



Environmetrics
social and market research

Report

Redfern/Waterloo Branding Survey



prepared for

**City of Sydney and Redfern Waterloo Authority in respect of
the Roll Up Redfern Group**

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Contents

1. Executive Summary	5
2. Introduction	9
3. Research Method	8
4. Research Findings	11
4.1 Visiting patterns	11
4.2 Perceptions of Redfern/Waterloo	18
4.3 Visitor profile	34
Appendix	36
Leisure Segments	
Questionnaire	
Data tables	





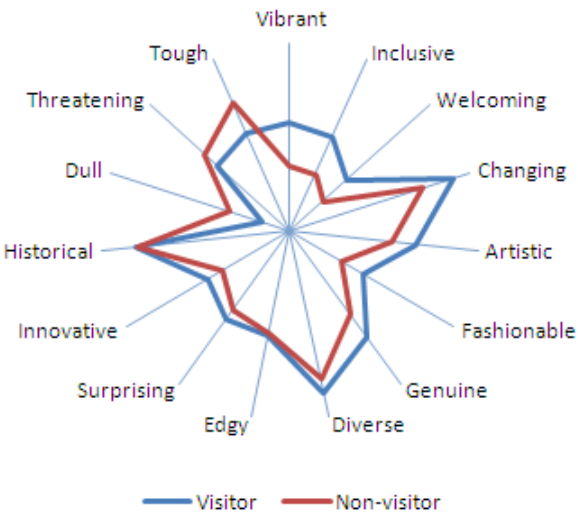
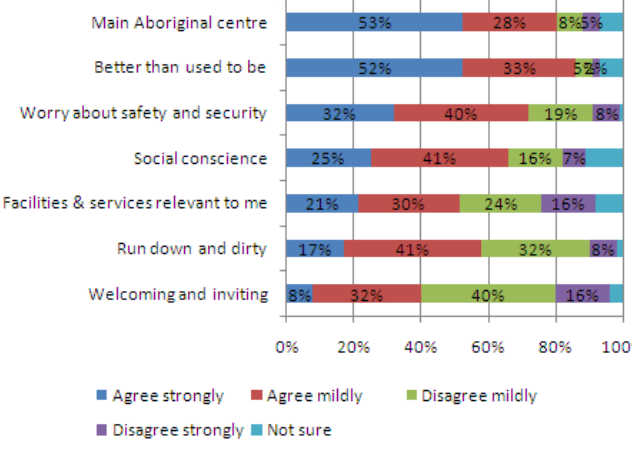
1. Executive Summary

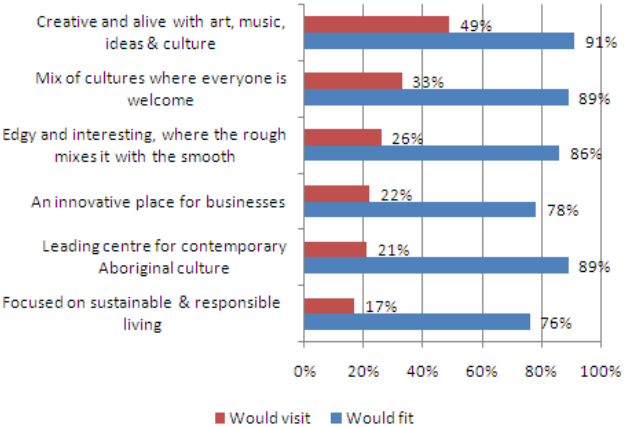
As part of an ongoing program of revitalisation, the Roll Up Redfern Group commissioned Frost Design to develop a brand for Redfern and Waterloo that functions as a lens through which marketing, public relations activity and customer interaction is filtered, in order to provide a look of fresh energy, revitalisation, professionalism and character consistent with the businesses and residents in the Precinct.

Environmetrics carried out a survey of 300 people living within 10km of Redfern Rail Station in order to gauge perceptions of the area and receptivity to potential positioning statements.

Key findings	Implications
<p>Visiting. Two-thirds (67%) of people in the survey area had visited Redfern/Waterloo in the previous 12 months.</p>	<p>Many perceptions of the area are influenced by recent experiences. It will be important for the brand to be authentic to the experiences offered to visitors.</p>
<p>Visitors. While Redfern/Waterloo visitors came from all walks of life, there was a slight emphasis on people under 30 years, people with children and those who could be characterised as 'Practical' and 'Individual'.</p>	<p>The brand strategy should have broad appeal and be meaningful to those who currently visit Redfern/Waterloo as well as potential new visitors.</p>
<p>Visit purpose. The main attractions for current visitors are shops and businesses (48%), cafes and restaurants (42%) and friends and relatives (29%).</p> <p>Cultural leisure activities like performances and events, galleries/showrooms and markets were important secondary attractions.</p>	<p>The brand strategy could draw upon the distinctive cultural leisure experiences offered in the area.</p>
<p>Places known. The places in Redfern/Waterloo that were most widely visited were the newer leisure-related places such as Danks Street and Carriageworks along with cafes and restaurants.</p> <p>Other places that can support these popular locations in a 'creative leisure' zone are the Eveleigh Markets and art galleries.</p> <p>More practical locations such as the rail station and ATP were also visited quite widely.</p> <p>While features such as the Block and the Rabbitohs were widely known and associated with the area, few people had visited them in the past 12 months.</p>	<p>The evolving character of Redfern/Waterloo will be shaped by ongoing experiences of the emerging leisure and cultural experiences that are increasingly offered.</p> <p>Identification with local institutions such as the Block and the Rabbitohs is likely to be sustained by media references rather than by personal experiences.</p>



Key findings	Implications
<p>Words. The following graph shows how descriptive words were linked with Redfern/Waterloo by visitors and non-visitors.</p> <p>Fig. 1. Word association (visitor vs non-visitor)</p> 	<p>Strategies for branding, communication and new offers (activities/experiences) can draw on the positives of:</p> <ul style="list-style-type: none"> History/heritage, diversity and change. <p>Strategies should seek to counter the weak areas:</p> <ul style="list-style-type: none"> Threatening, tough Not welcoming, vibrant, inclusive or innovative.
<p>Descriptions. The following graph shows how well descriptive statements were thought to fit with Redfern/Waterloo.</p> <p>Fig. 2. Descriptive statements</p> 	<p>Strategies may reflect the key characteristics:</p> <ul style="list-style-type: none"> Aboriginal community A place that is improving. <p>Strategies should seek to counter the perceptions that Redfern/Waterloo –</p> <ul style="list-style-type: none"> Is unsafe Does not offer relevant things to see and do Is run down and dirty Is not welcoming.
<p>Places known. The listed places that were most widely associated with Redfern/Waterloo were:</p> <p>Rail station The Block Factory outlet shops Carriageworks South Sydney Rabbitohs</p>	<p>Places like the Block and the Rabbitohs have a powerful impression on perceptions, however they are not places that attract visitors.</p> <p>Association with factory outlet shops continues although these outlets are no longer as prominent as they used to be.</p>

Key findings	Implications																					
<p>Places known. The listed places that were least associated with Redfern/Waterloo were:</p> <p>Danks Street Fashionable cafes & restaurants Vintage furniture shops Art galleries Hotels and nightclubs</p>	<p>There is scope for branding, communication and activity strategies that bring more focus to these under-recognised places.</p>																					
<p>Good things about Redfern/Waterloo</p> <p>Verbatim comments encompassed practical aspects of proximity and access (transport) and open space, as well as things to do (theatre, art galleries, cafes, shops and markets) and qualities of scale (village), improvement (upgrades and gentrification) and character (historic, vibrant, funky).</p> <p>It was worrying to see that 14% overall, and 25% of non-visitors, could not give any good things about the area.</p>	<p>The brand strategy can help bring coherence to the range of positive perceptions of the place.</p> <p>Communication strategies can help bring prominence to good news stories and events/activities designed to promote the good things about the area.</p>																					
<p>Drawbacks and limitations</p> <p>The main drawbacks related to the sense of safety and to problems related to social disadvantage. Other drawbacks related to traffic and parking problems, limited public transport and rundown/dirty/graffitied streetscapes.</p> <p>It appears that negative perceptions are stronger and more coherent than perceptions of good things about the area.</p> <p>Only 8% were unable to suggest drawbacks and limitations, compared with 14% unable to suggest good things.</p>	<p>It is clear that the future strategies for branding, communication and activities in the area should be directed to overcoming strong negative perceptions, especially relating to safety and social disadvantage.</p>																					
<p>Positioning. The following graph shows that all the suggested positions were thought to fit Redfern/Waterloo, but some were more attractive to visitors than others.</p> <p>Fig. 3. Positioning statements</p>  <table border="1"> <thead> <tr> <th>Positioning Statement</th> <th>Would visit (%)</th> <th>Would fit (%)</th> </tr> </thead> <tbody> <tr> <td>Creative and alive with art, music, ideas & culture</td> <td>49%</td> <td>91%</td> </tr> <tr> <td>Mix of cultures where everyone is welcome</td> <td>33%</td> <td>89%</td> </tr> <tr> <td>Edgy and interesting, where the rough mixes it with the smooth</td> <td>26%</td> <td>86%</td> </tr> <tr> <td>An innovative place for businesses</td> <td>22%</td> <td>78%</td> </tr> <tr> <td>Leading centre for contemporary Aboriginal culture</td> <td>21%</td> <td>89%</td> </tr> <tr> <td>Focused on sustainable & responsible living</td> <td>17%</td> <td>76%</td> </tr> </tbody> </table>	Positioning Statement	Would visit (%)	Would fit (%)	Creative and alive with art, music, ideas & culture	49%	91%	Mix of cultures where everyone is welcome	33%	89%	Edgy and interesting, where the rough mixes it with the smooth	26%	86%	An innovative place for businesses	22%	78%	Leading centre for contemporary Aboriginal culture	21%	89%	Focused on sustainable & responsible living	17%	76%	<p>The statements with the widest appeal for motivating visits to the area were:</p> <ul style="list-style-type: none"> • Creative and alive with art, music, ideas and culture. • Mix of cultures where everyone is welcome.
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2. Introduction

As part of an ongoing program of revitalisation, the Roll Up Redfern Group commissioned Frost Design to develop a brand for Redfern and Waterloo that functions as a lens through which every marketing, public relations activity and customer interaction is filtered, in order to provide a look of fresh energy, revitalisation, professionalism and character consistent with the businesses and residents in the Precinct.

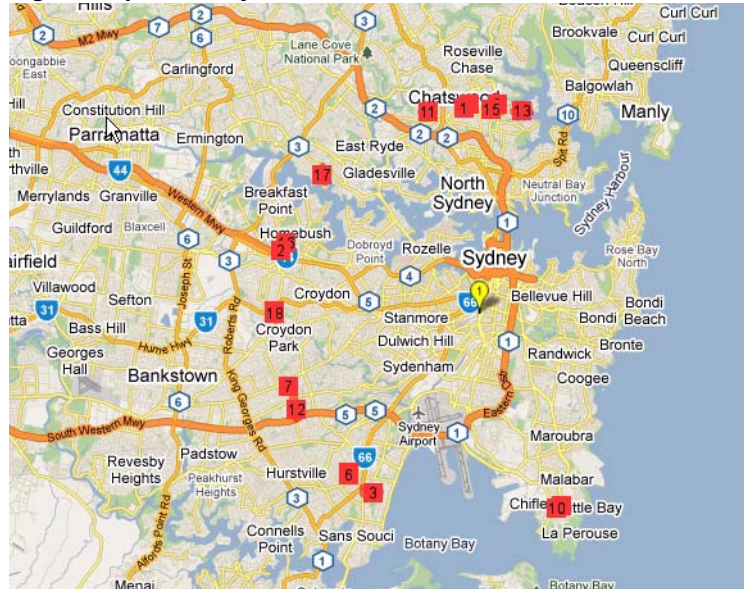
Environmetrics was commissioned to conduct a survey of perceptions of Redfern Waterloo to help inform development of the brand strategy. The survey information will have a range of uses beyond the brand strategy, including communications and programs offered for residents, businesses and visitors.

This report presents the findings from the survey along with implications across a range of strategic areas.

3. Research Method

We conducted telephone interviews with 300 people who live within a 10km radius of Redfern rail station. The catchment was selected as representing people who would be most likely to visit Redfern Waterloo and whose views would be pertinent to the development of a brand identity for the area. The following map shows the survey area.

Fig. 4. Map of survey area



The sample was selected to be representative of the resident population in terms of gender and age profile, and generally representative of the Australian



population in terms of socio-economic characteristics. The average length of interviews was 13 minutes.

The questionnaire was designed to gather the following information:

- demographic profile (age, gender, working status, household composition, owning/renting, income, language)
- behavioural profile (visiting R-W: frequency, purpose, destination)
- knowledge of R-W (awareness of the offer – major features and facilities)
- perceptions and attitudes to R-W (safety, sense of welcome, active, attractive, bargain, optimistic, relevant, etc.)
- strengths and weaknesses (open comments).

A copy of the questionnaire is in the appendix to this report.

Interviewing was carried out by the specialist telephone interviewing organisation, Fieldworks.

Data was coded and analysed using cross-tabulation to reveal meaningful comparisons between different market segments – age; gender; visitors/non-visitors; working status and presence of children.

The data tables are in the appendix to this report.

Analysis categories

Two analysis categories emerged as of particular interest in this study.

- Visitors vs non-visitors (defined as having visited in the past 12 months).
- Leisure Segments.

Leisure Segments

The Environmetrics Leisure Segments are based on surveys in Sydney, Victoria and SE Queensland. They use personality characteristics and leisure behaviour to define meaningful market segments (see Appendix for more detail). For this project, six segments can be described as follows:

Individual. These are curious and independent people who like to try new things and to keep busy. They are drawn to ideas and cultural activities. They can be quite spontaneous.

They like to be challenged and to learn and they look for originality in the world around them.

Conventional. These people are conservative, less adventurous and quite family-focused. They tend to stay with the tried and true while enjoying activities that are familiar and popular, such as sport, popular music and spectacular events.

They are not strongly drawn to ideas, instead they focus on more material things and tend to have modest ambitions. They tend to be content with what they have.



Discerning. Curious and adventurous, these people keep an eye out for new things to try. They are drawn to ideas and culture, and tend to be well organised.

Their strong sense of discernment means they may buy or participate in 'fashionable' things, but they would like to think that their decision to do so is based on good judgment rather than an urge to follow trends.

Gregarious. These people are drawn to social activities and enjoy doing things with family and friends. They are not especially drawn to ideas, but they like to mingle with others who are having a good time.

They tend to be fashion conscious and like getting dressed up. They like to stand out in a crowd, but also like to feel part of the social group. They enjoy indulging themselves and like to experiment with new things. They want to get somewhere in life: job, money, and material possessions.

Life for them has a strong social component. They are conscious of what is 'in', yet are more likely to be trend followers than setters. They are quick to adopt new fashions and ideas, but also quick to move onto the next one.

Unhurried. These easy-going people are interested in the world around them, but they prefer to do things in their own time.

They consider themselves 'homebodies' and like to garden and potter around the house. They don't say they want to 'achieve a lot', probably because they tend to be older and are reasonably set in their ways, however they still want to enjoy themselves.

Practical. These people are very orderly and like to plan ahead. They tend to be the ones who organise outings for friends and family. They prefer participatory activities to purely social ones. They tend to engage in hobbies and attend club meetings and local activities.

Their leisure is mostly of an active and functional nature. Gardening around the yard and making or fixing things around the house are often considered to be 'leisure activities'.

About this report

- Some percentages have been rounded off. When this occurs, totals may be a little more or a little less than 100.
- Percentages add to more than 100 when multiple responses are possible.
- When the term 'significant' is used in this report, it refers to a statistically significant difference between two percentages.
- Figures contained in this report are estimates derived from the sample survey which was carried out in accordance with accepted market research methods. The results are subject to limits of statistical error.



4. Research Findings

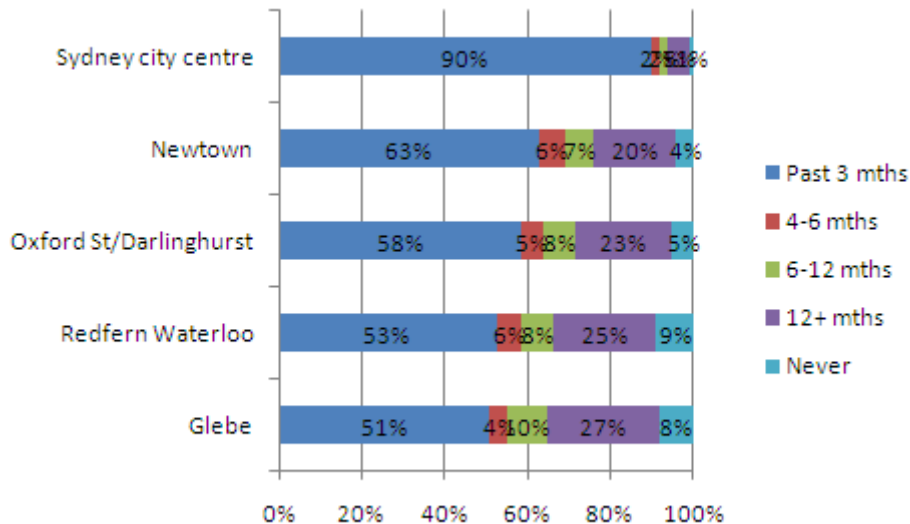
4.1 Visiting patterns

This section of the report discusses patterns of visiting Redfern/Waterloo and other local areas.

4.1.1 Recent visits

The following graph shows the frequency of visiting Redfern/Waterloo and other local areas.

Fig. 5. Visits to CBD and local centres



Base = 300

It is clear that the Sydney city centre was the most frequently visited location as 90% had been there in the previous three months. The smaller centres were all visited less than the city centre. There was not a great difference in the degree to which the smaller centres were visited, however Newtown was visited somewhat more often than the other local centres.

Two-thirds (67%) of people in the survey area had visited Redfern/Waterloo in the previous 12 months. This suggests that their perceptions are based on recent experiences.

Less than 10% of people had never visited Redfern/Waterloo or Glebe. This was even smaller (4-5%) for Newtown and Oxford St/Darlinghurst.

More frequent visitors to Redfern Waterloo had the following characteristics:

- More likely to be under 30 years

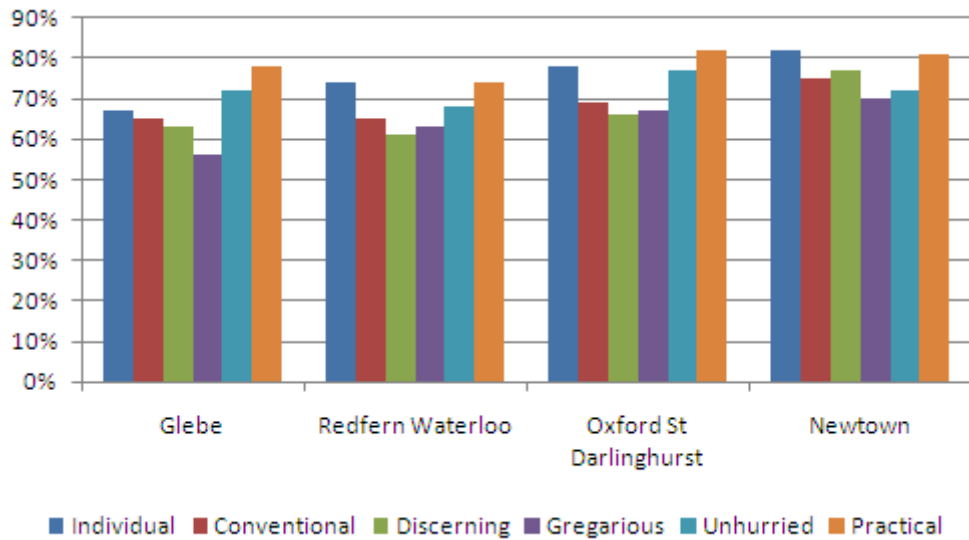


- More likely to be working
- More likely to have children in the household.

Leisure Segments

The following graph shows patterns in visiting the four local centres according to the six Leisure Segments (described in Research Method section).

Fig. 6. Leisure segments visits to local centres



Base = 300

As would be expected for local centres that offer a range of services and facilities, these centres attract people from all of the segments.

Redfern/Waterloo has attracted slightly more from the 'Practical' and 'Individual' segments.

It is consistent that the Glebe profile features 'Unhurrieds' and is somewhat lower on 'Gregarious', and the Newtown profile features the 'Individual' segment.

Visitors vs non-visitors

Visitors to Redfern/Waterloo will be different from non-visitors in two ways:

- They have had reason to go there and may have overcome barriers of distance and perception to make the visits. They are likely to be more receptive to the current 'offer' than non-visitors.
- They know the area from first-hand experience as well as from media accounts and public opinion.



Implications for Redfern/Waterloo

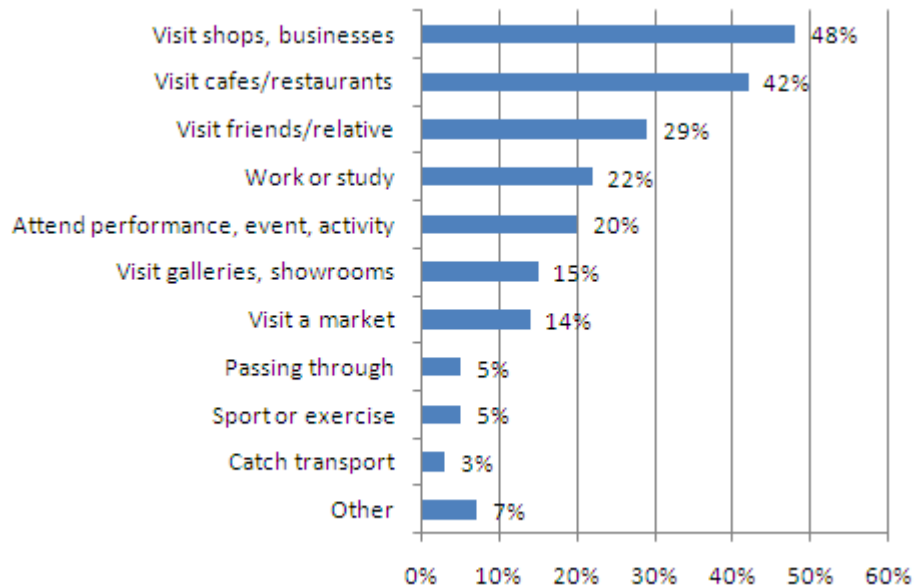
Redfern/Waterloo was quite widely known by recent visiting experience. It will be important for the brand to be authentic to the experiences offered to visitors.



4.1.2 Purpose of visit to Redfern/Waterloo

People who had visited Redfern/Waterloo in the past 12 months were asked to nominate the main purposes for their visits. Many people were able to nominate more than one purpose, and on average, people mentioned two things. The following graph summarises the findings.

Fig. 7. Purpose of visit to Redfern Waterloo



Base = Visited RW in past 12 months (198). Note: percentages add to more than 100 due to multiple responses.

It is clear that the main attractors are shops and businesses (48%), cafes and restaurants (42%) and friends and relatives (29%).

Cultural leisure activities like performances and events, galleries/showrooms and markets were important secondary attractions.

The following differences emerged:

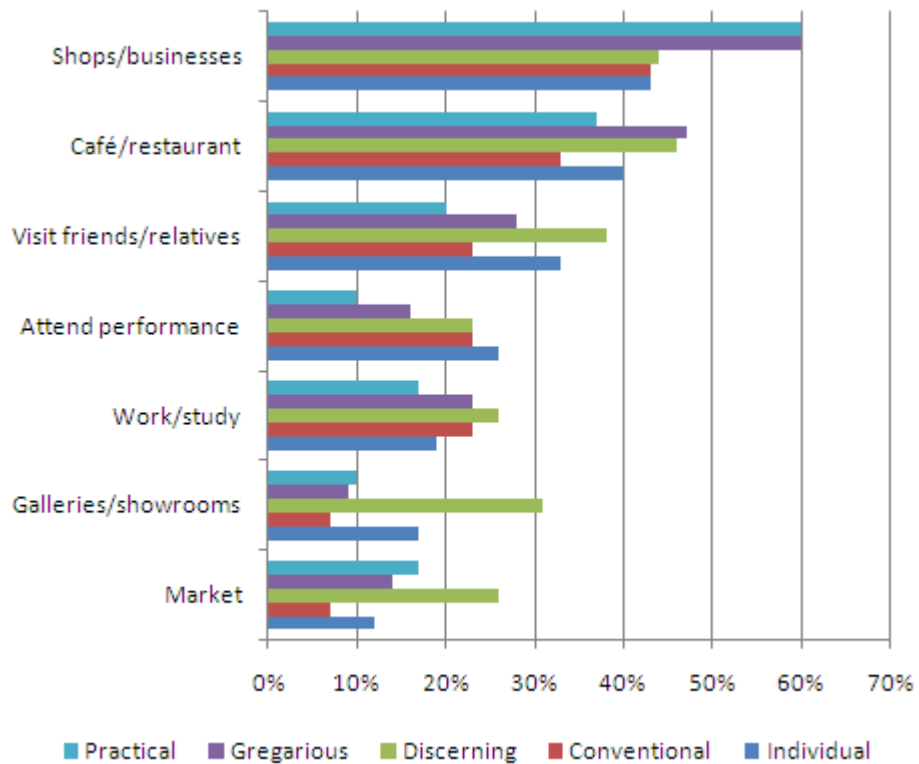
- People under 30 years were more attracted by friends/relatives (45%).
- People over 30 years were more attracted by cafes/restaurants (44%).
- People over 50 years were more attracted by shops/businesses (58%); galleries/showrooms (24%).
- People with children were more likely to visit due to work or study (30%).

Despite the prominence of the Rabbitohs in Sydney, very few people visited Redfern in order to do or watch sport.



The following graph shows how different purposes drew the Leisure Segments to Redfern/Waterloo. The 'Unhurried' segment is not shown due to small sample size.

Table 1. Purpose of visit according to Leisure Segments



Base: Practical (41); Gregarious (69); Discerning (65); Conventional (47); Individual (57)

It is particularly notable that the markets and galleries/showrooms have strong appeal to the 'Discerning' segment who are also drawn to visit Redfern/Waterloo by friends and relatives.

As may be expected, the 'Gregarious' are drawn to cafes and restaurants as well as shops and businesses.

Implications for Redfern/Waterloo

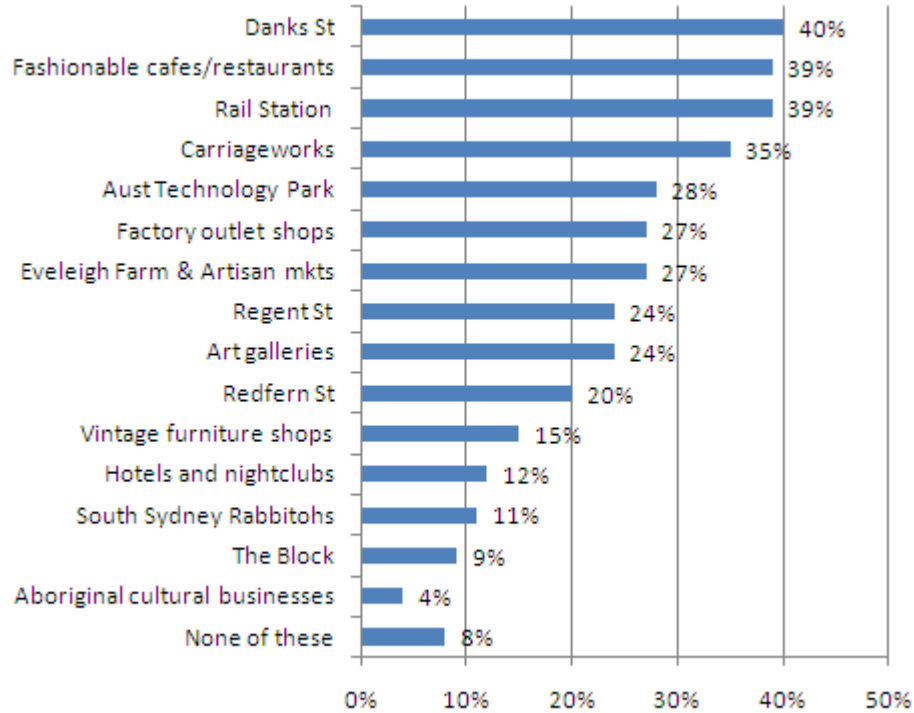
Redfern/Waterloo was visited for a variety of purposes. The brand strategy should encompass a range of interests and activities. Events and programs should support a variety of motivations to visit.



4.1.3 Places visited in Redfern/Waterloo

Participants were asked to nominate from a list, the places in Redfern/Waterloo they had visited. The following graph shows the findings.

Fig. 8. Places visited in Redfern/Waterloo



Base = Visited RW in past 12 months (198). Note: percentages add to more than 100 due to multiple responses.

It appears that the places in Redfern/Waterloo that are most widely known from the experience of a personal visit are the newer leisure-related places such as Danks Street and Carriageworks along with cafes and restaurants.

Other places that can support these popular locations in a 'creative leisure' zone are the Eveleigh Markets and art galleries. These were visited by about one-quarter of the sample.

More practical locations such as the rail station and ATP were also visited quite widely.

While features such as the Block and the Rabbitohs were widely known and associated with the area, few people had visited them in the past 12 months.

Most differences between the Leisure Segments were not significant, however the following differences are indicative.

- Carriageworks was more visited by 'Individual' and 'Discerning' and less by the 'Gregarious'. (We note that the Carriageworks strap line on their website 'Take a risk. See something new. Feel something different.' has strong appeal to the 'Individual' and 'Discerning' segments.)
- Danks Street was visited more by the 'Gregarious' and less by the 'Discerning'.



- Redfern Street was visited more by the 'Conventional' segment.

Implications for Redfern/Waterloo

A group of destinations that can be characterised as 'creative leisure' places were most widely visited. The visiting experiences offered by these places will be vital to building a sustainable brand.

The rail station is a key location that can influence perceptions of Redfern/Waterloo.

Icons such as the Block and the Rabbitohs were visited very little and knowledge/impressions of them is based on media reports rather than on direct experience.



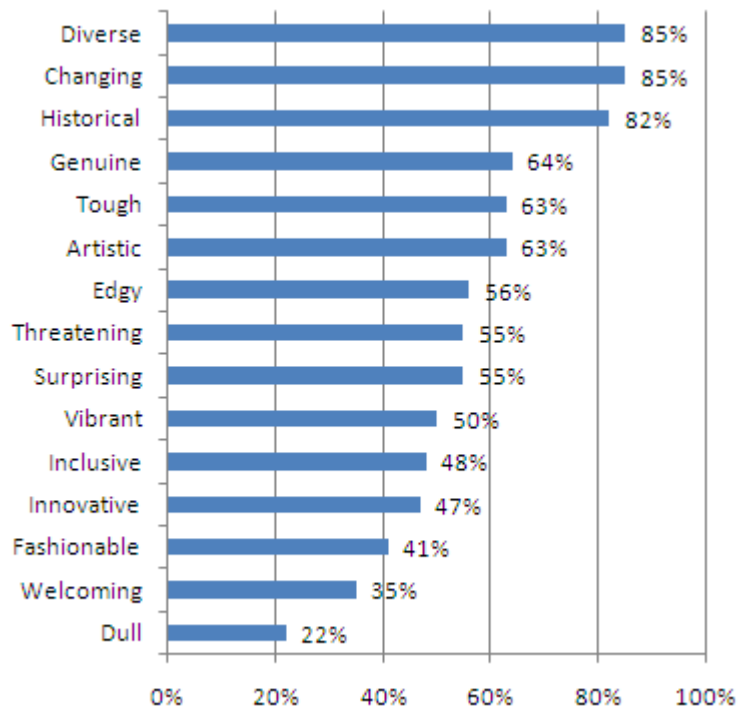
4.2 Perceptions of Redfern/Waterloo

This section discussed the perceptions of Redfern/Waterloo which were measured in a variety of ways. In a small number of cases, respondents noted that they thought of Redfern and Waterloo quite differently. When this happened, interviewers asked them to respond in terms of their impressions of Redfern rather than record 'no response'.

4.2.1 Word Association

Of a list of 15 words, participants were asked which ones fitted with their impression of Redfern/Waterloo. The following graph shows the findings.

Fig. 9. Word Association



Base = 300

Three qualities stand out as the most widely recognised aspects of Redfern/Waterloo.

- The area was most widely seen as hosting a **wide diversity** which could include social diversity as well as a variety of different precincts or streetscapes or a range of different things to see and do in the area.
- It was also widely recognised that Redfern/Waterloo is undergoing a **period of extensive change**. Given other word associations it is likely that this is seen as a change for the better. This suggests that perceptions of Redfern/Waterloo may be quite fluid, with expectations of continuing enhancement or improvement.



- The **historical character of the area** was also widely acknowledged. This sense of history may relate to the re-purposed use of former industrial sites such as Carriageworks and ATP or to the streetscapes of terrace housing, or to aspects of the social history of the area.

There was a solid core of support for impressions that Redfern/Waterloo is **genuine** and **artistic**. Together, these are strong positive characteristics for the area.

There was also a solid core of perception of the area as **edgy**, **surprising** and **vibrant** which can offer a strong foundation for a distinctive and attractive character for the area.

The level of perception as **tough** (63%) and **threatening** (55%) is of concern. **Threatening** is a very strong concept that can be a powerful deterrent to visitation.

While the area was widely seen as **diverse** (85%), it was not widely seen as **inclusive** (48%).

The area was not seen as particularly **fashionable** (41%) or **welcoming** (35%). While a centre does not need to be fashionable to thrive, it is harder to see a lack of welcome as a positive characteristic. The low response for 'welcoming' is consistent with the modest score for 'inclusive'.

While **innovation** is at the core of the purpose of ATP and Carriageworks, the concept was not strongly associated with Redfern/Waterloo in this word association question.

The low score for **dull** is helpful in building a positive and inviting brand for the area.

There were very few differences in how the Leisure Segments attributed the words to Redfern/Waterloo, except for the following:

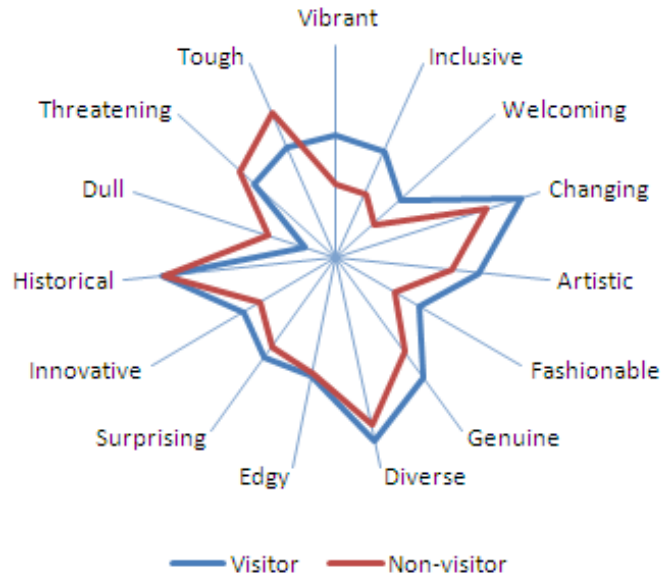
- **Surprising** was given MORE by the 'Conventional' segment.
- **Changing** was given LESS by the 'Conventional' segment.
- **Welcoming** was given LESS by the 'Practical' segment.



Visitors vs Non-visitors

The following graph compares the responses of visitors and non-visitors.

Fig. 10. Word Association (Visitor vs Non-visitor)



Base = 300

People who had visited Redfern/Waterloo in the past 12 months were much **more** likely to see the area as:

- Artistic, changing, fashionable, genuine, inclusive, vibrant, welcoming.

They were much **less** likely to see it as:

- Dull, threatening, tough.

Implications for Redfern/Waterloo

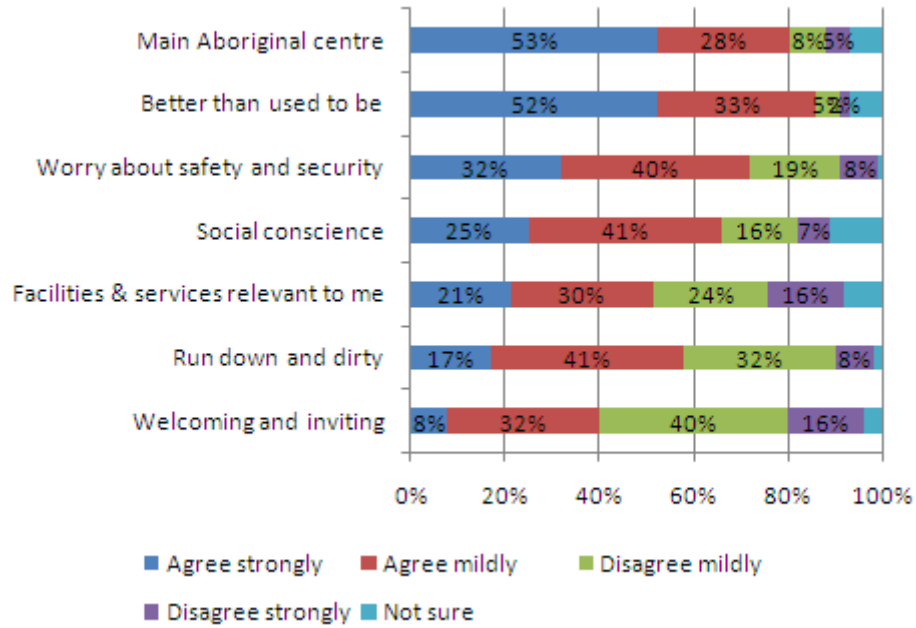
These associations give direction for a strong positive brand for the area, while also pointing towards negatives that need to be countered.



4.2.2 Perceived qualities

The survey asked participants to indicate whether or not they agreed with seven descriptive statements as shown in the following graph.

Fig. 11. Descriptive statements



Base = 300

The two most widely accepted views were that Redfern/Waterloo is Sydney’s main Aboriginal centre and that it is better than it used to be.

A high proportion (72%) agreed that Redfern/Waterloo is a place where you worry about safety and security; and 58% agreed that it is run down and dirty.

Only a modest proportion (51%) agreed that the area had facilities and services relevant to them.

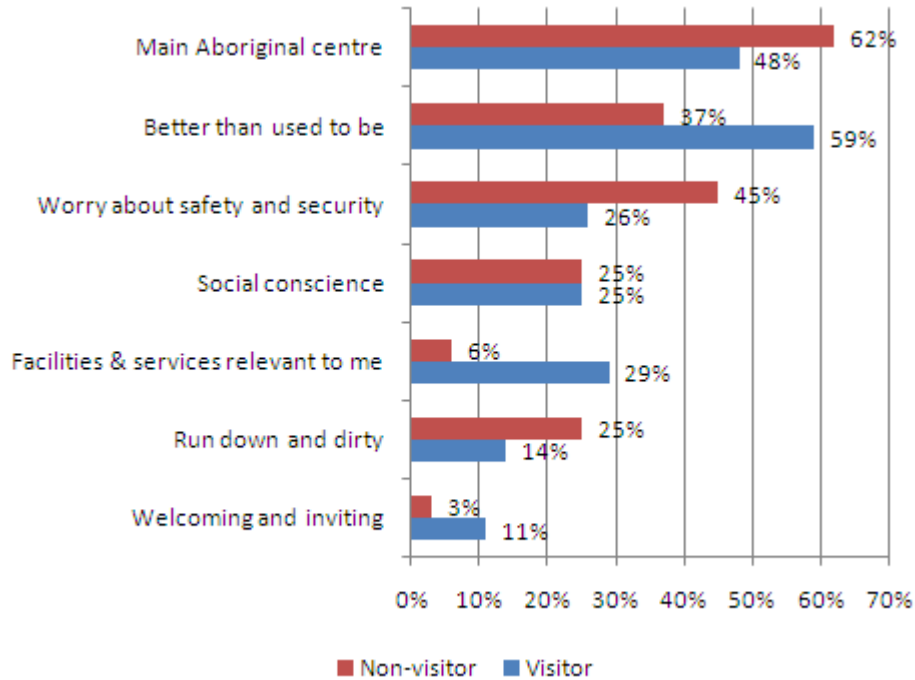
Views about ‘a place with a social conscience’ were the same for visitors and non-visitors. A proportion (11%) said ‘not sure’ which indicates that some people were unable to link this abstract concept to the place.

The weakest statement was that Redfern/Waterloo is welcoming and inviting, where only 8% agreed strongly, and only 40% agreed at all. This is consistent with the other views expressed in that a place with security concerns, run down and dirty with low personal relevance, is not a place that will be described as welcoming and inviting.

Visitors vs Non-visitors

The contrasting perceptions of visitors and non visitors are shown in the following graph of 'strongly agree' scores.

Fig. 12. 'Strongly agree' scores for Visitors and Non-visitors



Base = 300

People who had visited Redfern/Waterloo in the past 12 months were much more likely to see the area as:

- Welcoming and inviting
- Relevant facilities and services
- Better than it used to be

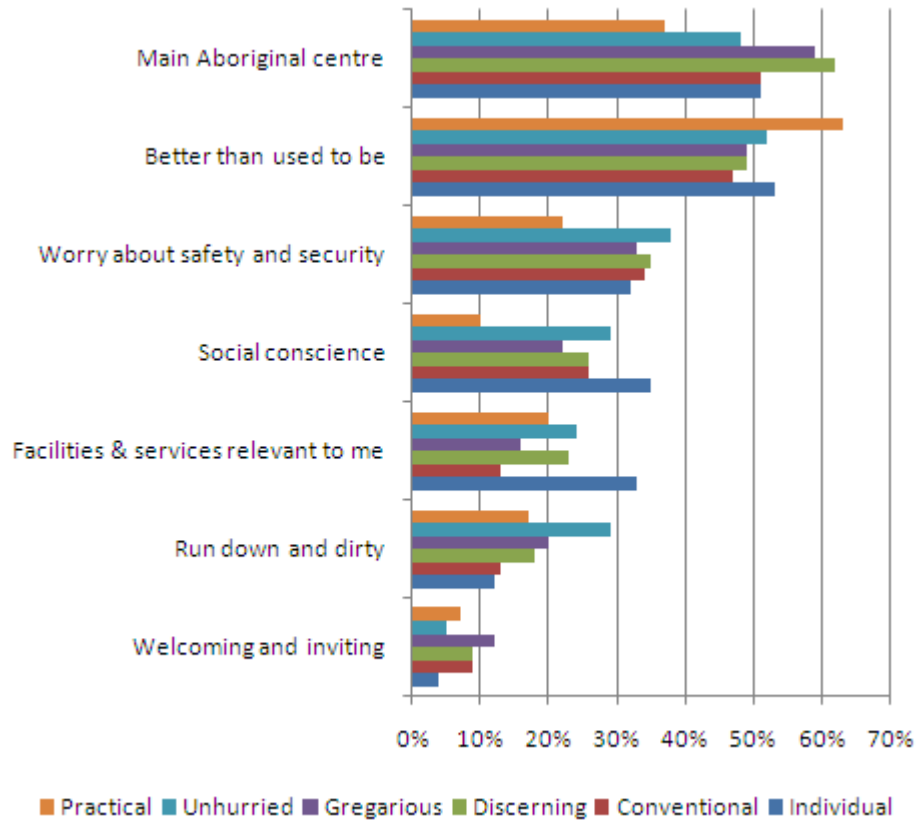
Non-visitors were much more likely to see it as:

- Sydney's main Aboriginal centre
- Run down and dirty
- A place where you worry about safety and security

The following graph shows the differences according to the Leisure Segments.



Table 2. Strongly Agree scores for Leisure Segments



Base: Practical (41); Gregarious (69); Discerning (65); Conventional (47); Unhurried (21); Individual (57). Note that the sample sizes are quite small and the data should be regarded as indicative rather than conclusive.

The following differences are evident.

- The 'Practical' segment was more likely to see the area as better than it used to be and less likely to emphasise the Aboriginal character. They were least likely to see social conscience, but this segment is oriented to concrete reality more than to abstract concepts.
- The 'Unhurried' segment was more likely than others to see the area as run down and dirty.
- The 'Gregarious' segment was more likely to note the Aboriginal character and less likely to see personal relevance in facilities and services.
- The 'Discerning' segment also emphasised the Aboriginal character.
- The 'Conventional' segment was least likely to see personal relevance and they were somewhat less aware of recent improvements.
- The 'Individual' segment was most likely to see personal relevance, and also emphasised the social conscience of the area and recent improvements. They were, however, the least likely to see the area as welcoming and inviting.



Implications for Redfern/Waterloo

The strong perception of improvement is a dynamic quality that can contribute to a strong and positive brand.

The low perception of relevant facilities and services suggests that the brand will need to be supported by a range of strategies that help to build the offer.

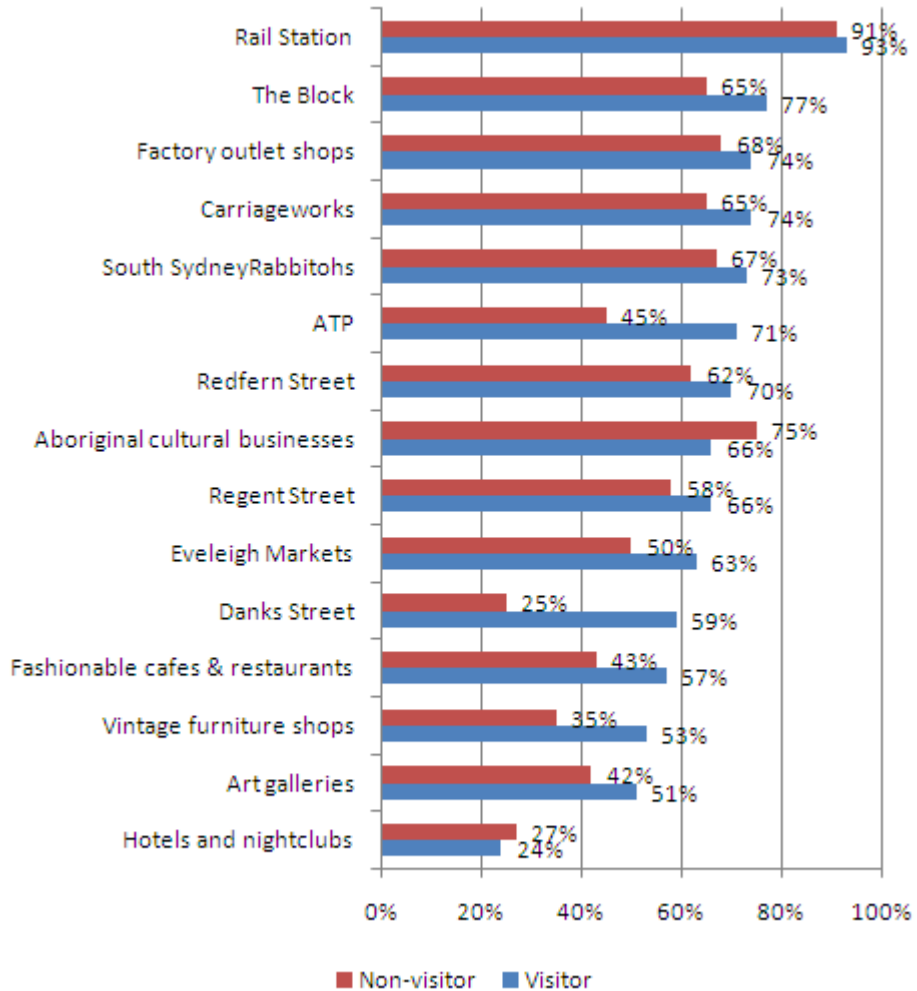
Negative perceptions of safety, run down/dirty and unwelcoming will need strong actions that build experiences to counter these perceptions. Visitors need to see that the area is not run down and dirty, and they need to feel safe and welcome. A brand strategy can only support the experiences offered.



4.2.3 Knowledge of Redfern/Waterloo

To understand the character of a locale, it is important to understand which specific places people associate with it. This survey asked whether or not 15 places were associated with Redfern/Waterloo. The following graph shows the results for visitors and non-visitors.

Fig. 13. Places associated with Redfern/Waterloo



Base = 300

As would be expected by their better knowledge of the area, visitors were much more likely to associate many of the places with Redfern/Waterloo. The only type of place that non-visitors linked more than visitors was ‘Aboriginal cultural businesses’ which is likely to be a halo effect from general awareness of the local Aboriginal community.

The following table summarises comments and implications for brand strategy for the nominated locations.



Table 3. Knowledge of places at Redfern/Waterloo

Place		Comment
Rail Station	92%	Wide awareness of the rail station will support notions of accessibility and convenience. This is an important gateway to the area.
The Block	73%	Wide awareness of the Block will support a character for the area that reflects Indigenous culture. Given the reputation of the Block in the Sydney community, this is also likely to carry some negative associations. Awareness is substantially lower among under-30s.
Carriageworks	71%	It seems that Carriageworks has established a high profile in the relatively short time it has been operating. This awareness and link to Redfern/Waterloo will support an identity of adventurous creativity and willingness to try new things.
Factory outlet shops	72%	Although the number of factory outlet shops in Redfern/Waterloo has declined while those in Alexandria have increased, it seems that the old association with these outlets lives on quite strongly. People under 30 years had much lower awareness of them. They carry connotations of value for money and bargain-hunting.
South Sydney Rabbitohs	71%	The Rabbitoh connection with the area is quite strong, though lower among under-30s. It will carry associations with the underdog, persistence and grass root community support, as well as patronage by the rich and famous.
ATP	62%	Non-visitors were much less likely to connect ATP with Redfern/Waterloo. The size of the site and its distinct purpose and architecture will encourage a distinct sense of place for the site, making it harder for associations to halo onto adjoining areas. Maps show ATP as located in Eveleigh not Redfern or Waterloo.
Redfern Street	67%	Redfern Street was moderately known across all sub-groups.
Regent Street	63%	Regent Street was moderately known, though less by people under 30 years.
Aboriginal cultural businesses	69%	These businesses were quite well known. It is interesting to see that awareness was somewhat higher among non-visitors, perhaps reflecting the halo effect of the local Indigenous community.
Eveleigh Markets	59%	The Markets were better known among visitors and people 30+years. The association of the Markets with Redfern/Waterloo is likely to support notions of authenticity, creativity and contemporary society, as well as values of environmental responsibility and sustainability.
Danks Street	47%	It seems that Danks Street was not widely associated with Redfern/Waterloo. Awareness was especially low among under 30s and non-visitors. The street is likely to contribute an impression of art and cafe society as well as fresh produce, authenticity and ongoing improvement.



Place		Comment
Fashionable cafes & restaurants	52%	Awareness was modest, though higher among women, visitors, and people with children.
Vintage furniture shops	47%	There was modest awareness of vintage furniture shops and this was stronger among visitors to the area and people with children. Perhaps this generation is interested in the period (1950-80s) covered by the shops, and looking for furniture on a budget.
Art galleries	48%	Again, awareness was modest and higher among visitors and people with children.
Hotels and nightclubs	25%	The area was not widely known for hotels and nightclubs. Perceptions were the same across all sub-groups. Redfern Street between the station and George Street is currently zoned for late night trade which could support more hotels or nightclubs.

The following table summarises the best known places and the least known places in Redfern/Waterloo. Current perceptions are likely to be dominated by the best known places, however there are opportunities to build a new perceptions around some of the lesser-known places.

Table 4. Best and least known places

Best known places	Least known places
Rail station	Danks Street
The Block	Fashionable cafes & restaurants
Factory outlet shops	Vintage furniture shops
Carriageworks	Art galleries
South Sydney Rabbitohs	Hotels and nightclubs

Implications for Redfern/Waterloo

As would be expected in an area undergoing social change, awareness shows a mix of the old and the new. It appears that many of the newer places are still not widely established in terms of awareness.

Future perceptions of the area will depend more on the newer venues that are still establishing.



4.2.4 Perceived strengths

Participants were asked to nominate in their own words the good things about Redfern/Waterloo.

In total, 14% had no good things to say about it or felt they didn't know it well enough to comment. A quarter (25%) of people who had not visited could not comment on good things about the area.

The verbatim comments were coded into categories as shown in the following table.

Table 5. Good things about Redfern/Waterloo

Comment	(300)
Good restaurants/cafes/food outlets	32%
Close to city/everything	28%
Good shopping	14%
Better than it used to be/up and coming/evolving	13%
Becoming a residential area/mixed area/gentrified	13%
Station/public transport	12%
Multicultural/diverse/interesting people	12%
Galleries/exhibitions/theatre/Carriageworks	12%
Has been refurbished/upgraded/redeveloped	11%
Factory outlets/clearance stores	9%
Historic architecture/tree lined streets	8%
Village atmosphere/sense of community/good for students/young people	8%
Good parks and open spaces	7%
Vibrant/busy/cosmopolitan	7%
Artists precinct/eclectic/bohemian/funky	7%
Good markets	7%

The dominant perceptions were of cafes and restaurants and convenient location. A wide range of other comments were made, however they tended to be given by small numbers of people. This suggests a rather fragmented character for the area.

The positive characteristics encompassed the following elements:

- practical aspects of proximity and access (transport) and open space
- things to do (theatre, art galleries, cafes, shops and markets)
- qualities of scale (village)



- improvement (upgrades and gentrification)
- character (historic, vibrant, funky).

Implications for Redfern/Waterloo

The prominence of cafes/restaurants and convenient location suggests that the common ground of a positive character for the area is quite narrow and weak. Convenient location is not a reason to go somewhere, instead it is supporting factor that facilitates a visit.

It is worrying that 25% of non-visitors do not know of any good things about the area.

The pervasive sense of an area undergoing change is a potential strength for the development of a hopeful brand strategy.

4.2.5 Drawbacks or limitations

Participants were asked to nominate in their own words the main drawbacks or limitations of the Redfern/Waterloo area.

In total, 8% could mention no drawbacks or limitations. This was the same for visitors and non-visitors and compares with the 14% could not think of good things about the area.

The verbatim comments were coded into categories as shown in the following table.

Table 6. Drawbacks or limitations

Comment	(300)
Not a safe area/crime/violence/dangerous near station	52%
Negative publicity/social stigma/bad reputation	26%
Low rent/public housing/low socioeconomic/social problems	21%
Problems with Aboriginal community	20%
Undesirable people/druggies/alcoholics/unemployed/mentally unwell	12%
Dirty/rundown/grotty/rubbish on streets/graffiti	11%
Traffic problems/congestion	10%
Not enough buses/limited public transport	10%
Limited parking	8%
Drug problems	8%



The main drawbacks related to the sense of safety and to problems related to social disadvantage. Other drawbacks related to traffic and parking problems, limited public transport and rundown/dirty/graffitied streetscapes.

It appears that negative perceptions were stronger and more coherent than perceptions of good things about the area.

Visitors to the area were more aware of traffic and parking limitations, and somewhat less likely to mention safety and security issues.

Safety concerns were expressed more by people under 50 years and the 'Conventional' segment, while problems with the Koori/Aboriginal community were voiced more by people 50+ years.

Implications for Redfern/Waterloo

It is worrying that drawbacks appeared to be more widely known than good things in the area.

It will be important to counter impressions of poor safety and security.

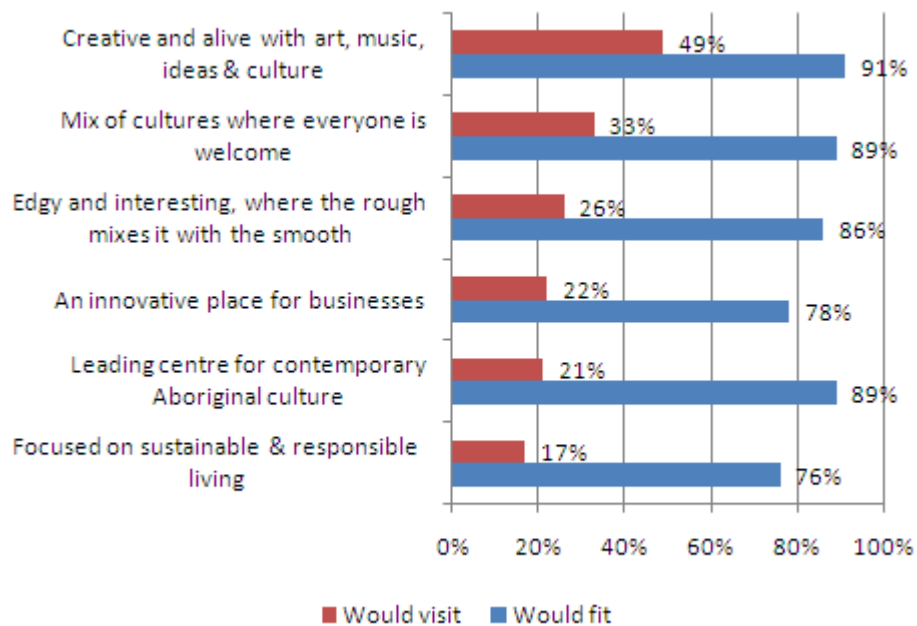


4.3 Future positioning potential

The survey canvassed responses to six positioning statements in connection with the future for Redfern/Waterloo. Participants were asked which positioning statements fitted with Redfern/Waterloo's future place in Sydney. They were also asked to nominate which descriptions would make them most want to visit the area.

The following graph shows the data.

Fig. 14. Positioning fit and visit appeal



Base = 300. Percentages add to more than 100 due to multiple responses.

It is clear that each of the statements was widely considered to fit the future of Redfern/Waterloo, although there was somewhat lower support for “An innovative place for business” and “Focused on sustainable and responsible living”.

There were, however, notable differences in the statements in terms of their potential to generate visits.

The most attractive proposition was “Creative and alive with art, music, ideas and culture” which appealed to 49% of the sample.

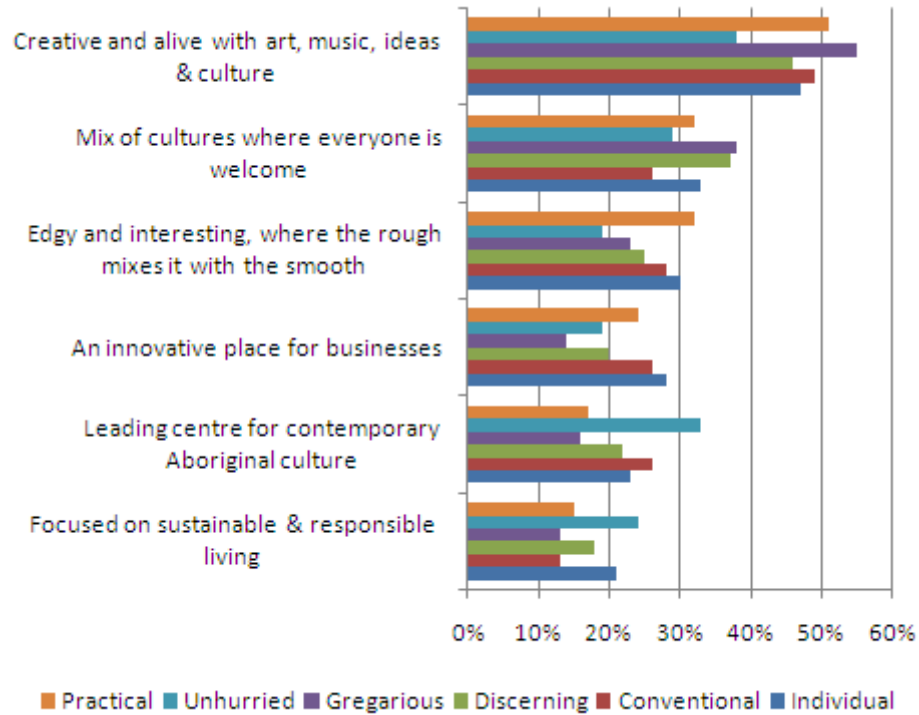
The “Mix of cultures where everyone is welcome” appealed to 33% of the sample.

Other propositions, while interesting, worthy and potentially a good fit for the area, could be regarded more as niche interests.

The following graph shows differences in the visit appeal according to Leisure Segment.



Fig. 15. Visit appeal by Leisure Segment



Base: Practical (41); Gregarious (69); Discerning (65); Conventional (47); Unhurried (21); Individual (57). Note that the sample sizes are quite small and the data should be regarded as indicative rather than conclusive.

Some notable differences are evident.

- The 'Practical' segment is drawn to the 'Creative and alive' place and also to the 'Edgy and interesting'.
- The 'Unhurried' segment is drawn to the 'Centre of Aboriginal culture' and 'Sustainable and responsible living'.
- The 'Gregarious' segment is drawn to the 'Creative and alive' place and the 'Mix of cultures where all are welcome'.
- The 'Discerning' segment is drawn to the 'Creative and alive' place and the 'Mix of cultures where all are welcome'.
- The 'Conventional' segment is less drawn to the 'Mix of cultures where all are welcome' and less to 'Sustainable and responsible living'.
- The 'Individual' segment is drawn to 'Edgy and interesting', an 'Innovative place for business' and 'Sustainable and responsible living'.

Implications for Redfern/Waterloo

While a variety of descriptions are seen to fit well with the future of Redfern/Waterloo, the strongest propositions to attract visitors appear to relate to creative cultural activities and a welcoming mix of cultures.

Current offerings at Carriageworks, Eveleigh and Danks Street can support this positioning. The challenge will be to extend similar activities into heart of Redfern, especially Redfern Street, and to link perceptions of Redfern/Waterloo more strongly to these offerings.



4.3 Visitor profile

This section presents a demographic profile of survey participants.

Table 7. Demographic Profile

	%
Gender	
Male	47%
Female	53%
Age	
Under 25	8%
25 to 29	9%
30-39	20%
40-49	20%
50-59	19%
60-69	14%
70+	9%
Occupation	
Professional	37%
Clerical/admin./sales	15%
Skilled work/trade/unskilled	16%
Retired/pension	17%
Student	3%
Home duties	5%
Looking for work	4%
Language	
English	92%
Chinese	2%
Household	
Lone person	16%
Group/shared	8%
Couple no children	30%
Couple with children	35%
Single parent with children	5%
Other	5%



	%
Household Income	
<\$40,000	18%
\$41,000 to \$70,000	11%
\$71,000 to \$90,000	14%
\$90,000+	42%



Appendix

Environmetrics Leisure Segments

Questionnaire

Tables



Environmetrics Leisure Segments

Psychographic segmentation creates broad categories of users who can be described according to personality characteristics. The segments are derived by statistical analysis of patterns of responses to carefully worded questions.

Environmetrics has used this process to develop the *Environmetrics Leisure Segments* based on:

- leisure behaviour
- demographic characteristics
- stable personality characteristics including:
 - Openness - (inventive / curious vs. consistent / cautious).
 - Conscientiousness - (efficient / organized vs. easy-going / careless).
 - Extraversion - (outgoing / energetic vs. shy / reserved).
 - Agreeableness - (friendly / compassionate vs. competitive / outspoken).
 - Neuroticism - (sensitive / nervous vs. secure / confident).

We have developed an efficient list of questions that capture the personality characteristics, which, along with demographic data and leisure behaviour, form the basis of the Leisure Segments.

The Environmetrics Leisure Segments have been validated in more than 30,000 surveys in Sydney, Victoria and SE Queensland between 1991-2003.

