



Sydney Road Intercept Survey

Summary Report

23 July 2019

Prepared for Moreland City Council

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Introduction

Conversation Caravan was engaged by Moreland City Council to engage with traders and users using Sydney Road to understand patterns of movement and transport preferences.

The purpose of this research was to inform Council's understanding of how its users typically arrive at Sydney Road, their primary reason for visiting, as well as demographic details (age, gender, postcode, cultural and mobility descriptors). The research was also an opportunity to understand trader's perception about how their users are accessing Sydney Road.

Research methodology

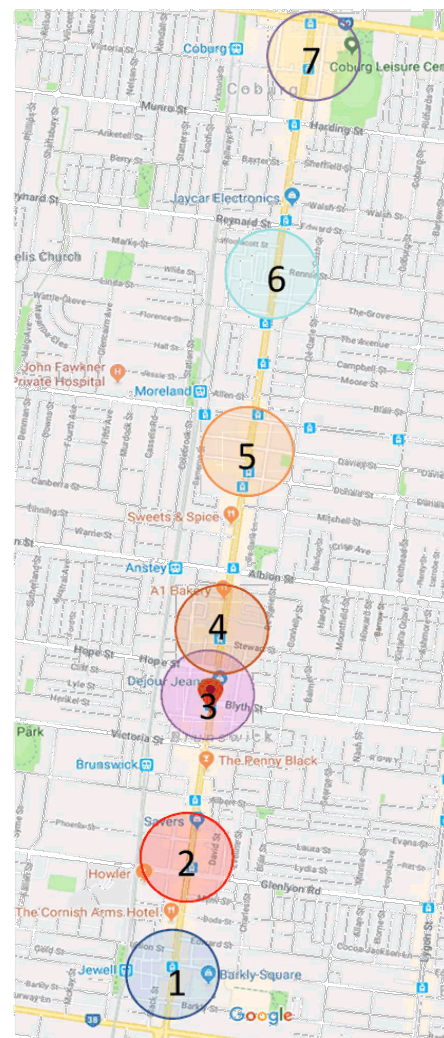
Intercept surveys were the primary research tool used for this project. Intercepting users of Sydney Road on the street as they went about their daily activities and took part in community life. Traders (staff, owners, volunteers) were intercepted within their business premise during opening hours.

The study area includes the length of Sydney Road from Bell Street to Brunswick Road and the surrounding streets. For the purpose of this project Sydney Road was divided into seven precincts. Intercept surveys were conducted up to 250m either side of these target locations (right):

1. Wilson Avenue
2. Glenlyon Road
3. Sparta Place
4. Stewart Street
5. Davies Street
6. The Grove
7. Victoria Mall.

Intercept surveys were conducted across the study area and across various times of day (weekday and weekend). Consultation was carried out between Friday 12 July and Sunday 21 July. Appendix 1 shows the spread of hours across the seven precincts.

During the first weekend of surveying (Friday 12 and Saturday 13 July) Melbourne had its coldest day for Winter. With patches of hail and heavy rain, users recording using the car, however noted this was not their main form of transport used (view Appendix 2 User Data).



Participation

More than 1000 intercept surveys were conducted across the research period this included:

- 854 Users (shoppers, visitors)
- 255 Traders (owner, staff volunteers).

Summarised below is the demographic makeup of each of these target stakeholders. More detail can be found within Appendix 2 User Data and Appendix 3 Trader Data.

Despite the short length of the intercept survey (2 min average) some users chose to abandon the survey part way through, therefore not all sections have a response tallying 854 users.

Users of Sydney Road

The user segment represents people intercepted out and about on Sydney Road. This segment included those *living* on Sydney Road or on a side street; we intercepted this group as they were returning home from work (commuting), leaving home to travel into the City or somewhere else, or enjoying the backyard experience of Sydney Road (exercising, eating, shopping).

This segment includes those *working* in the study area; we intercepted them as they were walking with colleagues or taking a lunch break; going to or from work and moving their car.

We also intercepted those for which Sydney Road is a *destination* for their weekly grocery shop, iconic fashion (Dejour jeans, bridal wear, op shops and vintage clothing) or a place where they can bar and restaurant hop across the day.

We also intercepted *tourists* (mainly from Sydney) that had stumbled into the Sydney Road or, arrived with or had been dropped off by a friend.

Gender and Age

Participation across the gender was even, with a slightly higher proportion of females participating than males. This is comparable with data related to shopping habits (grocery and fashion) across the genders where males account for 45% of shopping trade and women for 55%¹.

<u>Female (428)</u>	<u>Male (392)</u>	<u>Other (2)</u>	<u>Prefer not to say (1)</u>
<17 (9)	<17 (10)	24 – 35 (2)	18 – 23 (1)
18 – 23 (36)	18 – 23 (29)		
24 – 35 (146)	24 – 35 (120)		
35 – 50 (136)	35 – 50 (101)		
51 – 65 (71)	51 – 65 (80)		
66 – 75 (21)	66 – 75 (39)		
75> (6)	75> (13)		

Average Spend

Users were asked to record *their likely spend across their total trip*, for some this was easy as they were at the end of their visit and therefore able to add up their expenditure, where for others, at the start of their trip estimating was a little difficult.

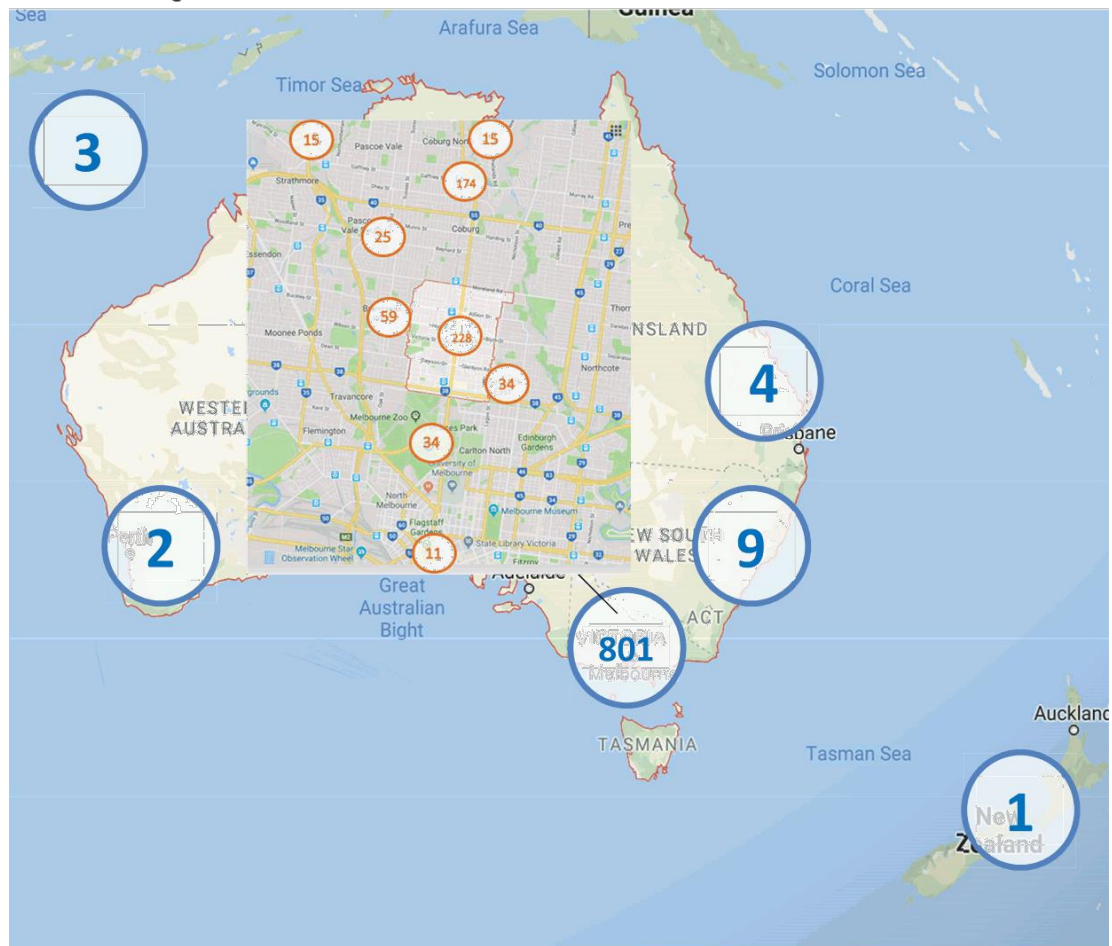
Across the user segments the highest spend category reported was *Under \$50* (32%). The next largest category was *Less \$20* (26%) then *\$50 to \$100* (19%).

¹ Kumaravel, R., (2017) *Consumer Shopping Behaviour and the role of women in shopping*. Vol 7 Research Journal Social Science and Engagement.

Location

The majority (94%) of people intercepted lived nearby or in Greater Melbourne, the top nine postcodes where these users reside is shown in Diagram 1. Local users account for 69% (595) of people intercepted recorded postcodes for this local audience is shown within the insert map. A small portion of people lived in other areas of Australia, New Zealand or further afield (Singapore, Canada, Italy) as also shown in diagram 1 below.

Diagram 1 Home Postcode



Language Spoken

Users of Sydney Road were asked if they spoke another language other than English at home, 269 (32%) of people spoke another language other than English, 556 (66%) did not speak another language and three preferred not to say.

During our engagement many commented on the confusing streets signs, tow away zones and understanding when and where they were able to park their car. Perhaps consider ways to simplify existing road signage and rules that can be easily understood by a person for whom English their second or even third language.

Time spent on Sydney Road

Majority of users spent between 1-2 hours (26%) and between 30 minutes to 1 hour (25%) on Sydney Road. Grocery shopping and eating and drinking were the main purposes for visiting Sydney Road and this is consistent with the time spent, with some users doing quick or longer grocery shops and having a quick coffee or longer sit-down meal.

There were users (10%) who spent 15 minutes or less doing a quick grocery shop and there were others who took their time and spent anywhere from 30 minutes to 4 hours grocery shopping. Users walking their dog or exercising also spent a shorter amount of time on Sydney Road.

People who spent more than 8 hours (5%) on Sydney Rd were typically working though some were having a leisurely day on Sydney Road, eating, shopping and socialising.

Purpose of visit to Sydney Road

There were two predominant reasons for using Sydney Road, grocery shopping and eating and drinking. A number of users surveyed also worked on Sydney Road or in the area, or lived in the area. There were also smaller representations such as passing through, professional appointments, using the laundromat, beauty treatments, exercising and utilising community facilities.

Traders

A total of 255 traders were spoken to with representation of 131 business owner/managers, 114 staff members and three volunteers. Staff members who worked on Sydney Road worked in various roles from full-time, part-time, casual and also worked on a variety of days and times across the week.

Some traders have been there well over 30 years, while some other businesses were new to the area. 'I just opened two weeks ago', owner of a fashion retail business. A couple of businesses also advised they were in their last two weeks of business and would be moving their business to an online shop.

Business Type

A variety of businesses were surveyed, the largest group were food and beverage accounting for 76 of businesses (30%) surveyed. Fashion retailers (retail and opportunity shops) were the next largest category accounting for 48 businesses (19%). Specialty retailers (tobacco, florist, electronics included) accounted for 25 businesses (9%) and bridal related businesses (fashion, cakes, stationary) accounted for 22 businesses (8%).

A summary of business types and the included sub categories is shown below.

Business Type	Number
Beauty and body-related services (hair, beauty, massage)	17
Bridal shopping (fashion, cakes, stationary, accessories)	22
Fashion retail (fast fashion, designers, second hand stores)	48
Food or beverage (casual takeaway, dine in)	76
Grocery Shopping (convenience retail, bottle shop, cultural grocery stores)	21
Medical services (doctors, physiotherapists, medical specialists, chemists)	15
Other (Pawn Shop, Discount Retail, Art Shop/Gallery, Car Share)	11
Professional service (Real Estate, Accountant, Tailor, Travel Agent)	19
Specialty retail (tobacco, florist, electronics)	25
Total	254

Precinct

The precinct in which traders were surveyed was fairly equally represented between 8% - 16% each precinct, with the exception of the Stewart Street precinct having a larger representation of 28%.

Some traders in some precinct areas were underrepresented due to the number of vacant shop fronts or the businesses being closed at the time of surveying, despite the shop sign stating their business was open. There were also a handful of traders who did not wish to participate, citing limited English or being time poor (with customers) as reasons they were unable to participate.

Feedback about the VicRoads Consultation

Many of the participants (traders and users) we spoke with had heard about the VicRoads proposal for Sydney Rd. Hearing about it in local media (newspaper, traders association, social media) or through a fellow trader. The majority of the traders recalled being visited by a representative and/or participated online.

Some had provided their feedback either at an on street pop up or online. Whereas the majority of people we spoke with had not yet participated or provided feedback.

The VicRoads consultation process attracted the following feedback:

- Online survey was confusing "understanding the options online was confusing."
- Lost confidence in government processes "we gave feedback on the rail crossing, we wanted it underground. We fought hard. What's the point in participating in this one."
- People feel disempowered. "Vic Roads has already made up their minds, nothing is going to change that."
- Concerns over local neighbourhood "I have seen Vic Roads (proposals), I am concerned about the impact on the smaller streets".
- Preference of options "Option 3 is preference, anything that encourages public transport for less pollution and walking and cycling".
- Opinions from people who utilise the area "I'm a cyclist, I don't think cycling paths need to be on Sydney Road, I'd prefer super tram stops. There is a perfectly good bike lane behind the street." "Remove the parking from the street, (I) have seen the project online". "Preference for removing cars, (I) use the Upfield's path however that is too narrow."
- "Better access for bikes and pedestrians balanced with the needs of drivers and businesses".

Trader Concerns

Traders were not directly asked about the VicRoads project however provided feedback as part of the conversation, which was recorded and presented to the project team for review.

Some were concerned about the removal of on street carparking and the impact it would have on their business:

- "Our biggest concern is if they take out the parking, people will not know we are here." This business relied on passing cars, pulling in to collect something quickly.
- "On street parking is needed to make it easier for deliveries and delivery drivers (Uber eats, Deliveroo)". Food and beverage businesses frequently had motorcycles and bicycles parking in front of their shop to access their shops.
- The fear of, or getting a fine was perceived to have scared away customers "if they take away car parking, it makes it hard for clients to get their hair done, they are worried about being fined".

User Insights

Summarised below are the key insights from the user survey, using the modes of transport as the basis for this analysis.

Who's driving their car

Users who drove their car accounted for 334 people (39%), car use was higher among the working population with 76 of the 111 workers driving to Sydney Road. Driving was preferred by older people with 21 of the 79 users aged between 65 - 75 and over 75 driving to Sydney Road.

People who drive their car to Sydney Road are generally people who live a distance from Sydney Road or locals who need their car due to the size or weight of what they are buying. Car drivers were accessing bridal stores or speciality stores and may have travelled from anywhere in Victoria.

Users driving also include those that are stopping to pick up a coffee or something to eat before they continue on their commute or final destination. Of those driving at the time of intercept, 41 (12%) do not usually drive to Sydney Road. Walking was reported as their usual, preferred form of transport. This corresponds with the poor weather reported at the start of the survey period.

Where do we park

Users have their *favourite* carparks, that is where they know they are likely to secure a carpark that has a suitable time allocation for their visit. Users typically parked in an off-street carpark (36%) or on Sydney Rd (33%). Many users reported parking in the more well-known off-street carparks, Coburg Recreation Reserve, Barkly Square or behind Coles in Coburg or behind Zagames.

Some drivers parked their car in these preferred locations and then used the Tram to access the rest of Sydney Road. Parking on Sydney Road was also favoured by those driving.

Who prefers to walk

After driving, walking was the second largest mode of transport used by 263 participants surveyed (31%). Walking was the primary mode of transport for 82% (218) of people outside of intercept times.

The largest age bracket of walkers were aged between 24 - 35 and accounted for 85 (32%) of all walkers. Despite walking, the primary reason for 84 of these users on foot was shopping, 67 (79%) of these users anticipated spending between Under \$50 (36), \$50 - \$100 (22) and Over \$100 (9).

Walking was the second preferred mode of transport for older people with 20 of the 79 users aged between 65 - 75 and over 75. Reasons site were no longer holding a license and feeling safe in their community.

Walking was preferred by local residents who found it easier and more time efficient to walk compared to driving. It was considered faster, due to congestion and traffic and easier than trying to find a carpark "I generally avoid driving on Sydney Road because of the traffic."

Many residents that were driving at the time of surveying were quick to follow this up with "we typically walk" feeling almost ashamed for driving a short distance. Of those driving at the time of intercept, 23 of the 41 people that used another form of transport preferred walking and lived within 3056, 3057 and 3058.

Who's using public transport

After driving and walking, public transport was the preferred mode of transport for 157 users (18%); trams were the preferred mode with 111 (13%) people taking a tram, 25 (3%) catching a train and 21 (2%) taking a bus.

Reason for visiting Sydney Road were evenly spread across shopping (59) and eating/drinking (50). Public transport was used more widely used in Precinct 1, Precinct 2 and Precinct 7 when compared to other areas, this also corresponds with the increased numbers in these areas.

Public transport use was balanced across gender, with 75 males and 74 women using public transport.

Who rides their bike

Bike riders accounted for 70 (8%) of participants surveyed. Of the 70 who rode their bikes, 61 (87%) people use bikes as their main mode of transport when utilising Sydney Road. The other 9 (14%) participants normally used cars (4), trams (3) or walked (2).

Precinct 1 had the highest portion of bike riders with 30 (42%) bike riders in the Wilson Avenue Precinct, with the working (33%), eating and drinking (26%) and shopping for groceries (23%) cited as the reason for visiting Sydney Road.

The Glenlyon precinct had 16 (22%) of bike riders, the Sparta place precinct and the Victoria Mall precinct had 6 (8%), the Stewart street precinct had 10 (14%), the Davies street precinct had 2 (2%), the Grove precinct had no bike riders (0%) of users surveyed.

Who catches an Uber

Using a rideshare or taxi service accounted for 11 participants. Using this mode was often coupled with another option "walk here, buy too much and catch an Uber home", "catch public transport (stay out too late), catch an Uber home.

Uber was also used by 2 people working in the area who found it difficult to access car parking, and/or were unable to move their car during the day "I have to catch an Uber because parking is too hard to manage while working".

Taxi was also used by an older person accessing a professional service.

Traders also noted that users often get dropped off at their premise by an Uber or call their users a Taxi after a night out at dinner (food and beverage) or a beauty appointment.

Who uses other forms of transport

Other forms of transport accounted for 13 users. This included coming or being dropped off by a friend (8), skateboard (2), the use of a mobility scooter (2) and scooter (1).

One scooter user found navigating Sydney Road difficult "pedestrian paths are too narrow for scooters and the traders put their chairs out on the street makes it difficult for me to access. This is worse when there are works on the footpath then I have to go on the road. There is not always a ramp put out."

One user who was dropped off, typical drives and commented that "trams hold the cars and then cars try to overtake and move into the bike lane; needs improving is dangerous".

Other forms of transport were taken by tourists (3) and users eating or drinking in Sydney Road (11).

User feedback on their preferred mode of transport

Users were not directly asked about the VicRoads project or ideas to improve their experience however provided feedback as part of the conversation. Summarised below are some verbatim comments related to users travel preferences.

Driving

Some comments from those who drive:

- Needing longer time allocations for parking, particularly those coming to watch the VFL, working in the area or older people with mobility issues "the times zones for parking are not suitable, they aren't realistic".
- More off street carparking "remove carparking off Sydney Road and create more off street parking".
- Different parking restrictions and time limits across the precincts made it confusing for some to understand.

Walking

Some comments from those who walk:

- Sidewalks are narrow, especially in areas where traders have street furniture on the footpath and cyclists lock their bikes to traffic guards "people in bars spill over into the street".
- Expanding the pathway network was noted as an extended benefit of the VicRoads project "(I'd like) tram and bike lanes and expanded footpaths".
- Unevenness of footpaths (potholes, raised and uneven) "footpaths are full of potholes and they are too narrow and uneven."

Public transport

Some comments from those using public transport:

- Improving the reliability and speed of public transport "public transport can run late due to traffic." "Around 5 or 6pm public transport is too crowded, (we) need more frequent trams".
- Advocating for weekend bus service "I have to drive my dad to Sydney Road on Sunday because the buses don't run."
- Public transport users recognised the interferences cars had on their transport choice and wanted to see this improved "cars should need to give way to trams" and "trams get stuck behind cars".

Bike riding

Some comments from those who ride:

- Utilisation of the existing bike path "I'm a cyclist, I don't think cycling paths need to be on Sydney Road, I'd prefer super tram stops. There is a perfectly good bike lane behind the street."
- Improve the safety of riding a bike for cyclists "more bike lanes, doesn't feel safe for cyclists"; "bikers getting car doored"; "as a cyclist I find Sydney Road awful, (I) use the back streets and crossing these streets I use the pedestrian crossing to cross with my bike".
- "I find the VicRoads proposal encouraging and might consider buying a bike."

Trader Views

Traders were asked to comment on the travel patterns and preferences of their customers. The majority of traders provided a considered response when determining how their customers travelled to their business. Only 50 of the 255 traders (19%) selected car as the primary mode of travel, whereas 75 traders (29%) recognised that their customers used four or more modes of travel to access their business.

Some common perceptions across the business types:

- Customers of food businesses were more typically expected to drive. Traders often see customers “park at the front then run in” or walking past “they’ll call an Uber to pick them up” wanting to get home and enjoy their meal.
- Customers with medical appointments were more likely to drive or catch a taxi, often in poor health or coming from further distance (specialist appointment).
- Customers of speciality stores (bulky items or specialist items) were more likely to drive given the distance travelled. Traders were aware of customer locations as they had previously posted items to customers or it had come up in conversation.
- Customers who were having their hair done tended to drive, or get dropped off, especially if they were having their hair done for an event (such as a wedding) and did not want to have their hair ruined catching transport. Traders often experience customers feeling stressed or having a ‘negative experience’ instead of enjoying their beauty treatment due to parking time restrictions and the clear way. “They are always worried about getting a fine”.
- Customers who were bridal shopping were most likely to drive for a multitude of reasons, the bride and the bridal party and or family had travelled from all over the state to dress shop on a street (Sydney Road) with several bridal shops, they were collecting their dress and car is the preferred mode for the protection of the dress.
- Customers grocery shopping had two considerations which impacted their mode of transport, how far they lived from Sydney Road and the quantity of groceries they were buying.

Some commonalities exist across the precincts:

- Businesses located in the *busier* precincts were more likely to acknowledge the various types of transport modes used. Recognising that public transport and walking in particular were used by their customers. In busier areas the travel patterns of people were more visible “I see people getting off the tram”, “walk past and decide to come in.” Compared with businesses located in quieter areas (Precinct 6, Precinct 5) where the perception was that more customers travelled by car.
- Over half of the businesses within Precinct 3 Sparta selected car as the main (>90%) mode of customer travel. Largely due to the number of bridal stores and fashion retail stores in that precinct and driving being the preferred mode of transport for brides due to travelling distances and collection of dresses.

Perceptions versus reality

Shown below is a comparison of user travel preferences to the perceptions of traders when considering their customers travel preferences.

From this data comparison it is clear:

- Use and perception of Uber and Taxi use is closely matched across all precincts.
- Use and perception of public transport use is closely matched across Precincts 1 and 2. In Precinct 3 traders underestimated public transport use, whereas in Precincts 5, 6 and 7 traders overestimated public transport use.
- Use and perception of bike use is closely matched in Precincts 1, 2 and 7. In Precinct 3 and 4 traders underestimated bike use, whereas in Precinct 5 traders overestimated bike use.
- Perception of car use is overestimated in all precincts, especially in Precincts 2, 3, 4, 5 and 6 where there is more than a 20% difference.
- Perception of walking is underestimated in all precincts, especially in Precincts 3, 4, 5 and 6 where there is more than a 20% difference.

	Car		PT		Bike		Walk		Uber/Taxi	
Precinct	Trader	User	Trader	User	Trader	User	Trader	User	Trader	User
Precinct 1 Wilson Avenue	43%	36%	22%	21%	14%	15%	18%	25%	3%	2%
Precinct 2 Glenlyon Road	49%	29%	20%	19%	10%	10%	21%	38%	1%	1%
Precinct 3 Sparta Place	73%	49%	11%	18%	5%	7%	10%	24%	1%	1%
Precinct 4 Stewart Street	66%	43%	15%	16%	4%	7%	14%	33%	1%	1%
Precinct 5 Davies Street	51%	28%	29%	21%	4%	2%	15%	45%	1%	1%
Precinct 6 The Grove	71%	48%	21%	17%	0%	0%	4%	30%	3%	4%
Precinct 7 Victoria Mall	64%	50%	20%	17%	3%	4%	13%	25%	0%	2%
Total	61%	39%	18%	18%	5%	8%	14%	31%	1%	1%

Similarly, while traders are concerned with the current parking situation and any potential change that would reduce on-street car parking, users are much more positive towards these changes. Siting improvements in amenity, improved movement of public transport and improved streetscape for walking/cycling.

ANALYSIS OF SYDNEY ROAD IMPROVEMENT PROJECT CONSULTATION OPTIONS

This table summarises the expected impact on all user categories of the five options being consulted on by DoT. As all options include accessible tram stops, the accessibility benefits of these stops are not included in the analysis. The impact of each option on each user category is also shown as follows:

1 – Significant negative impact		2 – Some negative impact		3 – No/marginal impact		4 – Some positive impact		5 – Significant positive impact	
Option	Walking/Place	Cycling	Trams	General traffic	Parking	Officer comment			
1A	Widened footpaths at tram stop locations only, allowing for some placemaking and greening (4)	No change (3)	Potential for delays due to increased congestion as cars now merge into a single lane at tram stops (2)	Potential for delays due to increased congestion as cars now merge into a single lane at tram stops (2)	Minimal loss of parking (3)	This option presents some modest opportunities for wider footpaths, and greater placemaking and greening. However, it entails the loss of the clearway and is likely to delay trams and motorists due to pinch points created at the tram stops.			
1B	No change (3)	No change (3)	No change (3)	No change (3)	Minimal loss of parking (3)	This option represents a “do-minimum” with new accessible tram stops only. It provides no benefit to tram running, cyclist safety or place, but does not entail loss of road capacity or parking.			
2	No change (3)	No change (3)	Potential for improved speed and reliability during peak hours however this is subject to driver compliance which is unlikely (3-4)	Potential for delays as motorists may only use left lane during peak periods (2)	Minimal loss of parking (3)	This option potentially improves tram running on Sydney Road which is among the slowest tram corridors in Melbourne. However, as the dedicated tram lane operates only in peak and is enforced by signage rather than physical separation, it is unlikely to provide significant benefit as some motorists will not comply.			

Option	Walking/Place	Cycling	Trams	General traffic	Parking	Officer comment
3	Widened footpaths along entire corridor, allowing for placemaking and greening (5)	Separated bike lane along entire corridor, improving safety and attracting more cyclists (5)	Likely delays as trams must share single lane with motorists at all times however are no longer delayed by motorists pulling into/out of on street parking (impact unclear)	Likely delays as motorists must share single lane with trams at all times (1)	Loss of parking along entire corridor (1)	<p>This option represents the most radical change however is the only option which improves cycling conditions on Sydney Road. It also provides significant opportunities for placemaking and greening by extending the kerb along the entire corridor.</p> <p>Although removal of the clearway may result in some delay to tram services during weekday peak periods, this may be mitigated by reduced traffic as the road is less attractive for through traffic. Outside these times, tram running is likely to improve due to reduced delay from vehicles entering/exiting on-street parking and lower local traffic volumes searching for parking. The overall impact of this option on trams is not fully known.</p> <p>This option represents the most significant removal of car parking on Sydney Road which has the potential to impact local traders. Relocation of loading zones and pick-up/drop-off areas is likely to be required, along with placemaking and promotions activities to support business activity.</p>

Option	Walking/Place	Cycling	Trams	General traffic	Parking	Officer comment
4	Widened footpaths at tram stop locations and other selected locations only, allowing for some placemaking and greening (4)	Potential for negative safety impact as there is no separated lane and motorists may attempt to overtake trams causing conflict with cyclists (2)	Likely delays as trams must share single lane with motorists at all times (1)	Likely delays as motorists must share single lane with trams at all times (1)	Loss of some parking (2)	<p>This option is similar to Option 1A but provides for more opportunities to widen footpaths while still retaining parking. It may reduce safety for cyclists due to inconsistency of conditions and the likelihood of motorists attempting to overtake trams.</p> <p>Tram travel speeds are likely to be negatively impacted as trams would share a single lane with vehicles at all times, and also continue to be held up by traffic caused by vehicles searching for parking, as well as vehicles pulling into/out of on-street spaces.</p>