City of Sydney

Visitor profile and experience survey

REPORT

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Client contact: Kylie Wiik

Project no. 26741/28144

Date: December 2017

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21st December 2017

City of Sydney
Attention: Kylie Wiik
Town Hall House
456 Kent Street
Sydney NSW 2000

VISITOR PROFILE AND EXPERIENCE SURVEY

Dear Kylie

Enclosed is the visitor profile and experience report for the intercept surveys research conducted in key areas across the City of Sydney (including the Northern CBD, Central CBD, Southern CBD, Potts Point, Oxford St, Newtown, Pyrmont, Glebe, Redfern, Surry Hills, and Green Square).

This report has been prepared in accordance with the terms and conditions of the proposal accepted on/or dated on the 6th October 2017. We acknowledge and appreciate the assistance provided by the Council of the City of Sydney in the performance of our work with regards to this project.

Please contact Stuart Attwood on 02 9248 5060 if you have any questions regarding this report.

Yours sincerely,

Erik Heller
Partner
EY Sweeney

Stuart Attwood
Head of Quantitative Research
EY Sweeney

EY Sweeney (a trading name of Ernst & Young) ("Consultant") was engaged on the instructions of the Council of the City of Sydney ("Client") to undertake visitor intercept surveys research across key areas across the City of Sydney ("Project"), in accordance with the engagement agreement dated 6th October 2017 including the General Terms and Conditions.

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Contents

EY Sweeney is accredited under the International Standard, ISO 20252.

All aspects of this study will be completed in accordance with the requirements of that scheme.

Also please note that EY Sweeney's liability is limited by a scheme approved under professional standards legislation. A copy of the scheme can be obtained from us upon request.

Introduction

The City of Sydney local government area (LGA) covers a range of active commercial daytime and night time economies, including a variety of iconic inner city precincts and suburbs. The diverse nature of these precincts means a number of unique considerations and opportunities must be understood when developing business and community engagement strategies.

To better understand these considerations and opportunities, the City has routinely undertaken daytime community research in a number of the city's precincts since 2010, as well as completing Late Night Management Areas Research in 2010, 2012 and 2015.

These research programs have identified a series of key insights for the City, including the types of people who are active in commercial areas across the city at various times and different locations. The research has also identified how people travel to and from different locations in the city and their main reasons for visiting various locations.

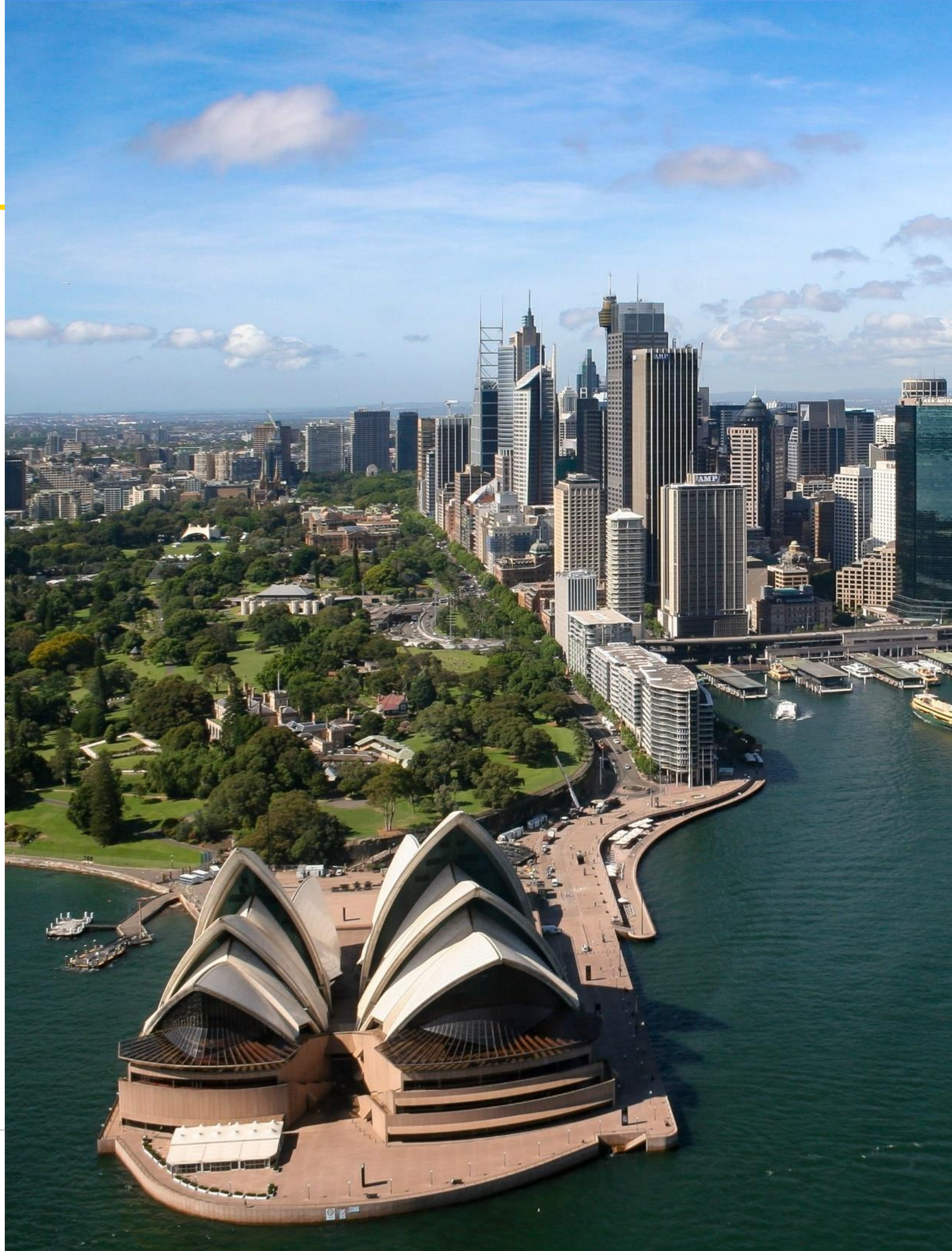
To continue building on the positive outcomes of these community research pieces, the Council of the City of Sydney commissioned EY Sweeney in 2017 to undertake an holistic precinct and community engagement piece, covering visitor experiences across both day and night time settings.

The research involved the completion of quantitative surveys with international guests, domestic visitors as well as Sydney residents in seven key locations across the city. The survey aimed to identify comprehensive daytime and night time visitor profiles in each location, the main reasons for visiting, behaviours whilst in the area, visitor experience outcomes and indicative spend levels while in the area.

This document outlines the key findings of the survey. Section 1 briefly outlines overarching findings across an initial seven locations surveyed in April to June 2017, including: the Northern CBD, Central CBD, Southern CBD, Potts Point, Oxford St, Newtown, and Pyrmont. Section 2 provides detailed findings for each of the precincts. In section 3, detailed findings are included for an additional four locations, surveyed in October 2017, including: Glebe, Redfern, Surry Hills, and Green Square. In the final section, a series of strategic thought-starters are presented for consideration by the City of Sydney and businesses moving forward.

For any questions or queries about this research or findings, please email:

Kylie Wiik
KWiik@cityofsydney.nsw.gov.au



Methodological overview

A total of 11 precincts were included in the research (see table opposite), with seven initial precincts surveyed in June 2017, and a further four precincts surveyed in October 2017. Due to the differences in fieldwork timings, no comparisons have been made between precincts surveyed in different waves. All due care has been made to maintain a consistent research methodology and survey approach across both waves of the research.

For the first wave of surveying, interviewing occurred between 26th of April and the 24th of June 2017. The fieldwork schedule was designed to ensure a spread of experiences were captured at various times of the day across each of the precincts. To avoid potential sampling bias, no surveying was undertaken during the Vivid festival (26th May to 17th Jun), as this period significantly impacts on footfall and visitor composition in the inner city area. In the second wave of surveying interviews were conducted between the 11th and 28th of October 2017.

Across each precinct, surveys were undertaken on Wednesdays and Saturdays. This approach allowed the survey to gauge behavioural and experiential differences between the working week and the weekend in each location. Interviewing took place from 9am until 12am. Throughout this document, references to “daytime” refer to the period of 9am to 6pm, while “night time” refers to the period of 6pm to 12am.

Questionnaire

A copy of the questionnaire used in the research has been included in the appendix. Please note, figures in this document are subject to rounding and, as such, figures may not always sum to 100%.

Analysis of data

Data has been analysed using Statistical Package for the Social Sciences (SPSS) and Q statistical software.

All results are subject to a margin of error. The total sample of n=3,741 for the first wave has a margin of error is ±1.6%. That is, we can be 95% confident the survey estimates are reflective of all visitors to within ±1.6%. For the second wave of n=2,119, the margin of error is ±2.1. Where individual precincts or demographic subgroups are analysed, the margin of error increases. The table below provides some indication of how the margin of error adjusts for different subgroups

Sample size	Margin of error
n=500	±4.4%
n=250	±6.2%
n=100	±9.8%
n=50	±13.9%

Indexing

The results of the precinct deep dives have been compared to an index. This index refers to the average score across all precincts (calculated separately for the first seven precincts and additional four precincts). Please note, this score is intended to provide context only and should not necessarily be treated as a reflection of the performance of the precinct on any given measure.

PRECINCTS							
n	9am to 3pm	3pm to 6pm	6pm to 9pm	9pm to 12am	Wed-nesday	Satur-day	TOTAL
Seven precincts (April to June 2017)							
TOTAL	923	973	958	887	1915	1826	**3741**
Northern CBD	132	145	134	127	279	259	**538**
Central CBD	122	134	136	127	259	260	**519**
Southern CBD	134	152	140	124	281	269	**550**
Potts Point	127	136	151	125	281	258	**539**
Oxford St	132	129	136	132	273	256	**529**
Newtown	143	138	128	124	265	268	**533**
Pyrmont	133	139	133	128	277	256	**533**
Four precincts (October 2017)							
TOTAL	544	526	529	520	1075	1044	**2119**
Glebe	129	139	134	126	269	259	**528**
Redfern	154	126	128	128	281	255	**536**
Surry Hills	132	131	133	137	263	270	**533**
Green Square	129	130	134	129	262	260	**522**

Executive summary

Executive summary

1

COS caters to a diverse range of audiences and behavioural profiles

The City of Sydney attracts a wide range of visitors from different locations, ages and social backgrounds. These diverse profiles mean that businesses across the city must cater for a variety of activities and behaviours. With that in mind, when asked what could improve their experiences, most visitors highlighted similar opportunities, including: shopping, F&B and entertainment offerings. Going forward, it may be beneficial for local businesses to receive insights from the COS on how these offerings could be optimised in each precinct, to continue encouraging positive customer experiences in the precincts.

Consider reviewing the shopping and F&B options in each area and highlight potential "gaps" in the local economy. Potentially also consider identifying and communicating opportunities for local businesses to diversify, or better communicate their offerings

2

Behaviours differ in the evening, but potential exists to build traditional daytime offerings

The behavioural profile of each precinct varies significantly between daytime (9am to 6pm) and night time (6pm to 12am) contexts. For example, in wave 1 daytime visitors are significantly more likely to buy coffee (52% compared to 32%) or go shopping (27% compared to 15%). In contrast, after 6pm people are significantly more likely to visit a bar or pub (43% compared to 23%). Despite these differences, when night time visitors were asked what would improve their visit to the city, more than 1 in 5 said they would like to see more shops open. These behaviours were also consistent across wave 2 of the research findings.

Consider undertaking pilots in key areas of the city to better understand if extended trading hours could have a positive net effect for businesses and visitors during evening hours. Consideration would also need to be given to potential impacts on daytime shopping

3

Online searches, websites and social media are critical tools for engaging with consumers

Overall, 3 in 4 visitors said they use online channels to find out about things to do in Sydney (e.g. websites, social media, online searches) in wave 1 of the research. Comparatively, only around half of visitors rely on word-of-mouth (the most commonly used traditional channel). This result highlights a critical need for businesses across the city to develop and maintain a vibrant online presence, with more than half of Sydney residents using social media, while 2 in 5 international visitors use search engines and 3 in 10 use travel websites (significantly higher than other visitor types). Similar trends were also seen in wave 2.

Consider offering tips to local businesses to help them improve their online and social media presence/behaviours – also determine whether COS can further promote precincts and activities to raise awareness and influence footfall

Overarching findings

This section includes overarching findings from the seven initial precincts surveyed in June 2017, findings for the additional four precincts surveyed in October 2017 can be found later in this document.

Social and leisure activities as well as business purposes were the main reasons for the majority of people visiting the inner city area

Overall findings

Social and leisure activities were the most common reasons for visits amongst visitors… across the inner city, socialising and leisure activities were the main reasons domestic and international visitors went to any particular area (sightseeing was also notably higher amongst both groups in each location surveyed). While social and leisure activities were also common amongst Sydney residents (i.e. inner city and greater Sydney residents), they were significantly more likely to have other reasons for visiting any particular area. For example, inner city residents were more likely to be passing through on their way to other locations or doing shopping, while residents from the greater Sydney area were more likely to be visiting areas for business reasons

Time of day a key factor… time of day also impacted on people's reasons for visiting areas across the city. For example, international visitors were significantly less likely to go sightseeing in the evening (34% compared to 53% during the day). Alternatively, social and leisure activities were more prevalent amongst Sydney residents at night, with 49% of inner city residents and 59% of residents from the greater Sydney area visiting an the inner city area after 6pm for this reason (compared to 31% during the day)

Weekdays focus on business while the weekend is more social… Sydney residents and domestic visitors were significantly more likely to visit an inner city area for business purposes during the week. In contrast, each of these groups were significantly more likely to visit the inner city on the weekend for social/leisure reasons or to go shopping

Gender and age also key differentiators… with men significantly more likely to report visiting an area for business reasons than women (22% compared to 16%), while women were more likely to indicate they visited an area for social/leisure purposes (47% compared to 42%) or for shopping (12% compared to 8%). Age was also a factor, with those aged 30-49, more likely to visit an area for business (24% compared to 17% across other age groups) while those aged 50+ were more likely to be sightseeing (14% compared to 9% across other age groups) and shopping (13% compared to 9% across other age groups). Note, there may be some interrelation between these demographic groups, with the average age of female respondents marginally younger than their male counterparts (31.9 years compared to 34.1 years). However, this effect would only be marginal

Reasons for being in an inner city area (%)

		Inner city residents	Greater Sydney residents	Domestic visitors	International visitors
Here for social or leisure purposes	44	40	45	55	49
Here for business purposes	20	16	27	22	10
Just passing through	15	19	12	7	13
Just doing some sightseeing	10	5	6	22	44
Here doing shopping	9	11	7	6	13
Here to catch public transport	8	9	9	3	5
Here for an appointment	3	3	3	2	0
Other	13	17	10	8	4
Don't know/prefer not to say	1	1	1	0	0

Base: All respondents, n=3,741; Inner city, n=1,795; Greater Sydney residents, n=1,360; Domestic visitors, n=289; International visitors, n=297
Q1

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Buying food and drinking coffee were the most common activities undertaken whilst in Sydney's precincts, however, behaviours vary across visitor groups and by time-of-day

Overall findings

Activities undertaken whilst in the Sydney area (%)

Activity	Total	Inner city residents	Greater Sydney residents	Domestic visitors	International visitors
Bought food from a restaurant or café in the area	53	51	53	67	59
Bought/drunk coffee or tea	42	41	42	46	44
Visited a bar or pub	33	31	33	42	39
Browsed or bought from shops	21	21	18	28	27
Showed friends or relatives around the area	12	14	11	15	9
Attendeded an event, business meeting or conference	12	11	14	16	7
Viewed/listened to cultural attractions in the area	11	10	9	17	23
Stayed overnight in the precinct	9	7	3	27	29
None of these	14	15	14	7	11

Base: All respondents, n=3,741; Inner city, n=1,795; Greater Sydney residents, n=1,360; Domestic visitors, n=289; International visitors, n=297
Q3

Shopping and coffee more common in the daytime… across all consumer groups, shopping/browsing and drinking coffee were more common during the day. For example, more than a quarter of inner city residents browsed or bought from a shop during the day, while only 15% did so after 6pm. This broadly aligned with the main reasons for visiting – with fewer people going to any location to shop in the evening. This may however, be a function of what shops are open at this time of day. Going forward, it may be useful to undertake further research to understand if extending trading hours of shops and cafes in inner city areas could be an incentive for more visitors to engage in these activities after 6pm

International visitors less likely to visit cultural attractions at night… international visitors were significantly less likely to attend cultural attractions in the evening (16% compared to 30% during the day). Again, this may be a function of availability at this time of day. There may be some benefit in investigating potential avenues to increase engagement with cultural attractions after 6pm, with other non-permanent cultural attractions (e.g. VIVID) effectively achieving this type of behaviour change in the past

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social media, word of mouth and Google searches were the most common methods to discover things to do whilst in the inner city

Overall findings

Main methods used to find out about things to do in Sydney (%)

	Overall	Inner city residents	Greater Sydney residents	Domestic visitors	International visitors
Social media	49	52	53	34	32
Recommendations from friends/family/colleagues	49	49	49	42	48
Search engines (e.g. Google)	33	32	33	36	40
Other websites	13	14	12	13	12
Event websites (e.g. whatsonsydney, etc.)	10	11	11	8	6
Travel websites (e.g. trip advisor)	10	9	7	9	30
Newspapers	9	10	9	6	4
City of Sydney website	8	9	8	6	8
TV programmes	5	6	6	4	3
Tourist flyers	4	4	2	4	12
Radio	3	4	4	1	2
Membership emails (e.g. Opera House)	3	4	3	2	0
Other	3	4	3	4	3
None of these / Don't know	4	4	4	7	4

Base: All respondents, n=3,741; Inner city, n=1,795; Greater Sydney residents, n=1,360; Domestic visitors, n=289; International visitors, n=297
D1

Having an online presence is critical for businesses in these precincts, with

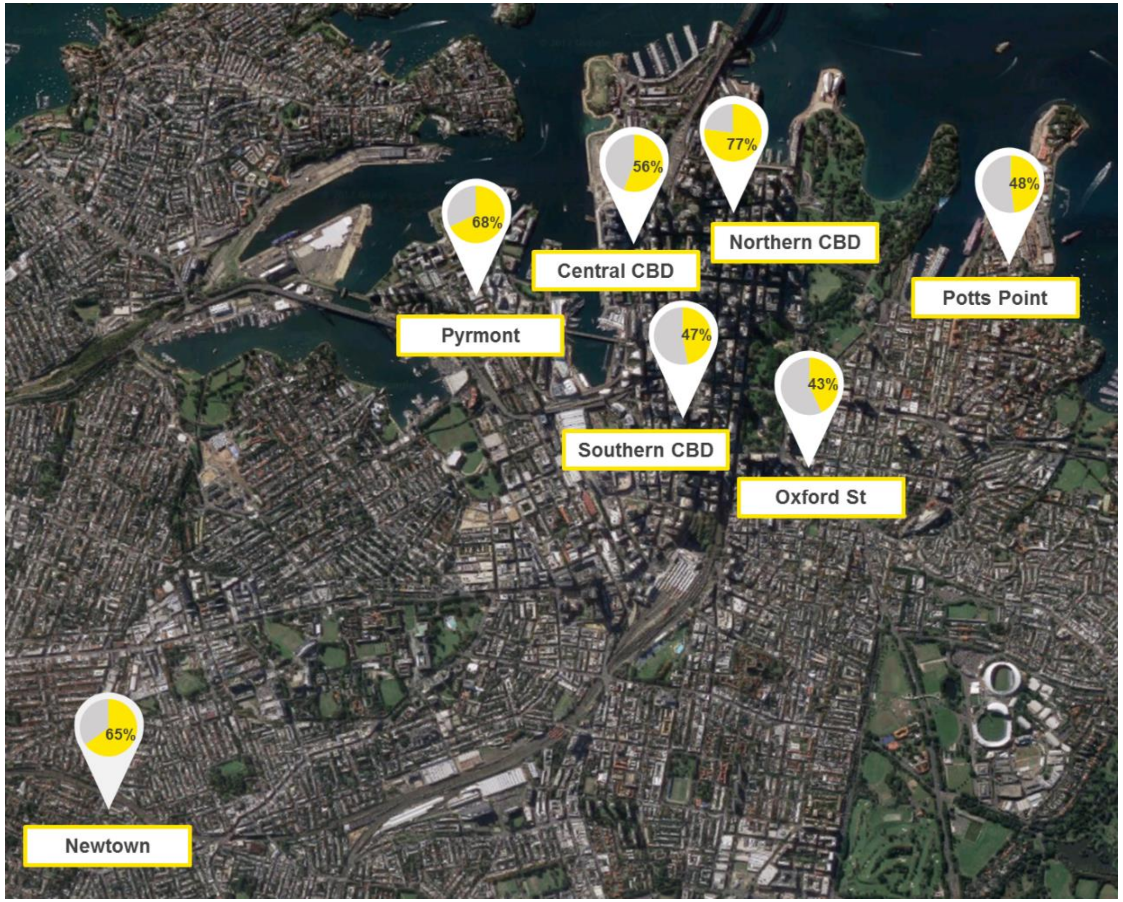
3 in 4

visitors using social media, search engines or websites to find out about things to do in Sydney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Positive satisfaction ratings across the city, were most often driven by strong F&B offerings and an inviting/safe atmosphere

Overall visitor satisfaction by precinct - 8-10/10 (%)



Factors associated with satisfaction across Sydney (r*)

	Overall	Inner city residents	Greater Sydney residents	Domestic visitors	International visitors
The range of dining and food options	**42**	41	42	45	34
The area is inviting and safe	**40**	41	37	38	50
Culture and entertainment in the area	**34**	34	36	30	26
The variety of shops	**31**	32	31	22	38
Ability to find your way around	**28**	29	31	36	19

Base: All respondents, n=3,741; CBD north, n=538; CBD centre, n=519; CBD South, n=550; Potts Point, n=539; Oxford St; n=529; Newtown, n=533; Pyrmont, n=533
Q11, Q12

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Wayfinding is an important factor to the visitor experience, but opportunity to optimise the city's shopping and entertainment offerings is crucial

Positive levels of satisfaction seen across the city… satisfaction levels were generally positive across the city, with at least 2 in 5 people indicating they were completely satisfied with their experience in each area – an overall average of 58%. Association analysis suggests the range of dining and food options in each area, as well as being inviting and safe were key factors driving these positive results

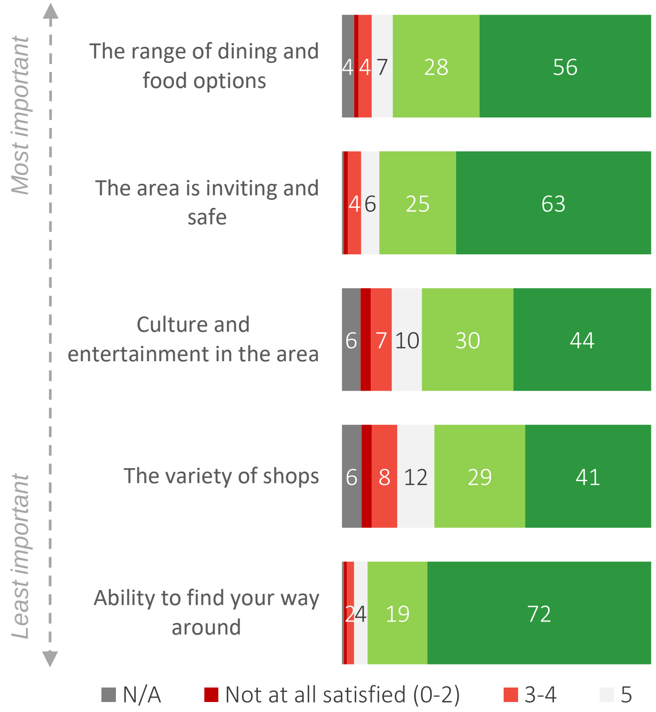
Opportunity to build on several areas… while satisfaction results were generally positive across the inner city, there may be some opportunity to build on the entertainment offerings in various precincts as well as focussing on the variety of shops, with less than half saying they were completely satisfied with these aspects across the all of the precincts. Note, these results were less prominent in the Newtown area, which is seen by many to have well developed cultural, entertainment and shopping offerings

International visitors feel safe, but slightly more-so during the day… overall, international visitors are highly satisfied with the safe and inviting nature of Sydney, notably outperforming other visitor groups on this measure. This result softened marginally in the evening, but was still higher than other groups. Interestingly, overall satisfaction amongst this group was substantially lower on the weekend (66% compared to 74% during the weekday)

Gender influenced satisfaction outcomes… with overall satisfaction significantly higher amongst women (60% compared to 56% of men). Satisfaction outcomes varied however, with males significantly more likely to feel areas were inviting and safe (65% compared to 60%), while women were significantly more likely than men to be satisfied with food and dining (58% compared to 54%) and the variety of shops (43% compared to 39%)

Age also a key factor… with people under the age of 30 more likely to be satisfied with cultural and entertainment offerings (47% compared to 42% across other age groups) and the variety of shops (44% compared to 37% across other age groups). In contrast, those aged 50+ were more satisfied with wayfinding (78% compared to 71% across other age groups)

Satisfaction with key drivers across the city (%)



% Completely satisfied (8-10 out of 10)

	Inner city residents	Greater Sydney residents	Domestic visitors	Interna-tional visitors
The range of dining and food options	57	54	55	55
The area is inviting and safe	61	63	64	74
Culture and entertainment in the area	43	45	44	48
The variety of shops	41	39	44	42
Ability to find your way around	77	69	60	67

Base: All respondents, n=3,741; Inner city, n=1,795; Greater Sydney residents, n=1,360; Domestic visitors, n=289; International visitors, n=297
Q12

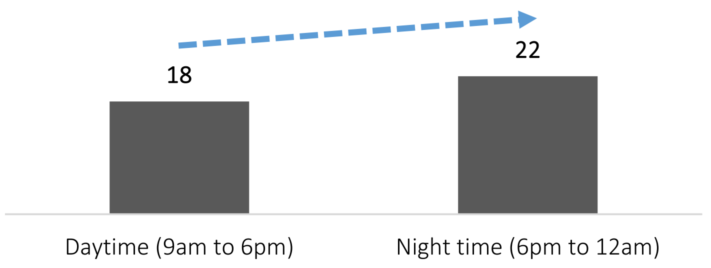
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Improving entertainment and cultural offerings, ensuring diverse shopping and F&B options are also identified as key opportunities amongst residents and visitors

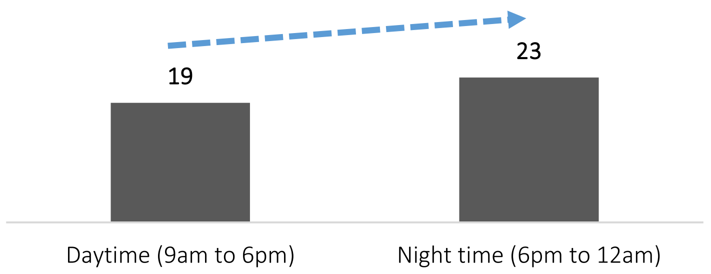
Top 5 Things that would make visits more enjoyable (%)

	Overall	Inner city residents	Greater Sydney residents	Domestic visitors	International visitors
Improved entertainment or cultural offerings	21	23	19	15	17
More shops open	20	23	18	12	21
More food options in the area	20	22	19	15	15
Wider range of shops	19	22	19	9	15
Better value for money (make things cheaper)	17	17	17	16	18

Would like to see more shops open (%)



Would like to see more entertainment or cultural offerings open (%)



Entertainment and culture seen to be an opportunity… when asked to identify things that would have made their visit more enjoyable, culture and entertainment was consistently identified across most precincts, and particularly amongst Sydney residents. Interestingly, this figure increased marginally in the evening for most groups

Ensuring a range of different shops are open is also important… 3 in 10 respondents indicated they would like to see more shops open and/or a wider range of shops operating. As with entertainment and cultural opportunities, the proportion who wanted to see more shops open increased marginally in the evening. The proportion who felt areas required a wider range of shops also increased indicatively throughout the week (22% compared to 17% on the weekend)

Base: All respondents, n=3,741; Inner city, n=1,795; Greater Sydney residents, n=1,360; Domestic visitors, n=289; International visitors, n=297
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Precinct deep dives

This section includes individual findings for the seven initial precincts surveyed in June 2017, findings for the additional four precincts surveyed in October 2017 can be found later in this document.

Scorecard: Precinct visitor profile





		Northern CBD	Central CBD	Southern CBD	Potts Point	Oxford Street	Newtown	Pyrmont
GENDER	Male	58	63	64	60	66	52	61
	Female	42	37	36	40	34	48	39
AGE	Under 30	48	52	65	45	53	60	48
	30-49	35	37	28	36	32	29	39
	50+	18	11	7	19	14	11	13
RESIDENTIAL LOCATION	Inner city	24	33	41	65	54	62	57
	Greater Sydney	44	52	43	22	32	29	33
	Domestic visitors	13	7	10	4	9	7	4
	International visitors	19	8	6	9	5	3	6
HOUSEHOLD INCOME	<$50K	34	30	47	36	43	44	25
	$50K to $100K	28	25	19	25	24	26	30
	$100K+	21	26	20	21	15	13	29
	Refused	17	19	14	18	18	16	16
	Work in the immediate area	30	45	39	29	31	23	45

Base: all respondents, n=3,741; respondents interviewed in the following areas - Northern CBD area, n=538; Central CBD area, n=519; Southern CBD area, n=550; Potts Point area, n=539; Oxford Street area, n=529; Newtown area, n=533; Pyrmont area, n=533
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

EY Sweeney

Scorecard: Precinct satisfaction ratings

	Index	Northern CBD	Central CBD	Southern CBD	Potts Point	Oxford Street	Newtown	Pyrmont
Overall satisfaction with visit (Proportion who rated their visit as 8-10 / 10)	58	77	56	47	48	43	65	68
The range of dining and food options	56	57	54	55	55	42	78	48
The area is inviting and safe	63	83	70	63	42	52	60	72
Culture and entertainment in the area	44	61	38	42	36	42	61	31
The variety of shops	41	39	45	58	30	33	56	23
Ability to find your way around	72	80	71	64	75	68	74	74
Activities in the precinct								
Food	53	57	59	57	53	42	59	45
Coffee/tea	42	43	51	45	43	36	39	38
Bar/pub	33	33	38	30	33	35	35	29
Shopping	21	18	21	27	21	15	26	17
Show friends/relatives around	12	15	14	9	10	10	16	12
Event, business meeting or conference	12	15	16	11	11	8	8	16
Cultural attractions	11	22	11	8	8	7	13	8
Overnight stay	9	13	8	7	12	5	7	8

Base: all respondents, n=3,741; respondents interviewed in the following areas - Northern CBD area, n=538; Central CBD area, n=519; Southern CBD area, n=550; Potts Point area, n=539; Oxford Street area, n=529; Newtown area, n=533; Pyrmont area, n=533
Q3, Q11, Q12

NORTHERN CBD

CENTRAL CBD

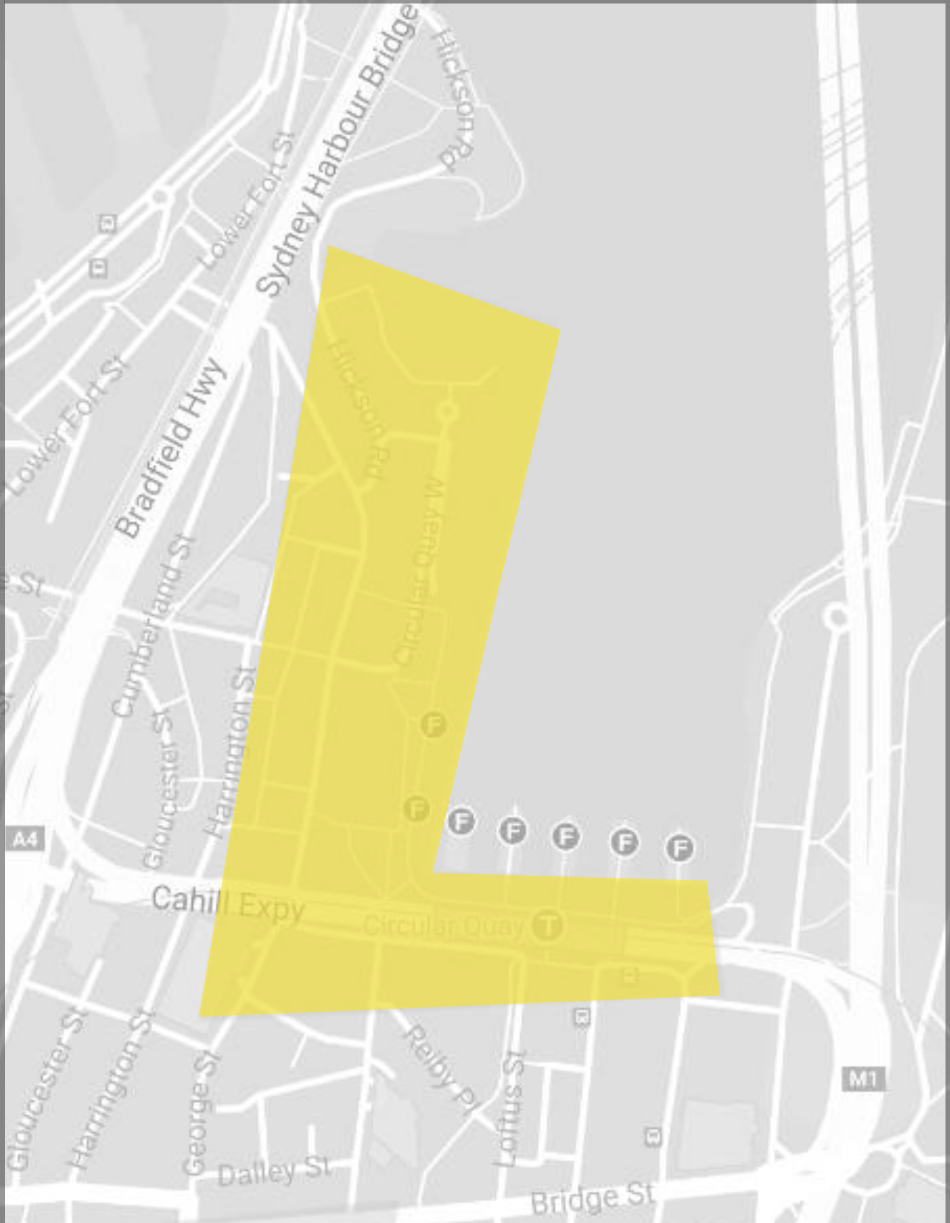
SOUTHERN CBD

POTTS POINT AREA

OXFORD STREET AND SURROUNDS

NEWTOWN AND SURROUNDS

PYRMONT AND SURROUNDS



CBD north area (including the area north of Hunter Street to Circular Quay through to The Rocks)

A variety of cultural attractions make the northern CBD highly attractive for domestic and interstate visitors

The northern CBD hosts an eclectic mix of people… overall, around 1 in 4 people in the precinct live in the inner city area, while just under half are from the greater Sydney region. The northern CBD also has the highest proportion of international (19%) and domestic visitors (13%) across any of the precincts surveyed. This composition changed marginally in the evenings, with the proportion of domestic visitors and international guests decreasing after 6pm. In contrast, the proportion of greater Sydney residents increased significantly from 39% during the day, to 50% after 6pm

Precinct skewed towards males… almost 3 in 5 visitors to the northern CBD were males, this skew was prevalent across both night and day, as well as weekdays and the weekend. The skew was similar to the index observed across all precincts and similar results have also been observed in other precinct research undertaken by City of Sydney in recent years. For example, City of Sydney's 2015 Kings Cross & Potts Point intercept study identified 3 in 5 visitors to the area were male

Visitor composition varied based on day of week… with inner city residents significantly more likely to be in the area on a weekday (28%) than compared to a weekend (20%). In contrast, visitors from other areas of NSW and interstate visitors were significantly more likely to be in the area on a weekend. Interestingly, 1 in 2 weekday visitors claimed to visit the area at least once a week, and 1 in 3 visitors actually worked in the area itself. On weekends there tended to be a greater proportion of domestic visitors with close to 1 in 5 visitors from greater NSW or other states in Australia

Older visitors less likely to be in the precinct at night… while around 1 in 5 people in the precinct during the day indicated they were aged 50+, this reduced to around 1 in 10 people after 6pm

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	58	-2	59	57	56	60
Female	42	+2	41	43	44	40
Under 30	48	-5	46	49	48	47
30-49	35	+1	31	38	33	36
50+	18	+4	22	13	18	17
Inner city	24	-24	24	24	28	20
Greater Sydney	44	+8	39	50	43	46
Domestic visitors	13	+5	16	11	8	19
International visitors	19	+11	22	15	21	16
<$50K	34	-4	35	33	33	35
$50K to $100K	28	+3	25	31	29	27
$100K+	21	+1	24	19	24	19
Refused	17	0	16	17	14	19
Work in the immediate area	30	-4	32	29	35	25

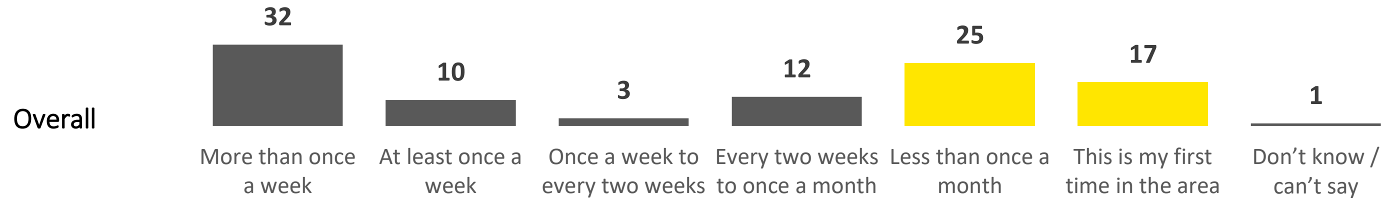
Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259). Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Majority of domestic visitors have been to the area before, whereas, for international visitors it's likely to be their first time

Northern CBD

Visitation frequency (%)



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	-20	-1	-2	+4	+11	+8	-1
Day time	37	9	4	9	25	16	1
Night time	27	11	2	15	25	19	1
Wednesday	43	8	2	10	18	18	1
Saturday	20	13	4	13	32	17	1
Inner city	49	15	5	12	11	8	2
Greater Sydney	41	13	3	17	22	4	0
Domestic visitors	4	4	3	4	68	15	1
International visitors	9	2	1	4	19	63	2

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, Greater Sydney=237, Domestic visitors=71, International visitors=100)
Q2

The northern CBD's proximity to iconic Sydney attractions and heritage sites, attracts a range of tourists with…

13%
Domestic

19%
International

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social/leisure and sightseeing were the main reasons for visiting the northern CBD

Northern CBD

Social and leisure activities is the overriding reason for visiting the area… more than half of visitors were in the northern CBD area for social or leisure reasons, this increased to 3 in 5 at night. During the day, there was a greater focus on sightseeing – driven largely by domestic and international visitors to the precinct

Shopping was less of a focus… possibly driven by the tourist heavy focus of the shopping offering in the northern CBD area – particularly in The Rocks and Circular Quay, which are heavily geared towards the tourist market

Northern CBD is more likely to be visited by groups than other areas… while individual persons were the largest visitor group overall (1 in 3), they were 10p.p. less common than the index across all precincts. In contrast, visitors to the northern CBD were more likely to be with their spouse/partner (7p.p. above the index) or other family members (4p.p. above the index). Specifically, domestic and international visitors were more likely to be in the area with a spouse/partner compared with Sydneysiders who were more likely to be with friends or work colleagues

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Social / leisure	54	+10	49	60	48	61	50	55	65	51
Sightseeing	33	+23	40	25	29	37	22	18	46	70
Business	21	+1	26	15	27	14	23	26	17	9
Passing through	9	-6	9	8	10	7	11	8	7	7
Catch public transport	6	-2	6	5	6	6	8	6	3	6
Shopping	5	-4	7	3	4	6	3	2	7	14
Appointment	1	-2	1	1	2	0	2	1	1	0

Company in the precinct (%)

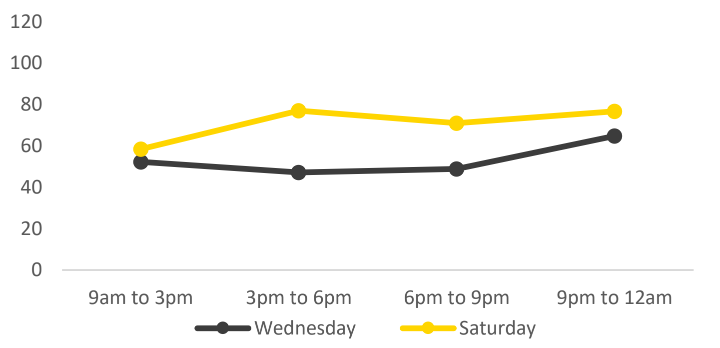
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
On my own	36	-10	40	31	40	32	35	37	30	39
Friends	31	0	27	34	25	37	35	34	28	21
Spouse/ partner	21	+7	17	26	21	22	22	13	31	33
Other family members	9	+4	9	9	8	10	2	11	13	10
Work colleagues	8	+2	9	7	10	5	9	11	0	3
Children (<15 years)	1	0	1	2	0	2	1	1	3	1
Tour	1	+1	1	2	1	2	1	0	3	4
Clients	0	0	0	0	0	0	0	0	1	0

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100)
Q1, Q6

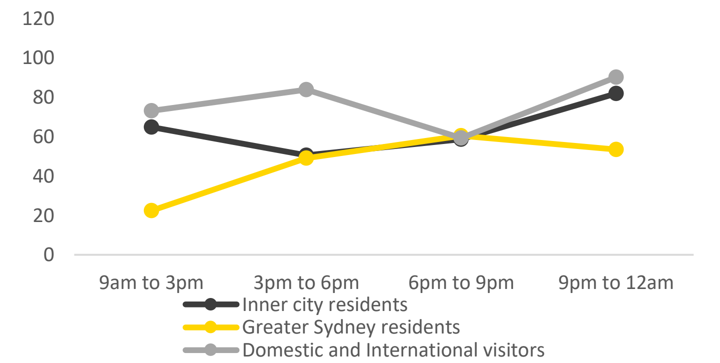
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Indicative spend was highest on the weekend and amongst domestic and international visitors

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Visitor types ($)



Average total spend in the area ($)

$61

Average total spend in the area (Index $60)

$58 Day time	$65 Night time	$53 Wednesday	$71 Saturday
$64 Inner city	$49 Greater Sydney	$92 Domestic visitors	$66 International visitors

Spend peaked in the evening… indicative spend reached its highest level between the hours of 9pm and 12am on both Wednesday and Saturday nights ($65 and $77 respectively). With that in mind, spend was highest amongst domestic visitors ($92) and international visitors ($66) – who were more likely to visit during the day. This result highlights the importance of maintaining a strong value offering for both daytime and night time visitors in the area

Spend also varied across demographics… with men indicating they spent significantly more than women ($70 compared to $50) and people under the age of 30 spending indicatively less than other age groups ($53 compared to $69)

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Cultural offerings were a key attraction for visitors to the northern CBD

Northern CBD

Dining, coffee and beverages were the most common activities… with 6 in 10 indicating they bought food from a restaurant or café while in the northern CBD area. Similarly, 2 in 5 said they purchased coffee or tea while in the precinct, and 1 in 3 visited a licensed establishment

Behavioural profiles shifted based on visitor demographics… with domestic and international visitors more likely to purchase food, visit cultural attractions or go shopping while in the area. Women (25%) were more likely to browse or buy from shops than men (14%) while those under the age of 30 were more likely to visit a bar or pub (39% compared to 28% across all other age groups) and those aged 50+ were more likely to view or visit cultural attractions (32% compared to 21% across all other age groups)

Indicative spend was maximised amongst those who did multiple activities… while in the area, it is important to encourage visitors to undertake multiple activities. Visitors who only completed a single activity (e.g. having food) in the northern CBD area had significantly lower indicative spend ($46). In contrast, people who completed multiple activities recalled spending substantially more ($78)

Activities in the area (%)

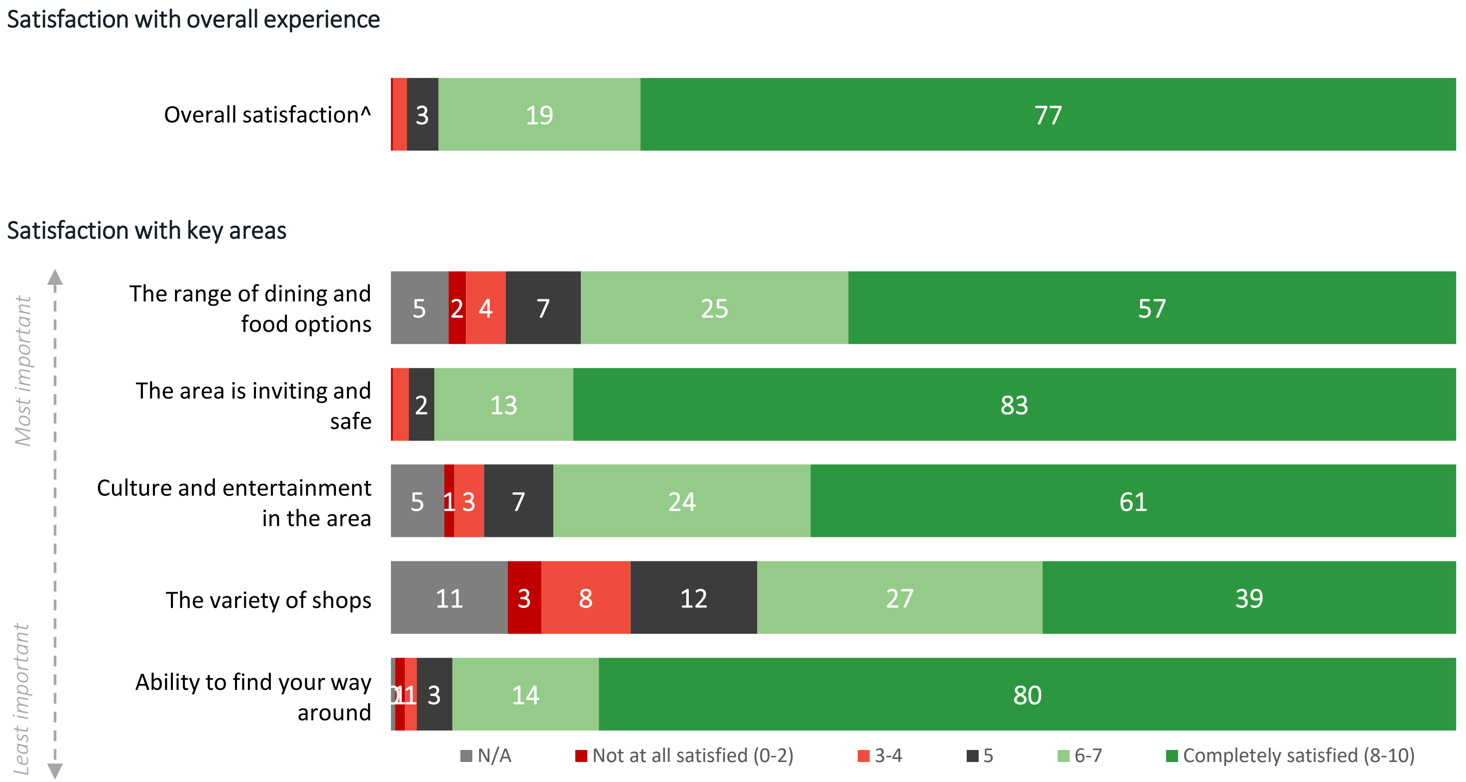
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Food	57	+4	64	50	52	62	53	50	79	64
Coffee/tea	43	+1	55	31	44	43	47	41	49	41
Bar/pub	33	0	26	41	33	33	27	34	39	35
Cultural attractions	22	+11	29	15	19	27	22	14	35	34
Shopping	18	-2	26	11	16	21	13	13	32	29
Event, business meeting or conference	15	+3	12	19	16	14	20	16	18	5
Show friends/relatives around	15	+2	14	15	14	16	18	16	17	7
Overnight stay	13	+5	15	11	10	16	4	3	28	37

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Northern CBD generates positive levels of satisfaction overall, with the area seen as inviting, safe and easy to navigate

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Overall satisfaction^	+19	74	79	77	76	67	78	82	83
The range of dining and food options	+2	49	66	59	55	56	57	52	61
The area is inviting and safe	+20	83	83	84	82	84	81	80	89
Culture and entertainment in the area	+16	56	65	59	62	62	62	51	62
The variety of shops	-2	30	48	42	36	40	37	34	45
Ability to find your way around	+8	80	81	78	83	85	81	79	76

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Opportunity exists to improve the shopping offer with a wider range/availability of shops and better value for money

Northern CBD

Shopping seen to be a key development opportunity… although satisfaction levels were generally positive across the precinct, only 2 in 5 were satisfied with the variety of shops in the area. As a result, when asked to identify opportunities that could have improved their time in the northern CBD area, 1 in 4 indicated that a wider range and availability of shops should be a key consideration for the precinct. This finding wasn't consistent across all visitor types however, with domestic visitors (10%) and those aged 50+ (17%) substantially less likely to mention it as an opportunity

Delivering value also a consideration… while developing the shopping offering was important for many, 1 in 4 respondents also felt that delivering better value-for-money should be a key consideration for operators in the area – this was 8p.p. higher than the index across all precincts. Similar to the above point, those aged 50+ were less likely to highlight value as a key factor (15% compared to 27% across all other age groups)

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Wider range and availability of shops	26	-4	25	27	31	21	31	30	10	24
Better value for money/cheaper	25	+8	25	26	27	23	25	26	24	23
Improved entertainment & cultural offerings	21	0	22	20	20	22	28	20	15	19
More food options	19	-1	22	15	20	17	24	19	18	11
Construction completion	16	+3	22	11	16	17	19	19	10	10
More parks/green areas	12	-2	13	11	12	12	16	12	4	13
Improved cleanliness	12	-2	16	7	10	13	16	11	13	8
More bars/beverage options	10	-3	10	10	11	8	14	10	7	7
More parking available	9	-4	9	9	10	8	7	13	11	1
Better signage/ wayfinding	9	+1	10	7	9	8	4	7	14	15
Improved transportation to/from	6	-5	6	6	5	7	8	7	4	2
Improved security/safety	3	-8	4	2	3	3	2	4	6	1

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Walking substantially more common during the day, particularly amongst international visitors

Northern CBD

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Walk	45	-2	54	35	52	38	52	30	56	65
Train	45	+12	48	43	48	43	42	56	41	28
Bus	14	-6	16	13	15	14	15	16	8	12
Drive	11	0	9	13	9	13	7	19	8	0
Ferry	9	+7	9	9	8	10	8	9	14	7

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Train	46	+15	48	43	48	43	44	57	38	27
Walk	40	-5	48	31	44	35	40	26	51	63
Bus	16	-7	14	17	15	17	18	19	8	11
Drive	12	+1	9	15	10	14	7	21	7	1
Ferry	9	+7	10	7	7	11	6	9	15	6

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Knowledge of the area	64	-8	60	67	67	60	79	80	42	20
Phone apps / maps	40	+2	42	38	34	47	27	33	55	63
Signage in the area	8	+3	11	5	7	8	2	3	18	18
Asked friends/family for directions	6	+3	5	8	5	8	5	5	7	10
Printed map / guide book	6	+3	9	3	5	6	1	1	6	23
Asked staff / officials for guidance	4	+2	7	2	5	3	0	0	10	15
Tour guide	2	+1	3	2	2	2	1	0	3	9

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Personal recommendations, social media and Google searches were key information channels for northern CBD visitors and residents

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
Recommended by friends, family or work colleagues	48	-1	43	54	49	47	41	52	41	53
Social media	38	-12	45	29	41	34	48	43	15	28
Search engines	37	+4	37	38	34	41	37	35	45	38
Travel websites	14	+4	17	10	11	16	11	6	13	35
Other websites	11	-2	12	9	9	12	13	11	10	7
Event websites	8	-2	10	7	9	8	12	11	1	2
Newspapers	8	-1	9	7	9	7	12	9	7	2
City of Sydney website	7	-1	7	7	7	7	7	8	3	7
Tourist flyers	7	+3	9	5	5	9	6	2	13	16
TV programmes	4	-1	5	3	5	3	5	4	4	3
Radio	3	-1	4	2	4	2	3	4	1	1
Membership emails (e.g. Opera House)	2	-1	4	0	2	3	4	3	0	0
Travel agents or tour guides	1	+1	1	1	0	2	0	2	3	0

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100)
D1

EY Sweeney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

NORTHERN CBD

CENTRAL CBD

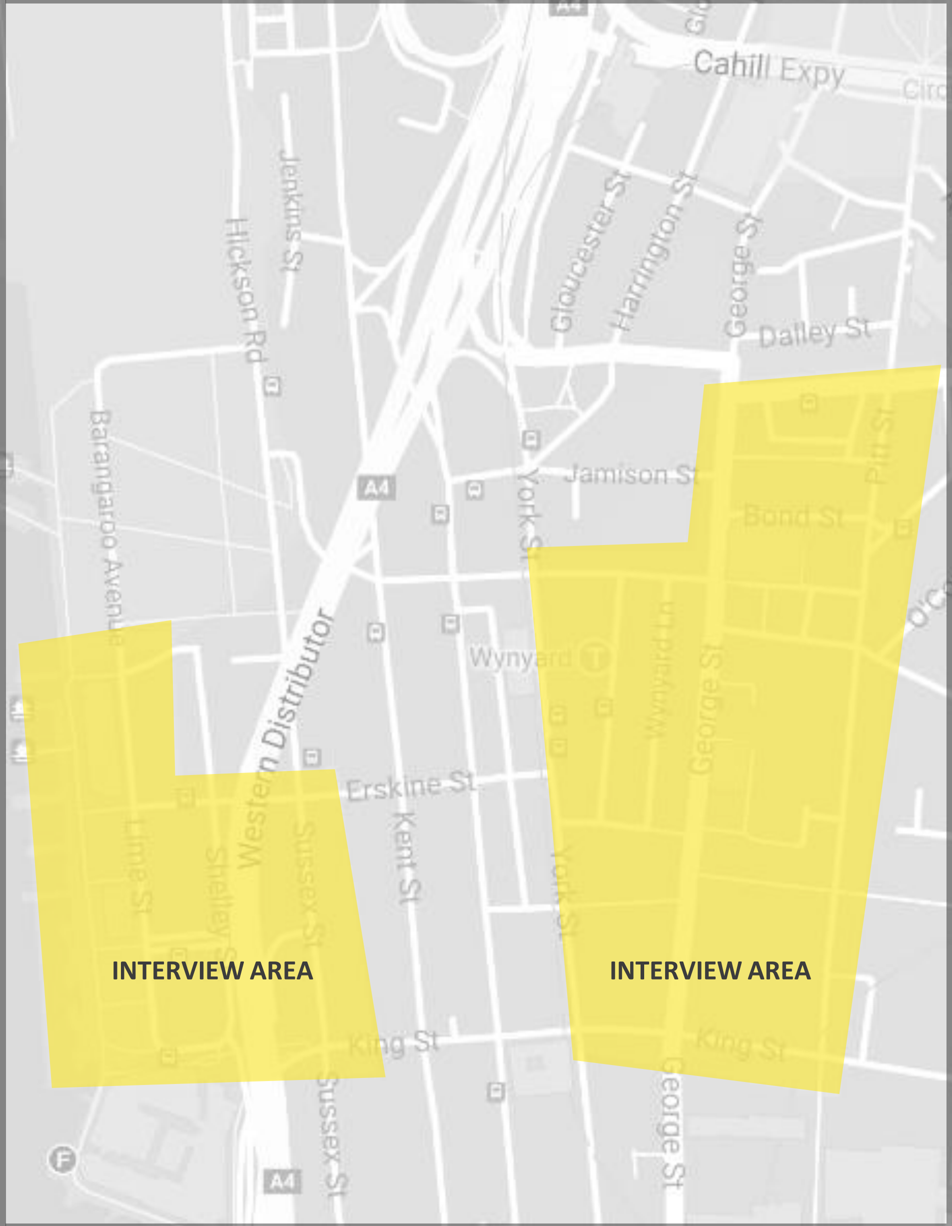
SOUTHERN CBD

POTTS POINT AREA

OXFORD STREET AND SURROUNDS

NEWTOWN AND SURROUNDS

PYRMONT AND SURROUNDS



CBD centre area (For example, the area south of Hunter Street to Park Street and west to King Street Wharf - including Wynyard and King Street Wharf)

The central CBD is a daytime hub for people living in the greater Sydney area

Central CBD

Visitors to central CBD skew towards people living in the greater Sydney area… around half of people in the central CBD live in the greater Sydney region, 15p.p. higher than the index. Correspondingly, inner city residents were 15p.p. less likely to visit the central CBD. Interestingly, domestic visitors to Sydney were more likely to visit the central CBD after 6pm – possibly due to the variety of night time activities available in the area, coupled with a large amount of commercial accommodation in the precinct

Male skew in central CBD evident… as with the northern CBD, men were more prevalent in the central CBD area, accounting for approximately 3 in 5 people

Work was a key reason to be in the area… perhaps unsurprisingly, a large proportion of people in the precinct worked in the area (51% during the day and 38% in the evening). While this figure was much higher during the week (50%), the proportion of workers in the area during the weekend was still very high, with 2 in 5 people indicating they worked in the immediate area

High proportion of workers drive frequency… the relatively high prevalence of people who worked in the area appeared to drive visitation frequency, with more than half visiting the central CBD at least once a week. This figure was significantly higher during the week, with 63% of people surveyed on a Wednesday indicating they visited the area more than once a week, while only 48% of visitors on the weekend go more than once a week

International visitors often here for the first time… around half of international visitors were in the area for the first time. This finding highlights the importance of ensuring effective wayfinding is available to visitors in this part of the city

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	63	+3	62	64	64	62
Female	37	-3	38	36	36	38
Under 30	52	-1	51	52	50	54
30-49	37	+4	33	41	40	34
50+	11	-2	16	6	10	12
Inner city	33	-15	31	35	32	34
Greater Sydney	52	+15	56	47	52	51
Domestic visitors	7	0	5	10	7	8
International visitors	8	0	8	8	9	7
<$50K	30	-7	31	30	32	29
$50K to $100K	25	-1	23	26	29	20
$100K+	26	+5	29	23	24	27
Refused	19	+3	17	22	15	24
Work in the immediate area	45	+10	51	38	50	39

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260).
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Central CBD

A majority visit the central CBD more than once a week

Visitation frequency (%)

Overall

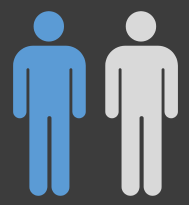
	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	+3	+2	0	0	-3	-3	0
Day time	60	13	5	8	8	4	2
Night time	51	14	5	8	12	9	1
Wednesday	63	10	4	5	9	8	0
Saturday	48	16	5	12	12	5	2
Inner city	66	13	5	7	6	3	0
Greater Sydney	62	15	6	9	7	1	0
Domestic visitors	11	13	5	11	42	11	8
International visitors	14	7	0	5	17	50	7

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, Greater Sydney=268, Domestic visitors=38, International visitors=42)
Q2

Central CBD features a high proportion of regular workers and business activities in the area, particularly weekdays where…

1 in 2

visitors work in the immediate vicinity



Coffee, dining and pubs catering to these workers and other visitors are key activities in the area

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social and leisure activities were more prevalent amongst night time visitors

Central CBD

Social and leisure activities were the most common activities undertaken in the precinct… this result was driven largely by night time visitors, with around half indicating they were in the area for this reason after 6pm. In contrast, daytime visitors were significantly more likely to be in the precinct for business reasons

International visitors more likely to sightsee… with 2 in 5 indicating this was the main reason for visiting the central CBD

Social and leisure activities often undertaken in groups… although overall, people were more likely to visit the central CBD area by themselves (42%), this was heavily dependent on their main reason for being in the area. For example, people who visited the central CBD area for leisure or social reasons were significantly more likely to be in the area with their friends (50%) or their spouse or partner (28%). In contrast, those who visited the area for business purposes were significantly more likely to be by themselves (66%) or with work colleagues (20%)

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Social / leisure	44	0	35	52	29	58	44	41	55	50
Business	24	+4	31	16	35	13	19	29	18	17
Passing through	15	+1	11	19	15	16	22	14	8	2
Catch public transport	14	+6	13	16	18	11	17	16	3	5
Sightseeing	8	-2	8	8	6	10	6	3	13	43
Shopping	8	-1	11	5	4	12	9	6	11	12
Appointment	4	+1	4	3	5	2	4	4	3	0

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, *Greater Sydney=268, Domestic visitors=38, International visitors=42)
Q1, Q6

Company in the precinct (%)

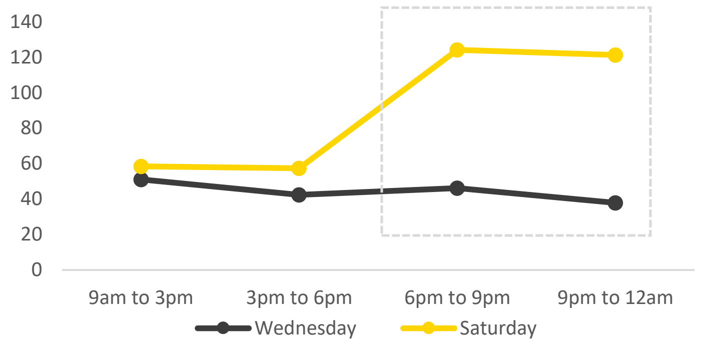
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
On my own	42	-4	46	37	47	36	41	47	24	24
With friends	29	-2	21	37	22	37	33	27	32	21
Spouse / partner	17	+3	17	18	14	21	16	14	32	31
With work colleagues	7	+1	10	5	10	4	7	8	3	10
Other family	4	0	4	5	4	5	4	4	8	10
With children (<14yrs)	2	+1	4	1	2	3	1	3	5	0
With clients	1	0	1	1	2	0	1	1	0	2
With tour	0	0	0	0	0	0	0	0	0	2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

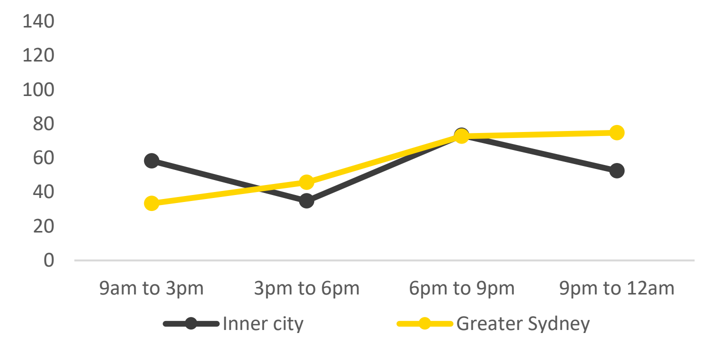
Indicative spend driven by visitors to the area on Saturday evenings

Central CBD

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Visitor types ($)



Activities impacted on indicative spend outcomes… activities had a notable impact on spending behaviour in the central CBD. For example, people who visited a pub had significantly higher indicative spend ($98), as did people who viewed or listened to cultural attractions ($118) compared to people who bought food from a restaurant or café in the area ($89), bought/drunk coffee or tea ($67) or attended an event, business meeting or conference ($49). As with the northern CBD area, visitors who engaged in multiple activities in the central CBD recorded substantially higher indicative spend than people who only undertook one activity ($86 compared to $51), highlighting the importance of engaging visitors with multiple experiences in the area

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, Greater Sydney=268, Domestic visitors=38, International visitors=42). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Food and beverage was purchased/consumed by the majority of people when visiting the area

Central CBD

Dining is a key part of the central CBD experience… with around 3 in 5 visitors to the area indicating they purchased food from a restaurant or café while there, this figure increased to three-quarters amongst domestic and international visitors. Interestingly, this result did not change based on the day of the week or the time of day – highlighting the integral role that dining has to play in the central CBD precinct

Cafes are a daytime destination, while bars and pubs are an evening hotspot… 6 in 10 daytime visitors indicated they bought coffee or a drink in the area (compared to 4 in 10 night time visitors). This behaviour shifted in the evening however, with half visiting a bar or pub. Licensed venues were also a hotspot for domestic visitors, with 3 in 5 indicating they visited a bar or pub while in the area

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Food	59	+6	60	59	54	64	54	58	76	74
Coffee/tea	51	+9	61	41	54	48	44	54	50	62
Bar/pub	38	+4	25	50	33	42	37	34	63	43
Shopping	21	0	24	18	21	21	19	19	29	36
Event, business meeting or conference	16	+4	18	13	23	8	17	16	13	12
Show friends/relatives around	14	+1	13	14	11	17	20	11	16	2
Cultural attractions	11	0	12	10	14	8	12	7	16	24
Overnight stay	8	0	7	9	6	10	5	2	47	26

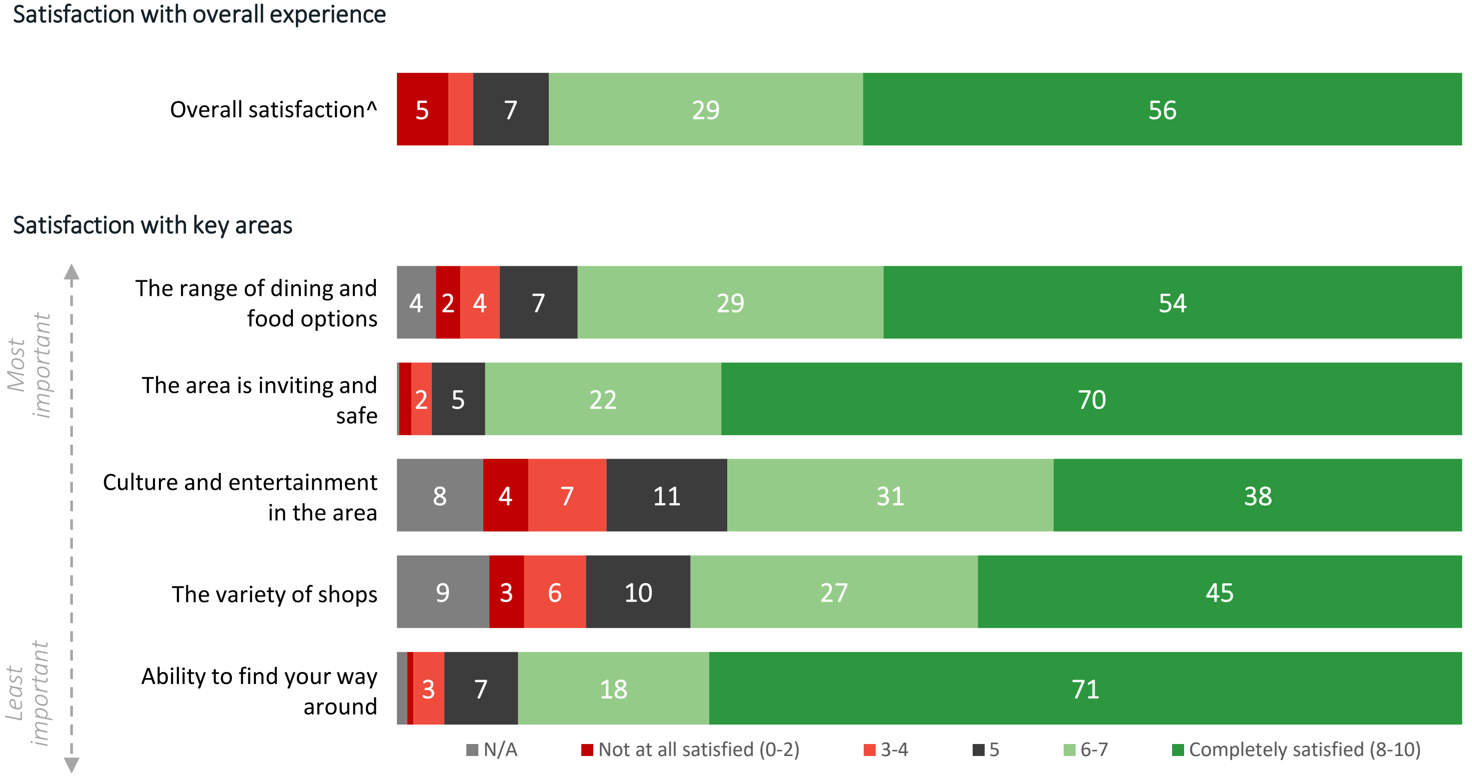
Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, *Greater Sydney=268, Domestic visitors=38, International visitors=42)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Overall satisfaction with the central CBD is high, but there is an opportunity to optimise culture and entertainment particularly during the day

Central CBD

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Overall satisfaction^	-1	52	61	53	60	55	52	66	79
The range of dining and food options	-1	50	58	51	57	56	52	68	50
The area is inviting and safe	+7	69	70	73	67	68	68	76	79
Culture and entertainment in the area	-6	32	45	41	36	40	35	42	45
The variety of shops	+5	41	50	44	47	51	41	63	33
Ability to find your way around	-2	71	71	73	68	74	70	61	74

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, *Greater Sydney=268, Domestic visitors=38, International visitors=42)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Diversifying and developing shopping and food offerings are key opportunities, as well as completing construction

Central CBD

Construction a key consideration for many in the area… around a quarter of visitors felt that completing construction projects in the precinct (e.g. the light rail) would have a positive impact on their experience (13p.p. higher than the index across all precincts). Along with this, visitors also felt that a wider range and availability of shops would improve the central CBD. Interestingly, 1 in 10 felt the precinct could also have better signage/wayfinding – 4p.p. higher than the index across all precincts

Optimising the culture and entertainment experienced could help to drive satisfaction levels… around 1 in 6 indicated that improving entertainment and cultural offerings in the area would be positive. This finding closely aligns with satisfaction outcomes, with just under 2 in 5 visitors indicating they were satisfied with this aspect of their trip – 6p.p. below the index across all precincts, and lower than other satisfaction elements tested in the central CBD (e.g. the variety of shops, the range of dining and food options)

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Wider range and availability of shops	28	-2	29	28	23	33	28	28	21	40
Construction completion	26	+13	23	30	25	27	31	25	24	17
More food options	20	0	18	23	17	23	19	20	11	36
Improved entertainment & cultural offerings	18	-3	16	20	17	19	22	16	16	19
Better value for money/cheaper	14	-2	9	20	16	12	13	15	16	14
More bars/beverage options	13	0	10	17	13	14	16	13	5	12
Improved cleanliness	12	-2	16	8	12	12	11	14	13	5
Better signage/wayfinding	11	+4	11	11	11	12	12	10	21	12
More parks/green areas	11	-3	11	11	12	10	15	10	8	5
Improved transportation to/from	11	0	5	17	10	12	11	12	8	7
More parking available	11	-2	11	11	10	12	10	12	13	2
Improved security/safety	7	-4	5	10	8	7	6	9	3	5

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, *Greater Sydney=268, Domestic visitors=38, International visitors=42)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Taking the train and walking were the key methods used to access or depart the area – navigation was primarily driven by prior knowledge and phone apps/maps

Central CBD

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Train	39	+6	43	34	36	41	35	44	34	19
Walk	37	-10	42	33	39	35	42	28	42	71
Bus	26	+6	28	25	32	21	20	35	5	14
Drive	11	0	10	12	8	14	7	14	21	0
Taxi/Uber	6	0	4	7	4	7	7	2	13	14

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Train	36	+5	44	29	36	37	36	42	21	17
Walk	33	-11	39	27	32	34	37	25	39	67
Bus	29	+7	28	30	34	25	21	39	11	14
Drive	11	0	11	11	8	13	8	13	16	2
Taxi/Uber	8	+1	3	13	7	9	8	6	18	14

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Knowledge of the area	71	-1	72	70	69	73	76	76	54	33
Phone apps / maps	40	+2	40	41	39	42	37	36	59	64
Signage in the area	8	+2	7	8	4	11	2	8	22	17
Asked friends/family for directions	4	0	4	3	3	4	2	3	11	5
Printed map / guide book	3	0	3	2	2	3	1	1	3	19
Asked staff / officials for guidance	2	0	1	2	2	2	1	1	5	5
Tour guide	1	0	0	2	2	1	0	1	0	10

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, *Greater Sydney=268, Domestic visitors=38, International visitors=42)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Word of mouth and social media were key methods of sourcing activities to do in the central CBD

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Recommendations by friends, family or work colleagues	49	0	49	48	43	54	55	49	29	40
Social media	47	-2	47	48	51	43	49	53	24	29
Search engines	35	+2	38	33	35	36	32	35	47	45
Other websites	13	+1	15	11	12	15	12	14	21	10
City of Sydney website	12	+3	12	11	12	11	10	13	5	17
Event websites	11	0	11	11	10	12	12	10	8	10
Travel websites	9	0	11	8	9	10	9	9	0	19
Newspapers	6	-3	8	5	7	5	6	8	0	2
TV programmes	6	0	7	4	5	6	7	5	5	2
Radio	4	0	4	4	5	3	6	3	0	2
Membership emails (e.g. Opera House)	3	0	4	3	5	2	4	4	0	0
Tourist flyers	3	-1	3	3	3	3	4	1	0	10
Travel agents or tour guides	0	0	1	0	0	1	0	1	0	0

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, *Greater Sydney=268, Domestic visitors=38, International visitors=42)
D1

EY Sweeney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

NORTHERN CBD

CENTRAL CBD

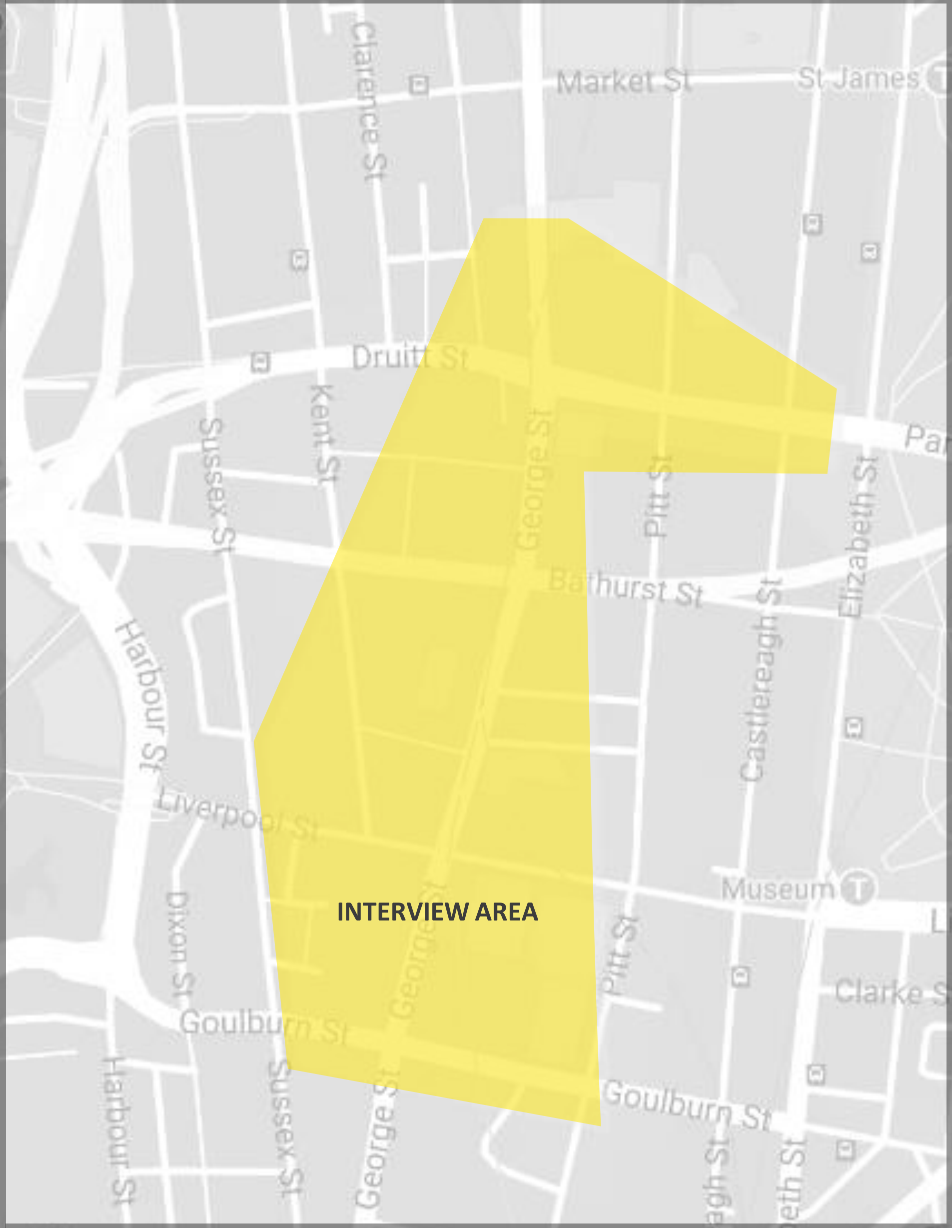
SOUTHERN CBD

POTTS POINT AREA

OXFORD STREET AND SURROUNDS

NEWTOWN AND SURROUNDS

PYRMONT AND SURROUNDS



CBD south area (For example, the area south of Park Street to Hay Street & Haymarket - including Town Hall and World Square)

The southern CBD area attracts a younger profile both during the day and at night likely due to its proximity to tertiary education institutions in the area

Southern CBD

Younger demographic skew in the southern CBD… in total, 2 in 3 visitors to the area were under the age of 30 – 12 p.p. higher than the index across all precincts. This is particularly prevalent at night, with younger visitors accounting for 7 out of every 10 people in the precinct. As a result, around half of the people in the area had an annual household income of less than $50,000 (10p.p. higher than the index)

Visitors were more likely to be male… similar to other CBD areas, the southern CBD was heavily skewed towards men, accounting for almost 2 in every 3 people in the area

Marginal skew towards regular or repeat visitors… with around 3 in 5 visiting the area once a week or more (5p.p. higher than the index across all precincts). This frequency is largely driven by weekday visitors who live in the inner city area (64% and 71% respectively)

Locals more likely to visit on the weekend… only a third of those in the area during the week lived in or around the inner city. In contrast, almost half of weekend visitors live in the inner city – an interesting result when compared to other precincts. This finding may be a reflection of the types of shops available in the area (e.g. Paddy's Markets)

Profile of visitors in the precinct (%)

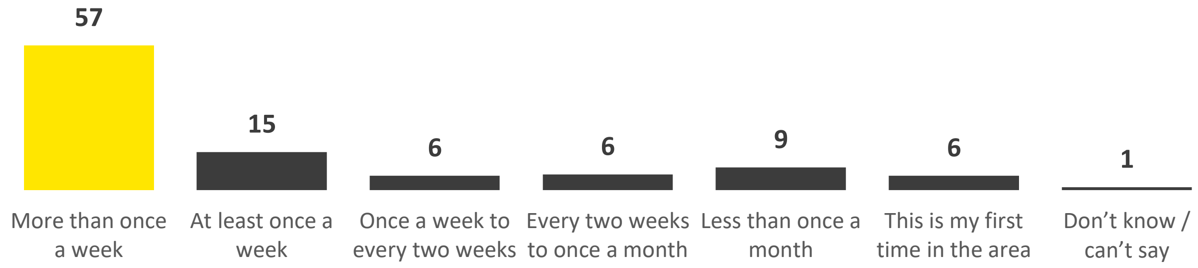
	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	64	+3	63	64	64	64
Female	36	-3	37	36	36	36
Under 30	65	+12	60	70	61	69
30-49	28	-6	30	25	29	26
50+	7	-6	10	4	10	5
Inner city	41	-7	39	44	36	46
Greater Sydney	43	+6	47	39	47	38
Domestic visitors	10	+2	10	10	10	10
International visitors	6	-2	5	8	7	5
<$50K	47	+10	42	52	39	55
$50K to $100K	19	-6	19	19	21	18
$100K+	20	-1	22	17	25	14
Refused	14	-3	16	12	15	14
Work in the immediate area	39	+5	40	39	44	34

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269). Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Visitation to the area is frequent for the majority, with around 2 in 3 visiting multiple times a week

Visitation frequency (%)



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	+5	+4	+1	-2	-5	-4	0
Day time	58	12	6	7	9	7	1
Night time	57	19	5	6	8	4	1
Wednesday	64	12	4	4	9	7	0
Saturday	51	18	8	9	9	4	2
Inner city	71	16	2	5	2	4	0
Greater Sydney	58	16	10	6	6	3	0
Domestic visitors	22	13	4	9	36	9	7
International visitors	21	6	3	6	29	32	3

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, Greater Sydney=235, Domestic visitors=55, International visitors=34)
Q2

Demographic profile of Southern CBD is skewed towards younger visitors, with

2 in 3
under 30 years old

Whilst F&B related activities are the most common, shopping is also a key strength compared to other precincts...

1 in 4
visitors shopped in the area
(+6 p.p. above index)

3 in 5
were highly satisfied with the range of shopping options
(+17 p.p. above index)

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

A mix of shopping, work and social activities make the southern CBD an attractive location to younger visitors

Southern CBD

Leisure activities are a critical factor… with 2 in 5 people indicating they were in the area for this reason. As with other CBD areas, the proportion who were in the area for social and leisure purposes increased significantly in the evening, lifting from 28% during the day to 56% after 6pm

When compared to the northern and central CBD areas, this increase was relatively large, highlighting a strong nightlife offering in the area

Daytime visitors more likely to be individuals… with half of daytime visitors in the area by themselves. However, this dynamic changes noticeably in the evening, with around half visiting in the area with their friends after 6pm. As with the central CBD, this shift was largely affected by the types of activities being undertaken

For example, people in the area for social or leisure purposes were significantly more likely to visit with friends (50%), while those people in the area for business were more likely to be by themselves (66%)

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Social / leisure	42	-2	28	56	33	50	40	41	45	53
Business	22	+2	28	15	31	13	18	26	33	6
Shopping	14	+5	15	13	11	17	15	14	5	18
Passing through	13	-2	12	14	14	12	15	12	7	9
Sightseeing	8	-2	12	5	6	11	7	5	15	29
Catch public transport	6	-2	6	6	6	6	4	9	2	6
Appointment	3	0	4	1	3	2	2	3	4	0

Company in the precinct (%)

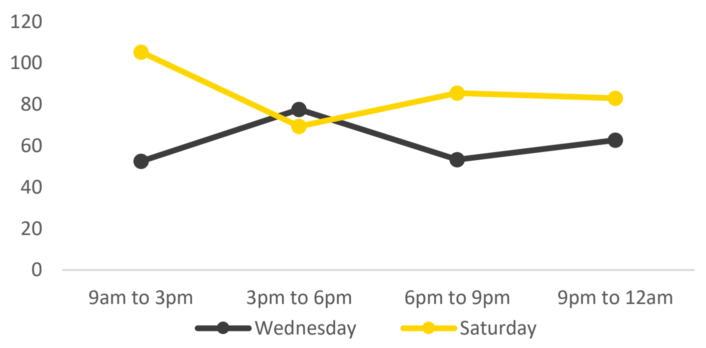
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
On my own	43	-3	54	32	51	36	42	46	42	38
With friends	37	+6	28	48	31	45	38	38	27	41
Spouse / partner	11	-3	7	14	8	13	10	7	24	18
With work colleagues	5	-1	6	4	7	3	7	4	7	0
Other family	5	0	5	5	4	5	5	4	5	6
With children (<14yrs)	1	0	1	1	1	1	1	1	2	0
With clients	1	0	1	1	2	0	0	1	2	0
With tour	0	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, *Greater Sydney=235, Domestic visitors=55, International visitors=34)
Q1, Q6

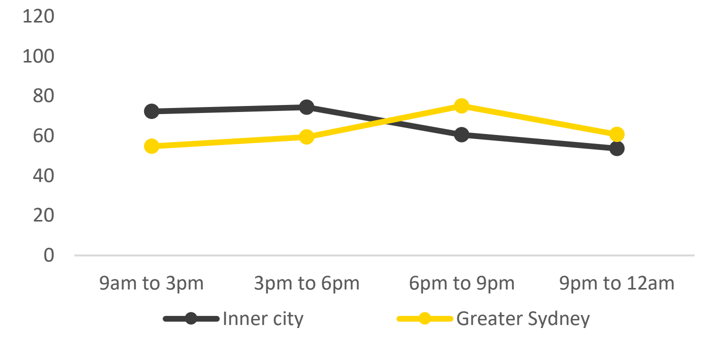
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Strong indicative spend levels, driven by domestic and international visitors

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Visitor types ($)



Indicative spend higher amongst those engaging in social and leisure activities… people in the area for social reasons had substantially higher indicative spend outcomes. For example, people who visited a bar/pub had an indicative spend of $112 and those who visited cultural attractions in the area had an indicative spend of $81. In contrast, those who purchased food from a restaurant or café ($88) had lower indicative spends overall. As with other parts of the CBD, visitors who engaged in more than one activity had substantially higher indicative spend outcomes ($97 compared to $50 amongst those who only did one activity in the area)

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, *Greater Sydney=235, Domestic visitors=55, International visitors=34). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Majority purchase food from restaurants or cafes while in the area

Southern CBD

Strong F&B activity in the area… while in the southern CBD, almost 3 in 5 visitors bought food from a restaurant or café. This was marginally lower amongst international visitors, with just under half of this group choosing to dine in the area. As with other parts of the CBD, drinking coffee and tea was significantly more common during the day, while visiting bars and pubs was more common in the evening and on the weekends

Age influenced behavioural profile of people in the area… with visitors aged 50+ indicatively more likely to buy food from a restaurant or café, (67% compared to 58% across other age groups). Alternatively, younger visitors were substantially more likely to visit a bar or pub (37% compared to 28% of those aged 50+)

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Food	57	+4	56	59	56	59	59	56	60	47
Coffee/tea	45	+3	53	37	44	46	47	44	45	44
Bar/pub	30	-3	22	38	23	37	27	29	38	44
Shopping	27	+6	31	23	25	30	28	25	29	29
Event, business meeting or conference	11	-1	12	9	12	10	7	13	24	0
Show friends/relatives around	9	-3	11	8	9	10	11	9	5	12
Cultural attractions	8	-3	9	6	10	5	7	8	5	15
Overnight stay	7	-2	7	6	8	6	5	2	24	24

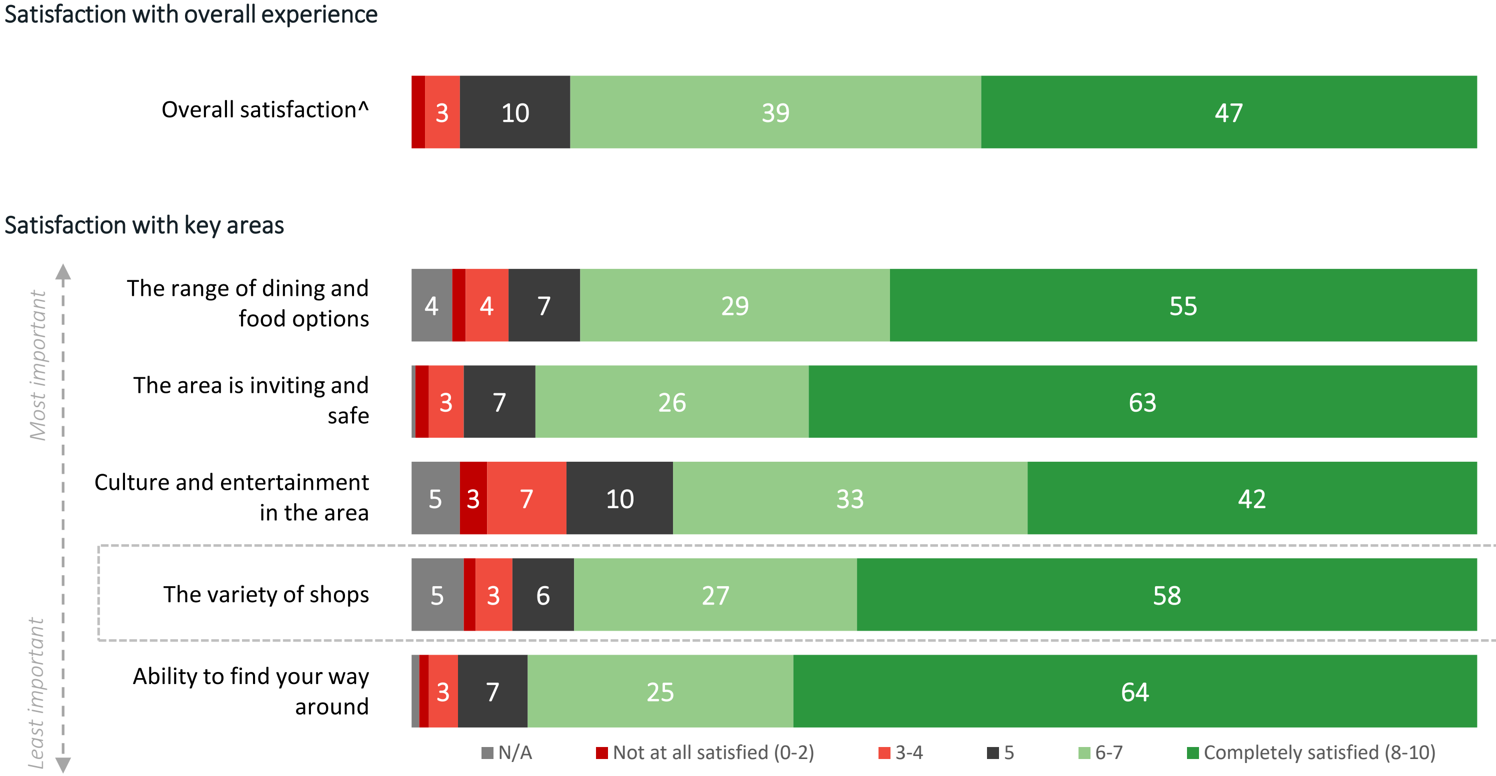
Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, *Greater Sydney=235, Domestic visitors=55, International visitors=34)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The shopping offering is a key strength for the southern CBD, rating 17p.p. higher than the index across all precincts

Southern CBD

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Overall satisfaction^	-11	46	47	48	45	46	41	53	74
The range of dining and food options	0	54	56	50	60	53	55	62	56
The area is inviting and safe	0	60	65	61	64	62	64	55	71
Culture and entertainment in the area	-2	43	41	43	41	42	42	35	56
The variety of shops	+17	60	56	53	64	58	57	58	65
Ability to find your way around	-8	65	64	69	59	70	63	45	62

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, *Greater Sydney=235, Domestic visitors=55, International visitors=34)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Despite their satisfaction with the southern CBD shopping offer, visitors felt the variety of shops could be improved

Southern CBD

Construction also a key factor in the south… as with the central CBD, construction (e.g. the light rail) was a key consideration for many in the area. In total, 3 in 10 identified this as a key opportunity for improvement – 17p.p. higher than the index across all precincts. This was less of a concern for inner city residents however, with only 1 in 4 feeling this was a key development opportunity

Locals interested in more food options… inner city residents felt that the variety of food in the area could be improved, with 3 in 10 indicating this could be a key building area for the precinct

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Wider range and availability of shops	31	+1	28	34	28	34	38	29	18	26
Construction completion	30	+17	29	32	30	30	24	35	33	35
More food options	25	+5	22	29	26	25	30	24	16	21
Improved entertainment & cultural offerings	21	0	16	26	21	20	24	19	13	18
Better value for money/cheaper	17	0	15	19	17	17	16	17	18	15
More parks/green areas	13	0	13	13	14	12	12	14	16	12
More parking available	13	0	13	14	14	13	12	15	18	0
Improved cleanliness	13	-1	13	13	12	14	14	11	18	9
More bars/beverage options	13	0	8	17	13	12	16	11	5	9
Improved transportation to/from	12	+1	11	13	12	12	10	14	13	12
Improved security/safety	12	0	12	12	13	11	11	14	5	12
Better signage/wayfinding	9	+2	7	11	9	9	6	9	22	12

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, *Greater Sydney=235, Domestic visitors=55, International visitors=34)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Knowledge of the area and phone apps/maps are key navigation tools for visitors to the southern CBD

Southern CBD

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Walk	49	+2	45	54	56	43	65	35	38	62
Train	40	+7	46	34	39	41	24	57	44	24
Bus	20	0	23	16	18	22	18	24	15	12
Drive	9	-2	10	9	9	10	2	15	22	3
Taxi/Uber	3	-3	3	3	3	3	3	2	5	9

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Walk	46	+2	42	50	52	39	59	31	38	71
Train	41	+10	46	36	42	40	28	57	40	21
Bus	20	-2	22	18	18	22	17	25	13	18
Drive	10	-1	10	9	9	10	2	15	22	3
Taxi/Uber	4	-3	3	5	3	5	2	4	9	9

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Knowledge of the area	74	+3	74	75	77	72	80	80	58	21
Phone apps / maps	39	+1	36	43	36	43	33	35	60	76
Signage in the area	6	+1	5	6	7	4	3	5	11	21
Asked friends/family for directions	4	0	2	5	3	4	3	3	5	12
Printed map / guide book	1	-1	2	1	2	1	1	0	2	9
Asked staff / officials for guidance	1	-1	1	2	1	1	1	0	2	9
Tour guide	0	-1	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, *Greater Sydney=235, Domestic visitors=55, International visitors=34)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social media was the main channel used by visitors to find out about things to do in the area

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom-estic	Intern-ational
Social media	56	+7	55	58	52	60	55	62	49	38
Recommended by friends, family or work colleagues	45	-4	40	50	43	47	42	48	44	47
Search engines	32	-1	31	33	30	35	26	38	33	35
Other websites	14	+1	15	12	13	14	15	13	9	12
Travel websites	13	+3	12	14	12	13	12	11	9	38
Event websites	12	+2	11	14	14	11	12	12	11	15
Newspapers	11	+2	13	9	9	14	9	14	11	6
City of Sydney website	9	+1	9	9	9	8	8	9	11	12
TV programmes	7	+1	7	6	7	6	5	10	2	0
Membership emails (e.g. Opera House)	3	0	2	4	4	3	2	5	4	0
Tourist flyers	3	-1	5	2	2	4	4	2	0	6
Radio	3	0	3	3	4	2	3	4	2	0
Travel agents or tour guides	1	0	1	0	1	0	0	0	4	0

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226,* Greater Sydney=235, Domestic visitors=55, International visitors=34)
D1

EY Sweeney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

NORTHERN CBD

CENTRAL CBD

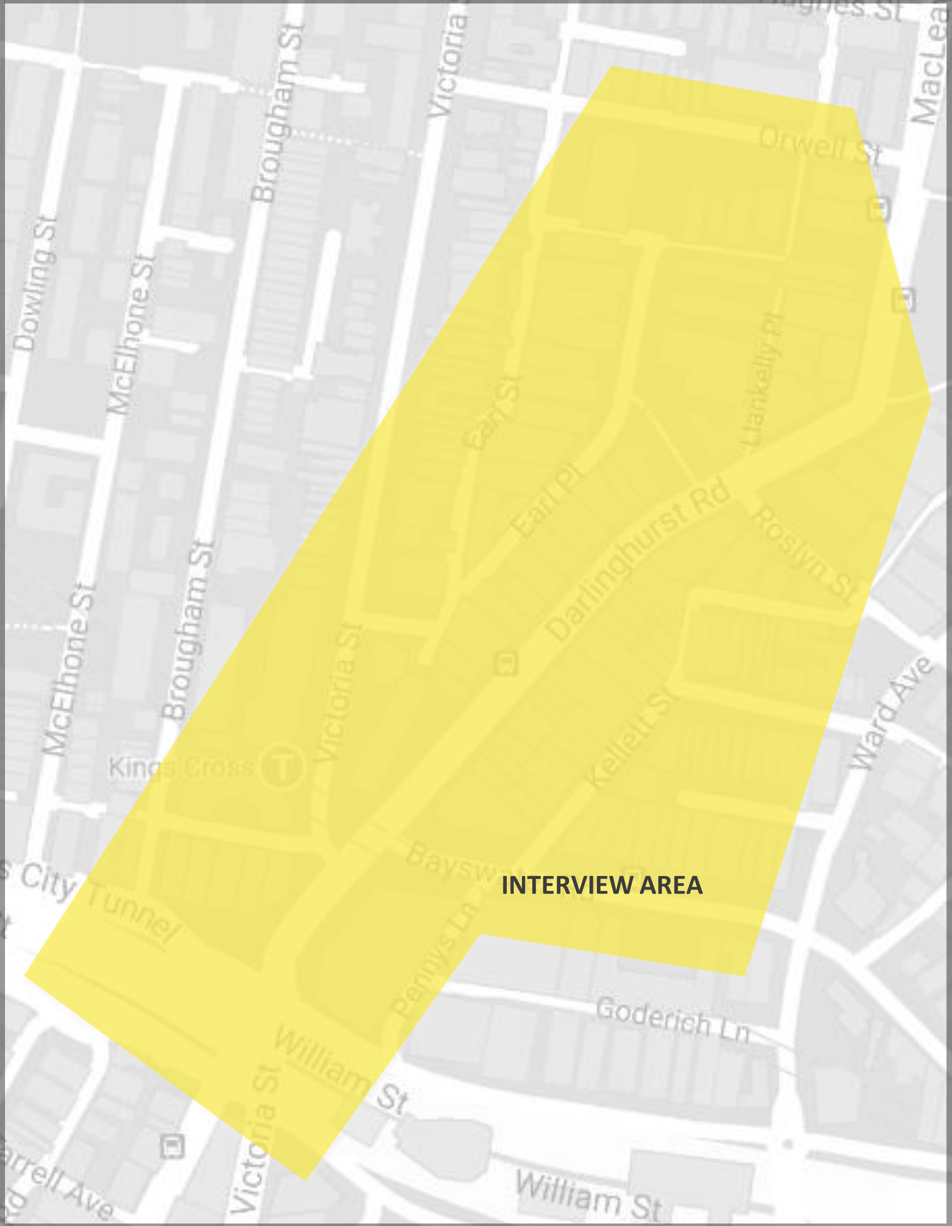
SOUTHERN CBD

POTTS POINT AREA

OXFORD STREET AND SURROUNDS

NEWTOWN AND SURROUNDS

PYRMONT AND SURROUNDS



Potts Point area (For example, the Kings Cross area and surrounds)

Potts Point is a weekday hub for inner city residents

Potts Point

The Potts Point area was mainly visited by locals… with 2 in 3 people in Potts Point indicating they live in an inner city area, 17p.p. higher than the index across all precincts. This result appears to be driven, in part, by weekday visitors, with 7 in 10 people indicating they live in the inner city. Interestingly, Potts Point had notably fewer greater Sydney residents in the area (14p.p. lower than the index across all precincts), while the proportion of domestic and international visitors was in line with the average amongst all precincts – albeit, these groups still only accounted for a small proportion of people in the area (around 1 in 8)

Young people more likely to visit in the evening… during the day, younger audiences (i.e. under the age of 30) accounted for around 2 in 5 people in the area. However, after 6pm this group increased significantly to half of the precinct. In contrast, people aged 50+ decreased from around a quarter of people in the precinct during the day to just over 1 in 10 in the evening

Frequency of visitation a key element for Potts Point… repeat visitation was a key feature of the Potts Point visitor profile, with almost 3 in 5 visiting the area more than once a week (5p.p. higher than the index across all precincts). This outcome is likely the result of having a large proportion of inner city residents in the area (e.g. the majority of visitors may live in or around Potts Point and as such visit the area frequently)

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	60	-1	57	63	64	55
Female	40	+1	43	37	36	45
Under 30	45	-8	39	50	35	55
30-49	36	+2	34	38	40	33
50+	19	+6	27	12	26	12
Inner city	65	+17	67	63	70	60
Greater Sydney	22	-14	18	26	19	26
Domestic visitors	4	-4	5	3	2	6
International visitors	9	+1	10	7	9	9
<$50K	36	-1	32	40	33	40
$50K to $100K	25	0	30	21	24	27
$100K+	21	0	23	19	23	19
Refused	18	+1	16	20	21	15
Work in the immediate area	29	-6	30	28	30	28

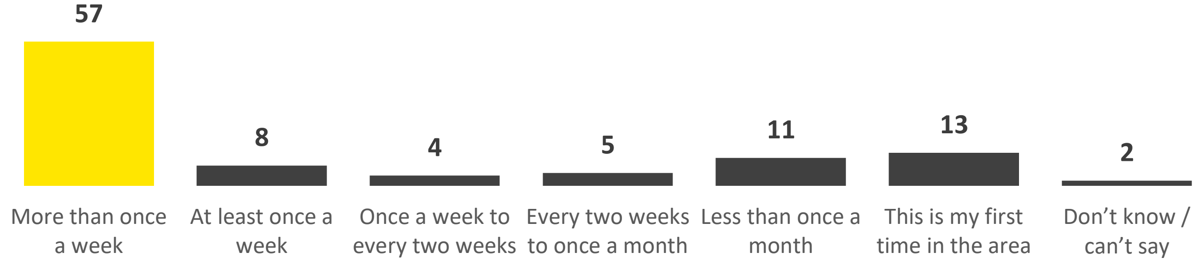
Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258). Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Visitation frequency notably lower amongst night time and weekend visitors

Visitation frequency (%)

Overall



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Overall	57	8	4	5	11	13	2
Index (Diff)	+5	-3	0	-3	-2	+3	0
Day time	62	8	3	5	11	10	1
Night time	52	7	6	6	11	15	3
Wednesday	70	4	3	4	9	9	1
Saturday	42	12	6	7	14	17	2
Inner city	71	8	3	5	6	5	1
Greater Sydney	38	8	9	6	25	13	0
Domestic and International visitors	16	4	1	4	13	52	7

Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, Greater Sydney=120, Domestic and International visitors=67)
Q2

Potts Point and surrounds area is primarily visited by locals, with

2 in 3
visitors from the inner city
(+17 p.p. above index)

The abundance of inner city locals are also likely driving higher visitation frequency to the area

3 in 5
visit more often than once a week
(+5 p.p. above index)

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social and leisure a key feature of the area

Reasons for visiting were notably different during the week compared to weekends… with half of those in the precinct on the weekend indicating it was for social or leisure reasons (compared to 3 in 10 weekday visitors). Alternatively, weekday visitors were significantly more likely to be just passing through the area (19% compared to only 7% of weekend visitors)

Greater Sydney residents more likely to be visiting the area for business… with 3 in 10 indicating this was the main reason for their visit. Alternatively, domestic and international visitors were more likely to be sightseeing in the precinct

3 in 5 inner city residents were in the area on their own… 11p.p. higher than the index across other precincts. Domestic and international visitors were more likely to be accompanied by their spouse or partner

Company in the precinct related to reasons for visiting the area… with half of those in the area for social and leisure reasons indicating they were with friends, while those sightseeing were more likely to be with their spouse/partner (30%) or with friends (36%)

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Social / leisure	40	-4	35	45	30	51	38	39	51
Business	17	-3	20	13	20	13	14	28	12
Passing through	13	-1	11	16	19	7	15	9	10
Shopping	9	-1	12	5	6	11	10	5	7
Sightseeing	6	-4	9	4	4	9	3	4	25
Catch public transport	4	-4	7	2	6	2	6	3	1
Appointment	4	+1	6	1	4	3	4	3	3

Company in the precinct (%)

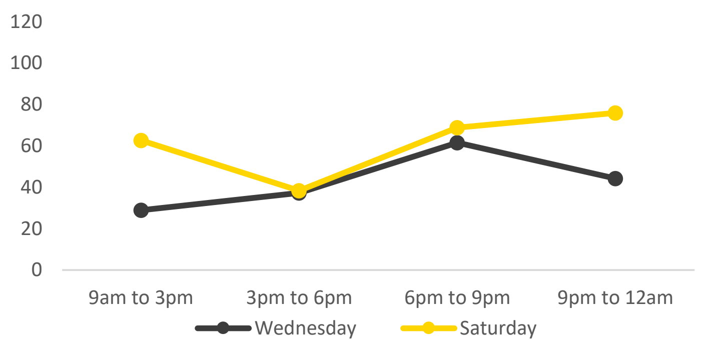
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
On my own	57	+11	66	49	69	45	63	49	40
With friends	26	-5	16	36	17	36	25	28	30
Spouse / partner	11	-3	12	11	9	14	9	10	25
With work colleagues	4	-2	4	4	4	3	2	9	4
Other family	2	-3	1	3	2	2	1	3	3
With children (<14yrs)	1	0	2	1	1	2	2	0	3
With clients	1	+1	1	1	1	1	1	3	0
With tour	0	0	0	0	0	0	0	1	0

Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67)
Q1, Q6

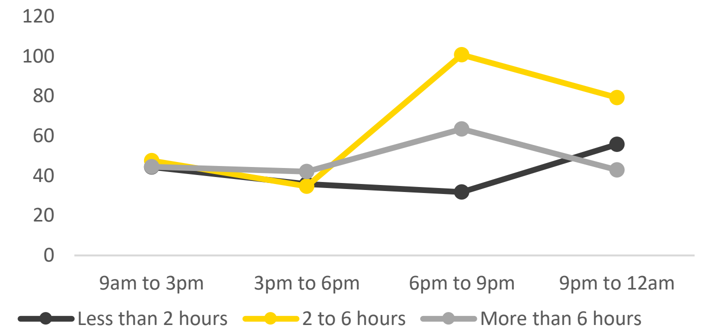
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Average indicative spend levels peaked during the evening

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Time spent in the area ($)



Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Potts Point indicative spend affected by the types of activities undertaken in the area… as with other precincts in the inner city, the types of activities, as well as the number undertaken, impacted on indicative spend. For example, those who visited a bar or pub had an indicative spend of $81, while those who attended an event, business meeting or conference had an indicative spend of $31. Also similar to other precincts, those who undertook multiple activities in the area had substantially higher indicative spend ($62 compared $49 of those who only undertook one activity)

Encouraging people to stay for 2-6 hours could optimise spend outcomes… visitors who stayed in the Potts Point precinct for 2-6 hours had significantly higher indicative spend ($67). Those who stayed in the area for less than 2 hours had an indicative spend of only $41, highlighting the importance of encouraging visitors to extend their stay whilst in the area. Interestingly, visitors who spent 6 or more hours in the area also had lower indicative spend ($49). This is potentially a result of these people living or working in the area (i.e. 7 in 10 indicated they lived in the inner city)

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The majority of visitors bought food from a restaurant or café while in the area

Potts Point

Coffee and tea more common during the day… as with other precincts, having coffee/tea was a popular activity during the day – with half of the precinct's daytime visitors engaging in this activity. This behaviour decreased significantly in the evenings, with only 1 in 3 buying a coffee after 6pm. In contrast, visiting licensed venues was a more common activity in the evening (with just over 2 in 5 people doing so after 6pm) and on the weekends (39%). This figure was significantly lower before 6pm and on weekdays (21% and 28% respectively)

Accommodation rates were relatively high in this precinct… particularly amongst domestic and international visitors, with 1 in 3 indicating they stayed in the area overnight

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Food	53	0	53	53	52	54	53	50	61
Coffee/tea	43	+1	51	34	41	45	43	38	49
Bar/pub	33	0	21	44	28	39	31	31	46
Shopping	21	0	27	15	25	16	24	12	21
Overnight stay	12	+4	11	13	15	9	10	6	34
Event, business meeting or conference	11	-1	15	8	12	10	11	13	10
Show friends/relatives around	10	-2	11	10	12	9	10	10	13
Cultural attractions	8	-3	10	6	10	5	8	6	12

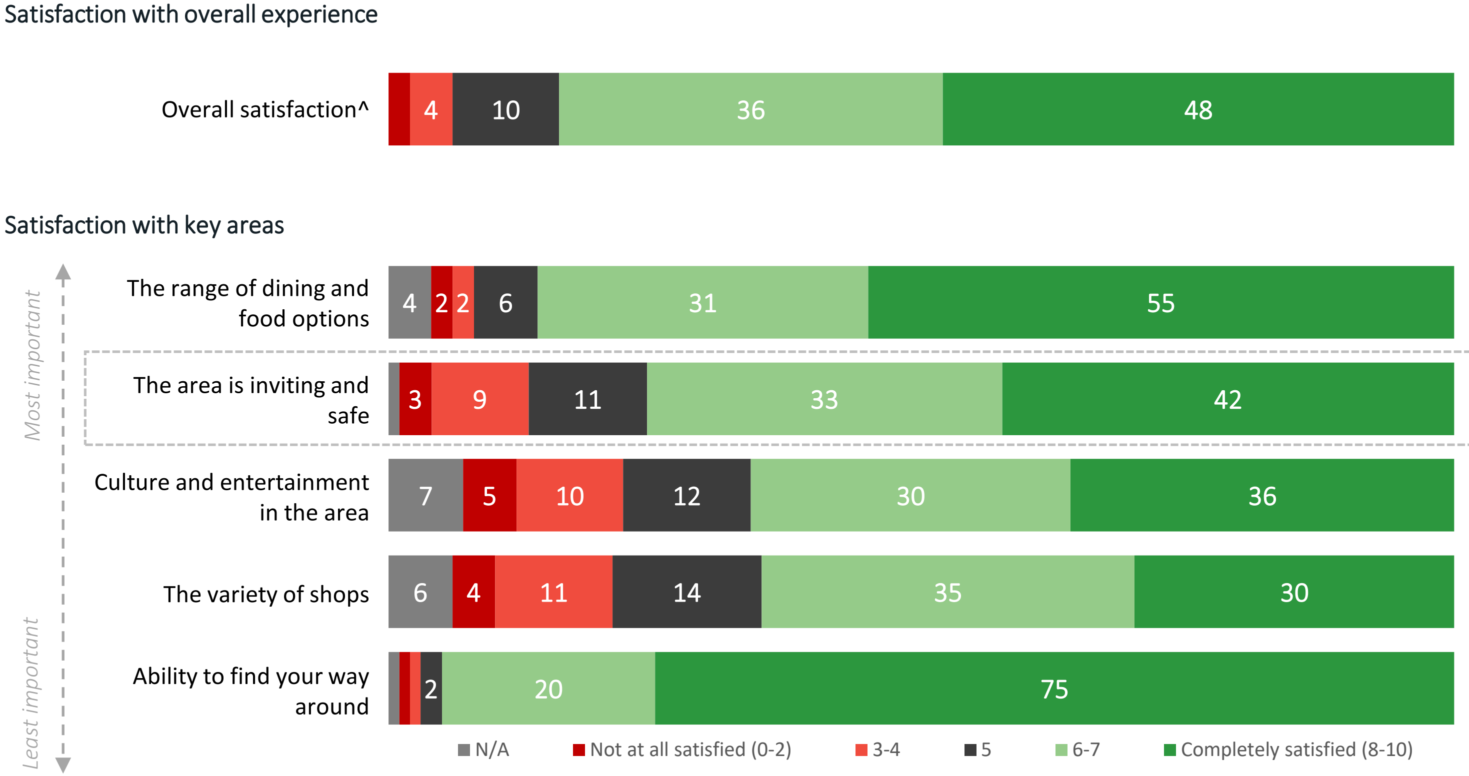
Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Whilst the F&B offer in the area is a driver of satisfaction, safety, entertainment and the variety of shops are all seen to be areas for improvement

Potts Point

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Overall satisfaction^	-10	50	46	50	45	51	39	45
The range of dining and food options	-1	57	52	57	52	56	52	51
The area is inviting and safe	-21	44	40	41	42	43	33	49
Culture and entertainment in the area	-8	34	38	31	41	34	43	37
The variety of shops	-11	35	25	28	32	32	25	25
Ability to find your way around	+2	76	73	77	72	79	72	58

Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Improving public perceptions of safety potentially a key focus area for Potts Point according to visitors

Potts Point

Safety, a salient point for many… perceived safety was 21p.p. below the index across all precincts. Given that safety is typically a hygiene factor for many destinations (i.e. people don't go to an area they think is unsafe), respondents felt this could be a key focus area for the future. With that in mind, it is important to note this finding refers to perceived safety. This means that, as well as addressing any potential public safety issues in Potts Point, it is just as important to communicate and demonstrate the inviting and safe nature of Potts Point to Sydney residents and visitors

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Wider range and availability of shops	32	+2	36	28	32	31	36	28	21
Improved security/safety	27	+16	32	23	24	31	28	30	18
Improved cleanliness	25	+11	29	21	19	31	27	24	15
Improved entertainment & cultural offerings	21	0	24	18	20	22	24	19	9
More food options	17	-3	16	18	17	17	19	15	10
More parks/green areas	16	+3	19	13	19	14	18	15	10
More bars/beverage options	16	+3	12	21	16	17	16	18	18
More parking available	16	+3	18	14	19	13	16	20	9
Better value for money/cheaper	15	-2	19	10	14	16	17	10	12
Improved transportation to/from	9	-2	10	8	9	9	9	9	7
Construction completion	9	-5	12	5	10	7	11	6	3
Better signage/wayfinding	6	-1	7	5	8	4	6	9	3

Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Potts Point

Walking is the main method of transportation in the area

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Walk	54	+7	60	48	60	47	61	28	63
Train	39	+6	36	42	38	40	33	59	34
Bus	11	-9	12	11	12	11	11	15	6
Drive	9	-2	8	11	9	10	7	19	7
Taxi/Uber	7	+1	5	8	6	8	6	6	10

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Walk	54	+9	56	51	62	45	61	27	63
Train	30	-1	32	29	27	33	23	49	34
Bus	16	-6	18	14	18	14	14	22	13
Drive	8	-3	6	10	7	9	6	20	1
Taxi/Uber	7	0	4	11	4	11	7	9	7

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Knowledge of the area	73	+1	77	69	78	68	83	69	28
Phone apps / maps	35	-3	28	42	33	38	26	43	73
Signage in the area	5	0	3	6	7	3	4	3	12
Asked friends/family for directions	3	0	3	4	4	3	3	4	4
Asked staff / officials for guidance	3	+1	3	2	3	2	1	2	15
Printed map / guide book	2	0	2	1	1	3	0	3	10
Tour guide	1	0	0	2	1	1	0	3	3

Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social media, word of mouth and search engines are the main methods visitors use to find out about things to do in Potts Point

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Social media	50	+1	44	57	44	57	50	59	36
Recommended by friends, family or work colleagues	47	-2	49	45	45	48	49	41	43
Search engines	37	+4	41	33	31	44	37	33	46
Other websites	18	+5	17	18	20	15	18	13	25
Travel websites	12	+2	11	12	11	13	10	10	25
Newspapers	9	0	10	9	12	6	11	8	1
Event websites	9	-2	10	7	7	10	10	8	4
City of Sydney website	8	0	9	8	10	7	10	6	3
TV programmes	7	+2	9	6	9	6	9	5	6
Radio	4	+1	6	3	6	3	3	9	1
Tourist flyers	4	+1	3	5	3	6	3	4	12
Membership emails (e.g. Opera House)	4	0	6	1	5	2	5	1	1
Travel agents or tour guides	0	0	0	1	0	1	0	1	1

Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67)
D1

EY Sweeney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

NORTHERN CBD

CENTRAL CBD

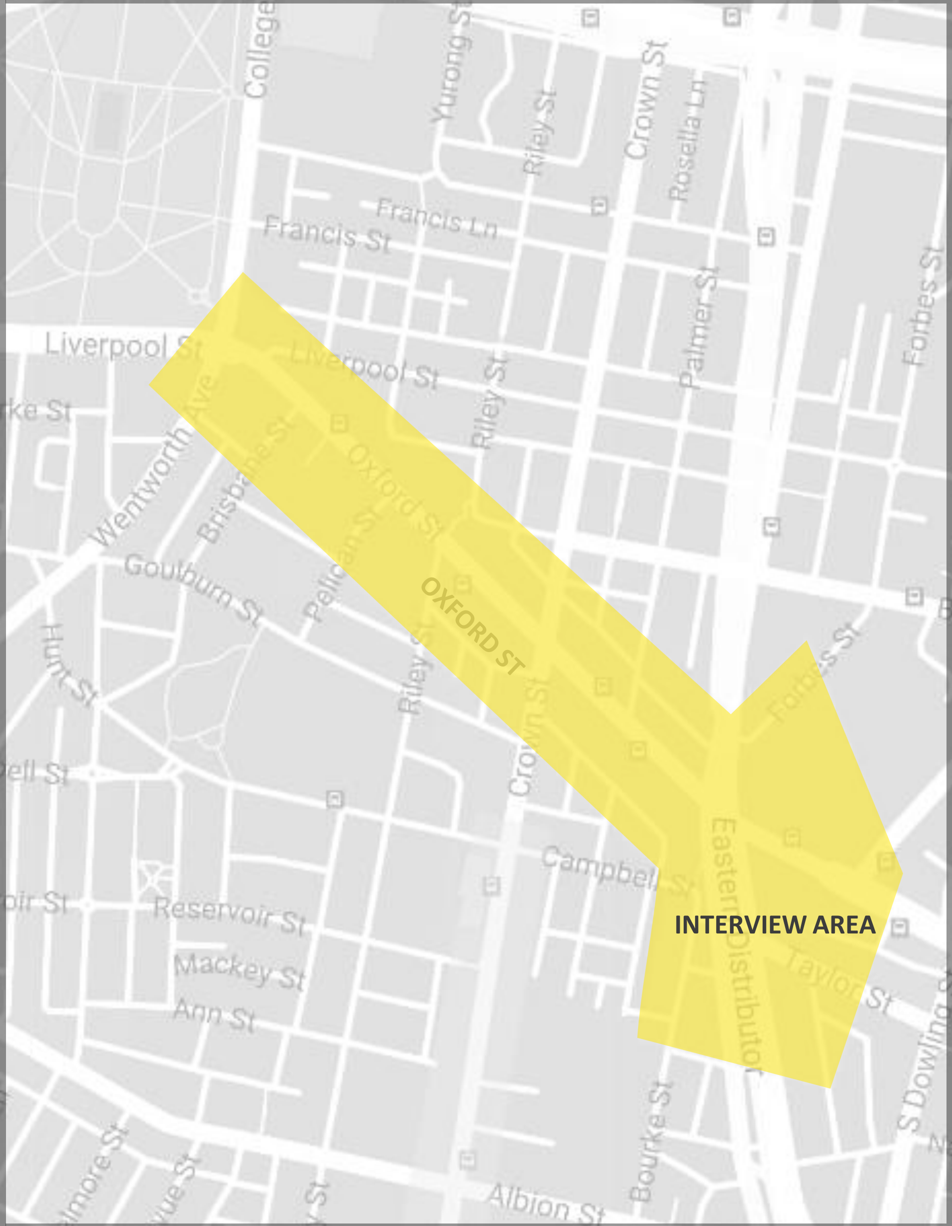
SOUTHERN CBD

POTTS POINT AREA

OXFORD STREET AND SURROUNDS

NEWTOWN AND SURROUNDS

PYRMONT AND SURROUNDS



Oxford Street and surrounds area

Oxford Street primarily frequented by inner city residents

Oxford Street visited heavily by inner city residents… with more than half of the visitors in the area indicating they live in an inner city area (6p.p. higher than the index across all precincts). This figure softened to around half in the evenings, and on the weekend – potentially a result of more residents from the greater Sydney region visiting the area for cultural and entertainment activities during these times. As with other precincts, visitors were more heavily composed of males (5p.p. higher than the index) – this dynamic was present across both days of the week as well as different times of the day

Older visitors were less likely to be in the area at night… 1 in 5 visitors who visited during the day were aged 50+. However, at night this proportion reduced to less than 1 in 10. In contrast, younger visitors (i.e. people under the age of 30) accounted for just under half of the precinct's visitors prior to 6pm. This proportion increased to around 3 in 5 people in the evenings

The majority visited the precinct quite frequently… with around 2 in 3 visitors visiting the precinct at least once a week, half come to the area more often than that. Interestingly, 3 in 5 inner city residents indicated they visit Oxford St more than once a week

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	66	+5	67	64	67	64
Female	34	-5	33	36	33	36
Under 30	53	0	49	57	51	56
30-49	32	-1	31	34	33	32
50+	14	+1	20	9	16	13
Inner city	54	+6	57	50	58	49
Greater Sydney	32	-4	29	35	30	34
Domestic visitors	9	+1	10	7	8	10
International visitors	5	-2	3	7	4	7
<$50K	43	+5	46	40	40	46
$50K to $100K	24	-1	22	26	26	22
$100K+	15	-5	15	15	15	15
Refused	18	+1	17	19	19	17
Work in the immediate area	31	-4	32	29	37	24

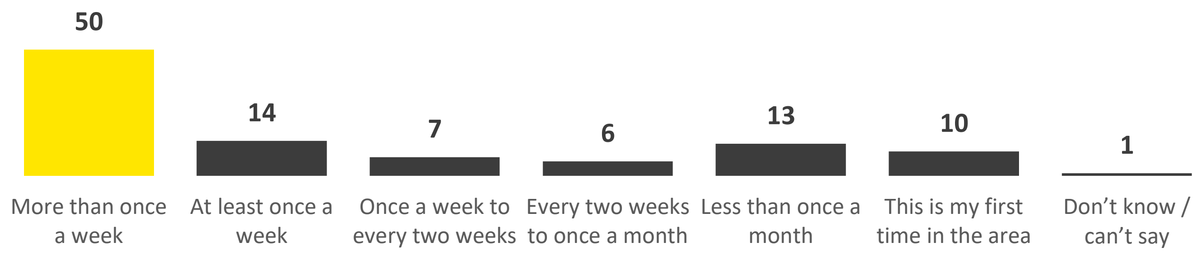
Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256). Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Weekend visitors tend to visit the area less frequently than those who were in the area during the week

Visitation frequency (%)

Overall



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	-2	+3	+3	-2	-1	0	0
Day time	51	15	8	5	12	7	2
Night time	49	13	7	7	13	12	0
Wednesday	55	14	4	5	10	11	0
Saturday	44	13	11	6	16	8	2
Inner city	58	15	9	5	7	5	0
Greater Sydney	47	16	7	7	14	8	1
Domestic and International visitors	25	4	1	4	31	32	3

Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, Greater Sydney=170, Domestic and International visitors=75)
Q2

The Oxford Street and surrounds attracts a distinct profile of visitors, who are more likely to be male, local inner city residents and visit the area multiple times a week.

2 in 3
visitors are male
(+5 p.p. above index)

54%
visitors from the inner city
(+6 p.p. above index)

2 in 3
visited at least once a week

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The majority of greater Sydney residents visited the precinct for social and leisure reasons

Oxford Street

Social and leisure activities were the most common reason for visitation to the area… with 2 in 5 people saying they were in the area for social or leisure activities. This was particularly prevalent amongst residents from the greater Sydney area, with 1 in 2 in the area for this reason

Oxford Street can be a thoroughfare to other destinations… with 1 in 4 indicating this as their main reason for visiting the area, i.e. just passing through the area on their way to another location or catching public transport. There may be an opportunity to consider strategies aimed at disrupting people as they transition through the precinct in order to capture their attention and either encourage them to spend time in the precinct there and then or visit another time

More than half of visitors were in the precinct on their own… 8p.p. higher than the index across all precincts. This was particularly common during the day and during the week. At night and on weekdays Oxford Street becomes an increasingly social destination, with 1 in 3 attending the precinct with their friends

Three quarters of those in the area for business were on their own… while those undertaking leisure or social activities were significantly more likely to be in the area with friends (51%)

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Social / leisure	42	-2	28	56	36	48	38	50	41
Passing through	20	+6	20	21	23	18	20	20	23
Business	14	-6	19	9	14	14	12	16	16
Catch public transport	12	+3	12	12	13	11	11	14	9
Shopping	6	-3	10	2	4	9	8	4	4
Sightseeing	5	-5	7	4	4	6	4	4	15
Appointment	3	0	5	1	4	2	4	2	1

Company in the precinct (%)

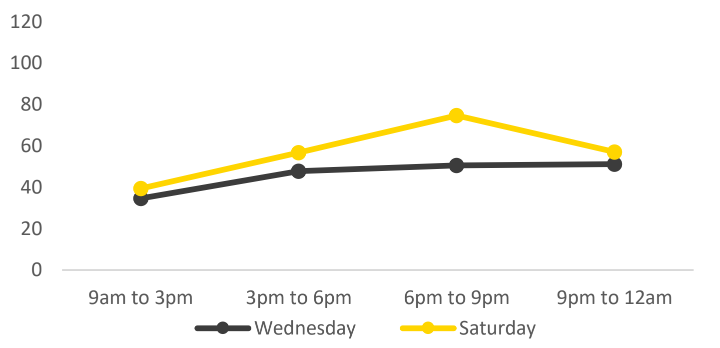
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
On my own	54	+8	61	46	60	46	58	52	40
With friends	30	-1	23	36	24	36	26	32	39
Spouse / partner	13	-1	9	17	12	14	13	13	13
Other family	3	-2	3	2	3	3	1	3	8
With work colleagues	2	-4	2	2	3	1	2	1	4
With children (<14yrs)	1	-1	1	1	1	0	1	1	1
With clients	1	0	0	1	1	0	1	0	1
With tour	0	0	0	0	0	1	0	1	1

Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, *Greater Sydney=170, **Domestic and International visitors=75)
Q1, Q6

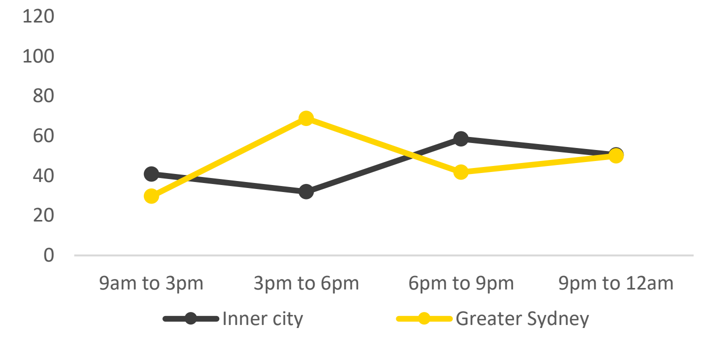
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Oxford Street had marginally lower indicative spend when compared to the index across all precincts

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Visitor types ($)



Indicative spend lower in the daytime… overall indicative spending in Oxford Street and its surrounds was $9 less than the index across all areas. This outcome was driven by lower daytime and weekday spend in the precinct

Higher spend levels amongst older visitors… with visitors aged 50+ indicating they spent $63 on average whilst in the area. This compared to an average of $49 amongst younger visitors

Activities drive positive spend outcomes… as with other precincts, those who undertook certain activities, such as: visiting a bar or pub ($80), browsing or buying from shops ($78) or showing friends around the area had significantly higher indicative spend than other visitors. Similarly, those who did multiple activities ($71) spent significantly more than people who only undertook a single activity ($48)

Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, *Greater Sydney=170, **Domestic and International visitors=75). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Whilst food and dining was the main activity undertaken in the area, it was less common when compared to other precincts

Oxford Street

Visitors were less likely to eat at restaurants or cafes while in the area… with only 2 in 5 indicating they did this whilst in Oxford St or its surrounds – 11p.p. lower than the index across all precincts

Strong nightlife offering… with around half of night time visitors, and 1 in 2 visitors on a Saturday indicating they went to a bar or pub while in the area

Older visitors were more likely to shop and have coffee… visitors aged 30+ were significantly more likely than younger visitors to buy or drink coffee (43% compared to 30%) or browse/buy from shops in the area (19% compared to 10%)

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Food	42	-11	39	45	41	43	42	39	48
Coffee/tea	36	-6	43	29	41	31	38	32	37
Bar/pub	35	+2	21	48	29	41	33	36	40
Shopping	15	-6	20	9	12	17	15	10	23
Show friends/relatives around	10	-2	9	12	9	12	10	10	13
Event, business meeting or conference	8	-4	9	7	9	7	8	9	7
Cultural attractions	7	-4	7	7	6	8	7	6	8
Overnight stay	5	-3	6	4	4	6	5	1	16

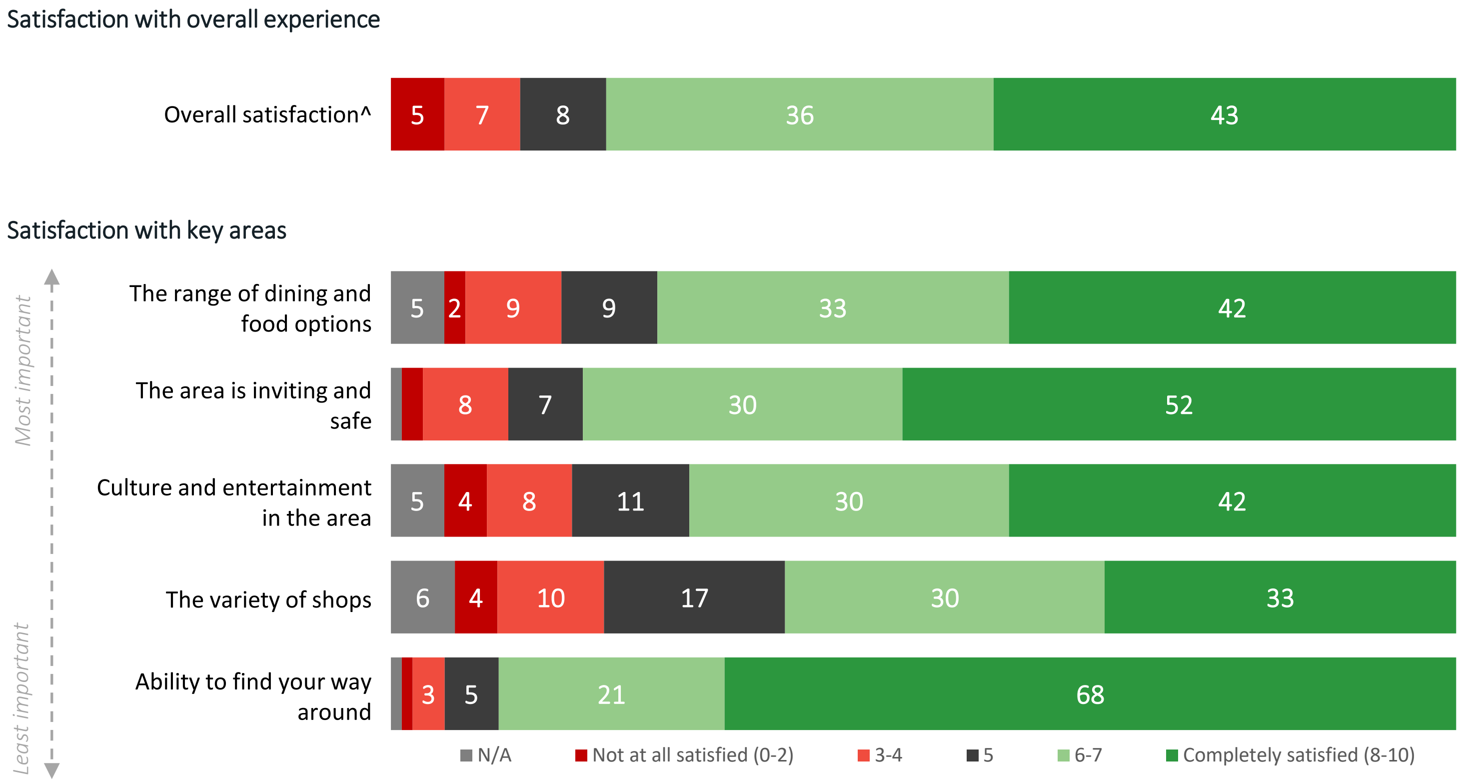
Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, *Greater Sydney=170, **Domestic and International visitors=75)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Overall satisfaction is lower than most other precincts, areas for improvement include F&B, safety and variety of shops

Oxford Street

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Overall satisfaction^	-14	42	44	42	44	42	45	45
The range of dining and food options	-13	40	44	45	39	48	37	33
The area is inviting and safe	-11	52	51	55	48	54	46	55
Culture and entertainment in the area	-3	36	48	40	44	42	43	39
The variety of shops	-8	33	33	34	32	34	28	41
Ability to find your way around	-4	66	71	74	62	78	62	48

Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, *Greater Sydney=170, **Domestic and International visitors=75)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Developing the range and availability of shops was the main opportunity identified by residents and visitors, entertainment, food and cleanliness was also mentioned

Oxford Street

Shopping a key consideration for people in the area… with around 1 in 3 indicating a wider range and availability of shops would have improved their experience in the precinct

Opportunity to develop other areas… while the range and availability of shops was a key consideration for many, satisfaction outcomes suggest other sections of the Oxford St offering could also be developed – with overall satisfaction 14p.p. below the index across all other precincts. This was driven by lower satisfaction ratings in terms of the range of food and dining options (13p.p. lower than the index) and the inviting and safe atmosphere of the area (11p.p. lower than the index). Addressing these aspects could help improve overall satisfaction

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Wider range and availability of shops	32	+2	31	33	35	30	36	32	17
Improved entertainment & cultural offerings	24	+4	19	30	23	26	25	29	12
More food options	20	0	20	21	23	18	24	18	13
Improved cleanliness	18	+4	16	21	21	15	18	21	13
More bars/beverage options	16	+3	12	19	15	16	18	14	9
More parks/green areas	16	+2	18	13	17	14	17	14	15
Better value for money/cheaper	15	-2	11	19	13	17	16	14	13
Improved security/safety	13	+2	11	16	15	12	16	12	8
More parking available	11	-2	9	13	11	11	9	16	5
Improved transportation to/from	8	-3	7	10	6	11	8	11	4
Better signage/wayfinding	6	-1	4	7	7	5	4	6	12
Construction completion	2	-11	3	1	3	2	2	2	5

Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, *Greater Sydney=170, **Domestic and International visitors=75)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

While walking was the most common method to get to and from the precinct, 1 in 3 used a bus

Oxford Street

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Walk	45	-2	53	37	42	49	54	29	48
Bus	32	+11	33	31	36	27	31	35	27
Train	20	-13	20	19	21	19	9	34	28
Drive	8	-3	8	8	7	9	5	12	9
Taxi/Uber	8	+2	4	12	8	7	6	9	12

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Walk	42	-3	51	32	38	45	51	25	43
Bus	35	+12	35	34	40	29	32	41	28
Train	19	-12	22	16	19	19	9	35	23
Taxi/Uber	10	+3	3	16	8	11	8	11	13
Drive	7	-4	6	8	7	7	3	11	13

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Knowledge of the area	73	+1	72	75	78	68	81	73	43
Phone maps / apps	39	0	37	40	33	44	32	42	56
Signage in the area	4	-2	2	5	3	5	3	3	8
Asked friends/family for directions	4	0	3	4	2	5	2	2	12
Printed map / guide book	3	0	3	3	4	2	1	1	13
Asked staff / officials for guidance	1	-1	1	1	1	1	0	0	5
Tour guide	1	0	0	1	1	0	0	0	4

Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, *Greater Sydney=170, **Domestic and International visitors=75)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Visitors to Oxford Street rely on recommendations and social media to find out about things to do in the area

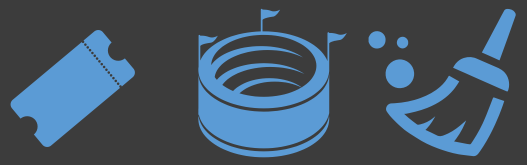
Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Recommended by friends, family or work colleagues	50	+1	47	53	56	44	51	51	43
Social media	47	-2	43	51	43	51	48	53	31
Search engines	30	-3	31	28	31	29	32	28	27
Newspapers	10	+1	13	7	10	11	14	8	3
Other websites	10	-3	8	12	8	12	11	9	9
Event websites	9	-2	8	9	7	11	9	7	11
Travel websites	8	-2	7	9	8	8	7	6	13
City of Sydney website	7	-1	7	7	5	9	7	7	5
TV programmes	6	0	5	6	7	5	6	5	5
Tourist flyers	3	-1	2	4	5	2	3	2	8
Membership emails (e.g. Opera House)	3	0	3	3	2	4	4	3	1
Radio	3	-1	4	2	3	2	3	3	1
Travel agents or tour guides	0	0	0	0	0	0	0	0	1

Base: respondents interviewed in the Oxford Street area, n=529 (Index=3,741, Day=261, Night=268, Wednesday=273, Saturday=256, Inner city=284, *Greater Sydney=170, **Domestic and International visitors=75)
D1

Oxford St visitors were less likely to undertake multiple activities in the area compared to other precincts

Including food (-11 p.p. below index), coffee (-6 p.p.) and shopping (-6 p.p.)



Along with entertainment and cleanliness, these aspects were also commonly suggested as areas that could be improved to enhance the experience of the area

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

NORTHERN CBD

CENTRAL CBD

SOUTHERN CBD

POTTS POINT AREA

OXFORD STREET AND SURROUNDS

NEWTOWN AND SURROUNDS

PYRMONT AND SURROUNDS

Newtown and surrounds area

Strong dining and leisure offerings attract a youthful visitor profile to Newtown

Newtown

Visitation skewed towards people living in the Inner City area… with 6 in 10 people in the Newtown area living in an inner city area, 14p.p higher than the index. This skew was significantly higher during the day (68% compared to 55% in the evenings), while visitors from Greater Sydney were more likely to visit with friends after 6 pm. This skew was also more notable during the week, with 7 in 10 visitors on a Wednesday indicating they lived in an inner city area (compared to half on a Saturday)

Strong female presence in the area… unlike most other precincts, there was almost the same proportion of males and females in Newtown (i.e. the proportion of visitors who were women was 9p.p. higher than the index across all precincts). This relatively even gender split was present across all times of the day and on both days of the week

Newtown visitors are a youthful group… with 3 in 5 visitors under 30 years of age, 7p.p higher than the index. The younger age distribution of the precinct resulted in a corresponding increase in the proportion who had a household income of less than $50,000 per year (7p.p. higher than the index across all precincts)

Visitors less likely to work in the area… despite having a large proportion of inner city residents in the area, only 1 in 4 people in the precinct actually worked in the area (12p.p. lower than the index across all precincts)

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	52	-9	53	50	48	56
Female	48	+9	47	50	52	44
Under 30	60	+7	56	65	59	62
30-49	29	-5	32	26	29	29
50+	11	-3	12	9	12	10
Inner city	62	+14	68	55	71	52
Greater Sydney	29	-8	24	34	20	38
Domestic visitors	7	-1	5	8	5	8
International visitors	3	-5	2	4	4	2
<$50K	44	+7	44	44	46	43
$50K to $100K	26	+1	26	26	25	27
$100K+	13	-7	15	12	11	16
Refused	16	-1	15	17	18	14
Work in the immediate area	23	-12	25	21	25	21

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268).
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

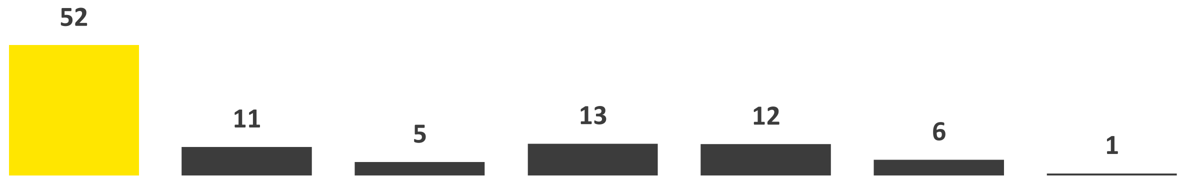
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Around half visit the area more than once a week, again largely driven by inner city locals

Newtown

Visitation frequency (%)

Overall



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	0	0	+1	+5	-1	-3	-1
Day time	56	10	5	11	11	5	1
Night time	47	13	6	14	13	7	0
Wednesday	57	14	6	8	9	6	1
Saturday	47	9	4	18	16	7	0
Inner city	65	11	4	9	8	2	1
Greater Sydney	33	14	9	20	18	6	0
Domestic / International visitors	20	4	4	16	25	31	0

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, Greater Sydney=153, Domestic and International visitors=51)
Q2

Newtown visitor profile features distinct difference from other precincts surveyed…

1 in 2
Female
(+9p.p. above index)

3 in 5
Under 30
(+7p.p. above index)

<30

3 in 5
From the inner city
(+14p.p. above index)

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social/leisure and sightseeing are the main reasons for visiting Newtown

Newtown

Social and leisure activities are a key offering in the Newtown area… with half indicating this was the main reason for visiting the area (9p.p. higher than the index across all precincts). This increased to almost 7 in 10 at night (compared to around 2 in 5 during the day) and was driven by visitors from greater Sydney

Residents from the greater Sydney area were substantially more likely to visit the area for social and leisure reasons on the weekend (69% compared to 60% during the week)

Company is dependent on reasons for visit… with most visitors in the area for social/leisure reasons, visitors were most commonly accompanied by their friends. Due to the focus on social and leisure offerings in Newtown, the proportion who visited with friends overall was 11p.p higher than the index. Unsurprisingly, this outcome was driven by night time and weekend visitors to the area

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
Social / leisure	53	+9	38	69	44	61	44	66	69
Passing through	17	+2	17	15	25	8	21	8	10
Shopping	14	+5	23	4	13	15	14	14	12
Catch public transport	11	+3	14	8	14	8	15	4	4
Business	10	-10	11	9	12	8	11	8	10
Sightseeing	5	-5	6	3	5	4	3	3	18
Appointment	3	0	5	1	3	3	2	5	0

Company in the precinct (%)

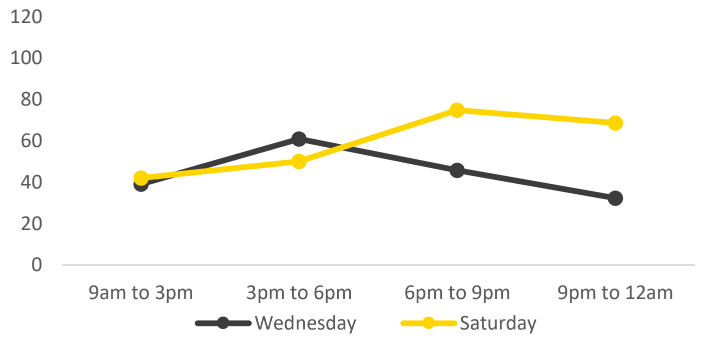
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
With friends	42	+11	35	50	35	49	38	54	35
On my own	40	-6	49	29	51	28	46	29	35
Spouse / partner	11	-3	9	13	0	12	9	13	18
Other family	5	+1	5	6	4	7	4	5	14
With work colleagues	4	-2	3	5	3	5	5	2	2
With children (<14yrs)	1	-1	1	1	0	1	1	0	4
With clients	0	0	0	0	0	0	0	1	0
With tour	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51)
Q1, Q6

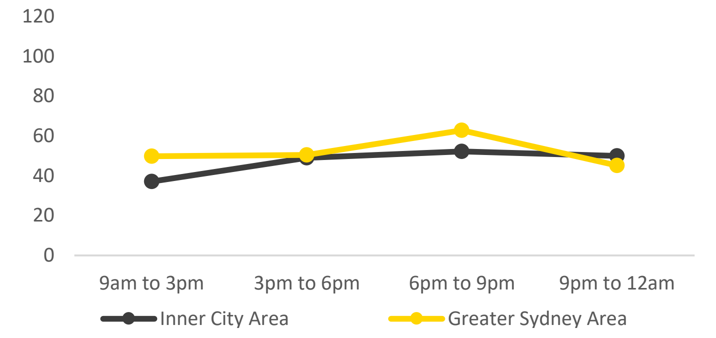
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Overall, spend is lower in the area compared to the indexed average

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Visitor types ($)



Average total spend in the area ($)

$51
Average total spend in the area
(Index $60)

$48 Day time	$55 Night time	$45 Wednesday	$58 Saturday

$46 Inner city	$53 Greater Sydney	$80 Dom/Int* visitors

Domestic/International visitors spending 30% more than other groups… with this group having an indicative spend of $80, substantially higher than Inner city and Greater Sydney visitors ($46 and $53 respectively). Encouraging longer visits could also have a positive effect on the area, with visitors in the area for 1 to 2 hours spending twice as much as those who were there for less than an hour. Daytime spend was relatively consistent regardless of day of the week (approximately $48), however night-time spend increased from $39 on weekdays to $72 on weekends.

Higher female skew may have a net positive effect on spend… with females indicating they spend marginally more than their male counterparts whilst in the area ($54 compared to $49)

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51).Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

EY Sweeney

Dining and cultural activities are key attractions for visitors to Newtown

Newtown

Food and beverage, a key feature of Newtown… with the consumption of food, drinks and alcohol constituting 79% of activities undertaken in the area. The shopping offering in Newtown also appears to be strong, with the proportion who bought from, or browsed shops in the area 6p.p. higher than the index (around 1 in 4). Interestingly, age seems to be a driver for shopping behaviour in Newtown, with almost half of those aged 50+ indicating they did some shopping whilst in the area – this figure dropped significantly to around 1 in 5 visitors amongst those under 30 years of age

Cultural attractions and shopping a draw for visitors… a quarter of people in the area also visited cultural attractions, 6p.p higher than the index. This figure increased to around 1 in 3 during the day (compared to 17% at night)

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
Food	59	+6	54	65	55	63	56	65	67
Coffee/tea	39	-3	49	27	38	40	39	38	41
Bar/pub	35	+2	26	46	29	42	36	37	24
Shopping	26	+6	35	17	24	29	25	31	24
Show friends/relatives around	16	+4	16	17	14	18	18	12	18
Cultural attractions	13	+2	11	16	12	14	13	14	16
Event, business meeting or conference	8	-4	7	8	9	6	9	6	10
Overnight stay	7	-2	7	6	9	5	8	3	12

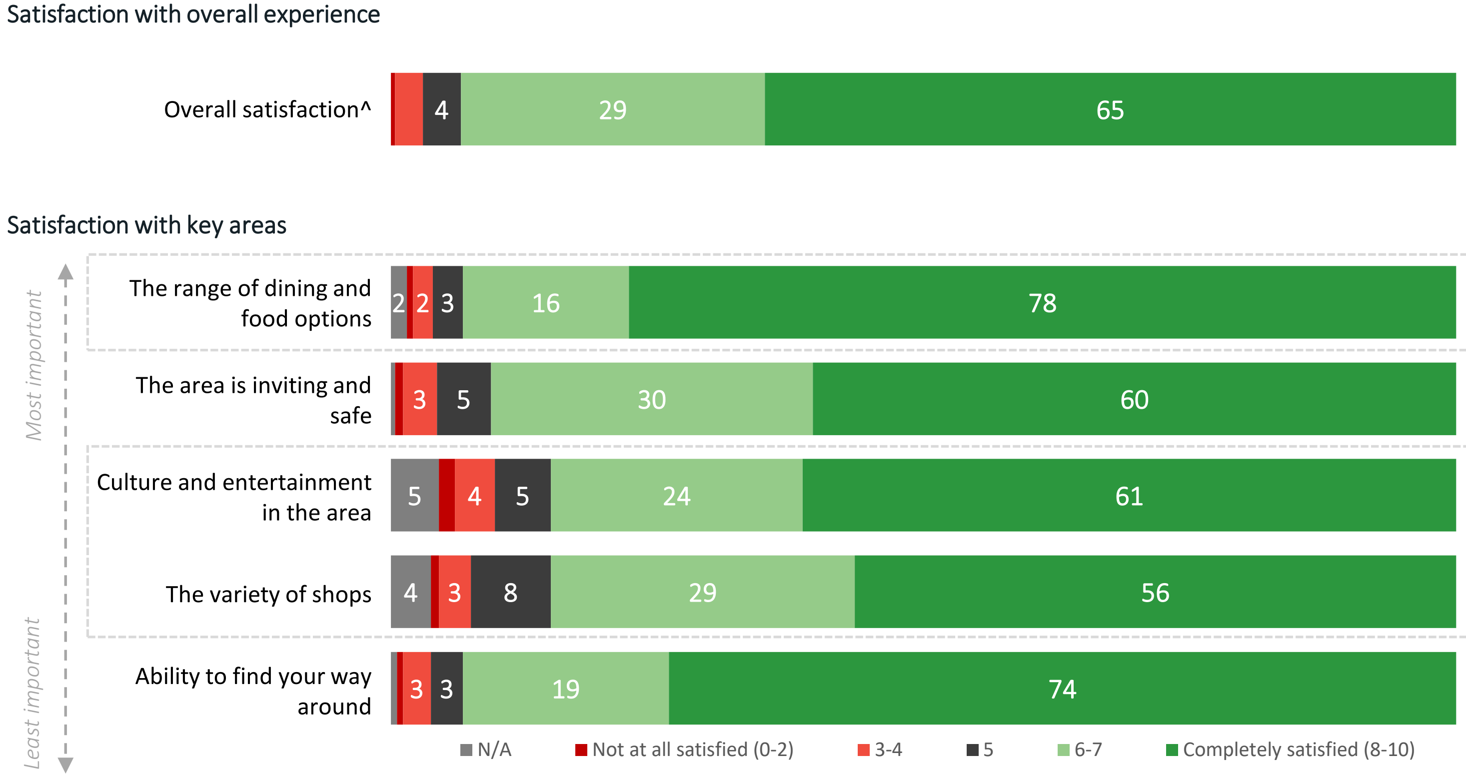
Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Positive overall satisfaction driven by F&B, shopping and cultural offerings of the area

Newtown

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
Overall satisfaction^	+7	67	62	66	64	67	62	63
The range of dining and food options	+22	77	78	79	76	77	80	76
The area is inviting and safe	-3	65	55	63	58	63	56	59
Culture and entertainment in the area	+17	56	67	62	61	61	63	61
The variety of shops	+16	62	50	59	54	56	58	59
Ability to find your way around	+2	76	71	79	69	79	65	65

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Despite positive scores, visitors would like to see a wider range and availability of shops in the area

Newtown

Wider range of shops a key consideration for visitors... a quarter of visitors felt that their visit could have been improved with a more diverse range and availability of shopping in the area. With that in mind, more than half were already completely satisfied with the variety of shops in the area – suggesting that any efforts in this area would be a matter of building on an already strong existing offering

Perceived safety at night potentially an area to consider... overall, only 1 in 10 visitors felt that safety should be a consideration. However, this figure was significantly higher in the evening, lifting to 18% of visitors, 5p.p. higher than the index across all precincts and times of day

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int **
Wider range and availability of shops	25	-5	23	26	30	19	28	18	25
Improved entertainment & cultural offerings	19	-5	19	20	22	17	22	17	10
Better value for money/cheaper	18	+1	16	20	22	13	18	18	20
More parks/green areas	17	+3	17	17	21	13	19	10	22
Improved transportation to/from	15	+4	14	17	16	15	14	19	12
More parking available	14	+1	10	17	14	13	13	16	8
More food options	13	-7	14	12	13	13	14	11	12
Improved security/safety	12	+1	7	18	14	10	11	15	10
More bars/beverage options	12	-1	10	13	15	8	13	8	10
Improved cleanliness	10	-4	11	8	15	4	12	4	12
Better signage/wayfinding	5	-2	5	4	8	1	5	4	8
Construction completion	5	-9	6	3	6	3	6	1	4

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The high proportion of inner city residents in the area meant that most were able to use their existing knowledge to navigate Newtown

Newtown

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
Walk	43	-4	48	37	44	41	52	30	24
Train	33	0	33	34	34	32	28	41	45
Bus	22	+2	22	22	24	20	20	27	18
Drive	15	+3	15	14	11	19	9	23	25
Taxi	4	-2	2	5	3	4	3	4	8

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
Walk	40	-4	44	35	43	37	48	27	25
Train	30	-1	34	27	30	31	26	35	43
Bus	23	0	25	20	23	23	20	29	18
Drive	14	+3	14	15	12	17	9	23	24
Taxi	5	-2	2	8	2	8	4	7	6

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
Knowledge of the area	71	-1	68	74	74	68	74	66	61
Phone maps / apps	42	+4	43	41	43	42	40	43	53
Asked friends/family for directions	5	+1	5	5	6	4	4	5	14
Signage in the area	4	-2	3	5	6	1	3	4	10
Asked staff / officials for guidance	2	0	1	2	3	0	1	1	6
Printed map / guide book	1	-1	1	0	1	0	1	0	2
Tour guide	0	-1	0	0	0	0	0	0	0

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

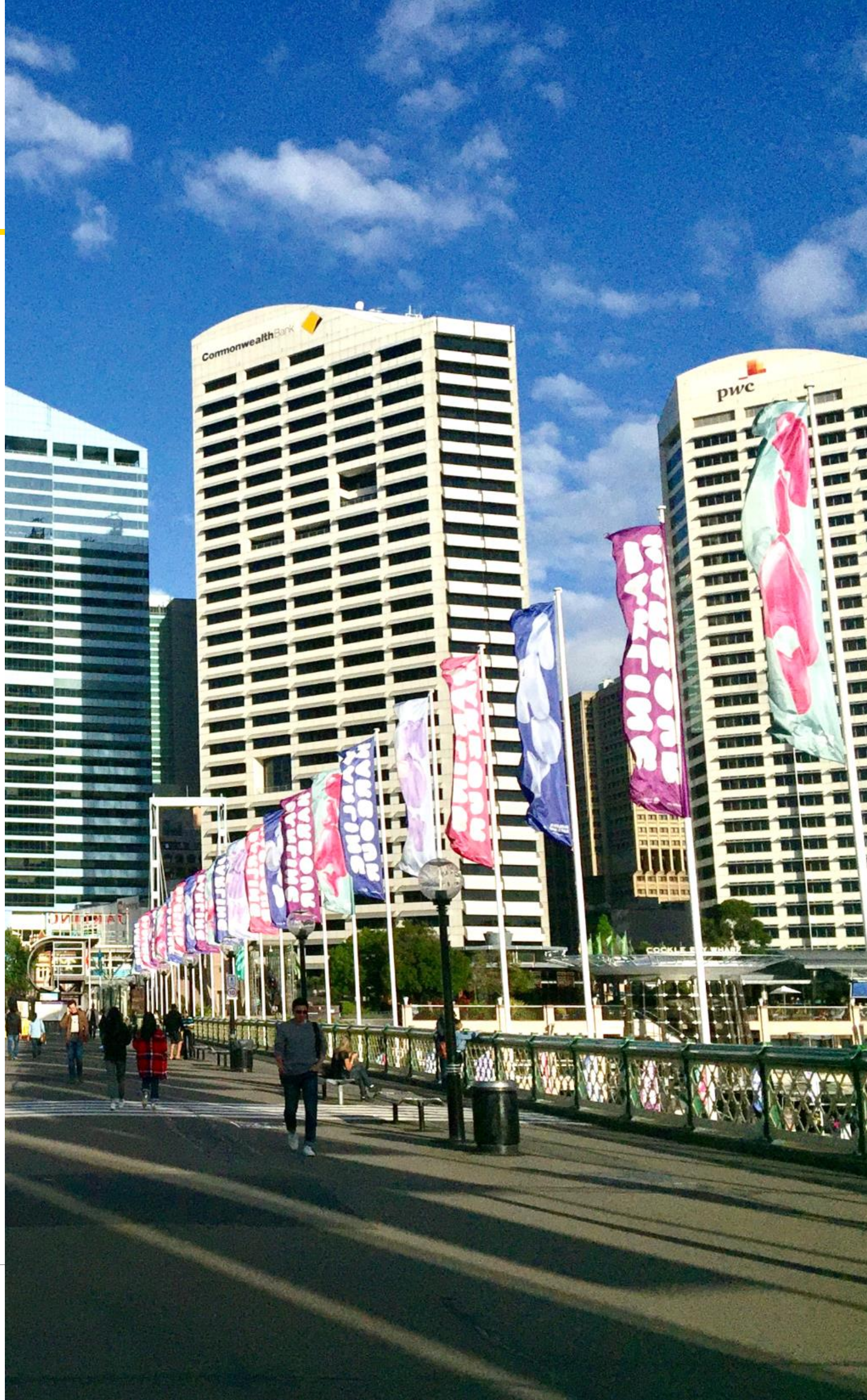
Word of mouth and social media were the primary methods used by visitors to discover activities in Newtown

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom/ Int**
Social media	63	+14	64	63	58	69	64	64	55
Recommended by friends, family or work colleagues	53	+4	52	53	57	48	55	46	57
Search engines	31	-3	31	31	29	32	30	31	35
Event websites	14	+3	17	10	14	13	15	14	6
Other websites	11	-2	12	10	12	11	12	8	12
Newspapers	9	0	12	5	12	6	9	9	6
City of Sydney website	8	0	9	7	11	6	10	5	6
Travel website	6	-4	6	6	8	4	6	1	20
Membership emails (e.g. Opera House)	5	+2	7	4	7	4	8	1	2
Radio	4	0	5	2	4	4	4	5	2
Tourist Flyers	4	0	4	3	3	4	4	3	4
TV programmes	3	-3	3	2	5	1	3	2	4
Travel agents or tour guides	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51)
D1

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value



NORTHERN CBD

CENTRAL CBD

SOUTHERN CBD

POTTS POINT AREA

OXFORD STREET AND SURROUNDS

NEWTOWN AND SURROUNDS

PYRMONT AND SURROUNDS

Pyrmont and surrounds area

Vibrant night life offering produces a significantly younger visitor profile in the evenings in Pyrmont

Pyrmont

Time of day was a key differentiator… throughout the day, Pyrmont is largely made up of middle aged workers, with more than half indicating they worked in the area and 3 in 5 over the age of 30. The profile of the precinct changes notably in the evening however, with the proportion on people under the age of 30 increasing to almost 3 in 5. Interestingly, the day of the week had less of an impact on the visitor profile – suggesting the night life offering of the area is relatively strong throughout the entire week

Return visitation was notably higher than other precincts… with 6 in 10 visitors indicating they visit the precinct more than once a week (9p.p. higher than the index across all precincts). This high level of frequency was driven by the inflated proportion of workers and inner city residents in the precinct

Domestic and international guests more prevalent on the weekends… with the proportion of these visitors in the precinct increasing significantly from 4% on Wednesdays, to 16% on Saturdays

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	61	+1	61	62	64	59
Female	39	-1	39	38	36	41
Under 30	48	-5	39	57	51	45
30-49	39	+5	45	33	38	40
50+	13	0	16	11	12	15
Inner city	57	+9	53	61	57	57
Greater Sydney	33	-3	36	30	39	27
Domestic visitors	4	-3	5	4	3	5
International visitors	6	-2	6	5	1	11
<$50K	25	-12	20	32	22	29
$50K to $100K	30	+4	28	31	31	28
$100K+	29	+8	36	21	34	23
Refused	16	-1	16	16	13	20
Work in the immediate area	45	+10	53	37	57	32

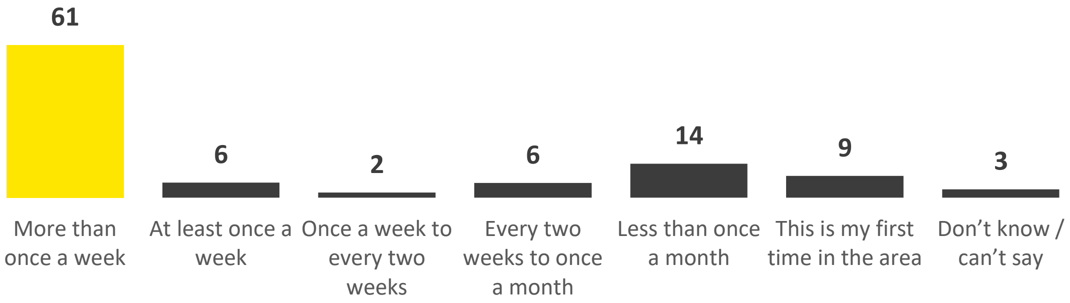
Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256)
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Less frequent visitors more likely to be in Pyrmont in the evening

Visitation frequency (%)

Overall



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	+9	-5	-3	-2	0	-1	+2
Day time	66	4	1	5	9	10	4
Night time	55	8	3	7	18	7	2
Wednesday	74	5	2	4	9	4	1
Saturday	46	7	2	7	18	13	6
Inner City	72	5	3	3	8	6	3
Greater Sydney	55	8	1	9	19	5	3
Domestic & international visitors	11	6	0	11	26	40	6

Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, Greater Sydney=177, Domestic and International visitors=53)
Q2

Pyrmont featuring high traffic from inner city residents who frequent the area often

3 in 5
from the inner city area, and of those..

7 in 10
visit the area multiple times a week

The area also has distinct day/night roles with…

44%
in the area for business during the day

43%
in the area for social/leisure at night

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The main reasons for visiting Pyrmont are either social/leisure activities or business

Pyrmont

A range of reasons for visiting the area… The variance in the daytime and night time profiles of the precinct impacted heavily on the main reasons for visiting. In particular, social and leisure activities were significantly more common in the evening (43% compared to 21% of daytime visitors), while business was significantly more common during the day (44% compared to 16%). Interestingly, the social/leisure score for Pyrmont was 12p.p. lower than the index across all precincts. This was most likely driven by the high proportion of business people in the area, and less likely to be a reflection of the night time offering of the precinct

Company visited the precinct with was heavily influenced by the proportion of workers in the area… Pyrmont was more likely to be visited by people on their own or with work colleagues – a reflection of the high proportion of workers in the area.

This changed dramatically in the evenings however, with visitors significantly more likely to be in the area after 6pm with their friends (31% compared to 15% during the day) or their spouse/partner (21% compared to 5% during the day)

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Social / leisure	32	-12	21	43	19	46	33	27	42
Business	31	+11	44	16	45	15	19	51	28
Passing through	16	+1	7	25	18	14	22	7	13
Shopping	9	-1	11	6	4	13	12	4	8
Sightseeing	5	-5	6	4	2	9	3	3	26
Catch public transport	5	-4	4	5	2	7	5	5	4
Appointment	2	-1	3	1	3	1	2	2	0

Company in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
On my own	50	+4	54	46	60	40	55	45	40
With friends	23	-9	15	31	13	34	22	23	23
Spouse / partner	13	-1	10	16	5	21	14	11	19
With work colleagues	11	+5	15	7	19	3	7	20	8
Other family	5	0	6	3	2	7	4	5	11
With children (<14yrs)	3	+1	6	0	2	4	4	1	2
With tour	1	0	0	1	0	1	0	0	6
With clients	0	0	0	0	0	0	0	1	0

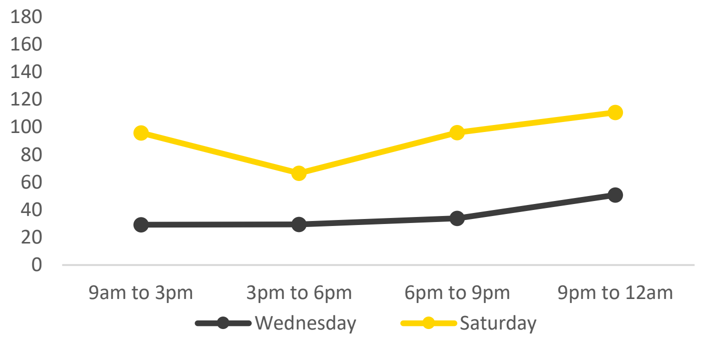
Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Greater Sydney=177, **Domestic and International visitors=53)
Q1, Q6

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

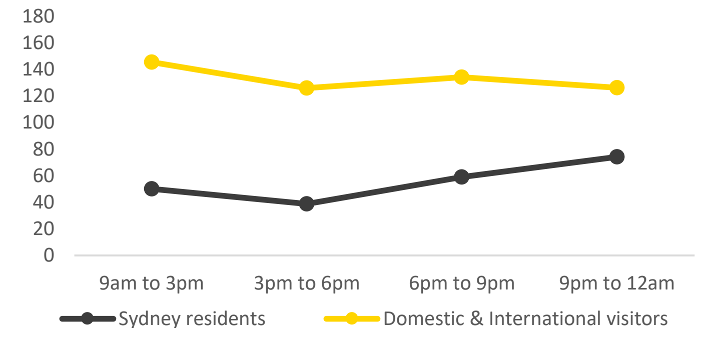
Domestic and International visitors are more likely to spend more in Pyrmont than Sydney residents

Pyrmont

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Visitor types ($)



Average total spend in the area ($)

$63

Average total spend in the area
(Index $60)

$53	$72	$36	$92
Day time	Night time	Wednesday	Saturday

$51	$62	$133
Inner city residents	G. Sydney visitors*	Dom + Intl visitors**

Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Greater Sydney=177, **Domestic and International visitors=53); Note: where indicative spend was > $1,500, these figures have been removed from the analysis
Q8, Q10

Night time and weekend visitors drove indicative spend… with an average indicative night time spend of $72 and weekend spend of $92. Domestic/international visitors drove spend in the area with an average indicative spend of $133

Those who visited licensed venues had significantly higher indicative spend overall… with an average indicative spend of $95, while those who drank coffee/tea ($59), browsed or bought from shops ($62) and/or attended business meetings or conferences ($64) had substantially lower indicative spend while in the precinct

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Activity in the area is highly driven by the time of day

Restaurants and cafes more likely to be busy during the day… with half purchasing food or drink during the day or having coffee/tea. These activities were significantly less common in the evening, with less than 2 in 4 purchasing food and only 1 in 4 drinking coffee/tea

Conversely, bars and pubs were significantly busier at night and on the weekends… with 1 in 3 visitors going to a bar or pub in the evening and 2 in 4 doing so on the weekends. Interestingly, 2 in 4 domestic or international visitors went to a bar/pub in the area – notably higher than locals in the area

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Food	45	-8	53	37	45	45	42	48	55
Coffee/tea	38	-5	51	24	38	37	35	40	43
Bar/pub	29	-4	24	35	22	38	24	34	43
Shopping	17	-3	24	11	11	25	19	12	26
Event, business meeting or conference	16	+3	20	11	18	13	13	20	19
Show friends/relatives around	12	0	16	8	8	17	14	8	17
Cultural attractions	8	-3	9	7	6	10	6	6	23
Overnight stay	8	-1	12	3	4	11	7	2	28

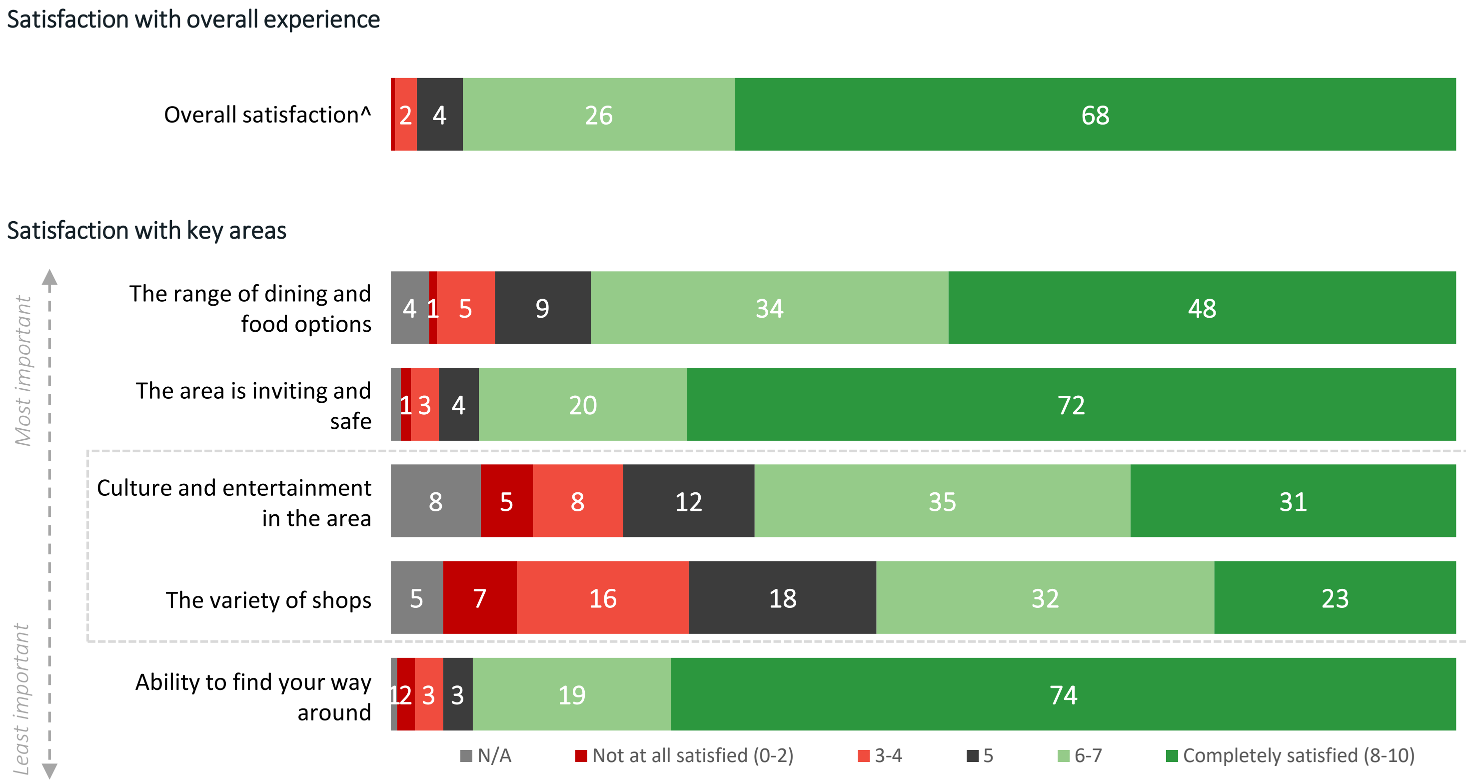
Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Greater Sydney=177, **Domestic and International visitors=53)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Overall satisfaction was positive but culture/entertainment and the variety of shops were rated lower than the index

Pyrmont

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Overall satisfaction^	+10	68	68	59	77	68	66	74
The range of dining and food options	-8	47	48	44	52	47	49	51
The area is inviting and safe	+9	74	70	72	72	72	72	75
Culture and entertainment in the area	-14	28	33	25	36	30	32	30
The variety of shops	-18	20	25	20	26	24	20	25
Ability to find your way around	+1	74	74	76	71	78	72	58

Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Greater Sydney=177, **Domestic and International visitors=53)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Visitors identify an opportunity to expand the variety and range of shops and food options in the area

Pyrmont

Limited shopping options highlighted by many… satisfaction with the variety of shops was 18 p.p. below the index across all precincts. With that in mind, 1 in 3 felt addressing this would have a positive impact on their experiences in the area

Transportation also a key consideration… with around 1 in 6 indicating that improving this aspect of the precinct would positively impact on their overall experience in the area – 6.p.p higher than the index across all precincts

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Wider range and availability of shops	35	+5	33	38	39	32	39	31	32
More food options	25	+5	24	25	26	24	30	20	11
Improved entertainment & cultural offerings	20	0	17	24	19	22	22	15	28
Improved transportation to/from	18	+6	18	18	21	14	19	18	9
More parking available	16	+3	17	15	14	18	16	18	13
Better value for money/cheaper	13	-4	11	14	11	14	14	12	8
More bars/beverage options	11	-2	7	16	10	13	13	8	11
More parks/green area	11	-3	11	10	11	10	11	11	8
Improved cleanliness	8	-6	8	7	6	9	9	5	8
Improved security/safety	6	-6	2	9	4	7	7	4	6
Better signage wayfinding	5	-3	3	7	5	5	5	2	11
Construction completion	3	-10	4	2	4	3	4	3	4

Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Greater Sydney=177, **Domestic and International visitors=53)
Q13, Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Walking is the preferred mode of transportation, particularly during the day

Pyrmont

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	57	+10	63	51	55	59	71	34	51
Bus	16	-4	15	17	17	15	12	25	9
Drive	16	+5	19	13	17	15	10	28	13
Train	15	-18	17	13	18	12	7	29	11
Light rail	10	+8	11	8	14	5	8	11	13

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	55	+11	61	49	54	57	69	33	53
Bus	19	-4	18	20	21	16	15	27	11
Drive	16	+5	19	12	16	15	9	28	15
Train	13	-18	15	11	17	10	7	25	11
Light rail	9	+8	11	7	13	5	8	11	11

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Knowledge of the area	77	+5	81	72	82	70	84	75	40
Phone maps / apps	33	-5	30	37	31	36	24	38	68
Signage in the area	4	-2	2	5	3	5	4	2	8
Asked staff / officials for guidance	2	0	0	3	1	2	1	1	6
Asked friends/family for directions	1	-3	0	2	1	1	1	2	0
Printed map / guide book	1	-1	2	0	0	2	0	2	2
Tour guide	1	0	0	2	0	2	0	0	9

Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Greater Sydney=177, **Domestic and International visitors=53)
Q4, Q5, Q14

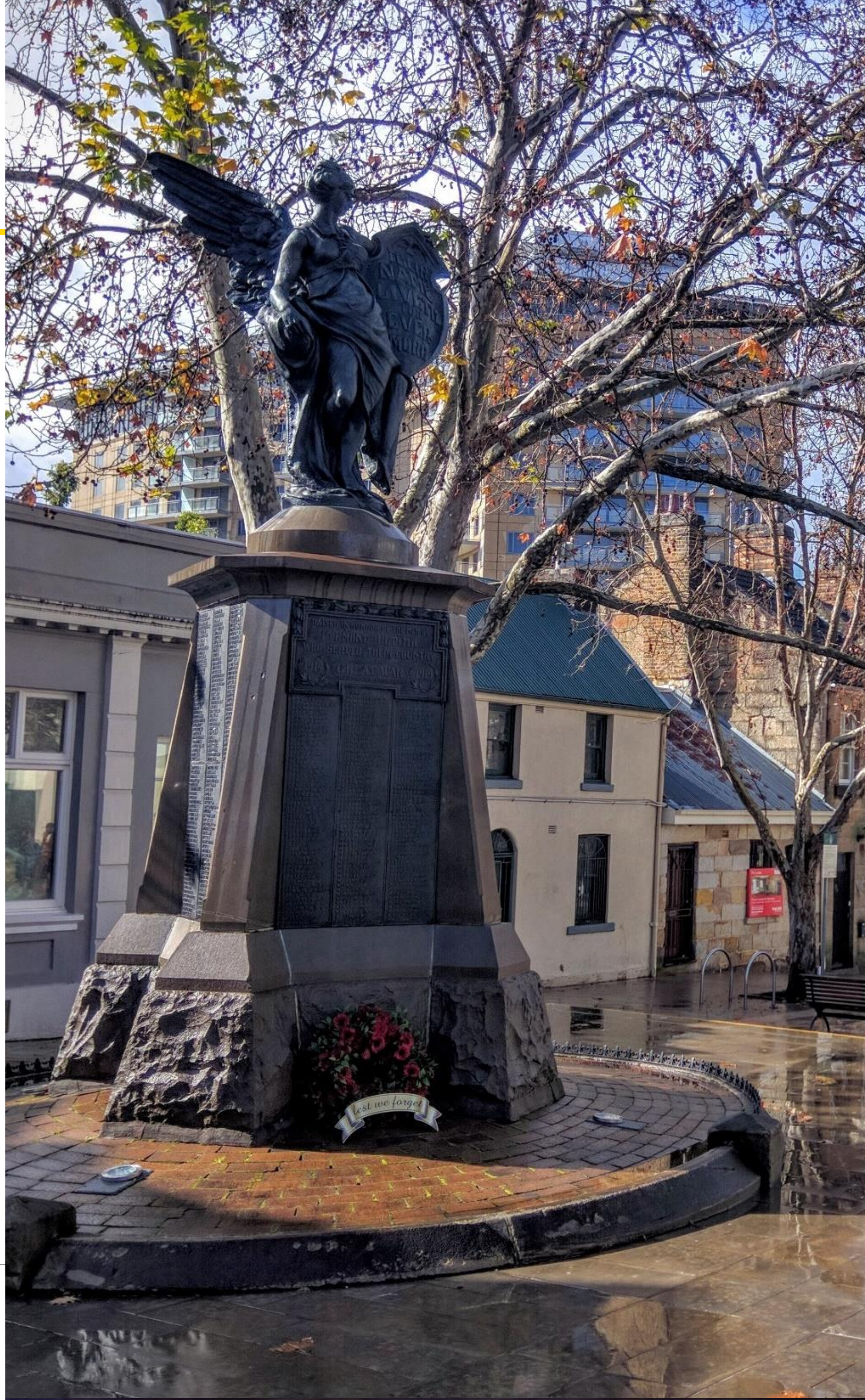
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Personal recommendations and social media were the most commonly used channels to find out about things to do in the area

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Recommended by friends, family or work colleagues	50	+1	47	53	51	49	48	54	47
Social media	44	-5	44	44	44	44	46	44	34
Search engines	31	-3	34	27	28	34	32	28	34
Other websites	13	0	15	10	16	10	13	11	17
Event websites	11	0	15	6	12	9	11	11	9
Travel websites	8	-2	6	10	11	5	9	6	15
Newspapers	8	-1	9	6	6	9	10	3	9
City of Sydney website	6	-2	8	5	6	7	7	5	8
TV programmes	5	0	6	4	5	5	5	6	2
Radio	4	0	4	3	3	5	4	3	4
Membership emails (e.g. Opera House)	2	-1	2	3	3	2	2	3	2
Tourist flyers	2	-2	3	1	1	3	3	0	4
Travel agents or tour guides	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Great Sydney=177, **Domestic and International visitors=53)
D1



EY Sweeney

Additional precinct deep dives

The following section provides results for four additional precincts surveyed in October 2017. See the following page for more details.

Scorecard: Precinct visitor profile

Throughout the following section, findings for an additional four precincts are provided. These include:

- Glebe and the surrounding areas
- Redfern and the surrounding areas
- Surry Hills and the surrounding areas
- Green Square and the surrounding areas

Data for each of these precincts were collected in October 2017. Due to the time difference in data collection, City of Sydney determined that these fours precincts should be reported separately to the initial seven precincts, surveyed in April to June 2017. All due care has been taken to maintain a consistent research methodology and survey approach across both periods.

Due to this difference in survey timing, all indexes displayed throughout the following sections have been calculated based on these four precincts and do not take in to consideration the seven precincts surveyed in June 2017.




		Glebe	Redfern	Surry Hills	Green Square
GENDER	Male	51	66	53	62
	Female	49	34	47	38
AGE	Under 30	47	53	45	59
	30-49	36	35	38	31
	50+	16	12	17	10
RESIDENTIAL LOCATION	Inner city	78	72	70	74
	Greater Sydney	15	22	23	18
	Domestic visitors	3	3	5	3
	International visitors	4	2	3	5
HOUSEHOLD INCOME	<$50K	36	38	29	30
	$50K to $100K	21	31	29	30
	$100K+	28	19	28	29
	Refused	16	12	13	11
	Work in the immediate area	30	28	32	26

Base: all respondents, n=2,119; respondents interviewed in the following areas – Glebe area, n=528; Redfern area, n=536; Surry Hills area, n=533; Green Square area, n=522
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Scorecard: Precinct satisfaction ratings

	Index	Glebe	Redfern	Surry Hills	Green Square
Overall satisfaction with visit (Proportion who rated their visit as 8-10 / 10)	65	75	55	67	64
The range of dining and food options	55	71	39	74	35
The area is inviting and safe	61	63	44	63	75
Culture and entertainment in the area	34	43	26	46	20
The variety of shops	38	51	25	46	30
Ability to find your way around	75	82	73	75	71

Activities in the precinct

	Index	Glebe	Redfern	Surry Hills	Green Square
Food	54	57	40	64	53
Coffee/tea	45	45	33	51	50
Bar/pub	26	19	24	44	16
Shopping	35	38	20	34	46
Show friends/relatives around	13	11	9	15	18
Event, business meeting or conference	10	9	7	17	5
Cultural attractions	10	13	8	14	4
Overnight stay	9	7	3	14	11

Base: all respondents, n=2,119; respondents interviewed in the following areas – Glebe area, n=528; Redfern area, n=536; Surry Hills area, n=533; Green Square area, n=522
Q3, Q11, Q12

GLEBE AND SURROUNDS

REDFERN AND SURROUNDS

SURRY HILLS AND SURROUNDS

GREEN SQUARE AND SURROUNDS

Glebe and surrounds area

Glebe is a hub for locals, with 4 in 5 visitors living in the inner city

Greater Sydney residents less likely to visit Glebe… while there was a relatively high proportion of inner city residents in the Glebe area, residents from the Greater Sydney area were somewhat less likely to visit, with the representation of this audience 5p.p. lower than the index.

Glebe has distinct daytime and night time visitor profiles… the profile of visitors to Glebe during the day was notably different to visitors in the evening. For example, during the day the proportion of females in the area (57%) was significantly higher than males (43%). Similarly, 1 in 5 daytime visitors were aged 50+. This profile changed in the evenings however, with the proportion of males increasing significantly to 3 in 5 (while females decreased to 41%), over 50's also decreased notably to 1 in 10 people in the area

Weekday visitors come to the area more frequently… around 4 in 5 people on a Wednesday indicated they visit the Glebe and/or surrounding areas more than once a week. This is likely driven by a high proportion of local residents in Glebe, with 3 in 4 inner city residents also saying they visit the area at least once a week. Interestingly, only around half of the people in the area on a Saturday visit Glebe more than once a week, while around 14% said they visit less than once a month and 1 in 10 had never visited the area previously

Profile of visitors in the precinct (%)

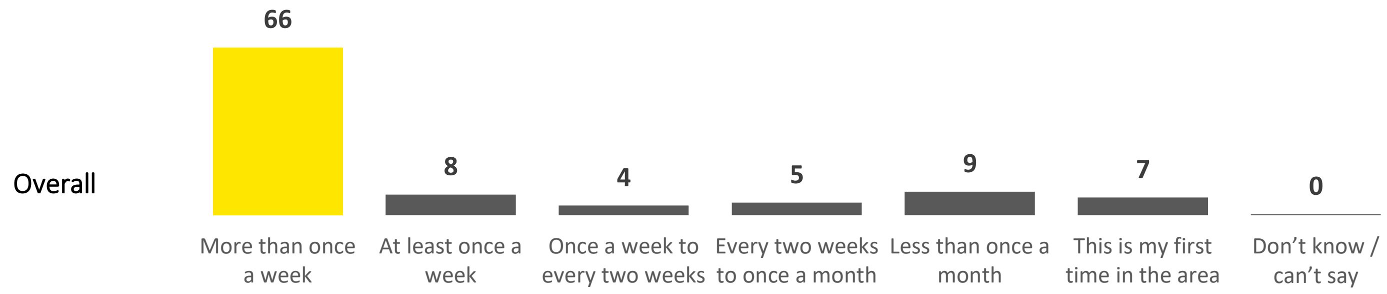
	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	51	-7	43	59	53	48
Female	49	+7	57	41	47	52
		0				
Under 30	47	-4	43	51	46	49
30-49	36	+1	35	38	36	37
50+	16	+3	22	11	19	14
Inner city	78	+5	75	81	76	81
Greater Sydney	15	-5	18	11	18	11
Domestic visitors	3	0	3	4	4	3
International visitors	4	0	4	3	2	5
<$50K	36	+3	37	35	35	38
$50K to $100K	21	-7	21	21	21	21
$100K+	28	+2	26	29	29	26
Refused	16	+2	17	14	16	15
Work in the immediate area	30	+1	32	29	34	27

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259).
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

A high proportion of local residents in the area means that two-thirds of people visit more than once per week

Visitation frequency (%)



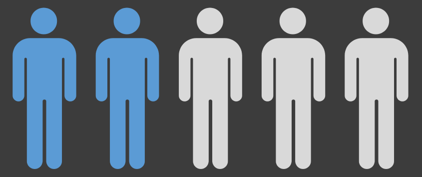
	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	+1	+1	0	+1	-1	-1	0
Day time	68	7	4	4	7	10	1
Night time	65	10	3	6	12	4	0
Wednesday	78	7	4	3	4	3	0
Saturday	55	9	3	7	14	11	1
Inner city	73	9	3	4	7	4	0
Greater Sydney	52	9	5	8	18	6	1
Domestic & international visitors	21	0	11	8	21	39	0

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, Greater Sydney=77, Domestic and International visitors=38)
Q2

Glebe is a hub for local residents, with…

3 in 4
Visiting the area more than once a week

However, there is an opportunity to build interactions with local business, with only…



2 in 5
Shopping while in the area

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The majority visit Glebe or surrounding areas on their own

Inner city residents are less likely to engage with the precinct… with 1 in 3 indicating they were just passing through the area – this is relatively high compared to inner city residents in other precincts. Going forward it may be useful for local businesses to consider potential strategies to engage these people while they are traversing the area

Social and leisure activities more common on the weekend… with around half of the visitors on Saturdays indicating they were in the area for social or leisure purposes. In contrast, only 1 in 3 weekday visitors indicated they were in Glebe or the surrounding areas for this reason

Weekday visitors more likely to be on their own… visitors in the Glebe area on a Wednesday were more likely to be on their own (67%) compared to weekend visitors (46%). In contrast, people in the area on the weekend were significantly more likely to be with friends (28%) or their spouse/partner (19%)

Social and leisure offerings attract a range of audiences… with 7 in 10 people who were in the precinct with friends indicating they undertook social/leisure activities. Along with this, 2 in 3 people who were with their spouse/partner or other family said they did social or leisure activities

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Social / leisure	41	+4	39	44	33	49	38	48	58
Passing through	30	+7	31	30	33	28	33	18	24
Shopping	18	-2	22	13	22	14	20	13	5
Business	9	-2	12	7	12	7	6	23	16
Catch public transport	7	-1	10	4	9	6	8	4	0
Sightseeing	3	0	5	1	2	4	2	1	21
Appointment	2	0	3	1	4	0	3	1	0

Company in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
On my own	57	-1	57	56	67	46	60	53	34
Friends	21	-2	16	26	15	28	20	23	29
Spouse / partner	13	+1	12	15	8	19	13	14	18
Other family members	5	+1	7	3	3	6	4	1	18
Children (<15 years)	4	+2	7	2	3	5	4	5	5
Work colleagues	3	0	5	0	4	2	1	10	0
Tour	0	0	1	0	0	1	0	0	5
Clients	0	0	1	0	1	0	0	1	0

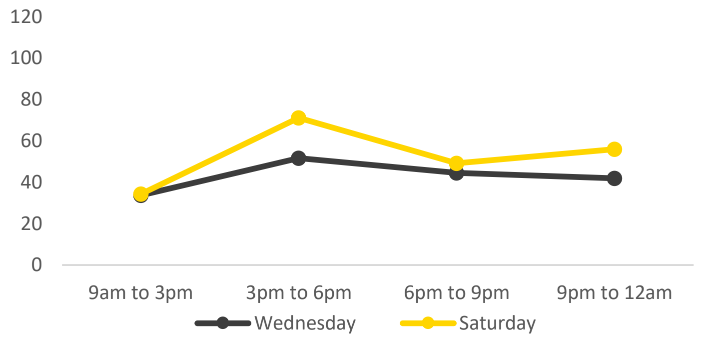
Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38)
Q1, Q6

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

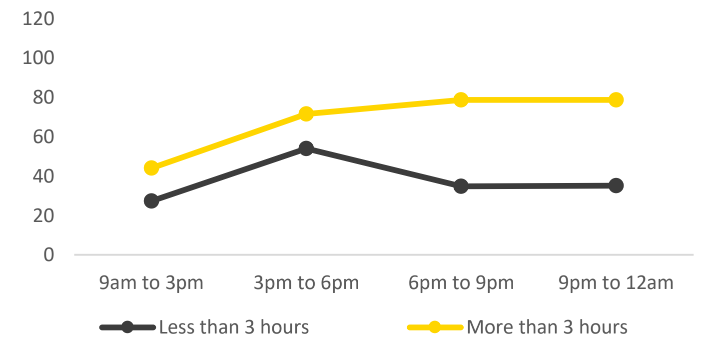
Spending in Glebe is typically at its highest during the hours of 3pm to 6pm

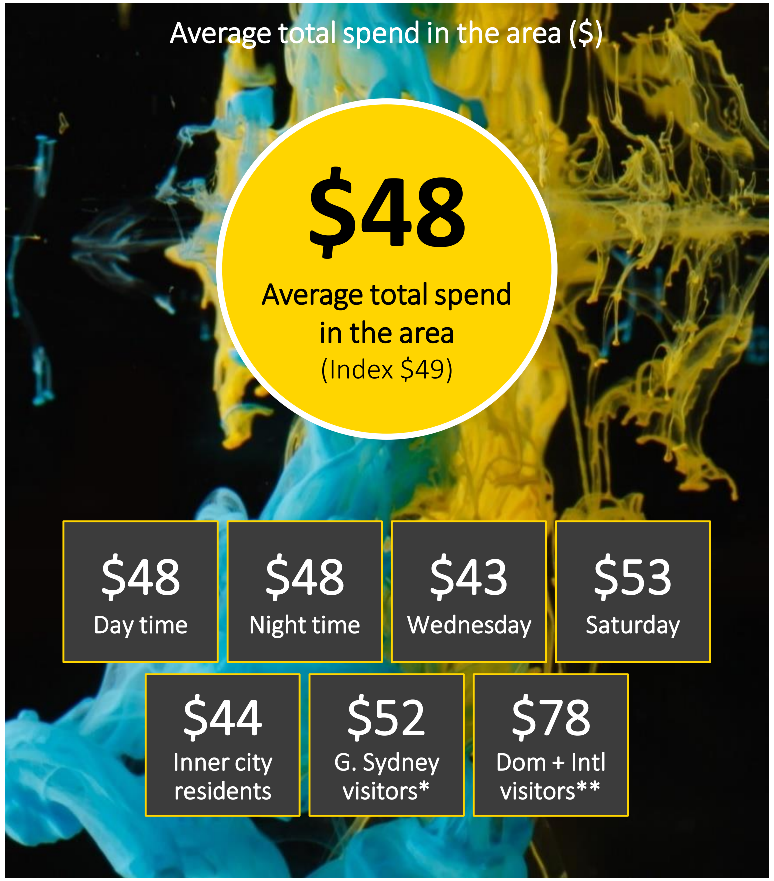
Glebe

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Time spent in the area ($)





Spending outcomes higher amongst domestic and international visitors… with this group having an average total indicative spend of $78. In contrast, inner city residents and those from the greater Sydney area spent marginally less while in the area ($44 and $52 respectively)

People in the area for more than 3 hours in the evening spent notably more… the average amount visitors recalled spending while in Glebe or the surrounding areas increased substantially in the evening – but only amongst those who were in the area for more than three hours, with an average total spend of $79 amongst this audience, compared to $35 amongst those who were in the area for less time

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Around 3 in 5 visitors purchase food while they are in Glebe or the surrounding area

Glebe

Domestic and international visitors often dine while in the area… with three-quarters of this audience indicating they ate/purchased food while in the area. Alternatively, locals (54%) were significantly less likely to purchase or eat food in the Glebe area. This supports the finding that a number of inner city residents are passing through Glebe without engaging any of the F&B or shopping offerings in the area

Coffee/tea and shopping more common during the day… with 3 in 5 daytime visitors saying they had coffee or tea and half saying they went shopping while in the area (compared to 30% of night time visitors). In contrast, night time visitors were significantly more likely to visit a bar or pub (24% compared to 15% of those in the daytime)

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Food	57	+3	56	57	55	58	54	62	76
Coffee/tea	45	0	59	30	40	49	44	43	53
Shopping	38	+4	47	30	42	34	40	31	32
Bar/pub	19	-7	15	24	15	24	19	23	16
Cultural attractions	13	+3	17	9	9	17	12	14	24
Show friends/relatives around	11	-2	11	10	9	12	11	9	13
Event, business meeting or conference	9	0	11	7	9	10	8	18	11
Overnight stay	7	-2	10	3	4	9	5	4	29

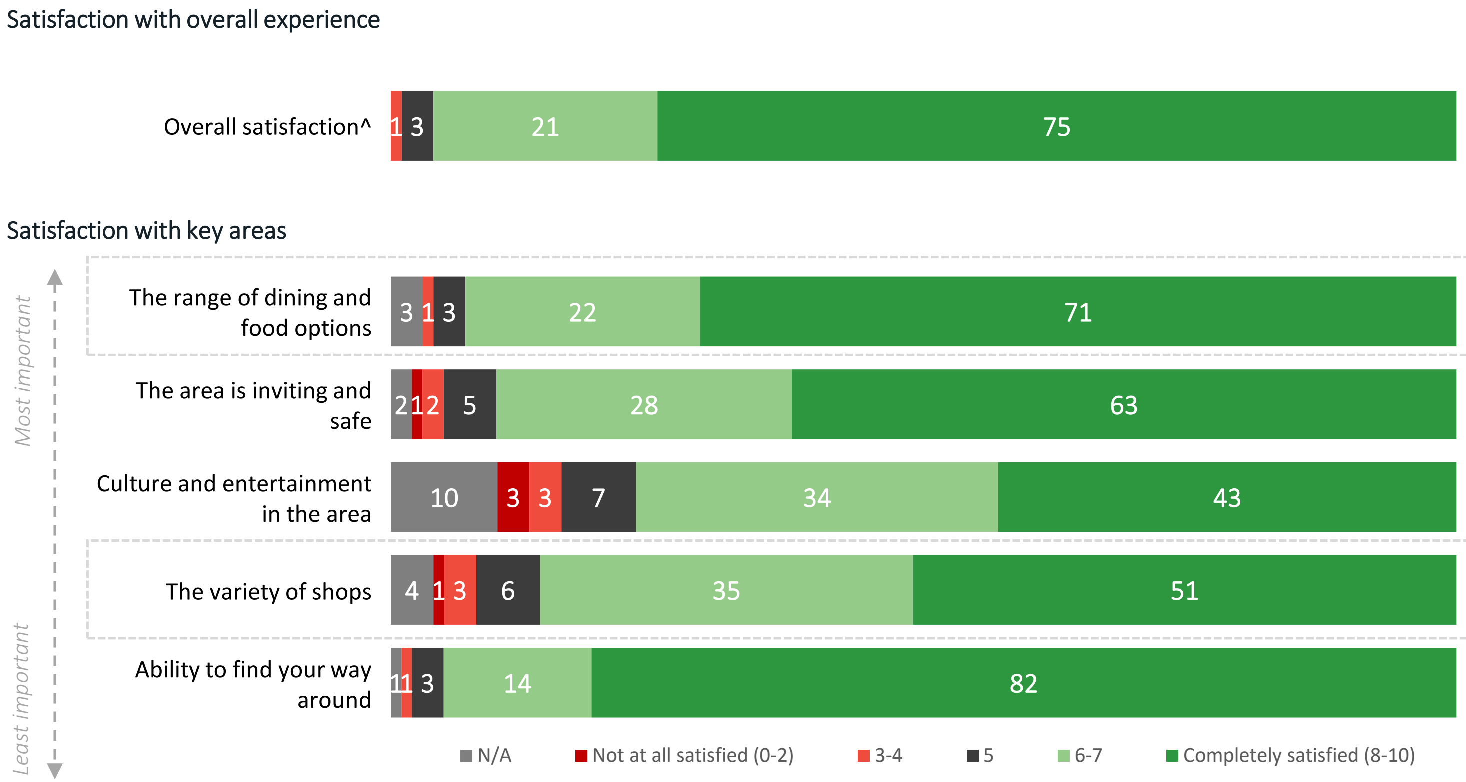
Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Positive satisfaction outcomes overall, driven by a range of food and dining options and a variety of shops in the area

Glebe

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Overall satisfaction^	+9	76	73	76	73	77	64	76
The range of dining and food options	+16	68	74	72	70	71	65	82
The area is inviting and safe	+2	61	64	64	61	61	64	79
Culture and entertainment in the area	+9	37	49	43	43	42	47	39
The variety of shops	+13	52	50	53	49	52	52	42
Ability to find your way around	+6	82	81	84	79	83	83	68

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Most are satisfied with the F&B and shopping aspects of the precinct

Most visitors had a highly positive experience in the area... with 3 in 4 visitors indicating they were highly satisfied with their visit – 9p.p. higher than the index across all precincts. Factors that drove these positive experiences were the range of food and dining options (16p.p. higher than the index), the culture and entertainment in the area (9p.p. higher than the index), the variety of shops (13p.p. higher than the index) and wayfinding in the area (6p.p. higher than the index)

Some opportunity to improve night time shopping, dining and transportation options... when asked to identify opportunities for improving the Glebe area, night time visitors were significantly more likely than daytime visitors to indicate that a wider range and availability of shops (24% compared to 14% of daytime visitors), improved entertainment and cultural offerings (20% compared to 9% of daytime visitors) and improved transportation to/from the area (17% compared to 9%) were key areas where the precinct could be developed

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Wider range and availability of shops	19	-9	14	24	17	21	20	12	21
Improved entertainment & cultural offerings	15	-4	9	20	13	17	16	9	8
Improved transportation to/from	13	+3	9	17	13	13	14	13	3
More parking available	11	0	13	10	7	15	10	19	3
More food options	11	-8	11	11	10	12	12	12	3
Better value for money/cheaper	8	0	10	7	8	9	7	14	11
More parks/green areas	8	-1	9	8	7	10	8	5	13
Improved security/safety	8	-1	9	7	8	8	8	9	5
More bars/beverage options	7	-4	4	10	8	7	8	6	8
Improved cleanliness	5	-2	6	3	4	5	5	5	0
Better signage/wayfinding	3	-1	3	4	4	3	3	4	5
Construction completion	0	-10	0	0	0	0	0	0	0

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

EY Sweeney

Inner city residents primarily walk to and from the precinct – particularly during the week

Glebe

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	64	+4	70	58	73	55	69	40	63
Bus	25	+9	21	29	24	26	22	42	24
Drive	15	+2	12	17	13	16	13	27	13
Train	7	-14	7	6	7	6	4	17	16
Taxi/Uber	3	-1	2	4	2	5	3	3	11

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	59	+1	62	57	67	51	62	38	66
Bus	29	+11	30	28	28	31	26	44	26
Drive	13	0	12	14	12	14	10	27	11
Train	6	-12	6	6	6	6	3	17	13
Taxi/Uber	4	-1	2	6	3	6	4	3	5

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Knowledge of the area	79	0	81	77	86	72	84	77	34
Phone maps / apps	33	+1	30	37	26	41	28	43	71
Signage in the area	4	-1	7	2	6	3	3	9	13
Asked friends/family for directions	2	-1	3	2	1	4	2	3	5
Asked staff / officials for guidance	1	0	1	0	0	1	1	0	3
Printed map / guide book	1	0	1	0	0	1	0	0	3
Tour guide	0	0	1	0	0	1	0	0	5

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social media is an important tool for helping people find things to do in the precinct – particularly in the evenings

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Social media	55	-2	49	62	58	52	57	51	45
Search engines	45	-2	51	40	45	46	42	56	66
Recommended by friends, family or work colleagues	41	-3	36	47	37	46	43	32	45
Event websites	17	+3	16	17	17	16	17	17	8
Other websites	13	-2	14	12	15	11	12	17	16
City of Sydney website	10	+1	9	11	11	8	10	9	8
Travel websites	9	+1	12	6	11	7	7	13	26
Newspapers	9	0	10	7	12	5	11	3	0
TV programmes	6	0	7	6	6	6	7	5	5
Radio	5	0	4	5	4	6	6	3	3
Membership emails (e.g. Opera House)	5	0	4	5	7	2	6	3	0
Tourist flyers	3	+1	3	4	4	2	4	3	3
Travel agents or tour guides	1	0	0	1	0	2	0	0	11

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38)
D1

EY Sweeney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

GLEBE AND SURROUNDS

REDFERN AND SURROUNDS

SURRY HILLS AND SURROUNDS

GREEN SQUARE AND SURROUNDS

Redfern and surrounds area

Redfern is a key transportation hub for workers in the inner city area

As a precinct, Redfern currently skews towards males… overall, two-thirds of people in the area were male. This proportion increased marginally in the evening with 62% of visitors between 9am to 6pm being male compared to 3 in 4 visitors between 9pm to 12am. Males were also more likely to be regular visitors in the area multiple times a week (75% compared to 63% of females in the area). This result may be the result of having a relatively high number of construction projects in or around the area, with tradespeople often skewing heavily towards males – the high proportion of males in Redfern travelling by themselves (69%) would potentially support this hypothesis.

Redfern often acts as a thoroughfare for people in the inner city area… visitors in the Redfern area were significantly less likely to spend large amounts of time in the precinct compared with other areas surveyed, with 43% of visitors spending less than an hour in the area (11p.p. higher than the index across all precincts). This appears to be driven by the high proportion of people that were passing through the area, or catching public transport.

As highlighted above, this may relate to the large number of workers or tradesmen in, or around Redfern.

Visitors skewed towards younger, inner city locals at night… while around 1 in 2 people in the precinct during the day indicated they were under 30 years of age, this increased to 3 in 5 people after 6pm. Similarly, a greater proportion of people from the inner city area were more likely to be visiting during the evening – accounting for around 4 in 5 people after 6pm (compared to 2 in 3 people during the day)

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	66	+8	62	71	63	70
Female	34	-8	38	29	37	30
Under 30	53	+2	47	60	53	54
30-49	35	0	37	33	36	35
50+	12	-2	16	7	12	12
Inner city	72	-1	66	79	71	74
Greater Sydney	22	+3	26	18	23	21
Domestic visitors	3	0	4	2	3	3
International visitors	2	-1	4	0	2	2
<$50K	38	+4	37	38	43	32
$50K to $100K	31	+3	27	35	29	33
$100K+	19	-7	23	15	17	21
Refused	12	-1	13	12	11	14
Work in the immediate area	28	-1	32	23	28	27

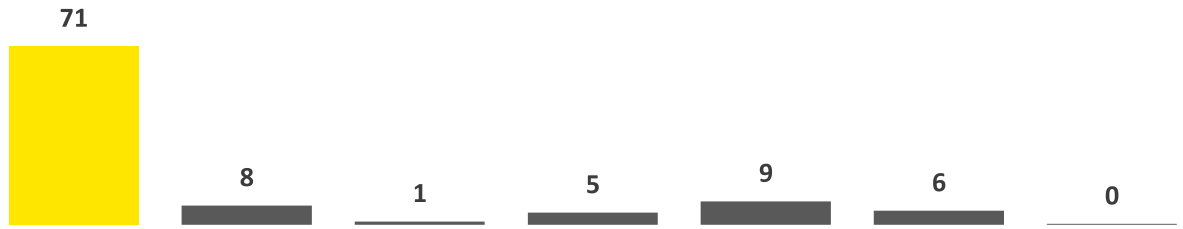
Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255).
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

While inner city residents visit the area often, half of domestic and international visitors were in the area for the first time

Redfern

Visitation frequency (%)



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Overall	71	8	1	5	9	6	0
Index (Diff)	-3	+1	+2	+1	-1	0	0
Day time	69	8	1	5	11	6	0
Night time	73	8	2	5	7	5	0
Wednesday	73	7	0	5	7	6	0
Saturday	68	8	2	4	11	5	0
Inner city	80	7	1	3	6	3	0
Greater Sydney	53	10	3	12	15	5	2
Domestic & international visitors	18	7	0	0	25	50	0

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, Greater Sydney=120, Domestic and International visitors=28 – low base, results indicative only)
Q2

Redfern features a high proportion of visitors mainly on their way to other destinations, with…

44%

catching public transport or just passing through on their way to another location

Meaning that…

43%

spent less than an hour in the area

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Redfern a key transportation hub, particularly for people in the evening

Redfern

Passing through or catching transport were some of the main reasons for being in the area… with 1 in 3 people in the area indicating they were just passing through on their way to another area (9p.p. higher than the index across all precincts), and 1 in 5 catching public transport (12p.p. higher than the index)

Time of day had a strong influence on peoples reasons for visiting… apart from acting as a thoroughfare, daytime visitors were also likely to visit for business, and shopping. In the evenings, social and leisure activities were increasingly prominent with visitors more likely to visit for this reason (37% compared to 27% in the daytime)

Reflecting the main purpose of transportation, visitors most likely to be on their own… with two-thirds of visitors on their own (8p.p. higher than the index across all precincts) – perhaps unsurprisingly, this figure was significantly higher during the week (73% on Wednesdays, compared to 56% on Saturdays)

Night time social activities attract groups… with people in the area more likely to be accompanied by others in the evening – particular on the weekend, where half of visitors after 6pm were with friends or a spouse/partner. Interestingly males were also more likely to be unaccompanied (69% compared to 58% amongst females)

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Passing through	32	+9	35	29	31	33	33	31	21
Social / leisure	32	-6	27	37	21	44	30	33	54
Catch public transport	19	+12	15	25	25	13	19	24	0
Business	11	0	16	5	15	6	9	17	21
Shopping	11	-9	15	5	7	15	12	7	11
Sightseeing	3	0	5	1	2	4	1	5	21
Appointment	1	-1	3	0	3	0	2	2	0

Company in the precinct (%)

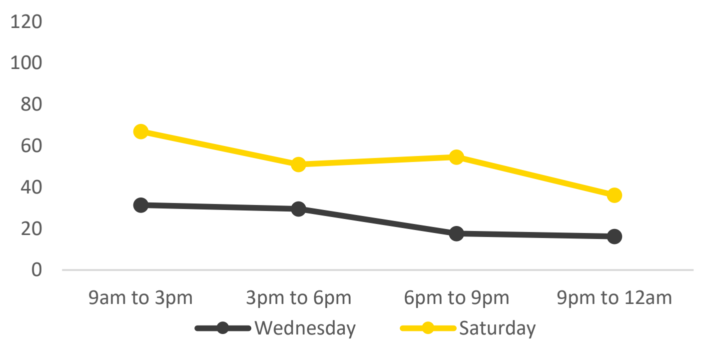
	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
On my own	65	+8	68	63	73	56	67	63	57
Friends	21	-2	18	25	15	28	18	29	32
Spouse / partner	10	-3	8	12	7	13	11	6	7
Other family members	2	-2	4	0	2	2	2	3	7
Work colleagues	1	-1	2	1	2	1	2	1	0
Children (<15 years)	1	-1	3	0	1	1	2	1	0
Tour	0	0	0	0	0	0	0	0	4
Clients	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28 – low base, results indicative only)
Q1, Q6

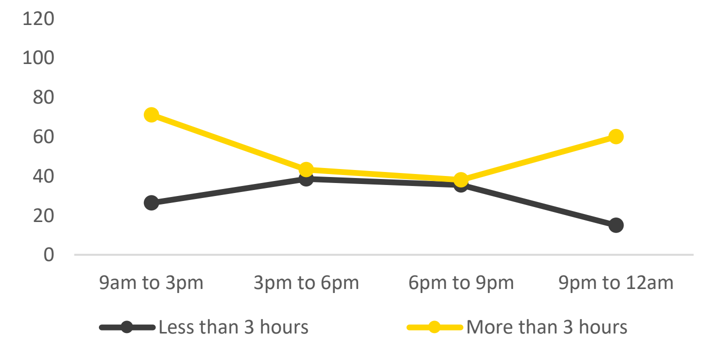
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

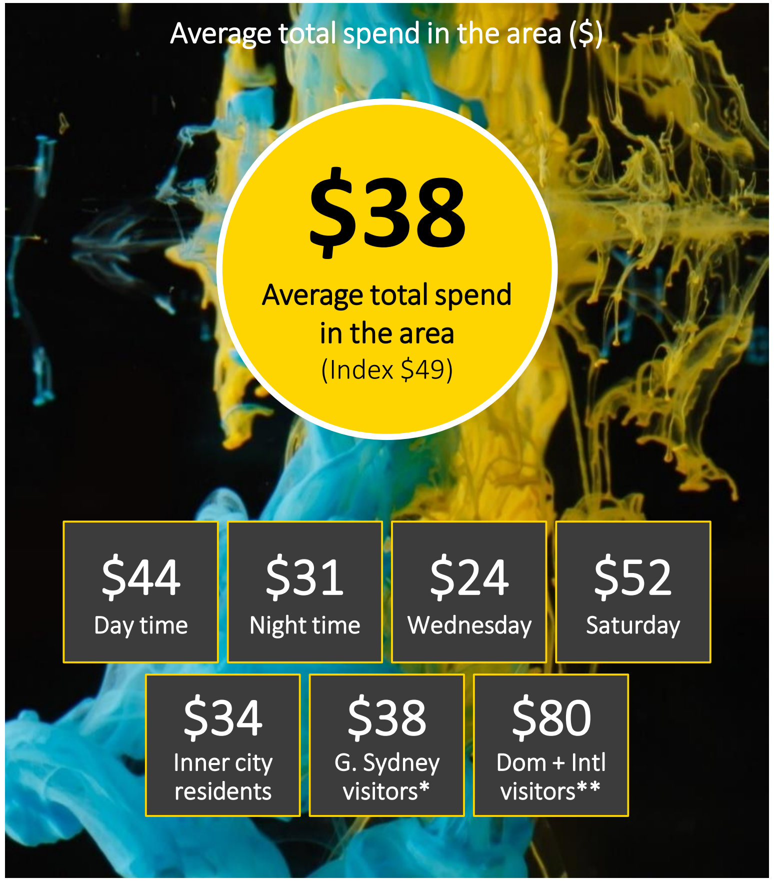
Indicative spend for Redfern lower than the index

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Time spent in the area ($)





Due to the high number of people just passing through, indicative spend is relatively low in Redfern… with an average total spend of $38 ($11 lower than the index across all precincts). This is primarily driven by the purpose of visitors, with those passing through ($22) or catching public transport ($11) citing lower indicative spend compared to visitors with a dedicated purpose in the area such as social or leisure commitments ($67) or shopping ($89)

Time of day also had an impact on average spend in the precinct… with the average indicative spend at night time marginally lower than during the day. This was also driven by lower indicative spend on weekdays after 6pm

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28 – low base, results indicative only). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Activities in general were less likely to be engaged in Redfern compared with other precincts

Redfern

F&B and shopping notably lower in the Redfern precinct compared to other areas… with 63% of visitors indicating they had food or drinks while in the area – 10p.p. lower than the index across all precincts. This was largely a result of the high number of people that were just passing through the Redfern area, or catching public transport

Shopping more common during the day… with visitors four times more likely to be shopping during the day (9am to 6pm) compared to the evening (6pm to 12am). With that in mind, overall shopping behaviour was lower in Redfern compared with other precincts (15p.p. lower than the index across all precincts), with the high volume of commuter traffic in the area, an opportunity exists to optimise the shopping and retail offer in the area

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Food	40	-14	44	35	39	41	39	37	61
Coffee/tea	33	-11	45	20	38	27	32	35	46
Bar/pub	24	-2	19	30	20	29	25	19	39
Shopping	20	-15	31	8	18	22	21	17	25
Show friends/relatives around	9	-4	9	10	9	10	9	11	11
Cultural attractions	8	-2	8	8	6	10	7	9	7
Event, business meeting or conference	7	-2	10	5	10	5	5	14	7
Overnight stay	3	-6	3	3	2	4	2	1	18

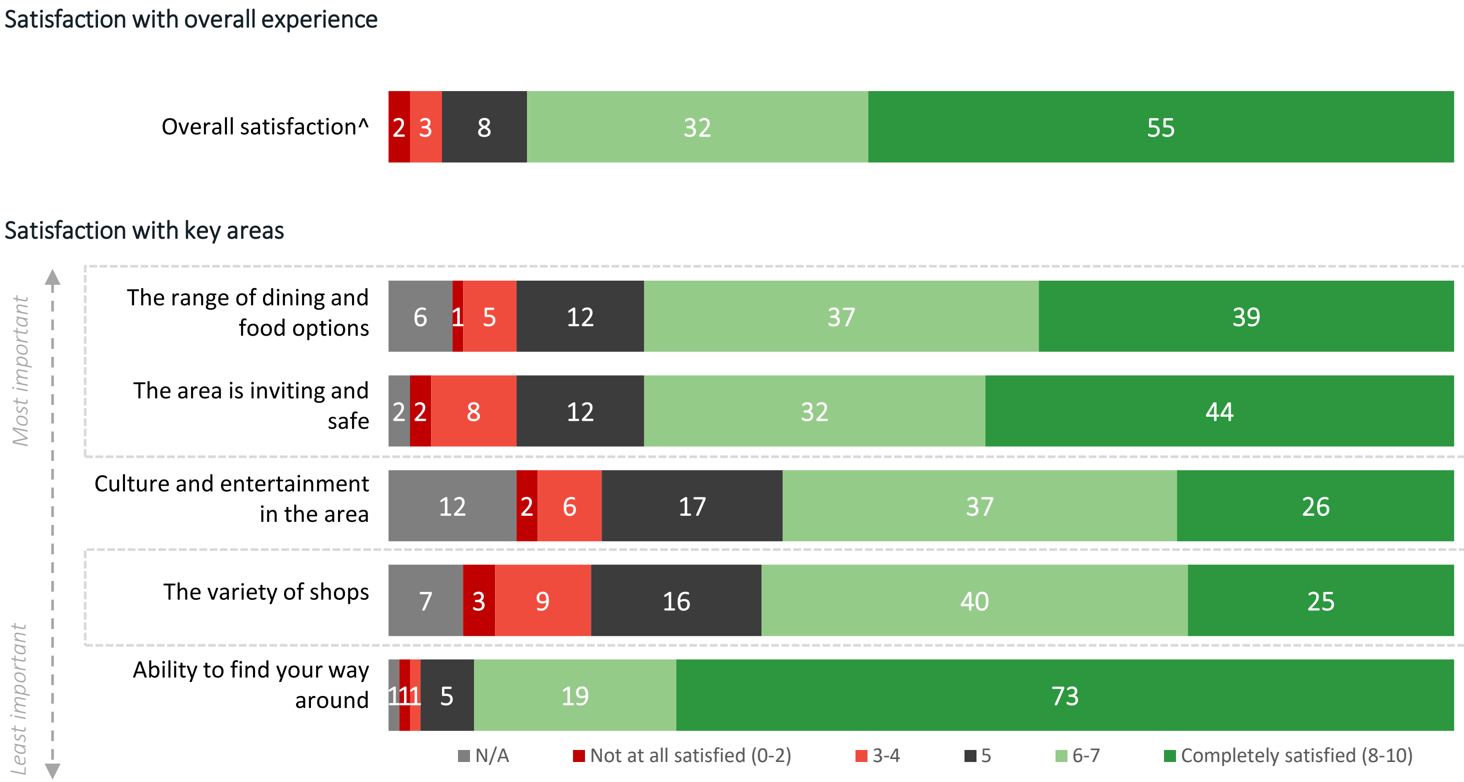
Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28 – low base, results indicative only)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Overall satisfaction was lower than other precincts, driven by some perceived safety concerns as well as limited interactions with the F&B and retail offerings in the area

Redfern

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Overall satisfaction^	-10	55	56	52	59	57	52	54
The range of dining and food options	-16	40	39	30	49	40	36	39
The area is inviting and safe	-17	43	45	42	46	45	40	43
Culture and entertainment in the area	-8	26	27	21	32	28	23	18
The variety of shops	-13	27	24	17	34	24	25	39
Ability to find your way around	-2	73	74	73	74	78	63	50

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28 – low base, results indicative only)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The range of shops and food options, as well as safety were seen to be key building areas for the precinct

Redfern

Shopping, dining and entertainment in Redfern is recognised as key areas for improvement… with relatively low satisfaction outcomes across each of these aspects, visitors suggested that a wider range and availability of shops, and a more comprehensive F&B offering could help improve their experiences in the area. Improving the availability and awareness of cafes and restaurants, as well as shops in Redfern may be a key consideration for City of Sydney going forward

Safety a key concern for some visitors… while 44% were strongly satisfied that the Redfern area is inviting and safe, this outcome was substantially lower than other precincts (17p.p.lower than the index across all precincts). For that reason, 17% of respondents suggested that improving security could be a key development area for the precinct. It is important to note, this research measures community perceptions, and should not be treated as a definitive indicator of security in the Redfern area. Those concerned with safety in the area highlighted too many scary or drunken people (73%) as their main concern

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Wider range and availability of shops	32	+4	29	36	34	29	33	32	18
More food options	21	+3	19	24	24	19	23	18	21
Improved entertainment & cultural offerings	19	0	17	21	20	18	22	13	4
Improved security/safety	17	+8	18	16	19	15	18	16	11
More bars/beverage options	11	0	7	16	9	14	12	9	11
Improved cleanliness	10	+4	14	6	14	7	12	6	7
More parking available	10	-1	11	9	9	12	12	4	11
More parks/green areas	10	+1	10	9	12	7	10	9	7
Improved transportation to/from	8	-3	8	9	9	7	7	13	4
Better value for money/cheaper	5	-3	5	6	5	6	6	3	4
Better signage/wayfinding	5	+1	5	6	5	5	5	8	7
Construction completion	5	-6	4	6	5	4	5	3	4

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28 – low base, results indicative only)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The majority of visitors walk or take the train to and from Redfern, this alternated between weekdays and weekends

Redfern

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	57	-4	61	52	43	72	60	48	50
Train	46	+25	44	48	57	35	40	68	39
Bus	10	-6	11	9	12	7	9	14	14
Drive	6	-7	7	5	5	7	4	10	11
Taxi/Uber	2	-1	2	3	2	2	2	2	14

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	55	-3	57	53	45	66	59	42	57
Train	36	+18	38	34	41	31	26	69	36
Bus	15	-2	14	16	20	10	15	16	18
Drive	8	-5	11	6	8	9	7	13	4
Taxi/Uber	4	-2	2	6	4	4	4	2	18

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Knowledge of the area	79	0	79	79	80	78	85	72	32
Phone maps / apps	40	+8	41	38	39	40	34	48	82
Signage in the area	8	+3	12	5	10	7	6	16	14
Asked friends/family for directions	4	+1	3	6	3	6	4	5	4
Asked staff / officials for guidance	2	+1	2	2	1	2	1	3	7
Printed map / guide book	1	0	1	0	0	1	0	1	7
Tour guide	0	0	1	0	0	0	0	0	7

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28 – low base, results indicative only)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Recommendations through social media or friends/family were the key to finding out about things to do in the area

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Social media	67	+10	64	71	68	66	67	66	68
Recommended by friends, family or work colleagues	53	+9	54	53	48	58	55	46	54
Search engines	53	+5	56	48	54	51	52	53	64
Event websites	15	+2	13	17	11	19	16	10	14
Other websites	13	-2	15	11	14	12	14	9	14
City of Sydney website	9	+1	13	6	12	7	11	7	0
Newspapers	8	-1	10	5	8	7	7	10	4
Travel websites	6	-2	9	3	6	6	6	6	14
TV programmes	6	+1	9	4	6	7	7	4	7
Membership emails (e.g. Opera House)	6	+1	5	7	3	9	6	3	7
Radio	5	0	6	4	3	7	4	8	0
Tourist flyers	4	+2	5	3	2	7	5	3	4
Travel agents or tour guides	0	0	0	0	0	0	0	0	4

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28 – low base, results indicative only)
D1

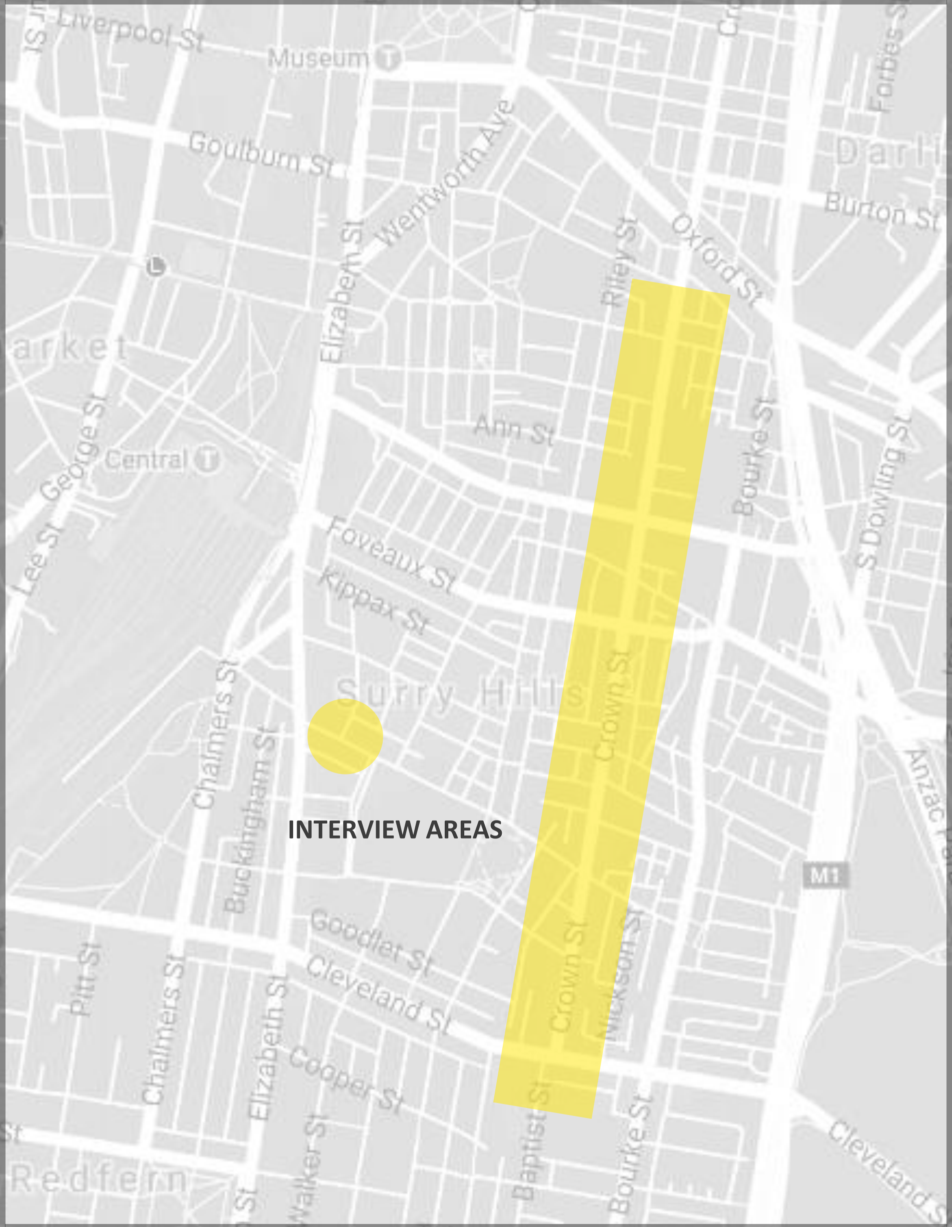
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

GLEBE AND SURROUNDS

REDFERN AND SURROUNDS

SURRY HILLS AND SURROUNDS

GREEN SQUARE AND SURROUNDS



Surry Hills and surrounds area

Surry Hills attracts an eclectic mix of visitors and Sydney locals

Surry Hills

Surry Hills attracts a range of visitors throughout the week… there were a broad mix of different visitors in the Surry Hills area throughout the week, with a relatively even gender mix (the proportion of females in the area was 5p.p. higher than the index across all other precincts). There was also a broad spread of people from different age groups and socioeconomic backgrounds

Younger people more likely to visit at night… attracted by a vibrant night life, half of visitors after 6pm were under the age of 30 years. Whilst in the day a greater proportion of older visitors are present – with 1 in 5 visitors over 50 years of age, double the proportion of night time visitors

Greater Sydney socialisers also more prevalent during the evenings… visitations by greater Sydney visitors peaked at close to 2 in 5 (38%) during 9pm to 12am on Saturdays when social or leisure purposes are more prominent. Interestingly, the next most common period for these visitors is during 6pm to 9pm on Wednesdays where they account for a third of visitors (36%), however this proportion falls significantly later into the evening amongst people in the area between 9pm to 12am (12%), suggesting the influence of weekday responsibilities on these visitors who live further away

Profile of visitors in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	53	-5	50	55	56	50
Female	47	+5	50	45	44	50
Under 30	45	-6	38	52	42	49
30-49	38	+3	40	36	37	39
50+	17	+3	22	11	21	13
Inner city	70	-4	73	67	69	71
Greater Sydney	23	+3	20	25	24	21
Domestic visitors	5	+1	5	4	5	4
International visitors	3	0	3	4	3	4
<$50K	29	-4	29	30	30	29
$50K to $100K	29	+1	27	31	33	25
$100K+	28	+3	30	27	25	32
Refused	13	0	14	12	13	14
Work in the immediate area	32	+3	36	28	34	30

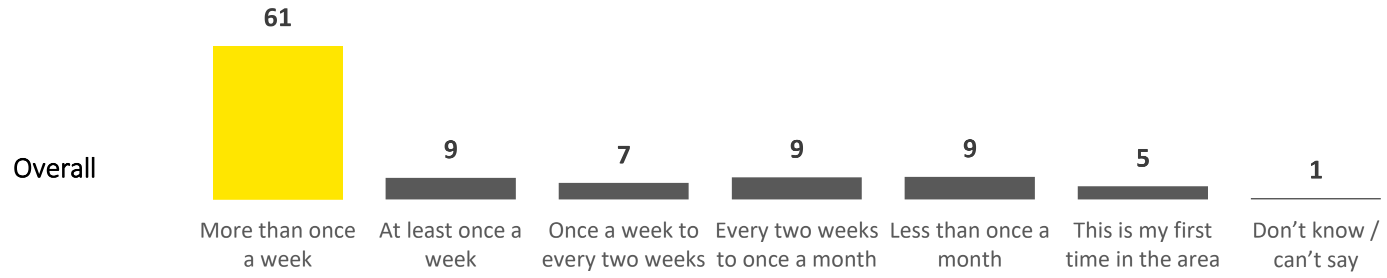
Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270).
Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The proportion who visit more than once per week was marginally higher than other precincts, largely a result of daytime visitors

Surry Hills

Visitation frequency (%)



	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Index (Diff)	+6	0	-3	-3	-1	+1	0
Day time	71	5	4	8	7	4	1
Night time	52	12	9	10	11	6	0
Wednesday	68	7	6	5	8	4	1
Saturday	55	10	7	12	10	6	0
Inner city	75	8	5	6	4	2	0
Greater Sydney	33	11	13	19	18	4	2
Domestic & international visitors	15	10	0	5	32	37	2

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, Greater Sydney=120, Domestic and International visitors=41)
Q2

Surry Hills plays different roles during the day and at night…

1 in 3
For social or leisure during the day to…

3 in 5
in the evening

1 in 5
Visit for shopping or business, respectively, during the day

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social and leisure activities are key attractions to the area, particularly on the weekends and at night

Surry Hills

Leisure activities the main reason for visiting the area… with half of visitors to Surry Hills and the surrounding area indicating they were there for this purpose (11p.p. higher than the index across all precincts) – significantly higher than other reasons, such as of passing through, business, and shopping which were mentioned by less than 1 in 5 visitors respectively

Strong differentiation in activities between day and night in Surry Hills… whilst social or leisure is consistently the leading reason for visiting, this was particularly high during nights and weekends. Alternatively, during the daytime there was a greater focus on doing business and shopping – highlighting potential to promote or extend shopping opportunities in to the evening

Daytime visitors more likely to be on their own… with 7 in 10 daytime visitors in the area by themselves. Along with this, daytime visitors were less likely to be engaged in social or leisure purposes and more likely to just be passing through, on business or shopping

Social offering more pronounced at night… with 6 in 10 night time visitors visiting for this purpose. These visitors were more likely to be accompanied by their friends, highlighting the strong social component of nightlife in the precinct

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Social / leisure	49	+11	35	63	38	60	48	54	39
Passing through	19	-5	22	15	22	16	22	10	17
Business	14	+4	20	9	19	10	11	23	20
Shopping	13	-7	22	4	11	14	14	8	10
Appointment	4	+2	6	3	6	2	3	7	5
Sightseeing	3	0	4	2	2	4	2	1	22
Catch public transport	3	-5	3	3	4	1	3	2	5

Company in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
On my own	56	-1	70	43	66	47	60	48	51
Friends	29	+6	14	43	18	40	27	36	24
Spouse / partner	9	-3	8	10	9	9	7	13	17
Other family members	3	0	4	3	2	5	3	3	10
Children (<15 years)	2	0	4	1	2	3	3	2	0
Work colleagues	2	0	2	2	3	1	2	1	5
Clients	0	0	1	0	1	0	0	1	2
Tour	0	0	0	0	0	0	0	0	0

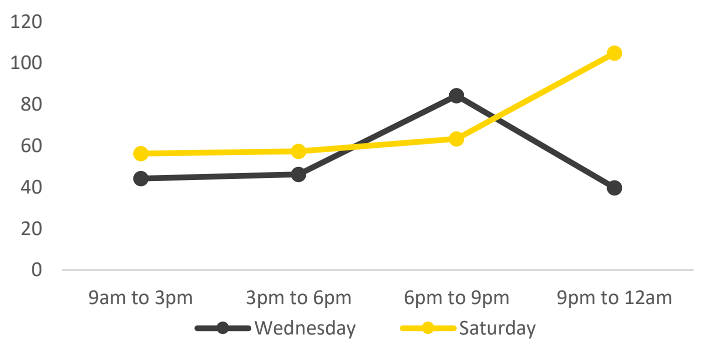
Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, *Greater Sydney=120, **Domestic and International visitors=41)
Q1, Q6

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

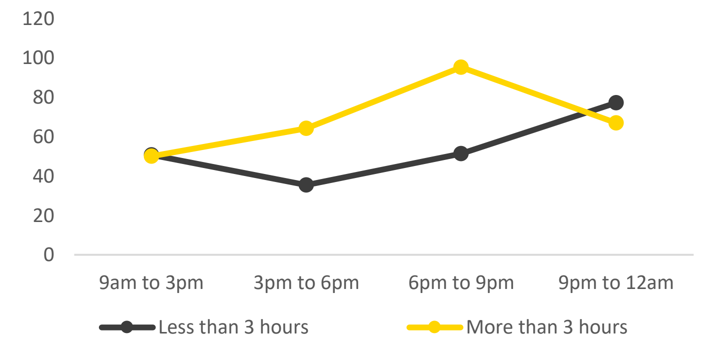
Indicative spend was substantially higher than the index, driven by night time activities

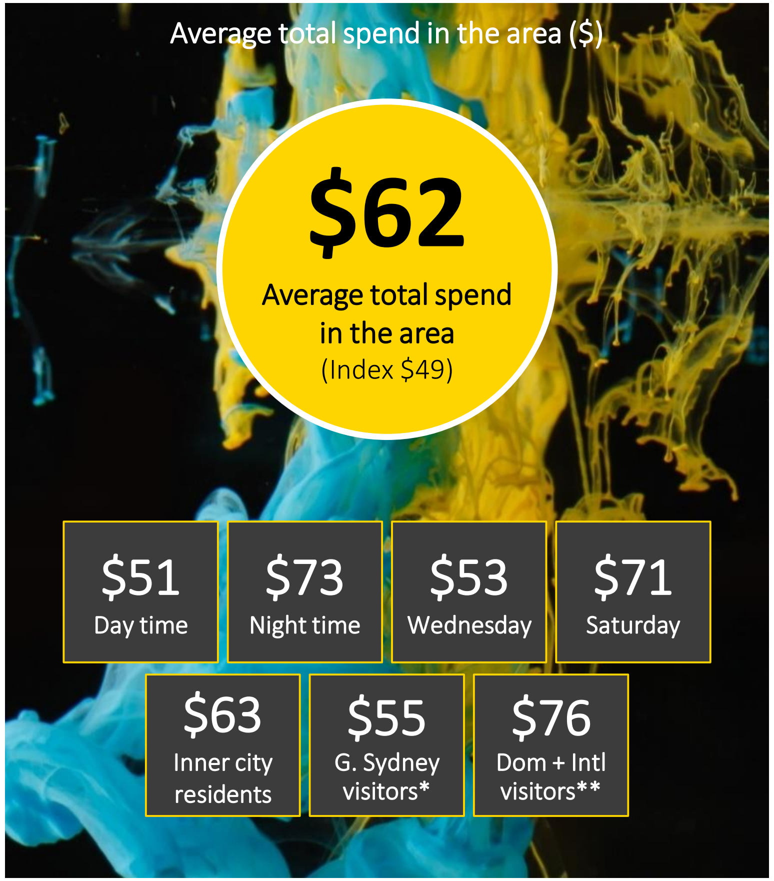
Surry Hills

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Time spent in the area ($)





Time of day a key factor behind spending behaviours… with visitors during the day spending an indicative $51 on average (compared to $73 in the evening). Lower spending outcomes throughout the day were largely a result of having a number of people just pass through the area ($48 on average). In contrast, day time visitors who were shopping had notably higher indicative spend ($77). Comparatively, night time social life related activities recorded higher spend e.g. those in the area for social or leisure purposes ($80)

Socialisers and shoppers recorded higher spend outcomes overall… for example visitors who visited a bar or pub had an indicative average spend of $92, while those who browsed or bought from shops had an indicative spend of $104. By comparison, those who bought a coffee or tea had lower indicative spend of $79

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, *Greater Sydney=120, **Domestic and International visitors=41). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

F&B a key attraction for Surry Hills, led by iconic restaurants, pubs and cafés featured along Crown St

Saturdays the peak for food and beverage… with visitors in the area on a Saturday significantly more likely to have food (73%) or drinks (56%) than people in the area on a weekday (56% and 45% respectively). This highlights the area's strong café and dining culture, but could also suggest an area for development during the week

Visitors less likely to undertake activities on weekdays as the day wears on… during the week people in the area engage in a range of activities during the day, particularly from 9am to 3pm – this included: food (64%), coffee/tea (61%), shopping (59%). This behaviour softens substantially throughout the day however

Males more likely to visit a bar/pub in the area… with half of male visitors in the area indicating this was part of their plans, compared to females where only 38% indicate their intention to visit a bar/pub whilst in Surry Hills or the surrounding areas

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Food	64	+11	68	60	56	73	63	69	56
Coffee/tea	51	+6	67	35	45	56	52	48	41
Bar/pub	44	+18	34	54	41	47	45	43	44
Shopping	34	-1	52	17	35	33	38	25	27
Event, business meeting or conference	17	+7	21	13	14	19	15	21	22
Show friends/relatives around	15	+2	15	15	13	17	17	14	0
Overnight stay	14	+6	18	11	17	12	15	4	37
Cultural attractions	14	+4	20	8	12	16	15	12	12

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, *Greater Sydney=120, **Domestic and International visitors=41)
Q3

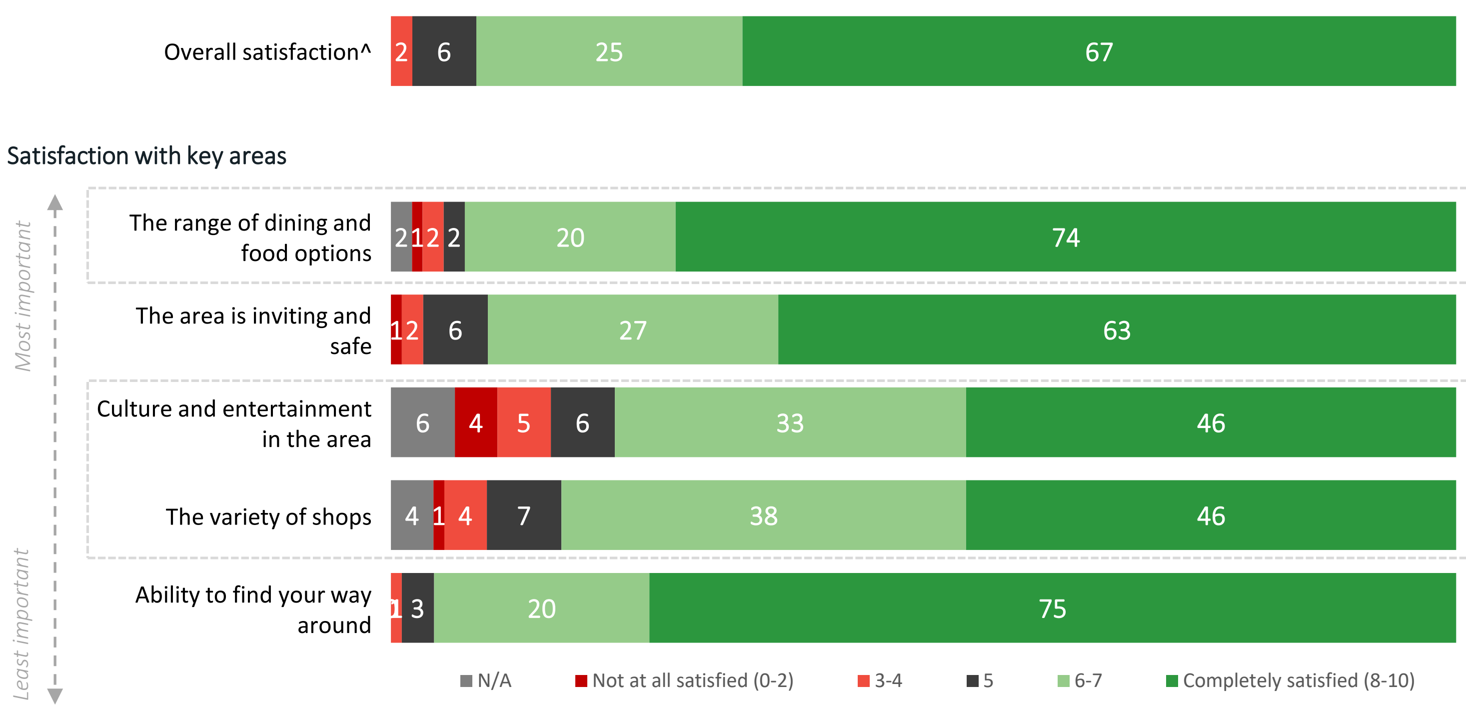
Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Overall, satisfaction was positive – particularly for F&B and cultural offerings in the area

Surry Hills

Satisfaction with key areas of the precinct experience (%)

Satisfaction with overall experience



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Overall satisfaction^	+2	69	66	67	68	68	68	61
The range of dining and food options	+19	77	70	70	77	75	71	73
The area is inviting and safe	+2	63	64	61	66	65	62	54
Culture and entertainment in the area	+12	45	47	40	51	48	46	32
The variety of shops	+8	49	43	46	46	48	41	39
Ability to find your way around	0	78	72	78	72	83	58	59

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, Greater Sydney=120, Domestic and International visitors=41)
Q11, Q12 ^N/A not asked for overall satisfaction

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Construction in the area a consideration for some

Construction the most commonly suggested area for improvement… at the time of interviewing (Oct 2017) construction work in the Surry Hills area for the Sydney Light Rail network was disrupting visitors, particularly amongst local Sydneysiders (21%) who were more likely to be regular visitors and frequent the area multiple times a week

Shopping, entertainment and cultural offerings also suggested for improvement… with close to 1 in 5 visitors to the area citing this as an opportunity to improve the visitor experience, particularly amongst weekday visitors. With that in mind, the focus on this area was comparatively low compared to other precincts, 9p.p. below the index

Wayfinding a greater concern for domestic and international visitors… with 15% suggesting better signage or wayfinding could improve their experience – three-times more likely to be suggested by these visitors than locals (5%)

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Construction completion	20	+9	21	19	21	19	21	20	7
Wider range and availability of shops	19	-9	19	18	24	14	19	21	15
Improved entertainment & cultural offerings	17	-2	14	20	18	15	17	14	20
More parking available	13	+2	12	14	13	13	12	17	15
Better value for money/cheaper	13	+5	6	19	13	12	12	13	17
More food options	11	-8	8	14	14	9	11	13	7
More bars/beverage options	11	0	5	17	13	9	13	8	2
Improved transportation to/from	10	-1	11	9	10	10	10	11	5
More parks/green areas	10	+1	10	10	11	9	11	8	7
Improved security/safety	9	0	10	8	11	7	9	9	5
Improved cleanliness	8	+1	6	10	8	8	9	7	5
Better signage/wayfinding	6	+2	6	6	8	4	4	10	15

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, Greater Sydney=120, Domestic and International visitors=41)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Walking is the most common method of transportation to or from Surry Hills, potentially driven by proximity to major rail and bus interchanges

Surry Hills

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	62	+1	68	56	63	60	73	28	51
Bus	17	+1	16	18	18	16	15	26	15
Train	17	-4	15	18	15	19	9	43	10
Drive	11	-2	12	10	12	11	8	23	10
Taxi/Uber	7	+3	3	11	6	9	6	6	17

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	58	0	68	49	60	56	69	28	46
Train	18	0	16	19	16	20	10	43	7
Bus	15	-2	14	16	14	16	12	24	17
Drive	12	-1	13	11	13	11	8	25	7
Taxi/Uber	11	+5	4	17	8	13	11	6	20

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Knowledge of the area	77	-2	76	77	79	74	86	61	37
Phone maps / apps	31	-1	31	31	27	34	20	50	71
Signage in the area	5	-1	5	4	6	3	2	8	17
Asked friends/family for directions	2	-1	2	3	2	3	2	3	2
Printed map / guide book	1	0	0	2	2	0	0	2	10
Asked staff / officials for guidance	1	0	1	1	2	0	1	2	2
Tour guide	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, Greater Sydney=120, Domestic and International visitors=41)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social media and recommendations are crucial for people when finding things to do in the area

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Social media	57	0	56	58	49	65	57	60	51
Recommended by friends, family or work colleagues	46	+2	44	49	49	44	47	49	29
Search engines	46	-2	41	50	48	44	46	43	51
Other websites	19	+4	25	14	20	19	20	17	24
Event websites	12	-1	12	13	12	13	13	11	10
Newspapers	12	+4	17	7	17	7	13	11	10
Travel websites	10	+1	8	11	11	8	7	13	20
City of Sydney website	9	0	10	8	11	6	8	9	12
TV programmes	8	+2	11	5	8	7	8	8	2
Radio	6	+1	6	6	5	7	6	6	5
Membership emails (e.g. Opera House)	5	0	6	3	7	2	5	4	5
Tourist flyers	2	0	2	3	2	3	2	1	10
Travel agents or tour guides	1	0	0	1	1	0	0	0	7

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, Greater Sydney=120, Domestic and International visitors=41)
D1

EY Sweeney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

GLEBE AND SURROUNDS

REDFERN AND SURROUNDS

SURRY HILLS AND SURROUNDS

GREEN SQUARE AND SURROUNDS

Green Square and surrounds area

Green Square is a hub for younger people, particularly in the evenings

Green Square

In the evenings, Green Square area skewed heavily towards younger people… overall, Green Square is a relatively young area – with the proportion of people in the area under the age of 30, 8p.p. higher than the average across all additional precincts. This skew was driven largely as a result of evening activities, with the proportion increasing significantly from 50%, during the day, to 68% after 6pm. In contrast, 14% of people in the area during the day were aged 50+, this decreased significantly to 6% after 6pm

Weekends more likely to attract visitors from across the city… with the proportion of greater Sydney residents increasing significantly from 13% during the week, to almost 1 in 4 on Saturdays. Interestingly, international visitors decreased from 7% during the week to only 2% on the weekends

Visitation frequency significantly higher amongst locals… with 8 in 10 inner city residents indicating they visit Green Square more than once a week. Visitation frequency was also very high amongst visitors to the area, with around half of Greater Sydney residents and around 1 in 3 domestic/international visitors visiting Green Square more than once a week. This is the highest proportion of any precinct tested in either wave of research. Going forward, it may be interesting to look at additional research with these visitors to understand the drivers behind their visitation outcomes

Profile of visitors in the precinct (%)

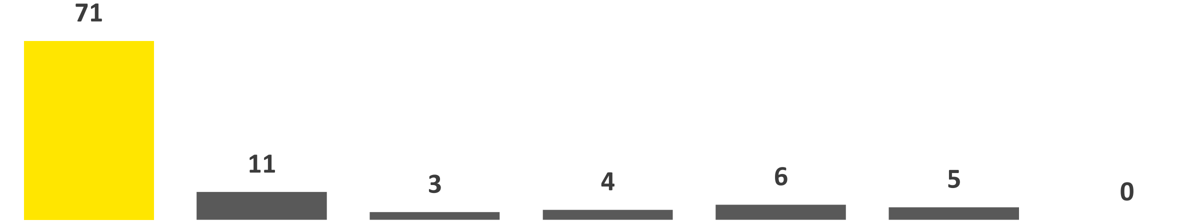
	Overall	Index (Diff)	Day	Night	Wed	Sat
Male	62	+4	62	62	61	63
Female	38	-4	38	38	39	37
Under 30	59	+8	50	68	59	59
30-49	31	-4	36	26	31	31
50+	10	-4	14	6	10	10
Inner city	74	0	75	73	77	70
Greater Sydney	18	-1	18	19	13	23
Domestic visitors	3	0	3	3	3	4
International visitors	5	+1	4	5	7	2
<$50K	30	-3	28	33	25	35
$50K to $100K	30	+2	34	26	30	29
$100K+	29	+3	29	28	33	25
Refused	11	-2	9	13	12	11
Work in the immediate area	26	-3	25	27	26	26

Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260). Note: household income asked for residents in Australia only
S2, S3, S5, S6, D2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Visitation frequency heavily skewed towards regulars in the area more than once a week

Visitation frequency (%)

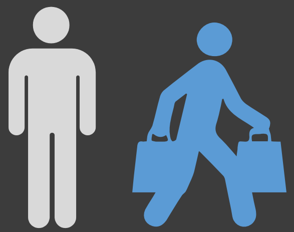


	More than once a week	At least once a week	Once a week to every two weeks	Every two weeks to once a month	Less than once a month	This is my first time in the area	Don't know / can't say
Overall	71	11	3	4	6	5	0
Index (Diff)	-4	-2	+1	+2	+2	+1	0
Day time	68	12	3	4	8	5	0
Night time	75	10	4	4	3	5	0
Wednesday	74	9	3	5	4	5	0
Saturday	68	12	4	3	7	5	0
Inner city	79	10	4	2	3	2	0
Greater Sydney	56	17	1	8	13	5	0
Domestic & international visitors	36	2	0	14	17	31	0

Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, Greater Sydney=95, Domestic and International visitors=42)
Q2

Green Square acts as a shopping destination for many visitors…

2 in 5
mentioned shopping as the main purpose for their visit



Around 1 in 2
had shopped whilst in the area

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Shopping is a key attraction of Green Square for inner city residents

Green Square

Shopping prevalent across both day and night time visitors… the most commonly cited purpose for being in the area, particularly during the evening. The established East Village Shopping Centre along with the recent introductions of a major supermarket chain to the area contributing to these outcomes

Social and leisure a consistent drawcard… with these activities the main purpose for 1 in 4 people in the area during both the day and night. These visitors dine while in the area – with 2 in 3 enjoying the dining options available, and around 3 in 5 having beverages. Half of these visitors were accompanied by their friends during their time in the area

Shopping activities undertaken on their own… whilst commonly a social activity, 3 in 5 visitors to the area shop by themselves – this is particularly the case for weekday visitors (66%) compared to the weekend (51%). This suggests visits were part of regular routines rather than casual social occasions, and they were also more likely to be inner city locals (84%)

Green Square visitors more likely to be with a spouse or partner… with 17% accompanied by their significant other – 5p.p. higher than the index across all precincts

Main reasons for visiting (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Shopping	38	+18	34	42	37	39	43	14	43
Social / leisure	28	-10	27	28	22	33	21	51	38
Passing through	12	-11	12	12	13	10	13	9	7
Business	9	-2	11	6	7	10	6	20	7
Sightseeing	3	0	2	3	3	3	1	4	12
Catch public transport	2	-6	2	2	2	2	1	4	5
Appointment	2	-1	2	1	2	2	2	1	2

Company in the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
On my own	51	-7	54	48	56	45	55	39	36
Friends	23	-1	16	29	19	27	18	37	33
Spouse / partner	17	+5	17	18	14	21	19	11	19
Other family members	5	+1	5	5	4	5	4	5	12
Work colleagues	3	+1	4	2	3	3	3	6	0
Children (<15 years)	3	0	5	1	4	2	3	4	0
Clients	0	0	0	0	0	0	0	0	0
Tour	0	0	0	0	0	0	0	0	0

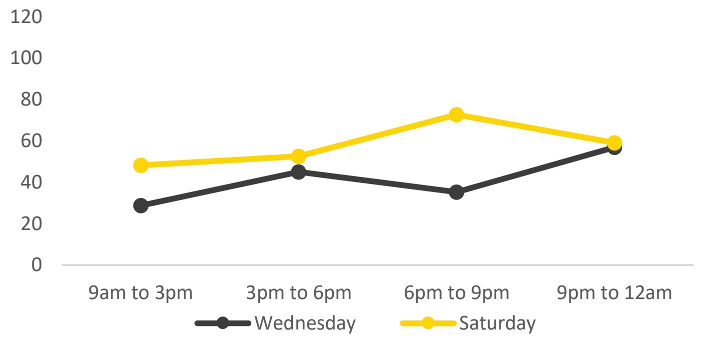
Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, *Greater Sydney=95, **Domestic and International visitors=42)
Q1, Q6

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

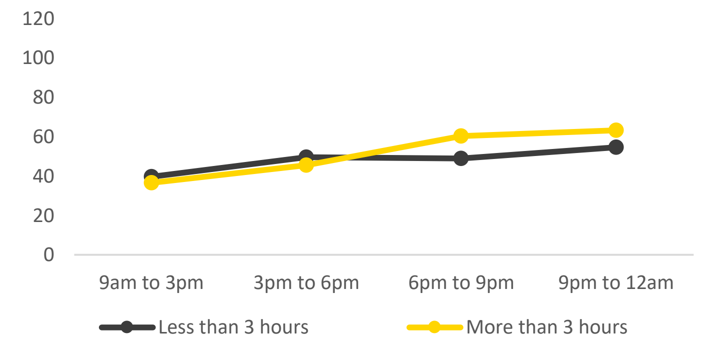
Average indicative spend driven by visitors in the area on the weekend

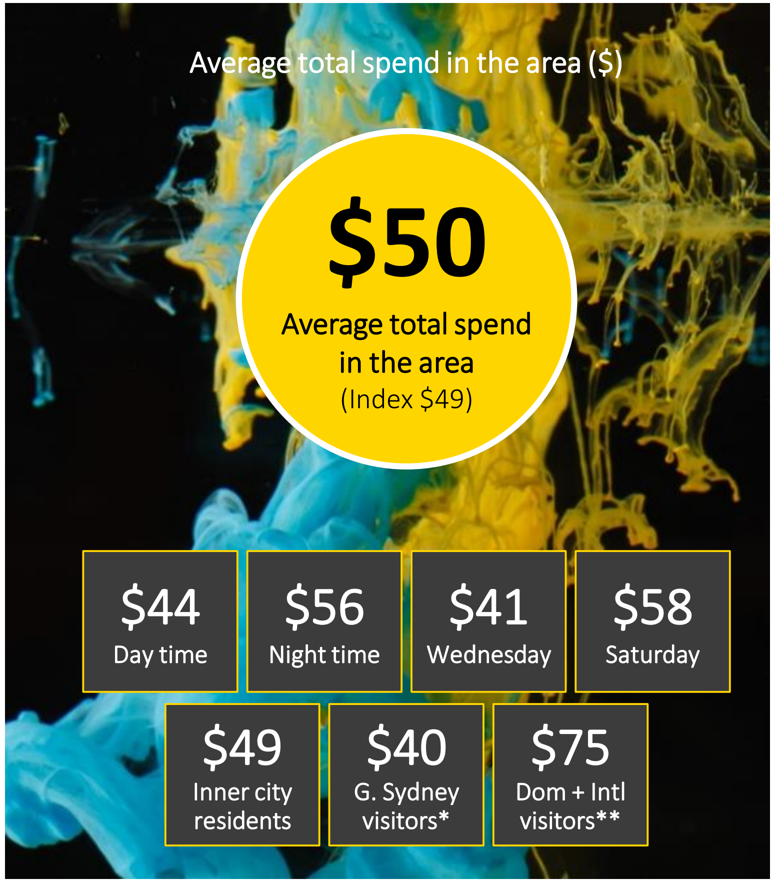
Green Square

Average total spend in the area by time of day – Day of week ($)



Average total spend in the area by time of day – Time spent in the area ($)





Spending highest on the weekends… with an average total spend of $58 on Saturdays compared to $41 on Wednesdays

Social activities translated in to higher indicative spend… for example people who visited a bar or pub were more likely to record higher indicative spend ($86) compared to people who bought coffee or tea in the area ($49). Visitors who were accompanied by family were also more likely to spend more. For example, people with their partner, children or other family members recorded an average indicative spend of $64, by comparison those who were on their own ($44) or with friends ($53) recorded lower indicative spend levels overall

Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, *Greater Sydney=95, **Domestic and International visitors=42). Note: where indicative spend was >$1,500, these figures have been removed from the analysis
Q8, Q10

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Shopping a key differentiator for people in the Green Square area

Green Square

Visitors more likely to be shopping in Green Square compared to other precincts… with almost half of all visitors going shopping in the area – 12p.p. higher than the average across all precincts. Interestingly, this was consistent across both the day and the evening – reflecting the availability of the shopping centre during the day and a major supermarket chain in the area facilitating grocery shopping both during the day and at night

Coffee/tea also more prevalent in the Green Square town centre… with half of the people in the precinct engaging in this activity, and peaking during 9am to 3pm on weekdays where 4 in 5 visitors in the area enjoy a cup. This was higher than daytime Saturday visitors, where two-thirds of visitors had a cup of tea/coffee during 9am to 3pm (67% compared to 82% on weekdays)

Activities in the area (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom / Intl**
Food	53	0	54	52	59	48	50	62	69
Coffee/tea	50	+6	61	39	57	43	49	56	48
Shopping	46	+12	44	48	45	48	48	39	48
Show friends/relatives around	18	+5	15	21	24	11	17	16	24
Bar/pub	16	-10	14	19	19	13	18	11	17
Overnight stay	11	+2	9	13	19	3	12	2	21
Event, business meeting or conference	5	-5	5	6	6	4	5	4	5
Cultural attractions	4	-5	5	3	7	2	4	3	5

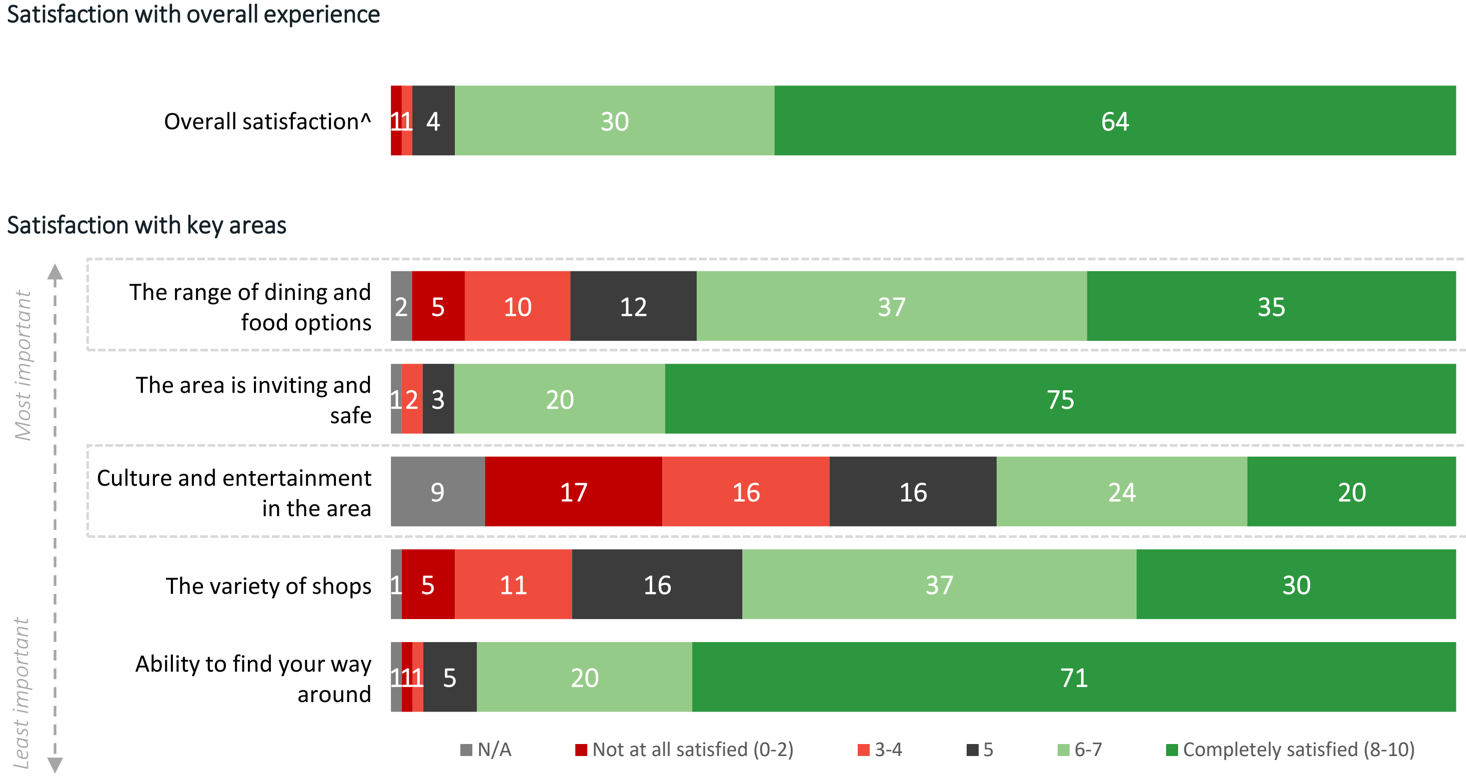
Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, *Greater Sydney=95, **Domestic and International visitors=42)
Q3

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Green Square seen to be a highly safe area, but F&B and culture could be optimised

Green Square

Satisfaction with key areas of the precinct experience (%)



% Completely satisfied (8-10 out of 10)

	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Overall satisfaction^	-1	62	67	63	66	64	67	62
The range of dining and food options	-20	32	37	36	34	32	44	36
The area is inviting and safe	+14	75	75	77	72	75	68	88
Culture and entertainment in the area	-14	18	22	23	17	19	26	14
The variety of shops	-8	26	33	30	30	26	39	40
Ability to find your way around	-4	69	74	74	69	73	68	62

Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, *Greater Sydney=95, **Domestic and International visitors=42)
Q11, Q12 ^N/A not asked for overall satisfaction

EY Sweeney

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

The range and availability of shops, food options and cultural offerings were seen to be key focal points for improvement

Green Square

Shopping the most highly cited suggestion for improving the area… while shopping was the main reason for visiting, many suggested this as an area for improving experiences in the precinct with 2 in 5 visitors suggesting this change (15p.p. higher than the index across all precincts)

F&B and culture also seen to be key building areas as well… with 1 in 3 suggesting more food options (13p.p. higher than the index across both precincts) and 1 in 4 suggesting that improved entertainment and cultural offerings (6p.p.) are key opportunities for developing the area

Suggestions for improving the precinct experience (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Wider range and availability of shops	43	+15	40	47	45	42	45	31	55
More food options	32	+13	32	31	33	30	35	18	33
Improved entertainment & cultural offerings	25	+6	24	27	26	25	29	17	10
Construction completion	17	+7	22	13	13	22	21	7	7
More bars/beverage options	15	+4	12	17	16	13	16	9	14
Improved transportation to/from	11	+1	14	8	13	10	11	13	10
More parking available	11	-1	15	6	10	11	11	11	2
More parks/green areas	8	-1	9	8	8	9	9	5	10
Better value for money/cheaper	5	-3	6	5	5	5	6	5	2
Improved security/safety	3	-6	2	4	3	3	3	3	0
Improved cleanliness	3	-4	4	2	3	3	4	0	2
Better signage/wayfinding	3	-1	5	2	2	4	2	6	2

Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, *Greater Sydney=95, **Domestic and International visitors=42)
Q15

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

People are familiar with the area, with 4 in 5 saying they used their knowledge of the area to find their way around

Green Square

Transportation to the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	59	-1	54	64	59	60	66	33	57
Drive	20	+7	26	14	14	26	15	39	19
Train	14	-7	17	10	16	11	10	25	21
Bus	11	-5	10	11	13	9	8	21	10
Cycle	4	+2	3	5	4	3	5	2	0

Transportation from the precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Walk	59	+1	56	63	60	58	66	31	57
Drive	20	+7	27	14	15	25	15	39	24
Train	11	-6	15	8	12	11	7	25	19
Bus	11	-7	12	10	12	10	8	22	7
Cycle	4	+2	2	5	4	3	4	2	0

Navigation of the area whilst in precinct (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Knowledge of the area	80	+2	76	84	79	82	88	63	50
Phone maps / apps	24	-8	26	21	22	25	18	40	38
Asked friends/family for directions	5	+1	5	5	6	4	2	9	19
Signage in the area	3	-2	3	3	2	4	2	4	10
Asked staff / officials for guidance	1	0	1	1	0	1	0	2	2
Printed map / guide book	0	0	0	0	1	0	0	0	2
Tour guide	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, *Greater Sydney=95, **Domestic and International visitors=42)
Q4, Q5, Q14

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Social media and online searches the main methods of finding out about things to do in Green Square

Methods of finding out about things to do (%)

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner city	G. Syd*	Dom + Intl**
Social media	49	-8	49	48	49	49	50	49	40
Search engines	47	-1	44	49	44	50	46	46	50
Recommended by friends, family or work colleagues	37	-7	38	37	37	38	37	38	43
Other websites	14	-1	14	15	18	11	16	8	14
Event websites	9	-4	11	8	9	10	10	8	0
Travel websites	7	-1	6	9	8	7	8	7	5
City of Sydney website	7	-1	10	5	7	8	9	4	2
Newspapers	5	-3	7	3	4	6	6	3	2
Radio	5	0	5	4	5	5	6	0	2
Membership emails (e.g. Opera House)	4	-1	5	3	6	2	5	0	2
TV programmes	3	-3	3	2	4	1	2	4	2
Tourist flyers	1	-2	1	1	1	1	0	1	7
Travel agents or tour guides	0	0	0	0	0	0	0	0	0

Base: respondents interviewed in the Green Square area, n=522 (Index=2,119, Day=259, Night=263, Wednesday=262, Saturday=260, Inner city=385, *Greater Sydney=95, **Domestic and International visitors=42)
D1

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Key findings for business

This section includes key business findings from the seven initial precincts surveyed in June 2017.

Thought starters for businesses in the City of Sydney…

1. Shopping, F&B and entertainment offerings consistently seen to be potential optimisation points

Across most precincts and visitor groups, these three areas were seen to have the greatest potential to improve visitor experiences (particularly amongst inner city residents). The proportion who would like to see more shops open, and entertainment offerings available also increased marginally after 6pm, potentially suggesting that businesses could consider extending their operating hours across the city. However, businesses will need to carefully consider the costs/benefits associated with extending operating hours to understand if a positive return on investment could be achieved

Consider undertaking pilots in key areas of the city to better understand if extended trading hours has a positive net effect for businesses, the precincts in general and visitor experiences

2. An integrated but diverse online presence may provide the most cost-effective direct-line to consumers

When asked what methods they use to find out about things to do in Sydney, three-quarters said they use online channels – highlighting the critical value of maintaining a well-established online presence. With that in mind, different visitor groups utilise a range of online channels. For example, more than half of Sydney residents use social media, while only 1 in 3 domestic or international visitors do so. In contrast, 2 in 5 international visitors use search engines and 3 in 10 use travel websites (significantly higher than other visitors types)

Consider offering tips to local businesses to help them improve their online and social media presence – also determine whether COS can further promote precincts and activities online to raise awareness and footfall

3. Critical to leverage recommendations by offering great visitor experiences

Along with online channels, word-of-mouth is a critical channel for businesses to consider – with half indicating recommendations are a key way of finding out about things to do in Sydney (this was relatively consistent across all visitor types).

To build recommendations, it is critical to provide visitors/consumers with exceptional experiences. From a precinct perspective, maintaining already positive wayfinding strategies and a feeling of safety are critical. At a business level, delivering compelling and interesting offers to consumers as well as driving cultural experiences is also important

Consider innovative and cost-effective methods for building the cultural feel of different areas (e.g. entertainment, community events, etc.) and also cost effectively promoting activities to encourage attendance

Appendices

Precinct questionnaire

SECTION 1: SHIFT INFORMATION

HQ – indicates a hidden question (i.e. not shown to respondents)

HQ6.	**INTERVIEWER TO COMPLETE AT START OF SURVEY – PRECINCT**	CBD north area (For example, the area north of Hunter Street to Circular Quay through to The Rocks) O 01
		CBD centre area (For example, the area south of Hunter Street to Park Street and west to King Street wharf - including Wynyard and King St Wharf) O 02
		CBD south area (For example, the area south of Park Street to Hay Street & Haymarket - including Town Hall and World Square) O 03
		Potts Point area (For example, the Kings Cross area and surrounds) O 04
		Oxford St and surrounds area O 05
		Newtown and surrounds area O 06
		Pyrmont and surrounds area O 07
		Glebe and surrounds area O 08
		Redfern and surrounds area O 09
		Surry Hills and surrounds area O 10
		Green Square and surrounds area O 11
HQ7.	**RECORD AUTOMATICALLY – LOCATION WITHIN PRECINCT** ***CAN BE UPDATED IF RELOCATE***	
HQ8.	**RECORD AUTOMATICALLY – DAY OF INTERVIEW**	Wednesday O 01
		Saturday O 02
HQ9.	**RECORD AUTOMATICALLY – PRECODE DATE OF INTERVIEW** **FORMAT: DD/MM/YYYY**	

SECTION 2: INTERVIEW INFORMATION

TERMINATE AT END OF SCREENER

S1.	**RECORD AUTOMATICALLY – PRECODE TIME OF INTERVIEW** **FORMAT: HH:MM:SS**	
S2.	**INTERVIEWER TO COMPLETE - RECORD GENDER**	Male O 01
		Female O 02
S3.	Can you please tell me the location of your main residence? **Please select one response only.** **INTERVIEWER: DO NOT READ OUT**	In the inner city area O 00
		In the greater Sydney area O 01
		In NSW, outside of Sydney O 02
		In another Australian state O 03
		Outside of Australia O 04
		I'd prefer not to answer **TERMINATE** O 99
S4.	**ASK IF S3=0-3** Can you tell me the postcode of your main address? **INTERVIEWER: TYPE IN**	I don't know my postcode O 99

Precinct questionnaire

S5. Approximately, how old are you? **Please select one response only.** **INTERVIEWER: PROMPT IF NECESSARY**	Under 15 years of age **TERMINATE** O 01 15-19 O 02 20-29 O 03 30-39 O 04 40-49 O 05 50-59 O 06 60-69 O 07 70-79 O 08 80 or older O 09 Refused **TERMINATE** O 99
S6. Do you work in the **[INSERT HQ1]**? **Please select one response only.**	Yes ☐ 01 No ☐ 02 Don't know/unsure ☐ 03

SECTION 3: REASONS FOR VISIT	
Q1. Can you tell me the main reason you are visiting here today/tonight? **Please select all that apply.** **INTERVIEWER: PROMPT IF NECESSARY**	Just passing through on your way to another location ☐ 01 Here to catch public transport ☐ 02 Here for social or leisure purposes (e.g. entertainment, tourism, eating, coffee, shopping, etc.) ☐ 03 Here doing shopping ☐ 04 Just doing some sightseeing ☐ 05 Here for an appointment (e.g. a medical appointment) ☐ 06 Here for business purposes (e.g. conference) ☐ 07 Other ☐ 98 Don't know/prefer not to say O 99
Q2. How often do you visit the **[INSERT HQ1]**? **Please select one response only.** **INTERVIEWER: DO NOT PROMPT**	This is my first time in the area O 00 More than once a week O 01 At least once a week O 02 Between once a week and every two weeks O 03 Every two weeks to once a month O 04 Less than once a month O 05 Don't know/can't say O 99
Q3. Have you done, or are you planning to do any of the following while you are here? **Please select all that apply.** **INTERVIEWER: READ OUT**	Buy/drink coffee or tea ☐ 01 Buy food from a restaurant or café in the area ☐ 02 Visit a bar or pub ☐ 03 Show friends or relatives around the area ☐ 04 Stay overnight in the precinct (e.g. hotel, AirBNB, etc.) ☐ 05 Browse or buy from shops (e.g. for clothes, souvenirs) ☐ 06 Attended an event, business meeting or conference ☐ 07 Viewed/listened to cultural attractions in the area (e.g. live music, performances, etc.) ☐ 08 None of these O 99

Precinct questionnaire

Q4.	How did you get to the area today/tonight? **Please select all that apply.** **INTERVIEWER: PROMPT IF REQUIRED /SHOW LIST ON TABLET**	Walked	☐ 01
		Cycled	☐ 02
		Arrived via car (not taxi, Uber or other commercial car)	☐ 03
		Taxi	☐ 04
		Uber – or other ride sharing service	☐ 05
		Motorbike	☐ 06
		Bus	☐ 07
		Train	☐ 08
		Light rail	☐ 09
		Ferry	☐ 10
		Other	☐ 90
		I can't remember	☐ 98
		Refuse	○ 99

Q5.	And how will you leave the area today/tonight? **Please select all that apply.** **INTERVIEWER: PROMPT IF REQUIRED /SHOW LIST ON TABLET**	Walk	☐ 01
		Cycle	☐ 02
		Via car (not taxi, Uber or other commercial car)	☐ 03
		Taxi	☐ 04
		Uber – or other ride sharing service	☐ 05
		Motorbike	☐ 06
		Bus	☐ 07
		Train	☐ 08
		Light rail	☐ 09
		Ferry	☐ 10
		Other	☐ 90
		I can't remember	☐ 98
		Refuse	○ 99

Q6.	Who are you here with today/tonight? **Please select all that apply.** **INTERVIEWER: PROMPT IF NECESSARY** **PROGRAMMER: Ensure code 00 "On my own" is exclusive**	I am here on my own	○ 01
		With a spouse or partner	☐ 02
		With children (14 years or younger)	☐ 03
		Here with other family members	☐ 04
		With friends	☐ 05
		With a tour/tour group	☐ 06
		With clients	☐ 07
		With work colleagues	☐ 08

Q7.	Approximately how long will you spend in the area today/tonight? **Please select one response only.** **INTERVIEWER: DO NOT PROMPT**	0-less than 1 hour	○ 01
		1-less than 2 hours	○ 02
		2-less than 3 hours	○ 03
		3-less than 4 hours	○ 04
		4-less than 5 hours	○ 05
		5-less than 6 hours	○ 06
		6+ hours	○ 07
		Don't know	○ 99

Precinct questionnaire

SECTION 4: SPEND	
Q8. How much have you spent while in the area today/tonight (in Australian dollars)? **INTERVIEWER: RECORD AMOUNT IN WHOLE AUSTRALIAN DOLLARS, IF NOTHING, RECORD $0**	$ Refused O 99
ASK IF Q8 NOT REFUSED Q9. Is that the total amount you intend to spend in the area today? **Please select one response only.** **INTERVIEWER: DO NOT PROMPT**	Yes O 01 No O 02 Unsure O 99
ASK IF Q9=2 Q10. How much more do you think you will spend in the area today/tonight? **INTERVIEWER: RECORD AMOUNT IN WHOLE AUSTRALIAN DOLLARS, IF NOTHING, RECORD $0**	$

SECTION 5: SATISFACTION WITH VISIT		
Q11. On a scale of 0 to 10, how would you rate your experience in the area today/tonight where '0' means not at all satisfied and '10' means extremely satisfied? **Please select one response only.**	0 – Not at all satisfied	O 00
	1	O 01
	2	O 02
	3	O 03
	4	O 04
	5	O 05
	6	O 06
	7	O 07
	8	O 08
	9	O 09
	10 – Extremely satisfied	O 10

Q12. Using the same scale, where '0' means not at all satisfied and '10' means extremely satisfied, how would you rate the area on the following 8 statements?

INTERVIEWER: READ OUT EACH ASPECT TO RESPONDENT

RANDOMISE CODES	**Not at all satisfied**										**Completely satisfied**	**N/A**
1. The range of dining and food options	O 00	O 01	O02	O 03	O 04	O 05	O 06	O 07	O 08	O 09	O 10	O 11
2. The variety of shops	O 00	O 01	O02	O 03	O 04	O 05	O 06	O 07	O 08	O 09	O 10	O 11
3. The area is inviting and safe	O 00	O 01	O02	O 03	O 04	O 05	O 06	O 07	O 08	O 09	O 10	O 11
4. Ability to find your way around	O 00	O 01	O02	O 03	O 04	O 05	O 06	O 07	O 08	O 09	O 10	O 11
5. Culture and entertainment in the area (e.g. musical entertainment, performances, etc.)	O 00	O 01	O02	O 03	O 04	O 05	O 06	O 07	O 08	O 09	O 10	O 11

Precinct questionnaire

Q13. ASK IF Q12_4 (SAFETY)=0-4 Can you tell me why the area does not feel inviting and safe? **Please select all that apply.** **RANDOMISE CODES. ANCHOR CODES 1 AND 2** **INTERVIEWER: DO NOT PROMPT**		
	Generally unsafe **[PROBE FURTHER]**	☐ 01
	Too scary **[PROBE FURTHER]**	☐ 02
	Not enough lighting	☐ 03
	Not enough police/security guards	☐ 04
	Too many scary/drunken people	☐ 05
	Poor atmosphere	☐ 06
	Too crowded	☐ 07
	Limited public transport/transport feels unsafe	☐ 08
	Very few taxis in the area	☐ 09
	Hard to navigate the area (i.e. poor signage and directions)	☐ 10
	Other	☐ 90
	None of these / Don't know	○ 99

Q14. How have you found your way around the city today/tonight? **Please select all that apply.** **INTERVIEWER: DO NOT PROMPT**		
	Used my own knowledge of the area	☐ 01
	Maps on my phone (or other wayfinding apps)	☐ 02
	Used signage in the area	☐ 03
	Asked staff at a shop or official persons for guidance	☐ 04
	Asked friends/family for directions	☐ 05
	Used a printed map of the area/guide book	☐ 06
	Used a tour guide	☐ 07
	Other	☐ 98
	None of these / Don't know	○ 99

Q15. What, if anything, would have made your visit to the area more enjoyable today/tonight? **Please select all that apply.** **INTERVIEWER: DO NOT READ OUT**		
	Wider range of shops	☐ 01
	More shops open	☐ 02
	Improved entertainment or cultural offerings (e.g. musical entertainment, performances, etc.)	☐ 03
	More food options in the area	☐ 04
	More bars/beverage options in the area	☐ 05
	Improved security/safety	☐ 06
	Better signage/wayfinding	☐ 07
	Better/more frequent transport options to and from the area	☐ 08
	Better value for money (make things cheaper)	☐ 09
	Construction completion	☐ 10
	More parks/green areas	☐ 11
	Improved cleanliness	☐ 12
	More parking available	☐ 13
	Other	☐ 98
	None of these / Don't know	○ 99

Precinct questionnaire

SECTION 6: CLASSIFICATION		
ASK IF S3=3 OR 4 (DOMESTIC/INTERNATIONAL VISITORS) D1. **[ASK IF S3=2-4 DOMESTIC/ INTERNATIONAL VISITORS]** What channels/media did you or do you use to find out things to do while you are in Sydney? **[ASK IF S3=0-2 SYDNEYSIDERS]** What channels/media do you use to find out about things to do in Sydney? **Please select all that apply.** **INTERVIEWER: PROMPT IF NECESSARY**	Recommendations from friends, family or work colleagues	☐ 01
	Newspapers	☐ 02
	IF S3=2-4 Travel agents or tour guides	☐ 03
	Travel websites (e.g. trip advisor)	☐ 04
	Other websites	☐ 05
	Search engines (e.g. Google)	☐ 13
	City of Sydney website	☐ 06
	Event websites (e.g. whatsonsydney, sydney.com etc.)	☐ 07
	Membership emails (e.g. Opera House)	☐ 08
	Social media	☐ 09
	TV programmes	☐ 10
	Tourist flyers	☐ 11
	Radio	☐ 12
	Other	☐ 90
	None of these / Don't know	○ 99
ASK IF RESPONDENT LIVES IN AUSTRALIA D1. What is your approximate total household income before tax? **Please select one response only.** **INTERVIEWER: PROMPT IF NECESSARY**	Less than $25,000 (<$480 per week)	○ 01
	$25,000-$34,999 ($480 to <$675 per week)	○ 02
	$35,000-$49,999 ($675 to <$960 per week)	○ 03
	$50,000-$74,999 ($960 to <$1,450 per week)	○ 04
	$75,000-$99,999 ($1,450 to <$1,925 per week)	○ 05
	$100,000-$149,999 ($1,925 to <$2,885 per week)	○ 06
	$150,000 - $199,999 (2,885 to <$3,850 per week)	○ 07
	$200,000 or more (3,850 per week or more)	○ 08
	Refused	○ 09
D2. Thank you for your time. Just to remind you my name is **[NAME]** from EY Sweeney. If you have any questions about this research you can telephone our office on 1800 35 77 39.		

April to June 2017

Northern CBD, Central CBD, Southern CBD, Potts Point, Oxford St, Newtown, and Pyrmont

Sample profile

PRECINCTS																
	TOTAL		Northern CBD		Central CBD		Southern CBD		Potts Point		Oxford St		Newtown		Pyrmont	
	n=	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%
Total	***3741***	**100**	***538***	**100**	***519***	**100**	***550***	**100**	***539***	**100**	***529***	**100**	***533***	**100**	***533***	**100**
Males	*2262*	60	*312*	58	*327*	63	*351*	64	*323*	60	*347*	66	*276*	52	*326*	61
Females	*1479*	40	*226*	42	*192*	37	*199*	36	*216*	40	*182*	34	*257*	48	*207*	39
Under 30	*1980*	53	*256*	48	*269*	52	*357*	65	*240*	45	*282*	53	*321*	60	*255*	48
30-49	*1260*	34	*187*	35	*193*	37	*152*	28	*195*	36	*171*	32	*155*	29	*207*	39
50+	*501*	13	*95*	18	*57*	11	*41*	7	*104*	19	*76*	14	*57*	11	*71*	13
Inner city	*1795*	48	*130*	24	*171*	33	*226*	41	*352*	65	*284*	54	*329*	62	*303*	57
Greater Sydney	*1360*	36	*237*	44	*268*	52	*235*	43	*120*	22	*170*	32	*153*	29	*177*	33
Domestic visitors	*289*	8	*71*	13	*38*	7	*55*	10	*21*	4	*46*	9	*35*	7	*23*	4
International visitors	*297*	8	*100*	19	*42*	8	*34*	6	*46*	9	*29*	5	*16*	3	*30*	6
<$50K	*1285*	37	*148*	34	*145*	30	*243*	47	*178*	36	*214*	43	*229*	44	*128*	25
$50 to $100K	*868*	25	*123*	28	*117*	25	*99*	19	*124*	25	*120*	24	*136*	26	*149*	30
$100K+	*710*	21	*94*	21	*122*	26	*101*	20	*102*	21	*76*	15	*69*	13	*146*	29
Refused	*581*	17	*73*	17	*93*	19	*73*	14	*89*	18	*90*	18	*83*	16	*80*	16
Work in the immediate area	*1292*	35	*164*	30	*231*	45	*217*	39	*156*	29	*162*	31	*122*	23	*240*	45

Note: household income asked for residents in Australia only

Sample profile

	PRECINCTS															
	TOTAL		Northern CBD		Central CBD		Southern CBD		Potts Point		Oxford St		Newtown		Pyrmont	
	n=	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%
Total	***3741***	**100**	***538***	**100**	***519***	**100**	***550***	**100**	***539***	**100**	***529***	**100**	***533***	**100**	***533***	**100**
Wednesday																
9am to 3pm	*465*	12	*67*	12	*60*	12	*71*	13	*64*	12	*64*	12	*69*	13	*70*	13
3pm to 6pm	*506*	14	*79*	15	*72*	14	*77*	14	*70*	13	*66*	12	*68*	13	*74*	14
6pm to 9pm	*492*	13	*68*	13	*66*	13	*73*	13	*86*	16	*71*	13	*62*	12	*66*	12
9pm to 12am	*452*	12	*65*	12	*61*	12	*60*	11	*61*	11	*72*	14	*66*	12	*67*	13
Saturday																
9am to 3pm	*458*	12	*65*	12	*62*	12	*63*	11	*63*	12	*68*	13	*74*	14	*63*	12
3pm to 6pm	*467*	12	*66*	12	*62*	12	*75*	14	*66*	12	*63*	12	*70*	13	*65*	12
6pm to 9pm	*466*	12	*66*	12	*70*	13	*67*	12	*65*	12	*65*	12	*66*	12	*67*	13
9pm to 12am	*435*	12	*62*	12	*66*	13	*64*	12	*64*	12	*60*	11	*58*	11	*61*	11

Time spent in the area (hours)

Northern CBD

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
0-less than 1 hour	12	-3	10	15	15	10	15	11	10	14
1-less than 2 hours	18	+2	18	18	15	20	21	14	30	16
2-less than 3 hours	20	+3	17	24	16	25	15	22	17	27
3-less than 4 hours	14	+3	15	13	13	15	16	13	14	13
4-less than 5 hours	8	+2	6	10	7	8	5	11	3	6
5-less than 6 hours	4	-1	6	2	4	4	4	5	1	4
6+ hours	21	-6	28	14	25	17	22	21	25	18
Don't know	3	+1	0	5	4	1	3	3	0	2

Base: respondents interviewed in the Northern CBD area, n=538 (Index=3,741, Day=277, Night=261, Wednesday=279, Saturday=259, Inner city=130, *Greater Sydney=237, Domestic visitors=71, International visitors=100)
Q7

Central CBD

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
0-less than 1 hour	20	+4	23	17	22	18	22	23	8	10
1-less than 2 hours	9	-7	9	9	8	10	10	7	18	10
2-less than 3 hours	13	-4	11	16	11	16	13	12	24	14
3-less than 4 hours	14	+3	11	18	10	18	19	10	13	24
4-less than 5 hours	8	+2	7	9	8	7	6	7	8	19
5-less than 6 hours	5	+1	5	5	5	6	5	7	5	0
6+ hours	29	+1	33	25	33	25	26	33	24	19
Don't know	1	-1	1	1	1	0	1	0	0	5

Base: respondents interviewed in the Central CBD area, n=519 (Index=3,741, Day=256, Night=263, Wednesday=259, Saturday=260, Inner city=171, *Greater Sydney=268, Domestic visitors=38, International visitors=42)
Q7

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Time spent in the area (hours)

Southern CBD

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
0-less than 1 hour	12	-4	8	16	15	8	14	11	5	9
1-less than 2 hours	18	+2	17	19	15	21	22	15	11	24
2-less than 3 hours	20	+3	17	24	19	22	19	22	13	24
3-less than 4 hours	12	+1	14	11	10	15	8	15	13	21
4-less than 5 hours	8	+2	8	8	7	9	8	6	18	6
5-less than 6 hours	5	+1	5	5	3	7	5	5	9	3
6+ hours	23	-4	29	17	29	17	22	26	27	15
Don't know	1	0	1	1	1	1	1	0	4	0

Base: respondents interviewed in the Southern CBD area, n=550 (Index=3,741, Day=286, Night=264, Wednesday=281, Saturday=269, Inner city=226, *Greater Sydney=235, Domestic visitors=55, International visitors=34)
Q7

Potts Point

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom-estic	Intern-ational
0-less than 1 hour	14	-2	15	13	17	11	17	8	12	-2
1-less than 2 hours	17	+2	18	16	15	20	15	20	22	+2
2-less than 3 hours	14	-3	13	16	13	16	14	16	16	-3
3-less than 4 hours	8	-3	8	8	3	13	7	11	6	-3
4-less than 5 hours	6	0	5	7	6	5	6	8	3	0
5-less than 6 hours	4	-1	5	3	4	4	2	8	9	-1
6+ hours	35	+8	35	36	41	29	39	29	30	+8
Don't know	1	0	1	1	1	1	1	1	1	0

Base: respondents interviewed in the Potts Point area, n=539 (Index=3,741, Day=263, Night=276, Wednesday=281, Saturday=258, Inner city=352, *Greater Sydney=120, **Domestic and International visitors=67)
Q7

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Time spent in the area (hours)

Oxford Street

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom / Intl**
0-less than 1 hour	22	+7	25	21	26	18	25	22	15
1-less than 2 hours	17	+1	20	13	13	21	19	14	16
2-less than 3 hours	20	+3	16	24	15	26	16	25	25
3-less than 4 hours	11	0	6	16	10	12	7	18	9
4-less than 5 hours	5	-1	3	6	4	6	6	5	3
5-less than 6 hours	5	0	5	4	5	4	6	4	3
6+ hours	18	-9	22	15	25	11	19	14	25
Don't know	1	0	2	1	1	2	1	1	4

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, *Greater Sydney=153, **Domestic and International visitors=51
Q7

Newtown

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom / Intl**
0-less than 1 hour	12	-4	12	12	15	8	12	13	4
1-less than 2 hours	20	+5	24	16	21	19	22	17	22
2-less than 3 hours	23	+5	25	21	21	25	22	28	18
3-less than 4 hours	12	+1	9	15	10	14	8	18	20
4-less than 5 hours	6	0	5	7	2	9	4	7	12
5-less than 6 hours	4	0	4	4	3	5	3	5	8
6+ hours	22	-5	20	24	26	18	28	11	16
Don't know	1	0	2	0	2	1	2	0	2

Base: respondents interviewed in the Newtown area, n=533 (Index=3,741, Day=281, Night=252, Wednesday=265, Saturday=268, Inner city=329, Greater Sydney=153, **Domestic and International visitors=51)
Q7

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

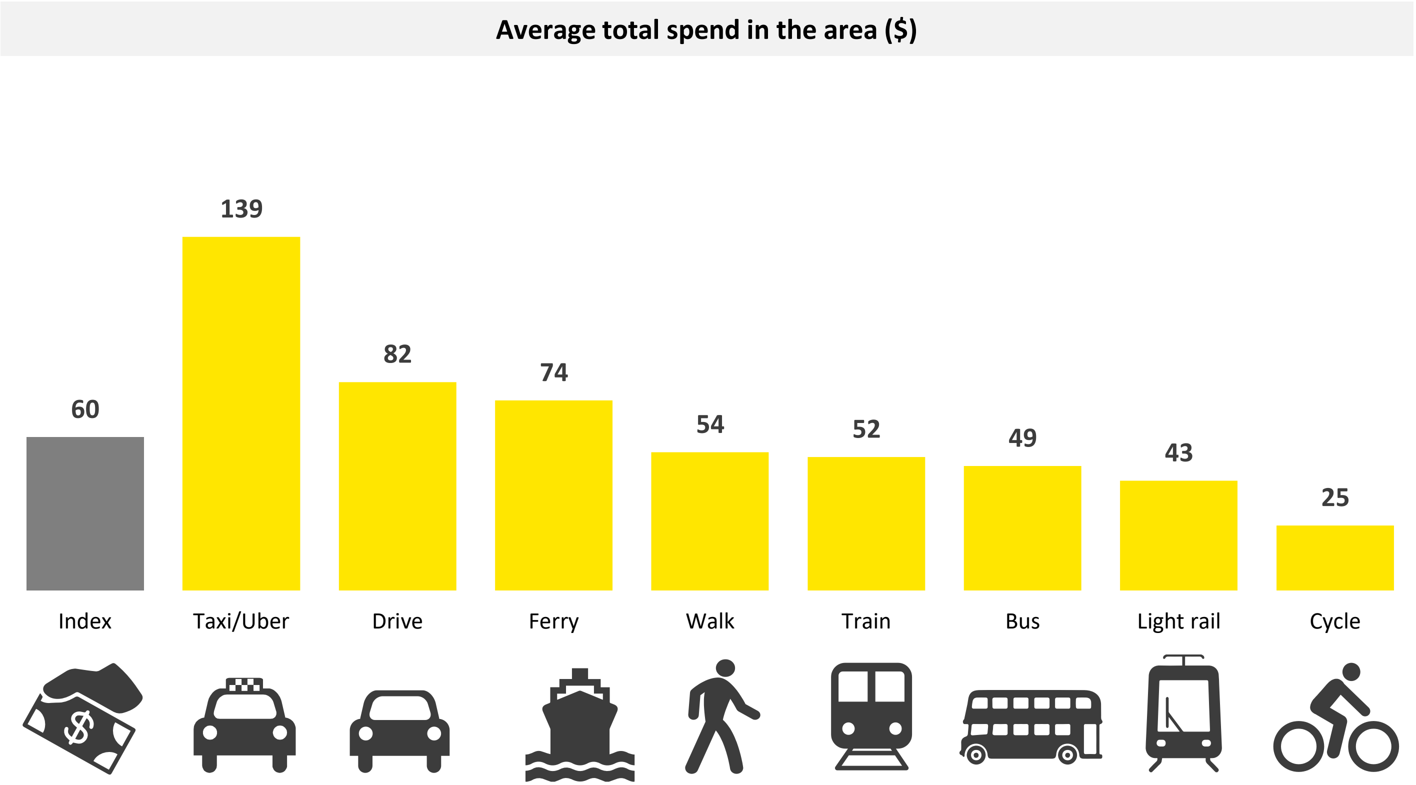
Time spent in the area (hours)

Pyrmont	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom / Intl**
0-less than 1 hour	19	+3	15	23	17	21	21	12	26
1-less than 2 hours	10	-6	8	12	7	13	12	8	9
2-less than 3 hours	11	-6	8	15	6	17	12	12	6
3-less than 4 hours	8	-4	5	11	5	11	8	6	11
4-less than 5 hours	3	-3	3	4	3	4	3	3	9
5-less than 6 hours	4	0	5	3	4	5	5	5	2
6+ hours	43	+15	54	31	58	26	39	53	34
Don't know	2	0	2	2	1	3	2	1	2

Base: respondents interviewed in the Pyrmont area, n=533 (Index=3,741, Day=272, Night=261, Wednesday=277, Saturday=256, Inner City=303, *Greater Sydney=177, **Domestic and International visitors=53)
Q7

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Average spend - by transportation taken to the precinct



Base: All respondents across seven precincts (Northern CBD, Central CBD, Southern CBD, Potts Point, Oxford St, Newtown, and Pyrmont), n=3,741; walk, n=1,763; train, n=1,235; bus, n=752; drive, n=419; taxi/Uber, n=206; cycle, n=95; ferry, n=78; light rail, n=65. Note: where indicative spend was > $1,500, these figures have been removed from the analysis
Q8, Q10

Methods to find out about activities - by age

Main methods used to find out about things to do in Sydney (%)

	Overall	Under 30	30-40	50+
Social media	49	59	47	18
Recommendations from friends/family/colleagues	49	51	48	38
Search engines (e.g. Google)	33	33	35	31
Other websites	13	11	14	15
Event websites (e.g. whatsonsydney, etc.)	10	9	13	9
Travel websites (e.g. trip advisor)	10	10	10	8
Newspapers	9	5	9	23
City of Sydney website	8	6	11	10
TV programmes	5	4	6	11
Tourist flyers	4	3	4	5
Radio	3	2	2	10
Membership emails (e.g. Opera House)	3	2	4	7
Other	3	2	3	7
None of these / Don't know	4	3	5	10

Base: All respondents across seven precincts (Northern CBD, Central CBD, Southern CBD, Potts Point, Oxford St, Newtown, and Pyrmont), n=3,741; Under 30, n=1,980; 30-49, n=1,260; 50+, n=501
D1

EY Sweeney

October 2017

Glebe, Redfern, Surry Hills, and Green Square

Sample profile

PRECINCTS										
	TOTAL		Glebe		Redfern		Surry Hills		Green Square	
	n=	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%
Total	***2119***	**100**	***528***	**100**	***536***	**100**	***533***	**100**	***522***	**100**
Males	*1228*	58	*268*	51	*356*	66	*281*	53	*323*	62
Females	*891*	42	*260*	49	*180*	34	*252*	47	*199*	38
Under 30	*1083*	51	*249*	47	*285*	53	*241*	45	*308*	59
30-49	*744*	35	*192*	36	*188*	35	*203*	38	*161*	31
50+	*292*	14	*87*	16	*63*	12	*89*	17	*53*	10
Inner city	*1558*	74	*413*	78	*388*	72	*372*	70	*385*	74
Greater Sydney	*412*	19	*77*	15	*120*	22	*120*	23	*95*	18
Domestic visitors	*77*	4	*18*	3	*17*	3	*24*	5	*18*	3
International visitors	*72*	3	*20*	4	*11*	2	*17*	3	*24*	5
<$50K	*684*	33	*183*	36	*198*	38	*152*	29	*151*	30
$50 to $100K	*565*	28	*106*	21	*163*	31	*148*	29	*148*	30
$100K+	*529*	26	*140*	28	*99*	19	*147*	28	*143*	29
Refused	*269*	13	*79*	16	*65*	12	*69*	13	*56*	11
Work in the immediate area	*615*	29	*161*	30	*148*	28	*170*	32	*136*	26

Note: household income asked for residents in Australia only

Sample profile

	PRECINCTS									
	TOTAL		Glebe		Redfern		Surry Hills		Green Square	
	n=	%	*n=*	%	*n=*	%	*n=*	%	*n=*	%
Total	***2119***	**100**	***528***	**100**	***536***	**100**	***533***	**100**	***522***	**100**
Wednesday										
9am to 3pm	*280*	13	*62*	12	*89*	17	*64*	12	*65*	12
3pm to 6pm	*271*	13	*73*	14	*64*	12	*67*	13	*67*	13
6pm to 9pm	*270*	13	*74*	14	*64*	12	*64*	12	*68*	13
9pm to 12am	*254*	12	*60*	11	*64*	12	*68*	13	*62*	12
Saturday										
9am to 3pm	*264*	12	*67*	13	*65*	12	*68*	13	*64*	12
3pm to 6pm	*255*	12	*66*	13	*62*	12	*64*	12	*63*	12
6pm to 9pm	*259*	12	*60*	11	*64*	12	*69*	13	*66*	13
9pm to 12am	*266*	13	*66*	13	*64*	12	*69*	13	*67*	13

Time spent in the area (hours)

Glebe

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom / Intl**
0-less than 1 hour	34	+2	27	41	36	31	36	27	21
1-less than 2 hours	18	+3	19	18	17	20	19	12	24
2-less than 3 hours	13	-1	14	12	10	16	14	10	8
3-less than 4 hours	5	-2	5	5	4	6	4	6	13
4-less than 5 hours	3	-1	3	4	3	4	3	5	5
5-less than 6 hours	3	+1	3	3	3	4	2	6	8
6+ hours	22	-2	28	17	26	19	21	31	21
Don't know	1	0	1	0	0	1	1	1	0

Base: respondents interviewed in the Glebe area, n=528 (Index=2,119, Day=268, Night=260, Wednesday=269, Saturday=259 , Inner city=413, *Greater Sydney=77, **Domestic and International visitors=38)
Q2

Redfern

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom / Intl**
0-less than 1 hour	43	+11	38	48	46	38	44	42	21
1-less than 2 hours	12	-3	13	11	10	14	11	13	14
2-less than 3 hours	13	-1	11	16	10	17	14	13	11
3-less than 4 hours	6	-1	6	5	5	6	4	9	18
4-less than 5 hours	4	0	4	4	2	5	3	6	4
5-less than 6 hours	2	0	3	2	2	3	3	2	4
6+ hours	20	-4	25	14	25	15	21	15	29
Don't know	0	-1	0	0	0	0	0	0	0

Base: respondents interviewed in the Redfern area, n=536 (Index=2,119, Day=280, Night=256, Wednesday=281, Saturday=255, Inner city=388, *Greater Sydney=120, **Domestic and International visitors=28)
Q2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

Time spent in the area (hours)

Surry Hills

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom / Intl**
0-less than 1 hour	16	-16	13	18	21	11	14	17	27
1-less than 2 hours	14	-1	16	12	14	13	15	12	12
2-less than 3 hours	21	+7	17	24	19	23	22	22	15
3-less than 4 hours	12	+5	9	16	8	17	11	18	7
4-less than 5 hours	5	+1	5	5	4	6	5	5	7
5-less than 6 hours	3	+1	3	4	2	5	3	4	5
6+ hours	28	+3	37	19	31	25	30	23	27
Don't know	1	0	0	1	1	0	1	0	0

Base: respondents interviewed in the Surry Hills area, n=533 (Index=2,119, Day=263, Night=270, Wednesday=263, Saturday=270, Inner city=372, Greater Sydney=120, Domestic and International visitors=41)
Q2

Green Square

	Overall	Index (Diff)	Day	Night	Wed	Sat	Inner City	G. Syd.*	Dom / Intl**
0-less than 1 hour	36	+4	30	41	35	37	37	31	33
1-less than 2 hours	16	+1	19	13	14	17	16	14	19
2-less than 3 hours	8	-6	11	6	9	8	8	9	12
3-less than 4 hours	5	-2	5	5	6	3	5	5	5
4-less than 5 hours	4	0	3	5	3	5	3	9	5
5-less than 6 hours	2	-1	2	2	2	2	1	5	0
6+ hours	28	+4	30	27	30	27	30	26	21
Don't know	1	0	1	0	0	2	1	0	5

Base: respondents interviewed in the Green Square area, n=498 (Index=2,119, Day=249, Night=249, Wednesday=243, Saturday=255, Inner city=385, Greater Sydney=95, Domestic and International visitors=42)
Q2

Green indicates figure is significantly higher than the expected value
Red indicates figure is significantly lower than the expected value

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ED None.

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