

FLICKING THE SWITCH

Research and insights to help Sydney's CBD
turn the lights on a new era





■ FOREWORD

When I became the inaugural New South Wales 24-Hour Economy Commissioner, the Sydney CBD had already faced a year of the COVID-19 pandemic. The impact of lockdowns and a significant shift to working from home has been well documented elsewhere. Many businesses in the CBD have had a chastening experience, from the office tower café that served coffees to early morning office workers, to the small bar that gave them a deserved drink at the end of the day.

The images of deserted main streets like George and Pitt have been hard to absorb. That's why one of my first acts as Commissioner was to ask EY to develop ideas on how the CBD can recover, using entertainment, hospitality, arts and culture as a major driver. My instructions to the team were minimal: engage widely with people involved with the CBD and be bold and imaginative in your recommendations. The team has excelled on both counts.

This is an independent report and not all policy recommendations are, or will be, state government policy. However, it is right that we debate the merits of the ideas proposed in this report. The Sydney CBD is too important to Sydney's economy, brand and collective identity to not have a plan to reactivate it.

Why focus on the CBD's social and cultural offer? Because the process of recovery requires us to recognise that things have changed and to acknowledge those areas that have been hardest hit. Working patterns are likely to remain different to before the pandemic (as they have in almost all major cities around the world), so we need to find new ways of attracting visitors to the CBD for non-work purposes.

We already have good foundations to build on. The CBD already boasts experiences from street hawker food off Broadway, to a bar in The Rocks rated as one of the top 50 in the world. And that's before we get to the most iconic opera house in the world.

The CBD is also a place where everyone can find a sense of belonging. It is easy to move around, there are places to enjoy for everyone from ages eight to 80. Our history, cultures and stories are embedded into the streets, buildings and places within the CBD. Our story to the world is represented through our iconic CBD vistas and scenes - from New Year's Eve on Sydney Harbour, our iconic skyline to Mardi Gras beginning on Oxford Street. No city in the world comes together to celebrate like Sydney. Even when things are tough - we don our glitter and put on a show.

I am hugely optimistic about the future of the CBD. It has been an attritional and often brutal two years for its businesses and residents, and recovery will take time. However, this report sets out a path to begin to rebuild the heart of our city. It's time to flick the lights back on.

Michael Rodrigues
24-Hour Economy Commissioner
April 2022



INTRODUCTION

Sydney's central business district has been a meeting place for the people of the Eora Nation for at least 30,000 years. The site of the first British penal colony, Australia's first parliament and many of its oldest and tallest buildings, Sydney's CBD holds a special place in the heart of the nation.

A centre of culture and commerce, Sydney's CBD is home to some of Australia's largest companies and is Asia-Pacific headquarters to many multinationals.

Sydney's CBD was an economic engine room prior to the pandemic and 14.5% of the city's workforce headed into the CBD each day.¹ The residential population of 248,736 swelled to around half a million people daily.²

In February 2020, data collection sites monitoring walking activity registered 96,000 weekly movements at Bridge Street in the CBD. At the same time in February 2021 there was a reduction by 46% to 51,200, and a further reduction of 35% to a weekly average of 35,000 movements in February 2022.³ We know for a fact there are just less people walking CBD streets.

This indicates new trends in how people are accessing the CBD. During the pandemic, traffic counters located on a CBD 'gateway' cycleway (George St, Redfern and Liverpool St, CBD) show an increase of cycling during lockdown related to trips taken for commuting, delivery and recreation.⁴

More than \$140 billion in gross domestic product was generated in Sydney's CBD in 2018-2019, and one small 2.8 square kilometre area was responsible for 9.4% of Australia's GDP growth.⁵

Looking back to 2016, the *Tech Startup Action Plan* (2016) cited that \$100 billion was generated each year within the City of Sydney local area, representing more than 7% of Australia's economy and providing more than 437,000 jobs across all skill levels and communities.⁶

1. Terrill et al, Grattan Institute, 2018, p.14
2. The city at a glance, City of Sydney, 2020
3. City of Sydney automated pedestrian count data
4. Transport for NSW Active Transport: Cycling data
5. SGS Economics & Planning, 2019, p.14
6. Tech Startup Action Plan, City of Sydney, 2016, p.14

In 2019 *City of Sydney Economic Future* study by Arup ranked Sydney as sitting just behind major cities like Vancouver, Copenhagen and Dublin as home to globally influential firms, with more than 60% of top innovation technology firms located in Sydney's CBD and Harbour area.⁷

Retail was a major employer of people in the CBD. In 2017, 7,320 retail-related businesses in the City of Sydney accounted for 35.5% of all businesses in the local government area and employed 66,169 workers.⁸

Sydneysiders are proud of their CBD, but there was room for improvement before the COVID-19 pandemic changed the world. In a consumer research survey undertaken by EY in 2016, citizens expressed their "mounting frustrations" with issues such as housing affordability and public transport. They were concerned that infrastructure investment was not keeping pace with the needs of residents, and that the strength of loyalty and pride in their city could, with time, be undermined.⁹ These sentiments were also echoed in research undertaken by City of Sydney which compared community attitudes prior to and during the pandemic, finding that while transport and housing affordability remained top areas of concern, financial hardship as well as a general sense of anxiety about the future displaced concerns about culture and going out as one of the top five issues.¹⁰

The pandemic has now reshaped how people live, where they work, how they value and spend their time and money. It has exacerbated obvious problems and exposed hidden ones. The sense of pride and fond memories of the CBD may remain, but people have recast their definition of a great experience. The CBD is now in an intense battle with other local areas across Sydney.

All cities evolve with the challenges of the era, and COVID-19's challenge to the lifeblood of our city is a chance to reset and reimagine. The CBD will not be the same as it was before COVID-19. Our opportunity is to create something different, but better.

With this in mind, the Office of the 24-Hour Economy Commissioner engaged EY to set in place a program of research to deep dive into how Sydneysiders view the CBD and how they interact with it. Our objective was to benchmark people's perspectives, memories and perceptions of the CBD pre-pandemic. Most importantly, we wanted to understand how Sydneysiders might engage and embrace the CBD in the future.

This research was a rare opportunity to listen to Sydneysiders to understand how their lives have changed and what this means for the CBD. The insights gained can contribute to a strategy that encourages people to return to the CBD, not just once or occasionally, but repeatedly. And not just for work, but for entertainment as well.

"Sydney's CBD - Australia's oldest and largest - remains a source of pride but it wasn't firing on all cylinders before the pandemic. We now have a once-in-a-generation opportunity to reimagine our CBD as something better than it was. To do this we are listening to Sydneysiders from all walks of life. We know our future success depends on creating a true 24-hour CBD with events, activities and experiences that attract people back again and again."

Michael Rodrigues, 24-Hour Economy Commissioner, Investment NSW

While it has been a difficult two years, positive signs point to a bright future for the CBD. Office occupancy levels - an important measure of CBD vibrance - bounced back from 7% in January 2022 to 41% in March 2022, according to the Property Council's Office Occupancy Report. On peak days occupancy in Sydney's CBD increased to 52%, although the low was 23%.¹¹

Investors are continuing to invest in office space. In the last few weeks of 2021, sizeable deals were struck with large institutional investors including ASX100-listed Charter Hall, global investment business Blackstone and Singapore-listed CapitalLand. As *The Australian* noted, these companies are "bullish that Australian offices will be among world leaders in the return to work early next year as low levels of office occupancy start to pick up".¹²

The NSW Government is investing strategically in a range of initiatives, from incentives like 'Dine & Discover' vouchers to long-term placemaking like Australia's greatest urban walking trail along Sydney Harbour foreshore and into the heart of the city. Precincts are also evolving in front of our eyes. The Rocks has been transformed by expansion of alfresco infrastructure in a treasured part of our city. YCK Laneways (bound by York, Clarence and Kent Streets) has been formed to create one of the most exciting small bar districts in the world. Tech Central, on the north-western fringe of Central Station, is poised to become a thriving precinct and together with an already pumping Surry Hills will further position Sydney as a digital and creative hub.

For the CBD to rebuild, collaboration is critical to success. It is only by working together that we will develop better policy, devise better ways of working across all the key players, and deliver better and more creative initiatives that attract people who may not have considered the CBD pre-pandemic.

While this research captures a moment in time, we have a new treasure trove of data with deep insights into people from all over Sydney that can help us shape practical targeted measures, short-term tactics and long-term placemaking moves.

7. Arup, *City of Sydney Economic Future: towards a new cycle*, 2019
 8. City of Sydney, 2022
 9. EY, *How can you build a strong city pulse, without taking the human pulse?*, 2016
 10. City of Sydney, *Community Wellbeing Indicators 2019*

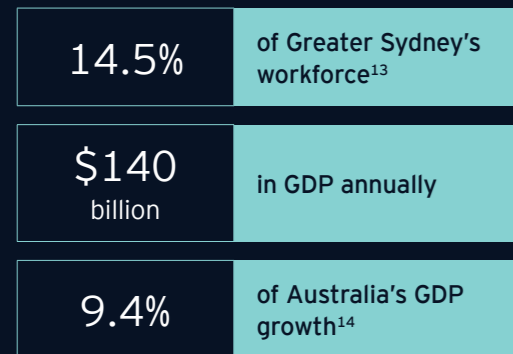
11. Property Council of Australia, April 2022
 12. https://www.propertycouncil.com.au/Web/Content/Media_Release/NSW/2022/Sydney_s_office_occupancy_data_surges_as_workers_flow_back_to_the_office.aspx

EXECUTIVE SUMMARY

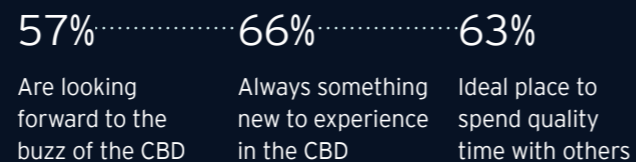
Sydney's CBD has been an economic powerhouse for decades and Sydneysiders are proud of their city's heart. But after two years of staying local, the pandemic has reshaped how people live, how they spend their time and money, and the experiences they gravitate towards.

Sydney's economic engine

Prior to the pandemic, Sydney contributed ...



In late 2021, EY interviewed a representative sample of 3,017 Sydneysiders to understand evolving attitudes to the CBD and the activities and activations that would entice them back. This research, supplemented with wide ranging qualitative research methods including online forums and in-depth interviews, provides a new array of data and insights into how people might engage and embrace the CBD in the future.



Top CBD associations



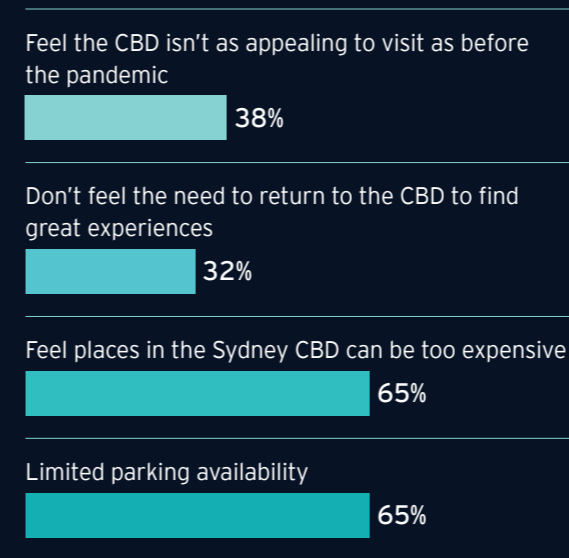
Certain groups - notably younger Sydneysiders, CBD office workers and people who live within 30 minutes of the CBD - are enthusiastic about their return to the city. But make no mistake: the CBD is now in an intense battle with other local areas across Sydney.

Travel restrictions and hybrid working have transformed local areas and high streets into a greater competitive threat to CBD precincts than at any other time in the last three decades. But this 'local area awakening' has polarised Sydneysiders between two extremes: those who say they 'don't feel the need to return to the CBD to find great experiences' (32%); and those who are 'more likely to visit the CBD for activities than they did pre-COVID' (35%).

The CBD had core strengths prior to the pandemic, but it wasn't meeting its full potential. Pre-COVID deterrents now loom larger, especially as people seek affordable and safe experiences. Cost, convenience and availability of parking featured frequently in qualitative feedback. So too did the lack of green space.

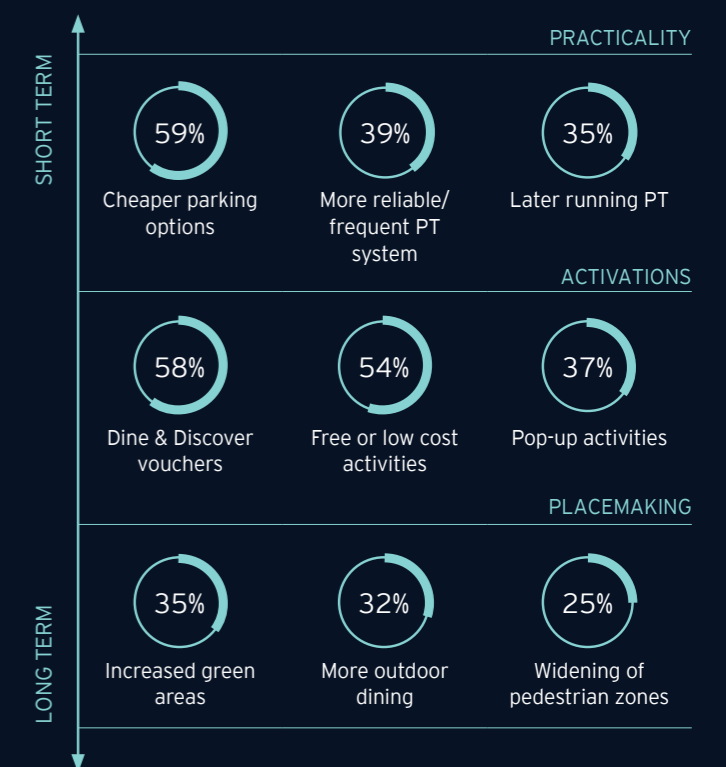
Alongside the established barriers are a host of new ones. The notion of safety has extended beyond social issues and now includes the health risk of being in crowds or busy areas.

Deterrents to CBD visitation



When people were asked which initiatives would bring them back to the CBD, some responses were no surprise and others raised eyebrows. Convenience is important: cheaper and easier-to-access parking and more reliable and frequent public transport are among the top initiatives to re-engage Sydneysiders. However, some of these requirements also necessitate trade-offs. Cheaper parking may exacerbate traffic congestion, for instance, and therefore may not be desirable.

Initiatives



But once the baselines of parking, public transport, cleanliness and safety in the streets are stripped out, the top initiatives are more intriguing, and include dining incentives and alfresco areas, more green space and pop-up activities.

While there is no one solution to rebuilding Sydney's CBD, the report proposes several ideas and initiatives to be considered by NSW Government and other policy makers. The report also highlights opportunities for businesses to re-engage and attract people back to the CBD.

Recommendations

Our challenge is to reframe the narrow or dated perceptions that stop Sydneysiders from rediscovering their CBD.

Our opportunity is to shine a light on the multiplicity of sub-brands within the CBD for the many audiences looking for new and unexpected experiences. In doing so we will flick the switch on a new era for Sydney.

Placemaking and planning

- 1 Establish more alfresco infrastructure and access to green, calm spaces
- 2 Expand parklets and make temporary use of road space for hospitality businesses and pop-up events
- 3 Forge collaborations between state and local government, the property sector and arts and cultural institutions to host activities, like art shows, live performances or theatre
- 4 Investigate ways to ensure affordable price points for food and beverage are maintained as part of the post-pandemic tenant mix
- 5 Consider creative and flexible use of building space to maximise capacity and create new business opportunities

Creating demand

- 1 Extend the deadline for Dine & Discover, Stay & Discover and other related vouchers to at least 31 December 2022
- 2 Expand the range of 'Discover' activities that can be redeemed or offer additional vouchers for off-peak times
- 3 Trial a 'culture pass' for venues and institutions across Sydney
- 4 Enhance and expand the Sydney Pass iVenture Card to include a wider range of offerings for visitors
- 5 Consider new offerings as demand drivers for the CBD (e.g. 24-hour food market and new major e-gaming venue)
- 6 Incentivise contractors, participants in the 'gig-economy' and others to work from the CBD with discounts on CBD co-working spaces
- 7 Fund targeted audience engagement using a combination of traditional, non-traditional media and influencers to reinforce the 'specialness' of the CBD

Activating the city

- 1 Build on the \$50-million CBDs Revitalisation Program and the ELEVATE Sydney festival by using existing infrastructure and outdoor space for events
- 2 Use major events to encourage visitors to stay longer in the CBD
- 3 Develop activities that target young people and people with families to come into the city for non-work
- 4 Trial a 'City Camp' program for primary and secondary school students and community sports clubs to encourage young people to get to know and be excited by what the city has to offer
- 5 Develop a strategic approach to events that emphasises sustained activation, which could be achieved with precinct activation campaigns that highlight the unique 'personalities' of place

Mobility and access

- 1 Consider options to encourage ridership on public transport, including subsidised annual travel passes and later night running of services
- 2 Resist the call to increase parking amenities within the CBD or to subsidise parking within the city, as public transport participation rates will improve with time
- 3 Trial micro-mobility and shared e-scooters on active transport infrastructure to quickly dissipate crowds
- 4 Invest in additional active or 'light' transport corridors, e.g. connecting Green Square to the City
- 5 Urge employers to offer and promote flexible working hours to relieve congestion on public transport and encourage the development of employment packages that include subsidised public transport travel
- 6 Consider 'hot offices' with subsidies that encourage employees to access CBD work locations or shared workspaces with free access to fast Wifi, an affordable lunch and quiet workspaces
- 7 Trial late public transport running Thursday to Saturday nights to provide easier and more cost-effective transport for young people and hospitality workers

Licensing and regulation

- 1 Explore the potential for more late-night licences in particular districts
- 2 Consider further alignment of planning legislation for small bars to align development consent with trading hours
- 3 Develop a shared position on sound policy specifically to provide a definition of 'offensive noise'
- 4 Streamline planning and licensing to support ongoing efforts to activate institutions such as libraries, museums, warehouses and carparks for different uses, like dance parties
- 5 Make lower-cost retail like pop-up shops, swaps and market activations easier and more cost-effective to establish

*Please refer to the recommendations section and appendix for further detail on these opportunities.

OVERVIEW

In late 2021, EY interviewed a representative sample of 3,017 Sydneysiders to find out how their attitudes to Sydney's CBD had changed since the beginning of the COVID-19 pandemic and the activities and activations that would entice them back.

While this research was undertaken before the Omicron outbreak in December 2021, the findings remain relevant to the long-term future of the CBD.

The research included Sydneysiders aged over 18 years of age, living within Greater Sydney and who had spent time in the Sydney CBD for work or leisure at least once each year prior to the COVID-19 pandemic.

The research was also supplemented with a wide range of qualitative research methods including online forums and in-depth interviews to add additional colour and insight to the hard data. This component of the research was mostly conducted with adults aged over 18 with some of the in-depth interviews conducted with younger adults aged between 14-17 years.

For a breakdown of the respondent profile included in the survey, please refer to Appendix 1.

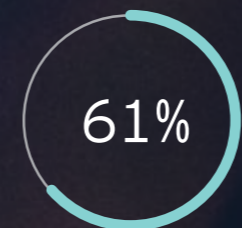
Alongside the research with Sydneysiders, we have also engaged with key representatives from the property, hospitality, entertainment, culture and retail sectors, City of Sydney, NSW Government and other leading thinkers to explore how to reinvigorate the Sydney CBD. Throughout this report, we have also shared some case studies on different approaches that are re-shaping engagement with specific precincts.

LIFE REDEFINED

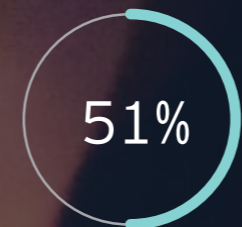
Sydneysiders are proud of their CBD as a showcase, a special occasion destination and a place of discovery and exploration. But after two years of predominantly staying local, the pandemic has reshaped how people live, how they spend their time and money, and the experiences they gravitate towards.

According to EY's Future Consumer Index research, more than half (54%) of all Australians say the pandemic has changed their lives "significantly", from how they work and socialise, to how they travel, shop, dine and enjoy leisure time. People have new perspectives on time and space. Six in 10 Australians say they plan to be more cautious of their spending in the future than they were pre-pandemic. A third say they are less inclined to choose experiences outside the home because of health and safety concerns. And half (50%) say their values and outlook on life have changed.¹⁵

Key statistics



of those who live in NSW are thinking about the future and what's important to them



say COVID-19 changed the way they look at life

"I have realised that I spent money on things I didn't need. I purchased a lot of beauty products even though I hardly wore them. This time has shown me that I don't actually need as many clothes as I am finding myself wearing similar things most days."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

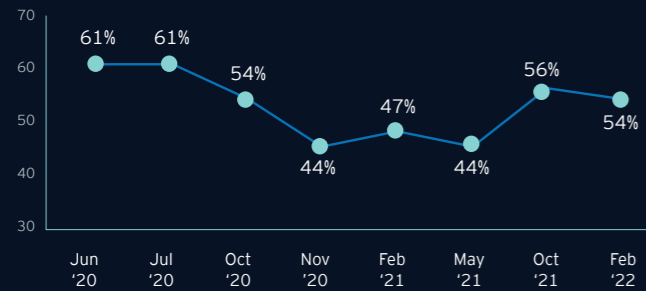
"Like everyone else, I've developed lots of habits to be cautious and mindfully aware of people surrounding me, and purposefully avoiding them to maintain social distancing."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

15. EY, Future Consumer Index, February 2022

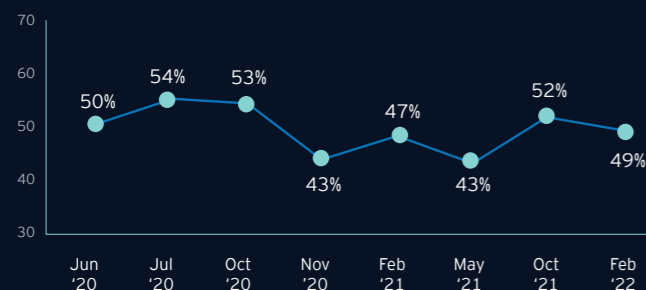
Life has changed¹⁶

Agree/strongly agree that the way they live has significantly changed since before the pandemic



Long term changes expected¹⁶

Agree/strongly agree that their life will significantly change in the long-term as a result of the pandemic



Changes in behaviour¹⁵

I have become more used to cooking at home



I am more comfortable in my own skin, without the need for beauty products or cosmetic enhancements



I feel less pressure to keep up with the latest fashion trends



I am more likely to repair things than replace them



I feel less pressure to keep up with the latest gadget and technology trends



Brands have become less important in all my purchase decisions



It has made me realize I have more clothes than I really need

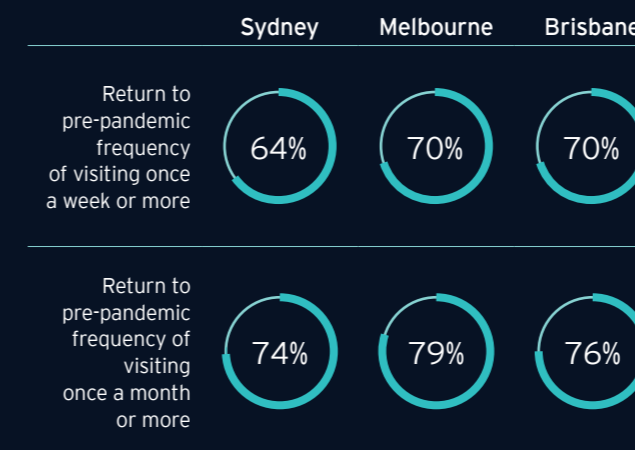


I am buying more things because it makes me feel happy



EY's most recent edition of the Future Consumer Index survey shows that Australians intend to return to their state's major city CBD less frequently in the next six months than they did pre-pandemic.¹⁷ Prior to the pandemic, around 35% of Australians were visiting their local CBD at least once per week with 45% visiting at least monthly. In six months' time, it is likely that more than two-thirds of these pre-pandemic visitors will return to the city at least once per week and more than three-quarters plan to return at least once per month.

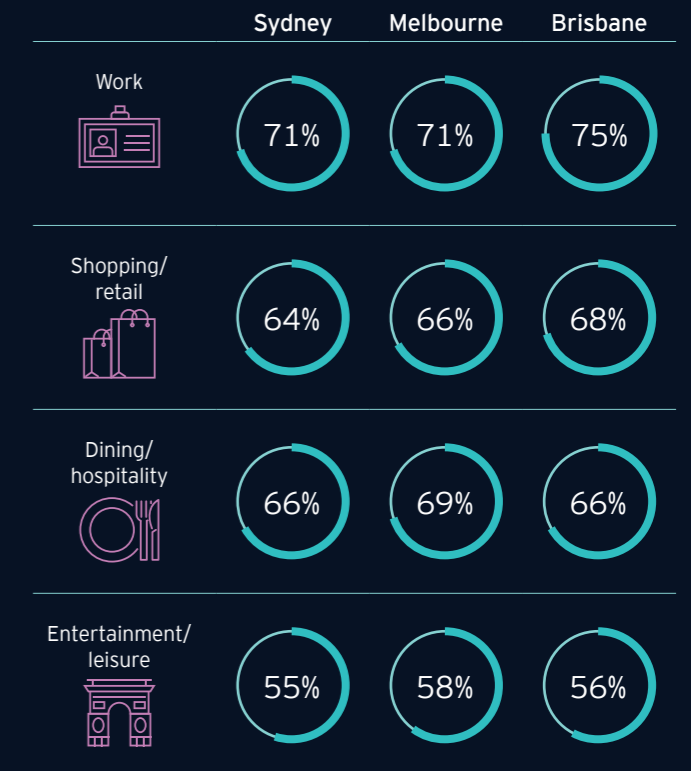
Intention to return to pre-pandemic visitation frequency (in six months' time)



While work will remain the key reason for high frequency visits to the CBD in the near future (63% of those who visited the CBD at least weekly plan to return to the CBD on a weekly basis in six months' time), dining and hospitality, shopping and retail will also drive high levels of revisitation on a monthly basis.

Intention to return to pre-pandemic visitation frequency (in six months' time)

Proportion who will continue to visit once a month or more



This suggests that while Australians are still attracted to their CBD, it also underscores a nationwide challenge. People are not planning to head into the city with the same frequency they once did.

In Sydney, travel restrictions during the pandemic forced many people to rediscover their local areas. As hybrid workplaces support more people to work from home, at least for some part of each week, local areas and high streets have become a much bigger competitive threat to CBD precincts than at any other time during the last three decades.

The 'local area awakening' has de-positioned the CBD in the minds of many, but not all, Sydneysiders. Responses are polarised between two extremes: those who say they 'don't feel the need to return to the CBD to find great experiences' (32%); and those who are 'more likely to visit the CBD for activities than they did pre-COVID' (35%).

Positive and negative perceptions

"The vibe of the city is really special... different kinds of people, entertainment, food ... I think that's really cool."
Age 25-34, no children, lives less than 30 minutes from CBD, works in CBD

"It's a central meeting point... you can just get a train to the CBD and meet up."
Age 18-24, no children, lives more than 30 minutes travel time to the CBD, does not work in the CBD

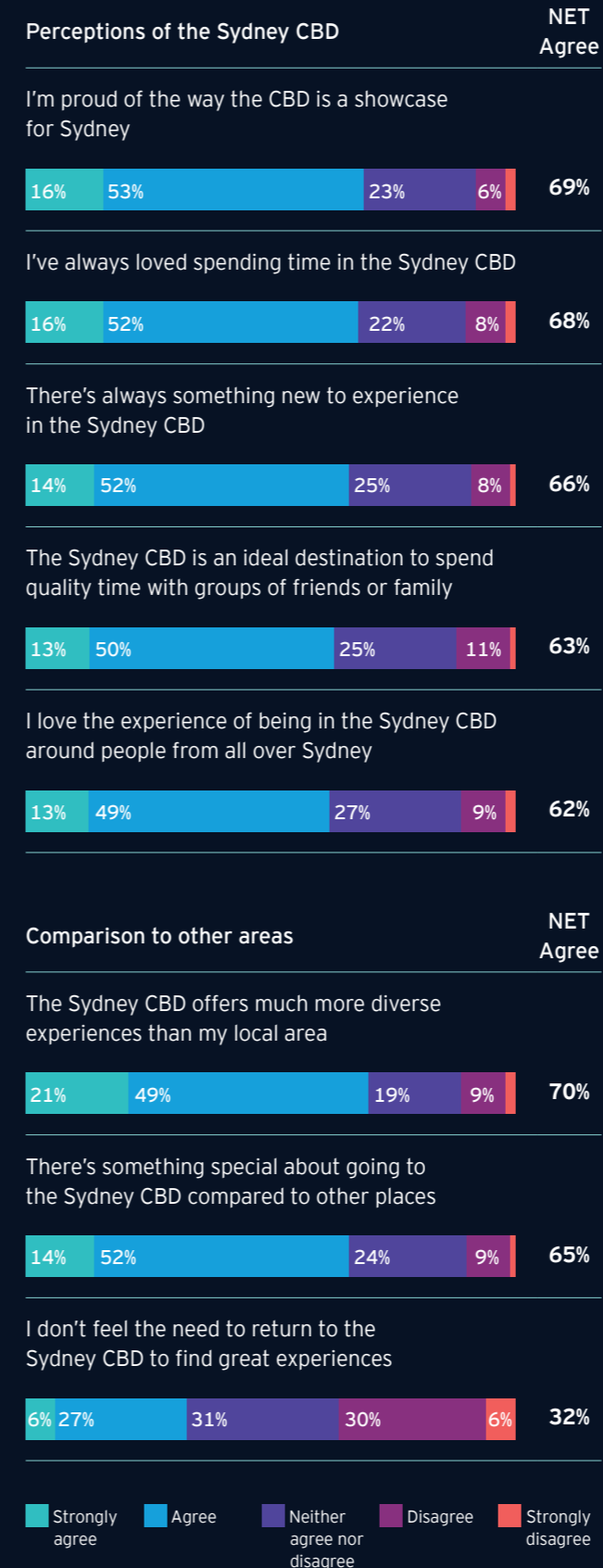
"There are a lot of premium and boutique stores that are a bit expensive and don't offer deals. It's not attractive to me."
Age 45-54, has children, lives more than 30 minutes travel time to the CBD, does not work in the CBD

"Some people might not go to the CBD because they can't get home if trains don't go past midnight. Not everyone can afford taxi rides to get home."
Age 25-34, no children, lives less than 30 minutes from CBD, does not work in the CBD

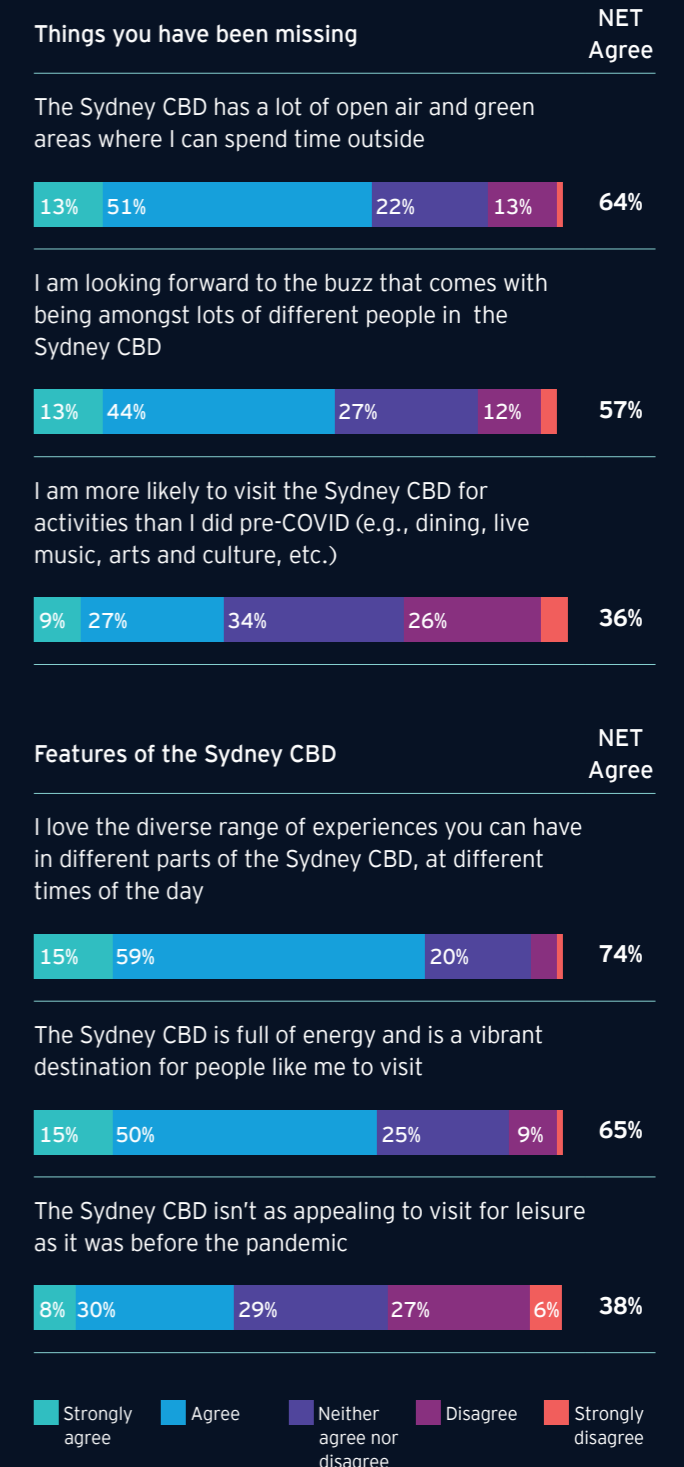
Why did people visit the CBD pre-pandemic?

Work	14.5% of Sydney's workforce headed to the CBD for work each weekday prior to the pandemic. ¹⁸
Arts and culture	With the Sydney Opera House, Sydney Theatre Company, Art Gallery of NSW, Museum of Contemporary Art and more, the CBD was a culture magnet.
Pitt Street Mall	The open-air shopping experience attracted shoppers looking for high-end and luxury labels.
Dining experiences	With high quality restaurants and unique bars, the CBD was well positioned for special occasions and experiences.
Signature events	Spacious parks and generous open plazas made the CBD the natural home for festivals, parades and pop-up events.

Attitudes towards the Sydney CBD



Sentiment towards the Sydney CBD



A TIME FOR REDISCOVERY

The COVID-19 pandemic presented opportunities for people to reflect and reimagine their lives. Now, as we emerge from lockdowns and adjust to the 'new normal', our city centre can be a place of re-awakening and rediscovery.

Positively, two in five Sydneysiders (39%) are very or extremely excited to revisit the CBD. Two in three (65%) say there is something special about the CBD, and 70% agree that it offers much more diverse experiences than their local area.

"I think just the general experience [of the CBD] is so much more attractive to me. You could do the exact same thing for two days but have completely different experiences just because of the amount of diversity and the different people you can meet. Whereas, sometimes in suburban areas things can feel a bit repetitive, but I never seem to get that feeling in the CBD."

Age 18-24, no children, lives less than 30 minutes from the CBD, works in CBD

"There are a lot of other suburbs around the CBD and where I live that have great restaurants and bars ... accessibility for me and my friends is a consideration - suburban areas can sometimes be better with the high chance of being able to park if driving."

Age 18-24, no children, lives less than 30 minutes from the CBD, works in CBD



of Sydneysiders excited about visiting the CBD ...



Are looking forward to the buzz of the CBD

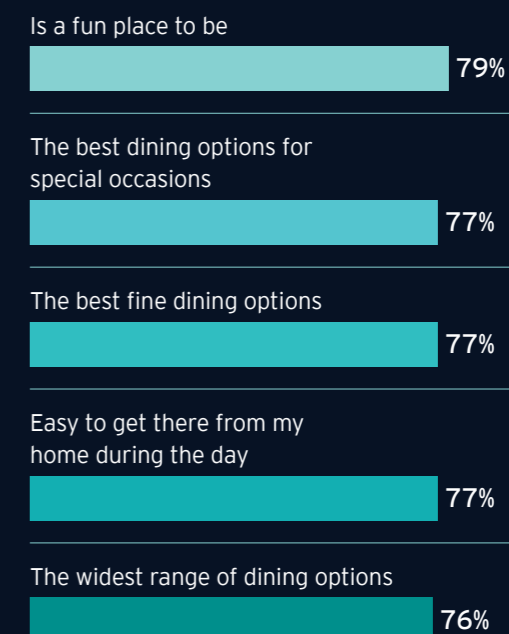


Always something new to experience in the CBD



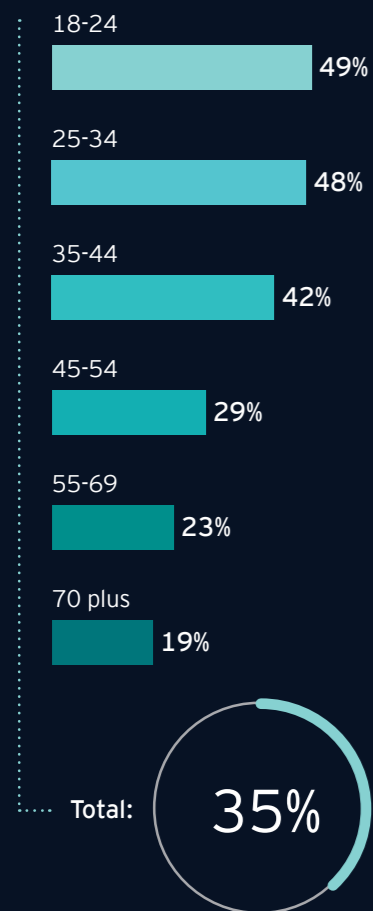
Ideal place to spend quality time with others

Top CBD associations

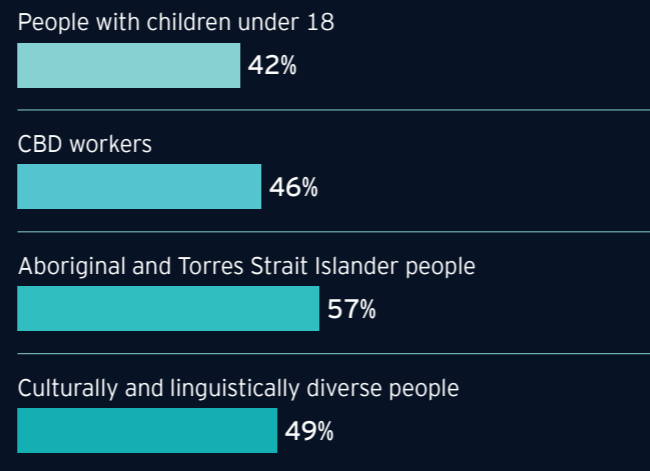


Enthusiasm for the CBD is significantly higher among younger Sydneysiders, who stated that they are more likely to visit the CBD than they did pre-COVID.

Now and then: Who is more likely to visit Sydney's CBD for activities than pre-COVID?



Other groups more likely to return

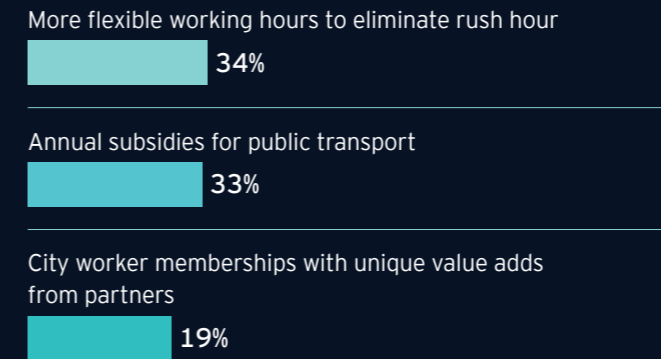


The response from CBD office workers is heartening, as this segment of Sydneysiders says it is significantly more likely to visit the CBD for cultural activities than pre-COVID. Office workers are keen to re-immense themselves in the buzz of the city, but they are looking for workplaces and experiences that are worth the commute.

"I'd like to return to the office to see people and catch up - I miss those interactions! Team bonding events and company events will certainly encourage people to come in."
 Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

"I miss it and would love for it to come back - I definitely won't hold back once we are allowed."
 Age 18-24, no children, lives less than 30 minutes from the CBD, works in CBD

What would encourage office workers back in?



The CBD undoubtedly faces stiff competition from areas closer to home. Prior to the pandemic, the CBD was positioned strongly for the best fine dining, bars and culture. It remains the preferred option for special occasions and high-end shopping. However, local areas have the trump card of convenience as well as being places to connect with other local people.

"It's a central meeting point for me and my friends - we all live quite spread out across Sydney and it's [the CBD] really easy... you can just get a train to the CBD and meet up."
 Age 14-17, lives less than 30 minutes from the CBD, does not work in CBD

Top five strengths and weaknesses

The CBD is the best place for ...

- 1 Fine dining options
- 2 Experiencing the arts
- 3 Special occasion dining
- 4 Access to the best range of bars
- 5 High-end shopping

My local area is the best place for ...

- 1 Easy access from my home at night
- 2 Easy access from my home during the day
- 3 Relaxation
- 4 Value for money
- 5 Everyday shopping, green areas and natural spaces

The CBD's biggest weaknesses are ...

- 1 Lack of shops for everyday items
- 2 Poor value for money
- 3 Few green areas and natural spaces
- 4 Hard to get home at night
- 5 Not a relaxing place to be

My local area's biggest weaknesses are a lack of...

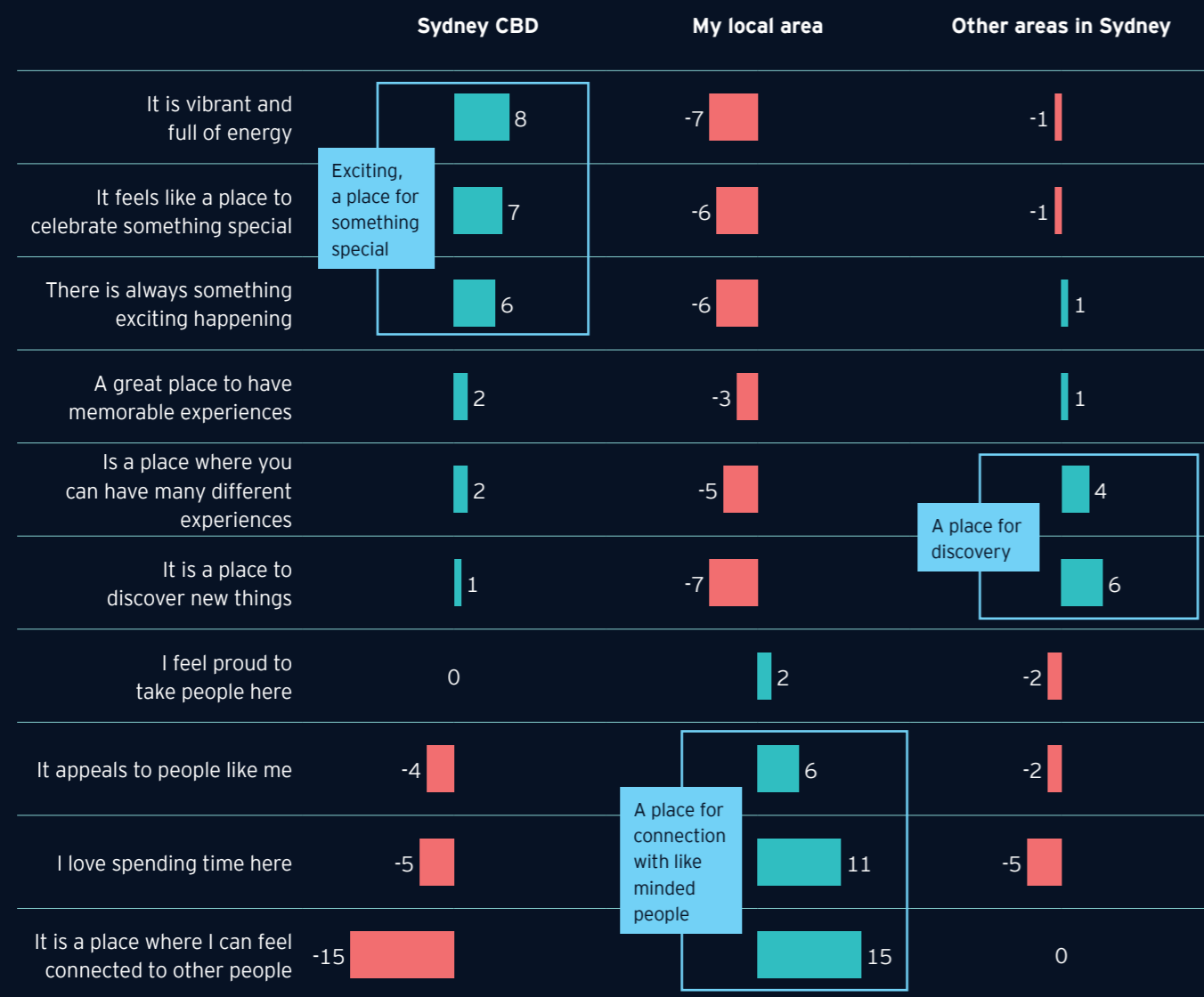
- 1 Places to experience the arts
- 2 The best high-end shops
- 3 Theatre or arts venues
- 4 Fine dining options
- 5 Access to the best live events

See Appendix 3 for a graphical representation of these strengths and weaknesses.

The CBD is currently a place of occasion and experience. While local areas aren't always vibrant, exciting or places for new or memorable experiences, they are places where people can feel connected to others.

This is arguably the biggest opportunity for Sydney's CBD - to amplify its place in the city as a connector, not just as a physical meeting place but as a foundation for diverse, inclusive and connected communities.

Experience perceptions by area



Strengths of Sydney's CBD (when compared to suburban areas)

DIVERSITY

"The vibe of the city is really special. There's lots of areas that are really different, different kinds of people, different kinds of entertainment, different food, a different vibe ... I think that's really cool."

Age 14-17, lives less than 30 minutes travel time from the CBD, does not work in CBD

UNIQUE DINING EXPERIENCES

"Most of my trips to the CBD were leisure - we'd be going to something or seeing something... [I'm] attracted to bars that have some sort of novelty."

Age 20-29, Identifies as Aboriginal or Torres Strait Islander (ATSI), has children, lives 30 minutes or more from the CBD, does not work in CBD

ACCESSIBILITY AND DIVERSITY

"I want somewhere easily accessible and look for something I haven't experienced before ... new cuisines, new restaurants, new locations. I think the CBD often has a lot more to offer in terms of accessibility and new experiences when compared to suburban areas."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

ICONIC VIEWS AND SCENERY

"You have some really good places with good views - you don't have that in the Inner West."

Age 30-39, Culturally and linguistically diverse person (CALD), no children, lives less than 30 minutes from the CBD, works in CBD

"The key aspects I consider are ease of access and variety of offering. For example, I try to avoid driving around Sydney when I can, so it appeals to me that I can easily get to the Sydney CBD by walking or train or ferry. I also like that the CBD has a lot of different shopping choices on offer from Westfield to QVB and Pitt Street Mall. There are also so many different bars and restaurants to choose from which you can easily walk to."

Age 30-49, no children, lives less than 30 minutes from the CBD, does not work in CBD

CONVENIENT PLACE TO MEET

"It's still a convenient place to catch-up with my friends, mostly during the week as people are around there."

Age 20-29, CALD, no children, lives less than 30 minutes from the CBD, works in CBD

"It's hard to imagine not going there at all. Even if I don't work there, I'd still go there to catch up with my friends on weekends or on Fridays."

Age 30-39, CALD, no children, lives less than 30 minutes from the CBD, works in CBD

UNIQUE PRECINCTS

"I like that the CBD has so many unique precincts all with a different vibe and offering. You have The Rocks, Circular Quay, Pitt Street Mall, Darling Harbour and Barangaroo."

Age 30-49, no children, lives less than 30 minutes from the CBD, does not work in CBD

SPECIAL OCCASION EVENTS

"There's an enhanced feeling of 'going out' when you head into the city rather than the local pub."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

Strengths of suburbs (when compared to the CBD)

CONVENIENCE

"Staying local is generally more convenient for me than travelling to the CBD... for me, the CBD is treated as a bit of a special occasion (often for birthdays etc.)."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

GREATER COVID CONCERNS IN CBD

"Once restrictions ease, I would still be more inclined to visit local bars around my area to avoid crowds etc. and the risk of going into another tough lockdown."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

MORE CASUAL EXPERIENCES

"I do prefer quieter pubs like at Balmain or Surry Hills. I think pubs and restaurants in local areas can be a bit more relaxing than the CBD ... I don't have to dress up!"

Age 30-49, no children, lives less than 30 minutes from the CBD, does not work in CBD

LESS CROWDS

"The older I get, the less I like crowds and I hate lining up for anything. So for example, if I'm just going to the movies alone I would prefer to go to Fox Studios to avoid the crowds."

Age 30-49, no children, lives less than 30 minutes from the CBD, does not work in CBD

INSUFFICIENT PUBLIC TRANSPORT TO SUPPORT NIGHT LIFE

"Sydney is quite spread out... some people might not go to the CBD because they can't get home if trains don't go past midnight. Not everyone can afford taxi rides to get home."

Age 25-29, CALD, lives less than 30 minutes from the CBD, works in CBD

MORE AFFORDABLE

"The CBD can learn from other suburban areas to be more affordable."

Age 18-24, no children, lives 30 minutes or more from the CBD, works in CBD



PERCEPTIONS & PROXIMITY

What makes the CBD a magnet depends on where people live. The perception of the CBD improves with proximity. Conversely, enthusiasm for the CBD tapers as the resident radius widens. This suggests activities and offerings that appeal to Sydneysiders from suburbs closest to the CBD will be most successful.

People who live 30 minutes or more from the CBD are most concerned about catching public transport in a post-pandemic landscape and the time it will take to commute to the CBD for work.

"I think I'd still have to use the train to get into the CBD given how far away I live, but at the moment I'm not really comfortable taking that option."

Age 30-49, has children, lives 30 minutes or more from the CBD, does not work in CBD

"I wouldn't want to go on public transport at this time."

Age 30-49, has children, lives 30 minutes or more from the CBD, does not work in CBD

"The travel time is my biggest concern - pre-pandemic traffic was out of control... when you add two-plus hours per day for travel you become resentful of the loss of your time."

Age 30-49, has children, lives 30 minutes or more from the CBD, does not work in CBD

For people who live more than 30 minutes away from the CBD, these new concerns are compounded by pre-existing deterrents, notably the expense of public transport. This is particularly the case for people with children.

"[I] usually drive and park in Darling Harbour as it's cheaper. I haven't caught a bus in years... If I'm going in with my family, it's cheaper to drive."

Age 30-49, has children, lives 30 minutes or more from the CBD, does not work in CBD

"I would drive and pre book Wilson Parking to save money. However, with added toll costs on M4 and M5 splitting into the M8, I would probably avoid the city entirely nowadays."

Age 18-24, no children, lives 30 minutes or more from the CBD, works in CBD

There is also a group of Sydneysiders who live 30 minutes or more from the CBD who now perceive it to be too far away and too much effort.

"Prior to the pandemic, going to the CBD was fairly easy - hop on the light rail and I was there within an hour. Now the CBD seems so far away and out of reach. I feel less connected to it because of the lack of connection and because I haven't been into the CBD for quite a while."

Age 30-49, has children, lives 30 minutes or more from the CBD, does not work in CBD

"If it takes more than an hour of travel, it would have to be a big reason to make the trip for myself, these days."

Age 30-49, has children, lives 30 minutes or more from the CBD, does not work in CBD

Conversely, those less than 30 minutes away perceive the CBD to be a much more convenient and accessible destination.

"A good core meeting place for friends."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

"It's [the CBD] very important - it's one of the main areas where I catch up with my friends as it's a mid-point for many of our locations."

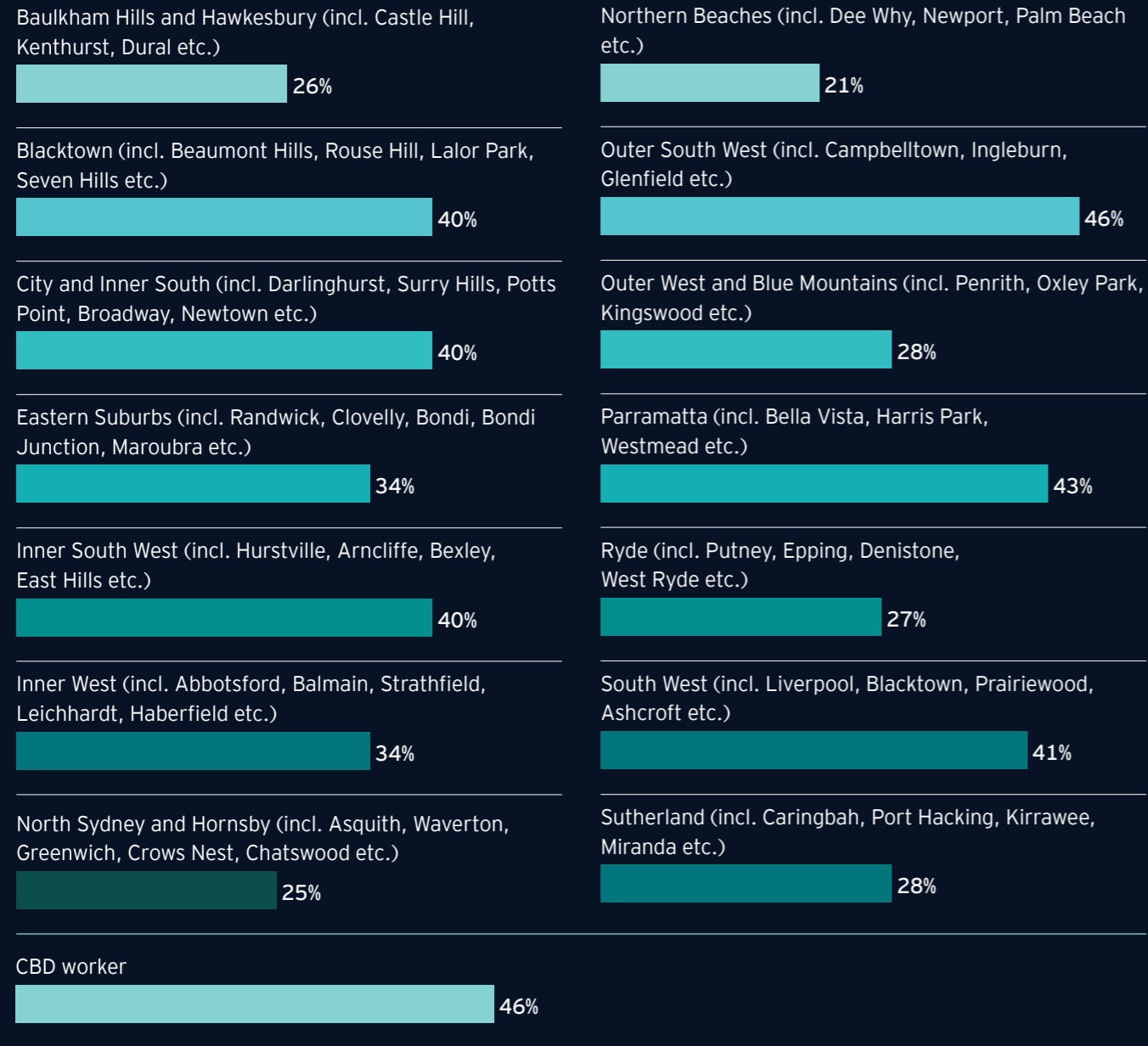
Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

"The CBD is fairly important - I live quite close and it's a short bus or tram ride into the city for meals, theatre shows, cinemas and shopping, and it's a convenient meeting point for my friends and I."

Age 30-39, no children, lives less than 30 minutes from the CBD, does not work in CBD

Enthusiasts for the Sydney CBD

I am more likely to visit the Sydney CBD for activities than I did pre-COVID (Agree / Strongly agree)



The CBD is positioned the strongest perceptually for special occasions and experiences. But COVID has changed the competitive set – and feeling safe, relaxed and within a short distance of home is more important than it once was. As one respondent noted: “I don’t think anything can ‘substitute’ the CBD, but I think people are opting for their own local areas to support small businesses at the moment.”

People are saying loud and clear: “We don’t need to travel into the CBD for casual dining, to catch up with friends and family, or to spend time in natural or green spaces when we can do this so close to home and at less cost.”



DETERRENTS OLD & NEW

Old obstacles loom larger in the new normal

CULTURE

"There are lots of museums in the city, but they almost act like old dusty libraries that nobody visits."

Age 45-54, children, lives more than 30 minutes from the CBD, does not work in CBD

SAFETY

"I don't like the CBD at night - it's not even late but you meet so many strange people yelling at you..."

Age 35-44, children, lives less than 30 minutes from the CBD, does not work in CBD

PUBLIC TRANSPORT

"Transport should operate for longer and people should be able to rely on it."

Age 25-34, no children, lives more than 30 minutes from the CBD, works in CBD

AFFORDABILITY AND ACCESSIBILITY

"All the places with the best views and in the best locations are too touristy and you can't afford them."

Age 35-44, children, lives less than 30 minutes from the CBD, works in CBD

INCLUSION

"It would be really good if they took a stance to involve Indigenous culture. At the moment they do just enough not to get told they're doing nothing."

Age 25-34, children, lives more than 30 minutes from the CBD, does not work in CBD

The CBD had core strengths prior to the pandemic, but it wasn't meeting its full potential.

Pre-COVID deterrents now loom larger, especially as people seek affordable and safe experiences. The cost and convenience of the CBD remains one of the biggest barriers, with the expense and availability of parking frequently featuring in qualitative feedback.

The lack of late-night entertainment plays a particularly prominent role in deterring younger Sydneysiders and CBD workers. Illustrating this, more than a third (37%) of 25-34-year-olds (24% among all Sydneysiders) believe places in Sydney's CBD close too early.

The lack of green space is another obstacle. While green space doesn't drive visitation, it does play a role in deterring 43% of Sydneysiders from the CBD. This criticism of the CBD is more pronounced among older residents who align the best green spaces with their local area. We know that 'outdoor' and 'green' have become more important to people through the pandemic and it is a critical dynamic as the CBD is redefined into the future.

Research undertaken by MIT's Real Estate Innovation Lab in 2021 found an

8.9% to 10.5%

"statistically, economically and positive transaction premium" for offices with high street-level greenness.

These buildings also realised a 5.6% to 7.8% rental premium.¹⁹

Alongside the established barriers are a host of new ones. The notion of safety has extended beyond social issues and now includes the health risk of being in crowds or busy areas. The shift to working from home, coupled with a growing appeal for local areas, has also taken some of the gloss off the CBD.

19. Yang et al, The Financial Impact of Street-Level Greenery on New York Commercial Buildings, July 2021

COVID-19 measures and mandates

54% want COVID-19 vaccination mandates to remain

61% want visible reinforcement of COVID-19 measures

New variants of COVID-19 point to the need for a prevailing health and safety 'halo' over the city for some time to come.

What features will draw and deter people in the future?

The collective challenge for governments, asset owners, employers, community groups, hospitality and retail businesses is to dismantle the biggest barriers while also dialling up the pull factors that will entice people back in greater numbers and frequency.

Obstacles are opportunities

- ▶ **Financially exclusive:** High-cost retail and hospitality make the CBD less appealing to low-income households and those whose budgets may have been hit by the pandemic.
- ▶ **'Bigger' occasions only:** Sydneysiders can see the CBD as a place of luxury, prestige and high-end hospitality, making them more likely to reserve the CBD for special occasions.
- ▶ **Business focused:** People feel existing CBD offerings, with limited opening hours and weekday operations, are focused on corporate office workers.
- ▶ **Unreliable transport:** While the CBD is acknowledged as Sydney's central hub and an accessible meeting point, public transport is perceived as infrequent, unreliable and unsupportive of late-night visitation.
- ▶ **Tourist trap:** The CBD is a place where people from all walks of life can come together, but high prices set for tourism can alienate locals considering cost, convenience and places tailored to their needs.

PERSONALITY & THE POWER OF PRECINCT

To experience Sydney's CBD is to peer through a kaleidoscope. Each precinct and pocket of the city is the backdrop for an endless series of small experiences or fleeting moments that evolve with the time of day or night. Just one tiny twist of the kaleidoscope and Sydney's CBD looks different. And like a prism held to the light, each person sees the CBD through a unique set of eyes.

We know the personality of each precinct - and people's perceptions of that - are important. Sydneysiders are, in general, positive about each precinct in the CBD. Not one area rated below a respectable 7.6 out of 10 for experience.

But Chinatown is favoured for casual dining and value for money, while Barangaroo, The Rocks and Circular Quay offer the best special occasion dining experiences. Sydney's actual CBD is known for its shopping and cultural activities, rather than casual dining or a special occasion. YCK has a strong association with casual dinner and drinks with work colleagues. Darling Harbour is seen as a place to discover something new - whether that's a major event or a pop-up attraction. The Rocks is favoured as a place to spend time with family.

How do Sydneysiders rate each CBD precinct?

Visitation and experience - Sydney CBD overall, individual CBD precincts, other areas of Sydney and local area (% proportion of respondents who visited each precinct in the last few years)

		Avg.
My local area	100%	8.1
Other areas of Sydney (excluding Sydney CBD)	100%	7.8
Sydney CBD overall	100%	8.3
Circular Quay	80%	8.5
Darling Harbour	78%	8.5
Sydney CBD (excl. other areas listed)	72%	8.3
The Rocks	67%	8.6
Barangaroo (incl. King Street Wharf)	59%	8.7
Chinatown	52%	7.8
Surry Hills, Darlinghurst, Kings Cross, Potts Point areas	48%	8.2
Pyrmont (excl. Darling Harbour)	42%	8.1
YCK Laneways (York, Clarence, Kent Streets precinct)	33%	7.6

Occasion associations for future visits by precinct

<p>SYDNEY CBD</p> <ul style="list-style-type: none"> ▶ To spend the whole day undertaking different activities ▶ To shop at boutique/independent shops ▶ To shop at the best high-end shops ▶ To shop at a range of clothing and fashion shops ▶ For cultural activities ▶ For major special events/activations 	<p>SURRY HILLS, DARLINGHURST, KINGS CROSS, POTTS POINT AREAS</p> <ul style="list-style-type: none"> ▶ To shop at boutique/independent shops ▶ Casual drinks with work colleagues ▶ For a casual dinner ▶ To go to nightclubs ▶ For live music and entertainment 	<p>THE ROCKS</p> <ul style="list-style-type: none"> ▶ To visit iconic Sydney landmarks ▶ Fine dining for lunch or dinner ▶ To discover something new ▶ For cultural activities
<p>YCK LANEWAYS (YORK, CLARENCE, KENT ST PRECINCT)</p> <ul style="list-style-type: none"> ▶ Casual drinks with work colleagues ▶ Casual meal with work colleagues 	<p>PYRMONT</p> <p>Pyrmont is not strongly aligned to any occasion associations, but has the potential to be known for:</p> <ul style="list-style-type: none"> ▶ Casual drinks with colleagues ▶ To go to nightclubs ▶ To spend the whole day undertaking different activities ▶ Live music and entertainment 	<p>DARLING HARBOUR</p> <ul style="list-style-type: none"> ▶ To visit great attractions ▶ To do something with the family ▶ For major special events/activations ▶ To visit iconic Sydney landmarks
<p>CIRCULAR QUAY</p> <ul style="list-style-type: none"> ▶ To visit iconic Sydney landmarks ▶ For cultural activities ▶ Fine dining for lunch or dinner ▶ To visit great attractions 	<p>BARANGAROO</p> <ul style="list-style-type: none"> ▶ Fine dining for lunch or dinner ▶ For a special occasion ▶ To discover something new 	<p>CHINATOWN</p> <ul style="list-style-type: none"> ▶ Casual meal with work colleagues ▶ Casual meal with friends and family ▶ For a casual dinner ▶ For a casual lunch ▶ To bring together family and friends who live in different areas

There are also practicalities that drive people's decisions to visit the CBD. It may be easy to get home from Circular Quay or YCK at night if you live on the lower North Shore, but not Surry Hills, for example. Similarly, if you live in Bondi, Surry Hills will be easy to get to and from, but Pyrmont may not be. Depending on the occasion, people select the precinct based on a range of criteria: accessibility, the home base of the people they are meeting and the travel route; followed by dining appeal; vibrancy and open-air space.

But the message is clear: A one-size-fits-all reactivation strategy can't be applied to the entire CBD. One opportunity is to create sub-brands within the CBD.

Precinct perceptions

<p>GEORGE STREET</p> <p>"The light rail is good because it makes that huge space right in the middle of the city... a large walking area which is always full."</p> <p>Age 45-54, children, lives less than 30 minutes from CBD, does not work in CBD</p>	<p>DARLING HARBOUR</p> <p>"We went there once. They had music playing, we saw some friends, played in the playground."</p> <p>Age 35-44, children, lives more than 30 minutes travel time to the CBD, works in CBD</p>
<p>WYNYARD</p> <p>"Wynyard has all the fancy bars..."</p> <p>Age 18-24, no children, lives less than 30 minutes from CBD, works in CBD</p>	<p>CENTRAL CBD</p> <p>"Lots of big high rises that are businesses... nothing to spark interest."</p> <p>Age 45-54, children, lives more than 30 minutes travel time to the CBD, does not work in CBD</p>
<p>PITT STREET MALL</p> <p>"We used to go there at Christmas for the David Jones window displays - it was a novelty event."</p> <p>Age 55-64, no children at home, lives more than 30 minutes travel time to the CBD, does not work in CBD</p>	<p>SURRY HILLS, DARLINGHURST AND POTTS POINT</p> <p>"Oxford Street is unique with all its op shops and diversity of people."</p> <p>Age 25-34, no children, lives less than 30 minutes from CBD, does not work in CBD</p>
<p>CIRCULAR QUAY</p> <p>"You have some really good places with good views - you don't have that in the Inner West."</p> <p>Age 35-44, children, lives less than 30 minutes from CBD, works in CBD</p>	<p>HAYMARKET AND CHINATOWN</p> <p>"Dinner in Haymarket is always good - if we stay at the Green Southern then we go to Haymarket with all the Asian restaurants."</p> <p>Age 55-64, no children, lives more than 30 minutes travel time to the CBD, does not work in CBD</p>

OPERATING IN THE NEXT PHASE OF THE PANDEMIC

When people were asked about future visits to the CBD, COVID-19 was an obvious concern, reflecting that visible and transparent efforts around safety and hygiene are important to people.

Travelling on public transport is the biggest concern and is a clear response to fear of catching the virus. Driving will be the preferred mode of transport when visiting the CBD in the "near future".

Respondents were also looking for parking solutions - subsidies and increases to capacity. Open, outdoor dining spaces and shopping experiences were also popular solutions.

Perceived time that COVID safe measures should remain in place

Visibility of crowding (e.g. real time updates of where crowds are in the city)



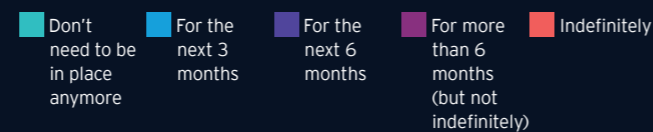
Extensive cleaning procedures and letting the public know they are in place (e.g. on public transport, public areas, etc.)



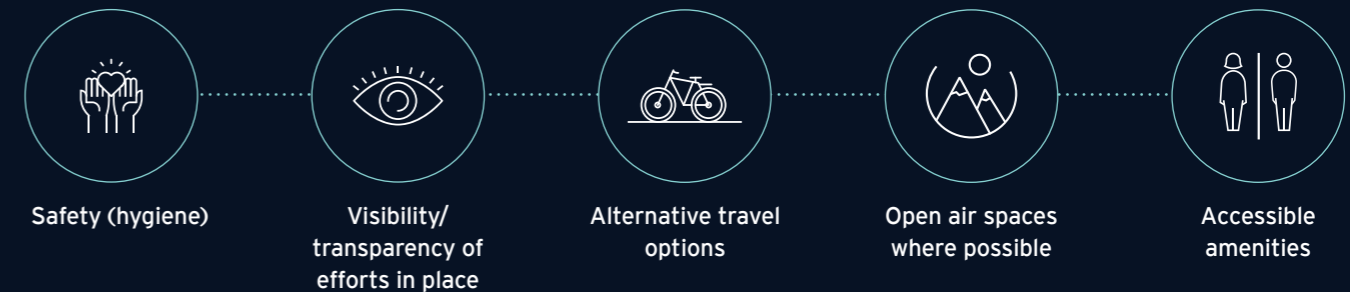
COVID-19 vaccination mandates (e.g. showing vaccination status at restaurants, bars, events, etc.)



Visible enforcement of COVID-19 regulations (i.e. mask wearing, social distancing, checking-in)



Key needs to encourage return



How will COVID-19 concerns influence future visitation?

HYGIENE

"I think there's a lot of stigma with COVID being spread in the city, with lots of the population, so I might avoid it for a while. I don't think my parents will let me go there much either unless I'm really careful."

Age 14-17, no children, lives more than 30 minutes travel time to the CBD, does not work in CBD

RULES

"I'd hope that [COVID] rules are more enforced - when you're driving around people aren't following the rules. I wouldn't be going to the CBD if people aren't doing the right thing."

Age 45-54, children, lives more than 30 minutes travel time to the CBD, works in CBD

COMMUNITY COMPLIANCE

"Knowing businesses are complying with current regulations, widespread awareness of regular cleaning, hand sanitiser and no-touch crossings, would be helpful."

Age 35-44, children, lives more than 30 minutes travel time to the CBD, does not work in CBD

RESTRICTIONS

"Concerns? Not really... not in terms of catching COVID. If we're going to catch it, we're going to catch it. I just need restrictions to be lifted."

Age 25-34, no children, lives less than 30 minutes from CBD, works in CBD

REASSURANCE

"Could reassure me by putting in social distancing rules and limiting the amount of people on public transport."

Age 55-64, children, lives less than 30 minutes from CBD, does not work in CBD

TRANSPORT

"I would probably drive in more so I guess reasonable parking fees, specials [would address my concerns]".

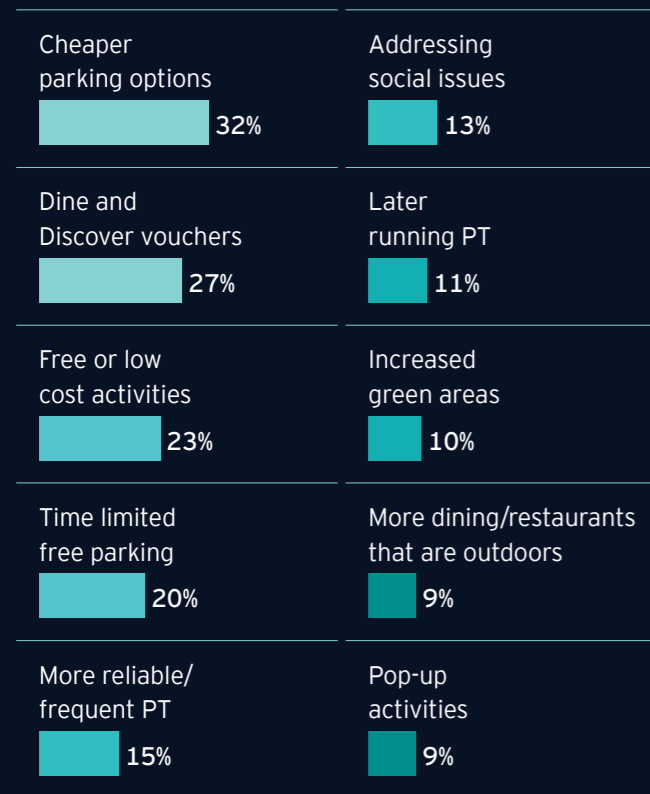
Age 45-54, children, lives more than 30 minutes travel time to the CBD, does not work in CBD

INITIATIVES TO INSPIRE

When we asked people to tell us what initiatives would bring them back to the CBD, some responses were no surprise and others raised eyebrows.

Convenience is important: cheaper and easier-to-access parking and more reliable and frequent public transport are three of the top five initiatives to re-engage Sydneysiders.

Top initiatives overall (within the top 3)

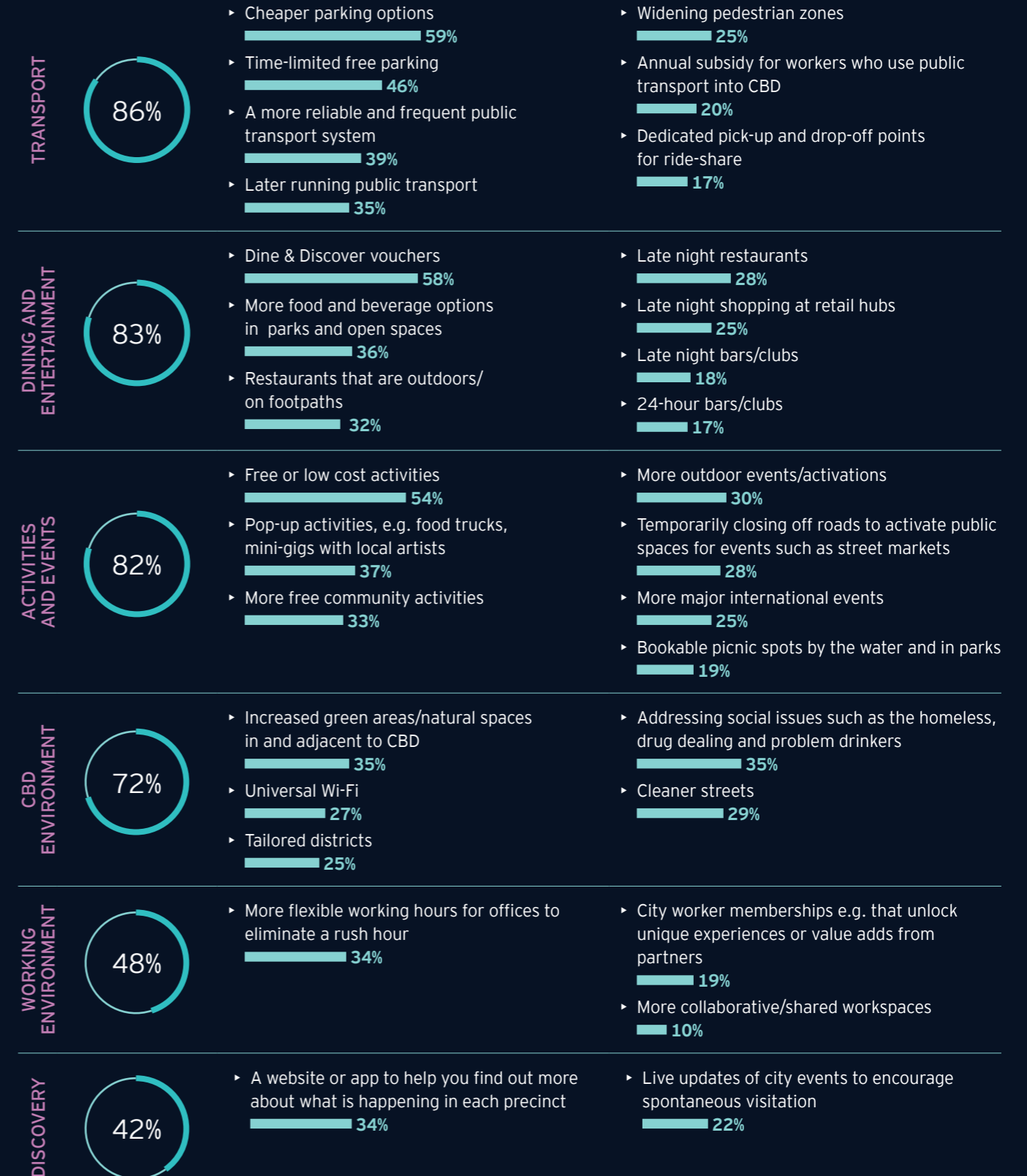


In the hierarchy of needs, people prioritise the practicalities of safety and convenience. But once the baselines of parking, public transport, cleanliness and safety in the streets are stripped out the top initiatives are more intriguing:

- ▶ **Dining incentives:** Dine & Discover NSW, a program launched by the NSW Government in 2021, encourages people to get out and about and support dining, arts and recreation businesses.
- ▶ **Green space:** Two thirds (64%) of people appreciate the CBD's open-air spaces, but green space is not a territory strongly associated with the CBD. Creating more parks, green space and open-air settings, like rooftop terraces, could strengthen the CBD's offering.
- ▶ **Alfresco dining:** The desire for outdoor dining is particularly prominent among older Sydneysiders (35% amongst those 55-69 and 42% amongst those 70-plus), who are the least engaged with the CBD but also can have significant disposable income. Combining more green and outdoor spaces with more outdoor dining options could appeal more broadly to Sydneysiders of all ages.
- ▶ **Pop-up activities:** People want cheap or free events and dining, such as food trucks and mini-gigs featuring local artists, more free community activities and more outdoor events and activations.

The initiatives in detail

Key initiatives: Net impact



WHERE TO FROM HERE?



We know the CBD must change. But what might that change look like? And how can we use this once-in-a-lifetime opportunity to create a CBD that bounces back better than it was pre-pandemic?

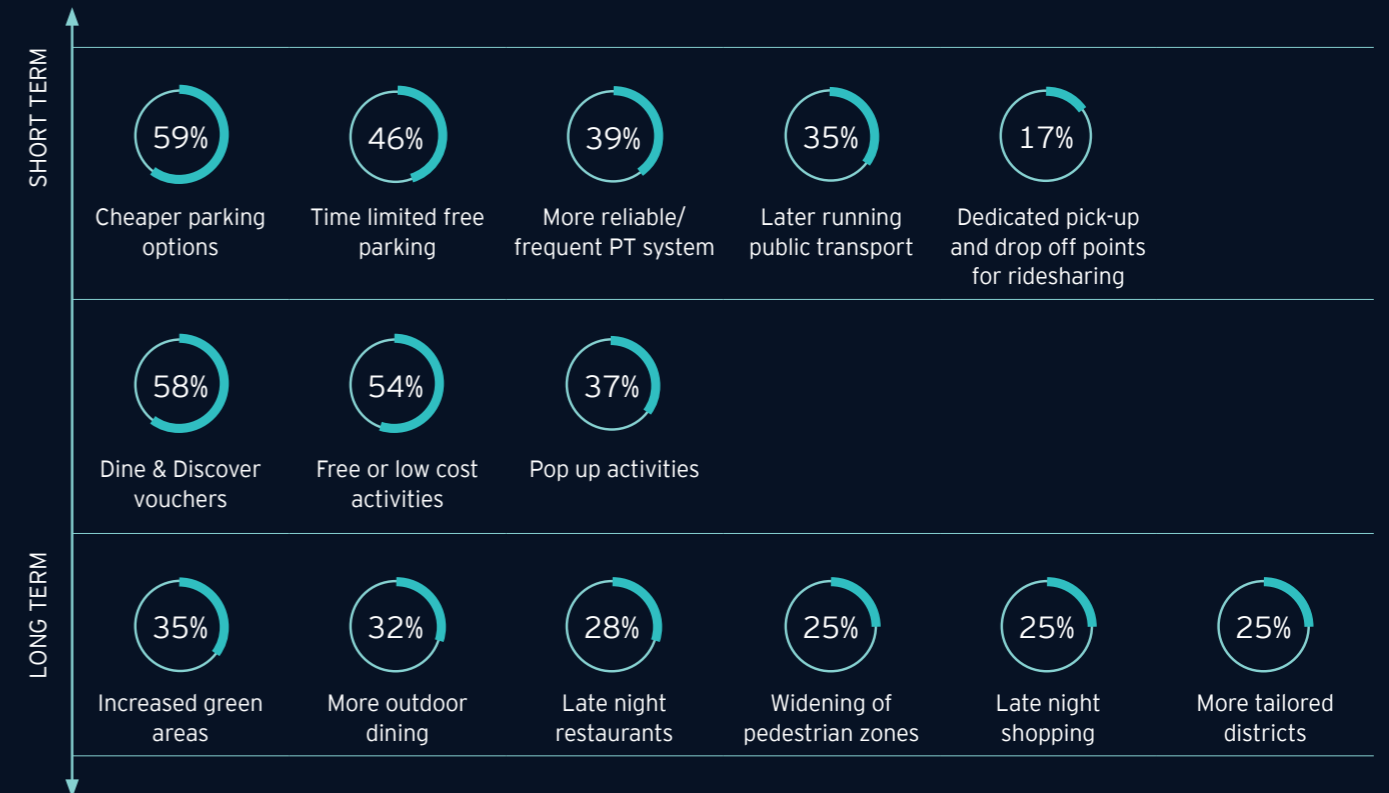
The process of reimagining our CBD is a long-term challenge for everyone with a stake in the future of our city. But we can start by addressing the immediate barriers to visitation and employ short-term tactics to welcome people back.

After traditional obstacles - like parking and transport - are addressed, we must look at long-term placemaking initiatives that create destinations where people want to be. Vouchers and events can tempt people back to experience the CBD anew, but a memorable experience will bring them back time and again.

We must also acknowledge that the profile of the CBD worker has changed permanently. Most workplaces now offer hybrid or flexible working options for employees - and 3.3 days each week in the office is the average preference for CBD workers.²⁰

There is also a much wider spectrum of work and lifestyles that must be accommodated in the CBD. On one end there are those that can't wait to return to their desks five days a week. On the other are the people who are happy working from home forever. In the middle are a range of people - from those who relish their one day in the office each week so they can catch up with colleagues, check out the latest bar or do a spot of shopping, to those who resent the trek but must do so for team days. Responding to this variety of work and lifestyle preferences presents new opportunities for retail and hospitality businesses in the CBD.

The size of the challenge is as big as the CBD. But to tackle this big problem we can start small. Breaking the challenge down to the district-level - with one small precinct or pocket of the CBD - we can define each unique environment, create new experiences and strengthen each sub-brand within the CBD.



20. EY, Reimagining our Economic Powerhouses, 2021

PRACTICALITIES

CHEAPER PARKING OPTIONS

"Free/subsidised parking would help me feel safe and I wouldn't be risking exposure to COVID on a train."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

TOURIST HAUNTS

"All the places with the best views [and] in the best locations are too touristy and you can't afford them."

Age 18-24, CALD, lives less than 30 minutes from the CBD, works in CBD

ACCESSIBILITY FOR FAMILIES

"Bring back Family Day - flat fare on public transport and real savings on activities in the city for families."

Age 30-49, has children, lives less than 30 minutes from the CBD, works in CBD

CHEAPER PARKING OPTIONS

"Usually the cost of parking in the city can turn me off going."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

BALANCING THE BUDGET

"There should be a balance of luxury places and places where any family can enjoy a meal without breaking their budget."

Age 18-25, CALD, lives less than 30 minutes from the CBD, works in CBD

AFFORDABILITY

"Pushing more and more of the luxury and premium-ness out of the CBD and getting a much bigger uptake of medium level entertainment and attraction."

Age 30-49, Identifies as ATSI, lives 30 minutes or more from the CBD, does not work in CBD

PUBLIC TRANSPORT OPERATING HOURS

"Transport should operate for longer and people should be able to rely on it - if it's the same as now where sometimes it goes and sometimes it doesn't, then free transport wouldn't help."

Age 25-29, CALD, lives less than 30 minutes from the CBD, works in CBD

ACTIVATIONS

DINE & DISCOVER VOUCHERS

"I think the Dine & Discover vouchers were a fantastic way of encouraging people to support local business and get the population returning to places of leisure."

Age 25-29, has children, lives less than 30 minutes from the CBD, works in CBD

FESTIVALS

"Should be more happening like celebration of some big festivals ... Australia is a diverse country so celebration of festivals with everyone will bring people closer and understand each other's culture."

Age 30-49, has children, lives 30 minutes or more from the CBD, works in CBD

FAMILY FRIENDLY EVENTS

"Going to the CBD for leisure requires activities [or] entertainment such as live music and concerts, and re-opening the museums and exhibitions, zoos would be fun! This will encourage families to day trip to or through the CBD."

Age 30-49, has children, lives less than 30 minutes from the CBD, works in CBD

CULTURAL INCLUSION

"Engaging people locally... doesn't have to be Indigenous only - could get people from different cultures. It would be really good if they took a stance to involve Indigenous culture. At the moment they do just enough to not get told they're doing nothing."

Age 40-59, Identifies as ATSI, lives 30 minutes or more from the CBD, does not work in CBD

MORE AFFORDABLE RETAIL

"Perhaps some more affordable boutiques such as those in Newtown. I find retail in the city to be luxury brands and expensive."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

VARIETY OF EVENTS

"Lots of activations around the city and harbour - markets, outdoor concerts, food festivals, music festivals, outdoor cinemas, outdoor exhibitions (something similar to Sculpture by the Sea)... lots of outdoor activities!"

Age 25-29, has children, lives less than 30 minutes from the CBD, works in CBD

ARTS AND CULTURE

"There are lots of museums in the city, but they almost act like old dusty libraries that nobody visits."

Age 30-49, Identifies as ATSI, lives 30 minutes or more from the CBD, does not work in CBD

POP UP ACTIVITIES AT MARTIN PLACE

"A marketplace for the city restaurants to have pop up stalls, maybe done in Martin Place. Christmas markets etc."

Age 30-49, has children, lives 30 minutes or more from the CBD, works in CBD

EXCITING EVENTS

"I think the CBD has to get the buzz going again and draw people in. Entertainment for example - concerts, parades and kids' events will create a buzz that then the restaurants, bars and cafes can thrive on."

Age 30-49, has children, lives 30 minutes or more from the CBD, works in CBD

PEDESTRIANISED ACTIVATIONS

"Now that we have the light rail area - parades! Anzac Day parade, Mardi Gras parade, Christmas parade... more year-round things that happen in the city like Vivid."

Age 50-59, Identifies as ATSI, lives 30 minutes or more from the CBD, does not work in CBD

PLACEMAKING

GEORGE STREET

"I think the construction, which is a constant, needs to stop. George Street used to be bustling with shops and bars and now it's a rundown mess."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

BEAUTIFYING THE CBD

"I like the concept that the UK uses where big business / large scale buildings also have the responsibility to ensure that the surrounding area has been 'beautified' for the local people. Look at the success of the Barangaroo area pre COVID... this should be a mandate across the entire CBD."

Age 25-29, has children, lives less than 30 minutes from the CBD, works in CBD

INCREASED GREEN AREAS AND OUTDOOR DINING

"I would feel safer outdoors as COVID transmissions are less likely outdoors. Also, we've all been indoors so much so being outside would be lovely for spring and summer."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

GRASSED AREAS

"It would be great to have more grassed areas where people can sit and eat and drink, with entertainment areas as well."

Age 30-49, has children, lives less than 30 minutes from the CBD, works in CBD

GEORGE STREET

"I don't like the CBD at night - it's not even late but you meet so many strange people yelling at you ... they're all on George Street and sometimes I don't want to walk there. The government needs to look after them."

Age 50-59, CALD, lives less than 30 minutes from the CBD, works in CBD

GREEN SCENE

"It would be nice to have somewhere besides Hyde Park to sit and have a picnic... the current spaces can be overcrowded."

Age 25-29, no children, lives less than 30 minutes from the CBD, does not work in CBD

PITT STREET MALL

"Pitt Street Mall could do with a face lift. It really has no life... it's just busy."

Age 30-49, has children, lives less than 30 minutes from the CBD, works in CBD

TOWN HALL

"Town Hall is a major meeting place but it's just awful ... it smells and the vibe isn't good. Considering we have the actual Town Hall building and QVB which are beautiful, grassed areas and more seating would be good."

Age 30-49, has children, lives less than 30 minutes from the CBD, works in CBD

Tapping into new trends

Hybrid work: While work from home has advantages, people miss connecting and collaborating. *How can we incentivise people to return to their office?*

Financial uncertainty: Some people feel stretched financially, others face precarious work and others have found alternative uses for the money they've saved during lockdowns. *How can we create more value for people in the CBD?*

Health and safety: People can't control their own safety and feel reliant on others to do the right thing. *How do we make people feel safer when returning to the CBD?*

Online shopping: Australians have valued the convenience and safety of online shopping and now make more than 11% of their purchases online.²¹ Bricks-and-mortar retail must give people a reason to shop instore. *How can we create shopping experiences that can't be delivered online?*

This research reinforces that the CBD is ready for reimagining. While the CBD is now in stiff competition with local areas, the battlelines are far from fixed. There are opportunities for the CBD to reposition itself in people's hearts. The pandemic has led to a change in attitudes, perceptions and behaviour.

Broadly, the research points to four types of attitudes:

- ▶ **Place and planning** - 'I don't feel safe in a crowded place'
- ▶ **Creating demand** - 'I can't be bothered going into the CBD'
- ▶ **Activating the city** - 'The city is dead'
- ▶ **Mobility and access** - 'It's too hard'

We know there is a baseline of expectations to be met. Convenience and public transport are important. But people are also telling us that activations - vouchers, events, late night shopping and a greater diversity of bars and restaurants - would entice them back to the CBD.

We also know that placemaking initiatives, those building blocks for longevity, are in many cases affordable. Ramping up the green space and outdoor dining and creating precincts with distinct personalities can be achieved by working together.

Our challenge is to reframe the narrow or dated perceptions that stop Sydneysiders from rediscovering their CBD. Our opportunity is to shine a light on the multiplicity of sub-brands within the CBD for the many audiences looking for new and unexpected experiences. In doing so we will flick the switch on a new era for Sydney.

21. Australian Bureau of Statistics, Retail Trade statistics, January 2022

CONCLUSIONS & RECOMMENDATIONS

The Sydney CBD is not unique in facing challenges caused by the COVID-19 pandemic. Most, if not all, global city CBDs are asking many of the same questions posed in this report. While there is no one solution to rebuilding Sydney's CBD, we propose several ideas and initiatives to be considered by NSW Government and other policy makers. We hope they are a useful contribution to an ongoing discussion.

A simple way of thinking about the challenges and solutions is based on the idea that behaviour change occurs when three things occur at the same time:

- ▶ **Motivation:** Do people have a strong drive or motivation to come to the CBD to overcome the perception that it's 'easier' to stay local?
- ▶ **Ability:** Is coming into the CBD easy to do? Is providing the types of offerings people want straightforward?
- ▶ **Prompts:** Are people regularly reminded that the CBD is a great place to be and worth the effort? What campaigns are in place to attract visitors from near and far?

While many of the ideas and solutions outlined may not be 'new', the report underlines the value of a coordinated approach. Activities, programs and initiatives must result in tangible and measurable changes not only in people's attitudes and behaviours toward the CBD, but also deliver tangible outcomes like increased footfall, higher tenancies and increased economic activity.

Detailed are several ideas and initiatives to be considered by NSW Government and other policy makers that highlights opportunities for businesses to re-engage and attract people back to the CBD.

PLACEMAKING AND PLANNING

1 Amp up alfresco dining and green space

There is a clear demand for more alfresco infrastructure and access to green space in the CBD. There has already been major investment in alfresco in places like The Rocks and we recommend the continued roll out across other parts of the CBD. In addition, future developments in the CBD should promote the innovative use of green space, such as the Headland expansion at Barangaroo and pocket park by the Gateway development at Circular Quay. Survey results appear consistent with recent reporting that the community's appreciation of the benefits of green and 'restorative' spaces in urban environments is heightened.

2 Expand parklets across the CBD

Consideration should also be given to the expansion of parklets within relevant CBD areas. This could include the temporary use of road space to give venues more room to operate and to provide potential space for arts and culture activities.

3 Fill empty space with art, culture and other activations

The impact of the pandemic is likely to see an increase in the availability of vacant space in CBD buildings, particularly in office towers. In the short-term, we suggest that the property sector work in collaboration with arts and culture institutions, festivals and hospitality operators to find mutually beneficial activities, such as hosting art shows, live performances or theatre that will fill empty space and drive visitor numbers back into the city.

4 Investigate affordable price points for food and beverage operators

Affordability of offer is a major barrier to people accessing the CBD, according to our research. While the challenge is multi-faceted and requires action from both government and the private sector, a significant obstacle is the cost of rents in many parts of the CBD, which in turn make it difficult for operators like medium-priced restaurants or arts companies to operate. We recognise, too, that many commercial landlords have seen a decline in revenue over the duration of the pandemic. While challenging, we do suggest that the property sector investigate ways to ensure affordable price points for food and beverage are maintained as part of the post-pandemic tenant mix.

5 Sweat the assets of existing buildings

A more creative use of building space could also help to maximise capacity and create new business opportunities. Sweating the assets of existing buildings should be explored and tested. For example, a café that operates from morning until 4pm, might then revert to a bar after 6pm.

CREATING DEMAND

- 1 Extend the Dine & Discover campaign**

Our research demonstrates strong public support for the Dine & Discover program. Given the impact of the Omicron wave, which again suppressed demand for activities in the CBD, we recommend extending the deadline for Dine & Discover, Stay & Discover and any other related vouchers until at least 31 December 2022.
- 2 Encourage more 'discovery' with broader offerings**

Consideration should also be given to expanding the range of activities that can be redeemed for the 'Discover' aspect, such as for live performances in a pub or café. There might also be merit in offering additional vouchers for off-peak times and days when footfall into the CBD is likely to be slower, such as Monday or Friday lunchtime.
- 3 Explore a culture pass**

There might also be scope for greater coordination across the cultural sector in terms of visitor attraction. A 'culture pass' for venues and institutions across Sydney has sometimes been discussed, and this could be an opportune time to trial such a system.
- 4 Enhance pass offerings to attract more tourists**

Similarly, as tourists return to Sydney and NSW, there could be scope to enhance and expand the Sydney Pass iVenture Card to include a wider range of offerings for visitors.
- 5 Encourage new activities and amenities**

There should also be consideration for new activities or amenities that draw people into the CBD. The recent suggestion by Arup and the Committee for Sydney to introduce a 24-hour food market is worth pursuing. Similarly, the opening of a major new e-gaming venue at Sydney's Central Park Mall is a good example of diversifying the offer for people to visit the city.
- 6 Offer sweeteners in co-working spaces**

Contractors, participants in the 'gig-economy' and others who regularly work from home might be incentivised to work from the CBD with discounts on CBD co-working spaces. Likewise, employers working under a hybrid model might be incentivised to rent workshop, meeting and board room spaces in the CBD under a subsidised or reduced rate model.
- 7 Tell the CBD story to a wider audience**

The CBD is known for its 'show-stopper' events like VIVID Sydney, Mardi Gras and major sporting events. Considerable effort has gone into activating the CBD through initiatives such as the CBDs Revitalisation Program. Yet, what the research tells us is that while 'special event' food offerings, cultural institutions and nightlife are big drawcards, people don't always know what's happening. Funding targeted audience engagement using a combination of traditional, non-traditional media and influencers to reinforce perceptions that the CBD is special would help support various other activations and ensure that visitors to the CBD are prompted to come in an ongoing way.

ACTIVATING THE CITY

- 1 Host both regular and one-off activations**

The report demonstrates a clear role and public support for regular and one-off activations to encourage people back into the CBD. Progress has already taken place in this area by NSW Government, such as the \$50-million CBDs Revitalisation Program and the ELEVATE Sydney festival that imaginatively repurposed the Cahill Expressway for a cultural festival. We encourage further similar initiatives, particularly those that use existing infrastructure and outdoor space.
- 2 Complement major events**

We also encourage the use of major events in and around the city to persuade visitors to visit and stay longer in the CBD. An example might be using major sporting events at the SCG and Sydney Football Stadium to encourage visitors into the city before and after a game. Other imaginative ideas that came out of our focus groups included the temporary closure of Oxford Street to coincide with Sydney WorldPride 2023; a 'festival first night' style event in the Domain and the regular programming of the Sydney's Open for Lunch initiative that launched in 2021.
- 3 Target young people and families**

We also recommend the programming of activities that explicitly target both young people and people with families to come into the city for non-work-related days out. Price point will be an important factor for both demographic groups and should include activities that do not involve alcohol.
- 4 Create a 'city camp' program for school groups**

Encourage schools and community groups to undertake 'City Camps' where children from suburban and regional areas both in NSW and interstate get to experience 'city life', advocating and sharing these experiences with their friends and family. This may encourage them to spend more time in the city as they reach adulthood.
- 5 Elevate the unique personalities of each precinct**

Develop a strategic approach to events that emphasises sustained activation. This could be achieved through precinct activation campaigns that highlight the unique 'personalities' of place including their businesses, characters, and sub-brands. Build upon and extend successful campaigns that Destination NSW and the City of Sydney are working on.

MOBILITY AND ACCESS

- 1 Support diverse public transport options**

How people get to and from the CBD is central to this discussion. The research suggests support for an increased range and diversity of public transport options. We should recognise that significant investment has been made over recent years in public and active transport servicing the CBD, including the CBD and South East Light Rail, Barangaroo Ferry Wharf, Wynyard Walk and a suite of new cycle lanes. While accepting that it may take some time for many people to be comfortable travelling on public transport into the CBD, a range of options should be looked at to encourage ridership, including subsidised annual travel passes, introduction of a 'CBD ticket' that allows unlimited travel within certain 'zones', and later night running of services.
- 2 Think long term, not short term, about parking**

Our research shows that a significant number of people feel more comfortable driving into the city, at least in the short-term while congestion remains lower than pre-pandemic levels. This creates a challenge for the Sydney CBD, which has embraced active and public transport over the past decade, including substantial investment in Metro, Light Rail and cycle lanes. We urge decision makers to resist the call to increase parking amenities within the CBD or to subsidise parking within the city. We are confident that patrons will return to public transport in due course.
- 3 Trial shared mobility solutions**

Trial the use and promotion of shared mobility like e-scooters on new active transport infrastructure as a means by which to travel the 'last mile' between major events and public transport and home.
- 4 Address 'transport deserts'**

Identify and provide integrated transport options within 'transport deserts' - for example along the Eastern corridor of the city between the CBD and Green Square (that upon completion will be home to 60,000 people). Despite being only four kilometres from the CBD, the trip takes approximately 40 minutes to travel via public transport, but would only take 20 minutes were there a connective, active or 'light transport' corridor.
- 5 Promote flexible working hours**

As many employees return to the office, at least for part of the week, we suggest that employers offer and promote flexible working hours where possible. This would allow more people to travel outside of peak times, relieving congestion on public transport and reducing the likelihood of crowding on buses, trains and ferries. Offering subsidised public transport to international students, as is already offered to domestic students, could also encourage more people to venture into the CBD from nearby universities.
- 6 Subsidise 'hot offices' in CBD locations**

'Hot offices' may be considered by government and/or the property sector, where subsidies encourage employees to access CBD work locations or shared workspaces with free access to fast Wifi, an affordable lunch and quiet work spaces.
- 7 Trial later night public transport**

We also suggest a trial of late public transport running from Thursday to Saturday nights to provide easier and more cost effective transport for young people and hospitality workers.

LICENSING AND REGULATION

- 1 Explore opportunities for more late-night licences**

The rules in which businesses operate adapted to the pandemic. NSW has been swift to act where necessary, such as giving businesses more scope to expand their trade into alfresco areas and offering greater flexibility for off-trade sales such as bottled cocktails. The extension of late-night trading hours by the City of Sydney has had a positive impact on encouraging a diversity of activities in the CBD, and in a similar vein we could explore the potential for more late-night licences in particular districts.
- 2 Align planning and licensing regulation**

A significant amount of regulation impacting the cultural sector has already been removed through legislation such as the Liquor Amendment (Night Time Economy) Act 2020. However, consideration should be given to further aligning planning and licensing regulation, for example to make it more straightforward for an existing small bar which has development consent but wishes to extend its trading hours. We also support recent moves to allow musicians to use loading zones in and around venues in order to get their instruments and equipment for gigs in and out of venues.
- 3 Recast the definition of offensive noise**

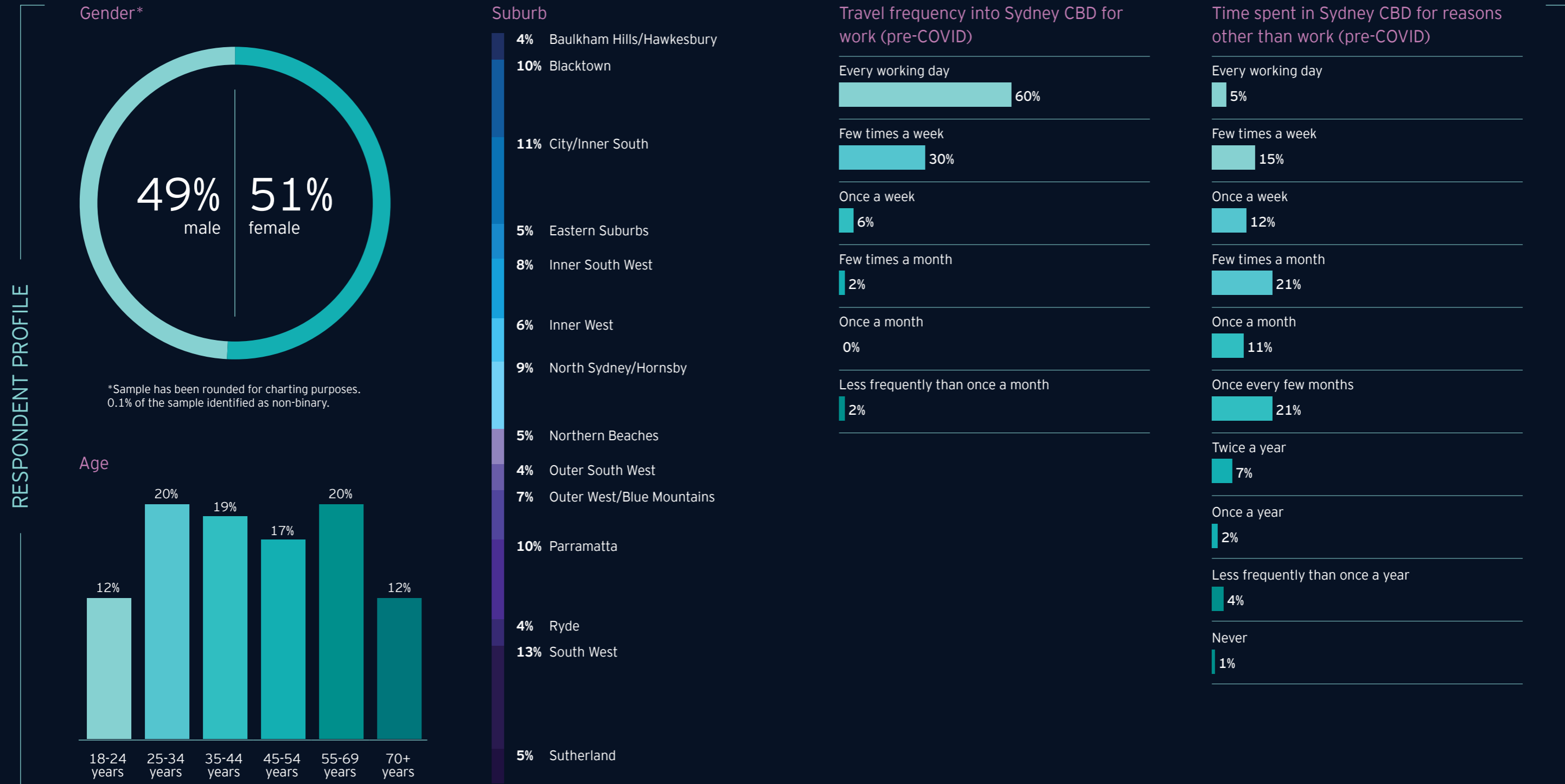
Policies around noise and sound have the potential to enhance or stifle local cultural and hospitality amenities. It is possible that as the number of residential dwellings increases in the CBD, that resident complaints about noise also increase. While a balance is clearly required, we urge decision makers at a local and state level to start from a position that sound is an integral part of CBDs and urban centres and to adopt policies accordingly. One option could be to recast the definition of offensive noise. The regulation means well but is often used to complain about noise that isn't captured by the code, e.g. people talking outside a café or live music before 10pm.
- 4 Encourage outside-the-box activation of public institutions**

The research clearly confirms public support for activation of institutions outside their traditional use. By streamlining planning and licensing, this would support ongoing efforts to activate institutions such as libraries, museums, warehouses and carparks for different uses, like dance parties.
- 5 Support retail pop-ups swaps and markets**

There is also an opportunity to investigate support that makes lower-cost retail like pop-up shops, swaps and market activations easier and more cost-effective to establish.

APPENDIX 1

The participants undertook an 11-minute survey, with 1,529 responding to additional deep dive questions. On average, participants spent 24 minutes sharing their views.



APPENDIX 2

Sentiment towards the Sydney CBD

Perceptions of the CBD and comparison to other areas - subgroups

Sentiment towards the Sydney CBD - Subgroups	Gender (%)		Age (%)						Home region (%)													
	Male	Female	18-24	25-34	35-44	45-54	55-69	70 plus	Baulkham hills and Hawkesbury	Blacktown	City and Inner South	Eastern Suburbs	Inner South West	Inner West	North Sydney and Hornsby	Northern Beaches	Outer South West	Outer West and Blue Mountains	Parramatta	Ryde	South West	Sutherland
	n = 1,460	1,545	337	615	547	517	603	398	59	172	372	188	266	322	374	169	61	116	289	256	215	158
I'm proud of the way the CBD is a showcase for Sydney	68	70	70	69	71	64	72	69	70	71	65	66	66	62	63	70	88	66	70	67	78	70
I've always loved spending time in the Sydney CBD	67	70	75	71	71	65	64	67	66	68	70	67	72	67	61	59	82	64	69	64	77	69
There's always something new to experience in the Sydney CBD	64	68	71	71	66	62	65	61	81	73	56	62	65	57	57	61	80	66	68	61	73	72
The Sydney CBD is an ideal destination to spend quality time with groups of friends or family	62	64	70	68	63	59	61	58	53	66	64	63	68	62	54	51	82	57	65	61	69	66
I love the experience of being in the Sydney CBD around people from all over Sydney	61	63	71	69	63	58	57	53	55	66	63	61	63	60	54	50	80	51	64	61	69	62
The Sydney CBD offers much more diverse experiences than my local area	70	70	75	72	65	69	71	68	73	77	50	67	70	68	70	62	84	72	71	77	75	69
There's something special about going to the Sydney CBD compared to other places	64	67	66	68	65	63	65	66	70	72	59	58	68	63	59	62	80	63	68	64	68	67
I don't feel the need to return to the Sydney CBD to find great experiences	34	31	29	34	34	34	30	32	44	35	32	26	32	33	36	34	33	33	33	30	29	26

▲ Indicates significantly higher
▼ Indicates significantly lower

Sentiment towards the Sydney CBD - Subgroups	Household status										Annual household income (%)				Other key groups (%)			
	Couple no children at home	NET: Couple with U18 children	I live by myself	NET: Couples with 18+	Living with parents only	NET: Non-couple with U18 y/o	NET: Other people living at home	NET: Other adults (shared accommodation only)	NET: Non-couple 18+ y/o kids	Under \$30k	\$30,000 - \$59,999	\$60,000 - \$99,999	\$100,000 - \$149,999	\$150,000 or more	CBD Worker	ATSI	CALD	Person with disability or chronic health condition
	n = 961	714	457	238	214	168	139	155	105	154	371	647	685	772	1,144	53	802	286
I'm proud of the way the CBD is a showcase for Sydney	68	70	66	75	65	74	72	68	73	73	73	71	70	68	70	62	74	67
I've always loved spending time in the Sydney CBD	67	72	65	72	67	70	74	68	66	62	71	70	71	67	72	68	73	61
There's always something new to experience in the Sydney CBD	62	71	61	72	65	71	81	68	64	69	68	69	67	65	67	74	69	66
The Sydney CBD is an ideal destination to spend quality time with groups of friends or family	60	65	61	63	66	72	81	61	66	65	68	66	61	63	68	61	71	61
I love the experience of being in the Sydney CBD around people from all over Sydney	59	66	56	63	59	71	78	68	62	60	67	63	63	63	67	61	72	56
The Sydney CBD offers much more diverse experiences than my local area	66	71	68	72	74	73	80	68	77	68	72	71	72	70	70	71	76	75
There's something special about going to the Sydney CBD compared to other places	65	67	61	69	65	69	74	63	67	65	75	64	70	63	64	60	69	65
I don't feel the need to return to the Sydney CBD to find great experiences	32	34	31	28	34	29	28	33	36	38	28	33	31	33	35	35	29	39

APPENDIX 3

Perceptions of the area product offer

	Sydney CBD	My local area	Other areas in Sydney
The best fine dining options	15	-11	-5
A great place to experience the arts	11	-13	2
The best dining options for special occasions	10	-6	-4
Has the best range of bars	10	-8	-2
Has the best high end shops	10	-12	2
The widest range of dining options	8	-6	-2
Has the best theatre and arts venues	8	-12	4
The types of restaurants you can't find anywhere else in Sydney	7	-6	0
The types of bars you can't find anywhere else in Sydney	7	-5	-2
Has the best boutique/independent/small bars	6	-5	-1
Is a fun place to be	5	0	-5
Holds the best live events	3	-9	6
Provides a culturally diverse experience	1	-5	3

The best dining, bar, shopping and arts experiences

Provides the best diverse experiences

	The Sydney CBD	My local area	Other areas in Sydney
The best place to see live music	0	-7	7
Has the best clothes and fashion shops	-1	-5	6
Offers something for all the family	-1	2	-1
Has the best boutique/independent shops	-2	-4	6
Provides the best shopping experience	-3	-1	4
The best casual dining options	-6	12	-7
Easy to get there from my home during the day	-8	22	-14
I can feel unsafe in the area	-8	-3	12
Is a relaxing place to be	-10	15	-5
Easy to get there from my home at night	-15	26	-11
Has the best green areas/natural spaces	-15	13	2
Provides an offer that is the best value for money	-15	14	2
Has the best shops for everyday shopping	-17	13	4

Provides the best diverse experiences

Is convenient and the best for casual dining, everyday shopping and green spaces

APPENDIX 4

Challenges and solutions by solution-type

PLACEMAKING AND PLANNING

Research insight:

- “I feel safer staying in my local area”
- “It’s more relaxing in my local area”
- “It’s cheaper to rent a work space near home”

Solution	Motivation	Ability	Trigger	Anticipated outcome
More alfresco dining		✓		You can eat outdoors - it’s safe
More open space/expansion of parklets		✓		You can spread out - it’s safe
More green roofs, walls and streets	✓	✓		It’s cool, calm and beautiful in the city
Provision of vacant spaces for alternate uses	✓			It’s not cramped - it’s safe
Provide rents at price points that encourage affordable service		✓		It’s the same price but better in the CBD

CREATING DEMAND

Research insight:

- “It’s easier, cheaper and more convenient to stay in my local area”
- “There aren’t enough shops for everyday items”
- “It’s cheaper to stay local”

Solution	Motivation	Ability	Trigger	Anticipated outcome
Extend Dine & Discover until December 2022	✓		✓	It’s affordable to come into the CBD
Expand range of activities redeemable through Dine & Discover. Offer additional Dine & Discover vouchers during off-peak times when footfall is slower	✓	✓		The quality of experience is better in the CBD. Increase footfall in traffic to the CBD
Culture pass to venues and institutions	✓		✓	The CBD has art and culture that my area doesn’t
Expansion of iVenture Card to include wider range of offerings to visitors	✓		✓	The best attractions are in the CBD
24-hour food market and new major e-gaming venue	✓		✓	Diversification of offering, entice visitors
Incentivise the gig-economy to work from the CBD	✓		✓	I want to work in the CBD
Market/promote events more widely	✓	✓	✓	Entice/encourage visitors back to the CBD/generate excitement about the CBD

CHALLENGE: ACTIVATING THE CITY

Research insight:

- “I only go to the CBD on a special occasion”

Solution	Motivation	Ability	Trigger	Anticipated outcome
Continued support for City activation via CBDs Revitalisation Program	✓	✓	✓	Full events calendar to provide sector investment and ongoing opportunities to encourage visitation Maintain a sense of 'special' and 'new' about the CBD
Leverage major events to encourage people to stay longer, potentially in conjunction with Dine & Discover			✓	Place where we go to connect and to feel a sense of pride The CBD is a diverse place
Closure of Oxford Street to coincide with Sydney WorldPride 2023, festival first night returns to the Domain and ongoing programming of Sydney Open for Lunch				
Diversification of event program to explicitly target young people and families to come to the city to be entertained	✓		✓	The CBD offers everyone a sense of belonging and something to do, no matter who you are The CBD is culturally and linguistically diverse
Design a 'city camp' option that schools, sporting clubs and faith-based groups can access at a subsidised rate and/or through Dine & Discover	✓		✓	The CBD offers everyone a sense of belonging and something to do, no matter who you are The CBD is culturally and linguistically diverse
Understanding and support for sustained precinct activation campaigns that highlight the unique 'personalities' of place including their businesses, characters, and sub-brands. Build upon and extend successful campaigns that Destination NSW and the City of Sydney are working on			✓	Shift perception that CBD is one-size fits all. Match offering to market

CHALLENGE: MOBILITY AND ACCESS

Research insight:

- “It's too hard if I can't drive my car and (cheaply) park it in the middle of the CBD”
- “It's too expensive to get home if I want a late night out or am a hospitality worker”
- “If it takes too long, I won't do it”
- “I can't rely on public transport”

Solution	Motivation	Ability	Trigger	Anticipated outcome
Highlight the range of travel options from the suburbs to the CBD as well as travel options within the CBD including ferries, bike lanes, walking, light rail, bus and train		✓		Highlight ways that you can get anywhere in the CBD in under 10 minutes It's cheaper and easier to leave the car at home, or at the train station
Provide subsidised travel passes within the CBD				The CBD is a central meeting place for friends and families
Micro-mobility and shared e-scooters on active transport infrastructure		✓		The CBD is easy to access
Active or 'light' transport corridor connecting Green Square to the City		✓		Make the CBD the go-to destination for entertainment for a large demographic with high levels of disposable income
Employers offering flexible work hours and 'packages' to employees comprised of subsidised public transport, access to 'hot CBD offices', a free lunch and quiet work spaces	✓	✓		Overcome negative perceptions of proximity targeting those that live within a 30-minute radius Remind people how annoying poor internet, poor food and distractions at home are, and that working from CBD office location is better for their health, productivity and more economical
Late public transport running Thursday to Saturday nights		✓		Easier and more cost effective for young people and hospitality workers to get home safely and stay out later

CHALLENGE: LICENSING AND REGULATION

Research insight:

- ▶ “There are lots of museums in the city but they feel like dusty libraries that no one visits”
- ▶ “It’s too exclusive and expensive to go shopping in the CBD”
- ▶ “It’s too hard to put on anything new or interesting in the CBD”

Solution	Motivation	Ability	Trigger	Anticipated outcome
Extension to late night trading and licensing in particular districts		✓		Increased usage of the CBD at night, positively impacting the night time economy
Further alignment of planning legislation for small bars to align development consent with trading hours		✓		Overcome negative perceptions of safety Ensure that there is a range of venues and offerings available at varying scales
Support ongoing efforts to activate institutions (libraries, museums, warehouses and carparks) for different uses such as dance parties. Do this by streamlining planning and licensing				Shift perception that the CBD is ‘old and dusty’, ‘too touristy’ and unaffordable
Ongoing support for loading zones to ensure artists and musicians can easily move equipment for gigs		✓		Make it easier for artists and musicians to choose to perform in the CBD. Therefore attract more top artists/musicians that will in turn attract the public to their events
Develop a shared position on sound policy specifically to provide a definition of ‘offensive noise’ to limit enforcement under the current regulation of sound that isn’t currently captured by the code (e.g. people talking outside a café or live music before 10pm)		✓		Refine sound policy to be more inline with modern city/entertainment requirements
Make lower-cost retail like pop-up shops, swaps and market activations easier and more cost-effective to establish		✓		There are multiple price points for retail, not just high end

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