



The Committee for
Sydney

**SYDNEY
AS A
24-HOUR
CITY**

MARCH 2018



SUMMARY

In May 2017, the Committee for Sydney established a Commission on the Night-time Economy in Greater Sydney. The Commission was co-chaired by the Hon. Peter Collins and Michael Rose, Chair of the Committee for Sydney. Membership of the Commission included representatives from state and local governments, businesses, cultural institutions and peak bodies (a full list of organisations involved in the Commission can be found at the back of the document).

The primary objective of the Commission was to explore and define the economic, social, cultural and civic potential of Greater Sydney as a 24-hour city. Our focus has been on Greater Sydney, not just the harbourside CBD. Our work reflects the fact that a successful night-time economy requires the coordination of multiple agencies and actors, effective planning and good governance and regulation. As such the Commission's recommendations are grouped in four areas:

- Expanding the diversity of night-time activities
- Effective Governance and Regulation
- An integrated approach to Planning and Transport
- Promoting Greater Sydney as a 24-hour city

Our contribution to this debate builds upon an extensive body of work from universities, state and local governments and other organisations. We recognise that there is no 'silver bullet' in creating a diverse, accessible and vibrant 24-hour city, however our report contains recommendations and examples of global best practice, which we feel will help Sydney achieve its potential as a 24-hour city.

RECOMMENDATIONS

1 Expanding the diversity of night-time activities

- Arts and cultural institutions should build upon the success of Culture Up Late to offer late-night access on certain days, all year round.
- This could also include the development of a 'First Thursdays' style scheme in Greater Sydney for smaller galleries and museums to stay open until at least 9pm.
- Cultural institutions should consider collaborating to offer a discounted pass to visit a number of cultural institutions at night over a weekly or monthly period.
- The property and arts and culture sectors should develop new partnerships to showcase temporary public exhibitions and activate underused land or buildings.
- In major urban centres, late-night shopping should be extended to Friday and Saturday. Councils should allow shops to open until at least 10pm without formal development approval.
- State government departments and councils should review opening hours of services such as libraries and gyms to assess demand for night-time services.

2 Effective governance and regulation

- NSW Department for Premier and Cabinet should lead the development of a night-time economy strategy for Greater Sydney.
- NSW Government should introduce a coordinating figure to bring together different agencies and actors in the night-time economy. Options include a 'Night Czar/Mayor' or Minister for the Night-Time Economy.
- There should be ongoing evaluation by NSW Government into the impact of 'relaxations' of the lockout laws in Sydney's night-time precincts following the recent law changes, prompted by the Callinan Review.
- NSW Government should examine the introduction of Amsterdam-style 'planned districts' for areas with dense and diverse night-time activities, such as Kings Cross. A voluntary, community-led approach, such as implemented in Newtown, is also a model worth considering.
- Businesses that are participants in the night-time economy should establish a Night-time Industries Association in NSW to drive coordination and collaboration and ensure that business has strong voice in this policy area.

3 An integrated approach to planning and transport

- Local Councils responsible for major night-time precincts should pilot 'Night-time Business Improvement Districts' as a genuine partnership between councils and local businesses involved in the 24-hour economy.
- Options for funding raised through Business Improvement Districts might include upgrading of CCTV networks where relevant, better lighting and streetscape upgrades.
- A Night Zone – Safer Transport Initiative should be piloted, potentially in Business Improvement Districts.
- Transport for NSW should work with councils to develop an integrated transport strategy for major night-time employment and entertainment precincts.
- In conjunction with the development of this strategy, TfNSW should pilot extra public transport services for major night-time precincts.
- The Commission supports the establishment of a neon grid, a series of identified entertainment precincts across the city, connected by an efficient and accessible late-night transportation system.
- Planning controls should be amended so that any new development with a residential component within 100 metres of an entertainment venue will have to assess the noise from that venue and design and build to manage the noise.
- Amend the SEPP Exempt and Complying Codes 2008 to allow for small scale arts venues as a temporary use under all zonings except Residential.

4 Promoting Sydney as a global 24-hour city

- NSW Government, in partnership with other agencies, should extend existing promotional guides to produce a guide to night-time activities, including a digital version, to market and promote Sydney to regional and international visitors.
- Councils across Greater Sydney could consider introducing a scheme similar to the 'Purple Flag' project in the UK, an accreditation process that allows members of the public to quickly identify town and city centres that offer an entertaining, diverse, safe and enjoyable night out. Councils should also work on cross-boundary night-time economy strategies.
- NSW Government should work with councils and the Greater Sydney Commission, as well as relevant agencies, to develop an integrated wayfinding standard for Greater Sydney, with an appropriate focus on night-time activities.

INTRODUCTION

THE HON. PETER COLLINS, CHAIR – NIGHT TIME ECONOMY COMMISSION
MICHAEL ROSE AM, EXECUTIVE CHAIRMAN – COMMITTEE FOR SYDNEY

Sydney has a well-earned reputation as a liveable global city. In a range of benchmarking studies, including the Committee for Sydney's most recent, *Joining the Top Table: Benchmarking Sydney's Performance*, Sydney scores well against other global cities on metrics of liveability, image, culture and diversity.

We are a city blessed with an outstanding natural environment, a pleasant climate and a diverse, multi-cultural community that has enriched our cultural fabric.

An excellent quality of life is underpinned by access to the kind of amenities associated with a vibrant city: excellent cultural and entertainment infrastructure; outstanding restaurants and bars; diverse and contemporary retail and safe environments for the community to enjoy.

However, in recent years there has been considerable public debate in Sydney about our potential as a night-time city, the type of services available during the night and the attitude of state and local government agencies to night-time activities. This is not a debate unique to Sydney; many other global cities are focused on how to maximise the impact and potential of their night-time economy.

Much of the recent debate has focused on the NSW Government's introduction of "lockout" style laws in some areas in 2014. These laws were introduced in response to a number of violent incidents within the Sydney CBD, some of which tragically ended in the loss of life. Discussions concerning the merits and effectiveness of these laws have taken place since their introduction and have involved a significant number of Committee for Sydney members. The Committee has welcomed this discussion but is also keen to ensure that consideration of Sydney's night-time life and economy takes into account a wider range of social, cultural, business and community activities across Greater Sydney. For this reason, the Committee established a Commission into the

Night-Time Economy in Greater Sydney, to examine the broad economic, social and cultural impacts of a vibrant and diverse 24-hour economy.

The Commission's terms of reference have been deliberately broad. Whilst we do not discount the importance of the debate over the lockout laws, our aim has been to examine some of the wider potential of, not just the night-time economy, but of the 24-hour economy more generally. Our primary question, in short, is how can Sydney best achieve its potential as a genuine 24-hour city?

The Commission has also sought to examine international best-practice, as well as highlighting where Sydney already has great night-time activities. Our focus has been on Greater Sydney, reflecting the fact that our city is growing rapidly westward and that a vibrant 24-hour economy should be priority for many areas of the city, not just the harbourside CBD.

Maximising the economic and social potential of the night-time economy is a key challenge for global cities. A number, most notably Amsterdam, Berlin, London and San Francisco, have arguably set the benchmark in terms of creating, investing in, and promoting vibrant and diverse 24-hour cities. Other Australian cities have also been proactive, not least Melbourne, in extending late night public transport, and Adelaide, in encouraging smaller bars and cafes in its CBD and Perth, where many retailers stay open until 9pm during the week.

Two important factors have underpinned our work. Firstly, a recognition that a substantial amount of

policy work has already been undertaken on the night-time economy, in Sydney, in other Australian cities and internationally. We have sought to build upon the extensive work by pioneering councils such as the City of Sydney and City of Parramatta and by the NSW Government, particularly Create NSW.

We also acknowledge the work undertaken by Local Government NSW in conjunction with the councils of Wollongong City, City of Sydney, City of Newcastle, City of Parramatta, and Waverley Council, who formed the Night Time Economy working group in 2016 and hosted the inaugural Night Time Economy Councils' Committee in 2017, working to share information on best practice and establish a consistent approach to the night-time economy.

We recognise that the private sector has a key role to play in the promotion and coordination of the 24-hour economy. Whilst many of the Commission's recommendations relate directly or indirectly to state or local government, the business community must be a central part of this discussion.

Our task was not to reinvent the wheel, but to bring together a group representing key sectors in the night-time economy to develop innovative and integrated ideas to ensure that Sydney has a vibrant 24-hour economy.

Secondly, our Commission is clear that there is no simple one answer to solve every challenge associated with the night-time economy. It is a diverse and complex ecosystem and one that sometimes creates conflict within itself. For example, our investigations highlighted an existing and growing division between the desire for more outdoor activities at night, such as outdoor dining, night markets and live music, and an ever-increasing number of inner-city dwellers resistant to potentially loud activities taking place outside their residences.

The Committee is grateful to the people who participated in our Commission and provided their personal views and input from their organisations. It has been a true 'group effort'. Whilst the focus of the Commission has been to build as much consensus as possible, it should be stressed that members are not bound to support every recommendation made in the Commission's final report. However, the Committee for Sydney endorses all recommendations made in the report.



Since the Commission's inception, there has been a change in the terms of debate around the night-time economy in Sydney. There is now a greater focus on collaboration and consensus. We hope that the work of the Commission has helped, and will continue to help in debates around these issues, and that these debates will drive changes that ensure that Greater Sydney can become a true 24-hour city.



CHAPTER 1 THE POTENTIAL OF THE 24-HOUR ECONOMY IN GREATER SYDNEY

The central focus of the Commission's work has been unashamedly economic. Put simply, we believe that Greater Sydney is losing out economically and financially by having an underperforming night-time economy.

A night-time economy must be seen as more than just a question of entertainment or licensing. It is about creating the amenity of a genuine 24-hour city, where normal day-to-day activities such as shopping, visiting a museum, going to the gym or a public library become as normal at 10pm as they would at 10am.

We believe that there are substantial potential benefits to Sydneysiders having access to 24-hour services and amenities. There is potential for more night-time activities to become a source of jobs and new income for the city, particularly in Western Sydney. There is also an opportunity to revitalise public space and buildings, particularly those that are not used after a certain hour of the day.

The City of Sydney's night-time economy employs around 113,847 people and generates sales turnover of \$19.3bn, making up 27% of total employment and contributing 22% of total turnover.

The Core night-time economy has grown since 2009 with increases in the number of establishments (16%), employment (14%) and sales turnover (28%). Food makes up the majority of the Sydney core night-time economy in terms of establishment numbers (71%), employment (62%) and sales turnover (52%), whilst Entertainment contributes 18%, 22% and 31% respectively.

There is also a key workforce element, particularly for night-time employees. As flexible working becomes more prevalent, the number of employees working outside the traditional hours of 9 to 5 is likely to grow. How does the city cater for these people? What are their options for travelling to and from work at night, particularly using public transport? Can they access services during or after their shift?

We can also further enhance Sydney's tourism offer, by diversifying activities and locations for tourists to

visit at night. In particular, a city that offers late-night or 24-hour transportation, as well as restaurants and shops that open late, is more attractive to those who come to visit.

Our work also builds upon the notable night-time activities already taking place in Greater Sydney. There is an irony in that, whilst there is a perception that Sydney's night-time offer could improve, the city still offers some of the most high-profile evening activities in the world.

The New Year's Eve fireworks are a brilliant combination of creative excellence and logistical skill: over 3 million people venture into the city to watch one of the great New Year shows in the world. Our Lunar New Year festivities are the largest outside Asia¹ and events such as Vivid use the night fantastically, while also bringing in millions of domestic and international visitors every year. Mardi Gras is a Sydney institution, including globally famous night-time parades. Open air activities make use of Sydney's enviable warm climate to stage breathtaking music, theatre and cinema across the city. Our major sporting venues play host to tens of thousands of sports fans watching night-time games.

The City of Parramatta is host to an annual program of vibrant events and festivals. Winter in Parramatta is highlighted with the Winterlight festival, a 17-day event and home to the largest ice-rink in Greater Sydney. The Parramatta Lanes festival in October welcomes over 100,000 visitors to experience four nights of food, art and music across a number of locations in the Parramatta CBD. Summer festival highlights include the 15-hour Australia Day celebrations as well as Tropfest, the world's largest short film festival, the Crescent Summer concert series in Parramatta Park, and the annual Parramasala festival, the largest multicultural festival in Western Sydney and a signature event as part of Multicultural March.

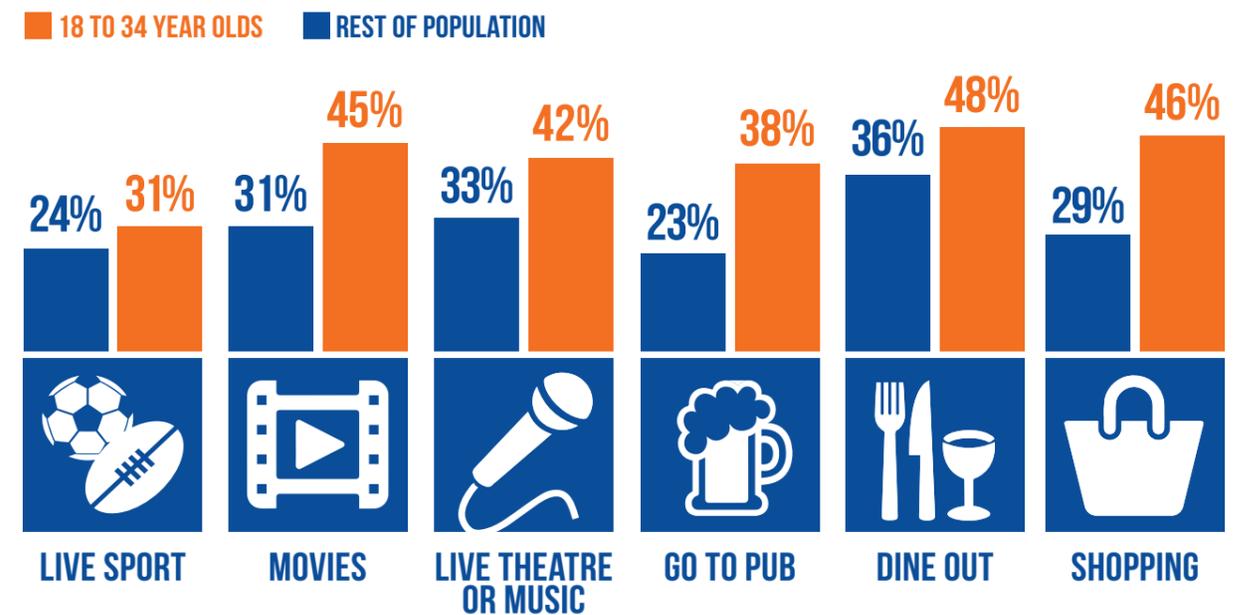
Why then, with so much good going on, should we worry about the night-time offer in Sydney? We do so because we believe that there is significant untapped potential for a more integrated and diverse night-time offer in Sydney. In some areas, regulatory or governance frameworks might not allow this potential to flourish, and more could be done to brand and promote Sydney as a major global night-time city.

The city is currently undergoing major redevelopment and redesign, partly due to the substantial investment being made by the NSW Government into our infrastructure and built environment. George Street in the Sydney CBD is being transformed from a congested conga-line of buses and cars to allow for greater pedestrianised areas, wider footpaths and greater space for outdoor dining and entertainment. Circular Quay will undergo a revamp of its own in the near future, improving transport amenities and retail and entertainment options. Parramatta CBD is also changing, with a new urban centre created at Parramatta Square offering new options for work, study and entertainment.

Greater Sydney is also entering a new era of spatial planning. The Greater Sydney Commission's Draft Regional and District Plans, aligned and coordinated with Transport for NSW's Future Transport Strategy, have the potential to enhance the wider city's accessibility and liveability. Creating vibrant evening precincts must be a key part of this planning, an area that we explore later in the report.

In order to better understand some of the primary issues relating to the night-time economy in Sydney, the Commission undertook polling in partnership with Ipsos. The Commission conducted a survey of 1000 Greater Sydney residents. The data was weighted to ensure it was representative of the greater Sydney population by age and gender. It found that less than half (46%) of people were satisfied with Sydney's night-time leisure and entertainment offering and that there is an appetite for greater diversity of activities, particularly from 18-24 year olds. The results also included an aspiration for more night-time shopping, dining, cultural and sporting options:

With only 46% satisfied with Sydney's current night time offering, there is an appetite for more options



Q: Which of the following activities would you do more of if there were more options available to you at night time across Sydney?

(BASE: ALL RESPONDENTS N = 1,000)

The survey also identified support for more late night public transport options, with over half (51%) of respondents saying that they would stay out later if they had more public transport options.

There is a desire for more late night transport options, which is particularly strong among 18-34s



Half (51%) say they would stay out later if they had 24-hour public transport options.



63% say they would go out more often if they had 24-hour public transport options.



72% would like more late night public transport options.



Mastercard data on global cities

Given the demand for more night-time options in Greater Sydney, the Commission worked with Mastercard to review night-time spending in Sydney and benchmark it against eight other global cities.

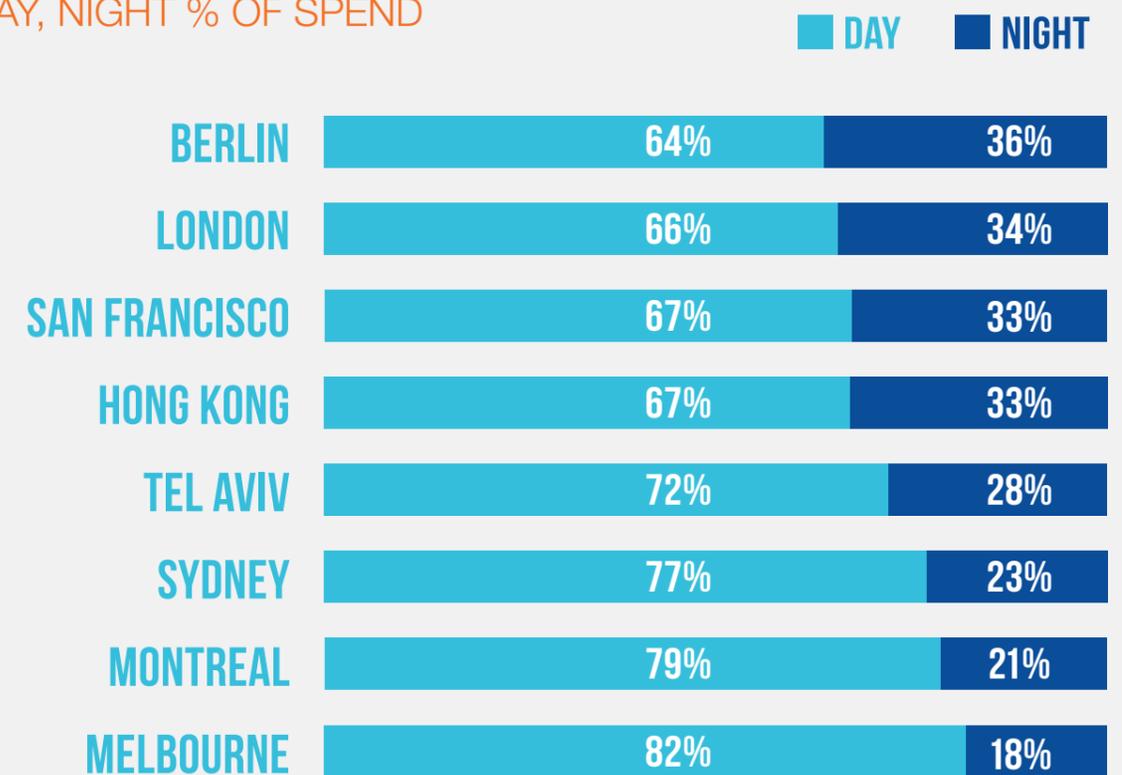
The data relates to the use of Mastercard payments in person, not online, and is not intended to be an exhaustive guide to consumer spending during the night. However, the figures do offer a snapshot of the current state of the night-time economy in Greater Sydney and also identifies where there is additional unmet demand. Key insights include:

- Sydney has room to grow in comparison to other key global cities. 36% of spending in Berlin happened after 6pm compared to 23% in Sydney.
- Sydney's night spend comes predominantly from grocery spending with other 'non-communal'

categories such as finance & communications contributing to its overall spend performance.

- Sydney's 'destination' postcodes for socialising have comparatively strong night time percentage of spend, whereas more suburban areas in the Greater Sydney area bring down the overall percentage significantly.
- There are postcodes in Sydney, within strong performing regions, showing little night spend activity at present, which have potential to grow their night-time economy.
- Whilst Greater Sydney's spend is larger than that of Greater Melbourne, Melbournians spend more at night on restaurants and bars; apparel and general merchandise.

DAY, NIGHT % OF SPEND

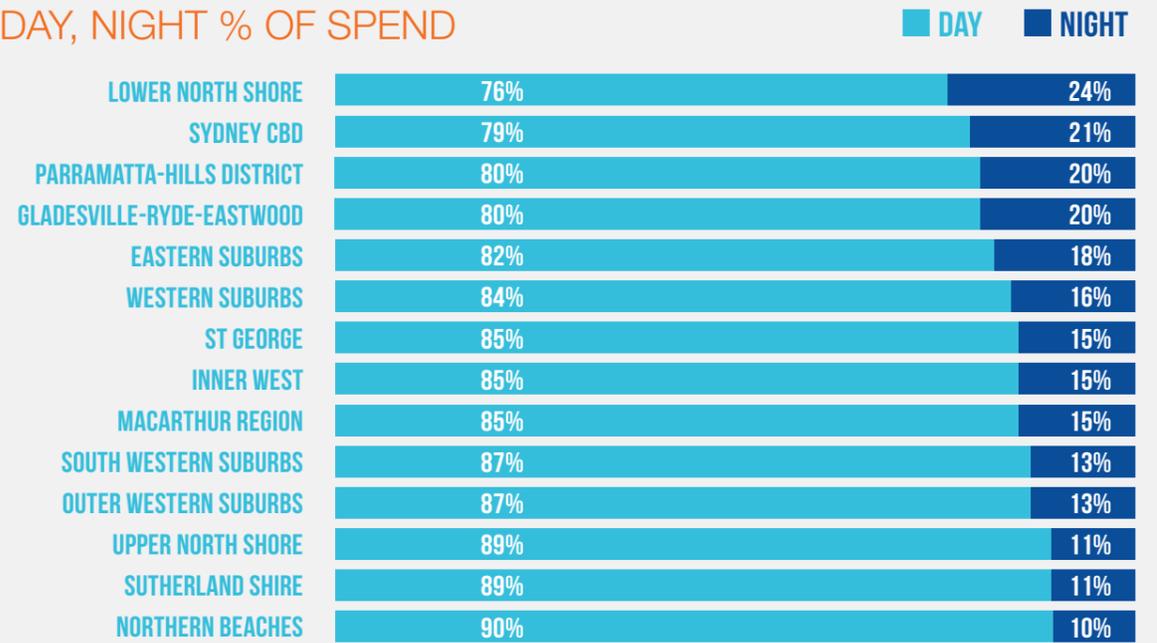


HOW DOES SYDNEY COMPARE TO GLOBAL CITIES?



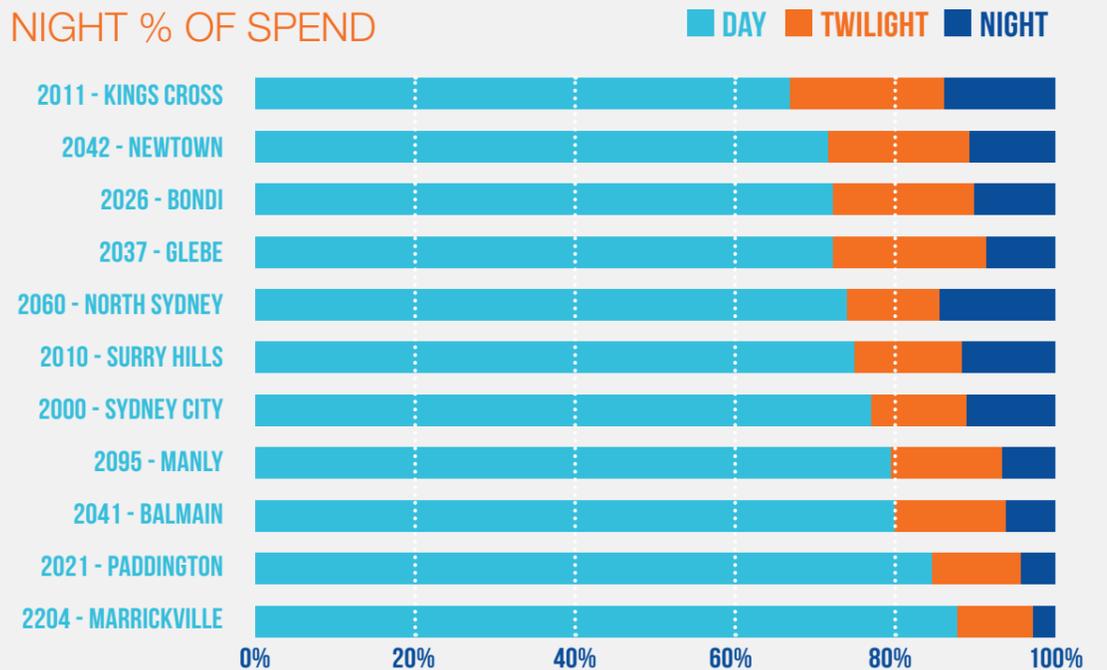
Sydney by region

DAY, NIGHT % OF SPEND

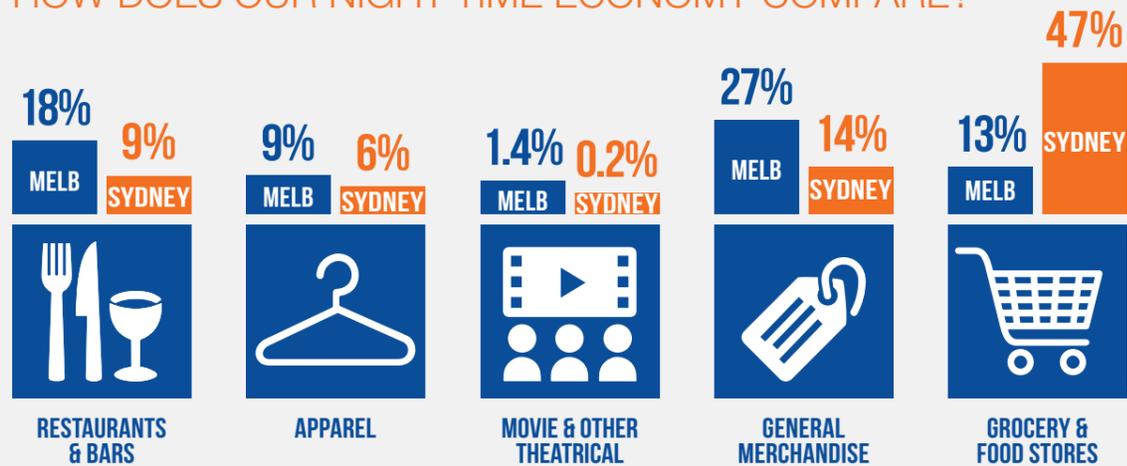


Sydney by postcode

DAY, NIGHT % OF SPEND



SYDNEY VERSUS MELBOURNE HOW DOES OUR NIGHT-TIME ECONOMY COMPARE?





CHAPTER 2 DIVERSITY OF NIGHT- TIME ACTIVITIES

“...the most attractive destinations are those that offer an array of entertainment options for different ages, cultures and lifestyles, including families. This requires private as well as public attractions, and night-time leisure activities not associated to the consumption of alcohol. Tourism is a huge source of revenue and most local governments are looking for new measures to help increase global tourism. By failing to foster a healthy and vibrant late-night entertainment economy, the city jeopardizes its aspirations to become a global city.”

ANDREINA SEJAS,
GLOBAL EXPERT ON
NIGHT-TIME URBAN PLANNING

Truly great global cities offer a wide choice of leisure and entertainment across day and night; with public and private attractions suitable for a range of ages, cultures and lifestyles.

Diverse night-time activation creates a viable transition from day-time to night-time economies, and this economic diversity is critical to fostering a more inclusive and safe night-time environment and attracting a mixture of people. This mixture of users naturally creates a calmer environment on the streets and makes unsociable behaviour seem less acceptable.

Sydney already offers a range of evening activities that don't directly relate to alcohol, including cinemas, theatres, live music, sporting events, festivals, restaurants and cafes. Late-night shopping is sometimes available, although a sizable number of retailers operate the traditional business hours of 9-5. Similarly, many museums, galleries and public amenities close before 5 or 6pm.

In some parts of Sydney after 11pm, 74% of visitors are aged 15-30 years,² and options are often limited to drinking, takeaway food or convenience stores. Typically, only 6% of people in the city after 11pm are over 40 and other options must be provided to attract different demographics.

Greater diversity would also reflect the multiculturalism of Greater Sydney. Areas like Little Korea in Strathfield or the multitude of Indian restaurants in Harris Park, reflect the fact that different community groups will want to engage in different night-time activities. The benefits can also be found throughout the wider community. For example, the Parramasala festival in Parramatta is a free public celebration of the diverse and rich cultures in Sydney's west, including music, dance, parade, theatre, food, film and heritage. It attracts around 30,000 people of which over 70% were born in countries other than Australia.

Diversity of activities and crowds can also often have a clear economic benefit. Nuit Blanche in Toronto generates \$9m and attracts over 800,000 visitors to the city, while the Italian Notte Bianca cost €3 million

to run but generated €30 million.³ Sydney's Vivid Festival is estimated to contribute around \$110m into the state economy.⁴ Hobart's Dark Mofo festival attracted over 400,000 visitors in 2017 and has been described as single-handedly boosting Hobart's mid-winter dead tourist spot.⁵

The Commission has been encouraged by work undertaken by Property NSW, on behalf of NSW Government, to encourage greater diversity of night-time activities across Greater Sydney. This has included:

- Partnering with the Museum of Contemporary Art to activate sites within The Rocks precinct.
- Working with retailers on after hours shopping events.
- Extending The Rocks markets at peak times of the year.
- Partnering with external theatre providers to activate areas within the precinct.
- Providing night-time entertainment over the Christmas period such as bands, carollers and outdoor movies.

Twilight and after dark //

In the growth of a 24-hour economy, it's important to differentiate between the twilight economy (6-9pm) and after dark (9pm onwards). The Commission believes that there is significant scope to expand the twilight economy in Greater Sydney, particularly to make use of a time when public transport is running regularly. In particular, there is greater opportunity for early evening dining and more diverse retail activities, plus more options for families and older people.

THE NORTH SYDNEY TWILIGHT FOOD FAIR

has been in operation since 1990 and is a firm favourite with locals and visitors to the area who bring their families and friends to make the most of Summer evenings and unwind for the weekend. The vibrant, exciting, multicultural outdoor night market features a range of international cuisine, live music and entertainment.

THE INTERNATIONAL CONVENTION CENTRE SYDNEY (ICC SYDNEY)

is providing entertainment options for all ages and interests and helping to boost both visitation and business outcomes. People attending business events are joined by Sydneysiders and interstate travellers in attending performances, dining within the precinct, and enjoying the beautiful waterside surrounds. In 2017, the ICC held 755 events, attracting 1.3 million people to the venue and broader precinct. Through public art and twenty-one digital screens along the boardwalk (and the length of the venue), the venue is both passively and actively engaged with the community into the evening. Delegates at ICC Sydney events generated \$785 million in direct expenditure in 2017.

PARRAMATTA AT NIGHT

In 2008, a Western Sydney University study for City of Parramatta Council noted a disconnect between daytime activities and the night-time economy.⁶ However, since 2008 the city's night-time economy has evolved, and in 2013 was said to be the fastest growing night-time economy in Australia.

City of Parramatta Council suggested the success came from an activation of key areas in the city by providing a more diverse range of experiences including food trucks, row boats by the River and the Parramatta Lanes event. In addition to a large array of restaurants, cafes, eateries and bars open at night, the city hosts Farmers Markets each Friday night and a range of drama and musical events at the Riverside Theatre.

The city also enjoys sporting events throughout the year at Parramatta Stadium as well as annual festivals such as the Sydney Festival, Winterlight Festival, Loy Krathong, New Year's Eve, Australia Day and Lunar New Year. Council reports revenue from the city's night-time economy to be \$909 million.

As we have noted, Sydney has a competitive advantage over many world cities in that its climate allows outdoor evening activities throughout much of the year. We already make use of the warm weather through activities like outdoor cinema, opera on the harbour, food markets, evening horse racing at Randwick and Canterbury and night-time Big Bash cricket at the SCG and Homebush.

However, we have identified two areas that could be improved: retail options and public amenities.

Shopping and services //

At the end of the working day, traffic and public transport hit their peak as people exit the CBD and other employment centres. However, more could be done to encourage people to stay in precincts after work and enjoy twilight activities. Research by the City of Sydney has shown a lack of adequate after-hours pharmacies, grocers, medical centres, gyms and other services, which if available would allow more people to perform 'routine' activities⁷ after work. Night-time workers would also benefit from the availability of services at the beginning or end of a shift. For example, in Sweden, 24-hour childcare services are available to parents working at night.⁸

Late-night retail can particularly capitalise on high-spend but time-poor tourists and business guests. In Adelaide, over 700 retailers operate until 7pm on Thursdays and 9pm on Fridays and the Central Market is also open until 9pm on Fridays.

In many Asian cities, shopping is available until at least 10pm. For example, in Singapore, shopping hours for shopping malls are usually from 10.00am to 10.00pm from Monday to Sunday, and some supermarkets are open twenty-four hours.

Polling also shows that Sydneysiders have a desire to shop after 6pm.⁹

The Commission highlighted proposals from the City of Sydney to encourage later trading retail, allowing retailers to trade later without coming back for council approval. Combined with the Night Time Diversification business support grant, this will encourage later trading retail, create more leisure options and encourage people to remain in the city longer, taking the pressure off of peak transport services.

THE FASHIONABLY LATE FASHION MARKET is held every Thursday evening in Dizengoff Square, Tel Aviv, starting at 4pm and running until around 11pm. The market is sponsored by the Tel Aviv Municipality, who in addition have organised a number of big street parties and events to coincide with the market.

Dining, food trucks and night markets //

In some parts of Greater Sydney, it can be difficult to get a restaurant meal later than 10pm, or even non-alcoholic refreshments after the theatre or cinema. We believe that there is a clear need for greater late-night dining options, particularly offering sit-down casual meals near key attractions and events. More smaller scale venues provide a space to talk, drink and eat in an intimate setting and draw a broader demographic. There is also a desire for more outdoor seating in dining areas to better realise the benefits of Sydney's climate. The city is blessed with weather that allows patrons to sit alfresco late into the night, but the inability to create a Mediterranean-style café culture in Greater Sydney is a great frustration.

The popularity of food trucks is increasing, combining diverse outdoor casual dining with the flexibility of take-away meals. Night markets such as those at Carriageworks, Bondi and Chatswood also work well with a mixed offer for a range of demographics. Activities such as these should have the flexibility to operate in underused spaces in the city, such as laneways and parks.

Cultural institutions //

Late-night opening hours in museums, art galleries and other institutions offers the experience of art and culture in new circumstances to more people, and ensures the city's workers, residents and visitors can engage in a creative and cultural nightlife.

This in an area where the cultural sector is demonstrating great innovation. Some of Sydney's major arts and cultural venues have participated

in a Culture Up Late initiative to open late every Wednesday night during the summer months of January and February. To build on this success, the Commission suggests that institutions continue to examine opportunities to extend evening activities throughout the year, not just the summer months. Late night openings are not unusual in other global cities. For example, the Louvre in Paris, the world's largest museum, is open until 9.45pm on Wednesdays. An additional option could be offering a discounted pass to visit a number of cultural institutions during the evening over a weekly or monthly period.

FIRST THURSDAYS IN LONDON SEE MEDIUM TO SMALLER SCALE ARTS ORGANISATIONS ARRANGE LATE NIGHT OPENINGS AND PROGRAMS

on the first Thursday of the month, typically as an extension of existing programming. The strength of the program is in regular programming and awareness in the community. In particular, the Natural History Museum in London successfully offers diverse late-night activities throughout the year.

SHAKESPEARE'S GLOBE

in London has a long-held tradition of midnight matinees that start at 11.59pm. It's an irreverent atmosphere, and actors often say these performances are among their favourite and most memorable. There's even a special early breakfast at the Swan restaurant after the show.

Public amenities //

With greater retail, dining and cultural options comes an opportunity for opening public amenities at night. The Commission appreciates that there are cost implications to opening services for longer and later,

but we urge state government departments and local councils to review whether there is demand for the later opening of services as part of a broad night-time economy strategy.

The City of Sydney is already investigating the development of Australia's first 24-hour library at Customs House¹⁰ and will increase use of its halls and centres, as well as increase access to public and commercial recreation facilities such as gyms, basketball courts, skate parks and pools.

Public buildings have an important role to play in this. A number of community assets, particularly school buildings, can sometimes be left empty during the evening. These facilities could be used for evening activities such as sports and exercise classes, adult learning, community meetings or practice spaces for arts and culture. NSW Government has made progress in developing schools as community hubs, however we feel there is even greater scope to utilise school space for night-time activities.

Live music //

The Commission identified significant concerns that the live music offer in Sydney is limited, in some cases due to noise restrictions or lack of venues. In particular, it was felt that more could be done in Sydney to encourage live music through temporary programming in public spaces and parks. In addition, concern was raised that the separate processes for liquor licensing and development approvals creates significant uncertainty, as overlapping functions add greatly to cost and time involved in establishing and operating businesses.

With certain planning policies, small-scale venues not in use at night could be utilised to host live music and arts. Government, private and education sector building stock that is under-utilised or in transition could also make a significant contribution to the cultural fabric of the city's independent dramatic arts.

For example, a proposal presented to Sydney's Inner West Council in early 2017 proposed every type of property zoning, excluding residential, to be allowed to be converted into a small-scale arts venue without the need for a development application.¹¹



Policy changes such as these would allow greater growth and diversity in the arts and live music sectors across Sydney precincts. In 2016/17 the South Australian Government introduced a small arts venue category state variation to the National Construction Code as well as exempt development status for low impact entertainment.

As well as cultural and social benefits, live music contributes significantly to the economy; the Live Music Office estimates NSW is the largest contributor to the Australian live music industry at \$3,623m and 23,207 jobs.

Interstate, the live music sector is supported by development funding: Victoria offers a \$12.2m Music Works package while Western Australia offers its \$3m Creative Music Fund. The establishment of a live music community benefit fund in NSW along the lines of the South Australian model is endorsed by the Live Music Office, City of Sydney Live Music and Performance Action Plan with in-principle support from the Australian Hotels Association NSW.



CITY SOUNDS BRISBANE is Australia's largest free live music program, presenting local and touring bands and artists in the Queens Street Mall, Post Office Square, South Bank and other locations around Brisbane each week. During Melbourne Music Week's Live Music Safari, musicians perform across sixteen Melbourne venues unticketed and free of charge.

CREATE NSW AND THE LIVE MUSIC OFFICE'S LIVE AND LOCAL MICRO-MUSIC FESTIVALS showcase local musicians across free family-friendly events. Following hugely successful events in Parramatta, Camden and Wollondilly, the program has now been further expanded in Western Sydney and Regional NSW, with 18 Councils presenting Live and Local Micro Festival events in 2018. It's proved to be a great way of showcasing some of the best local acts on offer and brings together multigenerational groups. The festivals have created new jobs, brought increased custom for local cafes and restaurants and increased footfall and sales for local retailers. For example, the Camden festival brought thousands of people to Argyle Street to see more than 30 local performers.

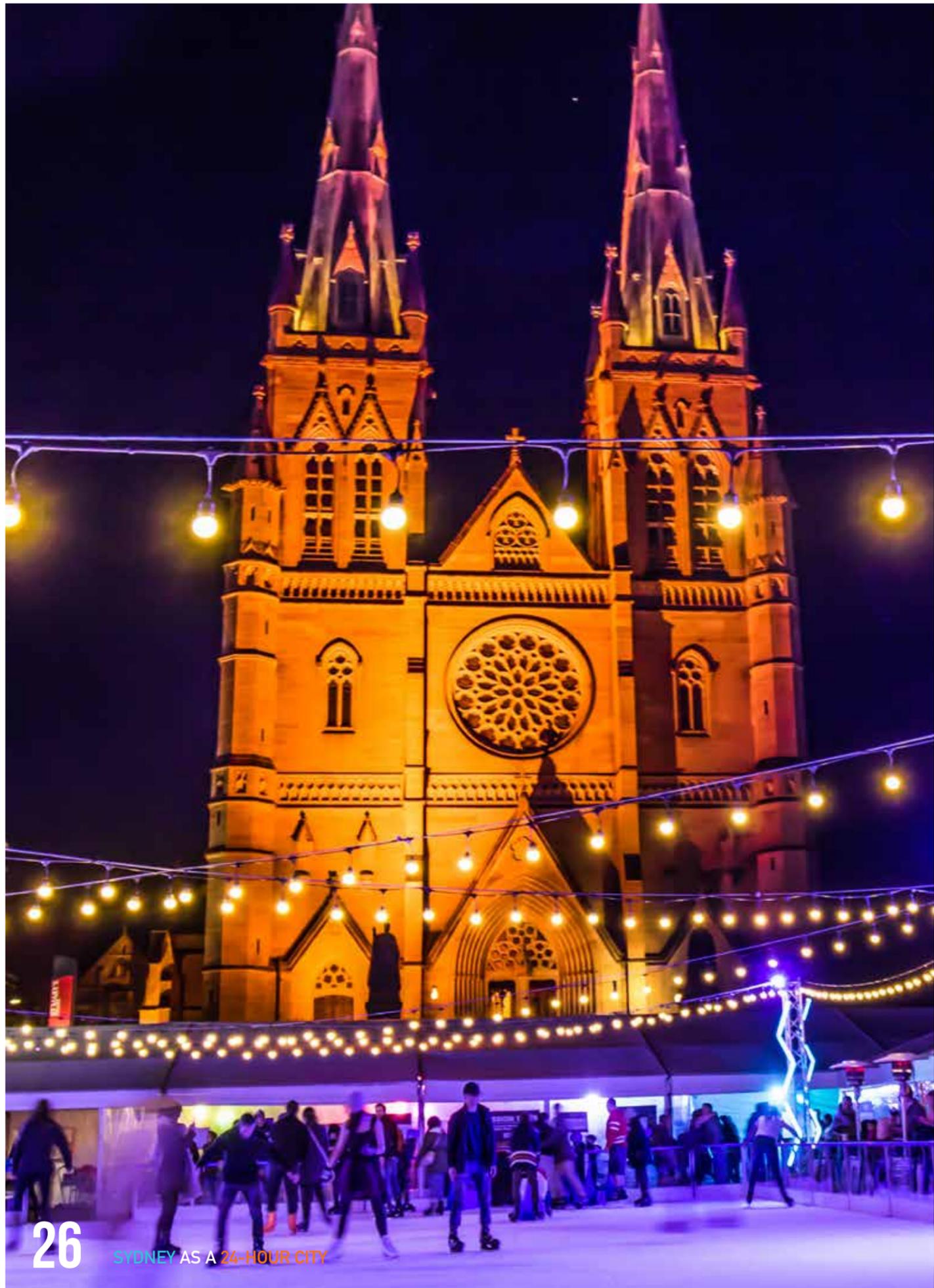
THE DISTRICT CHAMBER OF COMMERCE IN NASHVILLE supports the thriving live music scene in Lower Broadway. The District is a private, non-profit organisation dedicated to economic and community revitalisation of three historic districts and their contiguous areas in downtown Nashville; Broadway, 2nd Avenue/Riverfront and Printers Alley, collectively known as The DISTRICT. Its programs seek to foster and stimulate growth of a district identity, community spirit, civic pride and unity while promoting the people in the area and to further retain downtown Nashville's historic character.

RECOMMENDATIONS

RECOMMENDATIONS FOR EXPANDING THE DIVERSITY OF NIGHT-TIME ACTIVITIES —

- Arts and cultural institutions should build upon the success of Culture Up Late to offer late-night access on certain days, all year round.
- This could also include the development of a 'First Thursdays' style scheme in Greater Sydney for smaller galleries and museums to stay open until at least 9pm.
- Cultural institutions should consider collaborating to offer a discounted pass to visit a number of cultural institutions at night over a weekly or monthly period.
- The property and arts and culture sectors should develop new partnerships to showcase temporary public exhibitions and activate underused land or buildings.
- In major urban centres, late-night shopping should be extended to Friday and Saturday. Councils should allow shops to open until at least 10pm without formal development approval.
- State government departments and councils should review opening hours of services such as libraries and gyms to assess demand for night-time services.





CHAPTER 3 EFFECTIVE GOVERNANCE AND REGULATION



Currently, multiple agencies at state and local level work together in managing aspects of the night-time economy. However, we believe that more can be done to both create a broad vision for the night-time economy in Greater Sydney and to coordinate businesses, governments, residents and other agencies as Sydney's night-time economy develops.

An important starting place would be the formulation of an overarching strategy for the night-time economy, led by the NSW Department for Premier and Cabinet (DPC). The strategy should look at many of the broad and interlocking components discussed in this report, particularly on the potential economic benefits of a 24-hour economy for the city. Key issues would include diversifying the range of night-time activities, particularly during the twilight period; the role of transport and planning; providing more late-night public services and streamlining regulations relating to entertainment and retail. As the public sector agency tasked with ensuring the delivery on the Government's commitments and priorities, DPC is ideally placed to lead this initiative. The strategy could be developed by the existing Economic Policy Group, which examines economic development, infrastructure, planning land use and resources issues.

The NSW Government has established a Night-time Economy Taskforce, led by Create NSW, which includes sixteen NSW Government agencies and the City of Sydney. The Commission notes the important work of the Taskforce and the role of Create NSW in championing the night-time economy within governments, both state and local. However, we feel that a broader strategy led by DPC would help to establish a more whole-of-government approach to the night-time economy.

Whilst an overarching strategy should be a first step, the Commission also recommends establishing a champion — either inside or outside of state government — for the night-time economy in Greater Sydney. In some cities, the model has been the establishment of a Night Mayor or Night Czar. In others, there exists a night-time economy taskforce commission. Sometimes there may simply be a highly

effective individual who is invested with the power and authority to bring parties together to develop a vision and drive towards it. These roles and functions can better foster collaboration, integration and ultimately success in the balanced growth of a night-time economy, as seen in Amsterdam, London, Paris, Toulouse and Zurich.

We are, however, keen that this debate does not become obsessed with structures. There is merit in having a single person tasked with implementing a strategy on the night-time economy, but different models work for different cities. The Commission has, however, identified some following options:

- Appoint an independent Night Czar/Night Mayor/ Advocate for the Night-time Economy, who would report directly to the Premier.
- Create a portfolio of Minister for the Night-time Economy within the NSW Government Cabinet.
- Appoint a Commissioner for the Night-time Economy, in a similar role to the Small Business Commissioner.
- Task a senior public servant in NSW Government with leading the implementation of the NSW Government's night-time economy strategy. This role could be fulfilled by the Secretary or Deputy Secretary at DPC.

Whatever form the role takes, the person tasked with the job must have the ability to shape and coordinate whole-of-government policy on the night-time economy. However, the responsibility must not lie solely with state government. Councils are currently free to establish their own champions for the night-time economy, and a number, including the City of Sydney and City of Parramatta, have produced highly detailed strategies. We encourage councils to go

further and to develop cross-boundary strategies with other councils where they share geographical or economic interests.

The private sector also has a role to play in promoting good governance. We believe that there is merit in the establishment of a NSW Night-time Industries Association, as has been created in Greater London.

SEVERAL CITIES HAVE ESTABLISHED INDEPENDENT CHAMPIONS FOR THE NIGHT-TIME ECONOMY. Amsterdam has a “night mayor”, London a “night czar” and New York City Council has voted to create the Office of Nightlife, which will tackle issues such as improving conditions for nightlife workers, investigating the effects of zoning laws, managing noise and nuisance, and making conditions easier for artists and smaller-scale night businesses.

THE UK NIGHT-TIME INDUSTRIES ASSOCIATION is the voice for the night-time sector and works to increase awareness and understanding of its contribution and benefits. It seeks to influence the decisions of policymakers and ensure that the night-time economy continues to flourish, supporting regeneration, creating jobs and enhancing the UK's international reputation.

Business Improvement Districts //

Several cities have used a ‘Business Improvement District (BID)’ model, a public-private partnership often involving councils and businesses in a local authority area. Private sector members can contribute a special tax or levy to cover the expense of providing their BID with services beyond what the local government offers in their area. The legalities of forming a BID vary but can be created simply by the approval by a majority of local business and property owners, by those who control a majority of the land area, or by owners responsible for the majority of

the fees assessed. BIDs can encompass economic, business, local, political and social elements of a place and strategically bring them together to build revenue to support an area's different aspects — such as aesthetics, security and commerce. They are developed, managed, financed and delivered locally.

We suggest that councils in Greater Sydney should pilot at least three ‘Night-time Business Improvement Districts’ as a genuine partnership between councils and local businesses involved in the 24-hour economy.

Penalty rates //

One area identified as a barrier to late-night retail is the penalty rates associated with ‘after-hours’ trading. The cost associated with providing services at night is obviously a key issue when creating a vibrant night-time economy. The issue has been examined as part of a review by the Fair Work Commission, which has found that a reduction in Sunday and Public Holiday penalty rates would allow retailers to extend trading hours. The Australian Retailers Association has also argued that a reduction in penalty rates would reduce the strain on retailers and increase trading hours.

The Commission feels that it is too early to judge whether the reduction in penalty rates over this period will have a marked change on retail behaviour but do believe that extending trading hours will have a decisive impact on creating a more enhanced 24-hour economy. In the lead-up to Christmas 2017, the recently pedestrianised areas of George Street between King and Market Street were full of crowds taking advantage of late-night shopping in the area. It offered a glimpse of what might be possible once the Light Rail is running on George Street and the great opportunities for late-night activities in the CBD and other centres.

Licensing //

The regulation of licensed premises at night has been a subject of considerable debate, both within the Commission and more broadly. Much of this debate has centred around the continued use of lockout law restrictions in Kings Cross, Darlinghurst, Cockle Bay, The Rocks and Haymarket. Lockout laws are not unique to Sydney and indeed similar arrangements are in place in other areas of NSW, as well as parts of Queensland and Western Australia.

The lockout laws are an important part — but by no means the only important part — in our discussion about Sydney as a 24-hour city. The Commission examined international evidence but found that it is too ambiguous to prove either way that ‘lockout law’ style regulations significantly reduce alcohol-related disorder over a broad geographical area (as opposed to the defined areas to which they apply), and while there are suggestions that extended late-night trading hours lead to increased alcohol consumption and related harms, research is inconclusive on the effectiveness of ‘lockouts’ as a sole measure.

However, a cross-section of stakeholders involved in the Commission noted frustration at the inflexibility of liquor regulations, particularly for live entertainment venues. Moreover, the Commission believes that it is fair to conclude that the lockout laws have contributed to perception that the vibrancy of the night-time offer in Sydney has declined and, as a result, the reputation of Sydney as a global city has been detrimentally impacted.

NSW Police have highlighted the substantial decline (almost 50%) in alcohol-related assaults in the defined lockout areas since the laws were introduced. This figure has been contrasted with a 17% rise in assaults in suburbs such as Newtown, Bondi and Double Bay and a 12% increase in assaults in areas such as Pyrmont. Concern has also been raised about the impact on businesses within the lock out areas. The Kings Cross Liquor Accord estimates that at least 16 licensed premises have closed in the lock out area since the laws were introduced and the Sydney Business Chamber have described the laws as “heavy handed”.

Whilst there is disagreement on both sides of the argument, the NSW Government has attempted to bring consensus to the debate. An independent review into the impact of liquor law reforms was conducted by the Hon. Ian Callinan AC, which looked at how to reduce alcohol-related violence while maintaining the vibrancy of Sydney’s precincts. Following this, in December 2016, the NSW Government announced a range of changes to liquor laws, including exemptions to the 1.30am lockout and 3am last drinks for live entertainment venues. At least 23 venues have already applied for later lockouts and last drinks.

The Callinan Review has been enormously helpful to the Commission’s work. It does note a reduction in visitor numbers in the lockout law areas and that “the contribution that they previously made to the night-time economy may have been reduced”, including the loss of some jobs. It also highlights that similar lockout laws have been introduced in other cities in Australia.

The Commission supports the direction of travel led by the Government following the Callinan Review. Relaxations have been welcomed and we urge the government to continue to monitor the number of businesses and visitors to the area. However, in the view of the Commission, the status quo is not sustainable. The vibrancy of the lockout areas, in particular Kings Cross, has been diluted and we are concerned about the long-term impact on Sydney’s reputation as a global city.

The Commission is grateful to NSW Police for their engagement with our work. It should be noted and reflected on that frontline police put themselves in harm’s way every day to keep the public safe, often from individuals under the influence of alcohol and/or drugs. Cities across the world face the challenge of dealing with the effects and impacts of public drunkenness. On this, Sydney is no different. However, we believe that there are lessons to learn from other cities in creating safer areas for the public to enjoy night-time activities responsibly.

Planned Districts //

As we have highlighted earlier in this paper, a diversity of night-time options is important to create areas that are not necessarily focused on the consumption of alcohol. However, we must also recognise that alcohol is often an important component of night-time activities. We therefore suggest the consideration of replicating Amsterdam-style ‘planned districts’ for areas where significant alcohol consumption may be available.

Amsterdam has introduced planned districts, which include 24-hour licenses that allow a number of clubs located away from residential areas to operate at any time day or night. In more densely populated neighbourhoods where bars mingle with apartment buildings, trained social workers are paid to help keep the peace. Called Square Hosts, they encourage patrons to take loud voices inside and defuse

potential conflicts before the police have to be called in — a move that can escalate tensions and create the perception of nightlife causing trouble.

Amsterdam has also spearheaded nightlife-specific business improvement districts, such as the busy downtown plaza Rembrandtplein, where bar owners are required to pay into a fund to support branding, signage, Square Hosts and “designing out crime” improvements like back alley lighting.

Amsterdam has also countered binge-drinking by banning ‘happy hours’, preventing operators selling more alcohol in a shorter space of time. The city also offered 24-hour licences that venue operators could pitch for, but under strict rules. Venues had to be outside the city centre and had to be multi-use, offering a restaurant, bar, theatre and gallery, as well as a club. The reforms have seen 25% decline of alcohol related violence in the city centre over the past five years.

The Commission also believes that there is merit in the “Newtown model”, which demonstrates what can be achieved when local publicans work together with stakeholders on issues in their own areas.

In mid-2015, the Newtown entertainment precinct became a target for various elements of the media and others with claims crowd numbers, assaults and anti-social behaviour was rising in the area. Some politicians and commentators suggested spreading lockout conditions to the precinct Hoteliers and the Newtown Liquor Accord worked with police and stakeholders to develop a localised solution. The cornerstone of the strategy was “no new patrons after 3.00am” on Friday and Saturday nights.

Apart from the “No new patrons” concept, the six-month trial included restrictions of certain drink types (including no shots) after 12.00am, the cease service of alcohol 30 minutes prior to close, a patron code of conduct and the adoption of NSW Police Force Crime Scene Preservation Guidelines.

The initiative was welcomed by the local community, the liquor regulator and by NSW Deputy Premier Troy Grant who congratulated the venues in State Parliament; “This is the sort of leadership we want to see in local areas through local liquor accords — local solutions to local problems ... It is a great example of local people, who know their areas best, looking at the needs of their community and responding accordingly.”

Bureau of Crime Statistics and Research (BOCSAR) crime statistics have showed that in the twelve months to 30 June 2016, the number of non-domestic assaults occurring on licensed premises in Newtown reduced by 56.9%, from fifty-eight to twenty-five, the lowest level in more than eight years, made even more impressive by the reported increase in the number of people coming to Newtown. Interestingly, in that same period, the number of assaults on licensed premises in the suburb of Sydney increased by 26%. Assaults on licensed premises in Newtown remain at levels comparable to those before the implementation of the Kings Cross and Sydney CBD lockouts.

The Commission also supports moves by the City of Parramatta, City of Sydney and other councils to promote the expansion of small bars. We urge NSW Government to examine the work undertaken by the South Australian Government and Adelaide City Council to promote small bars in the Peel Street precinct. Evidence suggests that this has helped to bring a more diverse audience to the CBD and foster a more mature drinking culture by promoting cultural activities and food instead of binge drinking.

It should also be recognised that NSW Government has taken action to support small bars in Greater Sydney. In December 2016, the Government increased the patron capacity of small bars from 60 to 100 to support their viability. Further changes extended the trading times for small bars in the CBD and Kings Cross precincts from midnight until 2am, in line with the rest of NSW. Small bars seeking to trade later can still apply for extended trading up until 5am. In addition, the Government has also removed blanket drinks restrictions applying to small bars in the precincts. These reforms support small bars in meeting the demand for sophisticated, diverse night-time entertainment, and recognise that these smaller venues typically have lower rates of violence and fewer compliance issues.

The Commission also recognises the importance of pubs and bars in helping to shape the night-time economy. We also recognise that venues such as these are often at the forefront of combatting anti-social behaviour related to alcohol consumption and play a key role in promoting responsible consumption of alcohol. In addition, pubs often play a central role and function within local communities. The Commission noted concern from a number of



members regarding the number of pubs closing across Greater Sydney and the impact this could have on local culture, community and the economy.

Melbourne's approach to the night-time economy is also worth studying. The city has gone full circle in removing a six-month trial of lock-out style laws and embracing a 24-hour culture, including late-night transport, supported by a geographic dispersal of night-time activities. The result has seen alcohol sales in the City of Melbourne drop, but overall money spent increase, as patrons increased spending on food and entertainment. The 2015 Australian Night Time Economy Report demonstrated a 4.8% increase in food sales and a 4.7% decrease in sales of alcohol between 2009 and 2015 in the City of Melbourne.

While there are differences between Melbourne and Sydney's lockouts, such as last drinks restrictions in Sydney, a major part of this change is down to the city embracing a diversity of activities that don't necessarily involve alcohol. This has included cultural events, sporting matches, extended shopping hours, later food service, whilst also increasing safety provisions and improving public transport options. This example of proactively promoting the night-time economy should be a template for Sydney.

RECOMMENDATIONS

RECOMMENDATIONS ON EFFECTIVE GOVERNANCE AND REGULATION

- NSW Department for Premier and Cabinet should lead the development of a night-time economy strategy for Greater Sydney.
- NSW Government should introduce a coordinating figure to bring together different agencies and actors in the night-time economy. Options include a 'Night Czar/Mayor' or Minister for the Night-Time Economy.
- There should be ongoing evaluation by NSW Government into the impact of 'relaxations' of the lockout laws in Sydney's night-time precincts following the recent law changes, prompted by the Callinan Review.
- NSW Government should examine the introduction of Amsterdam-style 'planned districts' for areas with dense and diverse night-time activities, such as Kings Cross. A voluntary, community-led approach, such as implemented in Newtown, is also a model worth considering.
- Businesses that are participants in the night-time economy should establish a Night-time Industries Association in NSW to drive coordination and collaboration and ensure that business has strong voice in this policy area.



CHAPTER 4 AN INTEGRATED APPROACH TO PLANNING AND TRANSPORT

Strategic spatial planning and place-making are both central to the development of a successful night-time economy. Precincts must be planned to include access to public transport, public amenities, shops and services and leisure activities at night. The ability to travel conveniently between different night-time districts can also support the vibrancy of an area.

The Greater Sydney Commission's Draft Regional and District Plans, aligned with Transport for NSW's Draft Future Transport Plan, have established a strategic vision for place-making across Greater Sydney over the next forty years. A key component of this vision must be to ensure that new and existing districts have access to a diversity of night-time activities.

The most successful night-time cities have excellent functional and aesthetic design, making public spaces and streets attractive and interesting, and encouraging exploration. Design must aim to positively influence certain behaviours, as well as balance infrastructure, street frontages and space management. To achieve this there must be a considered approach to strategic planning and design.

Night-time activation creates an opportunity to revitalise urban areas that become deserted at night. For instance, by organising food festivals along with restaurants and bars in the city centre, cities can retain more people in these commercial areas, reducing the number of commuters that return home directly after work. This not only results in greater revenue for these businesses but also helps to alleviate rush hour congestion.

Research has demonstrated that Sydneysiders would like a city after dark that is well activated, desirable to walk in, and not just well-designed for night but also creatively and beautifully designed.¹² Public spaces in the city at night are defined by the way they are physically arranged, the activities around them, the people in them and the way in which they are managed.¹³ These elements are a result of the 'environmental backcloth' of street layout, building design, interaction with the built environment, the reputation of the space and locations of businesses.¹⁴ The form and balance of these elements shape public spaces as well as guiding behaviour.

The Commission has noted enthusiasm from parts of the property sector to explore the use of underutilised buildings during the evening. An example might be for the empty foyer of an office building to be used as gallery or exhibition space for a cultural institution during the evening. The Committee for Sydney is establishing a working group to explore potential partnership arrangements between property owners/landlords and the arts and culture sector to develop these ideas further.

ALTSPC IS A SYDNEY-BASED ONLINE RESOURCE THAT PUTS UNUSED OR VACANT SPACE TO BETTER USE by connecting it with freelancers, start-ups and small to medium businesses that need it. The platform aims to help businesses reach a goal of 90% utilisation. For example, a local café open between 6am–4pm on Monday to Saturday can allow an emerging chef to launch a pop-up restaurant in the evenings and play host to a craft market each Sunday.

IN 2017, THE SYDNEY FRINGE FESTIVAL partnered with the Hailiang Property Group to create a Fringe Festival hub in the former FedEx Warehouse Complex on Euston Road, Alexandria. The 7000 sqm space, dubbed the "HPG Festival Hub" house, fostered a month of activities as part of the annual Fringe Festival.

Lighting //

Urban lighting can create vibrant, prosperous, safe and inclusive places at all hours. It serves as more than a functional add-on and can enhance the experience of a space as well as encourage social interaction. Responsive lighting sees change based on timing and usage patterns and can be sensitive to the behaviour of people and changes in the environment. Lighting can impact health and wellbeing, feelings of safety, movement and social behaviour.

ARUP'S COLLABORATION WITH BURNS + NICE FOR THE LIGHTING AND URBAN DESIGN REGENERATION OF LEICESTER SQUARE GARDEN IN LONDON sought to breathe new life into its night-time environment. New lighting features were installed to increase visibility on pathways, create visual excitement, improve contrast and create an overall more inclusive experience. A comparison of pre- and post-redesign analysis has shown a more evenly spread occupancy of the space, improved movement patterns throughout the square, and greater use of space after dark.

BRUUMRUUM BY ARTEC3 STUDIO AND DAVID TORRENTS, IS AN INTUITIVE, INTERACTIVE LIGHTING INSTALLATION AT THE PLAZA DE GLORIES IN BARCELONA, CREATING A DIALOGUE BETWEEN PEOPLE AND THE PUBLIC SPACE. Sensors respond to ambient noise and the sounds of passers-by. The lighting elements change colour in response. This is an example of social light and sound interaction, where the square takes on a human quality by reacting to sounds of the city. The sensors capture and integrate the sounds caused by pedestrians and vehicles passing through. The lighting installation transforms a standard plaza by day into an engaging public space at night.

Cities such as Paris and Hong Kong incorporate beautiful lighting displays into the regular experience of the city, which can also affect feelings of safety and security in public areas. Night-time public light displays can also draw in diverse audiences. For example, Singapore's Marina Bay stages a free outdoor light and music show between 8.00pm and 11.30pm every evening, which is supplemented by food markets and late-night shopping. The Sydney Opera House has introduced Badu Gili, a free, all-year-round light installation that takes place at sunset and 9pm, which celebrates the rich history and contemporary vibrancy of Australia's First Nations culture.

IN RESPONSE TO GROWING DEMAND FOR ACCESSIBLE NIGHT TIME ACTIVITIES, IN JUNE 2017 THE SYDNEY OPERA HOUSE LAUNCHED BADU GILI — 'WATER LIGHT' in the language of the site's traditional custodians, the Gadigal people — a new year-round experience that lights the eastern Bennelong sails every evening to celebrate Australia's First Nations cultures. The experience has proved popular, with about 550 people attending each night. More than 40% of attendees surveyed at the event cited Badu Gili as the reason for their visit.

Urbanisation and residential impact //

The presence of residents can help 'normalise' an area with activities that may not include activities related to alcohol.¹⁵ However, in some areas, the urbanisation of the business centre is having an increasingly restrictive effect on night-time activities. In Sydney, there is concern over the number of hotels, pubs and live music venues closing after being sold for property redevelopment, although developers and cultural institutions are undertaking some radical use of dormant spaces.

For the success of a 24-hour economy, we must reach the delicate balance between residents and night-time activities. This may include capping

growth in areas of saturation while encouraging growth in others, particularly of non-alcohol-led attractions. Better planning of venues plays a role; for example, noise management measures by the Greater London Authority include acoustic glazing, sound limiters, acoustically treated ventilation, an 'acoustic lobby' at entry/exit points, banning external amplified music, restrictions in late trading for outdoor areas and setting a maximum noise level.¹⁶ The Commission recommends examining the usefulness of similar measures in relevant districts across Greater Sydney.

The planning of districts has the added benefit of dispersing night-time activities to avoid overconcentration in a given locality. Where a concentration of venues occurs, an area becomes a night-time hotspot and as it grows in popularity will eventually attract large crowds. If not managed, this can create an environment which exacerbates issues such as crime and antisocial behaviour.¹⁷ For example, Melbourne has enjoyed a reputation as the nation's culture capital and its night-time economy is supported by a planning framework that encourages dispersal, opposes overconcentration and considers the cumulative impact of night-time activities.¹⁸

PENRITH PROGRESSION identified the creation of an evening economy as an important element in the revitalisation of the Penrith City Centre. A night-time (or evening) economy is driven by businesses that offer dining or entertainment activities after sunset. Economic planning consultants Urbis Pty Ltd worked with Council to find out how the night-time economy works in Penrith; how big it is and what changes could be made to make it better.

The resulting Night-Time Economy Strategy was commended at the 2016 Planning Institute of Australia (PIA) NSW Awards for Planning Excellence, in the Public Engagement and Community Planning category. The judges were impressed with Council's "bottom up approach", where "no aspect...was spared review" and as a result, "the breadth of strategies was commendable".

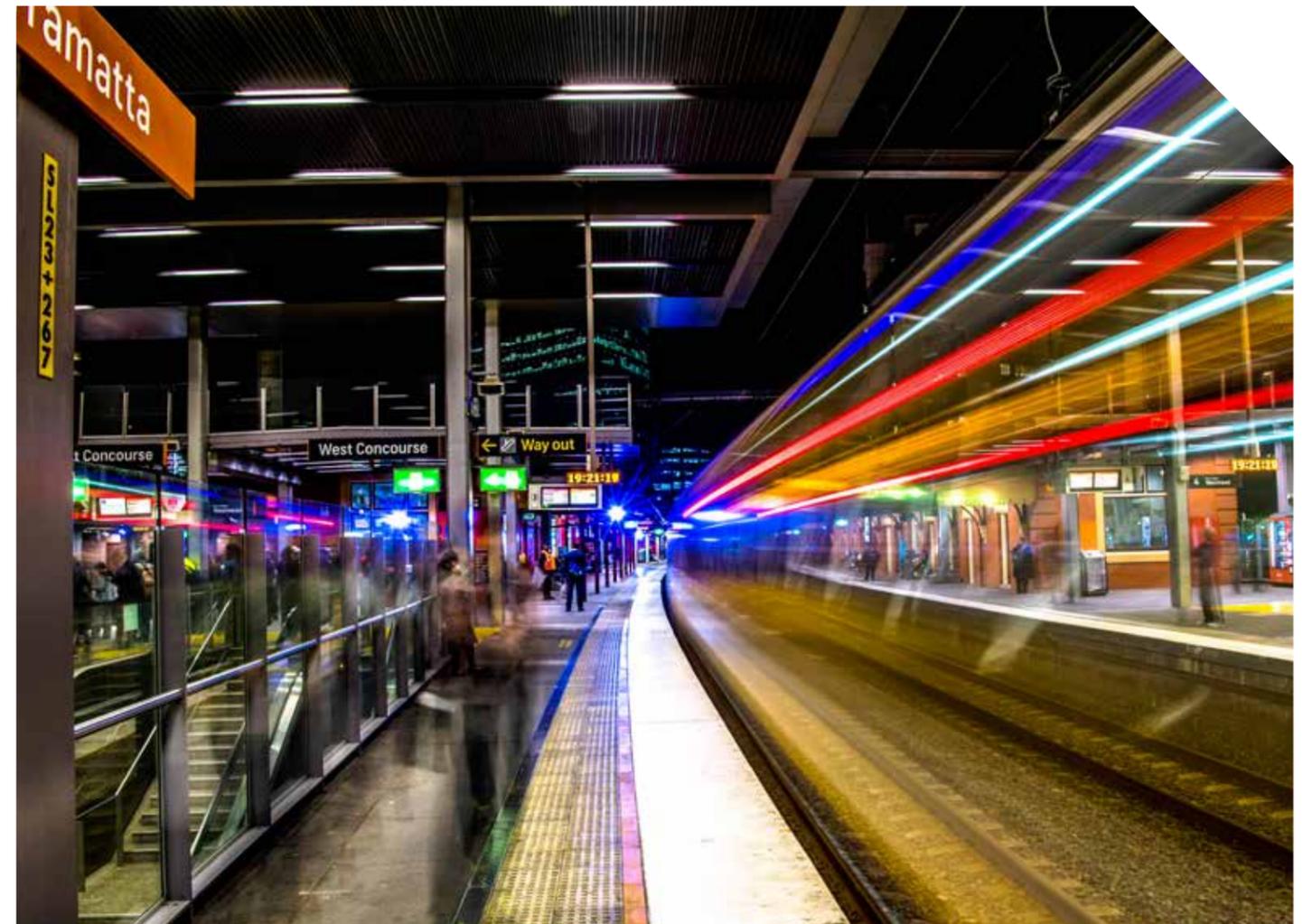
The neon grid //

The Commission supports the establishment of a neon grid, a series of identified entertainment precincts across the city, connected by an efficient and accessible late-night transportation system.¹⁹ It requires an intelligent strategy to amplify existing locations, and identify new ones, for cultural activities, night markets, restaurants, cafes, bars, public spaces and events.

An accessible, effective neon grid could encourage greater movement across Sydney and activate a greater proportion of Greater Sydney rather than intensifying night-time hotspots. It could help to improve crowd control and traffic congestion, filter noise issues and anti-social behaviour as well as encouraging exploration of new places. A good example of opportunities for the neon grid is along Sydney's expanding light rail network, and further development can be encouraged through legislation as well as 'street deals' among groups of local businesses and councils.

IN 2010, THE NEW YORK CITY DEPARTMENT OF DESIGN AND CONSTRUCTION AND THE NEW YORK CITY DEPARTMENT OF TRANSPORTATION

led a redesign of public spaces in Times Square. While the site had long been an icon for entertainment, culture and urban life, the physical and operational conditions of the streets, sidewalks and sub-surface infrastructure such as sewers, had deteriorated over time, detracting from the functionality and safety of this critical crossroads. The redesign doubled the amount of public space and included a new plaza on Broadway that radically carves out 2.5 acres of pedestrian-only space at Manhattan's core, transforming a congested vehicular district in a congested thoroughfare into a new and vibrant space.



The role of transport in the night-time economy //

Providing efficient, safe and accessible transport links is critical to the success of a night-time economy. Reliable night-time transport options support the economy by creating better links to local business activity; enhancing the amenity of public spaces and improving safety by offering convenient options at the end of a night out.

In October 2017 Transport for NSW released the Future Transport 2056 draft strategy and draft Tourism and Transport Plan, providing a blueprint for service improvements. The draft Tourism and Transport Plan includes a commitment to enhance

night-time transport and expanding overnight public transport services to better support customer travel needs.

Despite this, a number of Commission respondents noted that Sydney's 24-hour economy is not always well serviced by public transport and that there can be a lack of access to regular and convenient public transport at night, particularly after midnight and in areas such as Western Sydney.

Accessibility was cited as the second most important concern for residents and workers in the City of Parramatta in their ability to actively be involved in the night-time economy.

Public transport //

Most trains in Greater Sydney end at around 1am and NightRide bus services are sometimes not frequent enough to meet crowd demands. Research by Ipsos Mori showed half of respondents would stay out later if they had 24-hour public transport options; including 72% of young people and 56% of those who live within 10km of the CBD. Almost half (45%) said they would go out more often if they had 24-hour public transport options.

Only 47% of patrons in Sydney's entertainment precincts currently take a bus or train inbound; only 38% take a bus or train home; and only 29% take a bus or train between precincts. Up to a quarter of people going out at night in Surry Hills, Glebe, the CBD, Pyrmont and Newtown identify better transport as a factor likely to improve the night-time economy. Similarly, 97% of visitors to Parramatta, Harris Park and Epping have noted the importance of getting to and from the area as key to deciding where to visit at night for leisure.

THE NIGHT NETWORK IS MELBOURNE'S WEEKEND OVERNIGHT PUBLIC TRANSPORT SYSTEM, which commenced operation on 1 January 2016 for a 12-month trial, later made permanent in April 2017. It is operated by Public Transport Victoria.

In the first year it was estimated that 2 million additional trips took place on the network, at a cost of around \$50m per year. It is estimated that more than 20% of the people using Night Network are shift workers.

TRANSPORT FOR LONDON HAS INTRODUCED A 24-HOUR SERVICE ON PARTS OF ITS UNDERGROUND NETWORK ON IN 2017.

Independent research into the economic benefits of the Night Tube has found that the new service boosts jobs and helps maintain London's status as a vibrant and exciting place to live, work and visit.

The Night Tube has cut night-time journeys by an average of twenty minutes, with some cut by more than an hour. It plays a vital role in opening London's night-time economy, supporting almost 2,000 permanent jobs and boosting the economy by £360m.

Demand for a 24-hour Tube service is clear — late night Tube use has increased at double the rate of day-time trips and Night bus usage has risen by 173% since 2000. There are already over half a million users of the Tube after 10pm on Fridays and Saturdays.

Taxis //

Transport by taxi in Sydney was also raised as an issue, where 23% of people said they would use a taxi to get home after a night out but only 20% of those aged 45 and over were satisfied with taxi availability. The 3am taxi changeover is frequently identified as an issue, as well as late-night congestion at designated taxi ranks causing frustration, fights and other anti-social behaviour.

Surveys conducted in 2011 showed that CBD visitors were concerned about safety around taxi ranks. In response, Transport for NSW has made significant improvements by establishing night-time secure taxi ranks at busy locations. Security guards are on duty to ensure that the environment is safe for both customers and drivers.

Since 2015 new Super Taxi Ranks were introduced at Bathurst Street near George Street and Pitt Street near Martin Place. New Secure Taxi Ranks have also been introduced at Sussex Street near Argyle Street in the Rocks, Goulburn Street near George Street and Pitt Street north of Bridge Street. There are now eleven secure taxi ranks operating in the Sydney CBD.

Secure and Super ranks have CCTV and security as well as an extended number of spaces. Transport for NSW works with partners including taxi operators, venue managers, local government, Roads and Maritime Services and NSW Police to ensure that ranks are managed safely and effectively.

Ride-sharing //

The rise of technology-enabled transport, including the growth of ridesharing, is changing night-time transport and has the potential to complement public transport infrastructure by extending the reach of existing transit systems. More people in Sydney are using Uber and other ridesharing services as a connection to public transport hubs. One in ten Uber trips are already being used by public transport commuters, beginning or ending within 200m of a public transport station.

The Commission would like to see further exploration on the issue of safe pick-up and drop-offs in busy night-time precincts (particularly the CBD and popular inner-city areas).

Poor pick-up and drop-off experience can occur due to the combination of road-works, bus lanes and 'No Stopping' areas. An alternative might be to replace some of the 'No Stopping' zones in the CBD to '5 minute parking' zones so riders can enter and exit vehicles safely.

Transport on demand //

There is also great potential to serve night-time activities with state-provided transport on-demand. Transport for NSW has trialled the use of on-demand buses which allow customers to book transport from or near their home to a local transport hub or other centres. This type of service could provide an alternative and affordable transport option, particularly late at night, when regular public transport options might be less frequent.

Safety is an important factor in night-time transport. Measures seen to be effective in increasing transport use and safety include street lighting, CCTV cameras and security staff to manage queues and assist customers. The City of Parramatta has been an exemplar in actively improving the safety and perception of safety within its LGA. Innovations have included an upgrade to CCTV networks, better lighting via multi-functional poles, high visibility policing at night and streetscape upgrades.

IN OCTOBER 2017 TfNSW BEGAN A TRIAL OF ON DEMAND TRANSPORT SERVICES. This involves piloting services at eight new locations, including some which operate until midnight.

On Demand provides a flexible alternative transport service, which allows you to book a vehicle to pick you up from home or a nearby convenient location and take you to or from a local transport hub, shopping centre, business park or hospital.

The new services are part of a NSW Government trial of flexible public transport which will make services available when and where people need them and improve connectivity to the existing public transport network.

Private vehicle access and parking is also important in attracting key demographic groups required to achieve diversity in night-time precincts, for example families, older citizens and disabled people. Parking must be safe, secure, convenient and appropriately priced, however increasingly cars are not a solution for public spaces and therefore the pickup and drop-off experience for point-to-point transport users, as well as public transport options, must also be improved.

As the night-time economy continues to grow, so will the workforce servicing it. Night-time workers tend to fit a particular demographic profile, in lower paid jobs and living further from their workplace, adding to the burden of travel cost and time. Currently, workers finishing shifts late at night or early in the morning can have few public transport options, face longer waits, more changes and longer journeys.

Efficient, affordable transport is critical for these workers to quickly and safely commute to and from work, and 24-hour transport options are essential in attracting new workers to night-time precincts. We therefore encourage Transport for NSW to pilot extra public transport services in major night-time districts.



Freight //

As space within the CBD becomes in greater demand, particularly during peak travel times, there is an opportunity to use the quieter night-time to move transit goods by road. Traffic congestion is likely to be lighter in the CBD during the night-time period of midnight to 6am, meaning that deliveries could be made more efficiently.

City centres across Greater Sydney can learn from trials in progress in Sydney's CBD. To help ease congestion during the CBD's transformation, Transport for NSW is already working with transport, logistics and delivery businesses to investigate changing the way they do deliveries. On-street parking space, including loading zones, has decreased and will not return to previous levels, so delivery companies are being encouraged to make deliveries outside peak periods. This can improve delivery efficiency and productivity, as well as enable CBD businesses to focus on customer service rather than managing deliveries during peak times.

24-hour transport //

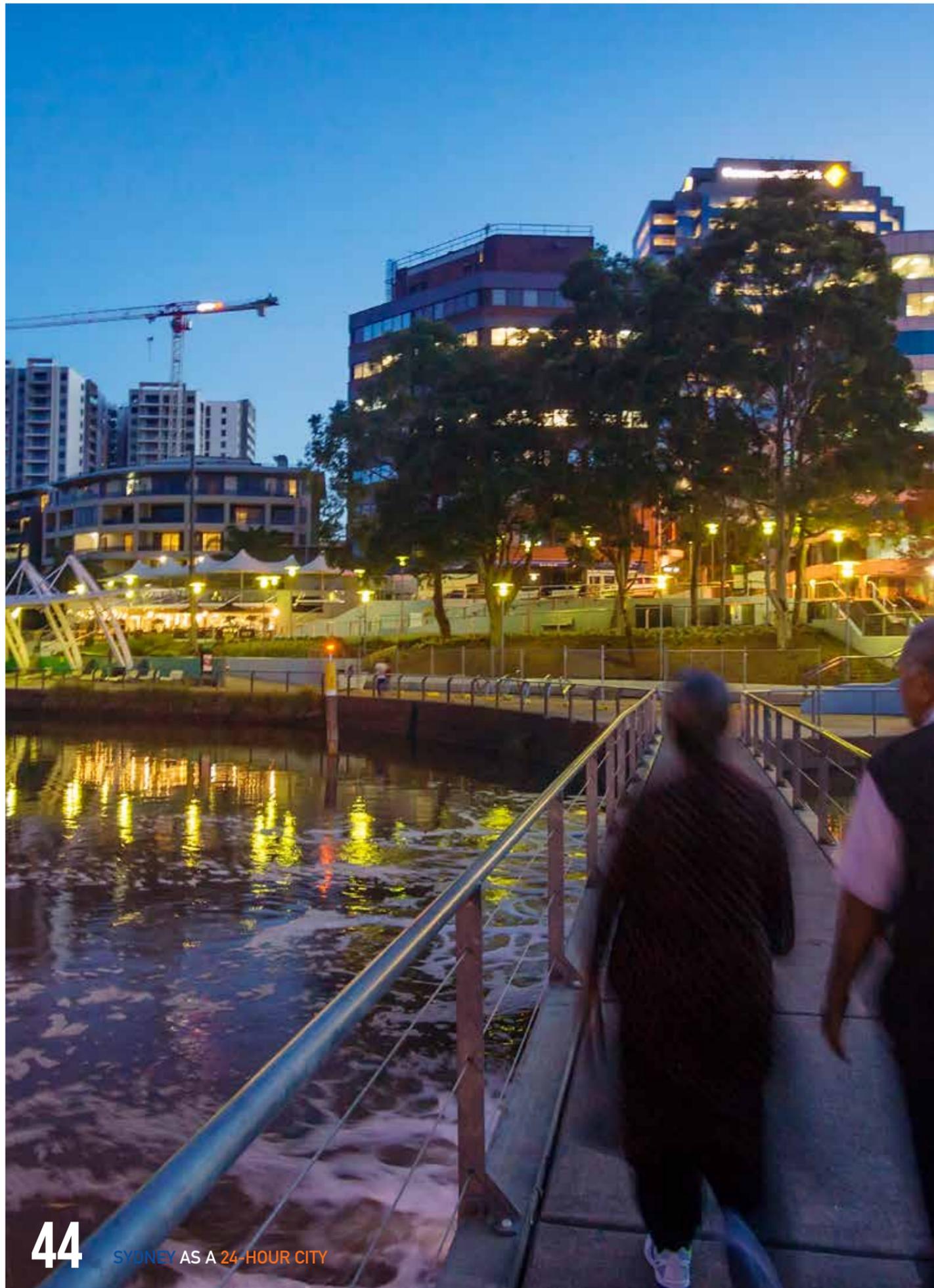
In some cities, late night transport improvements such as bus services have been funded by nightclub owners (such as in the Netherlands) or via partnerships between councils, police, transport providers and venue operators.

Places with integrated approaches to city and precinct dispersal at night are more likely to be effective. For example, Glasgow's "Night Zone – Safer Transport Initiative" integrated increased taxi rank capacity, dedicated night bus stops, a linked radio network between venues, changed traffic sequences to manage pedestrian congestion, bus and taxi marshals, public help points, signs to public transport and more public transport information. We suggest that a similar pilot scheme could be undertaken in parts of Greater Sydney.

RECOMMENDATIONS

RECOMMENDATIONS FOR AN INTEGRATED APPROACH TO PLANNING AND TRANSPORT

- Local Councils responsible for major night-time precincts should pilot 'Night-time Business Improvement Districts' as a genuine partnership between councils and local businesses involved in the 24-hour economy.
- Options for funding raised through Business Improvement Districts might include upgrading of CCTV networks where relevant, better lighting and streetscape upgrades.
- A Night Zone – Safer Transport Initiative should be piloted, potentially in Business Improvement Districts.
- Transport for NSW should work with councils to develop an integrated transport strategy for major night-time employment and entertainment precincts.
- In conjunction with the development of this strategy, TfNSW should pilot extra public transport services for major night-time precincts.
- The Commission supports the establishment of a neon grid, a series of identified entertainment precincts across the city, connected by an efficient and accessible late-night transportation system.
- Planning controls should be amended so that any new development with a residential component within 100 metres of an entertainment venue will have to assess the noise from that venue and design and build to manage the noise.
- Amend the SEPP Exempt and Complying Codes 2008 to allow for small scale arts venues as a temporary use under all zonings except Residential.



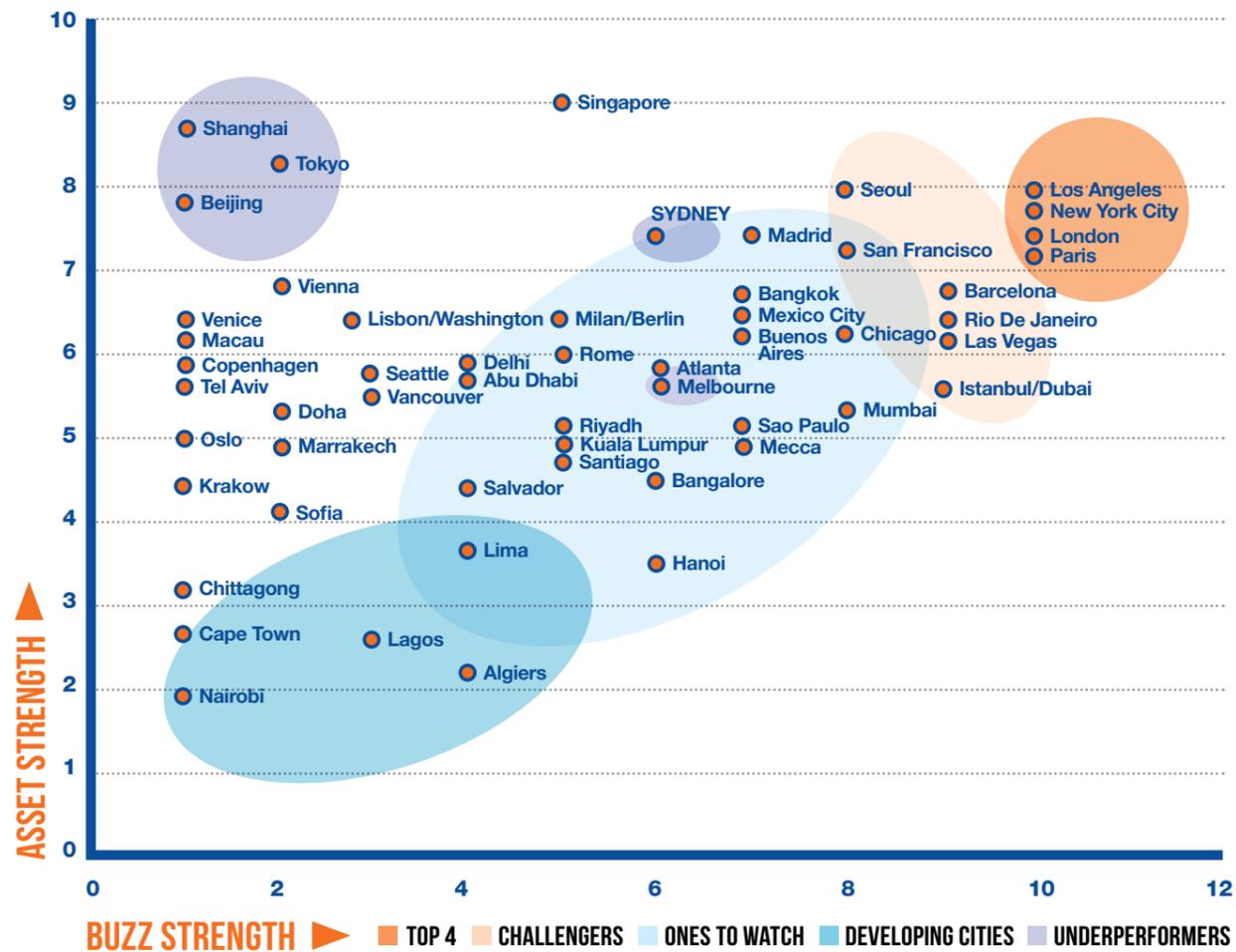
CHAPTER 5 PROMOTION & BRANDING OF GREATER SYDNEY AS A 24-HOUR DESTINATION

The night-time economy is an important factor in ensuring that Sydney attracts and retains a highly-skilled and talented workforce; continues to attract a high number of international students and maintains its position as an outstanding tourist destination. The effective promotion, branding and marketing of Sydney as a 24-hour city is integral to this.

The Guardian Cities Global Brand Survey measures two aspects of a city's brand: its "assets" — attractions, climate, infrastructure (particularly transport), safety and economic prosperity — and its "buzz", a combination of social media (Facebook likes

and Twitter sentiment analysis) and media mentions. Sydney is ranked as having the 16th strongest brand of any major city in the world, ahead of Melbourne but behind the top 5 of Los Angeles, New York City, London, Paris and Seoul.

Guardian Cities Global City Brand Barometer



Source: Saffron Brand Consultants

The survey has an element of subjectivity and is open to challenge, but The Guardian poses a neat question for the city: "Amazing transport, shopping, economic opportunity and climate. So why aren't more people talking about Sydney?"²⁰

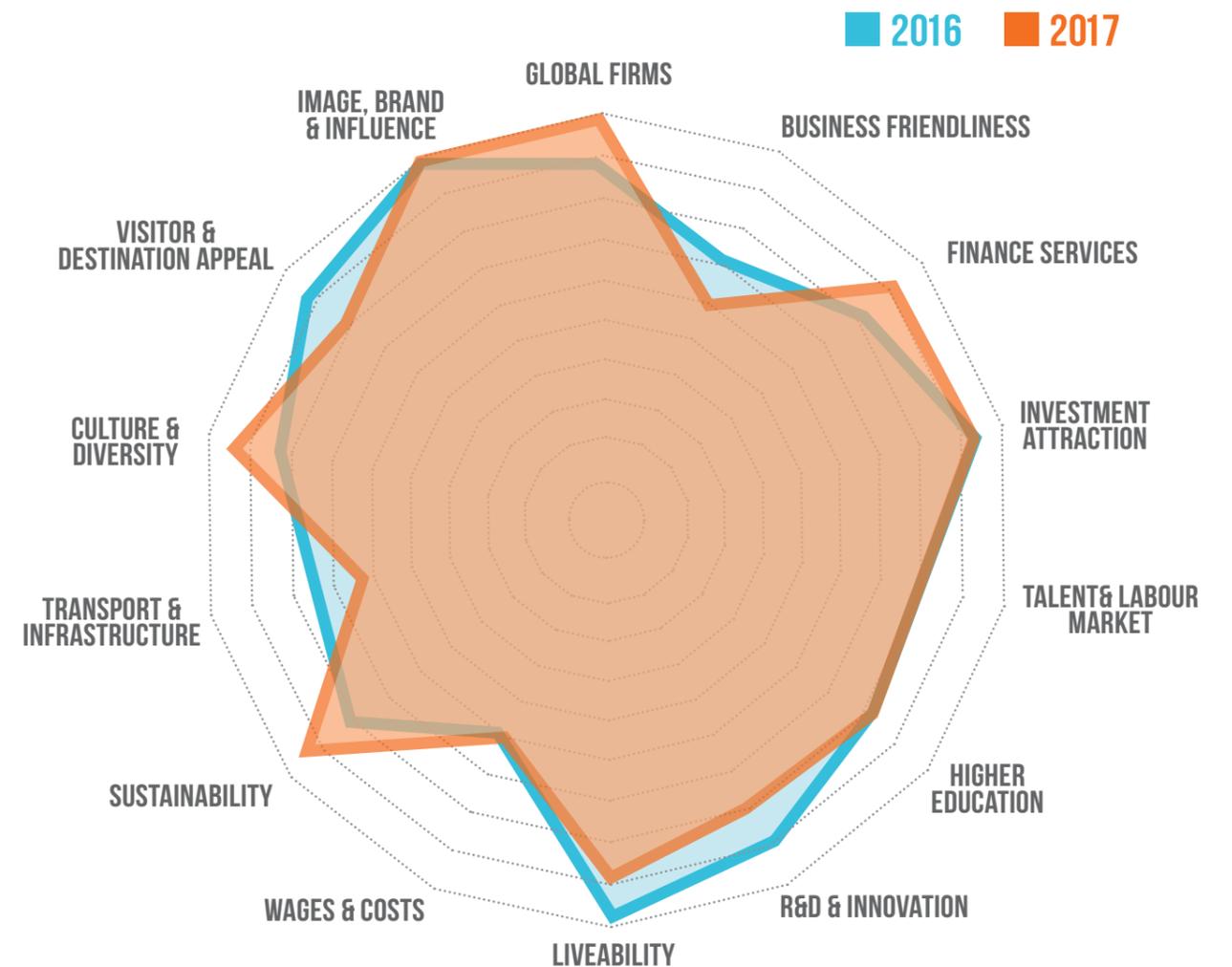
The strength of Sydney's brand has also been noted in the Committee for Sydney study,²¹ *Joining the Top Table*, which ranked Sydney's brand appeal as among top two of the 'contender' world cities (other contender cities being Amsterdam, Beijing, Chicago, Los Angeles, Madrid, San Francisco, Shanghai, Sydney, Toronto and Washington DC).

The analysis found that that "Sydney remains the most highly regarded and admired city in the world,

scoring highly for aesthetic appeal, quality of place, safety and lifestyle...Sydney is one of the most written about and pictured on social media platforms, and right at the top of travel wish lists for all kinds of visitors". However, it also argues that "Sydney does not communicate its industry strengths sufficiently, despite its core appeal to businesses because of its quality of life and business environment. In terms of business brand Sydney only ranks 29th of 67 cities, behind other cities that are also sometimes associated with lifestyle and tourism".

Here lies the crux of the issue: Sydney has an outstanding global brand, but more could be done to maximise its potential.

Sydney's international performance and perception spidergram, June 2017



To achieve this, public and private sectors in Sydney must work together to establish a successful night-time economy. This includes local authorities, land-owners, investors and operators acting through partnerships and promotion. Where large demographic groups tend to avoid the city at night, as in Sydney, it's critical that all parties work to change the perception of city centres to build diversity of night-time users.

Where the public sector already promotes tourism and packaging, such as activities from City of Sydney, Destination NSW and Tourism Australia, the private sector plays an important role at a local level with domestic visitors, as well as providing key information and marketing resources to the public sector.

Currently, there is no specific website or app where business, visitors or residents can access information about activities in Sydney after 6pm. Visitor information services have typically closed at 5pm with some extended hours over summer, but international visitors and students need better connectivity to city life. Sydney is only just beginning to connect businesses to events but has previously seen great success with more than 170 shops trading late in the city during the Vivid festival. The Commission recommends establishing a dedicated digital resource and/or Guide to Night-time Sydney developed by a partnership of public and private interests.

PARIS OFFERS A WEB PORTAL AND HARD COPY MAP AT WWW.PARISNIGHTLIFE.FR

which displays information about late night entertainment and transport. Visitors can search by activity category, geographic zone, venue or date, or browse the most popular night-time activities.



Wayfinding //

Being able to navigate night-time districts is important for safety, managing the movement of people and attractiveness of an area. Wayfinding is an important consideration in the planning and design of public areas during both the day and night-time. Members of the Commission raised concerns that Greater Sydney lacks an integrated and uniform approach to night-time signage and wayfinding, both in the physical and digital form. The temporary wayfinding established in the CBD during Vivid was highlighted as a useful template for night-time activities, as the signage gave clear information not just about the festival itself but other amenities nearby. The Commission believes that this template could be used all year round for night-time wayfinding.



It was also suggested that Sydney replicates a similar scheme to the pedestrian wayfinding program, Walk!Philadelphia, which divided the city centre into five districts, each with its own color-coded branding. The neighbourhoods were then knitted together by an extensive system of signs and street maps.

In addition, as Sydney embraces the potential for smart city technology, greater use of digital wayfinding at night should be explored. This could include the use of interactive kiosks and smart totems, providing real-time information, orientation maps and directional information. Kiosks and smart totems could include touch screen, maps, slogans and the opportunity to access the additional resources.

We therefore suggest that the NSW Government to work with councils and the Greater Sydney Commission, as well as relevant businesses and agencies, to develop an integrated wayfinding strategy, with a particular focus on night-time activities, for Greater Sydney.

Councils in Greater Sydney could also consider introducing a scheme similar to the 'Purple Flag' project in the UK, an accreditation process that allows members of the public to quickly identify town & city centres that offer an entertaining, diverse, safe and enjoyable night out.

POSITIVELY CLEVELAND 2013 IS A WAYFINDING MASTER PLAN FOR THE CITY OF CLEVELAND.

It is a large-scale study which proposes how the city can be joined together into a seamless system that supports visitors along their journey. This wayfinding master plan aims to improve the visitor experience in Cleveland and provide a better connection between the visitors and the elements of Cleveland's world-class destinations. Services available include a downloadable suite of maps available online on the Positively Cleveland's website; digital units (kiosks, screens or temporary signage) showing real time information on the street and satellite navigation/ GPS capabilities and downloadable applications for mobile devices such as smartphones.

The City of Sydney has developed a **PEDESTRIAN WAYFINDING STRATEGY AND DESIGN MANUAL** to provide a clear and coordinated framework. The strategy and manual aim to ensure signage is consistent to help people get to their desired destination.

The manufacture and installation of Pylons, Flag and Finger signage commenced in April 2016. To date wayfinding signage has been installed in the City Centre, Pyrmont, Redfern, Surry Hills, Kings Cross, Woolloomooloo and Darlinghurst and parts of Green Square. Signage along the new light rail corridor will also be installed in line with the light rail construction completion.



Tourism //

Night-time activities are also a critical part of the tourism sector. A vibrant and diverse 24-hour offering can attract domestic and international tourism, as well as providing opportunities for economic growth.

Sydney needs a viable night-time economy if it is to remain a global city and Australia's leading visitor destination. The visitor economy is one of Sydney's largest export industries and is heavily reliant on a vibrant and accessible night-time economy.²²

More than half of all international visitors and two-thirds of all business visitors to Australia visit Sydney, and visitation is expected to continue growing.²³ There'll likely be a significant increase in international tourists; where major cities are known for their street life and food cultures, expectations for Sydney's offer will be high.

Domestic visitors seek similar experiences. Research shows these visitors want to "eat out at restaurants" (63%), "visit friends and relatives" (50%), "shop for pleasure" (28%) and enjoy "general sightseeing" (24%).²⁴ Sydney would benefit from enhancing the night-time dining experience for these visitors to include shopping or cultural activities.

The economic benefits of packaging experiences and 'cultural tourism' are widespread. Every visit to the theatre or other cultural venue creates a 'multiplier effect' where the audience also visits nearby bars, cafés and restaurants.²⁵ Figures from Business Events Sydney have found that international visitors attending events in New South Wales spend \$974 per delegate, per day and that international business event delegates spend up to 4.6 times more than holiday visitors.



Branding Sydney to other international visitors //

Commission members were also concerned that Sydney currently does not do enough to brand its night-time offer to two key international markets: international business investment and international students. Sydney competes with other global cities for private investments, business conferences, world sports events, talents in research and science, film productions, political summits, cruise ships, international headquarters and new airline connections. Business Events Sydney and other agencies perform a key role in attracting international investment into Sydney and we feel that their work could be enhanced by a better night-time offer in Sydney.

International education has surged ahead of tourism to become NSW's highest service export industry by nearly \$2 billion, and the number of overseas students at the state's universities has grown by more than 30,000 over two years. However, research from the City of Sydney and UTS²⁶ demonstrates concern from international students at the lack of available night-time transport and walking through urban areas at night. As part of the Commission's call for greater diversity of activities at night, we urge a Greater Sydney night-time economy strategy to make provision for longer-stay international visitors and in particular to focus on attractions other than alcohol.

RECOMMENDATIONS

RECOMMENDATIONS FOR PROMOTING SYDNEY AS A GLOBAL 24HOUR CITY

- NSW Government, in partnership with other agencies, should extend existing promotional guides to produce a guide to night-time activities, including a digital version, to market and promote Sydney to regional and international visitors.
- Councils across Greater Sydney could consider introducing a scheme similar to the 'Purple Flag' project in the UK, an accreditation process that allows members of the public to quickly identify town and city centres that offer an entertaining, diverse, safe and enjoyable night out. Councils should also work on cross-boundary night-time economy strategies.
- NSW Government should work with councils and the Greater Sydney Commission, as well as relevant agencies, to develop an integrated wayfinding standard for Greater Sydney, with an appropriate focus on night-time activities.

CONCLUSION

This report has brought together the expertise of over 50 organisations across Greater Sydney. This cross-sector, collaborative approach has, we believe, unlocked ideas to move the debate on the night-time economy forward in Greater Sydney. As with any collaborative exercise, there has not always been universal agreement on the recommendations outlined in the report, but fresh thinking has been achieved through the detailed analysis and input of Commission members.

WE BELIEVE THAT THE COMMISSION HAS ESTABLISHED SOME IMPORTANT PRINCIPLES:

- o A strategy for the night-time economy requires a whole-of-government approach.
- o State government has a key role in coordinating a diversity of public, private and civic organisations involved in the night-time economy.
- o The focus must also be on Greater Sydney as a whole, not just the harbourside CBD.
- o However, there is no 'one-size-fits-all' solution to precincts in Greater Sydney. Different areas will have different solutions and a different emphasis on activities. Councils have a central role in defining this approach.
- o A well-performing night-time economy relies on integrated planning and place-shaping.
- o A diversity of activities, particularly aimed at a wide demographic, is vital to creating a vibrant night-time offer.
- o The night-time economy is as much about the twilight hours of 6-9pm as what happens late at night.
- o Sydney could do more to accentuate its inherent advantages such as beautiful environment, warm climate and outstanding global brand to make the city one of the world's greatest night-time destinations.
- o Better use of technology, coordination and city planning can create environments that are both safe and enjoyable.
- o No one city can claim to have a perfectly functioning night-time economy, however learning from international examples is likely to inform a better approach in Greater Sydney.

The Committee for Sydney intends to use this report to actively take forward its recommendations and to work with our members to practically deliver as many as possible. As a 'do tank' as well as a 'think tank', we will be at the forefront of implementing new ideas, approaches and practices to support and expand the night-time economy across Greater Sydney.



THE COMMITTEE FOR SYDNEY WOULD LIKE TO THANK THE FOLLOWING ORGANISATIONS FOR THEIR INPUT INTO THE COMMISSION ON THE NIGHT-TIME ECONOMY IN GREATER SYDNEY:

- Accor
- Airbnb
- Art Gallery of NSW
- Arup
- Australia-Israel Chamber of Commerce
- Australian Hotels Association NSW
- Australian Turf Club
- Business Events Sydney
- City of Canterbury Bankstown Council
- City of Parramatta
- City of Sydney
- Create NSW
- Destination NSW
- Ethos Urban
- Financial Services Council
- Grimshaw Architects
- Haymarket Chamber of Commerce
- International Convention Centre Sydney
- Ipsos
- Lendlease
- Liquor & Gaming NSW
- Live Music Office
- Liverpool City Council
- Luna Park Sydney
- Mastercard
- McKinsey & Company
- News Corp Australia
- NSW Department for Planning & Environment
- NSW Police Force
- Outdoor Media Association
- PwC
- Scentre Group
- Sydney Festival
- Sydney Fringe
- Sydney Living Museums
- Sydney Opera House
- Sydney Symphony Orchestra
- The Hornery Institute
- The Star Entertainment Group
- Transport for NSW
- Uber Australia Pty Ltd (Sydney)
- UNSW
- UTS
- Western Sydney Business Chamber
- Western Sydney University

FOOTNOTES

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The Committee for
Sydney



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