

APPENDIX 1

**TELEPHONE SURVEY SUMMARY REPORT,
MICROMEX RESEARCH**

City of Sydney

Night Time Economy Research – 2018

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Background and Methodology

Objectives

Objectives:

In order to assist with the review of the 'Late Night Trading Premises Development Control Plan 2007', The City of Sydney Council commissioned community consultation research that aims to:

- Test the community's satisfaction with existing late night boundaries and operating times
- Test the appetite for new or changes to current boundaries of late night trading precincts, and operating hours for late night premises
- Discover what types of late night trading the community wants and where

The questionnaire sought to measure the above using two different lenses:

- City of Sydney residents were asked several questions about the late night precinct they lived closed to (**Residential amenity**) – which they may also have visited
- The same residents were asked the same questions about one other late night precinct within the City of Sydney that they had visited in the past two to three years (**Visitation amenity** – 569 of the 601 respondents had visited at least one other precinct)

Structure of Report:

This Summary Report presents the results of the telephone survey component of the research, and is separated into two key sections:

1. **Summary Comparison – Residential versus Visitation Amenity**
2. **Analysis by Precinct – based on combined Residential and Visitation amenity**



Methodology & Sample

Methodology:

Telephone survey.

Data Collection Period:

Telephone interviewing (CATI) was conducted during the period 7th March – 15th March 2018.

Sample:

N=601 interviews were conducted. A sample size of 601 provides a maximum sampling error of plus or minus 4.0% at the 95% confidence level. This means that if the survey was replicated with a new universe of N=601 residents, 19 times out of 20 we would expect to see the same results, i.e. +/- 4.0%. For example, an answer 'yes' (50%) to a question could vary from 46% to 54%.

As the raw data has been weighted to reflect the real community profile of City of Sydney Council, the outcomes reported here reflect an 'effective sample size'; that is, the weighted data provides outcomes with the same level of confidence as unweighted data of a different sample size. In some cases this effective sample size may be smaller than the true number of surveys conducted.

489 of the 601 of respondents were selected by means of a computer based random selection process using the Electronic White Pages.

In addition 112 respondents were recruited face-to-face (and then recontact by mobile phone) to ensure we reached those who don't have a fixed-line phone at home. This process was conducted at a number of areas around City of Sydney Council area, i.e. King Street Newtown, Green Square Station, George St, CBD, Broadway, Central Station, Kings Cross Station and The Rocks Markets.



Methodology & Sample

Data analysis

The data within this report was analysed using Q Professional.

Percentages

All percentages are calculated to the nearest whole number and therefore the total may not exactly equal 100%.



Sample Profile



Sample Profile

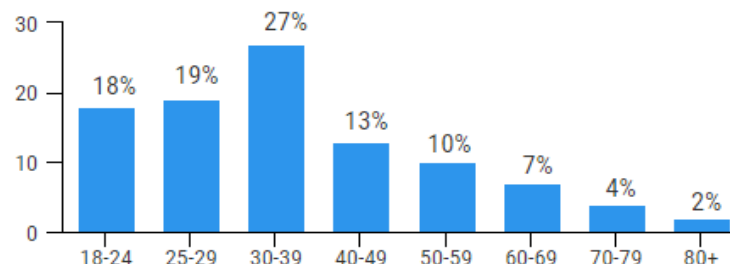
Gender



52%

48%

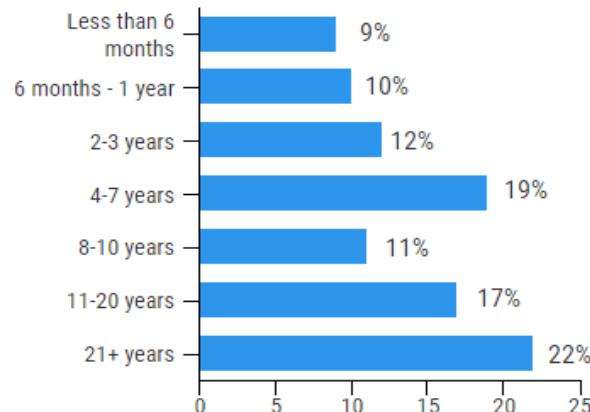
Age



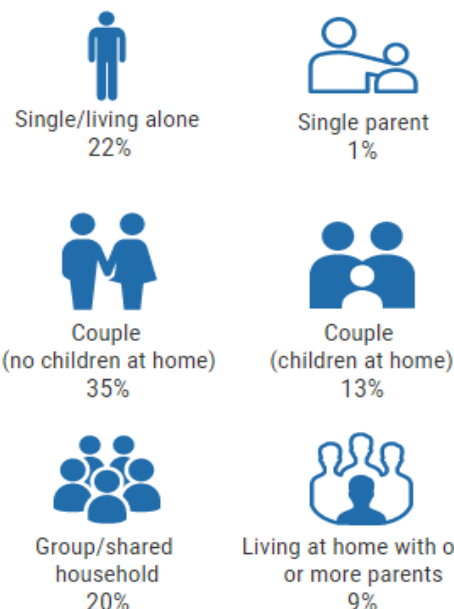
Area



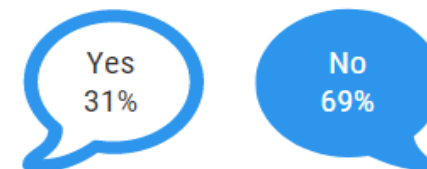
Time lived in the area



Household status



Speak a second language at home



Ratepayer status

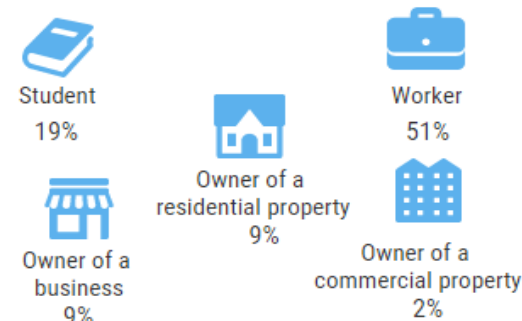


43%

Lease

57%

Involvement in LGA



Base: N = 601

The sample was weighted by age and gender to reflect the 2016 ABS community profile of the City of Sydney Council

Key Project Findings



Key Findings

Size

Overall, 60% of residents would like to see opening hours increased (63% for the precinct closest to where residents live, 58% for another recently visited precinct). Once again, there is very little support for reducing hours (3%).

Options

Overall, equal numbers of residents have selected they would like to see their local/most recently visited late night precinct either expand in size (48%) or remain the same size (49%) – there is very little support for reducing the footprint of these late night precincts (3%).

Interestingly, residents were significantly more likely to support an expansion in size for the precinct closest to where they live (52%) than for another recently visited precinct (44%).

Hours

Overall respondents would like to see more:

- Late opening shops, businesses and services
- Performance venues
- Mixed use venues
- Cafes and restaurants, and
- Small bars

Residents were less keen on additional pubs and nightclubs – be it for the precinct they live closest to or another recently visited precinct.





Residential vs Visitation

Drivers of visiting late night precincts

Where you live



More frequent visits to their local precinct at night

Go home earlier
(45% stay out up until 10PM)



Closest precinct more likely to be described as 'dull'

Also more likely to be described as unsafe



Where you visit

Less frequently visits



Visitors stay out later at night
(49% up until midnight)

Visitation areas perceived as busier and more vibrant



Visitors feel safer in late night precincts

Whilst each precinct is unique, Botany Rd, Green Square stands out as a particularly interesting precinct with respondents visiting this area significantly more frequently on a daily to weekly basis, wanting the area size to expand and opening hours to increase and wanting significantly more late night businesses, cafes and restaurants, performance and mixed use venues.

Compared to other precincts, respondents felt their experience was dull (significantly less likely to say it was busy, vibrant and diverse). It appears respondents are largely invested in Botany Rd Green Square, however, they are in a sense unhappy with it and want more out of the area

Findings in Detail:

1. Summary Comparison



Residential vs Visitation Amenity

Question	Overall N = 1,170	Where you live N = 601	Where you visit N = 569
Q3c/Q4c. Would you like to see the area size:			
Expand	48%	52%▲	44%
Stay the same	49%	45%	52%▲
Reduce	3%	2%	3%
Q3d/Q4d. Would you like to see the opening hours:			
Increase	60%	63%	58%
Stay the same	36%	34%	38%
Reduce	3%	2%	3%

▲▼ = A significantly higher/lower percentage by residential/visitation

Please note: 'can't say' responses have not been shown in the table above

Overall, there is very little support for reducing the size and opening hours of late night precincts. In terms of precinct size, results are evenly split between expanding and staying the same – whereas for opening hours, there is a clear preference for increasing the hours.

Interestingly, when asked about the precinct they live closest to, residents were significantly more likely to state they would like the area to expand than when asked about the other area they have visited

Residential vs Visitation Amenity

% of those that selected 'More'

Q3f/Q4e. Would you like more, the same or less of these types of businesses:	Overall N = 1,170-1,202	Where you live N = 601	Where you visit N = 569
Late opening shops, businesses and services	72%	74%	73%
Performance venues for live music or cultural events	71%	75%	72%
Mixed use venues with bars, performance and cultural space	68%	67%	73%▲
Cafes and restaurants	66%	72%▲	63%
Small bars	64%	67%	64%
Pubs	30%	27%	34%▲
Nightclubs	28%	26%	31%

Please see overleaf for summary of results by mean
Using the scale: 1=more, 0=same, -1=less

▲ ▼ = Significantly higher/lower by residential/visitation

Please note: percentages are calculated to include those that selected 'can't say'

Overall, pubs and nightclubs were the least favoured business types for expansion. There was significantly greater support for more cafes and restaurants when residents thought about the precinct they live closest to – whereas there was more support for mixed use venues/pubs when thinking about the other precinct visited

Residential vs Visitation Amenity

Reporting Mean Scores

Q3f/Q4e. Would you like more, the same or less of these types of businesses:	Overall N = 1,152-1,166	Where you live N = 589-597	Where you visit N = 563-568
Late opening shops, businesses and services	0.72	0.73	0.72
Performance venues for live music or cultural events	0.70	0.70	0.70
Mixed use venues with bars, performance and cultural space	0.68	0.63	0.72▲
Cafes and restaurants	0.67	0.72▲	0.62
Small bars	0.61	0.61	0.61
Pubs	0.20	0.15	0.24▲
Nightclubs	0.08	0.02	0.14▲

Scale: 1=more, 0=same, -1=less

▲▼= Significantly higher/lower by residential/visitation

This slide is based on the same question as the previous slide – however, we have reported mean scores based on ‘More = 1’, ‘Same = 0’, and ‘Less = -1’.

Once again, pubs and nightclubs were the least favoured business types for expansion.

Residential vs Visitation Amenity

Question	Overall N = 1,170	Where you live N = 601	Where you visit N = 569
Q3g/Q4f. How often do you go out to the precinct at night:			
Daily/Weekly	51%	66%▲	32%
Fortnightly	18%	11%	25%▲
Less frequently	31%	18%	43%▲
Q3h/Q4g. Describe your experience:		Visitors N=572	
Safe	91%	89%	93%▲
Diverse	80%	78%	81%
Busy, with lots of people around	74%	68%	80%▲
Vibrant	70%	65%	76%▲
Dull	19%	24%▲	13%
Unsafe	9%	12%▲	7%
Q3i/Q4h. How late do you stay out:			
Up until 10pm	37%	45%▲	29%
Up until midnight	46%	42%	49%▲
Past midnight	17%	13%	22%▲

▲▼ = A significantly higher/lower percentage by residential/visitation

Please note: 'can't say' and 'not at all' responses have not been shown in the table above

Visitation profile differs by whether residents are thinking about their closest precinct (more frequent visits – but head home earlier, perceived as less safe/more dull) or the other precinct they choose to visit (less frequent visitation – but stay there later and perceived as safer/busier/more vibrant)

Findings in Detail:

2. Analysis by Precinct

All 601 respondents were asked about the one late night precinct they lived closest to (regardless of whether or not they had visited it) from a list of 17 precincts. Then, 569 of the 601 respondents were asked about one other late night precinct from the list of 17 they have been to (the other 32 has not visited any other precincts from the list of 17). By combining these two dataset, we have a total base of 1,170 'occasions' (but still based on the same 601 respondents). This larger dataset of 'occasions' allows us to look at results by Precinct (although even with the combined data, the sample for some precincts is very small).

Size of Precincts



Where you
live/visit

Q3c. Would you like to see the area of the [precinct from Q3a] precinct...

Q4c. Thinking about the [precinct from Q4a or Q4b] precinct... Would you like to see the area of the precinct

Table is read across the row

Precinct	Expand in size	Stay the same size	Reduce in size	Can't say	Base
King St, Newtown	40%	56%	4%	0%	164
Glebe Point Rd, Glebe	51%	49%	0% ▼	0%	109
Sydney CBD – for example, Clarence, George, and York Streets	48%	45%	7%	0%	106
Darling Harbour and Union St, Pyrmont	46%	50%	4%	0%	105
Kings Cross, Potts Point and Darlinghurst	58%	40%	2%	0%	102
Broadway	34%	60%	5%	0%	85
Botany Rd, Green Square	83% ▲	16% ▼	0% ▼	0%	83
Crown St, Surry Hills	43%	51%	2%	4% ▲	78
Oxford St and Taylor Square	57%	42%	0% ▼	0%	64
Circular Quay and The Rocks	26% ▼	73% ▲	1%	0%	54
Erskineville Rd, Erskineville	49%	50%	1%	0%	53
Redfern St and Regent St, Redfern	54%	43%	2%	1%	49
Devonshire St and Elizabeth St, Central Station	76% ▲	24%	1%	0%	31
Oxford St, Paddington	50%	50%	0%	0%	30
Haymarket	13% ▼	75% ▲	12%	0%	30
Woolloomooloo	30%	68%	2%	0%	15
East Sydney – for example, Stanley St and William St	12% ▼	85% ▲	3%	0%	10

▲ ▼ = A significantly higher/lower percentage (by group). Table is read across the row.

Respondents who visit 'Botany Rd Green Square' and 'Devonshire St and Elizabeth St' were significantly more likely than those who visited other precincts to want the area to expand in size

Precinct Hours



Where you
live/visit

Q3d. And would you like to see the hours that late night premises in the [precinct from Q3a] precinct are allowed to stay open...

Q4d. And would you like to see the hours that late night premises in the [precinct from Q4a or Q4b] precinct are allowed to stay open...

Table is read across the row

Precinct	Increase hours	Stay the same	Reduce hours	Can't say	Base
King St, Newtown	54%	44%	2%	1%	164
Glebe Point Rd, Glebe	57%	41%	0%▼	1%	109
Sydney CBD – for example, Clarence, George, and York Streets	59%	34%	6%	0%	106
Darling Harbour and Union St, Pyrmont	49%	44%	7%	1%	105
Kings Cross, Potts Point and Darlinghurst	72%	26%	1%	1%	102
Broadway	67%	28%	4%	0%	85
Botany Rd, Green Square	77%	22%	0%▼	2%	83
Crown St, Surry Hills	68%	31%	0%	1%	78
Oxford St and Taylor Square	76%	24%	0%▼	0%	64
Circular Quay and The Rocks	54%	44%	1%	1%	54
Erskineville Rd, Erskineville	50%	47%	1%	1%	53
Redfern St and Regent St, Redfern	58%	36%	3%	3%▲	49
Devonshire St and Elizabeth St, Central Station	64%	34%	3%	0%	31
Oxford St, Paddington	45%	44%	11%	0%	30
Haymarket	52%	34%	12%	2%	30
Woolloomooloo	52%	46%	2%	0%	15
East Sydney – for example, Stanley St and William St	59%	41%	0%	0%	10

▲▼ = A significantly higher/lower percentage (by group). Table is read across the row.

Very similar results by precinct

Types of Businesses in the Area



Where you live/visit

Q3f. Still thinking about the [precinct from Q3a] precinct, as I read out the following types of late night premises, please tell me whether you would like to have more, the same, or less of these types of businesses in the area...

Q4e. Still thinking about the [precinct from Q4a or Q4b] precinct, as I read out the following types of late night premises, please tell me whether you would like to have more, the same, or less of these types of businesses in the area...

% of those that selected 'More' (Table is read across the row)

Precinct	Late opening shops, businesses and services	Performance venues	Mixed use venues	Cafes and Restaurants	Small bars	Pubs	Nightclubs	Base
King St, Newtown	76%	79%	77%	43%▼	70%	14%▼	28%	161
Glebe Point Rd, Glebe	72%	75%	60%	68%	44%▼	27%	28%	108
Sydney CBD – for example, Clarence, George, and York Streets	77%	69%	73%	75%	59%	41%	37%	105
Darling Harbour and Union St, Pyrmont	79%	61%	50%▼	57%	52%	30%	11%▼	102
Kings Cross, Potts Point and Darlinghurst	71%	82%	79%	78%	88%▲	40%	42%▲	101
Broadway	75%	61%	61%	64%	50%	18%	22%	82
Botany Rd, Green Square	87%	89%▲	81%	86%	76%	45%	23%	79
Crown St, Surry Hills	72%	65%	74%	51%▼	60%	26%	38%	78
Oxford St and Taylor Square	70%	86%	88%▲	83%	91%▲	44%	53%▲	63
Circular Quay and The Rocks	75%	64%	50%	69%	50%	26%	25%	54
Erskineville Rd, Erskineville	85%	73%	83%▲	70%	81%▲	15%	4%▼	53
Redfern St and Regent St, Redfern	58%	90%▲	76%	79%	77%	50%▲	34%	48
Devonshire St and Elizabeth St, Central Station	82%	82%	90%▲	92%▲	69%	43%	27%	31
Oxford St, Paddington	71%	79%	58%	83%	81%	36%	38%	30
Haymarket	58%	47%	45%	81%	52%	4%▼	27%	26
Woolloomooloo	43%▼	51%	74%	75%	76%	22%	5%▼	15
East Sydney – for example, Stanley St and William St	23%▼	70%	34%▼	78%	87%▲	51%	6%▼	10

▲▼ = Significantly higher/lower (by group). Table is read across the row.

Please note: percentages are calculated to include those that selected 'can't say'

Whilst support for Pubs and Nightclubs was relatively low overall, there were some differences by Precinct.

The slide overleaf reports the same question, based on mean scores (where 'More = 1', 'Same = 0', and 'Less = -1').

Types of Businesses in the Area



Where you
live/visit

Q3f. Still thinking about the [precinct from Q3a] precinct, as I read out the following types of late night premises, please tell me whether you would like to have more, the same, or less of these types of businesses in the area...

Q4e. Still thinking about the [precinct from Q4a or Q4b] precinct, as I read out the following types of late night premises, please tell me whether you would like to have more, the same, or less of these types of businesses in the area...

Reporting Mean Scores

Precinct	Late opening shops, businesses and services	Performance venues	Mixed use venues	Cafes and Restaurants	Small bars	Pubs	Nightclubs	Base
King St, Newtown	0.75	0.79	0.76	0.40▼	0.66	0.11	0.16	161
Glebe Point Rd, Glebe	0.69	0.69	0.55	0.68	0.39▼	0.17	0.05	108
Sydney CBD – for example, Clarence, George, and York Streets	0.76	0.62	0.71	0.75	0.54	0.21	0.15	105
Darling Harbour and Union St, Pyrmont	0.78	0.59	0.47▼	0.55	0.40	0.14	-0.07	102
Kings Cross, Potts Point and Darlinghurst	0.70	0.78	0.78	0.78	0.86▲	0.30	0.15	101
Broadway	0.73	0.53	0.58	0.63	0.43	0.09	0.08	82
Botany Rd, Green Square	0.90▲	0.90▲	0.83▲	0.90▲	0.72	0.35	-0.11	79
Crown St, Surry Hills	0.70	0.60	0.71	0.50	0.51	0.16	0.27	78
Oxford St and Taylor Square	0.70	0.87▲	0.89▲	0.83▲	0.91▲	0.39	0.38	63
Circular Quay and The Rocks	0.71	0.62	0.48	0.69	0.49	0.13	0.02	54
Erskineville Rd, Erskineville	0.81	0.70	0.80	0.70	0.80▲	0.07	-0.35▼	53
Redfern St and Regent St, Redfern	0.54	0.87▲	0.73	0.77	0.68	0.43▲	0.19	48
Devonshire St and Elizabeth St, Central Station	0.81	0.80	0.89▲	0.92▲	0.64	0.37	0.11	31
Oxford St, Paddington	0.71	0.76	0.57	0.83	0.80	0.23	0.21	30
Haymarket	0.57	0.36	0.33	0.80	0.38	-0.28▼	-0.05	26
Woolloomooloo	0.14	0.26	0.72	0.75	0.76	0.16	-0.27	15
East Sydney – for example, Stanley St and William St	0.23▼	0.70	0.34▼	0.78	0.87▲	0.37	-0.29▼	10

▲▼ = Significantly higher/lower (by group)

Scale: 1=more, 0=same, -1=less

This slide is based on the same question as the previous slide – however, we have reported mean scores based on 'More = 1', 'Same = 0', and 'Less = -1'.

Residents who visit 'Botany Road, Green Square' and 'Oxford Street and Taylor Square' were more likely than those who visit other areas to generate higher mean scores.

Description of Experience



Where you
live/visit

Q3h. When you visit the [precinct from Q3a] precinct at night, which of the following describes your experience?
Q4g. When you visit the [precinct from Q4a or Q4b] precinct at night, which of the following describes your experience?

Table is read across the row

Precinct	Safe	Busy	Vibrant	Diverse	Dull	Unsafe	None of these	Base
King St, Newtown	92%	99%▲	95%▲	95%▲	6%▼	7%	0%	163
Glebe Point Rd, Glebe	97%▲	57%▼	58%	79%	26%	7%	0%	107
Sydney CBD – for example, Clarence, George, and York Streets	93%	77%	64%	74%	24%	10%	0%	106
Darling Harbour and Union St, Pyrmont	95%	89%▲	92%▲	80%	9%	3%▼	0%	105
Kings Cross, Potts Point and Darlinghurst	87%	60%▼	62%	85%	23%	12%	0%	101
Broadway	97%▲	75%	61%	84%	33%	4%	0%	83
Botany Rd, Green Square	92%	25%▼	12%▼	45%▼	54%▲	3%▼	5%▲	66
Crown St, Surry Hills	88%	83%	79%	88%	8%	12%	0%	78
Oxford St and Taylor Square	92%	80%	75%	72%	14%	10%	0%	64
Circular Quay and The Rocks	91%	99%▲	81%	81%	4%▼	12%	0%	54
Erskineville Rd, Erskineville	99%▲	52%▼	65%	79%	8%	1%▼	0%	52
Redfern St and Regent St, Redfern	72%▼	36%▼	65%	82%	21%	32%▲	0%	47
Devonshire St and Elizabeth St, Central Station	79%	66%	51%	68%	42%	24%	0%	30
Oxford St, Paddington	100%	67%	69%	58%	5%▼	0%	0%	30
Haymarket	84%	95%▲	94%▲	98%▲	6%▼	26%	0%	30
Woolloomooloo	76%	83%	58%	65%	30%	25%	0%	15
East Sydney – for example, Stanley St and William St	100%	84%	65%	80%	10%	3%	0%	10

▲▼ = A significantly higher/lower percentage (by group). Table is read across the row.

‘Botany Road Green Square’ appears to have a less well developed late night persona relative to the other precincts

Time Spent Out in Precinct



Where you
live/visit

- Q3i. On average, how late do you stay out in the [precinct from Q3a] precinct?
Q4h. On average, how late do you stay out in the [precinct from Q4a or Q4b] precinct?

Table is read across the row

Precinct	Up until 10.00pm	Up until midnight	Past midnight	Base
King St, Newtown	21% ▼	47%	32% ▲	163
Glebe Point Rd, Glebe	42%	49%	9%	107
Sydney CBD – for example, Clarence, George, and York Streets	39%	37%	24%	106
Darling Harbour and Union St, Pyrmont	42%	40%	19%	105
Kings Cross, Potts Point and Darlinghurst	31%	52%	16%	101
Broadway	51%	40%	9%	83
Botany Rd, Green Square	63% ▲	37%	0% ▼	66
Crown St, Surry Hills	35%	49%	16%	78
Oxford St and Taylor Square	10% ▼	35%	55% ▲	64
Circular Quay and The Rocks	12% ▼	75% ▲	13%	54
Erskineville Rd, Erskineville	38%	61%	1% ▼	52
Redfern St and Regent St, Redfern	60% ▲	37%	3% ▼	47
Devonshire St and Elizabeth St, Central Station	46%	52%	2% ▼	30
Oxford St, Paddington	49%	40%	11%	30
Haymarket	33%	45%	23%	30
Woolloomooloo	62%	38%	0%	15
East Sydney – for example, Stanley St and William St	87% ▲	13% ▼	0%	10

▲ ▼ = A significantly higher/lower percentage (by group). Table is read across the row.

‘King Street Newtown’ and ‘Oxford Street and Taylor Square’ appear to be the favoured locations for staying out past midnight

Suggested New Precincts



Where you
live/visit

Q6. Are there any other areas within the City of Sydney local government area where you think new late night entertainment precincts are needed?

Suggested Area	N = 601
Green Square/Botany Rd/Zetland	7%
Sydney CBD e.g. Martin Place, Market St, George St, etc.	6%
Darling Harbour/Pyrmont	4%
Kings St/Newtown	4%
Central Station/Park and surrounding area	3%
Crown St/Surry Hills	2%
Glebe Point Rd/Glebe	2%
Kings Cross, Potts Point and Darlinghurst	2%
Oxford Street/Taylor Square/Paddington	2%
Redfern	2%
Alexandria	1%
Barangaroo	1%
Camperdown	1%
Chippendale	1%
Circular Quay and The Rocks	1%
Double Bay	1%
Haymarket/Chinatown	1%
Kiribilli	1%
Marrickville	1%
Northern Sydney	1%
Rosebery	1%
Ultimo	1%
Williams St	1%
Unspecified area - just more dining options and entertainment venues across Sydney	2%
Don't know/ nothing	59%

Areas surrounding 'Green Square/Botany Rd/Zetland' and the 'Sydney CBD' were the most frequently mentioned areas for possible new late night precincts

Appendix: The Questionnaire



**City of Sydney – Late Night Trading
Questionnaire**

Spiel (for cold-calling – a slightly different intro spiel is used for number harvested respondents)

Good morning/afternoon/evening, my name isand I'm calling on behalf of the City of Sydney Council from a company called Micromex. We are conducting a special survey with residents of the Sydney local government area on recreation and leisure issues.

For demographic purposes, we are firstly looking for those aged 18-34, as they are more difficult to get hold of. Who would be the best person in your household to speak to?

If they say there are no 18-34

Everyone in the community is encouraged to participate regardless of age or gender, would now be a good time to share your opinions?

If no Thank you for your time anyway.

If yes Before we start I would like to check, do you live in the City of Sydney local government area?

If no I'm sorry but you don't qualify for the interview.

If yes Can I confirm that you are aged 18 years or over?

If no I'm sorry but you don't qualify for the interview.

If yes I need to advise you that my supervisor may monitor this call for quality control purposes and that all of your details will be kept strictly confidential.

FAQ's:

How long will the survey take? Approximately 8-10 minutes

Do not call register - As a market & social research organisation, we are exempt from the Do Not Call Register. We are not trying to sell or market anything to you, and your decision to participate in this survey is voluntary.

Q1. In which suburb do you live?

North (Quota of 150 interviews):

- ☐ CSD
- ☐ The Rocks
- ☐ Pyrmont
- ☐ Haymarket
- ☐ Millers Point
- ☐ Ultimo
- ☐ Chippendale

East (Quota of 150 interviews):

- ☐ Paddington
- ☐ Surry Hills
- ☐ Darlinghurst
- ☐ Elizabeth Bay
- ☐ Rushcutters Bay
- ☐ Kings Cross
- ☐ Potts Point
- ☐ Woollahra

South (Quota of 150 interviews):

- ☐ Green Square
- ☐ Zetland
- ☐ Rosebery
- ☐ Alexandria
- ☐ Beaconsfield has a way
- ☐ Waterloo
- ☐ Redfern

West (Quota of 150 interviews):

- ☐ Glebe
- ☐ Forest Lodge
- ☐ Erskineville
- ☐ Newtown
- ☐ Camperdown
- ☐ Annandale
- ☐ Darlington
- ☐ St Peters

Ward unknown:

- ☐ Barangaroo
- ☐ Centennial Park
- ☐ Dawes Point
- ☐ Eveleigh
- ☐ Moore Park
- ☐ Brickfield Hill
- ☐ Broadway
- ☐ Central
- ☐ Chinatown
- ☐ Circular Quay
- ☐ Darling Harbour
- ☐ East Sydney
- ☐ Garden Island
- ☐ Glebe Point
- ☐ Hyde Park
- ☐ Martin Place
- ☐ Railway Square
- ☐ Royal Botanic Garden
- ☐ Strawberry Hills
- ☐ The Domain
- ☐ The Hungry Mile
- ☐ Three Saints Square
- ☐ Town Hall
- ☐ University of Sydney
- ☐ Wynyard
- ☐ Other (Terminate)

Q2. Apart from being a resident, which, if any, of the following describe your involvement in the City of Sydney Local Government Area? *Prompt (MR)*

- ☐ Owner of commercial property in the LGA
- ☐ Owner of a business in the LGA
- ☐ Owner of residential rental property in the LGA
- ☐ Worker in the LGA
- ☐ Student in the LGA
- ☐ None of these (Do NOT prompt)

Residential Amenity:

Council is interested in your opinion about trading hours and areas for late night premises across the City. Late night premises include bars, restaurants and cafes, retail, cultural venues, entertainment and music venues – that stay open after 10.00pm on one or more nights a week. Late night premises operate in a number of different areas right across the local government area – and usually there are precincts of multiple late night premises all clustered close to each other.

Q3a. Which one of the following late night precincts would be closest to where you live? *Prompt (SR)*

- ☐ King St, Newtown
- ☐ Erskineville Rd, Erskineville
- ☐ Botany Rd, Green Square
- ☐ Redfern St and Regent St, Redfern
- ☐ Devonshire St and Elizabeth St, Central Station
- ☐ Glebe Point Rd, Glebe
- ☐ Broadway
- ☐ Darling Harbour and Union St, Pyrmont
- ☐ Crown St, Surry Hills
- ☐ Oxford St and Taylor Square
- ☐ Oxford St, Paddington
- ☐ Sydney CBD – for example, Clarence, George, and York Streets
- ☐ Haymarket
- ☐ Circular Quay and The Rocks
- ☐ East Sydney – for example, Stanley St and William St
- ☐ Kings Cross, Potts Point and Darlinghurst
- ☐ Woolloomooloo
- ☐ Can't say (Do NOT prompt) (Go to Q4a)

Q3b. How far from where you live would you say the [precinct from Q3a] precinct is? Would you say... *Prompt (SR)*

- ☐ Within one block from where you live
- ☐ Two to three blocks from where you live
- ☐ Four to five blocks from where you live
- ☐ Six or more blocks from where you live
- ☐ Can't say (Do NOT prompt)

Q3c. Would you like to see the area of the [precinct from Q3a] precinct... *Prompt (SR)*

- ☐ Expand in size to include more late night premises
- ☐ Stay the same size and not really grow
- ☐ Reduce in size, with fewer late night premises
- ☐ Can't say (Do NOT prompt)

Q3d. And would you like to see the hours that late night premises in the [precinct from Q3a] precinct are allowed to stay open... *Prompt*

- ☐ Increase, so they can stay open later
- ☐ Stay the same as they are now
- ☐ Be reduced, so they have to close earlier
- ☐ Can't say (Do NOT prompt)

Q3e. [If suggested changes to the hours or areas in 3c or 3d] Why would you like to see changes in the area/hours? (Interviewer: Ensure answers match response codes)

Q3f. Still thinking about the [precinct from Q3a] precinct, as I read out the following types of late night premises, please tell me whether you would like to have more, the same, or less of these types of businesses in the area... *Prompt*

	More	Same	Less	Can't say
Pubs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nightclubs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cafes and restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Small bars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance venues for live music or cultural events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mixed use venue with bars, performance and cultural space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Late opening shops, businesses and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q3g. On average, how often, if at all, do you go out at night in the [precinct from Q3a] precinct? *Prompt (SR)*

- ☐ Daily
- ☐ Weekly
- ☐ Fortnightly
- ☐ Once a month
- ☐ Every 2-3 months
- ☐ 2-3 times a year or less
- ☐ Not at all (Skip to Q4a)

Q3h. When you visit the [precinct from Q3a] precinct at night, which of the following describes your experience? Please say Yes or No as I read each one. *Randomise. Prompt (MR)*

- ☐ Safe
- ☐ Busy, with lots of people around
- ☐ Vibrant
- ☐ Diverse
- ☐ Dull
- ☐ Unsafe

Q3i. On average, how late do you stay out in the [precinct from Q3a] precinct? *Prompt (SR)*

- ☐ Up until 10.00pm
- ☐ Up until midnight
- ☐ Up until 2.00am
- ☐ Up until 4.00am
- ☐ All night

Visitation Amenity:

Now I would like you to think about precincts that you have been to at night for recreation or leisure within the City of Sydney area in the past two or three years.

Q4a. Which, if any, of the following precincts have you been to at night in the past two to three years? Just say yes or no as I read each one. *Prompt (MR)*

- ☐ King St, Newtown
- ☐ Erskineville Rd, Erskineville
- ☐ Botany Rd, Green Square
- ☐ Redfern St and Regent St, Redfern
- ☐ Devonshire St and Elizabeth St, Central Station
- ☐ Glebe Point Rd, Glebe
- ☐ Broadway
- ☐ Darling Harbour and Union St, Pyrmont
- ☐ Crown St, Surry Hills
- ☐ Oxford St and Taylor Square
- ☐ Oxford St, Paddington
- ☐ Sydney CBD – for example, Clarence, George, and York Streets
- ☐ Haymarket
- ☐ Circular Quay and The Rocks
- ☐ East Sydney – for example, Stanley St and William St
- ☐ Kings Cross, Potts Point and Darlinghurst
- ☐ Woolloomooloo
- ☐ None (Do NOT prompt) (Go to Q5)
- ☐ Can't say (Do NOT prompt) (Go to Q6)

Programmer: If two or more precincts selected on Q4a, ask Q4b – otherwise, skip to Q4c

Q4b. Which one of those precincts have you visited most recently? *Prompt (SR)* (Only display those selected in Q4a – and if possible exclude precinct mentioned in Q3a).

- ☐ King St, Newtown
- ☐ Erskineville Rd, Erskineville
- ☐ Botany Rd, Green Square
- ☐ Redfern St and Regent St, Redfern
- ☐ Devonshire St and Elizabeth St, Central Station
- ☐ Glebe Point Rd, Glebe
- ☐ Broadway
- ☐ Darling Harbour and Union St, Pyrmont
- ☐ Crown St, Surry Hills
- ☐ Oxford St and Taylor Square
- ☐ Oxford St, Paddington
- ☐ Sydney CBD – for example, Clarence, George, and York Streets
- ☐ Haymarket
- ☐ Circular Quay and The Rocks
- ☐ East Sydney – for example, Stanley St and William St
- ☐ Kings Cross, Potts Point and Darlinghurst
- ☐ Woolloomooloo

Q4c. Thinking about the [precinct from Q4a or Q4b] precinct... Would you like to see the area of the precinct... *Prompt (SR)*

- ☐ Expand in size to include more late night premises
- ☐ Stay the same size and not really grow
- ☐ Reduce in size, with fewer late night premises
- ☐ Can't say (Do NOT prompt)

Q4d. And would you like to see the hours that late night premises in the [precinct from Q4a or Q4b] precinct are allowed to stay open... *Prompt*

- ☐ Increase, so they can stay open later
- ☐ Stay the same as they are now
- ☐ Be reduced, so they have to close earlier
- ☐ Can't say (Do NOT prompt)

Note: There is NO open-ender about reasons for wanting change

Q4e. Still thinking about the [precinct from Q4a or Q4b] precinct, as I read out the following types of late night premises, please tell me whether you would like to have more, the same, or less of these types of businesses in the area... *Prompt*

	More	Same	Less	Can't say
Pubs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nightclubs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cafes and restaurants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Small bars	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance venues for live music or cultural events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mixed use venue with bars, performance and cultural space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Late opening shops, businesses and services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4f. On average, how often do you go out at night in the [precinct from Q4a or Q4b] precinct? *Prompt (SR)*

- ☐ Daily
- ☐ Weekly
- ☐ Fortnightly
- ☐ Once a month
- ☐ Every 2-3 months
- ☐ 2-3 times a year or less

Q4g. When you visit the [precinct from Q4a or Q4b] precinct at night, which of the following describes your experience? Please say yes or no as I read each one. *Randomise. Prompt (MR)*

- ☐ Safe
- ☐ Busy, with lots of people around
- ☐ Vibrant
- ☐ Diverse
- ☐ Dull
- ☐ Unsafe

Q4h. On average, how late do you stay out in the [precinct from Q4a or Q4b] precinct? (SR, Prompt)

- ☐ Up until 10.00pm
- ☐ Up until midnight
- ☐ Up until 2.00am
- ☐ Up until 4.00am
- ☐ All night

Q5. [If 'None' on Q4a, ask] You mentioned that in the past two to three years, you had not visited at night any of the precincts I read out. Why in particular have you not visited any of those precincts at night?

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Suggested New Precincts:

Q6. [Ask Everyone] Are there any other areas within the City of Sydney local government area where you think new late night entertainment precincts are needed? (If Yes: Please provide as much detail as possible about where you think new late night precincts are needed)

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Demographics:

Finally, some questions about you...

Q7a. What is your gender? (Do NOT Prompt)

- ☐ Male
- ☐ Female
- ☐ Indeterminate/Intersex/Unspecified

Q7b. Which of these age groups do you fit into?

- ☐ 18 – 24
- ☐ 25 – 29
- ☐ 30 – 39
- ☐ 40 – 49
- ☐ 50 – 59
- ☐ 60 – 69
- ☐ 70 – 79
- ☐ 80 years and over

Q8. Do you speak a language other than English at home?

- ☐ Yes
- ☐ No

Q9. How long have you lived in the City of Sydney area? Prompt

- ☐ Less than 6 months
- ☐ 6 months – 1 year
- ☐ 2 – 3 years
- ☐ 4 – 7 years
- ☐ 8 – 10 years
- ☐ 11 – 20 years
- ☐ 21+ years

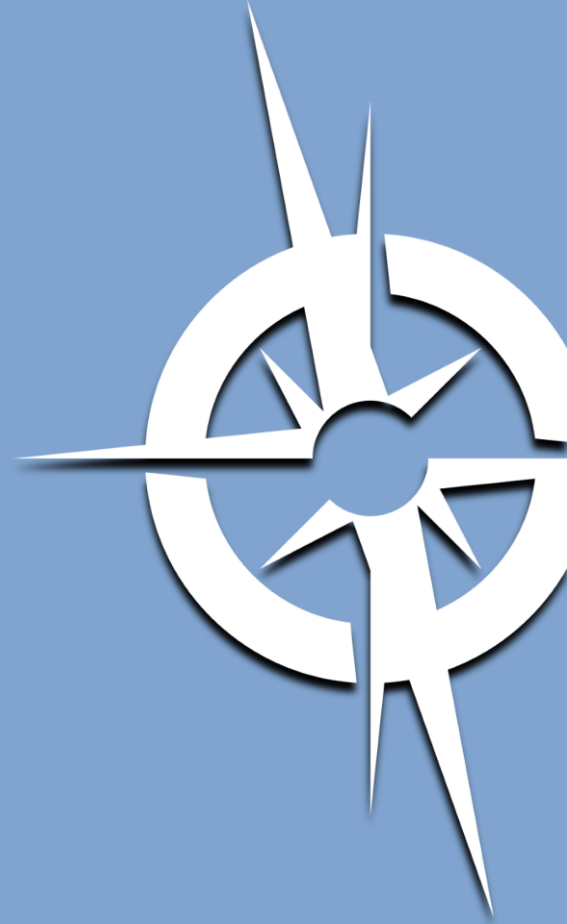
Q10. Which of the following best describes the house where you are currently living? Prompt

- ☐ I/We own/are currently buying this property
- ☐ I/We currently rent this property

Q11. What is your household status? Prompt

- ☐ Single/living alone
- ☐ Single parent (children at home)
- ☐ Couple (children at home)
- ☐ Couple (no children at home)
- ☐ Group/shared household
- ☐ Living at home with one or more parents
- ☐ Prefer not to state (Do NOT prompt)
- ☐ Other (please specify) (Do NOT prompt)

Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you provided will be used only for research purposes. Just to remind you, I am calling from Micromex Research on behalf of City of Sydney Council.



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