

Higgins
PAPER TABLED
15/02/2017
CLERK: *[Signature]*

ORIGINAL IN
No. 208
Laid down
15/2/17

MCGREGOR **TAN**
RESEARCH. STRATEGY. SOLUTIONS.

Squire Patton Boggs
Proposed Dan Murphy's Store
Darwin Airport

Survey Report

• EXECUTIVE SUMMARY	5	• Need for a large-scale liquor store	20
• ANALYSIS	8	• Expectations and demands	21
• Unprompted awareness of Dan Murphy's	9	• In the public interest	22
• Good or Bad Idea?	10		
• Reasons it is a good idea	11		
• Reasons it is a bad idea	12		
• Should NT have access to a Dan Murphy's?	13		
• Purchased takeaway liquor	14		
• Liquor stores visited	15		
• Main Liquor Store	16		
• Likelihood of visiting	17		
• Offerings	18		

Disclaimer Statement

The material in this report is assembled in good faith and is based on the perceptions of respondents who may have been surveyed. It is made available on the understanding that any views, suggestions or recommendations expressed in this report does not constitute professional advice, and McGregor Tan Research accepts no liability for its use.

COMMERCIAL IN CONFIDENCE

[10678 Squire Patton Boggs - Dan Murphy's Darwin Final Report - December 2016.pptm](#)

Why

- Woolworths Limited required a survey to be completed for the purposes of its application to relocate an existing liquor store licence for a Dan Murphy's store in the grounds of Darwin Airport

When

- Data collection was from the 24th to the 28th November 2017
- This allowed for the target response rate to be achieved

How

- Conducted by telephone
- Survey closed after 400 respondents completed

Who

- Good cross section of residents was interviewed within a 5km radius of the proposed store

GUIDE TO READING THE REPORT

The core report is typically analysed in order of the questions asked in the survey. Relevant statistically significant findings as well as other observations of interest are analysed in this report.

Please note that, because of rounding, answers in single response questions will not always sum precisely to 100%.

In addition, as the base for percentages is the number of respondents answering a particular question (rather than the number of responses) multiple response questions sum to more than 100%.

EXECUTIVE SUMMARY

Unprompted awareness of the Dan Murphy chain was very high and stood at 88%.

More than two thirds (69%) of those surveyed considered the proposed Dan Murphy's store to be a good idea, while 22% believed it to be a bad idea. A further 10% were undecided.

The main reasons given by respondents who considered the proposed Dan Murphy's store to be a good idea (n=274) were:

- Better range / more choice (62%)
- Increased / more competition (44%)
- Better prices / saves money (41%)

While the main reasons for those who believed the proposed Dan Murphy's store to be a bad idea (n=87) were:

- Social problems / encourages excessive consumption (67%)
- Enough here already (67%)

The majority (76%) indicated the Northern Territory should also have access to a Dan Murphy store, with less than one quarter (24%) disagreeing.

Most of (85%) the respondents stated they have purchased takeaway liquor in the past 6 months, with just 15% indicating they had not.

The stores most frequently visited by respondents who had purchased take away liquor (n=339) in the last 6 months included:

- BWS Nightcliff (45%)
- BWS Airport Tavern Drive In (24%)
- Coles Liquorland, Casuarina (19%)

Top responses given by respondents who had purchased take away liquor (n=339) in the last 6 months when asked what their main store was were:

- BWS Nightcliff (23%)
- BWS, Hibiscus Shopping Centre, Leanyer (9%)
- Coles Liquorland, Casuarina (9%)

Total likelihood of purchasing takeaway liquor from the proposed Dan Murphy's store if it opens stood at 62% of all respondents. This was higher amongst those who had purchased takeaway liquor (n=339) in the last 6 months (69%).

Of this group 2 in 5 (41%) indicated they would be extremely likely to purchase takeaway liquor from the proposed Dan Murphy's store if it opens. This was higher amongst those who had purchased takeaway liquor (n=339) in the last 6 months (47%).

Better range / more choice (64%) and better prices / saves money (38%) were the main responses respondents believed Dan Murphy could offer its customers that they do not currently have available at their main liquor store.

More than 3 in 5 (61%) respondents agreed a large-scale liquor store was needed in the Northern Territory, while 40% disagreed. There was higher level of agreement amongst those who had purchased takeaway liquor (n=339) in the last 6 months (66%).

Most of those surveyed (71%) agreed the proposed Dan Murphy's liquor store will enable the liquor industry in the Northern Territory to develop in line with contemporary community aspirations, expectations and demands for a greater range of products prices etc., while 29% disagreed. There was higher level of agreement amongst those who had purchased takeaway liquor (n=339) in the last 6 months (76%).

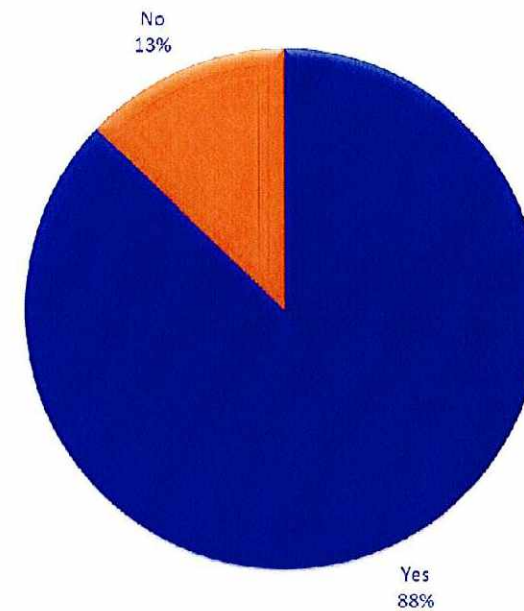
3 in 5 (59%) of all respondents agreed the proposed Dan Murphy's store was in the public's interest, while (42%) disagreed. There was higher level of agreement amongst those who had purchased takeaway liquor (n=339) in the last 6 months(64%).

ANALYSIS

Unprompted awareness of Dan Murphy's

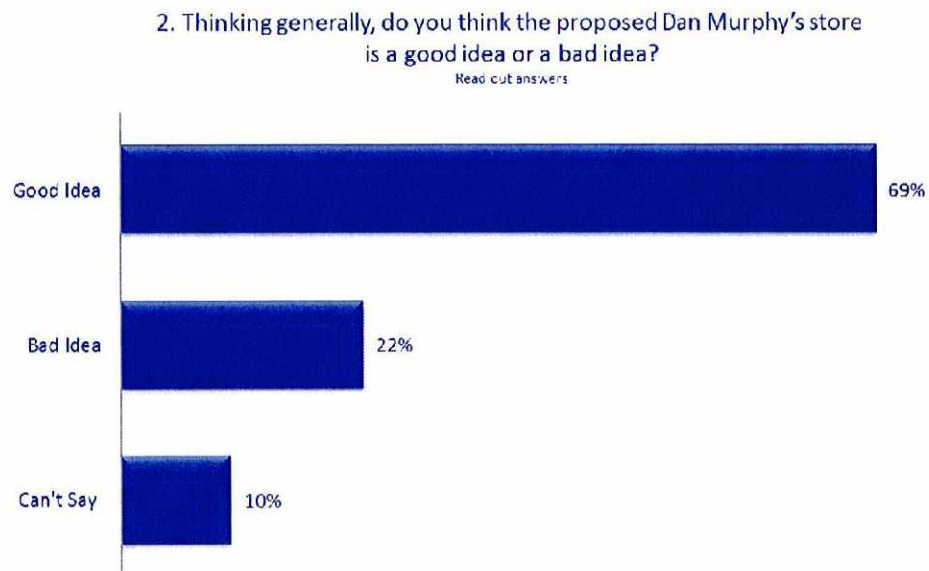
Even though Dan Murphy's do not have a store in the Northern Territory, unprompted awareness of the chain was very high (88%).

1. Have you heard of 'Dan Murphy's' liquor stores?



Good or Bad Idea?

Most of those surveyed considered the proposed Dan Murphy's store to be a **good idea** (69%), however approximately 1 in 5 considered it to be a **bad idea** (22%). A further 10% were undecided.



Reasons it is a good idea

Better range / more choice (62%) was the main reason given by respondents who considered the proposed Dan Murphy's store to be a good idea (n=274), while other reasons included:

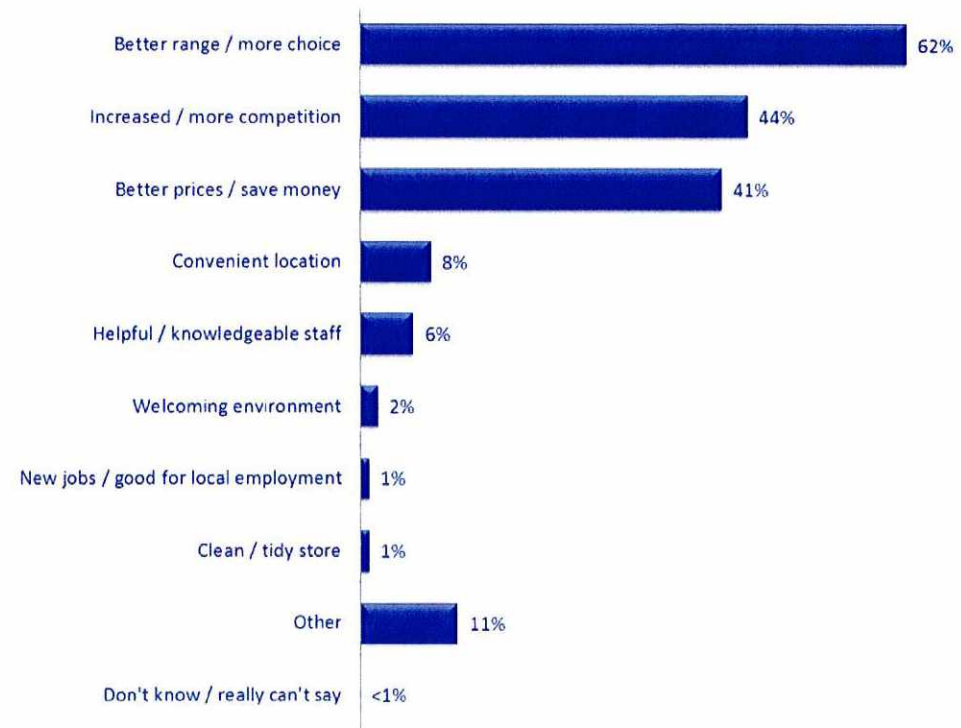
- Increased / more competition (44%)
- Better prices / saves money (41%)

Respondents who indicated they would be *likely to purchase takeaway liquor* from Dan Murphy's had a higher incidence of naming better range / more choice (68%) and better prices / saves money (48%).

3. Why do you think it is a good idea?

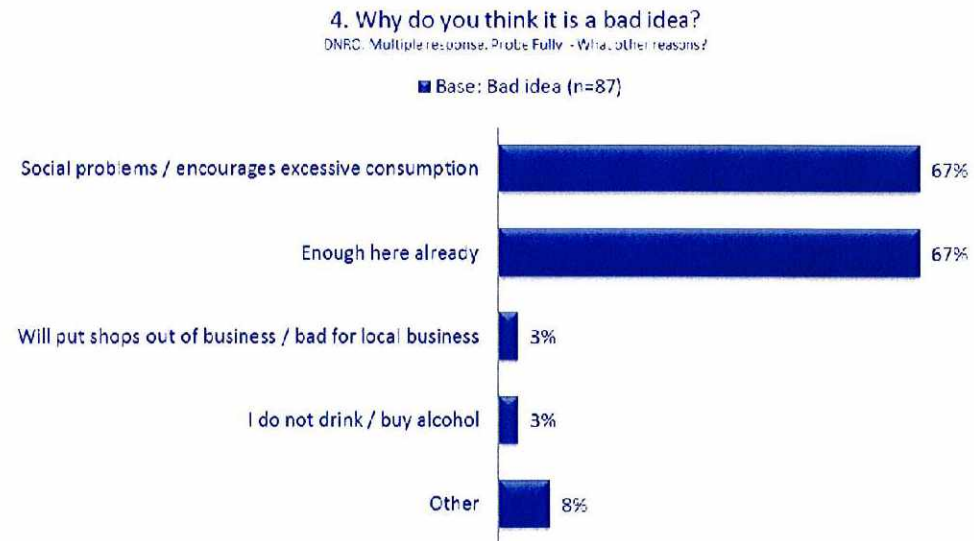
DNRO. Multiple response, Probe Fully - What other reasons?

■ Base: Good idea (n=274)



Reasons it is a bad idea

Those who believed the proposed Dan Murphy's store to be a **bad idea** (n=87), cited social problems / encourages excessive consumption (67%) and enough here already (67%) and as the main reasons.



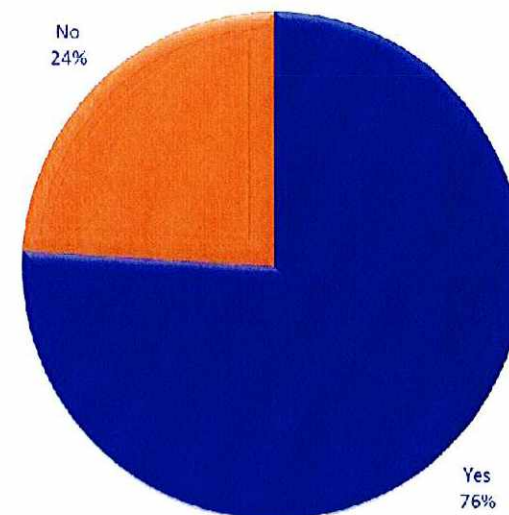
Should NT have access to a Dan Murphy's?

Most (76%) of those surveyed believed that the Northern Territory should also have access to a Dan Murphy store, with 1 in 5 (24%) disagreeing.

There was a higher incidence of the following groups agreeing they should have access:

- Those who believed the proposed store to be a *good idea* (97%)
- Those *likely to purchase takeaway liquor* (96%)
- Respondents who *have purchased takeaway liquor in the past 6 months* (81%)
- Respondents who believe there is a *need for a large-scale liquor store* in the Northern Territory (100%)
- Those who believe the proposed Dan Murphy store is in *the public's best interest* (99%)

5. There are 212 Dan Murphy's stores throughout Australia with the Northern Territory being the only State or Territory not to have one.
Do you believe that the Northern Territory should also have access to a Dan Murphy's store?



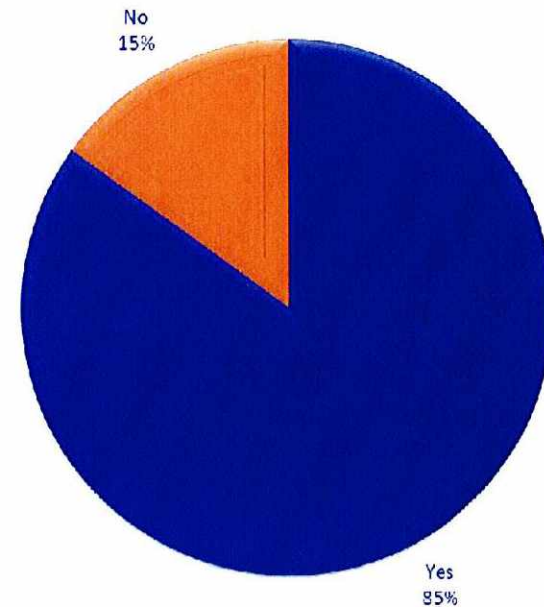
Purchased takeaway liquor

Over 4 in 5 (85%) respondents stated they have purchased takeaway liquor in the past 6 months, with just 15% indicating they had not.

The following groups of respondents had a higher incidence of having purchased liquor in the past 6 months:

- Those who indicated they were *likely to purchase takeaway liquor* (97%)
- Respondents who believe the Northern Territory *should have access to a Dan Murphy store* (90%)
- Respondents who believe there is *a need for a large-scale liquor store* in the Northern Territory (93%)
- Those who believe the proposed Dan Murphy store is in the *public's best interest* (92%)

6. Have you purchased any takeaway liquor, for instance beer, wine or spirits in the past 6 months?



Liquor stores visited

Nearly half (45%) of respondents who had purchased take away liquor (n=339) in the last 6 months had visited the BWS Nightcliff store, while other stores visited included:

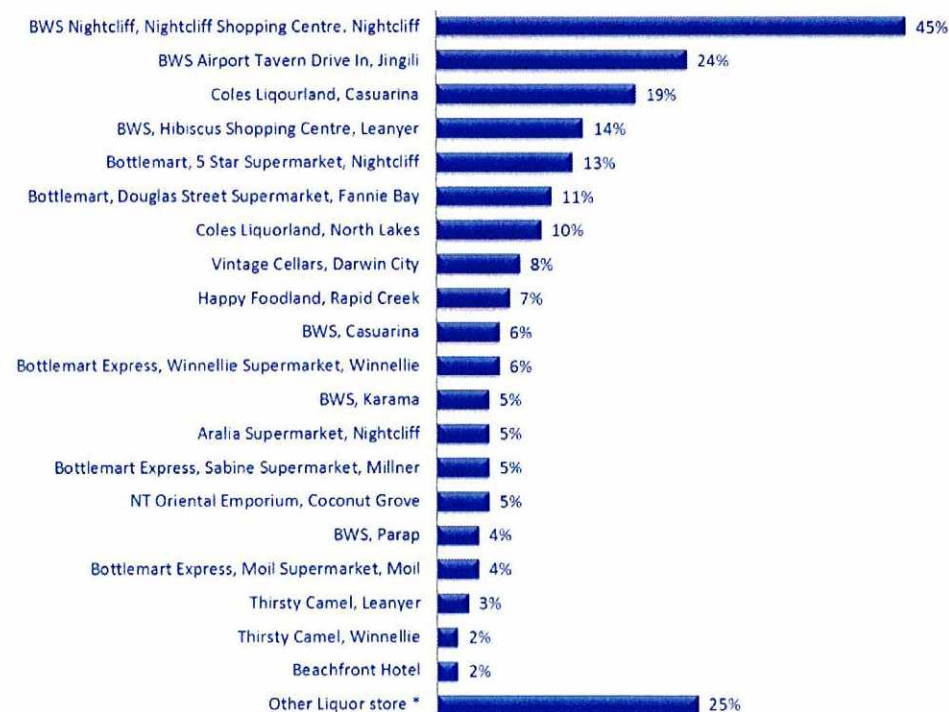
- BWS Airport Tavern Drive In (24%)
- Coles Liquorland, Casuarina (19%)

Those who believed the proposed store was a *good idea* (50%) were more likely to visit the BWS Nightcliff store.

7. Which of the following liquor stores (if any) have you visited just in the past 6 months?

Read out, Multiple response

■ BASE: Purchased takeaway liquor in past 6 months (n=339)



Main Liquor Store

Almost one quarter (23%) respondents who had purchased take away liquor (n=339) in the last 6 months considered the BWS Nightcliff store as their main liquor store, while others named:

- BWS, Hibiscus Shopping Centre, Leanyer (9%)
- Coles Liquorland, Casuarina (9%)

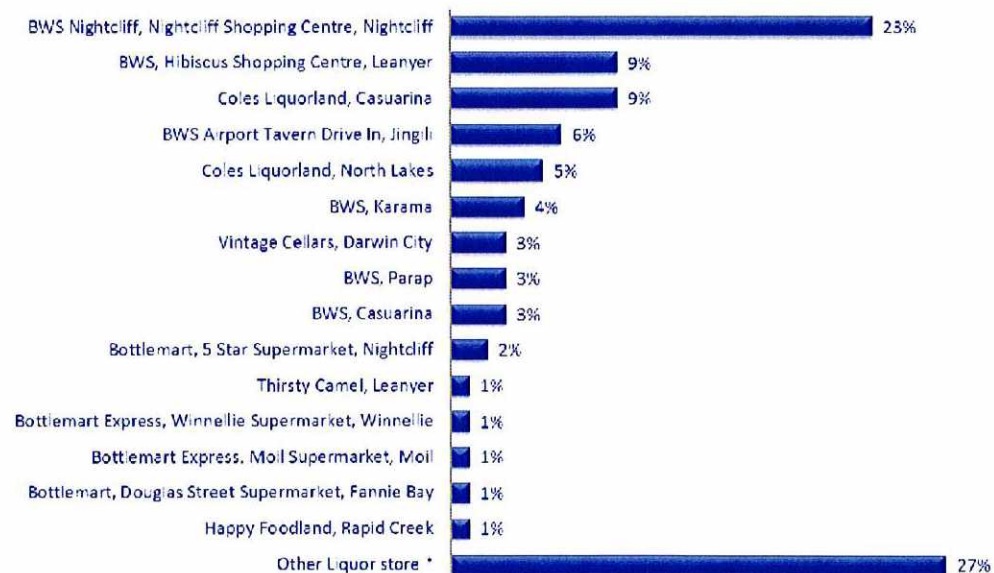
The following groups were more likely to indicate their main store was BWS Nightcliff:

- Those *likely to purchase takeaway liquor* (28%)
- Respondents *aged 75 plus* (42%)

8. Which would you consider to be your main store for purchases?

Single response

■ BASE: Purchased takeaway liquor in past 6 months (n=339)

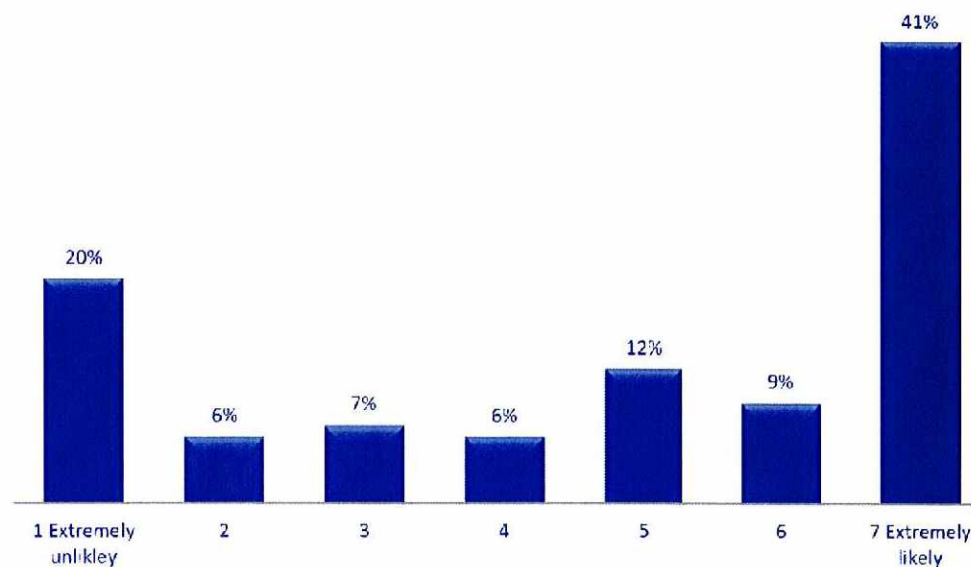


Likelihood of visiting

Total likelihood of purchasing takeaway liquor from the proposed Dan Murphy's store if it opens stood at 62% of all respondents. This was higher amongst those who had purchased takeaway liquor (n=339) in the last 6 months (69%).

Of this group more than 2 in 5 respondents (41%) indicated they would be **extremely likely** to purchase takeaway liquor from the proposed Dan Murphy's store if a store opens. This was higher amongst those who had purchased takeaway liquor (n=339) in the last 6 months (47%).

9. If the proposed Dan Murphy's store opens, how likely do you think you will be to visit Dan Murphy's to purchase any takeaway liquor?



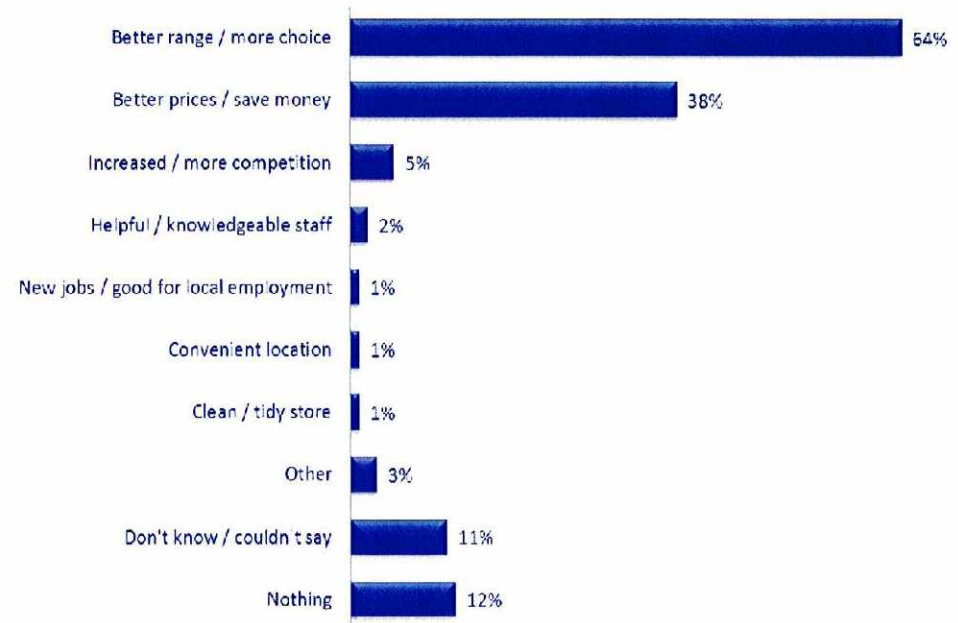
Offerings

A range of responses were given when asked what Dan Murphy's will offer its customers that is not currently available at their main liquor store, namely:

- Better range / more choice (64%)
- Better prices / saves money (38%)

10. What if anything do you think Dan Murphy's will offer its customers that is not currently available at your main liquor store?

CNRO, Multiple response



The following groups indicated Dan Murphy will offer *a better range / more choice*:

- Those who believed the proposed store to be a *good idea* (81%)
- Those *likely to purchase takeaway liquor* (82%)
- Respondents who believe the Northern Territory *should have access to a Dan Murphy store* (76%)
- Respondents who *have purchased takeaway liquor* in the past 6 months (71%)
- Respondents who believe there is a *need for a large-scale liquor store* in the Northern Territory (79%)
- Those who believe the proposed Dan Murphy store is in *the public's best interest* (78%)

While the following were more likely to name *better prices / saves money*:

- Those who believed the proposed store to be a *good idea* (46%)
- Those *likely to purchase takeaway liquor* (49%)
- Respondents who believe the Northern Territory *should have access to a Dan Murphy store* (43%)
- Respondents who believe there is a *need for a large-scale liquor store* in the Northern Territory (48%)
- Those who believe the proposed Dan Murphy store is in *the public's best interest* (46%)

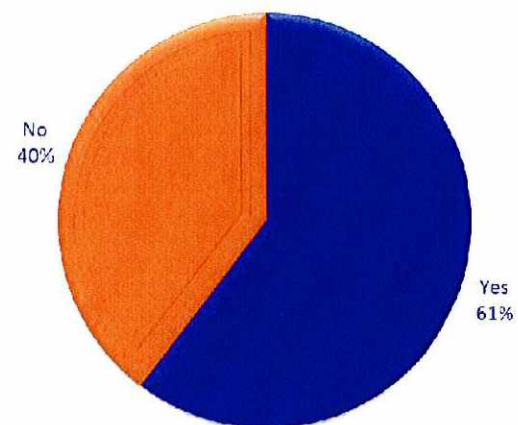
Need for a large-scale liquor store

More than 3 in 5 (61%) agreed there was a need for a large-scale liquor store in the Northern Territory, while 40% disagreed.

The following groups were more likely to believe there *is a need* to a large-scale liquor store:

- Those who believed the proposed store to be a *good idea* (84%)
- Those *likely to purchase takeaway liquor* (86%)
- Respondents who believe the Northern Territory *should have access to a Dan Murphy store* (80%)
- Respondents who *have purchased takeaway liquor* in the past 6 months (66%)
- Those who believe the proposed Dan Murphy store is in *the public's best interest* (89%)

11. Large-scale liquor stores have developed throughout Australia in the last decade. Do you believe that there is now a need for a large-scale liquor store in the Northern Territory?



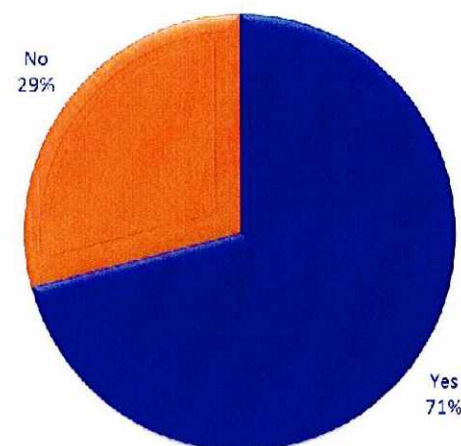
Expectations and demands

Most of those surveyed (71%) agreed the proposed Dan Murphy's liquor store **will enable the liquor industry in the Northern Territory to develop in line with contemporary community aspirations, expectations and demands for a greater range of products prices etc.**, while nearly 3 in 10 disagreed.

There was a higher incidence of the following groups agreeing with this statement:

- Those who believed the proposed store to be a *good idea* (92%)
- Those *likely to purchase takeaway liquor* (92%)
- Respondents who believe the Northern Territory *should have access to a Dan Murphy store* (89%)
- Respondents who *have purchased takeaway liquor in the past 6 months* (76%)
- Respondents who believe there is a *need for a large-scale liquor store in the Northern Territory* (95%)
- Those who believe the proposed Dan Murphy store is in *the public's best interest* (95%)

12. Do you believe that the proposed Dan Murphy's liquor store will enable the liquor industry in Northern Territory to develop in line with contemporary community aspirations, expectations and demands for a greater range of products, prices, etc.?



In the public interest

3 in 5 (59%) of respondents agreed the proposed Dan Murphy's store was in the public's interest and (42%) disagreed.

There was a higher incidence of the following groups *agreeing* with this statement:

- Those who believed the proposed store to be a *good idea* (80%)
- Those *likely to purchase takeaway liquor* (81%)
- Respondents who believe the Northern Territory *should have access to a Dan Murphy store* (76%)
- Respondents who *have purchased takeaway liquor in the past 6 months* (64%)
- Respondents who believe there is a *need for a large-scale liquor store* in the Northern Territory (86%)

13. Do you believe the proposed Dan Murphy's is in the public interest?

