (2986k)	% (295k)	Weekend No. (K) Total	Other	Wkend bus	Student	Worker
City of Melbourne (excl. CCA)	8	5	1	13	27	6	1	10	30	26	0	*	4
Other Inner Melbourne	38	4	3	26	71	17	6	16	48	38	1	1	8
Western Melbourne	27	6	1	21	55	13	12	13	39	35	0	0	4
Melton – Wyndham	13	1	*	8	22	5	5	6	19	12	0	0	7
Moreland City	16	2	1	11	30	7	4	5	16	14	0	0	2
Hume City	7	1	*	7	15	3	4	3	9	6	0	0	3
Northern Centre Melbourne	8	1	*	3	12	3	5	3	8	6	0	0	2
Boroondara City	6	2	*	11	19	4	4	4	13	11	*	0	2
Eastern Middle Melbourne	24	3	2	21	50	12	12	8	24	21	*	*	3
Eastern Centre Melbourne	8	*	*	7	15	3	7	4	12	11	0	*	1
Yarra Ranges A	2	1	*	2	5	1	4	2	7	7	0	0	*
Southern Melbourne	17	6	1	18	42	10	11	4	26	26	0	0	*
Greater Dandenong	2	1	*	3	6	1	3	1	4	3	0	0	1
South Eastern Centre Melb.	7	1	1	9	18	4	7	4	13	12	*	0	1
Frankston City	1	*	*	3	4	1	3	1	3	2	0	0	1
Peninsula	2	*	1	1	4	1	4	1	2	1	0	*	1
Northern Middle Melbourne	12	4	*	18	34	8	7	7	22	18	*	*	4

See DTR Q.10, 16, 17, 24

A map of metropolitan Melbourne follows.

Metropolitan Melbourne
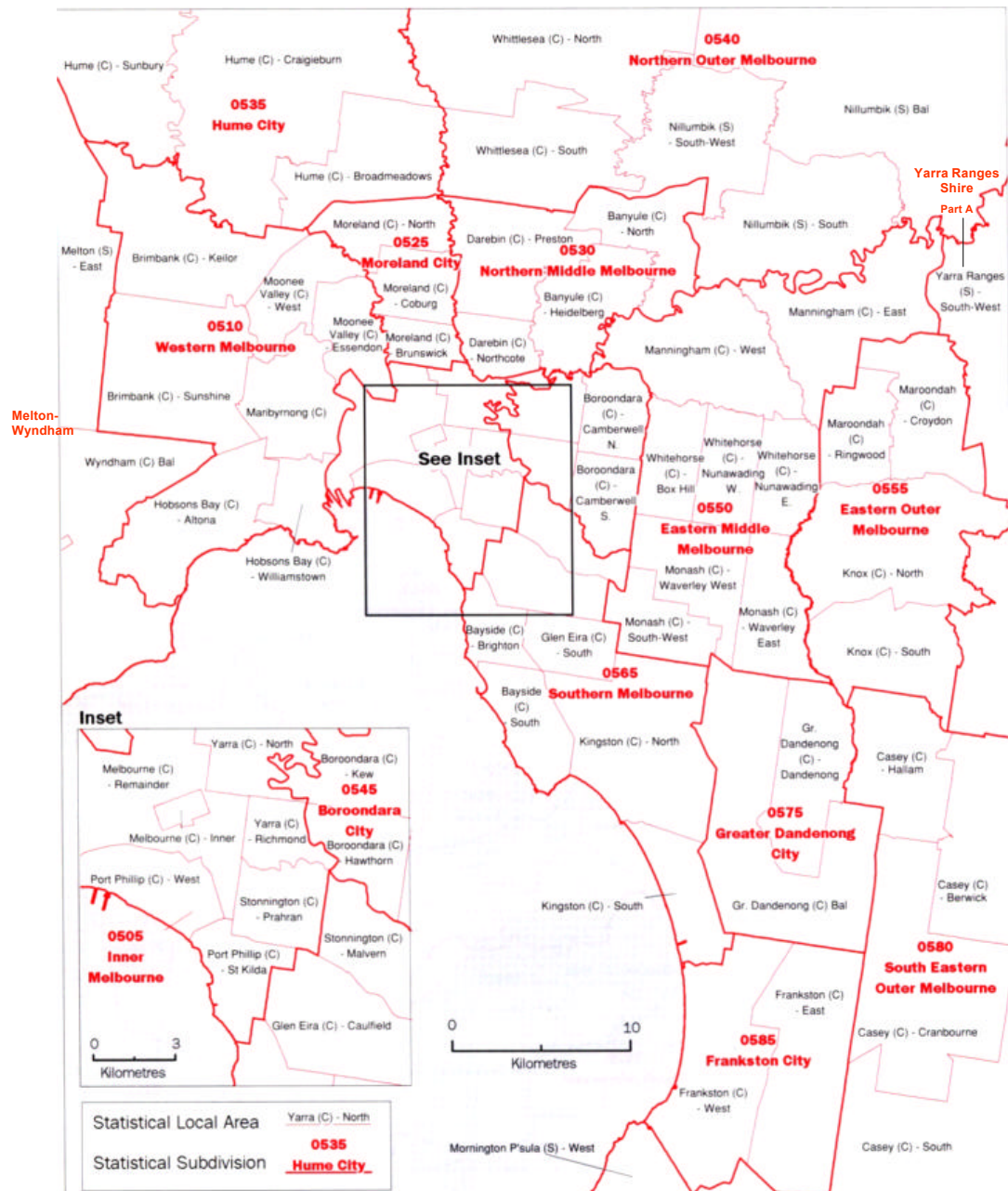
10. Origin of Visit

10.1 Weekday

Not surprisingly, in excess of eight in ten of all weekday journeys to the central city start at the user's home. For central city residents, workers and students and metro visitors, it is almost universal.

For overseas, interstate and non-metro visitors, central city and other metro accommodation is prominent. Direct from ship/airport also occurs. Direct from work/education facility also occurs for Victorian and interstate visitors.

Table 29

	%					
	Overseas Visitors		**Interstate Visitors**		**Regional Vic Visitors**	
	2004 (147) (36k)	**2006 (159) (31k)**	**2004 (151) (24k)**	**2006 (216) (26k)**	**2004 (95) (18k)**	**2006 (126) (15k)**
Accommodation in Central City Area	51	62	63	52	16	12
Elsewhere in Vic	41	35	24	44	82	85
Ships/Airport/ Bus Terminal	5	2	9	3	0	0
Work/Education	0	0	1	0	3	2

See DTR's Q.39

10.2 Weekends

Melbourne metropolitan residents' (central city and suburbs) journeys to the city almost universally started out at home. For other groups, as was found on weekdays, other origins also occur.

Table 30

	%					
	Overseas Visitors		**Interstate Visitors**		**Regional Vic Visitors**	
	2004 **(62)** **(36k)**	**2006** **(86)** **(31k)**	**2004** **(120)** **(24k)**	**2006** **(145)** **(26k)**	**2004** **(58)** **(22k)**	**2006** **(97)** **(15k)**
Central City Accommodation	70	64	63	68	18	15
Elsewhere in Vic	21	32	30	27	20	82
Ship/Airport	10	3	2	5	0	0
Work/Education	0	0	0	0	1	2

See DTR Q.39

11. Mode of Transport to the City

11.1   Weekdays

The train carries half (51%) the central city users (who come from outside the central city area) to the area each weekday. Cars (19%) and Trams (21%) each carry around two in ten.

The mode of transport used to get to the city on a weekday visit depends very much on the nature of the user, as shown in the table on the following page.

Interstate and overseas visitors, in the majority, as we saw earlier stay in the central city area. For those who don't, the tram is their main form of travel to the city. Walking is also prominent.

The car is most used by metro (23%) and regional (27%) visitors, but the train is the main form of transport for these groups (48% and 46% respectively) as it is for students (67%) and workers (53%).

The bus is stronger for regional visitors (10%) than other groups.

Table 31: Transport to City

	%						
	Total **(1,422)** **(482k)**	**Workers** **(361)** **(209k)**	**Students** **(153)** **(39k)**	**Metro** **Visitors** **(629)** **(196k)**	**Regional** **Visitors** **(111)** **(13k)**	**Overseas** **Visitors** **(61)** **(12k)**	**Interstate** **Visitors** **(103)** **(12k)**
Car – driver	14	15	4	15	18	2	6
Car – passenger	5	3	1	8	9	10	6
Train (parked at station)	12	15	6	10	14	0	2
Train (other)	39	38	61	38	32	23	22
Tram (parked at stop)	1	1	1	1	1	0	1
Tram (other)	20	18	19	20	9	43	35
Bus	3	2	3	3	10	3	5
Taxi	1	*	0	*	3	2	8
Motorcycle	1	2	0	*	0	0	0
Bicycle	1	2	1	1	1	2	0
Foot	4	4	5	3	3	16	15

See DTR Q.41
* Less than 0.5%

It appears that the use of the train appears to have increased at the expense of the car since 2004 among workers and students.

Table 32: Transport to City

	%			
	Workers		**Students**	
	2004 **(423)** **(250k)**	**2006** **(361)** **(209k)**	**2004** **(139)** **(44k)**	**2006** **(153)** **(39k)**
Car - driver	19	15	6	4
Car - passenger	4	3	5	1
Train	46	53	62	67
Tram	20	19	17	20
Bus	5	2	5	3
Taxi	*	*	0	0
Motorcycle	*	2	0	0
Bicycle	3	2	1	1
Foot	3	4	4	5

See DTR Q.41

11.2   Weekends

Transport to City

The car is used by a greater proportion of visitors on weekends compared to weekdays.

Table 33

	%	
	Weekend **(770)** **(319k)**	**Weekday** **(1,422)** **(482k)**
Car - driver	20	14
Car - passenger	10	5
Train	41	51
Tram	21	21
Bus	2	3
Taxi	2	1
Motorcycle	1	1
Bicycle	1	1
Foot	4	4

See DTR Q.41

11.3

The mode of travel profile for Victorian CCA users herein (Tables 31-33) is not directly comparable with that presented earlier in S.2.1. Table 9 for Victorians as a whole. The earlier data was for all Victorians and their "normal" mode of travel. The data herein is based on what CCA users used "today". The more frequently people visit the CCA the more likely they are to be in the CCA on a given day and therefore the more likely they are to be in the City Intercept sample. Given the prominence of the car in Table 9 compared with Tables 31-33, it seems that less frequent/occasional CCA visitors are more likely to use their car than frequent/regular visitors.

12. Transport around City

The vast majority of city users get around the central city by walking. This is the case across all visitor categories. The tram is used by around one in four users. There is little difference in the intra central city travel mode between weekdays and weekends.

Table 34

	%			
	Weekday		**Weekend**	
	2004 (1,726) (569k)	**2006 (1,755) (543k)**	**2004 (695) (327k)**	**2006 (1,025) (389k)**
Foot	87	81	90	79
Tram	26	23	22	26
Train	1	6	1	5
Car	5	3	3	5
Bicycle	1	1	2	1
Bus, Taxi, each	1	1	1	1

See DTR Q.35
(Multiple modes possible)

13. Accompanying Users

13.1 Weekday

Seven in ten (73%) users are in the central city area on their own, due, in large, to the heavy concentration of workers and students.

Table 35

	%																
	Total		**Residents**		**Workers**		**Students**		**Overseas Visitors**		**Interstate Visitors**		**Metro Visitors**		**Non-Metro Visitors**	
	2004 (1,726) (569k)	2006 (1,755) (543k)	2004 (159) (22k)	2006 (106) (25k)	2004 (423) (250k)	2006 (363) (210k)	2004 (139) (44k)	2006 (155) (40k)	2004 (147) (36k)	2006 (159) (31k)	2004 (151) (24k)	2006 (216) (26k)	2004 (612) (175k)	2006 (630) (196k)	2004 (95) (18k)	2006 (126) (15k)
Solus	71	73	70	73	87	95	83	74	46	36	30	27	57	64	47	44
Friends/ Relatives	15	13	19	24	4	2	14	18	24	28	28	21	25	18	20	19
Spouse/ Partner	10	9	10	1	3	3	1	5	23	30	34	40	13	9	25	21
Bus. Assoc/ Workmates	2	1	5	*	5	*	1	*	0	3	2	2	1	1	0	2
Family Group	2	4	0	3	0	*	1	3	7	4	5	9	4	6	3	5
Tour Group	1	1	0	0	0	0	0	0	1	1	1	*	2	2	5	8

See DTR Q.36

Among the genuine "visitor" groups, visiting with friends and relatives or a spouse/partner is also prominent – ranging from around six in ten (61%) for interstate visitors to three in ten (27%) for metro visitors. This pattern is similar to 2004.

13.2   Weekends

Solus travel to the central city on weekends is much less than on weekdays. Travel with friends/relatives, a family group or partner is proportionately nearly twice as common on weekends, a similar pattern to 2004.

Table 36

	%	
	2004 **(695)** **(327k)**	**2006** **(1,025)** **(389k)**
Solus	45	51
Friends/Relatives	30	24
Spouse/Partner	18	18
Bus. Assoc/Workmates	1	*
Family Group	6	7
Tour Group	0	*

See DTR Q.37

14. Main Purpose of City Visit

Going to work is the single most important reason for using the central city on an average weekday – 39% of users gave this as their main reason for being in the city. Another 9% of users nominated work related business as their main reason. In total, therefore, employment/work is the main reason almost half of the people in the central city are there.

The second most important reason for using the central city on an average weekday is education – 7% to attend their place of education, 4% on a study-related activity – more than one in ten users in total.

Shopping (7%), socialising with/meeting/accompanying friends (4%), in transit (5%), dining/eating/drinking (4%), sightseeing (6%) were the only other relevant main reasons for using the city by over 20,000 weekday users.

The weekend pattern is quite different. Work is nowhere near as dominant and education is minimal. Four prominent **main** reasons for using the city emerge for weekend visitors:

Shopping	(12%)
Spectator sport	(14%)
Work, Work Related	(14%)
Live Theatre/Ballet/Opera etc	(13%)

Other strong weekend reasons are:

Sightseeing	(7%)
Socialise with, meet, accompany friends	(7%)
Dining/eating/drinking	(9%)

all of which are undertaken by 25,000 or more weekend users.

Table 37: Main Reason for Using Central City

	%				No. (k) excl. l'state & O'seas	
	Weekday		Weekend			
	2004 (1,726) (569k)	2006 (1,755) (543k)	2004 (695) (327k)	2006 (1,025) (389k)	W'day 2006	W'end 2006
Work	44	39	14	11	210	40
Work-related	5	9	3	4	41	12
Education	8	7	*	1	40	2
Education-related	4	4	3	2	21	5
Shopping	7	7	16	12	29	39
Socalising/Meet Friends/Accompany a Friend	5	4	9	7	19	24
Sightseeing	4	6	10	7	10	11
Dining/Eating/Drinking	5	4	15	9	17	28
In Transit Only	3	5	5	6	21	18
Personal/Medical Business	2	2	1	1	11	2
Live in Central City	4	5	7	6	25	25
Spectator Sport	2	2	7	14	9	50
Gaming/Amusements	1	*	1	1	1	1
Cinema – Movies	1	*	2	2	2	7
Live Theatre, Ballet, Opera, etc.	2	3	3	13	13	46
Nightclub, Dancing	1	1	2	2	5	8
Visit Gallery/Museum	1	1	2	*	4	1
Other	1	1	1	3	4	9

See DTR Q.30a
* Less than 0.5%

The weekday pattern is quiet similar to 2004. The weekend pattern, however, shows some differences particularly with the increase in spectator sport and live theatre. The former is due to two weekend matches at Telstra Dome and the latter is at least in part due to the last weekend of the Comedy Festival.

The figures in the third column (CCA users excl. interstate and overseas visitors) may be compared with the Total in Table 6 earlier (from the CATI survey). There are some seemingly large differences (eg. CATI Weekday – Work Related Activities, 29k; Theatre/Cinema 26k; Dining/Food, 38k; Sightseeing, 10k; In-Transit, 21k. CATI Weekend – Shopping, 57k; Dining/Food, 49k, Sightseeing, 21k; Nightclub/Pub, 35k).

However, with the exception of Dining, which is appreciably and consistently lower in the Intercept Survey, the order and/or similarity between the results is encouraging.

15. Sightseeing

Southbank and Federation Square are the two main sightseeing areas, followed by the Bourke Street Mall and Docklands. Among specific venues, the Casino, the Aquarium, Queen Victoria Market and Parliament House are the main sites of interest.

Table 38

	%	
	Weekday **(159)** **(31k)**	**Weekend** **(91)** **(29k)**
Federation Square	35	48
State Theatre, Hamer Hall, Arts Centre/NGV (St. Kilda Road)	9	12
Docklands/New Quay	35	14
Parliament House	6	8
Immigration & Hellenic Museum	6	1
Casino	19	41
Queen Vic. Markets	11	8
Treasury Building/Gardens	3	1
Southbank/Southgate	44	65
Aquarium	12	14
St. Pauls	5	6
City Arcades	13	4
Telstra Dome	5	3
Princess Theatre	2	1
Bourke Street Mall	27	21
Rialto Observation Deck	8	3
Town Hall	5	5
State Library	4	4
Circle Tram	3	*
River Cruise	2	2
Melbourne Central	2	*
Chinatown	*	1
Gardens	2	*

See DTR Q.32

16. City Precincts (Main Activity)

Respondents were asked in which of nine CBD precincts plus Docklands and Southbank, their **main** activity was undertaken. The nine CBD precincts are:

> NW CBD
>
> SW CBD
>
> Queen Victoria Market
>
> RMIT and State Library
>
> Shopping retail
>
> NE CBD
>
> Chinatown – Cinemas – Theatres
>
> SE CBD
>
> Federation Square
>
> *(See Map following)*

Given the strength of going to work as being the **main** reason for being in the city on a weekday, it is not surprising that this tends to drive much precinct usage on weekdays, but less so on the weekend, so the relative importance of the precincts varies between weekdays and weekends.

Excluding "Sightseeing", and "In Transit" the breakdown of precinct usage for **main** activity is set out in Table 39.

CCA Precincts

Victoria St

CBD
↓

Franklin St

3

Q.V.
MARKETS

4

RMIT

LaTrobe St

NEW QUAY

FLAGSTAFF
GARDENS

STATE
LIB.

Harbour Espl

TELSTRA
DOME

Spencer St

King St

William St

Queen St

Elizabeth St

Swanston St

Russell St

Exhibition St

Spring St

1

6

Lonsdale St

ViC
HARBOUR

LAW
COURTS

NAB

MALL

PARLIAMENT

7

Bourke St

DOCKLANDS

Stn

5

11

2

TOWN
HALL

Collins St

RIALTO

8

TREAS. GDNS

Flinders St

YARRA'S EDGE

Stn

FEDN. SQ.

9

EXHIBIT'N
CENTRE

CROWN
CASINO

SOUTHBANK

THEATRES

St. Kilda Rd

10

NGV

CBD Precincts:

1. NW CBD
2. SW CBD
3. Markets
4. RMIT & State Lib.
5 Shopping/Retail

6. NE CBD
7. Chinatown-
Cinemas-Theatres
8. SE CBD
9. Fed. Square

Table 39: Precinct for Main Activity
(excluding Sightseeing and In Transit)

	%	
	Weekday (485k)	**Weekend (376k)**
Shopping Retail	29	40
SE CBD	16	3
Southbank	14	13
SW CBD	9	1
Docklands	6	20
NW CBD	6	2
RMIT and State Library	5	1
Chinatown and Cinemas	6	5
NE CBD	3	1
Queen Victoria Market	2	2
Federation Square	2	2

See DTR Q.2,3,11,12,18,19,31

The central shopping – retail precinct is the most prominent on both weekends and weekdays. Southbank is the third most prominent precinct on weekdays and weekends. On weekdays, the SE CBD (second) and SW CBD (forth) precinct are driven by worker numbers. The second most popular weekend precinct is Docklands (driven by Telstra Dome football).

The RMIT – State Library precinct is driven by student numbers on weekdays, hence the decline on weekends.

The Chinatown – Cinemas, Queen Victoria Market and Federation Square precincts are equally popular on weekends and weekdays.

17. City Precinct – Secondary Activities

Around three quarters of weekday (78%) and weekend (71%) CCA users undertook a secondary activity in the CCA in addition to their main activity. The most popular secondary activities on both weekend and week days are:

- dining/drinking
- fast food
- shopping

Residents, interstate visitors and international visitors are the most likely groups to undertake a secondary activity.

On weekdays, work or study are each undertaken by a quarter (24%) of CCA residents.

Table 40: Weekday – secondary activities

	%							
	Total (1,755) (543k)	Resident (106) (25k)	Worker (363) (210k)	Student (155) (40k)	Metro Visitor (630) (196k)	Regional Visitor (126) (15k)	Interstate Visitor (216) (26k)	Overseas Visitor (159) (31k)
Work	2	24	-	8	-	-	-	-
Study	2	24	1	-	-	-	-	-
Work related business	6	10	10	3	5	4	1	1
Study related activity	3	14	1	14	2	1	0	0
Sightseeing	3	2	1	3	3	7	10	11
Meet/accompanying friend	5	12	3	13	6	4	4	5
Medical/Personal	3	3	4	4	3	1	0	1
Shopping	19	24	16	25	15	33	32	31
Cinema	1	2	*	1	2	3	0	0
Live theatre etc	1	2	1	3	1	0	3	1
Gaming/amusements	1	0	0	0	2	2	5	4
Nightclub	*	2	0	0	1	1	1	0
Gallery/museum	1	1	1	1	1	0	2	4
Dining/drinking	33	37	26	23	34	50	55	53
Fast food	29	21	36	32	26	32	18	22
Sport Spectator	1	0	0	0	1	0	0	2
Gym	1	0	2	0	0	0	0	0
Nothing else	22	10	22	14	27	16	17	13

DTR Q.4, 6, 13, 20, 33a

It is worth pointing out at this point that the "doubling up" of residents who also work or study or workers who study or students who also work on an average weekday put the total number of workers and students in the CCA at 219k and 49k respectively as follows.

Table 41

	Main purpose	Resident who also works/ Studies	Worker who also studies	Student who also works	Total
Resident	25k				25k
Worker	210k	6k		3k	219k
Student	40k	6k	3k		49k

Table 42: Weekend - secondary activities

	%							
	Total (1,025) (389k)	Resident (76) (25k)	Worker (37) (42k)	Student (10) (2k)	Metro Visitor (574) (248k)	Regional Visitor (97) (15k)	Interstate Visitor (145) (26k)	Overseas Visitor (86) (31k)
Shopping	18	36	33	30	10	19	36	28
Cinema	2	4	0	0	2	3	3	2
Live theatre etc	3	3	2	0	2	2	4	4
Gaming/amusements	3	2	0	0	3	9	9	7
Gallery/museum	1	0	0	0	1	0	0	5
Dining/drinking	41	40	29	30	37	40	66	60
Fast food	21	16	35	40	19	27	15	19
Spectator sport	1	2	0	0	*	1	4	0
Sightseeing	3	2	0	0	2	5	7	12
Met/accompanying friend	5	14	2	10	5	4	7	2
Work related	1	2	0	0	1	1	1	0
Study related	1	6	0	20	0	0	0	0
Personal business	*	4	0	0	0	0	0	1
Night club	*	0	0	0	0	1	1	0
Gym	*	5	0	0	0	0	0	0
Nothing else	29	3	33	30	36	29	10	9

DTR Q.33a

Considering both main and secondary activities together, on average, each city user undertakes two activities on both weekdays and weekends.

The four most widespread weekday activities are:

Work   (40% - almost exclusively a main activity)

Dining   (32% - mainly a secondary activity)

Fast Food   (30% - almost exclusively a secondary activity)

Shopping   (26% - mainly a secondary activity)

The four most widespread weekend activities are:

Dining   (40% - mainly a secondary activity)

Shopping   (30% - mainly a secondary activity)

Fast Food   (21% - almost exclusively a secondary activity)

Live Theatre   (16% - mainly a main activity)

Other than the work and live theatre differences above, other significant weekday – weekend differences are:

Study and study related activities (weekday based)

Spectator sport (weekend based)

Business related activities (weekday based)

Medical – personal business (weekday based)

Cinema and gaming (weekend based)

Table 43: All Activities

	Weekday				Weekend			
	No. k			%	No. k			%
	Main	Secondary	Total	(543)	Main	Secondary	Total	(389)
Resident	25	0	25	5	25	0	25	6
Work	210	9	219	40	42	0	42	11
Student	40	9	49	9	2	0	2	1
In-transit/walking	27	1	28	5	22	0	22	6
Sightseeing	31	17	48	9	29	12	41	11
Work related business	47	35	82	15	15	3	18	5
Study related business	22	15	37	7	6	3	9	2
Met/accompanying friend/social	23	29	52	10	27	21	48	12
Medical/personal	12	15	27	5	3	2	5	1
Clothes shopping	27	54	81	15	28	36	64	16
Other shopping	11	48	59	11	20	34	54	14
Cinema	2	6	8	1	8	9	17	4
Live theatre	14	5	19	3	52	9	61	16
Gaming/amusements	2	6	8	1	3	13	16	4
Nightclub	5	3	8	1	8	1	9	2
Gallery/museum	5	5	10	2	1	3	4	1
Dining	17	158	175	32	29	126	155	40
Drinking	4	19	32	4	2	32	34	9
Fast food	2	160	162	30	3	81	84	21
Sport spectator	10	3	13	2	55	3	58	15
Sport participant	2	1	3	1	1	0	1	*
Window shopping	1	2	3	1	1	1	2	1
Gym	1	5	6	1	2	1	3	1
Non-business seminar/ conference	*	3	3	1	1	0	1	*
Church	0	0	0	0	3	1	4	1

DTR Q.30a,33

18. Daytime vs. Night time Activities

Excluding residents, workers, students, in-transits and sightseers, 71% of the CCA weekday main activity occurs in the daytime (6am – 6pm), but a lower 63% on the weekend. This pattern is relatively similar among Melbourne metro visitors, regional Victorian visitors, interstate visitors or overseas visitors.

Table 44

	%	
	Weekday **(210k)**	**Weekend** **(269k)**
Day	71	63
Night	29	38

DTR Q.30b

Work related, study related and shopping activities are almost entirely daytime.

Meeting or accompanying friends are mainly daytime.

Gaming is evenly split between day and night.

Cinema, theatre and dining are mainly night time.

Spectator sport is night time on weekdays (Friday night AFL) and daytime on weekends (afternoon AFL).

Nightclubbing is night time.

Table 45

	% Activity which is Daytime (6am – 6pm)	
	Weekday	**Weekend**
Work related	93	69
Study related	92	96
Accompanying a friend/social	70	59
Shopping	95	98
Cinema	22	38
Theatre etc	14	17
Gaming	55	52
Nightclub	8	0
Dining/food/drink	35	35
Spectator sport	5	99

DTR Q.30b

19. Expenditure

Two in ten (22%) weekday users and one in ten (12%) weekend users do not spend anything when in the central city area (principally workers and students). The expenditure pattern is higher on weekends than weekdays.

Table 46

	%	
	Weekday (524k)	**Weekend (374k)**
$0	22	12
$1 - $10	25	15
$11 - $25	19	16
$26 - $100	23	41
Over $100	11	15

DTR Q.38

The mean weekday spend is $50.9. (The Median is $15.) If we exclude high spend outliers from this (> $500), this mean reduces to $41.4 which equates to $22.5m per weekday.

The mean weekend spend is $77.7. (The Median is $50.) If we exclude high spend outliers from this (> $500), this mean reduces to $63.1 which equates to $24.5m per weekend day.

Interstate and International visitors are the big spenders. Students and workers are the least.

Table 47

	$ Mean Spend per Weekday
Residents	44.3
Workers	26.1
Students	23.0
Melbourne Metro Visitors	53.9
Regional Victorian Visitors	87.5
Interstate Visitors	145.2
International Visitors	145.0

DTR Q.38

20. Change in Mode of Travel to CCA

7% of Victorian CCA users indicated they have changed their mode of travel to the CCA in the last year. Change from car to non car slightly exceeds that from public to non-public.

On weekdays, parking fees are slightly more prominent than fuel prices as causes of the car – non car change; on weekends, fuel prices are more prominent.

Table 48: Mode of Travel

	%	
	Weekday **(1,255)** **(457k)**	**Weekend** **(691)** **(298k)**
Change mode of travel in the last year	7	7
Change from Car to Non-car	2	2
Change from Public to Non-public	1	2
Why changed from Car	**(26)** **(11k)**	**(17)** **(7k)**
Change in personal circumstances	27	26
Fuel prices increased	45 (5,000 users)	43 (3,000 users)
Parking fees increased	55 (6000 users)	14 (1000 users)
Traffic congestion	9	*
Parking difficulties	*	9

See DTR Q.43-46

21. Frequency of Travel to CCA

More Victorian CCA users indicate they are travelling to the CCA more often on a weekday than are travelling% less often. The majority are travelling to the same extent (as a year ago).

The vast majority of reasons for change have to do with changes in users' own work, educational or personal circumstances, or changes in or adaptation to local area shopping etc.

On the positive side, around one in six of those travelling more often referred to the attraction of CoM events/activities/shopping.

On the negative side, under one in ten of those who are travelling less often mentioned each of:

- Parking difficulties
- Parking cost
- Public transport cost
- Fuel cost
- Traffic congestion
- Less attraction in city activities/events

Table 49: Frequency of City Travel

	%	
	Weekday **(1,255)** **(457k)**	**Weekend** **(691)** **(298k)**
Travelling less often	5	10
Travelling more often	17	24
Travelling the same	74	60
Can't say	5	7
Why less often?	(71) (21k)	(74) (30k)
Change in work/education	40	54
Change in personal circumstances	24	27
Local centre appeals	11	7
Parking difficulty	6	10
Traffic congestion	3	8
City events less attractive	3	2
Cost of public transport	8	3
Fuel prices have increased	5 (1,000 users)	3 (1,000 users)
Parking fees have increased	5 (1,000 users)	3 (1,000 users)
Why more often?	(221) (76k)	(138) (70k)
Change in work/education	71	54
Change in personal circumstances	30	29
City events/activity/shopping more attractive	16	15
Local centre less attractive	1	1

See DTR Q. 47-49

Appendix A:

Questionnaire
(CATI Survey)

CATI Questionnaire

Good ……., my name is …… from Nexus Research, the market research company. We're doing a short survey among Victorians on behalf of the Melbourne City Council concerning people's recent visits to the city of Melbourne itself. It only takes a couple of minutes.

IF NO: THANK POLITELY

Are you aged 15 years or over?

Yes	1	**CONTINUE**
No	2	**ASK TO SPEAK TO 15+ Y.O. REPEAT INTRO**

NB:	**IN THE FOLLOWING QUESTIONS, "Go to", "Were in" ETC. MEANS PHYSICALLY IN, ON FOOT, NOT SIMPLY DROVE THROUGH OR PASSED THROUGH ON PUBLIC TRANSPORT**
ALSO	**Casino = Southbank Fed Sq = CBD** **Telstra Dome = Docklands** **NGV, State Theatre, Hamer Hall = Southbank** **MCG = East Melb/Jolimont** **Tennis Centre = East Melb/Jolimont**

q.1   OK. Thinking about the CBD of Melbourne – the area bounded by Spring & Spencer Streets and Victoria Parade and Flinders Streets – did you go to the CBD area for any purpose <u>yesterday, including last night</u>? **[NAME DAY]**

Yes	1	**CONTINUE**
No	2	**GO TO q.3**

q.2 a   What was the <u>main</u> reason you were in the CBD yesterday? **[READ]**

q.2 b   Other than **[ANSWER IN q.2a]** what else did you do or buy in the CBD yesterday?

	q.2a Main	q.2b Other
It's your regular place of work...	01	01
It's not your regular place of work, but for a work-related purpose .	02	02
School/uni/college, etc..	03	03
Shopping	04	04
Go to theatre, cinema, concert, etc.	05	05
Dining, go to a restaurant, etc.	06	06
Buy takeaway/fast food/coffee.......................................	07	07
Or Some other reason **[SPECIFY]**.................................	20	20
Nothing Else		99

q.3   What about Docklands or the Southbank areas? Did you go to either or both of these areas <u>yesterday, including last night</u>? **[NAME DAY]**

Yes, Docklands	1	**ASK q.4a, q.4b**
Yes, Southbank	2	**ASK q.5a, q.5b**
No	3	**GO TO q.7a**

q.4 a   What was the main reason you were in Docklands yesterday? **[READ]**

q.4 b   Other than **[ANSWER IN q.4a]** what else did you do or buy in Docklands yesterday?

	q.4a Main	q.4b Other
It's your regular place of work..	01	01
It's not your regular place of work, but for a work-related purpose .	02	02
School/uni/college, etc...	03	03
Shopping	04	04
Go to theatre, cinema, concert, etc.	05	05
Dining, go to a restaurant, etc.	06	06
Buy takeaway/fast food/coffee...	07	07
Telstra Dome, football, sport, etc.	08	08
Or Some other reason **[SPECIFY]**..	20	20
Nothing Else		99

q.5 a   **[ASK ONLY IF CODE 2 IN q.3, OTHERWISE GO TO q.6]**
What was the main reason you were in the Southbank area yesterday? **[READ]**

q.5 b   Other than **[ANSWER IN q.5a]** what else did you do or buy in the Southbank area yesterday?

	q.5a Main	q.5b Other
It's your regular place of work..	01	01
It's not your regular place of work, but for a work-related purpose .	02	02
School/uni/college, etc...	03	03
Shopping	04	04
Go to theatre, cinema, concert, etc.	05	05
Dining, go to a restaurant, etc.	06	06
Buy takeaway/fast food/coffee...	07	07
Casino.	09	09
Or Some other reason **[SPECIFY]**..	20	20
Nothing Else		99

q.6 **[IF CODE 1 IN q.1 AND EITHER OR BOTH OF CODES 1 AND 2 IN q.3 CONTINUE;**
IF NOT CODE 1 IN q.1, BUT BOTH OF CODES 1 AND 2 IN q.3, CONTINUE;
OTHERWISE GO TO q.8]
Which of the Melbourne CBD, Docklands and/or Southbank was the main or principal area of the city you went to yesterday?

CBD	1
Docklands	2
Southbank	3
All	4
Can't Say	5

q.7 a Which of the following Melbourne suburbs or areas, if any, did you go to <u>yesterday or last night</u>?
[NAME DAY. READ]

West Melbourne	01	
North Melbourne	02	
East Melbourne or Jolimont	03	
Lygon St	04	**GO TO**
Elsewhere in Carlton	05	**q.8**
Parkville, including Melbourne Uni	06	
Kensington	07	
or St. Kilda Road		
(between the Junction & the National Gallery)	08	
None	09	
Not Sure	10	**CONTINUE**

q.7 b **[IF CODE 10, NOT SURE, IN q.7a, CONTINUE,**
OTHERWISE GO TO q.8]
Where specifically did you go? We can work out if it's in a relevant area or not.
[GET SPECIFIC ADDRESS, OR STREET, PLACE/BUSINESS NAME, ETC.]

_____

_____

_____

q.8 On average, over the course of a year, how often would you go to the combined CBD-Docklands-Southbank area? **[DO NOT READ]**

Every day, or almost every day	01
5 days a week	02
2 to 4 days a week	03
Once a week	04
Every 2-3 weeks *(15-20 times a year)*	05
Once a month *(10-14 times a year)*	06
5-9 times a year	07
2-4 times a year	08
Once a year	09
Less often	10
(Can't say	11)

q.9 a In general, do you currently travel to the city more or less often than, or about the same as, last year?

Can't Compare (new in Vic.)	1	**GO TO**
The Same	2	**q.10a**
More Often	3	**CONTINUE**
Less Often	4	

q.9 b   Why are you currently travelling to the city more/less often than last year? **[DO NOT AID]**

Started work/change in work/stopped work	1
Stopped/started college or uni/change in college or uni	2
Moved home/residence	3
Cost of travel/expense	4
← Other **[SPECIFY]**	

q.9 c   **[IF CODE 4 IN q.9b CONTINUE, OTHERWISE GO TO q.10]** How has the cost of travel changed? **[DO NOT AID]**

Public transport fares increased	1
Fuel prices have increased	2
Parking fees have increased	3
Congestion levy	4
Get concession/cheaper fare on public transport	5
Work pays for/subsidises car	6
← Other **[SPECIFY]**	7

q.10 a   How do you normally travel to the city when you go? **[READ]**

Car, as driver	01	Bus	07
Car, as passenger	02	Taxi	08
Train – do not park at station	03	Motorcycle	09
Train – park at station	04	Bicycle	10
Tram – do not park near tram stop	05	Riverboat	11
Tram – park near tram stop	06	On foot	12
		Other **[SPECIFY]**	13

q.10b   Have you changed the way you normally travel to the city within the last year?
[**DO NOT AID**]

Yes	1	**CONTINUE**
No	2	**GO TO**
Can't Say (new to Vic)	3	**q.11**

q.10c   What have you changed to? **[COL 1]** What have you changed from? **[COL 2]**

	Changed To	Changed From
Car, as driver	01	01
Car, as passenger	02	02
Train – do not park at station	03	03
Train – park at station	04	04
Tram – do not park near tram stop	05	05
Tram – park near tram stop	06	06
Bus	07	07
Taxi	08	08
Motorcycle	09	09
Bicycle	10	10
Riverboat	11	11
On foot	12	12
Other **[SPECIFY]**	13	13

q.10d   Why have you changed? **[DO NOT AID]**

Change in workplace/hours	1
Change in college/uni location/hours	2
Moved home/residence	3
Need/Didn't need car for work	4
Cost of travel/expense	5
← Other **[SPECIFY]**	6

q.10e   **[IF CODE 5 IN q.10d CONTINUE, OTHERWISE GO TO q.11]**
         How has the cost of travel changed?

Public transport fares increased	1
Fuel prices have increased	2
Parking fees have increased	3
Congestion levy	4
Get concession/cheaper fare on public transport	5
Work pays for/subsidises car	6
← Other **[SPECIFY]**	7

q.11   That's it. Just a couple of questions to make sure we've got a good cross-section of people.

Which of the following age group are you in? **[READ]**

Your Teens	1	60's	6
20's	2	70's	7
30's	3	80's or over	8
40's	4	**DNR** (Refused	9)
50's	5		

q.12   Are you … **[READ]**

A student	1
In the labour force	2
Undertake home duties	3
Retired	4
Or Unemployed	5

q.13   **RECORD GENDER**

Male	1
Female	2

Just in case my supervisor needs to verify my work, could I please confirm your name and phone number.

Ph: (_____)_____ and your name is? _____

Thank you for your time. Just to remind you, my name is …….. from Nexus Research. If you have any questions about this research you can telephone our office on (03) 9428 1356.

Day:
_____
Date:
---/ ---/ 06
Time:
_____

INTERVIEWER DECLARATION: I certify that this is a true, accurate and complete interview, conducted in accordance with the IQCA standards and the AMSRS Code of Professional Behaviour (ICC/ESOMAR). I will not disclose to any other person the content of this questionnaire or any other information relating to this project.

Int. Name: …………………………………..……. Int. Sig: ………… ………………………………….……..

ID ___ ___ ___ ___ Date: /   /

Appendix B:

Questionnaire
(Intercept Survey)

City Questionnaire

Good ……., my name is …… from Nexus Research, the market research company and we are doing a survey on behalf of Melbourne City Council to find out what brings people to Melbourne and why they're here. Can I have just a few minutes of your time to ask you some questions please.

IF NO:　　THANK POLITELY
IF YES:　　Great. Much appreciated. First, can I ask you …

q.1　　Which of the following best describes your reason for being here in the city today? **[READ]**

Live here in the CBD, Docklands or Southbank	1	**CONTINUE**
Working here in the city at my normal, regular place of work	2	**P.2 GREEN TOP**
On work-related business, but my normal regular place of work is not here in central Melbourne	3	**P.2 GREEN BOTTOM**
Studying (school, uni, college, etc.) here in the city........................	4	**P.3 PINK TOP**
Live in the Melbourne suburbs, visiting the city for shopping, leisure or some other reason...	5	**P.3 PINK BOTTOM**
Live in country Victoria, visiting the city for shopping, leisure or some other reason	6	**P.3 PINK BOTTOM**
Visiting from interstate..	7	**P.4 YELLOW**
Visiting from overseas	8	**P.4 YELLOW**

STOP AT YES. SINGLE RESPONSE ONLY

q.2　　**[IF CODE 1 IN 0]** Where do you live exactly, in … **[READ]**

The CBD	1	→	q.3 Where in the CBD?	[ ]	**SHOW MAP**
Docklands	2				
Southbank	3				

q.4　　Have you or will you also work in … **[READ]** today?

The CBD	1	→	q.5 Where in the CBD?	[ ]	**SHOW MAP**
Docklands or	2				
Southbank	3				
No	4	**GO TO q.6**			

q.6　　Have you or will you also attend school, uni or a college in … **[READ]** today?

The CBD	1	→	q.7 Where in the CBD?	[ ]	**SHOW MAP**
Docklands or	2				
Southbank	3				
No	4	**NOW GO TO q.33 WHITE**			

q.8　　Are you an international/overseas student, or an Australian student?

Int'l/OS	1	**CONTINUE**
Australian	2	**NOW GO TO q.33 WHITE**

q.9　　From which country do you come?

_____

CITY WORKER (if code 2 in 0)

q.10   Where do you live?   (Suburb or Town Name/Postcode)

_____

q.11   Where is your normal regular place of work, in … **[READ]**

The CBD	1	→	q.12	Where in the CBD?	☐	**SHOW MAP**
Docklands or	2					
Southbank	3					

q.13   Have you or will you also attend school, uni or a college in … **[READ]** today?

The CBD	1	→	q.14	Where in the CBD?	☐	**SHOW MAP**
Docklands or	2					
Southbank	3					
No	4	**GO TO q.33**				

NOW GO TO q.33 WHITE

- -

ON WORK BUSINESS (if code 3 in 0)

q.15   Where is your normal or regular place of work?

FOR VIC:	Suburb/Town:	_____	Postcode: _____
FOR I'STATE:	State:	_____	
FOR INT'L:	Country:	_____	

q.16   Where do you live?

FOR VIC:	Suburb/Town:	_____	Postcode: _____
FOR I'STATE:	State:	_____	
FOR INT'L:	Country:	_____	

NOW GO TO q30b PURPLE

STUDENT (if code 4 in 0)

q.17   Where do you live?   Suburb/Town: _____   Postcode: _____

q.18   Where is your school/college/uni?

The CBD	1	→	q.19	Where in the CBD? ☐	**SHOW MAP**
Docklands or	2				
Southbank	3				

q.20   Have you or will you also work in … **[READ]** today?

The CBD	1	→	q.21	Where in the CBD? ☐	**SHOW MAP**
Docklands or	2				
Southbank	3				
No	4				

q.22   Are you an international/overseas student, or an Australian student?   Int'l/OS 1 **CONTINUE**
                                                                    Australian 2 **GO TO q.33**
                                                                   WHITE

                                                                               NOW GO TO q.33

q.23   From which country do you come?   _____ **WHITE**

VICTORIAN VISITOR (if code 5 or 6 in 0)

q.24   Where do you live?

                                                                                      NOW GO TO q.30

            Suburb/Town: _____   Postcode: _____ **PURPLE**

I'STATE/OVERSEAS VISITOR (if code 7 or 8 in 0)

q.25   Where do you live? What is your home state/country?

WA	01
SA	02
Tas	03
NSW	04
Qld	05
ACT	06
NT	07

Country: **SPECIFY**

_____

q.26   How many days, in total, are you in Victoria for?

q.27   For how many of these days are you staying … **[READ]**
                           in the city area itself   **SHOW MAP**
                           elsewhere in the Melbourne suburban area   **ASK q.28**
                           in regional and country Victoria   **ASK q.29**

q.28   For the [X] days you are staying in the Melbourne suburban area, on how many have you or will you come here into the city?

q.29   For the [X] days you are staying in regional and country Victoria, on how many have you or will you also come here to the city?

NOW CONTINUE WITH q.30, PURPLE

---

q.30 a Thinking only about this city visit, what is the main purpose of this visit to the city?
[ONE PURPOSE ONLY. RECORD BELOW]

In transit only – passing through the city only to somewhere else....	01	**GO TO q.33**
Sightseeing...	02	**GO TO q.32**
Work-related business/conference/seminar......................................	03	|
Not work-related conference/seminar	04	|
Study-related activity (eg. library)	05	|
To accompany a friend...	06	|
For a social visit/to meet friends...	07	|
Medical or dental treatment...	08	|
Other personal business (eg. banking, solicitor)	09	|
Shopping for clothes, footwear..	10	|
Shopping for food &/or groceries...	11	|
Shopping for something else...	12	**CONTINUE**
Cinema/movies...	13	|
Major event/festival, etc..	14	|
Live theatre/ballet/opera/musical/ comedy, etc.	15	|
Gaming/Amusements (incl. Casino)...	16	|
Nightclub, dancing, etc.	17	|
Visit gallery/museum	18	|
Dine at restaurant or café..	19	|
Buying food or drink from fast food outlet (eat-in or takeaway)........	20	|
Drinking only (eg. at a bar)	21	|
Sport – participant	22	|
Sport – spectator	23	|
Gym, health club, baths...	24	|
Other **[SPECIFY]**..	98	|
		|
		|

q.30b Did that main activity occur between 6am and 6pm – the day – or between 6pm and 6am – the night?

6am – 6pm, Day	1
6pm – 6am, Night	2

q.31 Whereabouts in the city have you or will you undertake that main activity of this visit? **SHOW MAP**

CBD Precinct 1	01	
" ' 2	02	
" ' 3	03	
" ' 4	04	
" ' 5	05	
" ' 6	06	
" ' 7	07	
" ' 8	08	
" ' 9	09	**NOW GO**
Southbank	10	**TO q.33,**
Docklands	11	**WHITE**

q.32   What city sights have you visited or do you intend to visit today? (Any others? Any others?)

Aquarium	01	Q.V. Markets	12
Bourke Street Mall....................................	02	Rialto Observation Deck	13
Casino	03	Southbank/Southgate.................................	14
City Arcades	04	St. Paul's Cathedral	15
Docklands (gen.)......................................	05	State Library...	16
Federation Square (ACMI, Potter Gallery) ..	06	Telstra Dome	17
Immigration & Ethnic Museum	07	Town Hall	18
New Quay–Waterfront City (Docklands)	08	Treasury Building/Treasury Gardens	19
NGV, Hamer Hall, State Theatre................	09	Other **[SPECIFY]**	99
Parliament House......................................	10		
Princess Theatre	11		

NOW CONTINUE WITH q.33, WHITE

_____

ALL

q.33 a   Other than the main purpose you are in the city this visit (including passing through, live here, work or education) what else have you or will you do whilst here? **[RECORD BELOW]**

q.33b   Which of those activities, if any, have occurred or will occur between 6pm and 6am – the night? **[RECORD NIGHT ACTIVITY ONLY]**

q.34   Whereabouts in the city have you or will you [**NAME ACTIVITY**]   **SHOW MAP**
         [**ASK FOR EACH ACTIVITY MENTIONED IN q.33**]

	q.33a Activity	q.33b Night Activity	q.34 Precinct No.
Sightseeing	02	02	
Work-related business/conference/seminar	03	03	
Not work-related conference/seminar	04	04	
Study-related activity (eg. library)	05	05	
To accompany a friend	06	06	
For a social visit/to meet friends	07	07	
Medical or dental treatment	08	08	
Other personal business (eg. banking, solicitor)	09	09	
Shopping for clothes, footwear	10	10	
Shopping for food &/or groceries	11	11	
Shopping for something else	12	12	
Cinema/movies	13	13	
Major event/festival, etc.	14	14	
Live theatre/ballet/opera/musical/ comedy, etc.	15	15	
Gaming/Amusements (incl. Casino)	16	16	
Nightclub, dancing, etc.	17	17	
Visit gallery/museum	18	18	
Dine at restaurant or café	19	19	
Buying food or drink from fast food outlet (eat-in or takeaway)	20	20	
Drinking only (eg. at a bar)	21	21	
Sport – participant	22	22	
Sport – spectator	23	23	
Gym, health club, baths	24	24	
Other **[SPECIFY]**	98	98	
None of the above	99	99	

q.35   What forms of transport have you or will you use to get around whilst in the city itself this visit?

Car, as driver   01
Car, as passenger   02
Tram   03
Train   04
Bus   05
Taxi   06
Motorcycle   07
Bicycle 08
Riverboat   09
On foot 10

_____ ← Other   [SPECIFY]
11

q.36   Did you come here to the city this visit **[READ]** …

By yourself	1	**GO TO**
With your spouse or partner	2	**q.38**
With a tour group	3	
As a family group	4	
With friends and/or relatives	5	**CONTINUE**
With business associates/workmates	6	

q.37   How many people did you come with?

q.38   Excluding car parking costs or public transport costs, how much,
in total, do you estimate you will have spent in the city on this visit? $ _____

q.39   OK. Still thinking only about this particular visit or journey to this city area, where did you
actually come to the city from?
[READ. NB: PLACE/TASK IMMEDIATELY BEFORE THE CITY]

Residence or Accommodation in the CBD, Southbank or Docklands...	1	**CONTINUE**
Residence or Accommodation in West Melb, North Melb, Kensington, Carlton, Parkville, South Yarra, East Melb, Jolimont or St. Kilda Rd.....	2	
Accommodation or Home, but not in those suburbs	3	
Work or Education Facility in West Melb, North Melb, Kensington, Carlton, Parkville, South Yarra, East Melb, Jolimont or St. Kilda Rd....	4	**GO TO** **q.41**
Work, but not in those suburbs..	5	
School/Uni/College, but not in those suburbs......................................	6	
Ship/Airport	7	
↓ Elsewhere **[SPECIFY IN DETAIL, INCL. POSTCODE]**........................	8	

q.40   Where in the city itself is the residence or
accommodation you started at?   **[PRECINCT]**   **SHOW MAP**
NOW GO TO
q.50

q.41   How did you get here into the city this visit or journey?
[READ. NB: LAST MODE BEFORE CITY ITSELF]

Car, as driver	01	Bus	07
Car, as passenger	02	Taxi	08
Train – did not park at station	03	Motorcycle	09
Train – parked at station	04	Bicycle	10
Tram – did not park near tram stop	05	Riverboat	11
Tram – parked near tram stop	06	On foot	12
		← Other **[SPECIFY]**	13

q.42   **[ASK ONLY IF CODE 2, 3, 4, 5 OR 6 IN 0, OTHERWISE GO TO q.50]**
Thinking now not just about this particular city visit, but when you generally visit the city, how do
you normally travel to the city when you come in? **[READ]**

Car, as driver	01	Bus	07
Car, as passenger	02	Taxi	08
Train – do not park at station	03	Motorcycle	09
Train – park at station	04	Bicycle	10
Tram – do not park near tram stop	05	Riverboat	11
Tram – park near tram stop	06	On foot	12
		Other **[SPECIFY]**	13

q.43   Have you changed the way you normally travel to the city within the last year?
        [**DO NOT AID**]

Yes	1	**CONTINUE**
No	2	**GO TO**
Can't Say (new to Vic)	3	**q.9**

q.44   What have you changed to? **[COL 1]** What have you changed from? **[COL 2]**

	Changed To	Changed From
Car, as driver	01	01
Car, as passenger	02	02
Train – do not park at station	03	03
Train – park at station	04	04
Tram – do not park near tram stop	05	05
Tram – park near tram stop	06	06
Bus	07	07
Taxi	08	08
Motorcycle	09	09
Bicycle	10	10
Riverboat	11	11
On foot	12	12
Other **[SPECIFY]**	13	13

q.45   Why have you changed? **[DO NOT AID]**

Change in workplace/hours	1
Change in college/uni location/hours	2
Moved home/residence	3
Need/Didn't need car for work	4
Cost of travel/expense	5
← Other **[SPECIFY]**	6

q.46   **[IF CODE 5 IN q.45 CONTINUE, OTHERWISE GO TO q.9]**
        How has the cost of travel changed?

Public transport fares increased	1
Fuel prices have increased	2
Parking fees have increased	3
Congestion levy	4
Get concession/cheaper fare on public transport	5
Work pays for/subsidises car	6
← Other **[SPECIFY]**	7

q.47   In general, do you currently travel to the city more or less often than, or about the same as, last year?

Can't Compare (new in Vic.)	1	**GO TO**
The Same	2	**q.50**
More Often	3	**CONTINUE**
Less Often	4	

q.48   Why are you currently travelling to the city more/less often than last year? **[DO NOT AID]**

Started work/change in work/stopped work	1
Stopped/started college or uni/change in college or uni	2
Moved home/residence	3
Cost of travel/expense	4
← Other **[SPECIFY]**	

q.49   **[IF CODE 4 IN q.48 CONTINUE, OTHERWISE GO TO q.50]**
How has the cost of travel changed? **[DO NOT AID]**

Public transport fares increased	1
Fuel prices have increased	2
Parking fees have increased	3
Congestion levy	4
Get concession/cheaper fare on public transport	5
Work pays for/subsidises car	6
← Other **[SPECIFY]**	7

q.50   And now finally, just a couple of questions about yourself to ensure we've got a good cross-section of people.

Which age group are you in?

Teens	1	60's	6
20's	2	70's	7
30's	3	80's or over	8
40's	4	(Refused	9)
50's	5		

q.51   In which country were you born?

Australia	1
Other **[SPECIFY]**	2

q.52   What is the main language spoken at home?

English	1
Other **[SPECIFY]**	2

q.53   Are you a … **[READ]**

	M/R
Full Time Worker	1
Part Time or Casual Worker	2
Full Time Student	3
Part Time Student	4
Retired	5
Unemployed	6
Home Duties Person	7
[DNRO] Refused	8

q.54   **RECORD GENDER**

Male	1
Female	2

Just in case my supervisor needs to verify my work, could I please confirm your name and phone number.

Ph: (_____)_____ and your name is? _____

Thank you for your time. Just to remind you, my name is …….. from Nexus Research. If you have any questions about this research you can telephone our office on (03) 9428 1356.

Day:
_____
Date:
---/ ---/ 06
Time:
_____
Location
_____

INTERVIEWER DECLARATION: I certify that this is a true, accurate and complete interview, conducted in accordance with the IQCA standards and the AMSRS Code of Professional Behaviour (ICC/ESOMAR). I will not disclose to any other person the content of this questionnaire or any other information relating to this project.

Int. Name: …………………………………..…… Int. Sig: ………… …………………………………..…..

ID ___ ___ ___ ___ Date: /   /

Appendix C:

NVS-IVS 2004-2005 Final Estimates

NVS 04-05

	B	C	D	E	F	G	H	I	J	K	L
2	All destination purpose of visit by Home state / region by Latest year ending December and All destination SLA										
3	INTERSTATE and REGIONAL VICTORIAN VISITORS										
4			Year ending December 2004					Year ending December 2005			
5	Purpose of visit	Origin of visitors	CCA	Metro Melbourne (exc. CCA)	Regional Vic (exc. Metro Melb)	Total		CCA	Metro Melbourne (exc. CCA)	Regional Vic (exc. Metro Melb)	Total
6					VISITOR NIGHTS ('000)						
7	Education (mostly students)										
8		Metro Melbourne	-	16	250	267		6	3	147	156
9		Regional Victoria	38	13	124	174		31	79	153	264
10		Interstate	84	15	23	121		96	41	44	181
11	Employment										
12		Metro Melbourne	10	122	1,106	1,237		-	102	1,364	1,466
13		Regional Victoria	450	116	518	1,085		455	216	493	1,163
14		Interstate	2,804	639	615	4,058		2,555	423	598	3,576
15	Other										
16		Metro Melbourne	119	3,346	15,494	18,959		232	2,889	14,740	17,861
17		Regional Victoria	1,885	2,010	7,117	11,012		2,050	1,469	6,247	9,766
18		Interstate	5,672	5,277	7,011	17,959		6,300	4,917	5,470	16,687
19	Total										
20		Metro Melbourne	129	3,484	16,850	20,463		238	2,994	16,250	19,482
21		Regional Victoria	2,374	2,138	7,759	12,271		2,536	1,764	6,893	11,192
22		Interstate	8,560	5,930	7,648	22,139		8,951	5,381	6,113	20,445
23					OVERNIGHT VISITORS ('000)						
24	Education (mostly students)										
25		Metro Melbourne	-	8	67	76		2	1	55	58
26		Regional Victoria	16	9	44	69		14	10	49	72
27		Interstate	25	2	7	35		19	9	8	35
28	Employment										
29		Metro Melbourne	5	63	509	577		-	41	568	609
30		Regional Victoria	193	62	304	542		236	97	241	572
31		Interstate	1,183	203	231	1,576		1,120	172	184	1,428
32	Other										
33		Metro Melbourne	80	1,287	5,745	7,088		140	1,140	5,184	6,450
34		Regional Victoria	987	899	2,477	4,250		1,076	705	2,302	4,013
35		Interstate	1,551	995	1,546	3,644		1,746	825	1,251	3,471
36	Total										
37		Metro Melbourne	85	1,358	6,317	7,736		142	1,181	5,800	7,110
38		Regional Victoria	1,196	970	2,825	4,856		1,325	803	2,588	4,645
39		Interstate	2,758	1,196	1,777	5,209		2,886	1,004	1,438	4,907
40			2004					2005			
41	Interstate Visitors ('000)			Total					Total		
42	Visitor days to CCA for non edu&emp (D18+D35)		7,223					8,046			
43	Visitor days from Melb Subs to CCA (E22*E50)		1,483					1,345			
44	Visitor days from Reg. Vic to CCA (F22*E51)		153					138			
45	Total visitor days per annum (D42+D43+D44+D62)		8,931					9,681			
46	Average daily visitors (D45/365)		24					26			
47											
48			2004					2005			
49			Adj Factor								
50	(1) Metro to CCA rate (City Survey) = 1/2		50%	25%					25%		
51	(2) Reg to CCA rate (city Survey) = .18/.8		10%	2%					2%		
52			Day trips (000) to CCA Main purpose of trip by Home state / region by Calendar year								
53	Purpose	Origin of visitors	NVS 2004					NVS 2005			
54	Employment*										
55		Regional Victoria	346					378			
56		Interstate	139					178			
57	Education (mostly students)										
58		Regional Victoria	51					24			
59		Interstate	-					2			
60	Other										
61		Regional Victoria	2,054					2,439			
62		Interstate	72					152			
63	Total										
64		Regional Victoria	2,451					2,841			
65		Interstate	211					332			
66	Regional Victoria Visitors ('000)										
67	Visitor days by overnight visitors ('000) (D17+D34)		2,872					3,126			
68	Total visitor days per annum (D67+D61)		4,926					5,565			
69	Average daily visitors (D68/365)		13.50					15.25			

* Employment includes: work/business, providing transport (driver, crew, …), training/research (employed but non-students) and empl/leisure

IVS 04-05

A	B	C	D	E	F	G	H	I	J
2		**INTERNATIONAL VISITORS**							
3		Stopover Reason for Visits		IVS 2004			IVS 2005		
4				Visitors	Visitor Nights	Av Nights	Visitors	Visitor Nights	Av Nights
5		**Central City Area (CBD, Docklands and Southbank)**							
6		Employment		6,321	380,963	60.27	10,305	626,751	60.82
7		Education		37,725	3,874,109	102.69	36,469	3,810,988	104.50
8		Other		936,867	7,177,438	7.66	916,106	7,540,464	8.23
9		Total		977,026	11,432,510	11.70	959,813	11,978,202	12.48
10		**Metro Melbourne (including Central City Area)**							
11		Employment		16,689	2,157,489	129.28	20,980	1,735,487	82.72
12		Education		77,877	10,826,960	139.03	71,702	9,074,137	126.55
13		Other		1,174,052	12,610,403	10.74	1,204,597	13,648,720	11.33
14		Total		1,260,203	25,594,852	20.31	1,285,225	24,458,344	19.03
15		**Metro Melbourne (exc. Central City Area)**							
16		Employment		10,368	1,776,526	171.35	10,675	1,108,736	103.86
17		Education		40,152	6,952,851	173.16	35,233	5,263,149	149.38
18		Other		237,185	5,432,965	22.91	288,491	6,108,256	21.17
19		Total		283,177	14,162,342	50.01	325,412	12,480,142	38.35
20		**Regional Victoria (excl. Metro Melbourne)**							
21		Employment		5,210	291,747	56.00	5,602	328,901	58.71
22		Education		3,874	291,765	75.31	6,013	273,451	45.48
23		Other		294,161	2,501,597	8.50	253,594	2,014,070	7.94
24		Total		299,260	3,085,109	10.31	263,062	2,616,422	9.95
25		**Estimate Number of Overseas Visitors to CCA**		**2004**			**2005**		
26					**Total**				**Total**
27		CCA Visitor Days (E8+D8) excl. Educ. and Emplt.			8,114,305				8,456,570
28		From Metro Melbourne to CCA (E19*F33)			3,165,700				2,789,679
29		From Regional Victoria to CCA (E24*F34)			31,733				26,912
30		Total visitor days per annum (F27+F28+F29)			11,311,738				11,273,161
31		**Average Daily Visitors (F30/365)**			**30,991**			-	**30,885**
32			Adj Factor						
33	(1)	Metro to CCA rate (City Survey) = 3.8/8.5	50%		22%				22%
34	(2)	Regional to CCA rate (City Survey) = 0.144/1.4	10%		1%				1%