Measuring Success of the NSW 24-Hour Economy Strategy

A project for the NSW Office of the 24-Hour Economy Commissioner

April 2023

Ingenium Research

About the data used in this report

The analysis in *Measuring Success of the NSW 24-Hour Economy Strategy* reflects the latest data available at the time this report was produced (June-December 2022).

The Australian Bureau of Statistics datasets in this report reflect the 2020/21 financial year, while New South Wales (NSW) state government datasets such as those supplied by Liquor & Gaming NSW, Transport for NSW and the NSW Bureau of Crime Statistics and Research (BOCSAR) provide insights into the 2021/22 financial year. Where possible, a time series of activity has been acquired to show trends over time.

Datasets sourced via the Google (October 2022) and Ticketmaster (December 2022) APIs provide a more recent snapshot of activity.

Further detail on the sources used in this document can be found in the Appendix.

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Introduction

Following the release of its first-ever 24-Hour Economy Strategy for Sydney in September 2020, the NSW Government appointed Michael Rodrigues as 24-Hour Economy Commissioner in March 2021. The Commissioner was tasked with implementing the Strategy and realising its vision to transform Greater Sydney into a 24-hour economy that is vibrant, diverse, inclusive and safe. The Strategy is built around five strategic pillars. Example initiatives are provided in Figure 1.

The Office of the 24-Hour Economy Commissioner has worked closely with other NSW government agencies to support pandemic economic recovery. During 2022 the team delivered the $50m CBDs Revitalisation Program, launched the Uptown district accelerator program and commenced a pilot of the Purple Flag safety accreditation scheme. The Office is also developing a platform that will bring together multiple data sources to provide an evidence base to manage the Greater Sydney's 24-hour economy.

Figure 1: Strategic pillars and example initiatives:

1 Integrated planning & place-making	2 Diversification of night-time activities	3 Industry & cultural development	4 Mobility & improved connectivity	5 Changing the narrative
Supporting the delivery of a $66m alfresco dining package, supporting the Fun State Environment Planning Policy (Fun SEPP) to streamline planning and licensing arrangements, commencing a pilot of the Purple Flag scheme and supporting the pilot Special Entertainment Precincts to manage noise.	Launching the $5m Uptown program to fast-track the formation of local business communities, working with local councils and via the Culture Up Late initiative to promote the extension of business' trading hours, activation of sporting precincts and supporting appropriate liquor licensing reforms.	Establishing a 24-Hour Economy Advisory Group comprising industry and government representatives, hosting quarterly Open Mike Night industry stakeholder events, forming a Senior Officers' Group comprising state government departments, developing a Local Area Acceleration Toolkit.	Establishing a Safety, Wellbeing and Mobility Working Group to promote responsible going out behaviour, supporting the Take Kare Safe Space program, participating in the Women's Safety Charter, and working to embed 24-hour economy principles into the planning of major precincts.	Hosting the CBDs Revitalisation Summit, supporting and attending events such as Global Cities After Dark; Fabrics of Multicultural Australia and REMIX, presenting at events such as the World Cities Culture Forum and supporting the launch and roll-out of the Destination NSW 'Feel New' campaign.

ABOUT THIS REPORT

This report aims to support the "Measuring Success" section (section five, page 68) of the 24-Hour Economy Strategy. An agreed set of low-cost and freely available metrics were agreed with the Office of the 24-Hour Economy Commissioner to benchmark and evaluate the success of the Strategy's key indicators. These metrics have been grouped around the Strategy's measurement framework themes of Social, Economic and Cultural.

Each measure has been given a high-level traffic light score, with green indicating the data shows strong performance, orange signifying neutral performance and red earmarking opportunities for improvement.

For details about the data sources used in the report, see page 23.

SOCIAL

The Strategy includes several initiatives that seek to improve social inclusion within Greater Sydney's night-time areas. Key objectives focus on enhancing these areas so that they are both safe and welcoming while also fostering a sense of wellbeing and resilience within the wider community. The Strategy also emphasises the importance of sharing these enhancements with a more diverse array of people through improved accessibility to these night-time hubs. Indicators in this report relating to the social theme include:

- Perceptions of safety
- Criminal incidents

ECONOMIC

The Strategy seeks to develop Greater Sydney's 24-Hour Economy, which in turn will attract the best global talent and create flow-on benefits to other sectors. There is a particular emphasis on growing the number of non-traditional NTE businesses to increase diversity of offering, better utilisation of spaces, while also expanding NTE activity across more of Greater Sydney's unique night-time hubs. Indicators in this report relating to the economic theme include:

- Core NTE performance
- NTE trading patterns and business clustering
- Liquor licensing
- Mobility and public transport use
- Gross State Product

CULTURAL

The Strategy commits to boosting the volume of cultural activities on offer and improving their affordability to provide more opportunities and spaces for people to engage in cultural activities. There is a goal to give a greater prominence to Indigenous storytelling and art, and the maintenance of places of cultural significance. Indicators in this report relating to the cultural theme include:

- Live performance offering
- Live performance ticket sales and revenue.

Key findings

Many of the key indicators from the Strategy are performing well, putting Greater Sydney's 24-Hour Economy in a strong position for the future. Social measures in particular have seen strong progress over the last few years. While cultural and economic measures have faced challenges due to the pandemic, signs of recovery are present – although increasing costs of living and wages are likely to be key issues on the horizon.

Social measures

Foster social inclusion; enhance community wellbeing, resilience and connectivity; ensure our towns centres are safe, welcoming and functional

1. In 2020/21, people in New South Wales felt much safer at night on public transport and in their local neighbourhoods than historically, and people generally felt safer than the rest of Australia.
2. In 2020/21, perceptions of safety at night in New South Wales were broadly similar to that of the United Kingdom.
3. Less than half (47%) of Greater Sydney's assault and drug incidents in 2020/21 were recorded at night.
4. Night time non-domestic violence assaults involving alcohol have been trending downwards, having declined -36% over the five years to 2020/21.

Economic measures

Attract the best global talent; grow the number of non-traditional Night Time Economy (NTE) businesses; spread NTE value-generating activities across Greater Sydney hubs.

5. Greater Sydney had close to 30k Core NTE businesses in 2020/21, 8% more than in 2018/19.
6. In 2020/21 there appeared to be decentralisation of activity from central Sydney, with establishments in surrounding areas having increased at a faster pace.
7. In 2020/21 more than 162k people were employed in Greater Sydney's Core NTE, -11% below pre-pandemic levels.
8. The Core NTE generated $22.5bn in sales turnover; in 2020/21, -3% below 2018/19 levels. Entertainment remained -20% below pre-pandemic levels.
9. In 2022, the City of Sydney and Inner West LGAs had the greatest density of consumer-facing businesses open in the evening and early night. Opportunities exist to extend opening hours.
10. Between August 2020 and September 2022, total liquor licences in Greater Sydney grew +6%, driven by strong growth (+21%) in packaged liquor licences – with pandemic lockdowns a likely factor in this performance.
11. When comparing 2018/19 to 2021/22, public transport use at night had recovered (-28%) more than public transport use during the day (-34%).
12. Gross Value Added for Food and Accommodation and Arts and Recreation sectors was substantially impacted by the pandemic in 2019/20 and 2020/21.

Cultural measures

Increase the volume of cultural activities on offer; increase the number of opportunities to engage with culture and creativity; maintain places of cultural significance

13. Over the last quarter of 2022, there were an increasing number of events that occurred across the Sydney LGA, with a particularly high number of theatre and rock music performances. This uplift in events is set to continue into the first quarter of 2023.
14. Across New South Wales in 2020 there were 1.96m attendees at live performances, which generated $183m in ticket sales. During this period venues had to close due to lockdowns, resulting in a decline of -73% from the 2019 pre-pandemic baseline.

Social measures

The Strategy recognises that a well-managed 24-economy should be both safe and welcoming. As such, this section examines perceptions of safety and trends in recorded criminal incidents at night – both of which are heading in a positive direction.

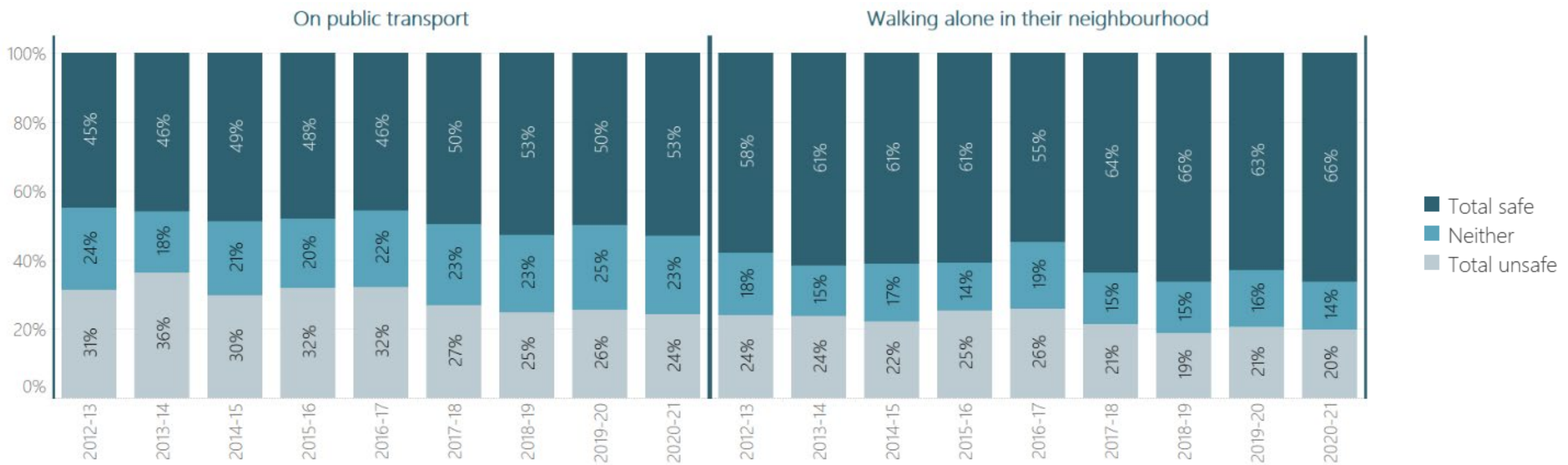
Perceptions of safety

People in New South Wales are feeling safer at night than they have done in the past. In 2020/21, more than half of people in New South Wales reported feeling safe at night on public transport (53%), compared to just 45% in 2013/14. Similarly, in 2020/21 66% of people reported that they felt while safe walking alone at night in their own neighbourhood; an increase from 58% in 2013/14.

In 2020/21 night time perceptions of safety were higher in New South Wales than in Australia as a whole (across Australia, 48% reported feeling safe on public transport at night, while 60% feel safe walking alone in their neighbourhood).

The New South Wales figures are comparable to that of the UK, where in June 2021, 64% of adults reported they would feel safe walking alone after dark in a quiet street close to their home, and 62% said they would feel safe in a busy public space such as a high street or train station.

Figure 2: Proportion of people in New South Wales who feel safe at night



Criminal incidents

Most (81%) non-domestic violence (non-DV) assaults involving alcohol in Greater Sydney occur at night, between the hours of 6pm and 6am. There were 2,888 night time non-DV assaults in Greater Sydney in 2021/22. The number of non-DV assaults is -36% lower in 2020/21 than it was in 2017/18 (4,521).

Almost a third (31%) of Greater Sydney's night time alcohol related non-DV assaults occurred in the City of Sydney in 2021/22. There were 899 incidents of this type in 2021/22, falling from 1,422 in 2017/18.

Less than half (47%) of assault and drug incidents in Greater Sydney were recorded as occurring at night in 2021/22. Between 2017/18 and 2021/22 the number of night incidents of this type declined by -10%, while daytime incidents increased 2%.

Figure 3: Alcohol-related non-domestic violence incidents in Greater Sydney

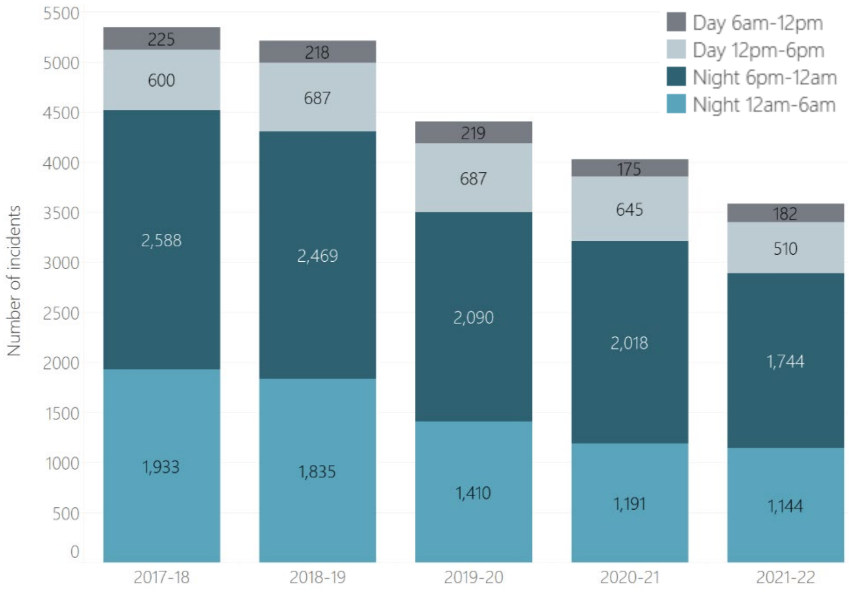


Figure 4: Greater Sydney recorded criminal incidents in 2021-22

Measure	Total offences	Assaults and drug offences at night	Alcohol related assaults at night	Non-domestic violent assaults at night	Alcohol related, non-domestic violent assaults at night
Number of incidents in 2021/22	368,969	26,992	5,729	6,558	2,888
% New South Wales in 2020/21	56%	54%	42%	47%	43%
% Change 2017/18-2021/22	-8%	-10%	-24%	-26%	-36%


OPEN
Welcome

Economic measures

Encouraging a diverse and vibrant NTE will assist in making Greater Sydney an attractive place for global talent. The number of Core NTE businesses has grown, while employment and sales turnover are recovering, however, wages and the cost of living are key challenges on the horizon for the sector.

Figure 5: Greater Sydney Key Core NTE Metrics

Measure	# Core NTE 2021 % Change 19-21	% Total Economy
Establishments	29,974 +8%	5.6%
Employment	162,280 -11%	6.5%
Sales Turnover	$22.5bn -2.9%	3.0%

Sub-sector	# Establishments % Change 19-21	% Core NTE
Drink	1,752 +2.5%	6%
Entertainment	9,094 +8%	30%
Food	19,128 +8%	64%

Core NTE performance

Establishments

In 2020/21, the Greater Sydney area had close to 30,000 Core NTE establishments; an 8% increase on the pre-pandemic baseline.

This growth was driven by Entertainment and Food businesses, both of which increased by 8%. Drink businesses have increased at a much slower pace (+2.5%), suggesting that a shift in diversity away from drink led nightlife is underway.

Growth in Entertainment has been led by creative and performing arts (+7% / +310 businesses) and sports and physical recreation activities (+13% / +274).

Employment

Core NTE employment was volatile during the pandemic, declining -23% between 2019 and 2020 increasing 15% from 2020 to 2021, with employment -11% below pre-pandemic levels as of 30 June 2021.

Drink employment remained -15% lower than pre-pandemic levels, with losses occurring from 2019 to 2020 and little growth between 2020 and 2021. Food employment also remained -14% below 2019 levels, despite a strong 15% increase from 2020 to 2021. Entertainment was perhaps the most volatile, declining -34% from 2019 to 2020, before rebounding 48% from 2020 to 2021, leaving the sector -3% below pre-pandemic levels.

Sales turnover

The sector generated $22.5bn in sales turnover in 2021, -2.9% below pre-pandemic levels. While Entertainment employment had recovered, sales turnover was still -$1.5bn (-20%) below the 2019 peak. Food and Drink, however, had surpassed their pre-pandemic levels to $12.5bn (+5%) and $3.5bn (+9%) respectively.

Geographic dispersal of activities

In the two-year period between June 2019 and June 2021, the number of Core NTE establishments in Greater Sydney increased by +8% (+2,182).

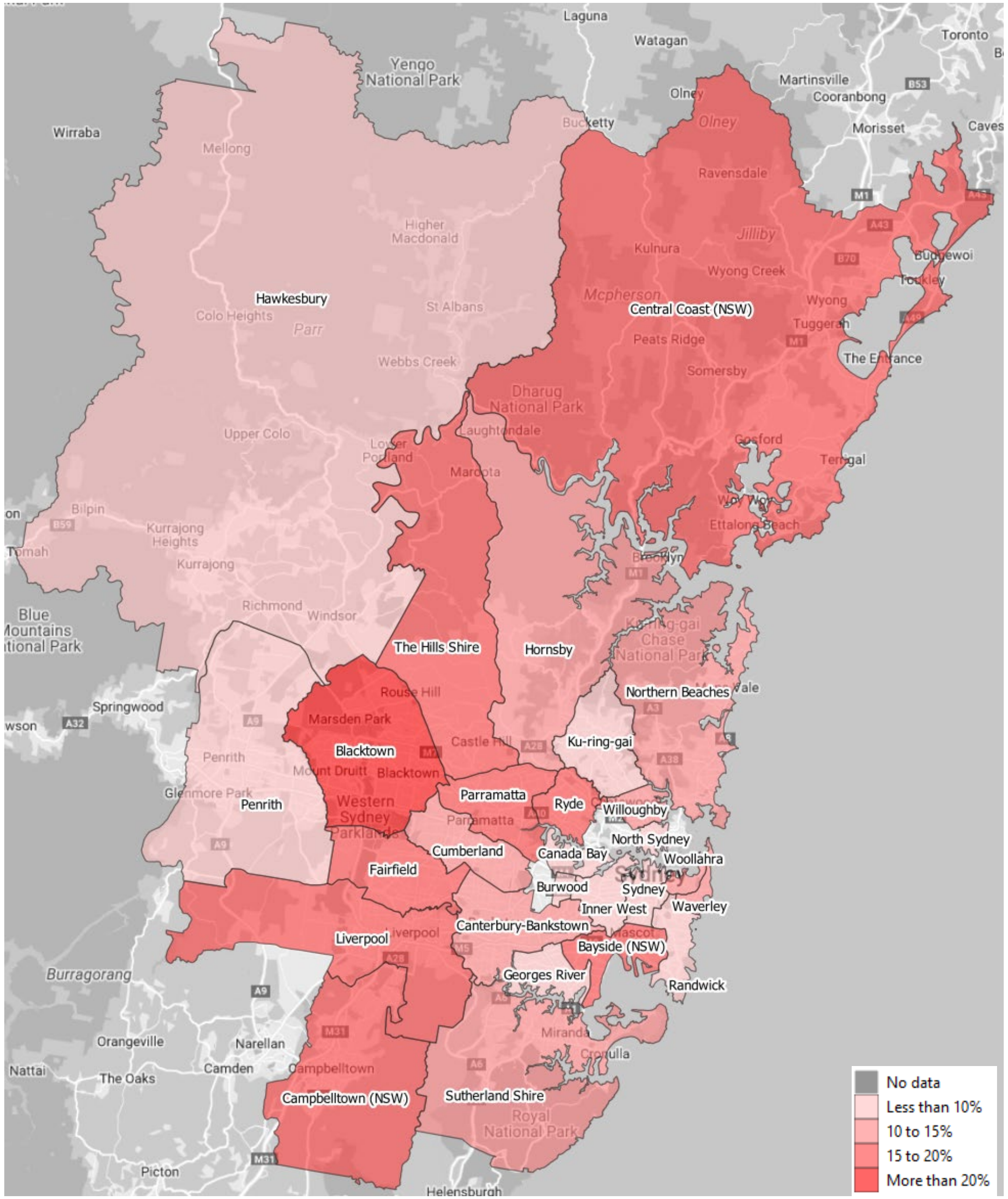
Figure 6 shows the percentage growth in Core NTE businesses across Greater Sydney during this period. The Local Government Area (LGA) with the largest absolute growth was the City of Sydney (+10% / +493 businesses), however, many other LGAs experienced a higher percentage growth in Core NTE firms during this period, suggesting a decentralisation of activity to surrounding areas. For example, the number of Core NTE establishments in the City of Blacktown increased by +22% (+220 businesses) across the two-year period, while Liverpool City Council experienced growth of 19% (+128 businesses). In both these LGAs, as with Greater Sydney as a whole, growth was driven by restaurants and cafes.

Table 1 shows the top ten LGAs with the greatest absolute growth in Core NTE establishments between 2018/19 and 2020/21. These ten LGAs accounted for more than half of the absolute growth in Greater Sydney.

Table 1: LGAs with the greatest absolute growth in Core NTE establishments

LGA Name	Establishments 2018/19	Establishments 2020/21	# growth 2018/19 - 20/21	% growth 2018/18 - 20/21
Sydney	5,096	5,589	493	10%
Blacktown	983	1,203	220	22%
Central Coast	1,300	1,520	220	17%
City of Parramatta	1,227	1,430	203	17%
Northern Beaches	1,539	1,699	160	10%
Canterbury Bankstown	1,486	1,638	152	10%
The Hills	844	984	140	17%
Bayside	854	994	140	16%
Cumberland	957	1,097	140	15%
Sutherland	995	1,132	137	14%

Figure 6: Percentage growth in Core NTE establishment 2018/19-2020/21



NTE trading patterns and business clustering

For this report, a snapshot of the data behind Google maps has been used to understand the clustering (see maps overleaf) and trading patterns of Food, Drink, Entertainment, and Retail businesses in the LGAs of Sydney, Inner West, Randwick and Parramatta. A low proportion of businesses trading at specified times/locations may present an opportunity to extend trading hours.

The City of Sydney has the greatest density of Food, Drink and Entertainment businesses open in both the evening (80 per km^2) and early night (56 per km^2). The City also has the highest density of Retail businesses open during these times (64 and 16 per km^2 respectively). Despite this, there remains opportunity for more businesses to open at night. For example, just 62% of the City of Sydney's Food, Drink and Entertainment businesses open at some point during the evening. This is lower than the other LGAs, likely due to the high proportion of cafes and sandwich shops catering for daytime office workers.

Inner West has the next highest density of evening and early night activity among its Food, Drink, Entertainment and Retail business. There is a lower proportion of Retail (38%) that trade at some point during the evening, suggesting opportunity for extension of trading hours for the remaining 62% of businesses that do not currently open after 6pm.

Randwick City and the City of Parramatta have similar trading patterns in Food, Drink and Entertainment and in Retail. Randwick City has a slightly higher density of businesses that operate in the evening, but this difference becomes less apparent by the early night.

*Table 2: **Food, Drink and Entertainment** businesses (Oct 2022)*

Time	LGA	# Open	% Open	Density per km^2
Evening (6-9pm)	Inner West	811	64%	23
	Parramatta	577	67%	7
	Randwick	448	70%	12
	Sydney	2,139	62%	80
Early night (9pm-midnight)	Inner West	470	37%	13
	Parramatta	302	35%	4
	Randwick	226	35%	6
	Sydney	1,491	43%	56

*Table 3: **Retail** (incl. hair and beauty, excl. grocery) businesses (Oct 2022)*

Time	LGA	# Open	% Open	Density per km^2
Evening (6-9pm)	Inner West	561	38%	16
	Parramatta	517	46%	6
	Randwick	248	49%	7
	Sydney	1,710	50%	64
Early night (9pm-midnight)	Inner West	114	8%	3
	Parramatta	85	8%	<3
	Randwick	45	9%	<3
	Sydney	381	11%	14

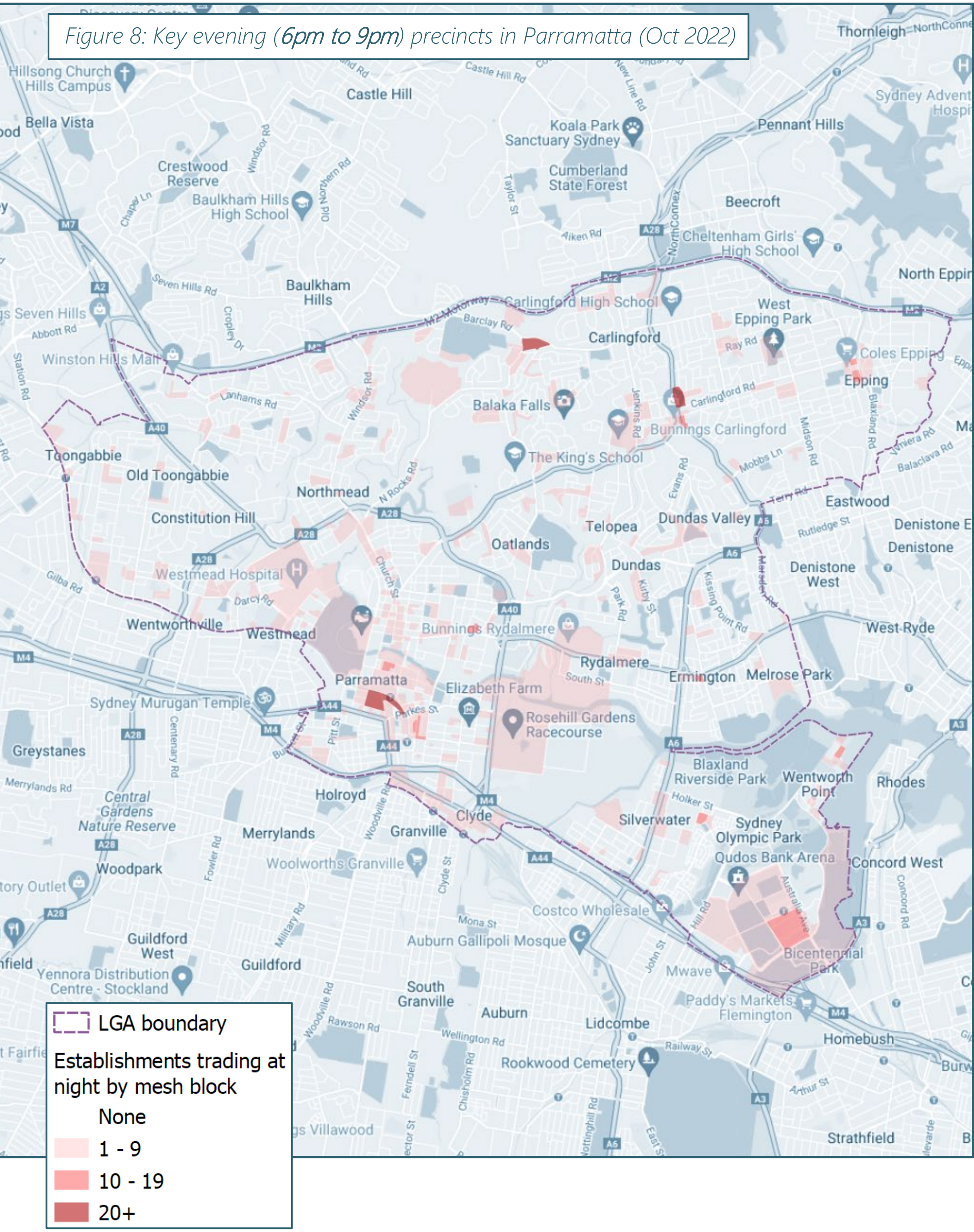


Figure 8: Key evening (6pm to 9pm) precincts in Parramatta (Oct 2022)

Figure 7: Key evening (6pm to 9pm) precincts in Sydney, Randwick, and Inner West (Oct 2022)

Liquor licensing

As of September 2022, there are 18,582 actively trading liquor licenses across New South Wales. Just over half (9,725 / 52%) of these are located within the Greater Sydney area. Most of Greater Sydney's liquor licenses are classified as On-Premises (57%) and Packaged Liquor (19%)

The number of liquor licenses in Greater Sydney grew by +6% between August 2020 and September 2022 – a slightly faster pace than NSW as a whole (+5%). Packaged Liquor licenses grew the fastest in both Greater Sydney (+312 / +21%) and New South Wales (+419 / +16%), with the pandemic lockdowns a likely factor in this.

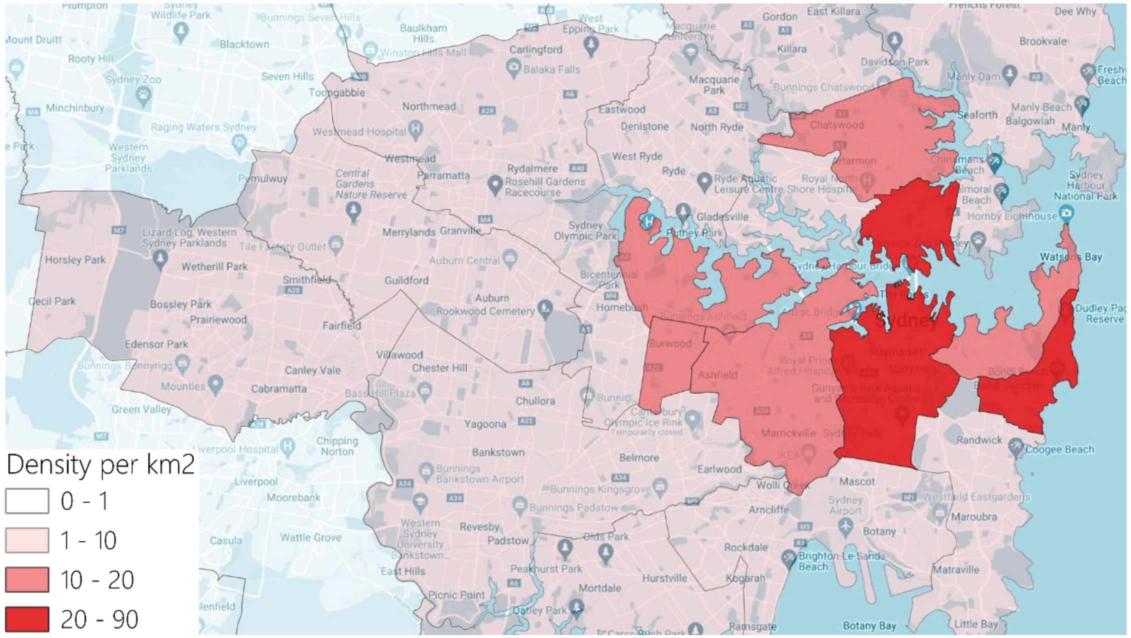
The City of Sydney (2,330) had the greatest number of liquor licenses followed by Northern Beaches (670) and Inner West (649).

Across Greater Sydney, 19% of licenses are permitted to operate after midnight, while 14% can operate after 3am and 9% can operate after 5am. Hotel licenses are most likely to operate after midnight (37%), followed by general On-Premises (31%) and Club licenses (27%).

Within Greater Sydney, the City of Sydney has the greatest number and percentage of liquor licenses permitted to operate after midnight (525 / 23% of all City of Sydney liquor licenses).

The local government areas with the next highest numbers of these licenses are Inner West (88), the City of Canterbury-Bankstown (80), Northern Beaches (80) and the City of Parramatta (68).

Figure 9: The density per km² of liquor licenses by local government area



Liquor and gaming NSW have an incentivised fee-reduction and extended trading scheme for liquor license holders that meet eligibility criteria to be classified as a live music or a live performance venue.

The majority (123 / 62%) of the venues that belong to this live venue scheme are located in Greater Sydney. Most (81) of these are classified as live music venues. The local government areas with the highest number of these live music venues are the City of Sydney (39), Inner West (17) and Randwick (5).

Greater Sydney also has 42 licensed live performance venues, most of which are based in City of Sydney (26), followed by Inner West Council (3).

Public transport use

Opal tap-on and tap-off data[i] for Greater Sydney shows the negative impact that the pandemic had on people's mobility. Data from the last year show signs of recovery, but in June 2022 day time (6am-6pm) tap-ons and tap-offs remained 34% lower than in June 2019. Night time tap-ons and tap-offs, however, were 28% lower than pre-pandemic, showing that night time mobility is recovering at a faster rate than day time mobility. In June 2022, there were 18 million tap-ons and tap-offs at night, which is the highest since February 2020.

Figure 10: Opal tap-ons and tap-offs across Greater Sydney July 2017 to June 2022

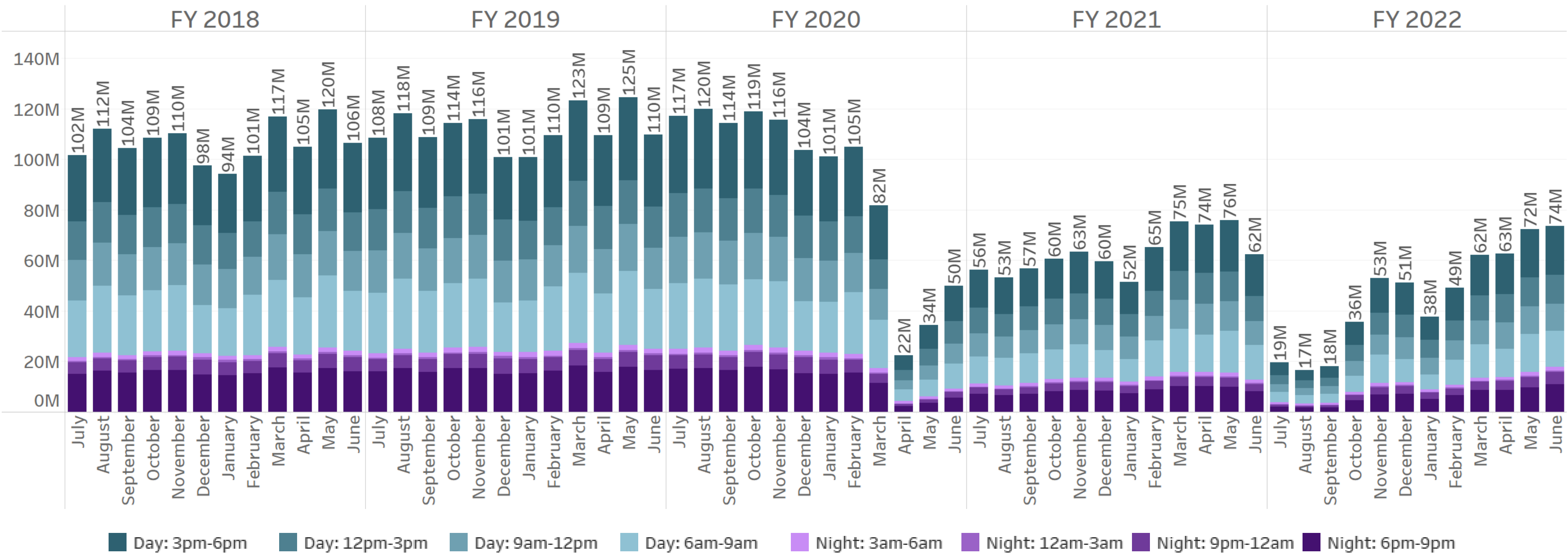


Figure 11, overleaf, shows the percentage change in the number of night time (6pm to 6am) tap-ons and tap offs in Greater Sydney from 2018/19 to 2021/22. It can be seen that in 2021/22, public transport use in many dense and centralised urban areas, such as City of Sydney (North) and Parramatta (North) remained considerably lower (both -62%) than in 2018/19. Some more suburban areas, however, have fared comparatively better or have grown, such as the residential areas surrounding Crestwood Reserve in the Hills Shire (+23%), and Roselands in Canterbury Bankstown (-37%) - suggesting a potential decentralisation of activity.

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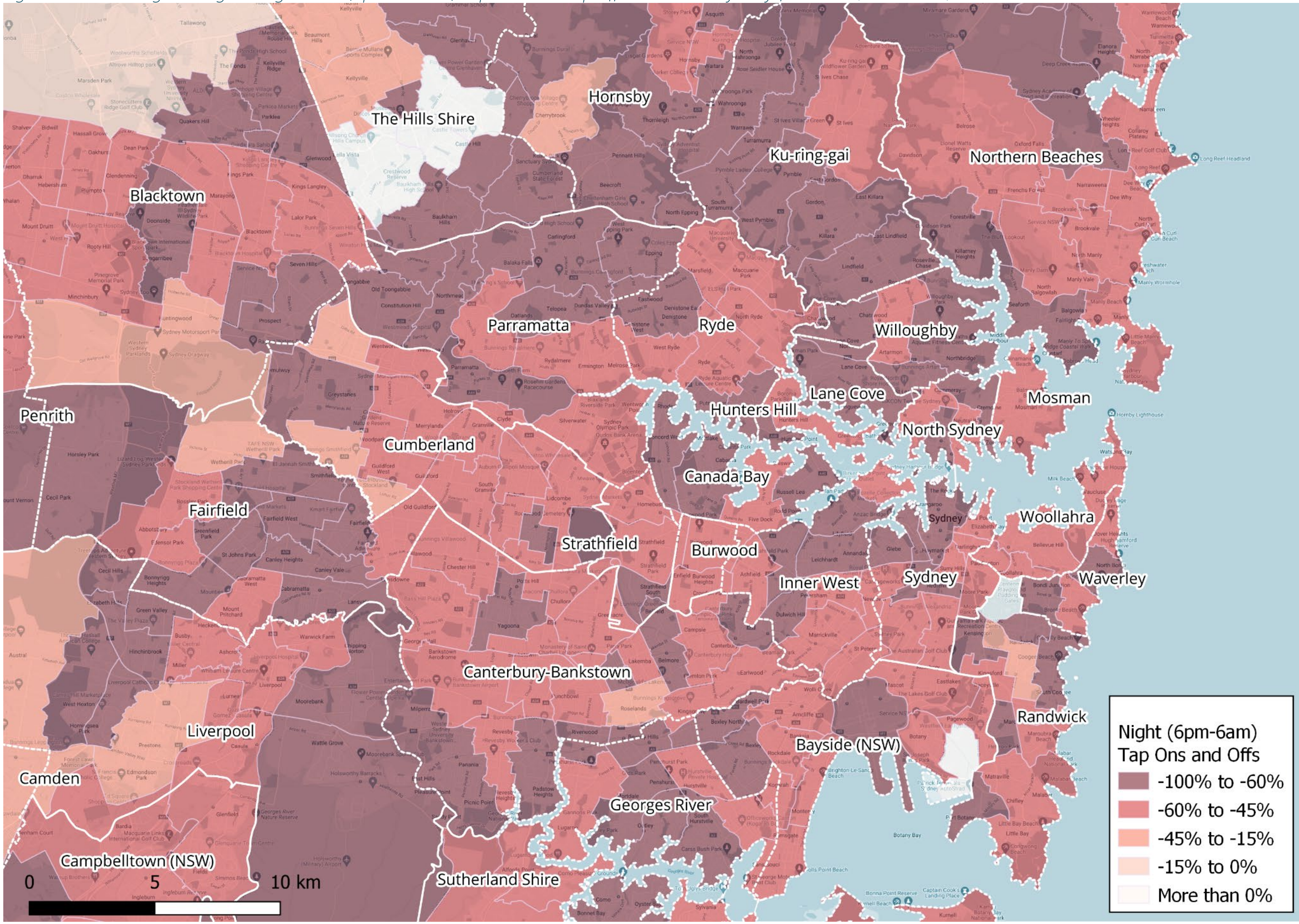
[i] Please note that data includes trips made using Opal cards as well as trips that used Contactless Transport Payments (CTPs) with a credit or debit card.

Figure 11: Percentage change in night time (6pm to 6am) tap-ons and tap offs in Greater Sydney from 2018/19 to 2021/22:



Google Mobility

Retail and recreation visits remain lower than pre-pandemic but are recovering. As of mid-October 2022, people continued to work from home more than they did pre-pandemic, with less time spent in workplace locations. Similarly, people continued to spend less time in retail and recreation locations – particularly within Sydney LGA, compared to wider New South Wales and Australia as a whole (which had returned, on average to pre-pandemic levels). The number of people spending time in retail and recreation areas had been gradually increasing since the mid-2021 lockdowns, however the City of Sydney remained -27% below the pre-pandemic baseline as of 9 October 2022.

Figure 12:Trends in location-based mobility compared to pre-pandemic baseline February 2020-October 2022

Gross State Product

One of the 24-Hour Economy Strategy's key indicators of success is an increase in the creative sector's contribution to Gross State Product (GSP). GSP data is available at a sector and state level, and the most appropriate sectors to examine in this context are Food and Accommodation and Arts and Recreation. In 2021, these sectors combined contributed $18.3bn to New South Wales' economy.

The Arts and Recreation sector contributed $4.6bn to New South Wales' GSP in 2021, representing a 31% share of Australia's Gross Value Added (GVA) for this sector; similar to the share in 1993 (32%).

The Accommodation and Food sector contributed a much larger $13.7bn to New South Wales' GSP in 2021, representing a 35% share of Australia's GVA for this sector. In 1993, New South Wales' share of the Australian GVA for this sector was much higher (43%), suggesting there has been greater growth in activity/productivity in other states and territories.

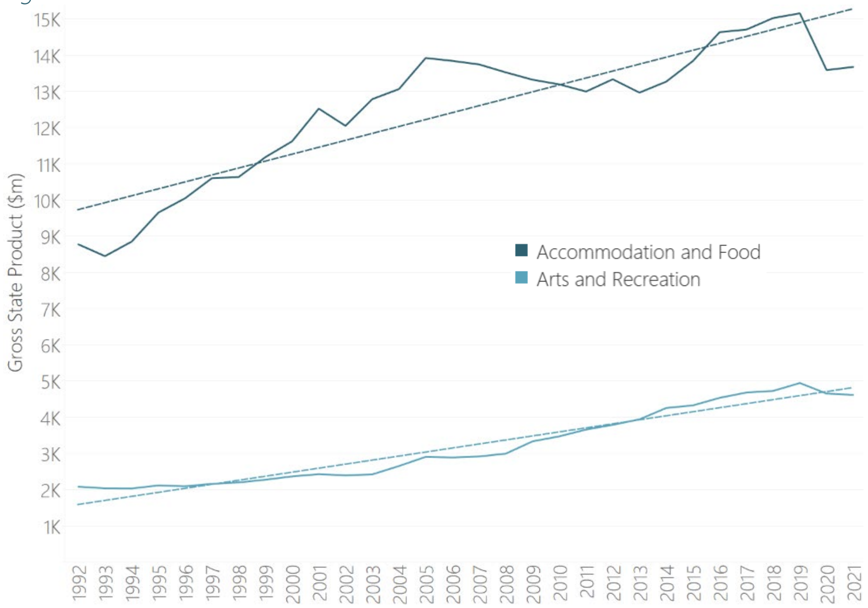
Figure 13 shows the trends in these sectors between 1993 and 2021. It can be seen that there has been growth in both sectors over the past 30 years. Following a peak of $13.9bn in 2005 the Accommodation and Food sub-sector sustained a period of downturn, before recommencing strong growth from 2013.

The impact of the pandemic was felt profoundly in these two sectors, and this can be seen in the chart. In the year ending June 2020, New South Wales' Accommodation and Food sector experienced a decline of -10%, representing a loss of -$1.5bn compared to the previous year. The year ending June 2021, however, saw a small recovery of 0.6% ($87m).

Similarly, in the year ending June 2020, the New South Wales Arts and Recreation sector experienced a decline of -5.9%, representing a loss of -$291m compared to the previous year. The year ending June 2021, saw further losses of -$36m.

In both sectors, the losses and recovery in New South Wales has been similar to Australia as a whole.

Figure 13: New South Wales Gross Value Added 1993-2021



Cultural measures

The Strategy recognises the importance of culture to the 24-hour economy and seeks to increase the available opportunities to engage in cultural activities for the wider population.

Live performance offering

Results from Ticketmaster indicate an increasing number of events occurring across the City of Sydney LGA over the last quarter of 2022 and first quarter of 2023.

There were 73 events scheduled for December 2022, which represented a 43% increase on October. This was driven by theatre productions – particularly the opening of the new Cinderella show and the continuation of Moulin Rouge.

The number of music events scaled up across November and December, with five acts having performed shows over the course of the two months, including Jack Johnson, Pixies and 5 Seconds of Summer. Music events (as at December 2022) look to be quieter in January and February 2023 but are scheduled to pick up again in March.

Conversely, the number of scheduled comedy events scaled down between October and January with shows from Bill Bailey and Carl Barron having finished up in October and November, although 10 events are currently (as of December 2022) planned for February.

While results only cover events scheduled via Ticketmaster, it demonstrates a wide diversity of activities are on offer.

Table 4: Recorded Ticketmaster events – October 2022 to March 2023

		2022			2023		
Event genre	Total	Oct	Nov	Dec	Jan	Feb	Mar
Theatre	251	27	41	45	59	39	40
Music	51	6	10	15	3	5	12
Comedy	41	10	9	2	4	10	6
Miscellaneous	28	7	5	2	1	7	6
Family and children	21	0	0	0	19	2	0
Equestrian	14	1	1	6	1	4	1
Boxing	9	0	0	0	0	9	0
Magic & Illusion	4	0	0	0	0	4	0
Circus & Specialty Acts	2	0	0	2	0	0	0
Dance	2	0	0	0	0	0	2
Cultural	1	0	0	1	0	0	0
Health/Wellness	1	0	0	0	0	0	1
Lecture/Seminar	1	0	0	0	0	1	0
Total	**426**	**51**	**66**	**73**	**87**	**81**	**68**

Live performance ticket sales and revenue

While the number of events is increasing in 2023, the sector was substantially impacted by the pandemic. During a period where live performance venues had to close due to COVID-19 lockdowns, results from Live Performance Australia found that both attendance and revenue at live performances in NSW declined by 73% from the 2019 pre-pandemic baseline. In 2020, attendance at live performance events in New South Wales totalled 1.96m, generating $182.5m in revenue. Spend per attendee in 2020 fell to just $22 (from $82 in 2019), although this will have risen again following the easing of pandemic restrictions.

Contemporary music and musical theatre events saw the largest absolute declines in ticket sales between 2019 and 2020, losing $163.7m (-60%) and $90.6m (-80%) respectively compared to 2019.

Figure 14: New South Wales live performance key statistics

Measure	Attendance	Ticket revenue	Spend per capita
NSW in 2020	1.96m	$182.5m	$22
NSW in 2019	7.16m	$666.7m	$82
% Change 2019-20	-73%	-73%	-73%
% Australia 2020	30%	34%	-

Figure 15: New South Wales live performance ticket sales ($m) 2019 compared to 2020, split by event type

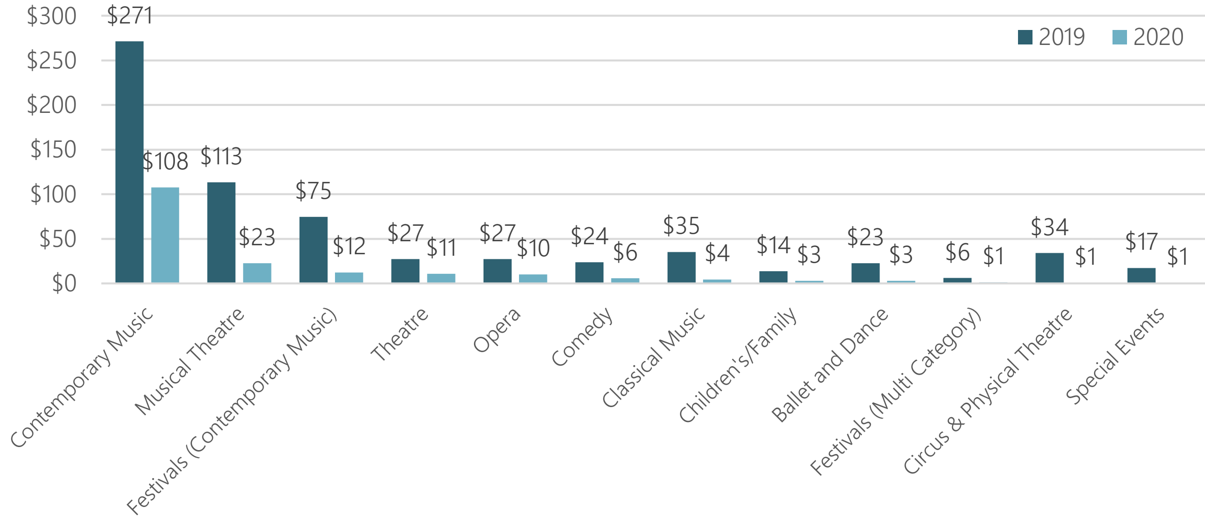
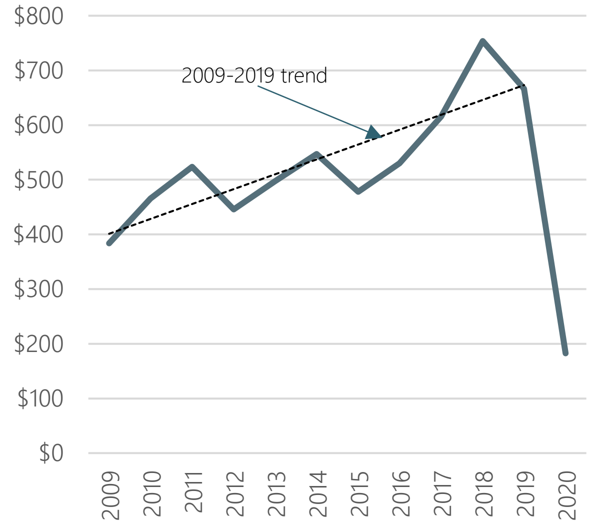


Figure 16: Trend in NSW live performance revenue ($m)



Appendix

Data sources

The following table provides a summary of the key data sources utilised within this report, covering the measures used, timeframes and geographies.

Theme	Chapter	Measures	Source / Timeframe	Geography
Social	Perceptions of safety	% of people feeling safe at night on public transport % of people feeling safe at night walking alone in their neighbourhood	Report on Government Services (RoGS) 2012/13-2020/21 UK Office for National Statistics	NSW
	Criminal incidents	Total offences; assault and drug offences at night Alcohol related assaults at night Non-domestic violent assaults at night Alcohol related non-domestic violent assaults at night	NSW Bureau of Crime Statistics and Research (BOCSAR) 2017/18-21/22	Greater Sydney
Economic	Core NTE performance	Establishments in Core NTE sectors of Food, Drink and Entertainment Employment in Core NTE sectors of Food, Drink and Entertainment Sales turnover in Core NTE sectors of Food, Drink and Entertainment	CCCLM 2016/17-20/21, using ABS CABEE ABS Labour Force Survey and ABS Australian Industry	Greater Sydney
	NTE trading patterns and business clustering	% of businesses undertaking Core NTE or Accommodation activities that are trading 6pm-9pm or 9pm-12am on at least one day of the week % of non-food retail trading 6pm-9pm	Ingenium Research, using Google Places Snapshot as at Oct 2022	Sydney Inner West Randwick Parramatta
	Liquor licensing	Number of active liquor licences Density of liquor licenses per km^2	Liquor and Gaming NSW (Sept 2022)	Greater Sydney
	Public transport use	Number of Opal tap-ons and tap-offs, by time of day/night	Transport for NSW	Greater Sydney
	Google Mobility	% change since pre-COVID in visits to residential areas % change since pre-COVID in visits to workplaces % change since pre-COVID in visits to retail or recreation	Google Mobility Jan 2020 to Oct 2022	Sydney NSW Australia
	Gross State Product	Industry gross value added (current prices) of Food and Accommodation Industry gross value added (current prices) of Arts and Recreation	ABS National Accounts: State Accounts 1991/92-20/21	NSW
Cultural	Live performance offering	Events scheduled in 2022 via Ticketmaster	Ticketmaster Snapshot of 2022 events as of Dec 2022	Sydney
	Live performance ticket sales and revenue	Total event attendance Total ticket revenue	Live Performance Australia 2019-2020	NSW

Geographic definitions

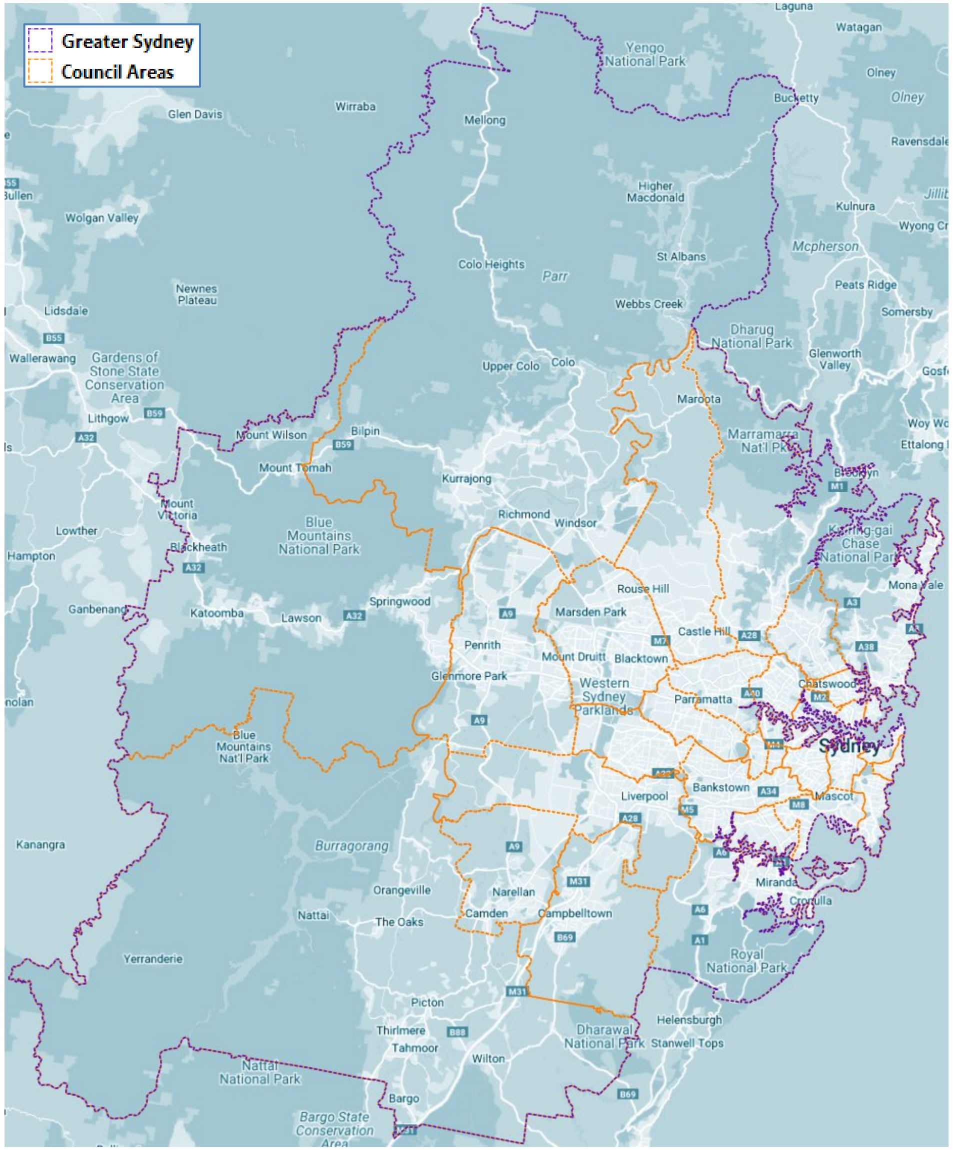
Greater Sydney covers a total of 33 council areas across the wider Sydney area, which are outlined in the table and map below.

Council areas in Greater Sydney

Bayside	Blacktown
Blue Mountains	Burwood
Camden	Campbelltown
Canada Bay	Canterbury–Bankstown
Cumberland	Fairfield
Georges River	Hawkesbury
Hornsby	Hunter's Hill
Inner West	Ku–ring–gai
Lane Cove	Liverpool
Mosman	North Sydney
Northern Beaches	Parramatta
Penrith	Randwick
Ryde	Strathfield
Sutherland	Sydney
The Hills	Waverley
Willoughby	Wollondilly
Woollahra	

Source: https://www.planning.nsw.gov.au/plans-for-your-area/a-metropolis-of-three-cities/greater-sydney-districts

Figure 17: Greater Sydney area and associated council areas

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