



Monash Outdoor Dining Research Report

Prepared for Monash City Council

August 2022

J W S R E S E A R C H



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The image features a large, stylized graphic of the letters 'N' and 'W' in a dark blue color. The letters are filled with a satellite-style map of North America, showing landmasses in dark blue and green, and a network of white lines representing roads or infrastructure. The background is white.

Background, objectives and methodology



Research methodology

Quantitative
Telephone survey

n=400 residents of the City of Monash

- Survey quotas on age, gender and location, and weighting applied at the analysis stage to actual age / gender proportions based on ABS census data.
- The maximum margin of error on the total sample of n=400 is +/-4.9% at the 95% confidence level.
- Differences of +/-1% for net scores are due to rounding.
- 6 minutes in length.

n=100 City of Monash traders

- 6 minutes in length.

Conducted 20th July to 10th August 2022

Quantitative
Online opt-in survey

n=394 residents and n=12 City of Monash traders

- Online survey through Shape Monash from 18th July to 24th August 2022.

Please note: Data was collected on opt-in basis; this should be considered when interpreting results.

A large, stylized graphic of the letters 'NW' in a dark blue color. The letters are filled with a glowing, intricate network of white and light blue lines, resembling a fiber optic or neural network. The background of the letters is a dark, textured blue. The graphic is positioned on the right side of the page, partially overlapping the white background.

Executive summary



Community

Utility of parklets

Four in ten residents surveyed by telephone (41%) have used the temporary road-based outdoor dining structures or 'parklets' in Monash activity centres during the past two years. Among online survey respondents, a larger proportion (84%) report using these parklets.



Monash residents consider *'supporting local businesses'* most important in increasing the amenity of the area (88% 'very' or 'somewhat' important),



followed by *'meeting a minimum standard of good quality design'* (79%), and



'increasing vegetation and greenery on the street' (76%).

Among residents who participated in the online survey, contributing to *'activating and revitalising an area'* is seen as the most important (84%) as well as *'supporting local businesses'* (83%).

Preferences for operation

Virtually all residents think businesses should be allowed to apply for outdoor dining permits in activity centres. Just 2% do not think parklets should be permitted.

- A quarter (24%) think permits should only be allowed on a seasonal basis, while fewer think permits should be allowed year-round (12%) or on a short-term basis (8%).

- Close to half (47%) think businesses should be allowed to apply for any of these types of permits.
- Unlike residents surveyed by telephone, a majority (59%) of online survey respondents think outdoor dining permits should be valid year-round.

Half of residents (50%) support repurposing car parking spaces to provide outdoor dining opportunities for hospitality businesses in appropriate areas of activity centres. Two in ten (19%) oppose the idea, and three in ten (31%) are neutral. Support is markedly higher (85%) among residents who participated in the online survey.

More than four in ten residents (43%) think surrounding businesses that are not in hospitality are likely to benefit from enhanced trading areas. Close to a third (29%) think these businesses are unlikely to benefit, and a further three in ten (29%) are not sure.



Among those who participated in the online survey, a majority (55%) think these businesses are likely to benefit, and 19% think they are unlikely to benefit.



Community (cont'd)

Changes to infrastructure



A minority of residents (30%) support permanently replacing parking spaces with extended footpaths for trading activities, as an alternative to more temporary road-based parklets. A higher proportion (43%) oppose this idea.

Contrary to residents surveyed by telephone, three quarters (76%) of online survey respondents support replacing parking spaces with extended footpaths, and just 16% oppose the idea.

A majority of residents (62%) think the cost to extend footpaths should be shared between traders and Council. One in five (22%) think Council should bear all the cost, while 15% think the costs should fall on the traders who benefit. Online survey respondents are most likely to think the cost should be shared between traders and Council (46%), but a sizeable proportion (41%) think Council should bear all the cost.

Residents who support replacing parking spaces with extended footpaths, are *significantly* more likely to consider the following aspects important in increasing the amenity of the local area:

- *'Supporting local businesses'* (94% compared to 88% total).
- *'Providing opportunities for collaboration between businesses'* (83% compared to 70% total).
- *'Contributing to activating and revitalising an area'* (82% compared to 72% total, and 89% compared to 84% total among those who participated in the online survey).



Traders

Utility of parklets

One in four (26%) businesses surveyed by telephone have used a temporary outdoor dining parklet in a Monash activity centre. Among these businesses, a majority (54%) rate it as ‘very successful’. Among those who participated in the online survey, all who used a temporary outdoor dining parklet rate it as very successful.

Most businesses (55%) that did not use a parklet were located near one. Among traders located near a parklet, less than a quarter (22%) found it “good for business” and a similar proportion (24%) found it “bad for business”. However, a majority (54%) saw no difference. Among traders who participated in the online survey, three out of four found being located close to a parklet “bad for business”.



Traders consider *‘supporting local businesses’* most important in increasing the amenity of the local area (91% ‘very’ or ‘somewhat’ important),



followed by *‘meeting a minimum standard of good quality design’* (73%), and



‘providing opportunities for collaboration between businesses’ (68%).

Similarly, traders who participated in the online survey rank supporting local business and good quality design as the most important aspects in increasing amenity.

Preferences for operation

Close to four in ten traders (38%) think all outdoor dining parklet permit options should be available. Fewer than one in ten (6%) do not think parklets should be permitted.

- Almost a quarter (23%) think permits should be valid year-round, and slightly fewer (21%) think permits should be allowed on a seasonal basis.
- Just 12% think permits should be allowed on a short-term temporary basis only.

Among traders who participated in the online survey, year-round permits for outdoor dining parklet is the most preferred option.

Just under half (46%) of traders think that local businesses (aside from those in hospitality) would be likely to benefit from enhanced trading areas, including repurposed parking spaces. Two in ten (22%) think these businesses are unlikely to benefit, and a further three in ten (32%) are not sure.



Just over half of traders who participated in the online survey believe other types of businesses would likely benefit from enhanced trading areas.



Traders (cont'd)

Changes to infrastructure



More than a quarter of traders (27%) support the idea of replacing car parking spaces with extended footpaths for trading activities, as an alternative to more temporary road-based parklets. However, a majority (51%) of traders oppose the idea and 22% are neutral. Unlike traders surveyed by telephone, most online survey respondents support replacing parking spaces with extended footpaths.

Almost half of traders (46%) think Council should bear all the cost of extending footpaths. Slightly fewer (42%) think the costs should be shared between Council and the traders who benefit, while just 12% think it should fall solely on traders.

Half of traders who participated in the online survey think these costs should be shared between that Council and the traders who benefit.

The background of the slide features large, stylized letters 'N' and 'W' in a dark blue color. The letters are filled with a satellite night view of Earth, showing city lights and a network of glowing lines, possibly representing a data network or infrastructure. The 'N' is on the left and the 'W' is on the right, both slanted downwards to the right.

Detailed findings

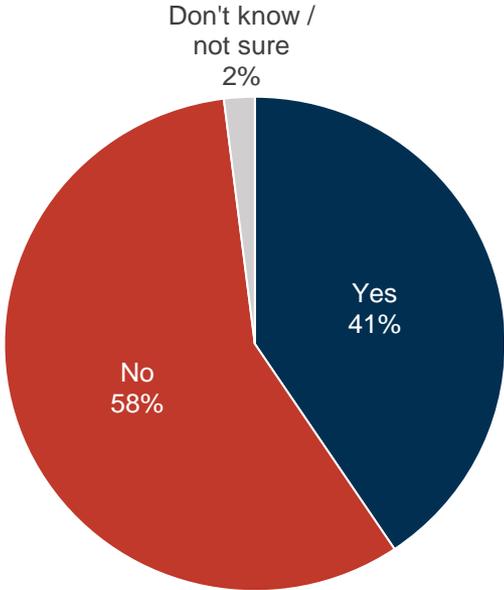


Representative
telephone survey
– Community

Fewer than half of Monash residents have used outdoor dining structures



Usage of road-based outdoor dining structures or parklets

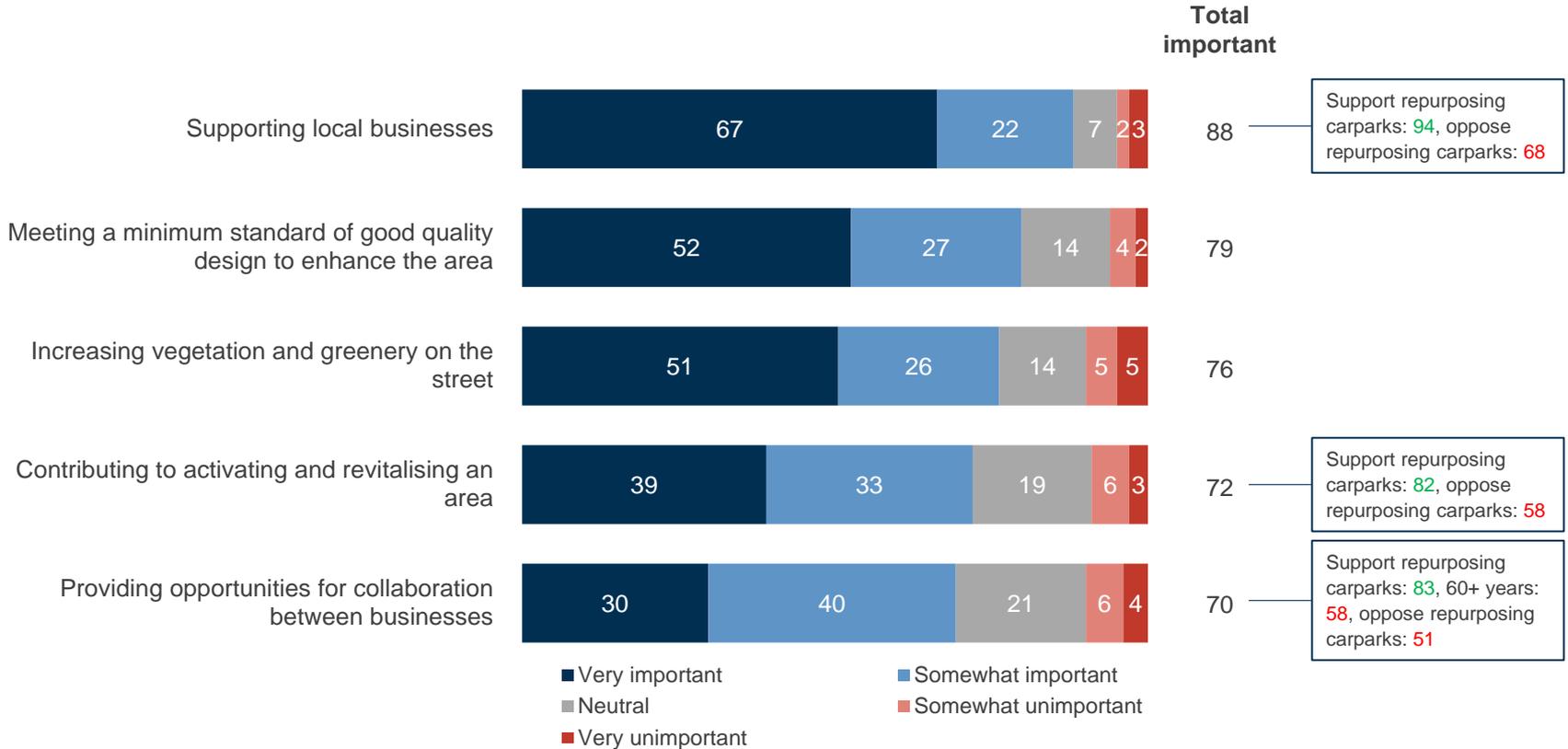


Q1. Did you use the temporary road-based outdoor dining structures or 'parklets' in any of the Monash Activity Centres during the past two years?
Base: All respondents (n=400).

Supporting local business seen to be the most important factor in increasing amenity of the area



Importance of aspects to increasing the amenity of the area (%)

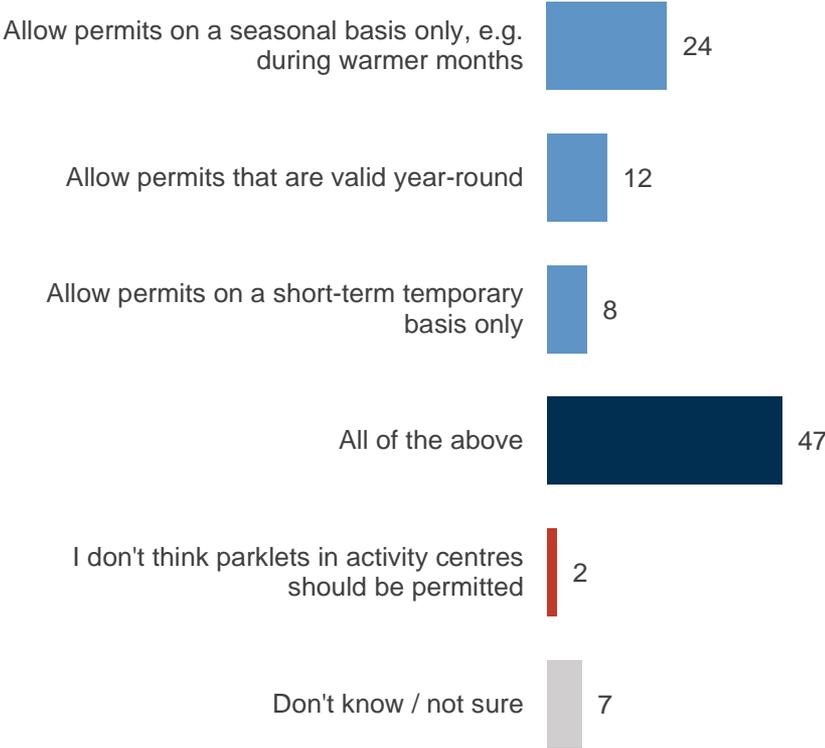


Significantly higher / lower than the total at the 95% confidence interval.
 Q2. If parklets were continued, they would not necessarily look like the temporary structures that were in place for the past 2 years. How important are the following to increasing the amenity of the area?
 Base: All respondents (n=400).

Close to half of residents think all outdoor dining parklet permit options should be available



How outdoor dining in parklets should operate (%)

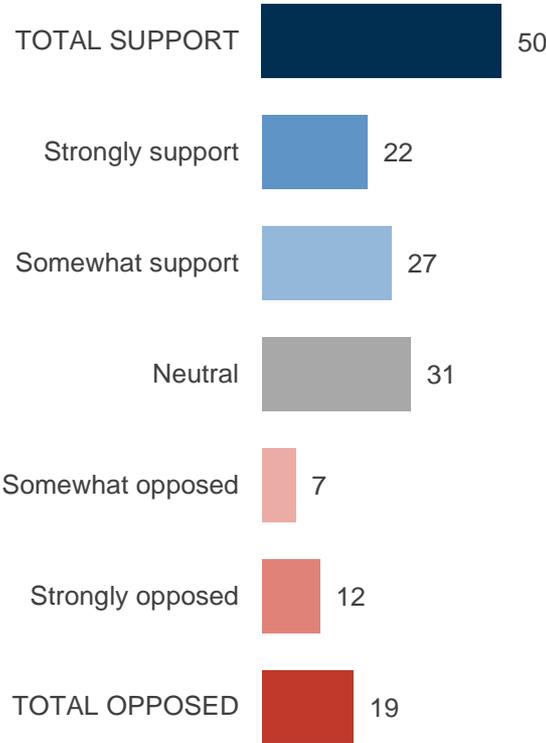


Q3. If outdoor dining in parklets were permitted, how should they operate in our activity centres?
Base: All respondents (n=400).

Half of Monash residents support repurposing of parking spaces



Support for repurposing car parking spaces (%)

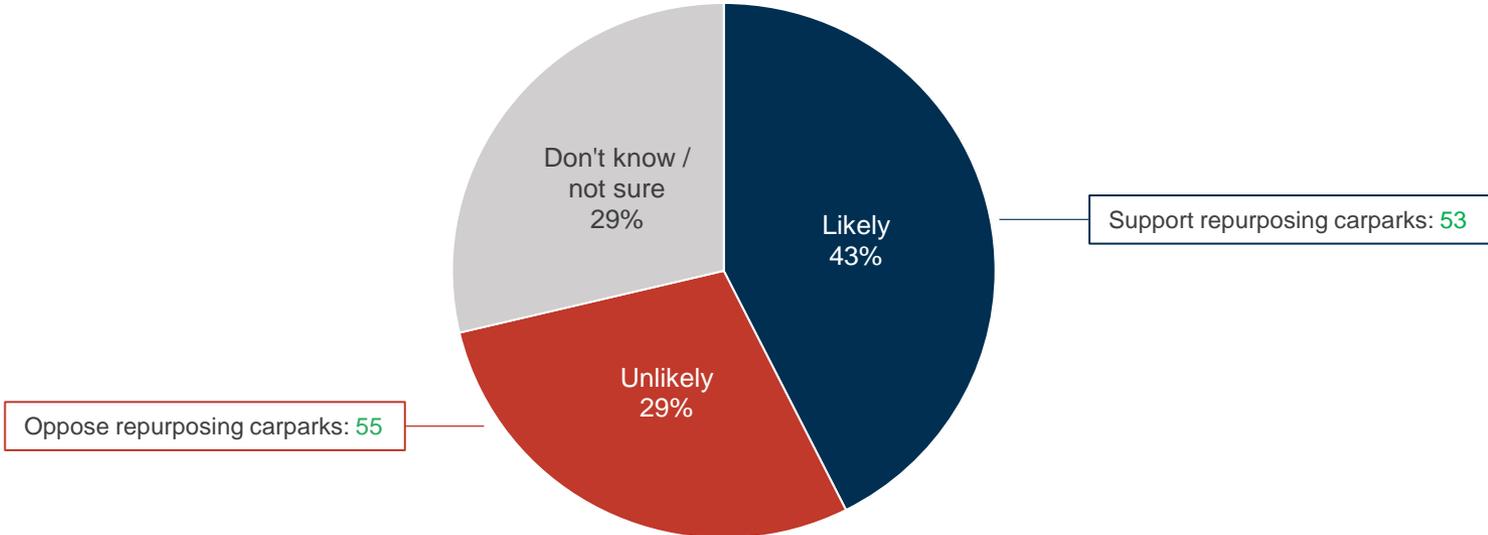


Q4. What is your level of support for repurposing car parking spaces to provide outdoor dining opportunities for hospitality businesses in appropriate areas of activity centres?
Base: All respondents (n=400).

More than four in ten think surrounding businesses are likely to benefit from enhanced trading areas



Likelihood of other businesses benefiting from enhanced trading areas

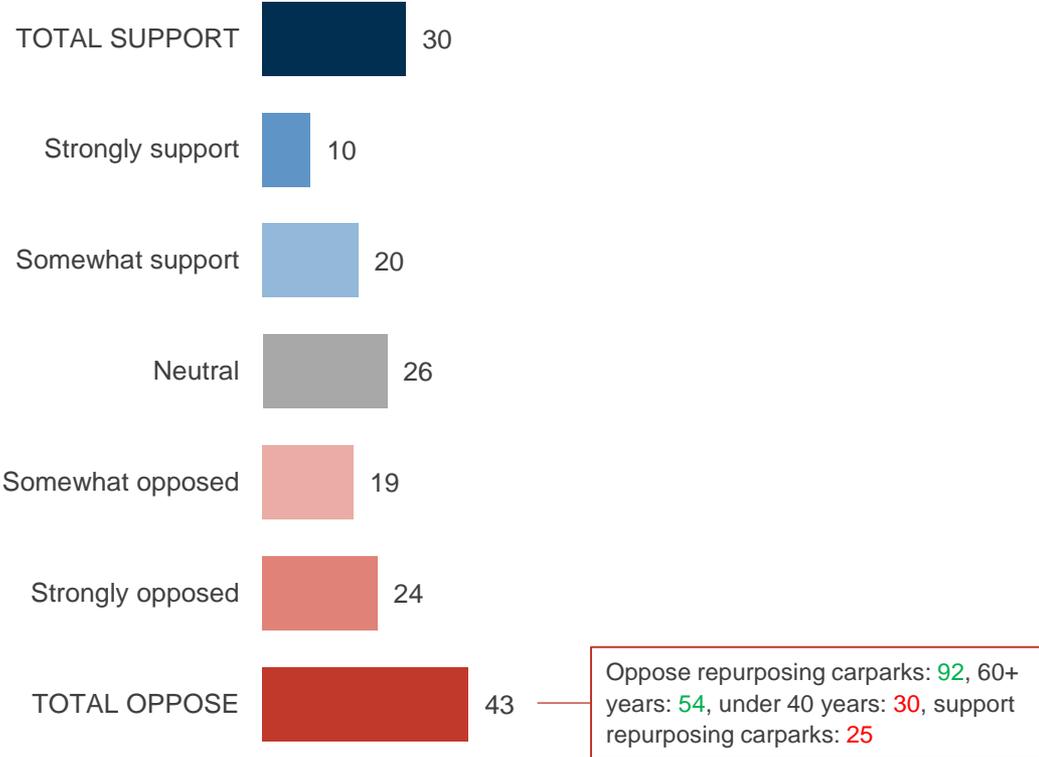


Significantly higher than the total at the 95% confidence interval.
Q5. Setting aside hospitality businesses, would other types of business benefit from enhanced trading areas, including repurposed parking spaces?
Base: All respondents (n=400).

Support for replacing parking spaces with extended footpaths is outweighed by opposition



Support for replacing parking spaces with extended footpaths (%)

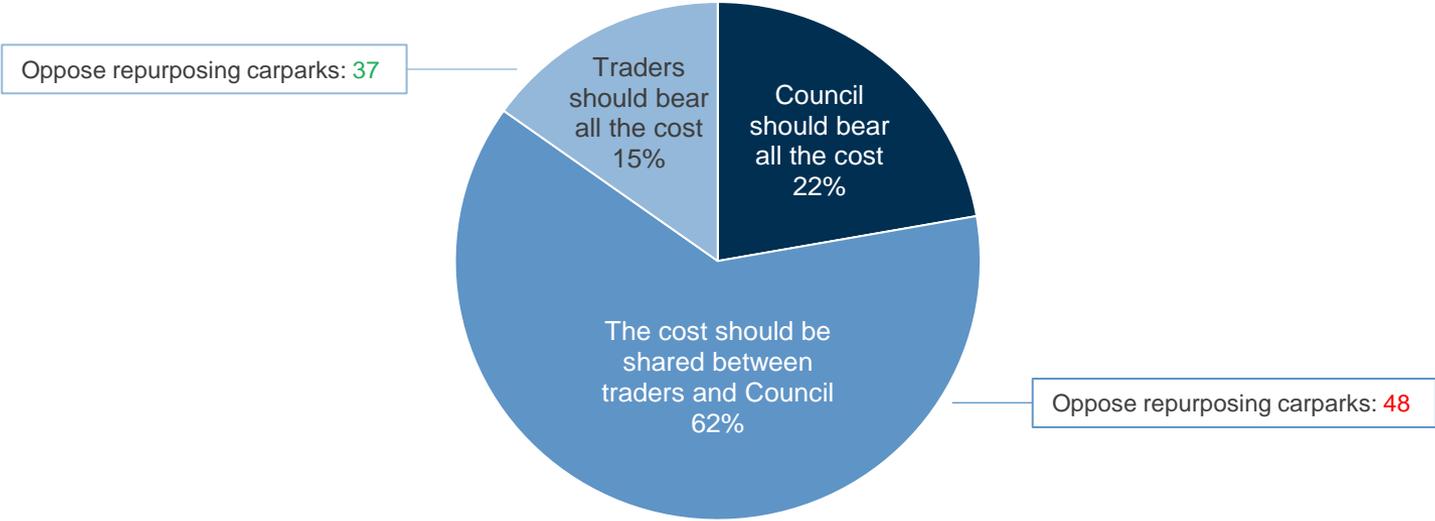


Significantly higher / lower than the total at the 95% confidence interval.
 Q6. An alternative to more temporary road-based parklets would be to reduce parking spaces permanently and extend footpaths. What is your level of support for replacing car parking spaces with extended footpaths for trading activities?
 Base: All respondents (n=400).

Most residents think the cost of extending footpaths should be shared between traders and Council



Who should bear the cost of extending footpaths

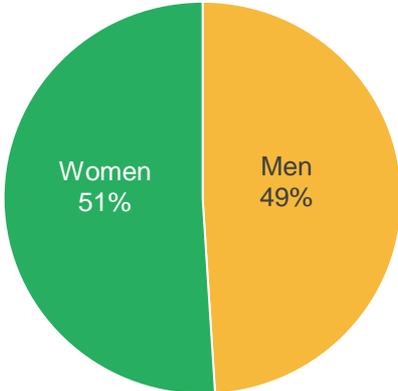


Significantly higher / lower than the total at the 95% confidence interval.
Q7. If footpaths were to be extended to accommodate trading by removing car parking do you think the traders who benefit should bear all or some of the cost?
Base: All respondents (n=400).



Demographics

Gender



Age	%
18-39	41
40-59	28
60+	31

The data set has been weighted to reflect the demographic makeup (by gender, age and location) of the City of Monash.

Q9. Age; Q10. Gender.
Base: All respondents (n=400).

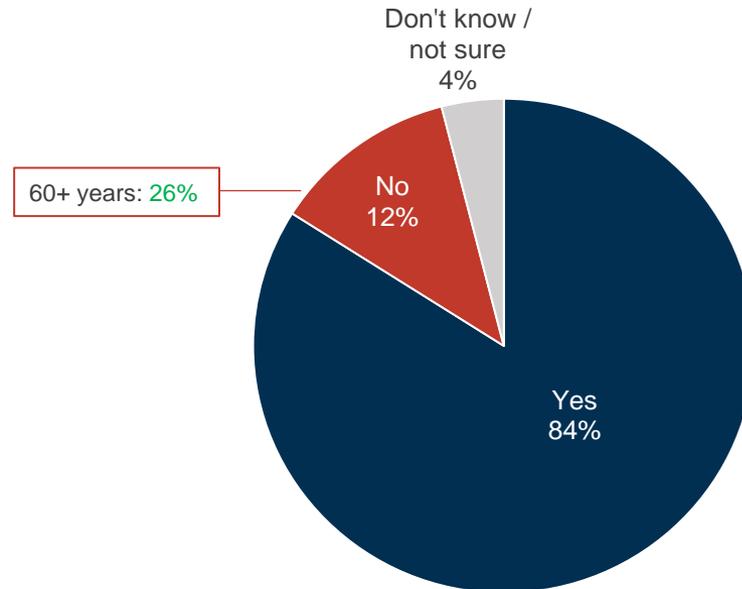


Opt-in online
survey
– Community

Large majority of residents who participated in the online survey have used a road-based outdoor dining structure



Usage of road-based outdoor dining structures or parklets



Significantly **higher** than the total at the 95% confidence interval.

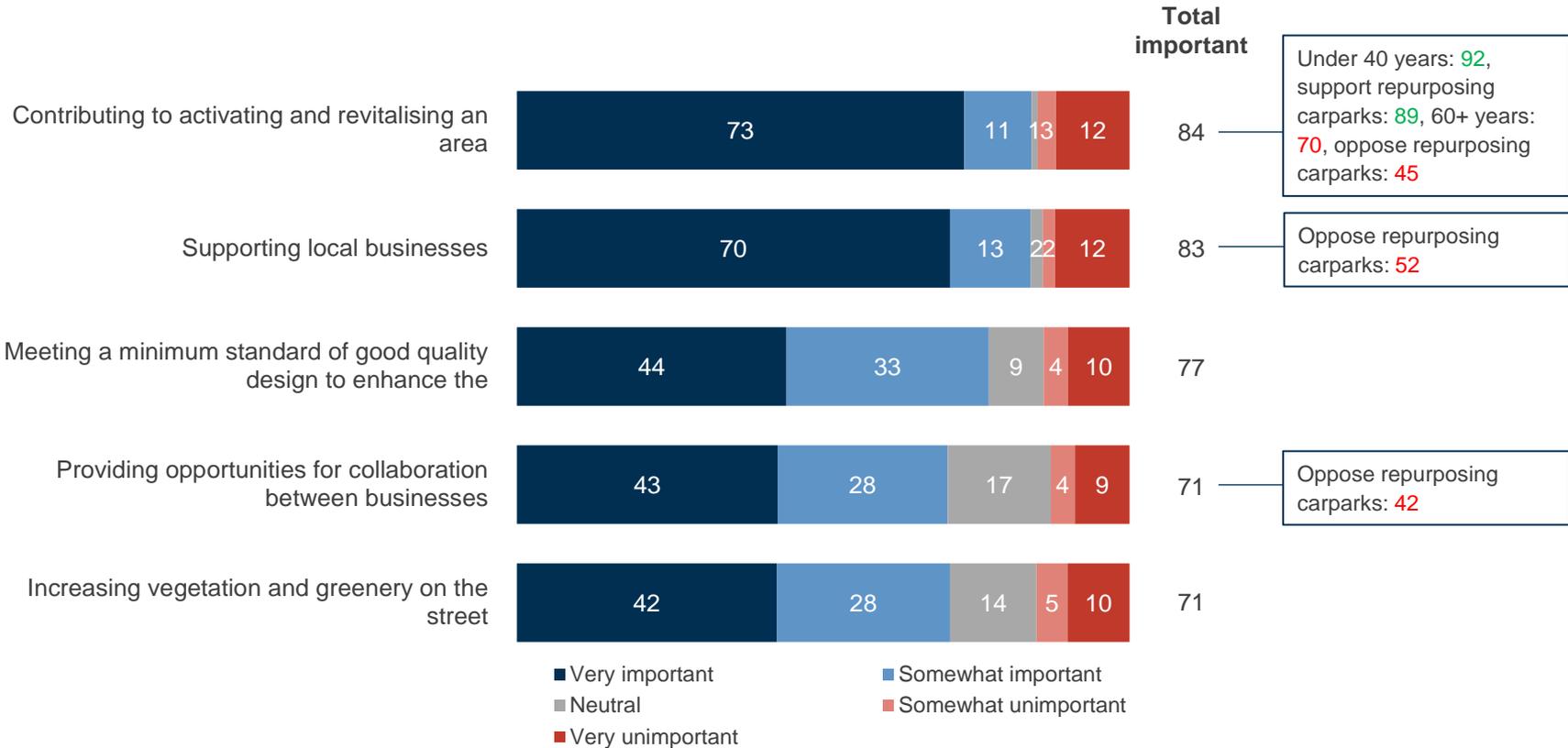
Q1. Did you use the temporary road-based outdoor dining structures or 'parklets' in any of the Monash Activity Centres during the past two years?

Base: All respondents (n=382).

Activating and revitalising the area and supporting local business viewed as most important for increasing amenity



Importance of aspects to increasing the amenity of the area (%)

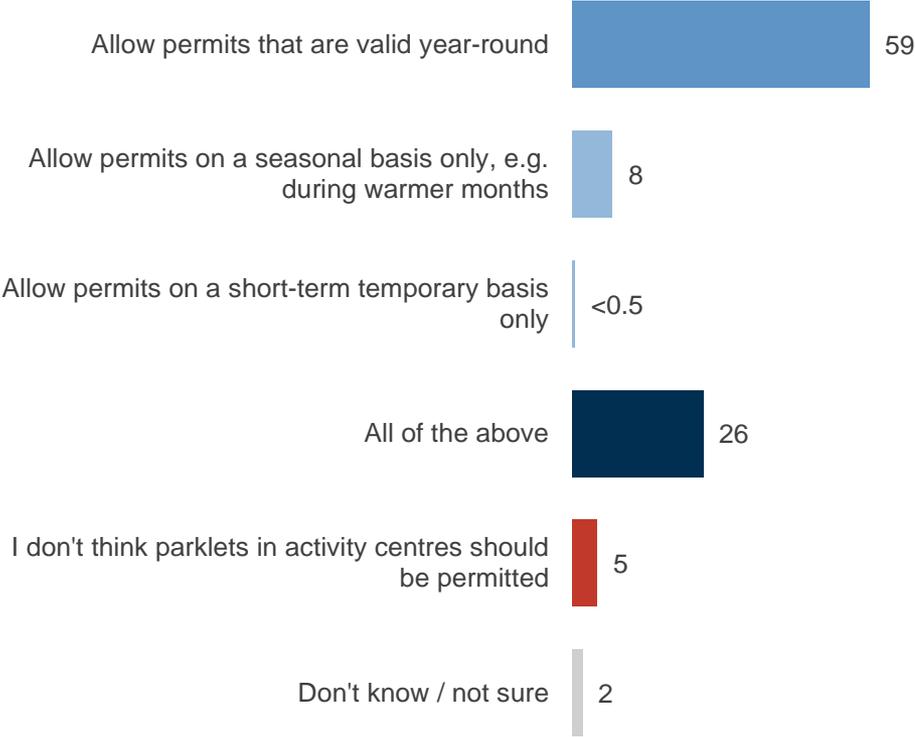


Significantly higher / lower than the total at the 95% confidence interval.
 Q2. If parklets were continued, they would not necessarily look like the temporary structures that were in place for the past 2 years. How important are the following to increasing the amenity of the area?
 Base: All respondents (n=379-382).

Six in ten think Council should allow outdoor dining permits that are valid year-round



How outdoor dining in parklets should operate (%)

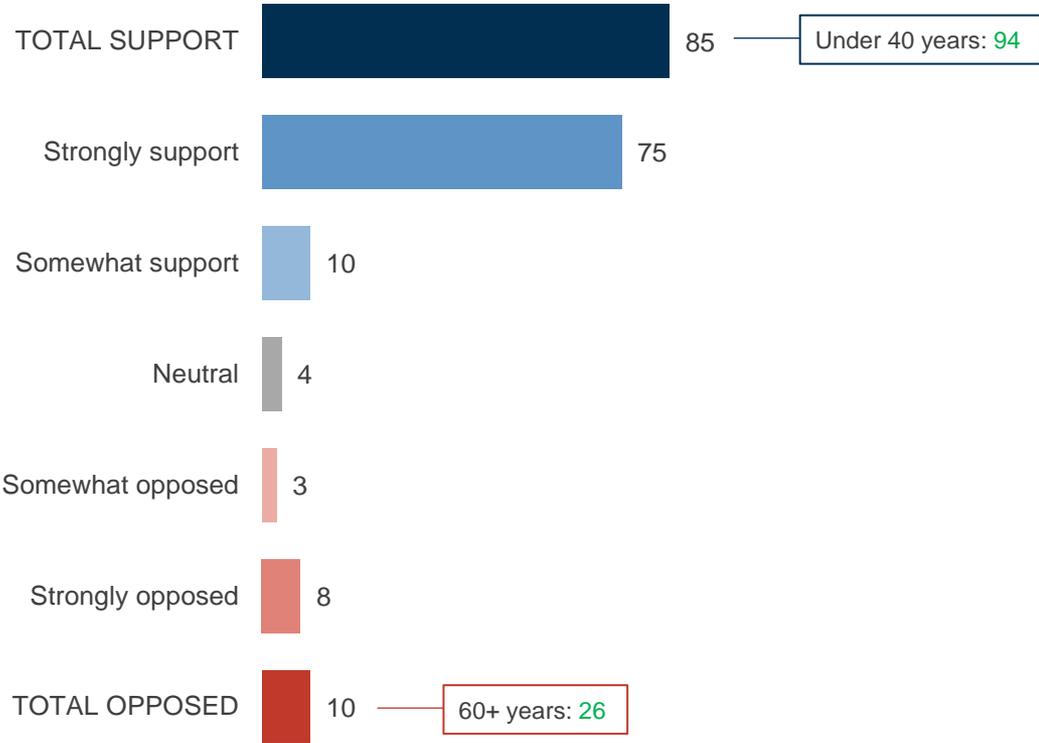


Q3. If outdoor dining in parklets were permitted, how should they operate in our activity centres?
Base: All respondents (n=382).

Vast majority of residents who participated in the online survey support repurposing car parking spaces



Support for repurposing car parking spaces (%)

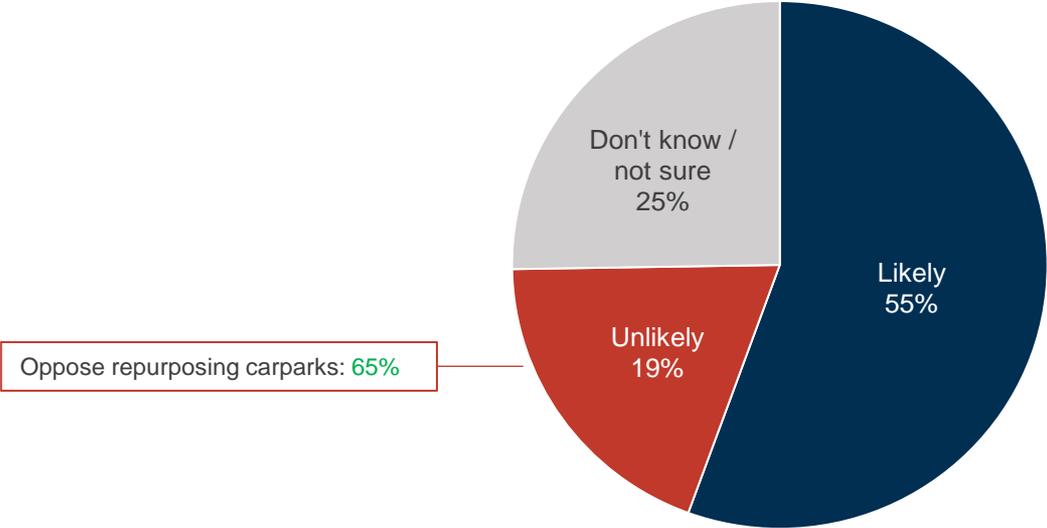


Q4. What is your level of support for repurposing car parking spaces to provide outdoor dining opportunities for hospitality businesses in appropriate areas of activity centres?
Base: All respondents (n=382).

More than half think that other types of business will benefit from enhanced trading areas



Likelihood of other businesses benefiting from enhanced trading areas

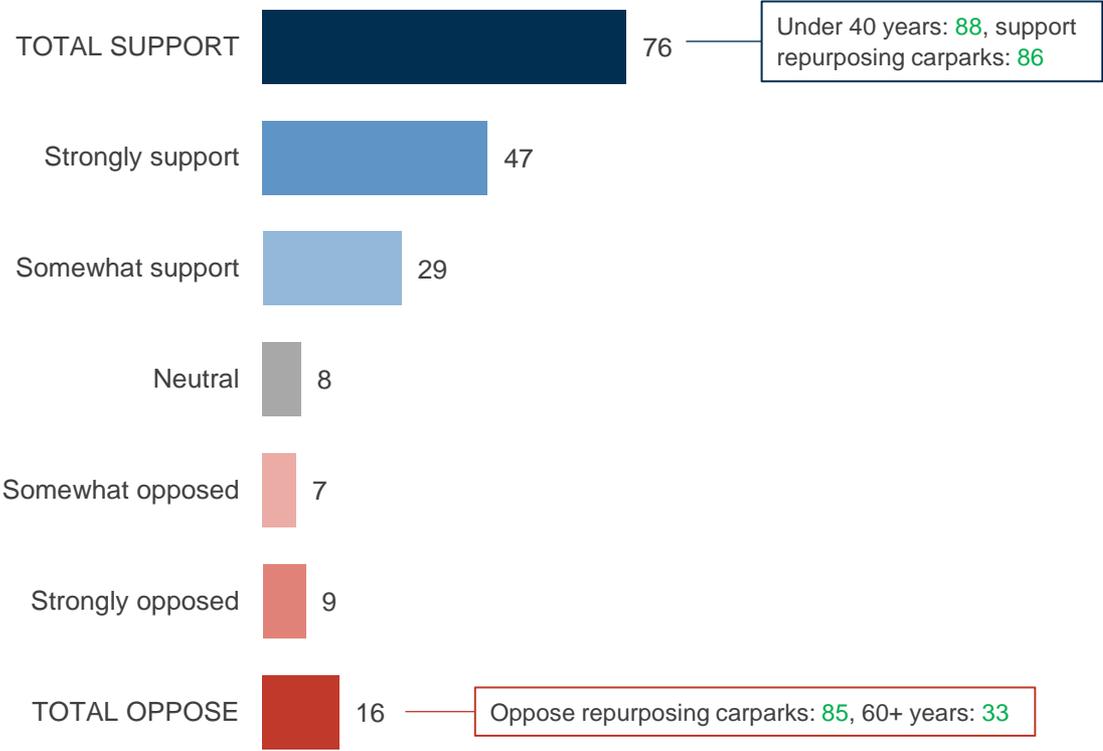


Significantly higher than the total at the 95% confidence interval.
Q5. Setting aside hospitality businesses, would other types of business benefit from enhanced trading areas, including repurposed parking spaces?
Base: All respondents (n=382).

Three in four people who participated in the online survey support replacing parking spaces with extended footpaths



Support for replacing parking spaces with extended footpaths (%)

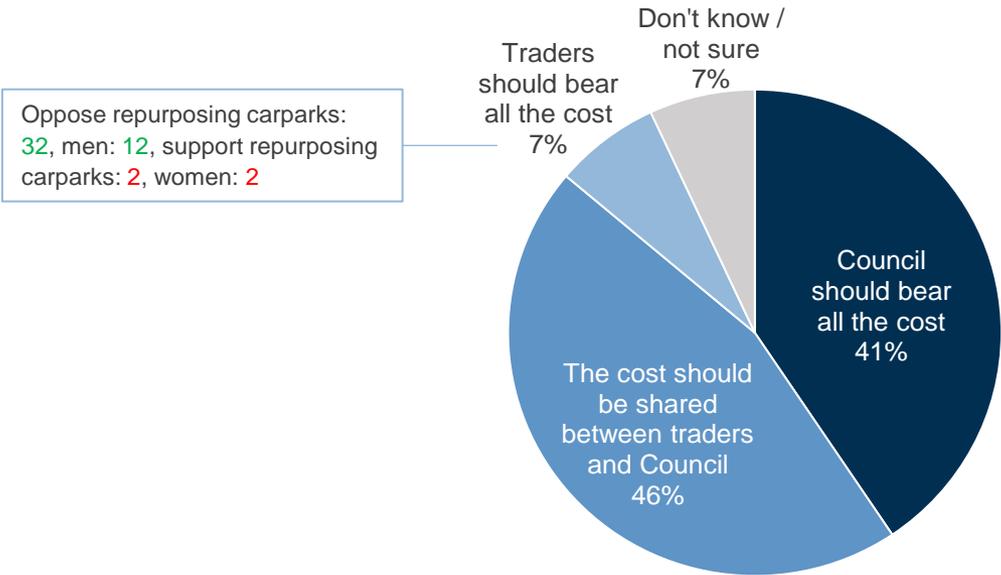


Significantly higher than the total at the 95% confidence interval.
Q6. An alternative to more temporary road-based parklets would be to reduce parking spaces permanently and extend footpaths. What is your level of support for replacing car parking spaces with extended footpaths for trading activities?
Base: All respondents (n=382).

Most think Council should bear at least some of the cost for extending footpaths



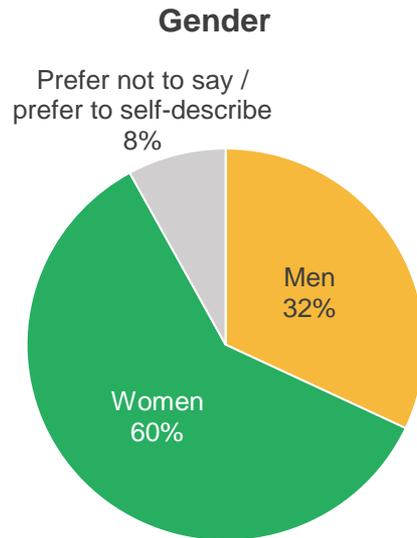
Who should bear the cost of extending footpaths



Significantly higher / lower than the total at the 95% confidence interval.
Q7. If footpaths were to be extended to accommodate trading by removing car parking do you think the traders who benefit should bear all or some of the cost?
Base: All respondents (n=382).



Demographics



Age	%
18-39	36
40-59	47
60+	15
Prefer not to say	3

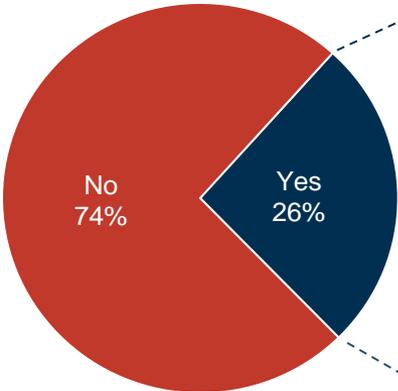


Telephone survey - Traders

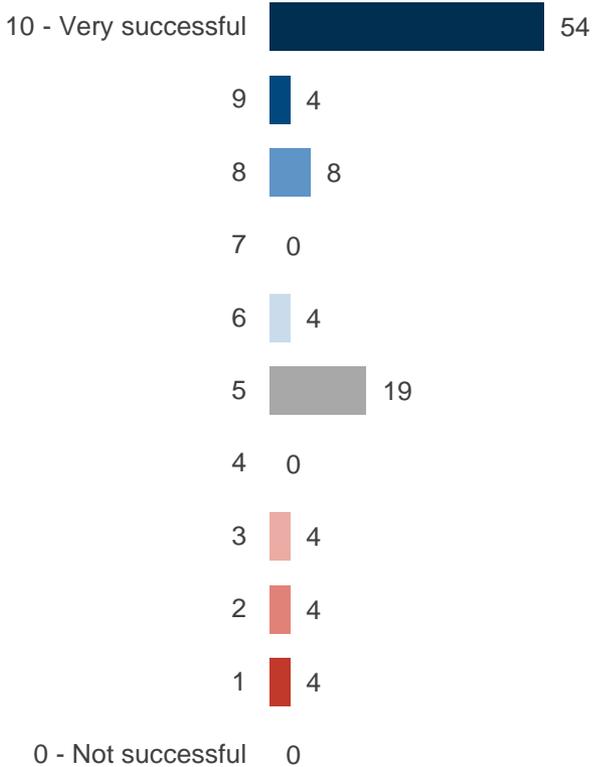
One in four businesses used an outdoor dining parklet in the past 2 years, more than half rate it as very successful



Business used outdoor dining parklet



Success of outdoor dining parklet (%)*

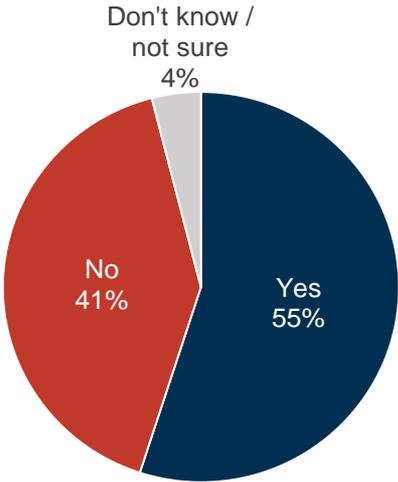


* Caution: Small sample size (n<30).
 Q2. Did your business use an outdoor dining parklet during the past 2 years?; Q2.1. If yes, how would you rate its success?
 Base: All respondents (n=100); business that used outdoor dining (n=26).

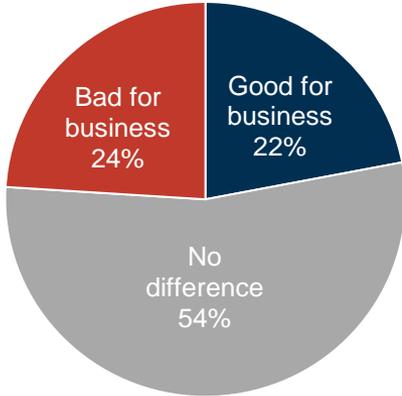
Most businesses that did not use an outdoor dining parklet were located near a parklet, majority saw no impact



Business located near outdoor dining parklet



Impact of proximity to outdoor dining parklet

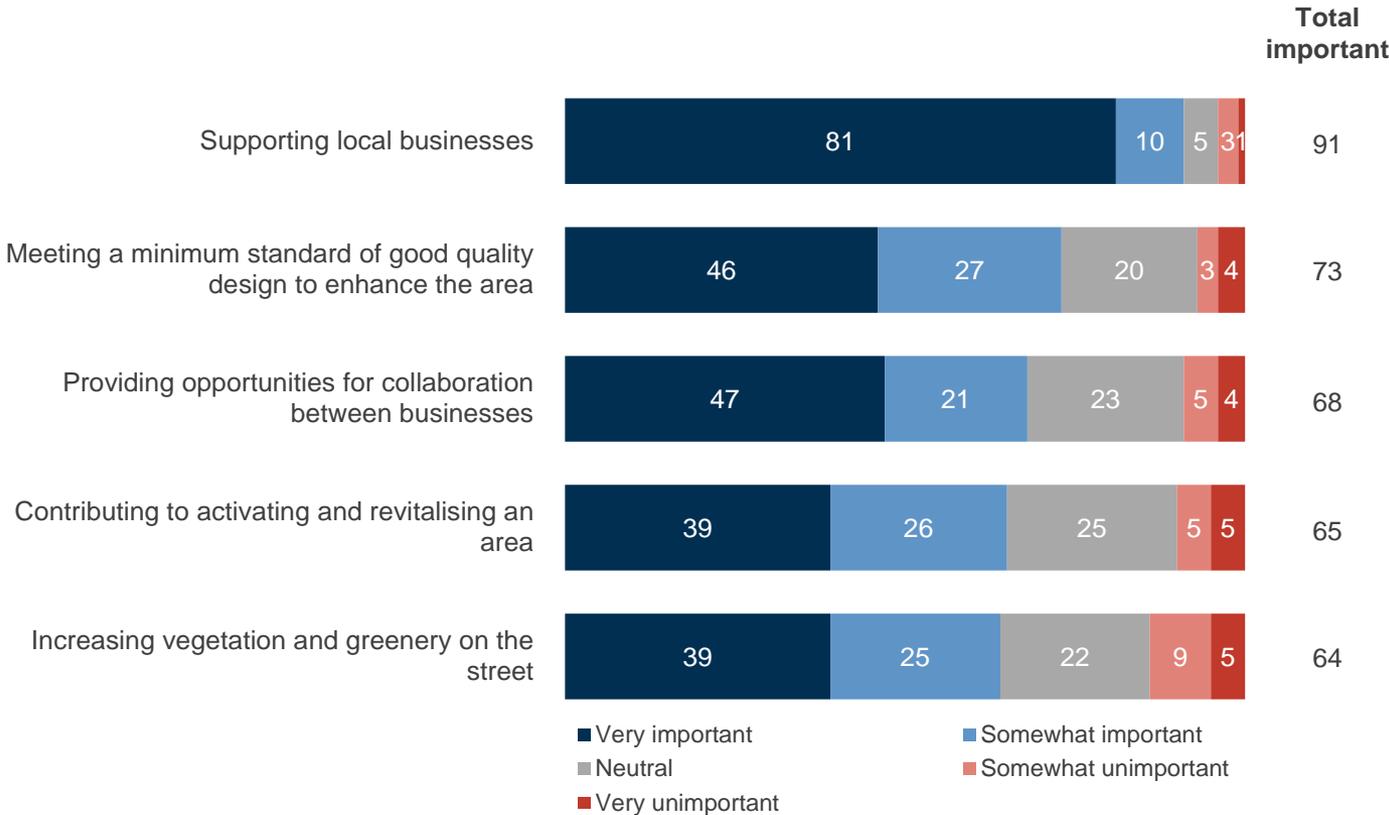


Q2.2. If no, was your business located near a parklet in your area?; Q2.2.1. If yes, what was the impact?
Base: Respondents whose business did not use outdoor dining (n=74); businesses located near a parklet (n=41).

Eight in ten traders believe supporting local business is 'very' important to increasing amenity of the area



Importance of aspects to increasing the amenity of the area (%)

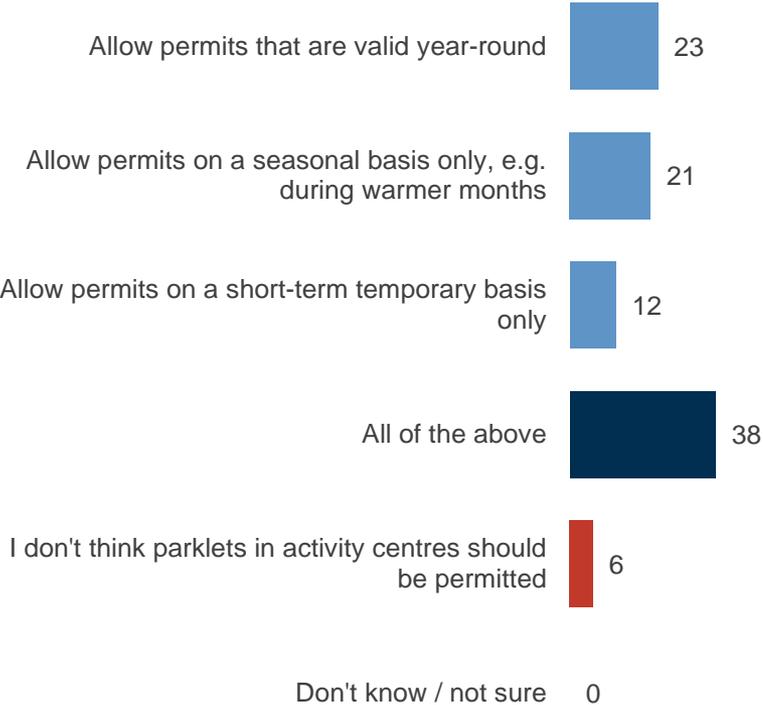


Q3. If parklets were continued, they would not necessarily look like the temporary structures that were in place for the past 2 years. How important are the following to increasing the amenity of the area?
 Base: All respondents (n=100).

Close to four in ten traders think all outdoor dining parklet permit options should be available



Preference of operation permitted in activity areas (%)

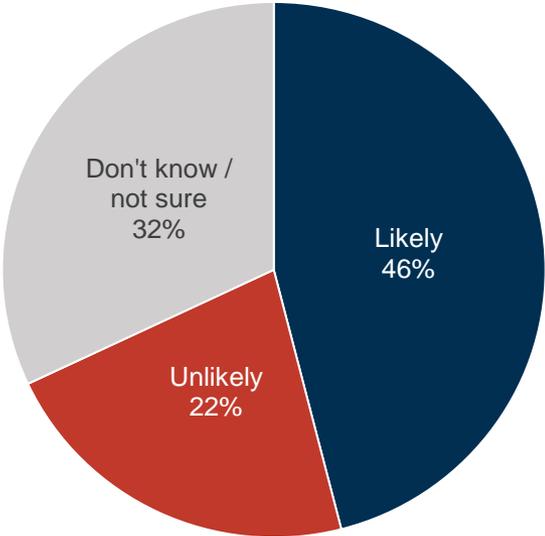


Q4. If outdoor dining in parklets were extended, in general when should they be permitted to operate in our activity centres?
Base: All respondents (n=100).

Almost half of traders think other businesses are likely to benefit from enhanced trading areas



Likelihood of other businesses benefiting from enhanced trading areas

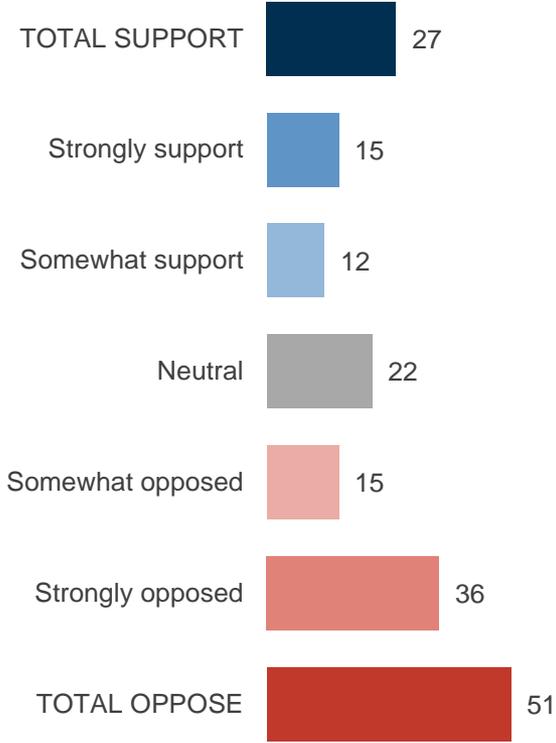


Q5. Setting aside hospitality businesses, would other types of business benefit from enhanced trading areas, including repurposed parking spaces?
Base: All respondents (n=100).

Bare majority of traders oppose replacing parking spaces with extended footpaths for trading activities



Support for replacing parking spaces with extended footpaths (%)

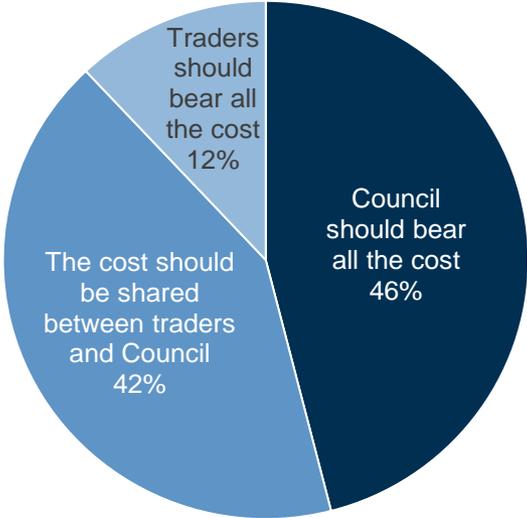


Q6. An alternative to more temporary road-based parklets would be to reduce parking spaces permanently and extend footpaths. What is your level of support for replacing car parking spaces with extended footpaths for trading activities?
Base: All respondents (n=100).

Vast majority of traders think Council should bear all or some of the costs of extending footpaths



Who should bear the cost of extending footpaths



Q7. If footpaths were to be extended to accommodate trading by removing car parking do you think the traders who benefit should bear all or some of the cost?
Base: All respondents (n=100).



Location of business

	%
Glen Waverley	23
Oakleigh	23
Mount Waverley	21
Clayton	11
Pinewood	9
Hughesdale	3
Syndal	2
Other	8

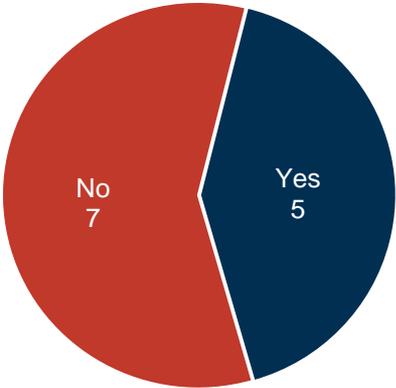


Online survey - Traders

Businesses that made use of an outdoor dining parklet rated them very successful



Business used outdoor dining parklet
(Number of respondents)



Success of outdoor dining parklet *

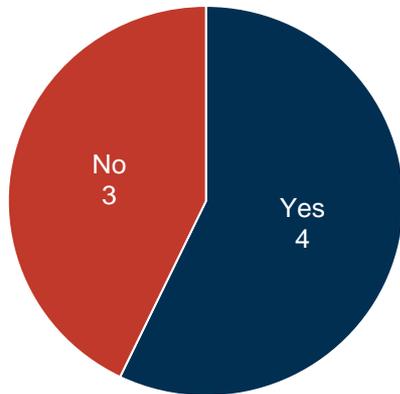
All businesses that used an outdoor dining parklet rated it as '10 – very successful'

Caution: Small sample size (n<30).
Q2. Did your business use an outdoor dining parklet during the past 2 years?; Q2.1. If yes, how would you rate its success?
Base: All respondents (n=12); business that used outdoor dining (n=5).

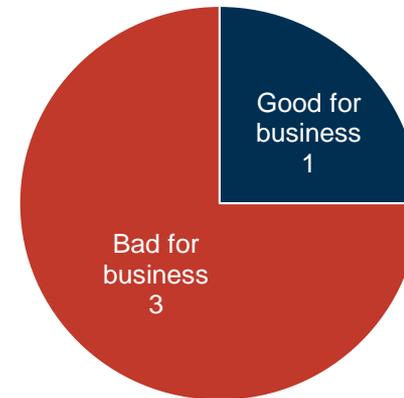
Most traders located close to an outdoor dining parklet feel it was bad for business



Business located near outdoor dining parklet
(Number of respondents)



Impact of proximity to outdoor dining parklet
(Number of respondents)



Caution: Small sample size (n<30).

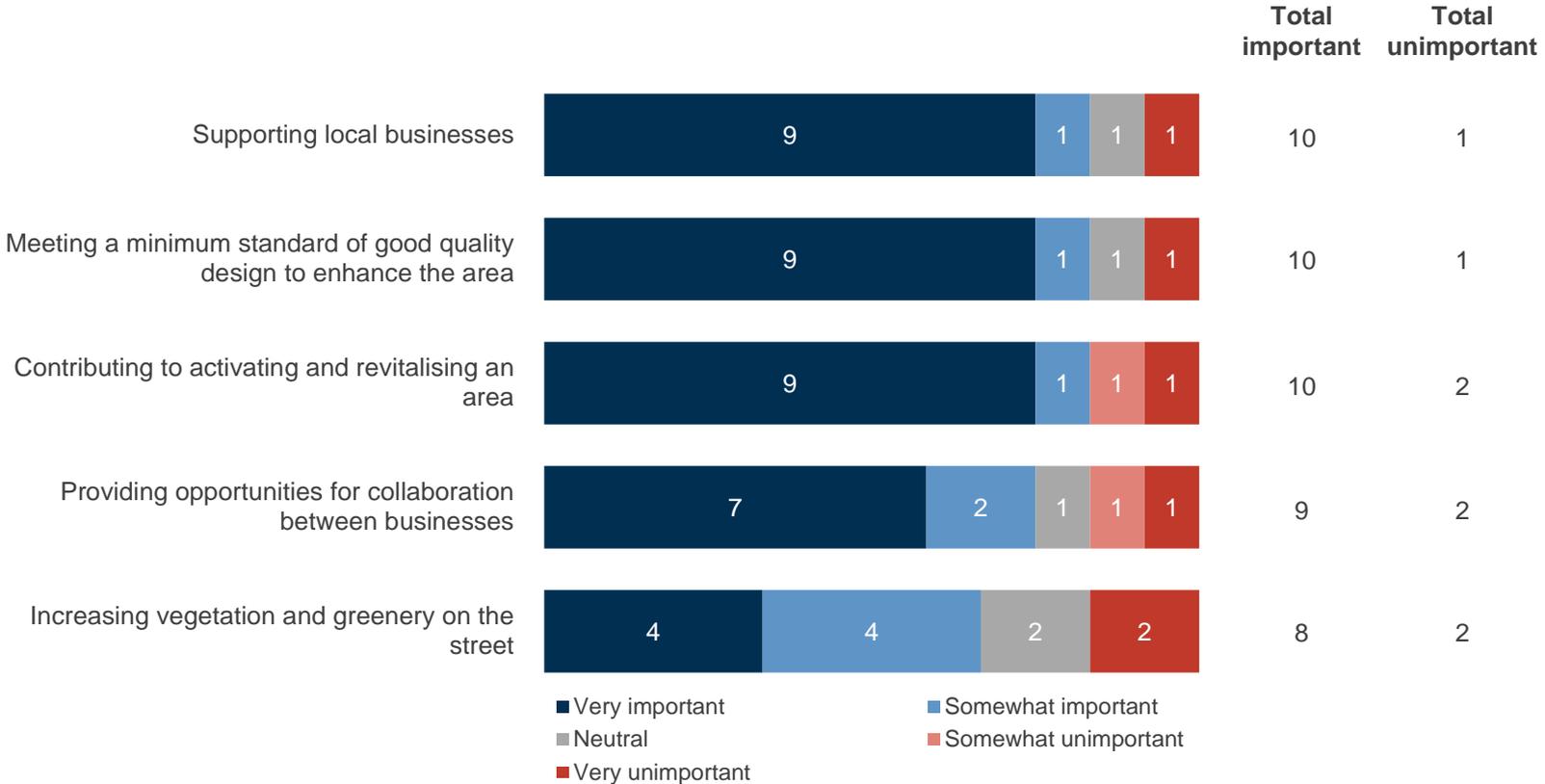
Q2.2. If no, was your business located near a parklet in your area?; Q2.2.1. If yes, what was the impact?

Base: Respondents whose business did not use outdoor dining (n=7); businesses located near a parklet (n=4).

Supporting local businesses and good quality design the most important aspects in increasing amenity of the area



Importance of aspects to increasing the amenity of the area
(Number of respondents)



Caution: Small sample size (n<30).

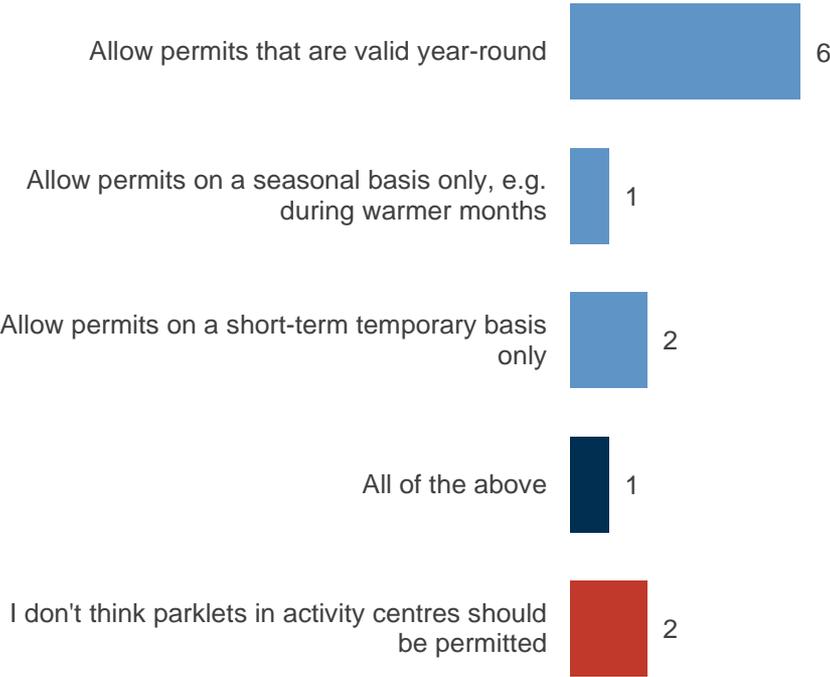
Q3. If parklets were continued, they would not necessarily look like the temporary structures that were in place for the past 2 years. How important are the following to increasing the amenity of the area?

Base: All respondents (n=12).

Year-round permits for outdoor dining parklet is the most preferred option



Preference of operation permitted in activity areas
(Number of respondents)



Caution: Small sample size (n<30).

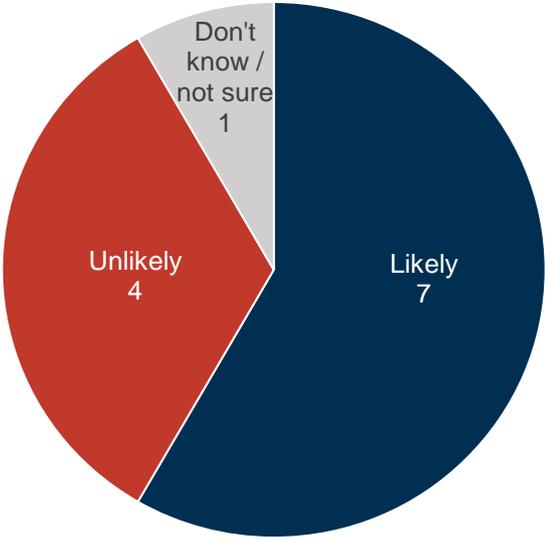
Q4. If outdoor dining in parklets were extended, in general when should they be permitted to operate in our activity centres?

Base: All respondents (n=12).

Just over half of traders believe other types of businesses would likely benefit from enhanced trading areas



Likelihood of other businesses benefiting from enhanced trading areas
(Number of respondents)

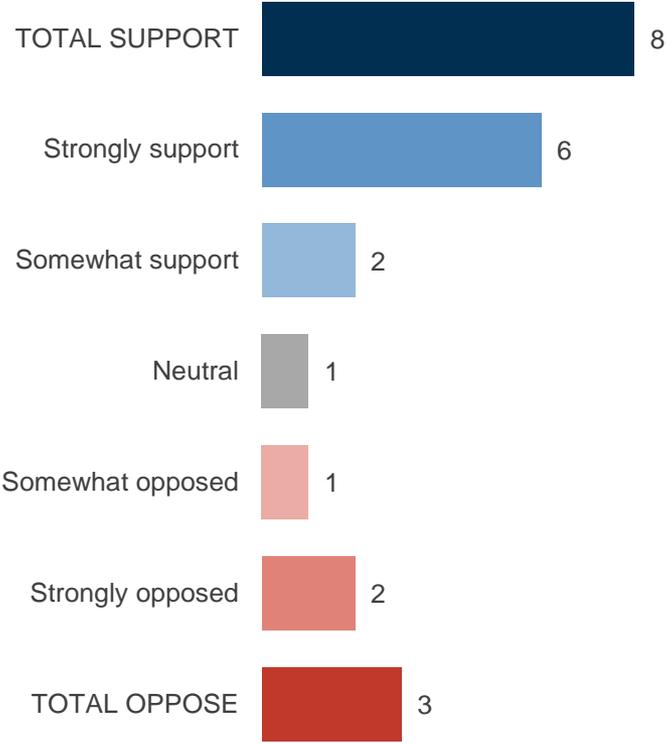


Caution: Small sample size (n<30).
Q5. Setting aside hospitality businesses, would other types of business benefit from enhanced trading areas, including repurposed parking spaces?
Base: All respondents (n=12).

Majority of traders who participated in the online survey support replacing parking spaces with extended footpaths



Support for replacing parking spaces with extended footpaths (Number of respondents)



Caution: Small sample size (n<30).

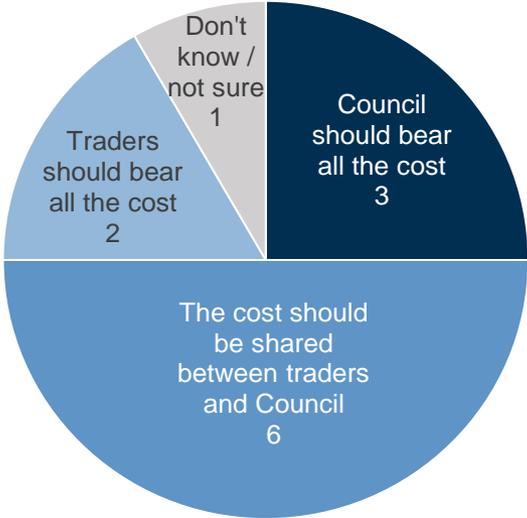
Q6. An alternative to more temporary road-based parklets would be to reduce parking spaces permanently and extend footpaths. What is your level of support for replacing car parking spaces with extended footpaths for trading activities?

Base: All respondents (n=12).

Half who participated in the online survey think Council and traders should share costs of extending footpaths



Who should bear the cost of extending footpaths
(Number of respondents)



Caution: Small sample size (n<30).

Q7. If footpaths were to be extended to accommodate trading by removing car parking do you think the traders who benefit should bear all or some of the cost?

Base: All respondents (n=12).



Location of business

	n=
Clayton	3
Mount Waverley	3
Oakleigh	2
Glen Waverley	2
Hughsdale	1
Pinewood	1

Caution: Small sample size (n<30).

Q1. In which activity centre in Monash do you operate your business?

Base: All respondents (n=12).

THERE ARE
OVER 200,000
PEOPLE IN THE
CITY OF
MONASH...

FIND OUT
WHAT THEY'RE
THINKING.



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Mark Zuker
Managing Director
mzucker@jwsresearch.com

Katrina Cox
Director of Client Services
kcox@jwsresearch.com

Jessica Lai
Research Director
jlai@jwsresearch.com

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