

# Late Night Management Areas Research

## Phase 4 Report

September 2015



urbis

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# 1. Executive summary

## Background

This report presents the results of Phase 4 of the Late Night Management Areas Research (LNMAR). Phases 1 and 2 of LNMAR were undertaken in March and December 2010 and Phase 3 took place in December 2012.

LNMAR is implemented by the City of Sydney to provide information on the night time economy (NTE) and support planning and management of the City at night.

LNMAR is a valuable tool that can be used to monitor the performance of the NTE, identify areas for improvement in various precincts, and inform the development of policies and strategies to improve the NTE in accordance with the objectives of OPEN Sydney.

## Method

LNMAR involves three components of data collection:

- Pedestrian counts – number of pedestrians on the street each hour from 5pm to 5am
- Observation survey – on-street activity including congregation, footway congestion, antisocial behaviour, and temporal economic diversity
- Precinct surveys – interviews with patrons of the NTE regarding reasons for visitation, types of venues visited, methods of travel, times of departure, demographic profile and place of residence.

Phase 4 data was collected on Friday 13 March and Saturday 21 March 2015 between 5pm and 5am.

Pedestrian data was collected at 53 observation points across five Sydney CBD Entertainment Precincts (Central CBD, North CBD, South CBD, Kings Cross and

Oxford Street) and five City Suburban Precincts (Pyrmont, Newtown, Surry Hills, Redfern and Glebe).

This year the collected data is also supported by additional analysis based on licensed premises data.

## Key findings

The key findings of the various research elements are summarised below.

### Literature review

- Night time economies are key features of attraction in major cities world wide
- Deregulation of liquor laws since the 1980s has led to increased night time activity in major cities in Australia
- Effective management of night time economies is a challenge in urban contexts
- Incidents of antisocial behaviour peak between midnight and 3am on Friday, Saturday and Sunday nights
- Perceptions of antisocial behaviour and fear of risks to personal safety are seen as a deterrent for potential patrons of the NTE
- Mixed use areas help diversify night time activities increasing the demographic range of participants and acting as a deterrent to antisocial behaviour
- Improved transport, well lit pedestrian access and better agency coordination have been used to manage some night time economies
- Evidence suggests legislative responses such as lockouts and reduced trading hours for licensed venues can reduce the incidents of assault.

### Visitation patterns

- South CBD had the highest peak pedestrian counts (14,352), followed by CBD Central (4,576), Kings Cross (3,888) and Pyrmont (3,188)
- South CBD, Central CBD and Surry Hills were busiest on Friday; while North CBD, Kings Cross, Oxford Street and Newtown were busiest on Saturday
- All precincts were busiest in the evening (5-11pm), with the exception of Kings Cross and Oxford Street which were busiest during the night (11pm-1am)
- Pedestrian counts are influenced by business activity in the precinct:
  - All three CBD precincts were busiest when people were leaving work (6-8pm)
  - Kings Cross and Oxford Street are key night time entertainment precincts and were busiest on Saturday night (10pm-1am)

- Newtown and Glebe, with numerous restaurants, were busiest in the early evening (6-8pm Friday and Saturday)
- Pyrmont, with the Star Casino nearby, was busiest in the late evening (10-11pm)
- It is anticipated that significant drops in pedestrian numbers in Kings Cross and Oxford Street at 1am may be due to the “lockouts” which apply to the precincts after 1:30am.
- The lack of a secondary peak between 3-4am in Kings Cross and Oxford Street suggests that people are leaving the area around 1am, rather than staying in venues until closing times
- Compared to peak pedestrian counts in 2012, the 2015 survey shows:
  - Pedestrian numbers have decreased in almost all precincts. The exceptions were Newtown and South CBD, which saw an increase, and Surry Hills and Redfern, which remained relatively stable
  - The largest decrease was in Kings Cross late at night (12-4am), and in Glebe across all periods.

#### Observed behaviours

- In total 1,465 incidents of antisocial behaviour (ASB) were recorded across all precincts. Over half (52%) were non-serious incidents
- The number of observed serious and less serious ASB incidents has decreased by 80% since 2010. The proportion of serious to less serious incidents has remained relatively constant
- Kings Cross still had the highest proportion of serious incidents (30%)
- Very few ASB incidents were reported in the early evening. On Friday the number of observed incidents peaked at 10pm (23% of all incidents)
- The peak ASB incidents on Saturday occurred at 3am, which coincided with last drinks orders and closing times for many venues
- When the size of each precinct was taken into account, CBD South had the highest rates of ASB recorded, followed by Kings Cross
- CBD South observed the highest number of incidents on Friday, while Kings Cross observed the highest number of incidents on Saturday
- When the number of pedestrians in the precincts was taken into account, Surry Hills, followed by Kings Cross, had the highest number of ASB incidents per 1,000 people
- Pyrmont and Redfern had the highest rates of ASB per 1,000 people on Friday. Kings Cross observed the highest rates per 1,000 people on a Saturday
- There does not appear to be a direct relationship between the concentration of licensed premises and the incidence of ASB

- When ASB density was compared between 2012 and 2015, Kings Cross observed the largest decreases in the number of incidents, while Redfern observed the largest increase per 1,000 people
- CBD South had the highest level of footway congestion between 6-11pm, while Oxford Street had the highest level of congestion between 11pm-1am
- There is a relationship between congestion and antisocial behaviour throughout the evening and night, with the exception of a distinctive peak in ASB at 3am, despite gradually decreasing congestion

#### Business activity

- Over 1,000 businesses were open across all precincts at 6pm, more than 570 were open at 11pm, and more than 200 at 4am
- Overall, businesses were most often cafes or restaurants (31%), followed by pubs, taverns or bars (20%) and retail shops (16%)
- Close to half of all businesses open during the night in the city villages were cafes and restaurants (48%), compared to less than one quarter in the Entertainment precincts (23%). Conversely, close to a quarter (23%) of open businesses in the Entertainment precincts were pubs, taverns and bars compared to less than one sixth (15%) in the villages
- On average, in Oxford Street and CBD North the highest proportion of open business were retail shops (24% and 21% respectively)
- Compared to 2012, there was no change in the proportion of cafes or restaurants, and pubs, taverns, and bars open through the night (31% and 18% of all businesses respectively in 2012 and 2015)
- There has been a slight (+3%) increase in the proportion of retail shops open at night
- There were approximately 2,057 premises with a liquor licence across the ten precincts, up by 13% since 2012
- Of these the majority were on-premises licences (71%), and one in ten were hotel licences (13%)
- CBD Central had the largest number of licences followed by Kings Cross and Oxford Street
- One third of licenced venues are permitted to operate until 12am (36%), with a further quarter closing at 10pm (23%) and one in ten closing at 5am (10%)
- CBD Central (15%) and Kings Cross (14%) had the highest proportion of venues licensed to operate until 5am

#### Precinct survey

- In total 781 people took part in the intercept surveys, with a fairly even distribution of responses across all precincts

- Over half of respondents (56%) were 20-29 years old and male (53%)
- Respondents were likely to have travelled from within the City and Inner South (48%), compared with 55% in 2012. Double the proportion of people came from the Inner West (15%) compared with 2012
- Over half were going home (57%), compared with 23% in 2012 and 3% in 2010
- Less than one in six (15%) were going out to socialise within the precinct, compared with 46% in 2012 and 58% in 2010
- Those who intended to carry on socialising was low, with only 19% planning to go to another area (most often to CBD Central)
- Two fifths (41%) of people suggested that they would, or had, visited a bar, pub or club, up from 39% in 2012
- Over half (58%) of respondents either had, or intended to have, an alcoholic drink, up from 54% in 2012
- Similar to 2012, nearly half of the respondents were leaving before midnight (43%), with a quarter leaving between midnight and 2am (26%). Kings Cross still had the highest proportion of respondents leaving after 3am (25%)
- Overall, a majority of respondents (57%) felt safe in the area, and a quarter were unconcerned (24%)
- In contrast, 85% of all respondents had experienced an incident at some point which made them feel unsafe
- While most of these incidents were less serious, close to a quarter (23%) were described as serious incidents – such as fights and verbal abuse
- Strategies to improve safety were consistent with previous years, with more police (32%) being key. Better lighting (23%) was also suggested, especially in Pymont and CBD North
- In terms of improving the city at night, some respondents suggested more bars and clubs were needed (16%). One quarter provided other suggestions, the majority of which related to removing the “lockout” laws and allowing longer opening hours.

## 2. Introduction

### Background

In 2010, the City of Sydney conducted Late Night Management Areas Research (LNMAR) for the first time. The aim of LNMAR is to collect information about the night time economy (NTE) to support planning and management of the City at night.

LNMAR assists the City and other stakeholders to plan for:

<b>Short term</b>	Precinct dispersal plans for late night areas Location of taxi ranks Location of garbage bins How and when cleansing will occur
<b>Medium term</b>	Transport promotion Transport infrastructure locations Directional signage
<b>Long term</b>	Measures to address footpath capacity Incentives to encourage economic diversity Effective services areas at night.

### Why a night time economy focus?

The NTE is a key economic contributor to Sydney and the wider NSW economy. In 2011 it was estimated that the core NTE, including food, drink and entertainment venues in Sydney generated \$2.7 billion in turnover<sup>1</sup>. In addition the NTE is a key attractor for overseas visitors, as well as being an important asset for local residents and workers in the City.

Over recent years the NTE has grown substantially. In 2012, Council endorsed OPEN Sydney, a long-term strategy for transforming the NTE over the next 20 years. The strategy highlights the importance of the NTE and

the unique challenges associated with managing the City at night. The challenges include:

- Growing pedestrian numbers
- Diverse reasons for visiting the precinct
- Economic diversity and types of businesses open
- Residential growth
- Levels of intoxication, violent crime and antisocial behaviour (ASB)
- Transport availability
- Public space design and servicing
- Governance of the City at night.

OPEN Sydney sets five goals for the NTE including:

- A Global Sydney – innovative solutions, good governance and coordinated action
- A Connected Sydney – connected transport and connecting visitors, business and events
- A Diverse Sydney – diverse options and growth
- An Inviting and Safe Sydney – welcoming public spaces and a more civilised drinking culture
- A Responsive Sydney – responsive regulation, cutting red tape and providing tailored solutions.

The strategy also sets targets to achieve by 2030. They include:

- 40% of people using the city at night will be aged over 40 years
- 40% of businesses open after 6pm will be shops
- Annual NTE turnover will double to \$30 billion
- There will be a +25% increase in jobs.

LNMAR collects a range of data and information relating to the key entertainment precincts and villages across the City. The project collects information relating to pedestrian numbers, ASB incidents, footway congestion, businesses activity, and profile of patrons of the NTE, including reasons for visitation and modes of travel. In 2015 this data is augmented by licensed premises data from the NSW Office of Liquor, Gaming and Racing (OLGR).

LNMAR is a valuable tool to monitor performance, identify areas for improvement, and inform the development of policies and strategies in accordance with the objectives of OPEN Sydney.

<sup>1</sup> Hadfield, P. 2011

# 3. Methodology

Phase 4	13 & 21 March 2015	CBD Central, CBD North, CBD South, Kings Cross, Oxford Street, Newtown (Kings St), Pyrmont (Harris and Union St), Glebe (Glebe Point Rd), Redfern (Redfern St), Surry Hills (Crown St)	84
Phase 3	14 & 22 Dec 2012	CBD South, Kings Cross, Oxford Street, Newtown (Kings St), Pyrmont (Harris and Union St), Glebe (Glebe Point Rd), Redfern (Redfern St), Surry Hills (Crown St)	87
Phase 2	11 & 17 Dec 2010	Kings Cross, Oxford Street, CBD South	37
Phase 1	12 & 20 March 2010		105

## Scope

LNMAR 2015 project analysed the following data sources:

- Pedestrian count survey – undertaken at 81 separate locations across the 10 precincts
- Observation survey – recording observed behaviours, including congregation, footway congestion, and antisocial behaviour, as well as business activity
- Precinct surveys – interviews with pedestrians regarding reasons for visitation, types of venues visited, migration between precincts, methods of travel, times of departure, demographic characteristics and place of residence
- OLGR data – licensed premise data including the number, license type and trading hours of venues across the precincts.

Figure 3.1 overleaf presents the precincts and pedestrian count point locations in LNMAR 2015. More detailed maps of each precinct, including count points, observation areas, and survey routes are presented in Appendix A at the end of this report.

Since the first LNMAR project in 2010 the precincts included in the study has changed. Phase 1 and 2 (2010) of the study focused on the main NTE areas of Kings Cross, Oxford Street and CBD South. Phase 3 (2012) included these three precincts but also covered the main streets in surrounding city villages. Phase 4 (2015) includes two new precincts, the CBD North (including the Rocks) and CBD Central. Table 3.1 presents the difference in precincts surveyed for each LNMAR phase.

**Table 3.1 – LNMAR Phases and precincts**

Phase	Dates	Precincts	Count points
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The following improvements have been made to LNMAR 2015 compared to previous years:

- New questions relating to observed ASB incidents and precinct improvements have been asked in the intercept survey
- Precinct surveys aim to achieve an even distribution between 5-9pm and 10pm-1am
- No intercept surveys were collected after 1am
- Pedestrian count points were standardised across all precincts to be mid-block to enable more efficient and accurate counting.

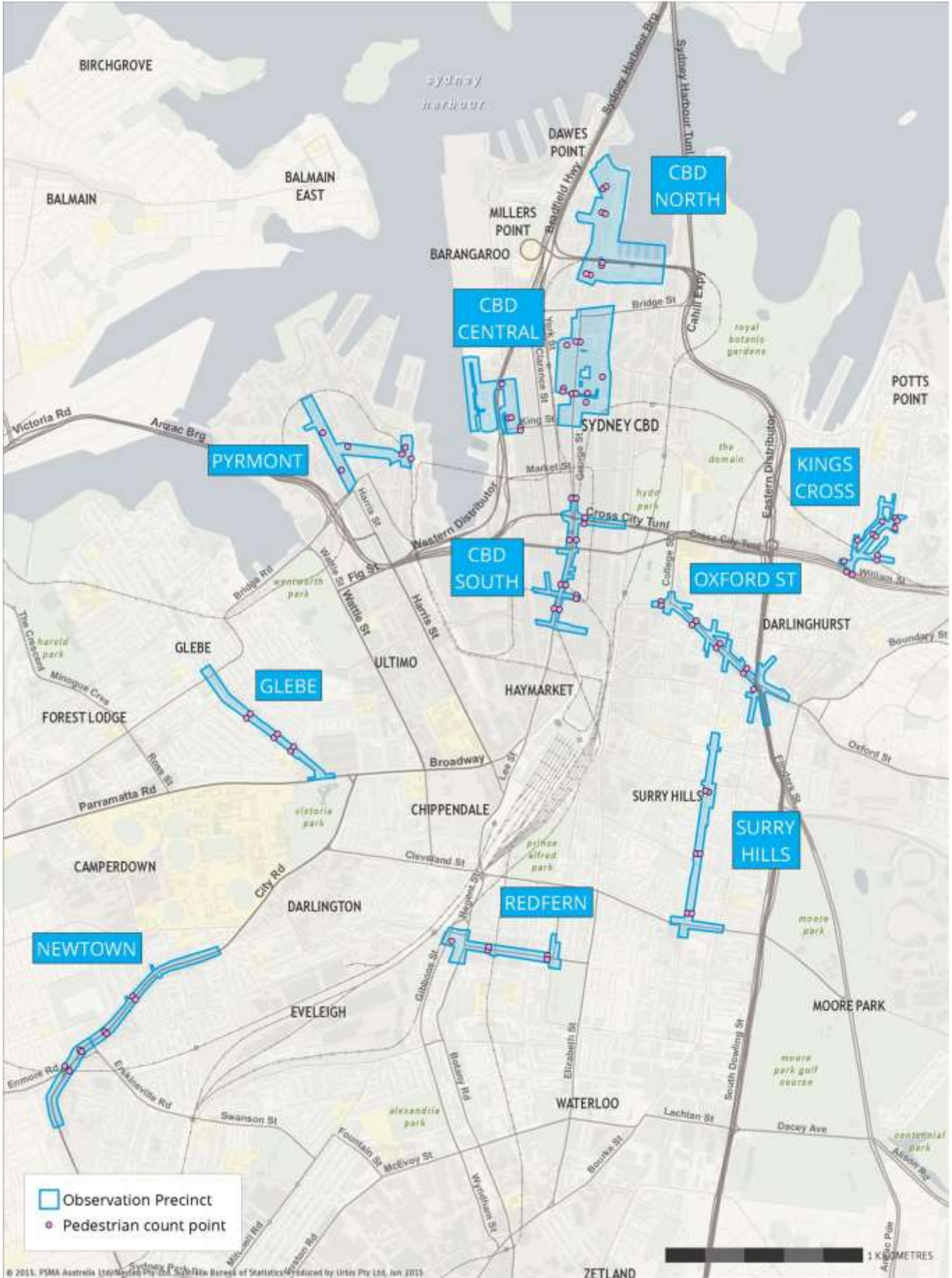
## Points to consider

The following should be considered when reading this report:

- This report is based on data collected over a limited timeframe of two typical evenings. It does not provide an audit of all activity in the City, or assume that every weekend through the year will have the same profile. It does provides a snapshot of late night activity in key precincts across the City
- When drawing comparisons between 2010, 2012 and 2015 data, it is important to note that changes have been made to the methodology of LNMAR over each phase. This has been taken into account and factored into the analysis
- This report acknowledges the introduction of “lockout” laws between 2012 and 2015, and provides comment on the potential influence on activity observed in the City. However it is not an evaluation of the effectiveness or impact of these measures
- Finally, this research cannot take into account external factors which may have influenced activity in the city during the survey periods, such as population growth over time, or temporary factors such as events, weather, building works or road closures.



Figure 3.1 – 2015 LNMAR Precincts and Count Points



# 4. Literature review

## Literature review summary

- Night time economies are key features of attraction in major cities world wide
- Deregulation of liquor laws since the 1980s has led to increased night time activity in major cities in Australia
- Effective management of night time economies is a challenge in urban contexts
- There are concerns regarding high level of alcohol consumption among young people and associated risks for themselves and others
- Predictors of alcohol related harm include pre-drinking or 'pre-loading'; the mixing of energy drinks and drug use with alcohol
- Perceptions of antisocial behaviour and fear for safety are seen as a deterrent for would be patrons of the night time economy
- Mixed use areas help diversify night time activities increasing the demographic range of participants and acting as a deterrent to antisocial behaviour
- Improved transport, well lit pedestrian access and better agency coordination have been used to manage some night time economies
- Evidence suggests legislative responses such as lockouts and reduced trading hours for licensed venues can reduce the incidents of assault.

## Introduction

This literature review builds on research previously undertaken by the City of Sydney in 2011<sup>2</sup>. It considers at national and international literature on late night

economies, and relevant legislative and management strategies.

## Key findings

### The Night Time Economy

Diverse night time economies bring cities to life and help to create liveable and active urban spaces. European cities traditionally cater for a range of needs through diverse uses including dining, drinking, entertainment, performance, arts and cultural activities.

In 2011 the City of Sydney noted the vision of many municipal governments for 24-hour cities, with an urban core populated by residents, workers and visitors around the clock<sup>3</sup>. This involves extending the business day to integrate it with the evening and night time economy, transforming '9 to 5' urban centres into holistic locations for residing, working, shopping and leisure. The planning principles of compact and mixed use development are central to the vision.

However, the negative aspects of night time activities can have detrimental impacts on the wider community. Managing the varying elements of the night time economy has been identified as a key task for authorities.

**“The development and management of the night time economy is one of the most important issues facing cities around the globe. It needs to be addressed in a range of different contemporary urban locations across Australia . . .”<sup>4</sup>**

### Issues facing the Night Time Economy

International research shows that much of the night time economy is dominated by young people. A major issue for the night time economy occurs when young adults drink to intoxication, creating a 'mono-culture' of young drinkers in certain areas. This places young people and others at risk of injury, crime and ill-health.<sup>5</sup>

There is a high societal cost related to alcohol consumption in terms of costs to the criminal justice system, the health system, loss of productivity and alcohol related road accidents. In monetary terms this was estimated to be more than double the taxes collected in Australia from alcohol taxation in 2010.<sup>6</sup>

The 2011 research by Hadfield found that a range of specific drinking behaviours led to increased harm. The

<sup>2</sup> Hadfield P. 2011

<sup>3</sup>Hadfield P., 2011, pp. 110-111

<sup>4</sup>Rowe D. et al, 2008, p.5

<sup>5</sup>Hadfield P., 2011, pp. 6,18,19

<sup>6</sup>Manning M., et al, 2013 p.5

availability of alcohol through extended licensing hours, drinking at home (pre-loading) before going out and mixing drugs with alcohol all lead to increased drunkenness and associated risk of harm or violence.

In 2012 the Commonwealth of Australia National Drug Law Enforcement Research Fund (NDLERF) found that levels of intoxication increase throughout the night, resulting in a substantial proportion of people in the NTE being intoxicated, particularly after 1am. As a result, violence and harm peaks between midnight and 3am, and is most frequent on Friday, Saturday and Sunday nights.<sup>7</sup>

The NDLERF identified key factors which increase the risk of alcohol-related harm:

- Pre-drinking is a major impediment to responsible service of alcohol and a significant predictor of harm
- As part of the pre-drinking culture, people often consume alcohol near licensed venues just prior to entering
- Energy drinks are associated with increased alcohol consumption and harm
- Illicit drug use is a significant predictor of greater violence and injury
- Lack of transport and lack of security in entertainment precincts increases the risk of harm.

There are 'hot-spots', 'hot-times' and 'flashpoints' which are spaces and times when a range of factors can lead to an increase in the risk of antisocial behaviour.<sup>8</sup> These can include pedestrians and intoxicated people clustering together in competition for resources such as food or transport.

Perceptions of antisocial behaviour and risks to personal safety act as a potential deterrent for would-be patrons of the night time economy including visitors, older people, young families and ethnic minorities. This is unfortunate as the presence of more socially and culturally diverse crowds can help to 'normalise' areas at night and reduce the risk of antisocial behaviour.<sup>9</sup>

With the separation of daytime, evening and night time activities become increasingly blurred and a major challenge is balancing the needs of diverse stakeholders, including residents, workers and visitors.<sup>10</sup>

### Responses to issues in the night time economy

There have been a range of responses to negative impacts arising from night time economies. These have included legislative, social and urban design responses.

Research shows that a well-balanced night time economy supports a range of uses that attract a diversity of people. The provision of mixed-use zones is therefore

key. An active, lively city needs to be safer and more welcoming in order to be more prosperous.

Hadfield's research found that the nature and volume of activity is influenced by:

- Physical capacity, distribution and trading hours of food, drink and entertainment outlets
- The availability of public transport
- The timing of public events and festivities.<sup>11</sup>

Different jurisdictions have implemented a range of strategies to manage aspects of the night time economy.

#### New South Wales

In 2008, the NSW Government introduced a Liquor Amendment (Special Licence Condition) Regulation, updated in 2011 to incorporate a 'three strikes' policy for at-risk licensed venues. At-risk venues are those identified by the NSW Bureau of Crime Statistics and Research (BOCSAR) as having a high incidence of assault associated with the premises.

In addition to these were the "Take the hint. Call it a night, without the fight." campaign launched 2010 by the NSW Police Force along with the NSW Government's 'Hassle Free Nights' initiative.

'Hassle Free Nights' includes a raft of measures aimed at providing locally tailored solutions to alcohol fuelled violence and antisocial behaviour. These measures covered a range of precincts – including Sydney Central, Manly, Wollongong, Newcastle, Hamilton and Parramatta – and sought a cooperative approach between NSW Police, councils, licensed premises and government agencies.

Key elements of this strategy were:

- Provision of late night transport options
- Precinct Liquor Accords
- Laws to reduce street drinking
- Health and safety information for patrons
- Tighter regulations for party buses, boats and karaoke bars
- Better training for bar staff and security guards
- Improved pedestrian management.

#### Newcastle

Between 2003 and 2008 the prevalence of alcohol-related crime increased significantly in the City of Newcastle (NSW). Assaults attended by police increased by 83%, with up to 65% of these related to licensed premises. The number of police call-outs to hotels increased from 105 in 2003 to 179 in 2007.

In March 2008 the former independent Liquor Administration Board (NSW) introduced a number of

<sup>7</sup>NDLERF, 2012

<sup>8</sup>Hadfield P., 2011, p.17

<sup>9</sup>Hadfield P., 2011, pp. 8, 44, 215, 217

<sup>10</sup>Greater London Authority, 2007, p.2, *passim* pp. 9-20

<sup>11</sup>Hadfield P., 2011, p.16

mandatory measures in response to alcohol fuelled violence and antisocial behaviour in Newcastle.

These measures included precinct wide 3am closures and 1am lockouts for late night licensed premises, many of which had been trading until 5am.

According to Newcastle Council the culture of drunken violence has been replaced by more diverse activity and the Hunter New England Health Service has indicated a -58% decrease in alcohol related violence since 2008.

**“Scores of cafes, boutique wine bars and restaurants sprang up in the CBD in the past 12 months, and people returned to the city for shopping and night time fun.”<sup>12</sup>**

Key elements of *The Newcastle Model: Safe Newcastle, Alcohol Management Strategy 2010-2013* include:

- Improved collaboration between relevant agencies
- More consistency between Development Applications (DA) and liquor licenses
- A new Development Control Plan for the NTE
- Collaboration with community groups
- Collaboration with Police and the University
- Extra lighting in the CBD, WalkSmart program with pathways and better lighting and an app to link people with safe transport home, and late night toilet options
- An annual review of Alcohol Free Zones
- “Consequence” policing taking a zero tolerance approach
- Liquor Accords including networked ID scanners in establishments.

### The City of Sydney NTE

A major deregulation of drinking laws in NSW in the last decade saw a proliferation of late-night and 24 hour venues throughout the City of Sydney, particularly in the areas of Kings Cross, Oxford Street and George Street.

This led to concerns regarding an out of control drinking culture among young people in Sydney and associated antisocial behaviour. Media reports of high profile assaults highlighted Sydney’s nightlife and drinking culture and brought it to the fore in social and political debates.

The City of Sydney’s research shows night time activities in the Sydney CBD predominantly involve young people. Only 6% of people in the City after 11pm are aged over 40 years<sup>13</sup>. Most businesses open after 11pm are pubs, taverns and bars.

Over recent years the City of Sydney has sought to develop strategies and action plans to provide better direction for the night time economy.

**“Sydney has an opportunity to match the diversity of choices available during the day into the evening. The extension of retail and cultural opportunities creates a viable transition from daytime to evening economies. Importantly, more diverse options can create a more inclusive night time city, improving safety and reducing levels of crime.”<sup>14</sup>**

OPEN Sydney has established key targets to be achieved by 2030, including:

- 40% of night time city users will be aged over 40
- 40% of businesses open after 6pm will be shops
- The annual night time economy turnover will double to \$30 billion
- There will be a 25% increase in night time economy jobs.

OPEN Sydney has pledged to support ‘anti-clustering’ – preventing large pubs and night clubs existing adjacent to one another, and encouraging smaller fine-grain shopping and dining spots. To this end, the NSW Government imposed a licence freeze in high density nightlife precincts in 2009, preventing the granting of new liquor licences and increases in size for existing licensed premises.

The City of Sydney also adopted Alcohol Free Zones and a network of CCTV cameras throughout the City. Use of ID scanners has also been introduced in pubs and clubs in Kings Cross. The City has also seen the provision of free bus services from Kings Cross to the CBD to connect with NightRider services after 1am on Friday and Saturday nights.

<sup>12</sup>Newcastle City Council, 2014

<sup>13</sup>City of Sydney, 2012, p.4

<sup>14</sup>City of Sydney, 2012, p.13

Kings Cross saw a decrease in recorded assaults between 2002 and 2012 (from 287 to 213)<sup>15</sup>. However, the deaths of 18 year old Thomas Kelly in 2012 and Daniel Christie in 2013 renewed calls for further measures to curb alcohol and drug fuelled violence in the Sydney CBD Entertainment Precinct and Kings Cross.

In 2014, the State Government introduced new controls across large parts of the city. These included:

- 1.30am lockouts and 3am last drinks for hotels, registered clubs and licensed karaoke bars across the CBD Entertainment Precinct. This area is presented in Figure 4.1 and stretches from Surry Hills and Darlinghurst to The Rocks, and from Kings Cross to Cockle Bay. (Venues currently licensed to stay open after 3am can do so without the service of alcohol)
- Banning identified 'troublemakers' from entry into licensed premises in Kings Cross and the Sydney CBD Entertainment Precinct
- Bans on the sale of take away alcohol after 10pm (NSW state-wide)
- A freeze on new liquor licences and approvals for existing licences across the Sydney CBD Entertainment Precinct and continuation of the existing freeze in Kings Cross
- Revoking of competency cards and disqualifications for bar staff breaching responsible service of alcohol requirements, and the suspension of on-line responsible service of alcohol training
- Introduction of a risk-based licence fee for all licensed premises (NSW state-wide).

Recent research by BOCSAR shows a significant reduction in assaults in Kings Cross (down 32%) and the CBD Entertainment Precinct (down 26%) since the introduction of the 2014 measures. There was also a 40% decline in assaults in George Street South.<sup>16</sup>

There was no evidence of any statistically significant increase in assaults in adjacent areas.

BOCSAR concluded that the January 2014 reforms appear to have reduced the incidence of assault in the Kings Cross and CBD Entertainment Precincts. The extent to which this is due to a change in alcohol consumption or a decrease in the number of people visiting these precincts is unknown.<sup>17</sup>

The effects of these measures on activity in the Sydney CBD and Kings Cross Entertainment Precincts may be further understood through the LNMAR 2015.

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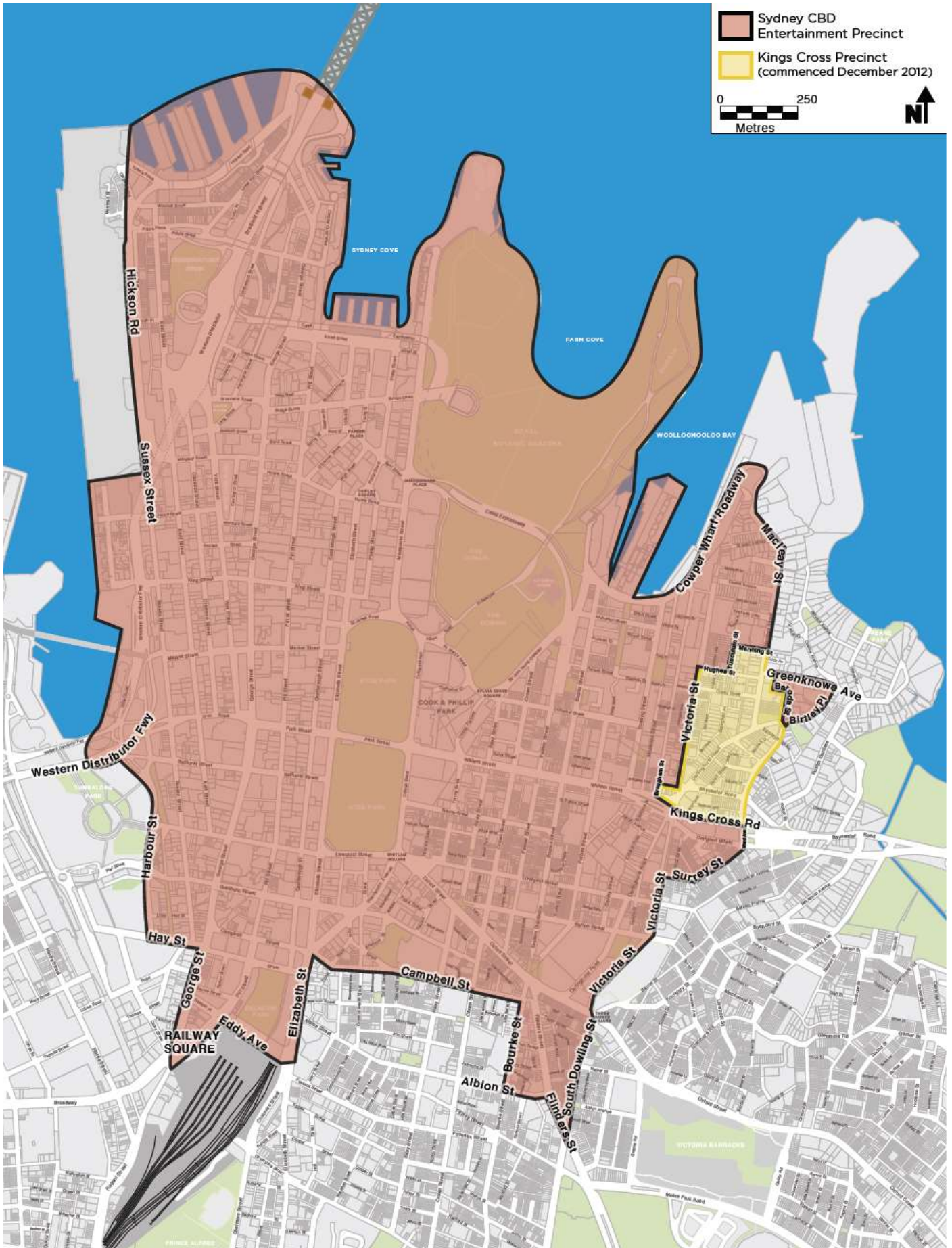
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<sup>15</sup>NDLERF, 2012, p. 15

<sup>16</sup>Menendez P. et al, 2015, p.7

<sup>17</sup>Menendez P. et al, 2015, p.1

Figure 4.1 – Sydney CBD Entertainment Precinct



# 5. Visitation Patterns

- Pedestrian numbers have decreased in almost all precincts. The exceptions were Newtown and South CBD, which saw an increase, and Surry Hills and Redfern, which remained relatively stable
- The largest decrease was in Kings Cross late at night (12-4am), and in Glebe across all periods.

## Introduction

A pedestrian count survey was conducted at a total of 84 locations across the city to assess pedestrian activity.

Table 5.1 below identifies the number of count points and timing for pedestrian counts in each precinct. Figure 3.1 in Section 3 presents the location of these count points.

**Table 5.1 – Pedestrian count points and times**

	Precinct	Count points	Friday Hours	Saturday Hours
Sydney CBD Entertainment Precincts	CBD Central	15	5pm – 4am	6pm – 4am
	CBD North	8	5pm – 4am	6pm – 4am
	CBD South	12	5pm – 4am	6pm – 4am
	Kings Cross	12	5pm – 4am	6pm – 4am
	Oxford Street	9	5pm – 4am	6pm – 4am
City Village Main Streets	Newtown	8	5pm – 4am	6pm – 4am
	Pymont	6	5pm – 4am	6pm – 4am
	Glebe	3	5pm – 1am	6pm – 1am
	Redfern	5	5pm – 1am	6pm – 1am
	Surry Hills	6	5pm – 1am	6pm – 1am

## Summary

- South CBD had the highest peak pedestrian counts (14,352), followed by CBD Central (4,576), Kings Cross (3,888) and Pymont (3,188)
- South CBD, Central CBD and Surry Hills were busiest on Friday; while North CBD, Kings Cross, Oxford Street and Newtown were busiest on Saturday
- All precincts were busiest in the evening (5-11pm), with the exception of Kings Cross and Oxford Street which were busiest during the night (11pm-1am)
- Pedestrian counts are influenced by business activity in the precinct:
  - All three CBD precincts were busiest when people were leaving work (6-8pm)
  - Kings Cross and Oxford Street are key night time entertainment precincts and were busiest on Saturday night (10pm-1am)
  - Newtown and Glebe, with numerous restaurants, were busiest in the early evening (6-8pm Friday and Saturday)
  - Pymont, with the Star Casino nearby, was busiest in the late evening (10-11pm)
- It is anticipated that significant drops in pedestrian numbers in Kings Cross and Oxford Street at 1am may be due to the “lockouts” which apply to the precincts after 1:30am.
- The lack of a secondary peak between 3-4am in Kings Cross and Oxford Street suggests that people are leaving the area around 1am, rather than staying in venues until closing times
- Compared to peak pedestrian counts in 2012, the 2015 survey shows:

Appendix A at the end of this report provides maps for each precinct identifying each of the pedestrian count points. At each count point, pedestrian numbers and the direction of travel was recorded at 15 minute intervals every hour, and then multiplied to provide an average hourly count for each location.

Pedestrian counts in the Surry Hills, Redfern and Glebe precincts were only conducted until 1am due to historically low pedestrian numbers at this time.

As in previous years, the analysis has focused on observing trends in the peak, or maximum, number of pedestrians recorded at any count point every hour, for each precinct. Analysis of peak pedestrian counts, rather than total pedestrian numbers, allows for comparison between precincts of different sizes.

As indicated in Figure 3.1 in Section 3, some count points have changed since the 2010 and 2012 survey periods. This has been taken into account in the analysis.

## Peak pedestrian counts

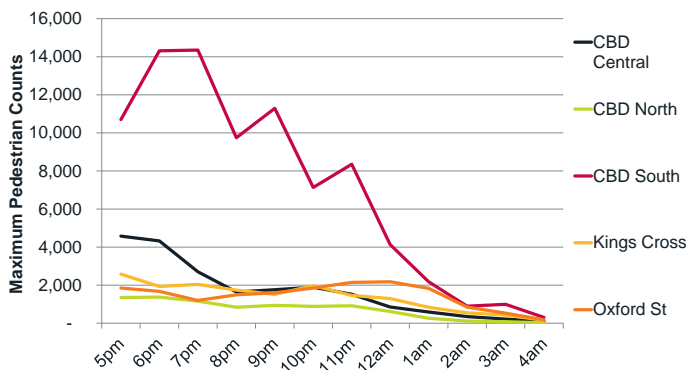
The precincts have been separated between those within the Sydney CBD Entertainment Precinct (CBD precincts, Kings Cross, and Oxford Street), and other City Village

Main Streets (Pyrmont, Newtown, Surry Hills, Glebe, and Redfern).

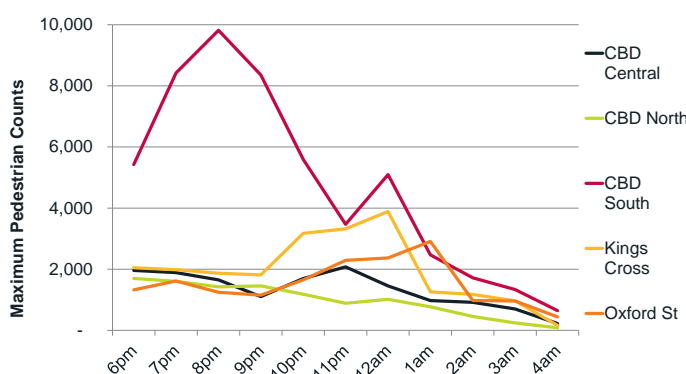
Charts 5.1 and 5.2 present the peak pedestrian counts recorded on Friday and Saturday respectively, for the Sydney CBD Entertainment Precincts. The charts show:

- On both Friday and Saturday, the CBD South precinct recorded larger maximum pedestrian counts compared to all other precincts during the early to mid-evening (5-11pm), reaching a peak of over 14,000 people between 6-7pm on Friday, and close to 10,000 at 8pm on Saturday
- The CBD South precinct has higher maximum pedestrian counts across all times of the evening (with the exception of 1am on Saturday)
- On Saturday, there is a distinct peak in pedestrian counts between 12-1am. At this time, the CBD South peaks at over 5,000 people, Kings Cross at almost 4,000 people, and Oxford Street at close to 3,000 people
- There is a noticeable decrease between 1-2am in these three precincts. This may be linked with the 'lockout' in the CBD Entertainment Precinct.

**Chart 5.1 – Entertainment Precinct maximum hourly pedestrian counts – Friday 2015**



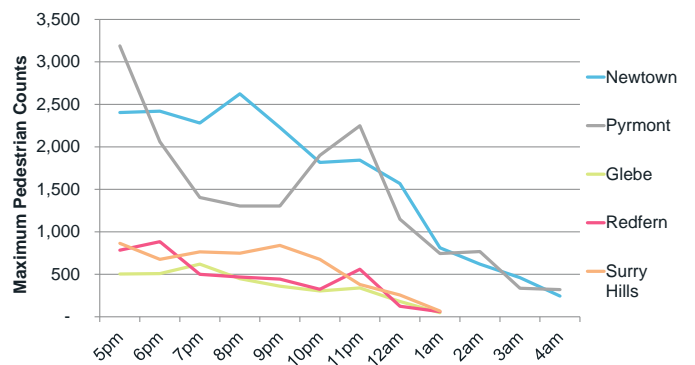
**Chart 5.2 – Entertainment Precinct maximum hourly pedestrian counts – Saturday 2015**



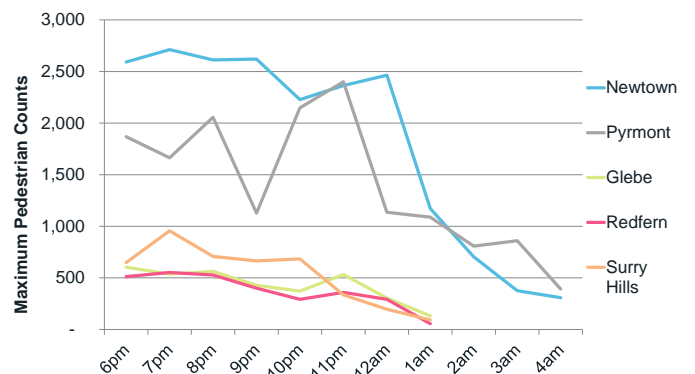
Charts 5.3 and 5.4 present the maximum pedestrian counts recorded on Friday and Saturday respectively, for each of the suburban precincts. These charts show:

- Pyrmont and Newtown were the busiest city villages during the night with similar peak pedestrian profiles on Friday and Saturday nights
- On Friday, pedestrian numbers in Newtown peak at 8pm (2,600 people) and Pyrmont observes a distinct peak at 11pm (2,250 people)
- On Saturday, Pyrmont again peaks at 11pm (2,400) and Newtown at 12am (2,460)
- On Friday and Saturday nights, in both Newtown and Pyrmont, pedestrian counts continue to decline between 12am-1am
- Redfern, Surry Hills, and Glebe all observed the lowest peak pedestrian counts (all below 1,000).

**Chart 5.3 – City Villages maximum hourly pedestrian counts – Friday 2015**



**Chart 5.4 – City Villages maximum hourly pedestrian counts – Saturday 2015**



Figures 5.1 and 5.2 overleaf present the peak pedestrian count locations on Friday and Saturday. These hot spot maps show:

- On Friday, the CBD South is the busiest and Glebe is the quietest precinct



- On Saturday, the CBD South is relatively busy, as are pockets of Oxford Street and Kings Cross.

Figure 5.1 – Peak pedestrian counts – Friday

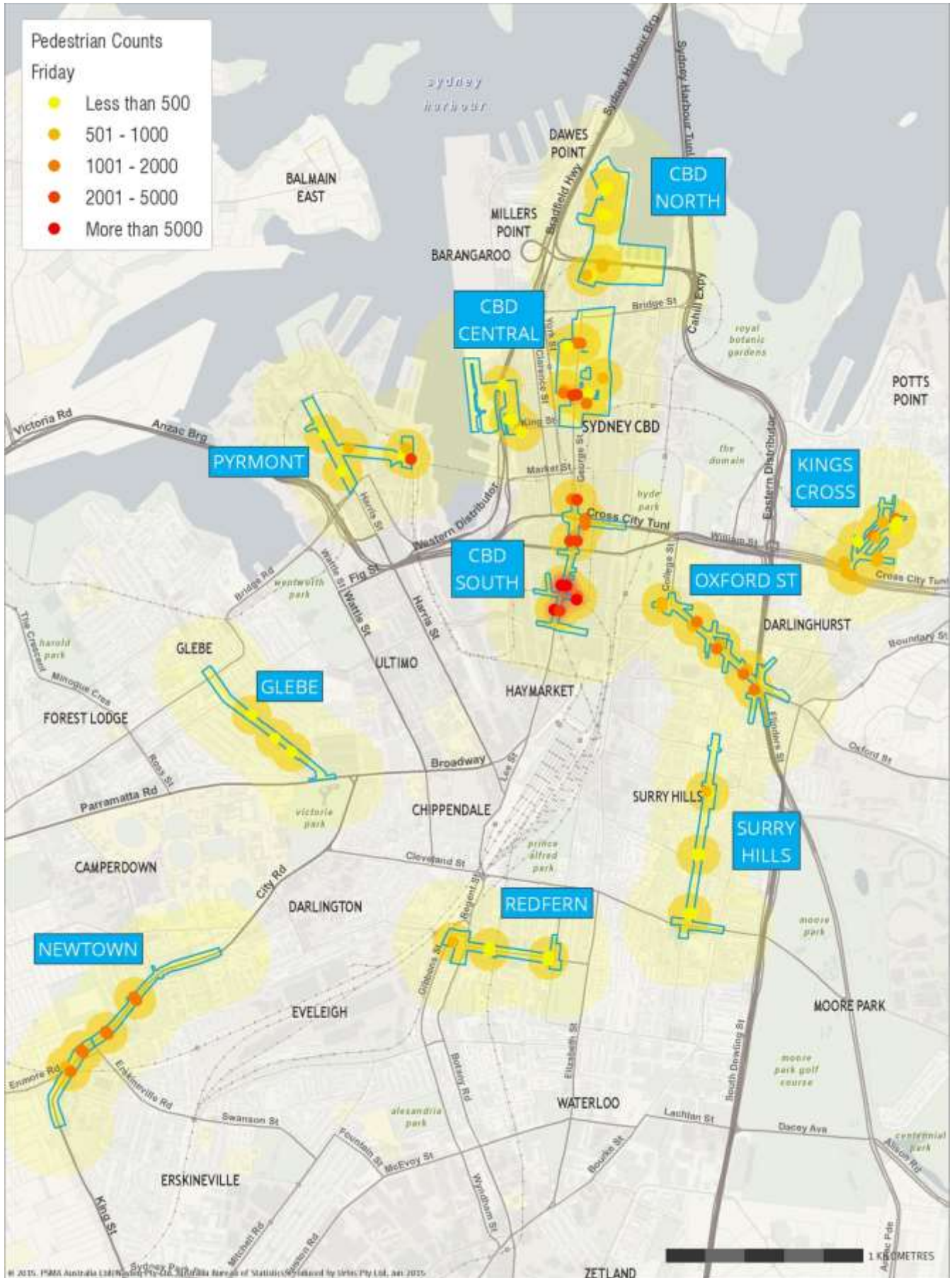
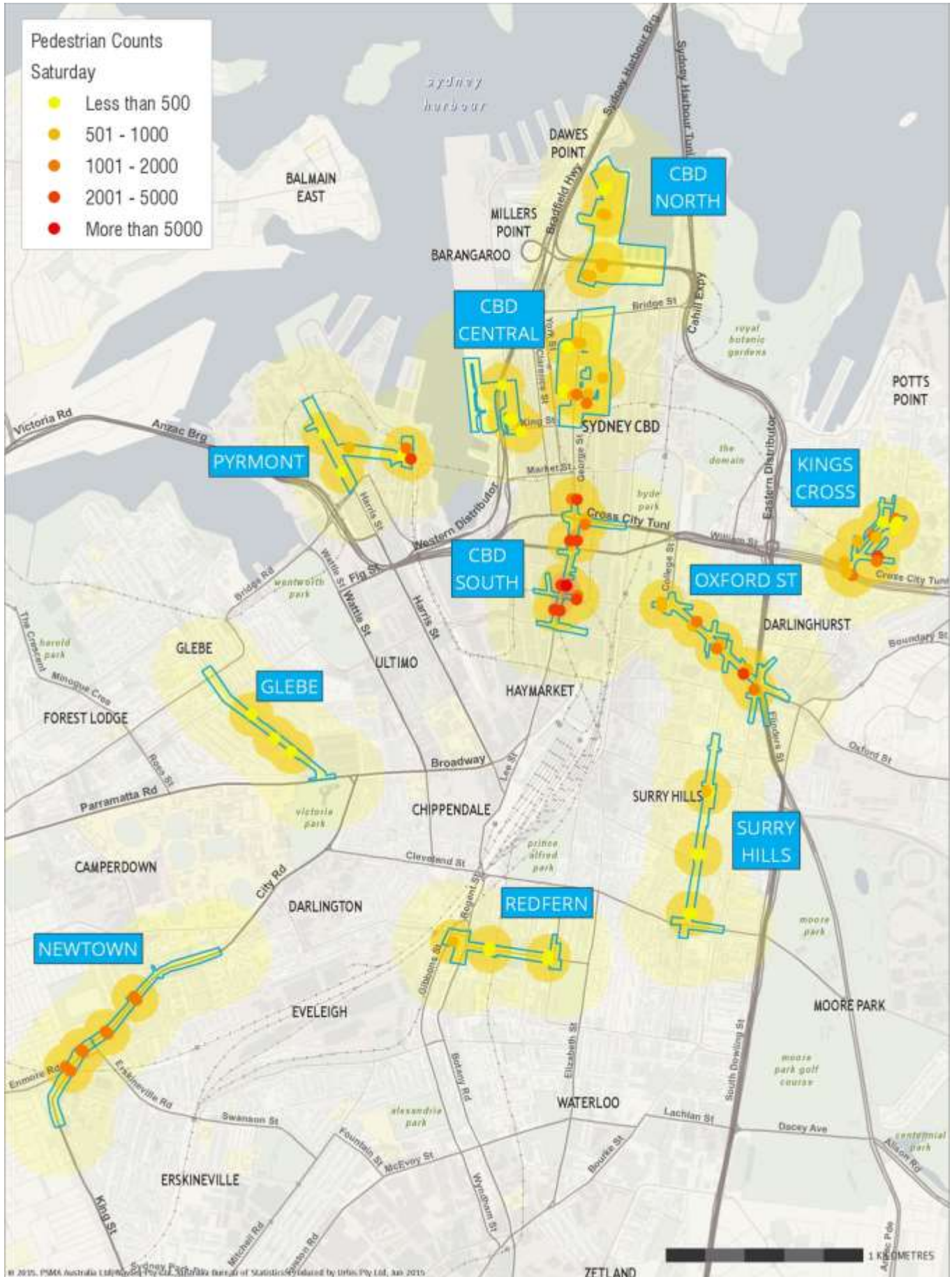


Figure 5.2 – Peak pedestrian counts – Saturday

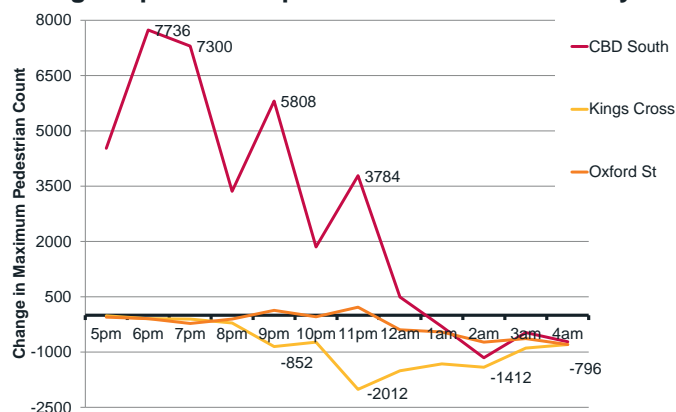


**Comparison with 2012 counts**

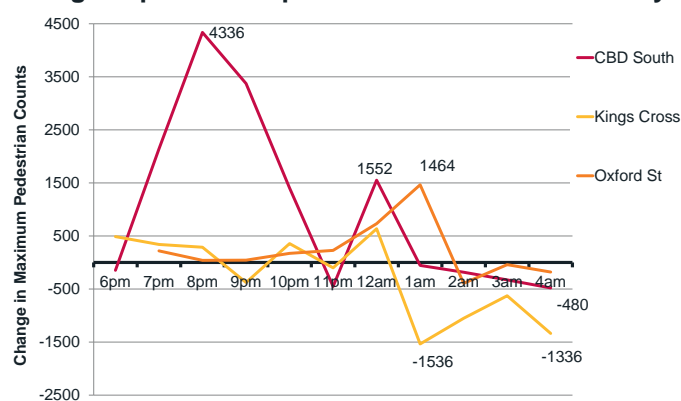
Charts 5.5 and 5.6 present the change in the peak pedestrian counts recorded in the Sydney CBD Entertainment Precincts between 2015 and 2012 for on Friday and Saturday respectively. These show:

- The CBD South observed a large increase in peak pedestrian numbers on Friday between 6-11pm, peaking at 7,700 more pedestrians (+118%) at 6pm
- Kings Cross observed a large decrease in peak pedestrian counts, with 2,000 fewer pedestrians (-58%) in the precinct at 11pm
- After 1am, all precincts observed a decrease in peak pedestrian counts. By 4am decreases of 800 people in Kings Cross (-84%) and Oxford Street (-82%) and 720 people in CBD South (-70%) were observed
- On Saturday, CBD South again observed large increases in the early evening, peaking at over 4,300 more pedestrians (+79%) at 8pm compared to 2012
- On Saturday distinct peaks of activity were observed at 12am in CBD South (1,550 more people, or +20%), and Kings Cross (630 more people, or +20%), and at 1am for Oxford Street (1,460 more people, +101%)
- After 12am, all precincts observed a decrease in pedestrian counts compared to 2012, most noticeably in Kings Cross at 1am (1,530 fewer people, or -55%).

**Chart 5.5 – Sydney CBD Entertainment Precincts change in pedestrian peaks 2012 to 2015 – Friday**



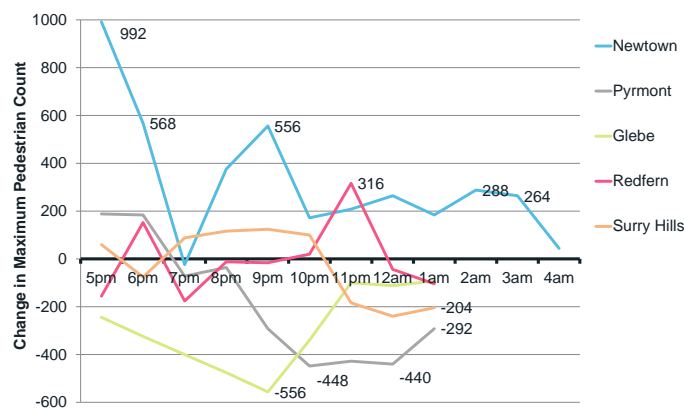
**Chart 5.6 – Sydney CBD Entertainment Precincts change in pedestrian peaks 2012 to 2015 – Saturday**



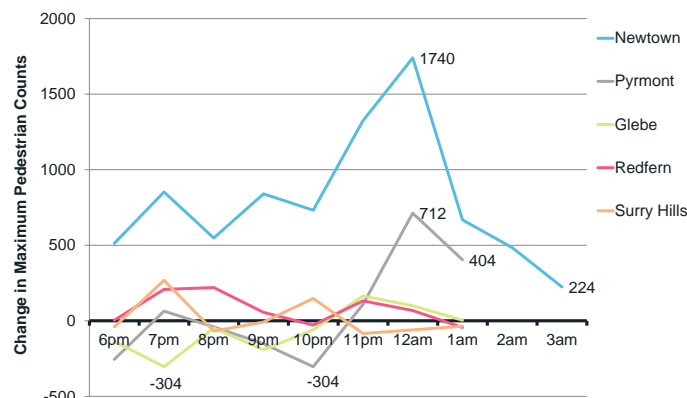
Charts 5.7 and 5.8 present the change in peak pedestrian counts recorded in the City Village Main Streets between 2012 and 2015. These show that compared to 2012:

- Newtown observed increases in peak pedestrian counts across all times on Friday, peaking at over 990 more people at 5pm, and remaining at over 260 people more by 3am
- Surry Hills and Redfern also observed increases in the mid-evening, peaking at 11pm in Redfern with 316 more people
- Glebe and Pyrmont observed large decreases compared to 2012, with 550 fewer people in Glebe at 9pm, and 450 fewer in Pyrmont at 10pm
- On Saturday, again, Newtown observed increases in peak pedestrian counts across the night, peaking at 12am with 1,700 more pedestrians
- Pyrmont also observed a large increase at 12am with 700 more pedestrians.

**Chart 5.7 – City Village Main Streets change in pedestrian peaks 2012 to 2015 – Friday**



**Chart 5.8 – City Village Main Streets change in pedestrian peaks 2012 to 2015 – Saturday**



### Precinct profiles

The following section provides a summary of the maximum (or peak) pedestrian counts recorded in each precinct during LNMAR 2015. This also identifies the busiest areas in each precinct, change in pedestrian numbers throughout the night, and compares 2015 data with 2012 data for the same areas.<sup>18</sup>

### Sydney CBD Entertainment Precincts

#### CBD Central

CBD Central includes Martin Place, areas of George and Pitt Street, as well as King and Sussex Streets, towards Darling Harbour. This area is characterised by a large concentration of commercial premises. Figure A1 in Appendix A presents a map of the precinct.

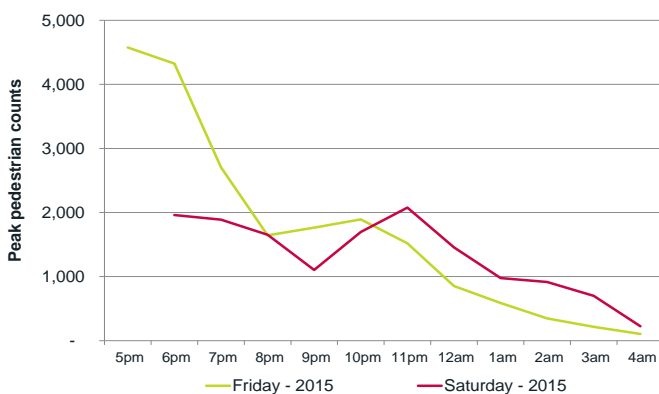
Table 5.2 indicates that all of the top five busiest times in the CBD Central were recorded in the early evening (5-7pm) on Friday. The busiest locations were along Martin Place and on George Street (between Wynyard and Barrack Streets). These peaks are likely to have been influenced by work departure times in the evening, centred around Wynyard and Martin Place train stations.

**Table 5.2 – Top 5 hot spots CBD Central**

Location	Day	Hour	Count
Martin Place	Friday	17:00	4,576
George St – near Barrack St	Friday	18:00	4,324
George St – near Curtin PI	Friday	18:00	3,484
George St – near Curtin PI	Friday	17:00	3,200
George St – near Curtin PI	Friday	19:00	2,704

Chart 5.9 presents the pattern of maximum pedestrian counts on both Friday and Saturday in CBD Central. On Friday, pedestrian activity declines rapidly after 6pm, with a more gradual decline between 10pm-4am. Pedestrian counts were higher on Saturday for most of the night, with pedestrian counts peaking at 11pm.

**Chart 5.9 – CBD Central pedestrian peaks 2015**



<sup>18</sup>The analysis takes into account the difference between count points in 2012 and 2015. CBD Central and CBD North were not included in the

#### CBD North

CBD North includes Circular Quay, a major transport hub, and surrounding commercial and tourist destinations such as The Rocks. Figure A2 in Appendix A presents a map of the precinct.

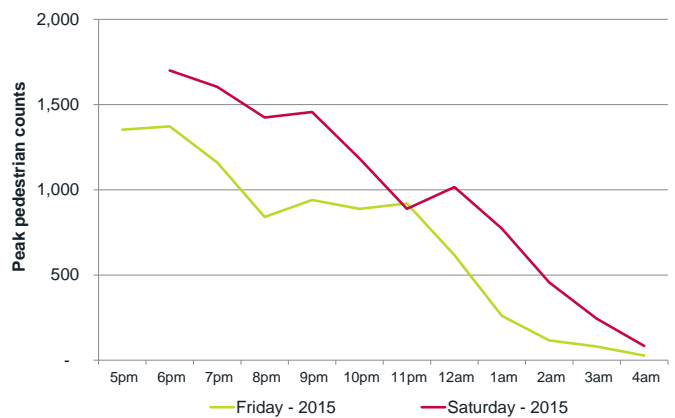
Unlike most other areas in the City, the busiest time in CBD North was on Saturday in the early to mid-evening (6-9pm) on George St and Alfred St near Circular Quay. These peaks are likely to have been influenced by tourist and visitor activity at the Circular Quay transport hub.

**Table 5.3 – Top 5 hot spots CBD North**

Location	Day	Hour	Count
George St – near Essex St	Saturday	18:00	1,700
Alfred St – near Circular Quay	Saturday	19:00	1,604
Alfred St – near Circular Quay	Saturday	21:00	1,456
Alfred St – near Circular Quay	Saturday	20:00	1,424
George St – near Essex St	Friday	18:00	1,372

Chart 5.10 indicates that CBD North was generally busier on Saturday for much of the evening. On Friday, pedestrian counts remained stable between 8 – 11pm, before decreasing gradually later in the night. On Saturday pedestrian counts increase slightly at 12am before decreasing again later in the night.

**Chart 5.10 – CBD North pedestrian peaks 2015**



#### CBD South

CBD South includes large parts of George Street – along the Queen Victoria Building and Town Hall – and Liverpool Street. This area is characterised by a diversity of commercial, retail, residential and accommodation uses, as well as entertainment activity (including the World Square Shopping Centre and George Street Cinema complex). The precinct also includes Town Hall Train Station. Figure A3 in Appendix A presents a map of the precinct.

In 2015, CBD South observed higher peak pedestrian counts compared to all other precincts, particularly in the early to mid-evening (5-9pm). Table 5.4 shows that four of

2012 survey. This also notes that Surry Hills, Redfern and Glebe were only counted until 1am as pedestrian numbers are very low after this.

the top five busiest times in the precinct were on Friday. These were in early to mid-evening, on south George Street close to the intersection with Liverpool Street. This area is characterised by a number of bars, restaurants and accommodation venues. These peaks are likely to have been influenced by after-work activities along this major thoroughfare and centre.

**Table 5.4 – Top 5 hot spots CBD South**

Location	Day	Hour	Count
George St – near Liverpool St	Friday	19:00	14,352
George St – near Liverpool St	Friday	18:00	14,312
George St – near Liverpool St	Friday	21:00	11,288
George St – near Liverpool St	Friday	17:00	10,700
George St – near Liverpool St	Saturday	20:00	9,816

Chart 5.11 indicates that on Friday, CBD South observed a peak between 6-7pm, and again at 9pm and 11pm. After 11pm, Friday pedestrian counts dropped rapidly. Saturday counts peaked at 8pm and decreased rapidly to 11pm. They peaked again at 12am, before a gradual decrease.

**Chart 5.11 – CBD South pedestrian peaks 2015**

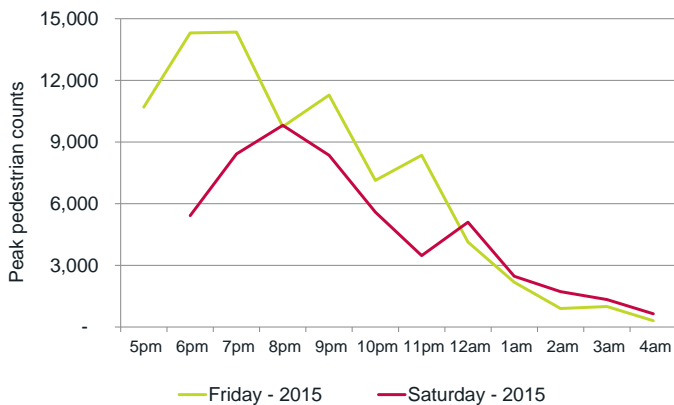
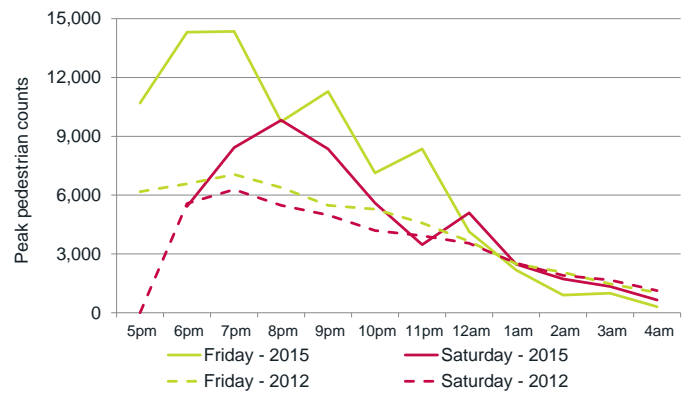


Chart 5.12 indicates that CBD South observed an overall increase in peak pedestrian counts between 2012 and 2015. The largest increase was at 6pm on Friday (+118%), however pedestrian numbers were smaller later at night with -70% fewer pedestrians seen at 4am on Friday compared to 2012.

**Chart 5.12 – CBD South pedestrian peaks 2012 vs 2015**



**Kings Cross**

Kings Cross has a significant cluster of licensed premises and has traditionally been the main focus of the NTE in the City. The precinct includes the areas along Darlinghurst Road, Victoria Street, Bayswater Road, and Kings Cross Road. Figure A4 in Appendix A presents a map of the precinct.

Table 5.5 indicates that in 2015 the precinct was busiest at midnight (12am) on Saturday. Activity generally peaked between 10pm-12am along Bayswater Road, which is the primary location for licensed venues in the precinct. A peak was also seen on Friday at 5pm along Darlinghurst Road (near the Kings Cross Library). This is likely to have been influenced by people leaving work and commuting via Kings Cross Station.

**Table 5.5 – Top 5 hot spots Kings Cross**

Location	Day	Hour	Count
Bayswater Rd – near Kellett St	Saturday	00:00	3,888
Bayswater Rd – near Kellett St	Saturday	23:00	3,320
Bayswater Rd – near Kellett St	Saturday	22:00	3,176
Darlinghurst Rd – near Library	Friday	17:00	2,584
Darlinghurst Rd – near Library	Saturday	22:00	2,168

Chart 5.13 shows a distinct spike in peak pedestrian counts on Saturday, reaching 3,888 at midnight, before decreasing rapidly to 1,260 by 1am. This is equivalent to a -68% drop in peak pedestrian counts between 12am – 1am. It is anticipated that this significant drop may be due to the “lockouts” which apply in the precinct after 1:30am.

After 1am, peak pedestrian counts continued to decline to 4am, with fewer than 200 pedestrians recorded on either night. This suggests that many patrons are leaving the area, rather than entering and remaining in venues until the 3am “last drinks”.

**Chart 5.13 – Kings Cross pedestrian peaks 2015**

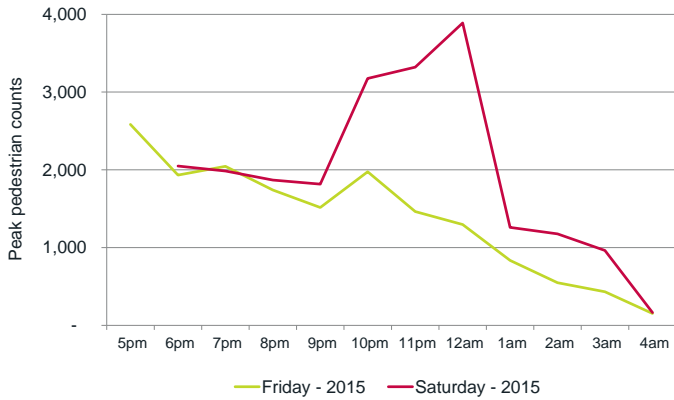
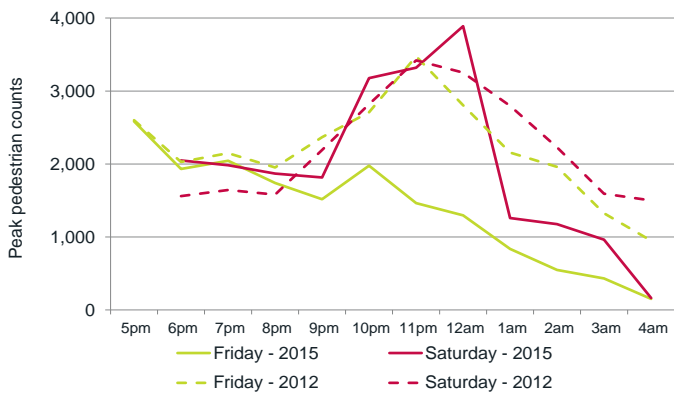


Chart 5.14 indicates that on Friday peak pedestrian counts were lower compared with 2012. The greatest difference occurred between 10pm – 4am, with over 2,000 fewer people recorded at 11pm (-58%) and close to 800 fewer people at 4am (-89%). On Saturday, the greatest difference occurred at 12am with over 600 more people in Kings Cross at any one point (+20%), followed by a sharp decrease to 1,500 fewer people (-55%) at 1am compared to 2012. Again it is anticipated that change between 2015 and 2012 may be due to the lock out restrictions.

**Chart 5.14 – Kings Cross pedestrian peaks 2012 vs 2015**



**Oxford Street**

Oxford Street is a main transport route and access point between the CBD and adjacent precincts of Kings Cross and Surry Hills. The precinct includes a cluster of licensed premises and is also a NTE destination, secondary to Kings Cross. Figure A5 in Appendix A presents a map of the precinct.

Oxford Street was busiest on Saturday in the late evening (11pm-1am) along Oxford Street near Palmer Street.

**Table 5.6 – Top 5 hot spots Oxford Street**

Location	Day	Hour	Count
Oxford St – near Palmer St	Saturday	01:00	2,908
Oxford St – near Palmer St	Saturday	00:00	2,368
Oxford St – near Palmer St	Saturday	23:00	2,292
Oxford St – near Pelican St	Saturday	00:00	2,248
Oxford St – near Palmer St	Friday	00:00	2,180

Chart 5.15 indicates that, similar to the Kings Cross precinct, pedestrian counts in Oxford Street increase rapidly through the night to a peak at 1am of 2,908 people, before decreasing rapidly to 980 at 2am. This is equivalent to a -66% drop in peak pedestrian counts. This suggests that people are attracted to the area until the 'lockouts' at 1.30am. The lack of a secondary peak between 3-4am suggests that people are leaving the area, rather than staying in venues until closing times.

**Chart 5.15 – Oxford St pedestrian peaks 2015**

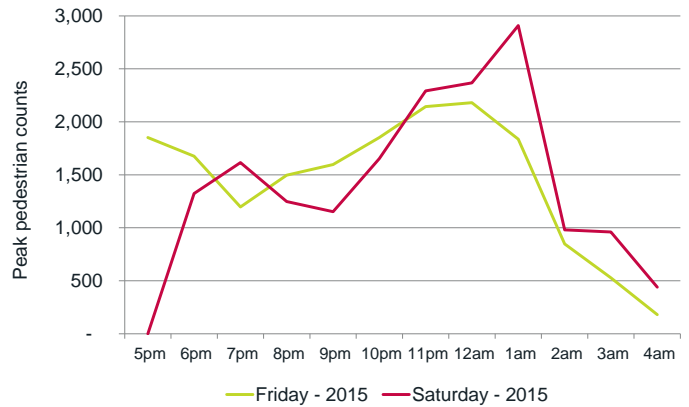
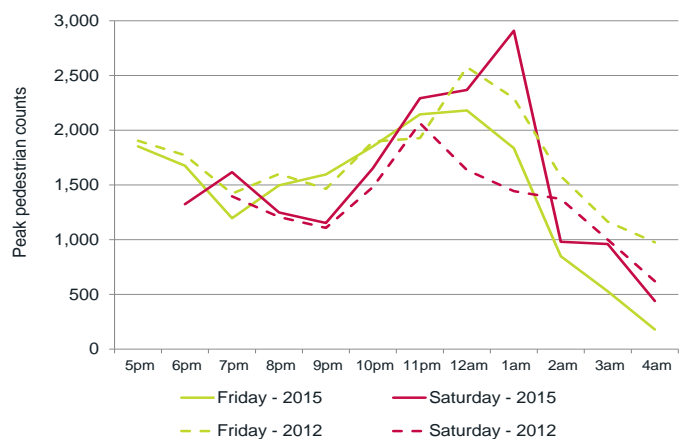


Chart 5.16 indicates that between 2012 and 2015 there has been an overall decline in peak pedestrian counts on Friday and an overall increase on Saturday. The greatest decline was observed on Friday at 4am with peak pedestrian counts down by close to 800 people (-82%). The greatest increase occurred on Saturday at 1am, with 1,400 more people at any one point (+101% since 2012).

**Chart 5.16 – Oxford Street pedestrian peaks 2012 vs 2015**



**City Village Main Streets**

It is important to note that unlike the CBD Entertainment Precincts, the "lockout" restrictions to licensed premises do not apply in the City Village Main Street precincts.

**Pyrmont: Harris and Union Streets**

Harris and Union Streets are characterised by a mix of residential properties, with large leisure destinations nearby – Darling Harbour and the Star Casino. Pyrmont

was busiest near the entrance to Pyrmont Bridge on both nights<sup>19</sup>. Figure A6 in Appendix A presents a map of the precinct.

The busiest times were during the early evening (5-6pm) on Friday and the late evening (10-11pm) on both nights. The Friday early evening peaks are likely to have been influenced by people leaving work. The Friday and Saturday late evening peaks maybe influenced by patrons visiting the Star Casino.

**Table 5.7 – Top 5 hot spots Pyrmont**

Location	Day	Hour	Count
Entrance to Pyrmont Bridge	Friday	17:00	3,188
Entrance to Pyrmont Bridge	Saturday	23:00	2,400
Entrance to Pyrmont Bridge	Friday	23:00	2,248
Entrance to Pyrmont Bridge	Saturday	22:00	2,148
Entrance to Pyrmont Bridge	Friday	18:00	2,060

Chart 5.17 shows peaks in pedestrian counts in Pyrmont at 10pm on Friday 844 and at 12am on Saturday 1,048. These peaks decrease rapidly at 1am – to 356 on Friday and 580 on Saturday – equivalent to a -58% and -45% decrease respectively. This is similar to the patterns observed in Kings Cross and Oxford Street.

**Chart 5.17 – Pyrmont pedestrian peaks 2015**

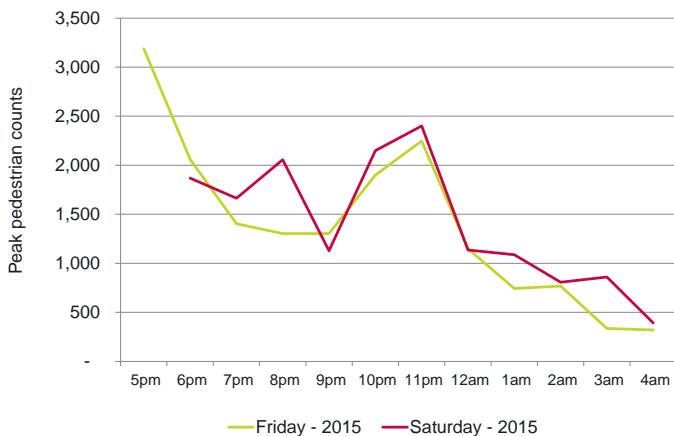
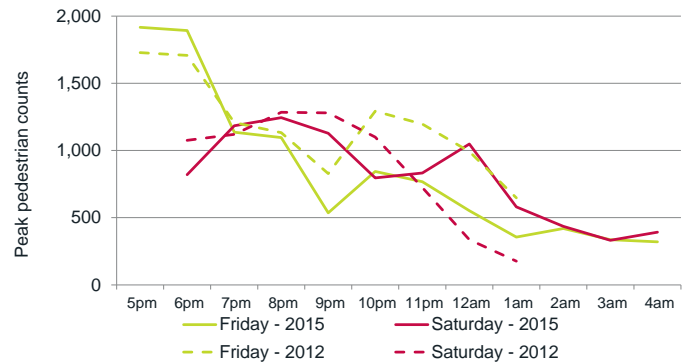


Chart 5.18 indicates an overall decline in peak pedestrian counts between 2012 and 2015 in Pyrmont. There were -45% less pedestrians at 1am on Friday in 2015, compared to 2012. Counts increased between years on Saturday after 11pm, with +230% more pedestrians at 1am in 2015.

**Chart 5.18 – Pyrmont pedestrian peaks 2012 vs 2015**



**Newtown: King Street**

King Street is characterised by a large number of shops, restaurants, takeaways, licensed venues and key attractions (such as the Dendy Cinemas) in close proximity to residential areas and Newtown Train Station. All pedestrian count points in the precinct were along King Street (i.e. between Erskineville Road and Watkin Street). Figure A7 in Appendix A presents a map of the precinct.

The precinct was busiest on Saturday in the early evening. It is likely that these peak pedestrian counts are due to patrons visiting nearby bars, restaurants, shops and entertainment venues.

**Table 5.8 – Top 5 hot spots Newtown**

Location	Day	Hour	Count
Between Church St & Mary St	Saturday	19:00	2,712
Near Newtown Station	Saturday	19:00	2,704
Between Eliza St & Mary St	Saturday	19:00	2,660
Between Eliza St & Mary St	Friday	20:00	2,624
Between Church St & Mary St	Saturday	21:00	2,620

Chart 5.19 shows that Newtown has a similar profile of peak pedestrian counts on both Friday and Saturday. Similar to other entertainment precincts, pedestrian counts spike at 12am on Saturday, reaching 2,464 people, before dropping rapidly to 1,172 by 1am, equivalent to a -52% decrease. Numbers continue to decline after 1am.

<sup>19</sup> It should be noted that this is a new pedestrian count point for 2015 and has been excluded from any comparisons with 2012 data.



**Chart 5.19 – Newtown pedestrian peaks 2015**

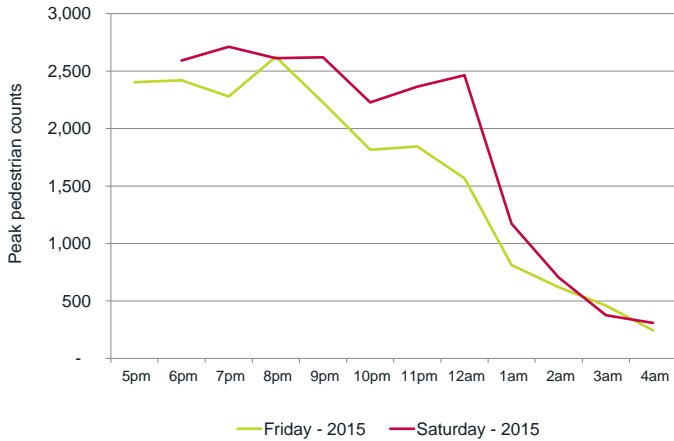
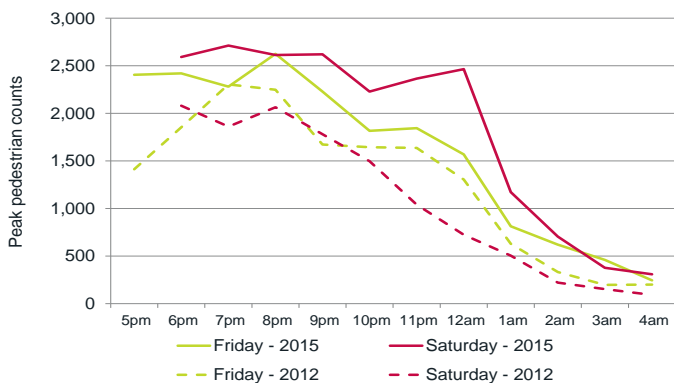


Chart 5.20 indicates that Newtown has observed an increase in peak pedestrian counts between 2012 and 2015. The greatest increases were observed at 12am on Saturday night, with over 1,700 more pedestrians at any one point. This is equivalent to +204% increase in peak numbers. This suggests that Newtown is attracting more patrons on Saturday nights, compared to 2012 when Friday was the busiest evening.

**Chart 5.20 – Newtown pedestrian peaks 2012 vs 2015**



**Surry Hills: Crown Street**

Crown Street is situated within the residential suburb of Surry Hills and is characterised by a number of restaurants and licensed premises. Figure A8 in Appendix A presents a map of the precinct.

The precinct was busiest in the early to mid-evening (5-9pm) along Crown Street (near Foveaux St). It is likely that this has been influenced by patrons visiting nearby bars and restaurants.

**Table 5.9 – Top 5 hot spots Surry Hills**

Location	Day	Hour	Count
Crown St – near Foveaux St	Saturday	19:00	956
Crown St – near Foveaux St	Friday	17:00	864
Crown St – near Foveaux St	Friday	21:00	840
Crown St – near Foveaux St	Friday	19:00	764
Crown St – near Foveaux St	Friday	20:00	748

Chart 5.21 indicates that in Surry Hills pedestrian counts peak on Saturday during the early evening at 7pm and again at 10pm, before falling to less than 100 at 1am. Peak counts on Friday follow a similar pattern, although counts peak earlier at 9pm, before declining into the evening.

**Chart 5.21 – Surry Hills pedestrian peaks 2015**

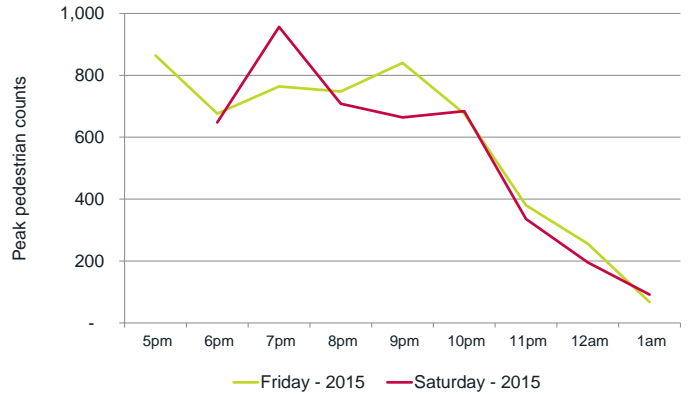
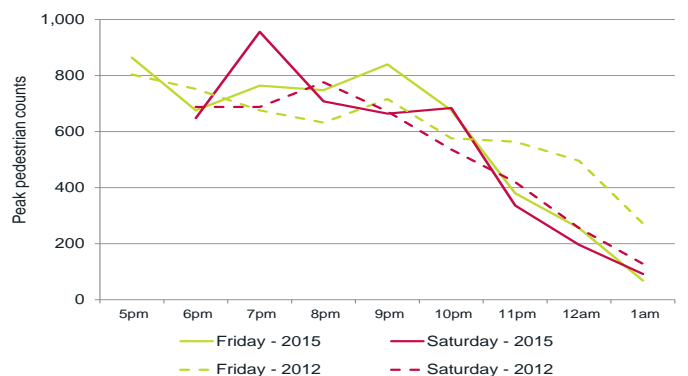


Chart 5.22 indicates that the greatest increase in peak pedestrian counts was observed at 7pm on Saturday night, with 260 more pedestrians (+39%). The largest decreases occurred on Friday night between 11pm – 1am, with 240 fewer peak pedestrians at 12am compared with 2012 (-48% decrease).

**Chart 5.22 – Surry Hills pedestrian peaks 2012 vs 2015**



**Redfern: Redfern Street**

The Redfern precinct includes count points along Redfern Street between Redfern Train Station and Redfern Park. The precinct is a highly urbanised residential suburb which has a small but growing restaurant, café and a small bar precinct along Redfern Street. Sydney University is located nearby. Figure A9 in Appendix A presents a map of the precinct.

The precinct was busiest near the train station in the early evening (5-6pm) on Friday. This is likely to have been influenced by people commuting after work or University. A peak in activity was also seen at 11pm on Friday, which may have been influenced by patrons leaving small bars at this time to return home.

**Table 5.10 – Top 5 hot spots Redfern**

Location	Day	Hour	Count
Between Gibbons & Regent St	Friday	18:00	884
Between Gibbons & Regent St	Friday	17:00	784
Between George & Renwick St	Friday	17:00	612
Between George & Renwick St	Friday	18:00	572
Between Gibbons & Regent St	Friday	23:00	560

Chart 5.23 shows peaks on Friday between 5-6pm, and at 11pm. Saturday observes a similar pattern in peak pedestrian counts between 7-10pm.

**Chart 5.23 – Redfern pedestrian peaks 2015**

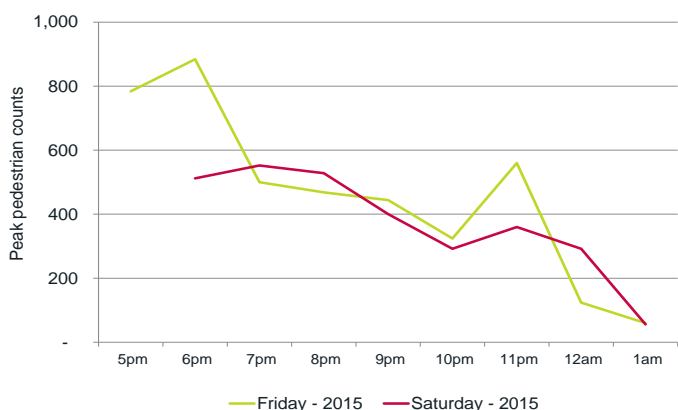
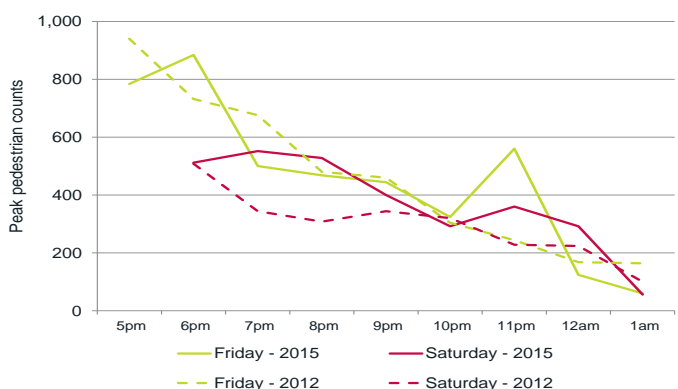


Chart 5.24 indicates that the largest difference in peak pedestrian counts between 2012 and 2015 occurred at 11pm on Friday, with a peak of more than 300 more people compared to 2012 (130%).

**Chart 5.24 – Redfern pedestrian peaks 2012 vs 2015**



**Glebe: Glebe Point Road**

Glebe is a residential suburb with a high concentration of restaurants, licensed venues and late-trading shops on Glebe Point Road. All pedestrian count points were located along Glebe Point Road. Sydney University is located nearby. Figure A10 in Appendix A presents a map of the precinct.

Table 5.11 indicates that Glebe was busiest on Friday and Saturday in the early evening (6-8pm) along the full length of Glebe Point Road observed (i.e. between Derby Place

and Norton St). This may be influenced by patrons visiting nearby bars, restaurants and shops.

**Table 5.11 – Top 5 hot spots Glebe**

Location	Day	Hour	Count
Between Derby Pl & Derwent Ln	Friday	19:00	620
Between Cowper St & Mitchell St	Saturday	18:00	604
Between Cowper St & Mitchell St	Saturday	20:00	564
Between Norton St & Mitchell St	Saturday	20:00	544
Between Cowper St & Mitchell St	Friday	19:00	540

Chart 5.25 shows that both Friday and Saturday nights have similar profile of peak pedestrian counts. Both nights experience a peak between 7-8pm, and a distinct peak again at 11pm, before decreasing late into the night.

**Chart 5.25 – Glebe pedestrian peaks 2015**

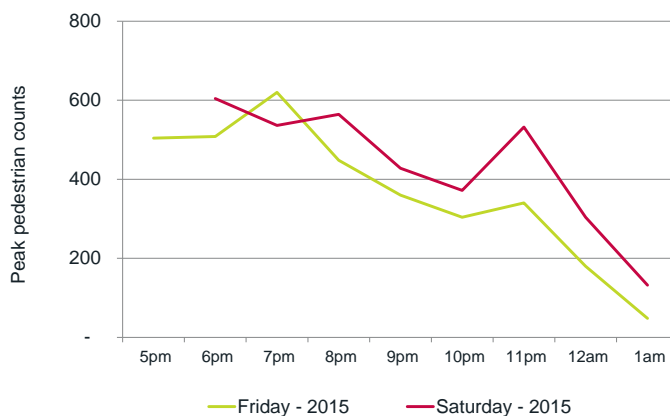
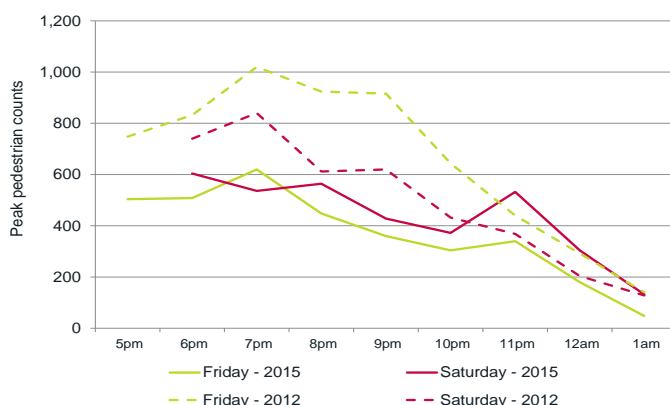


Chart 5.26 indicates that peak pedestrian counts were lower in 2015 compared to 2012 at all times, with the exception of Saturday after 11pm. The largest decrease was observed at 5pm on Friday with 368 fewer people (-52%).

**Chart 5.26 – Glebe pedestrian peaks 2012 vs 2015**



# 6. Observed behaviours

## Summary

- In total 1,465 incidents of antisocial behaviour (ASB) were recorded across all precincts. Over half (52%) were non-serious incidents
- The number of observed serious and less serious ASB incidents has decreased by 80% since 2010. The proportion of serious to less serious incidents has remained relatively constant
- Kings Cross still had the highest proportion of serious incidents (30%)
- When ASB density was compared between 2012 and 2015, Kings Cross observed the largest decreases in the number of incidents, while Redfern observed the largest increase per 1,000 people
- CBD South observed the highest number of incidents on Friday, while Kings Cross observed the highest number of incidents on Saturday

## Antisocial behaviour

### Type of antisocial behaviour

In total 1,465 incidents were recorded across the 10 precincts on both Friday and Saturday nights.

Chart 6.1 shows that, over half (52%, equivalent to 762) were non serious incidents such as making noise and horsing around. The remaining assessment focuses on serious and less serious antisocial behaviour incidents.

Two fifths of the incidents recorded were less serious (38%, 558 incidents). One in ten (10%, 145 incidents)

- When the number of pedestrians in the precincts was taken into account, Surry Hills, followed by Kings Cross, had the highest number of ASB incidents per 1,000 people
- Pyrmont and Redfern had the highest rates of ASB per 1,000 people on Friday. Kings Cross observed the highest rates per 1,000 people on a Saturday
- There does not appear to be a direct relationship between the concentration of licensed premises and the incidence of ASB
- CBD South had the highest level of footway congestion between 6-11pm, while Oxford Street had the highest level of congestion between 11pm-1am
- There is a relationship between congestion and antisocial behaviour throughout the evening and night, with the exception of a distinctive peak in ASB at 3am, despite gradually decreasing congestion

## Introduction

An observation survey was conducted across all precincts to record three key aspects of street activity:

- Instances of antisocial behaviour, classified as:
  - Serious ASB – physical and verbal fights and arguments, shouting and verbal abuse
  - Less serious ASB – drunken behaviour including staggering, falling, loud music, urination, vomiting, street drinking and vandalism
  - Non-serious – this is identified as incidents of singing or playing
- Congregation – defined as standing groups of people
- Congestion – the level of space available on the footpath

Observers were provided with detailed definitions and practical examples of behaviour that did and did not qualify for each of the behaviour types. Pilot surveys were also conducted and checked for reliability to ensure surveyors were identifying the correct type of incidents.

The following section provides an overview of the data collected during the observation survey.

were identified as serious incidents such as physical and verbal fights.

Chart 6.1 – Type of incidents

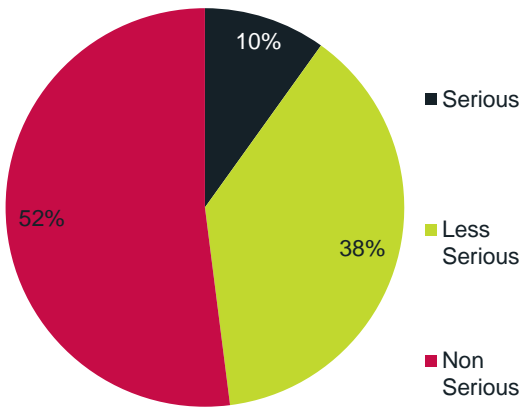


Chart 6.2 presents the type of ASB incidents recorded in each of the precincts in 2015. This shows that:

- Most ASB incidents were observed in CBD South (189) and Kings Cross (185)
- Very few incidents were observed in CBD North (18)
- Kings Cross had the highest proportion of serious incidents (30%) followed by CBD South (27%)
- CBD Central (97%), followed by Glebe (95%) had the highest proportion of less serious incidents.

Chart 6.2 – Serious vs. Less Serious ASB by precinct

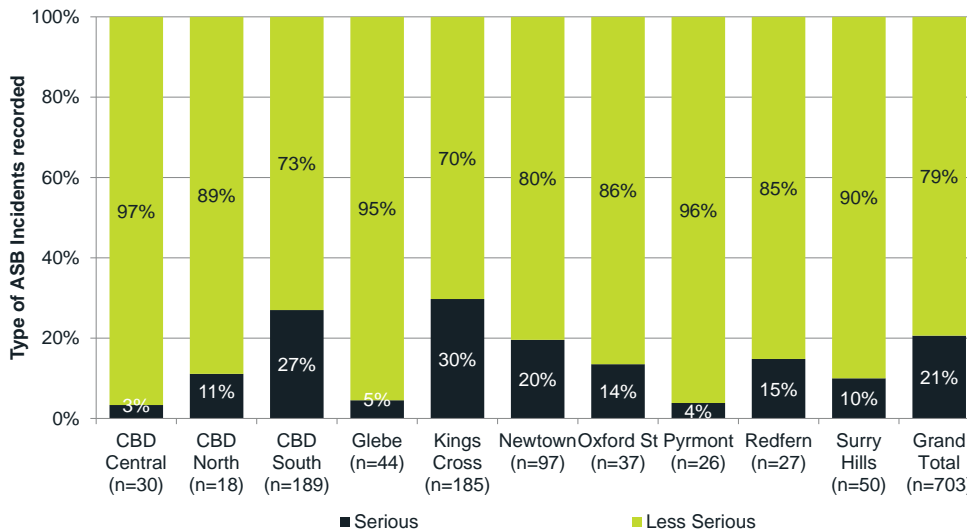
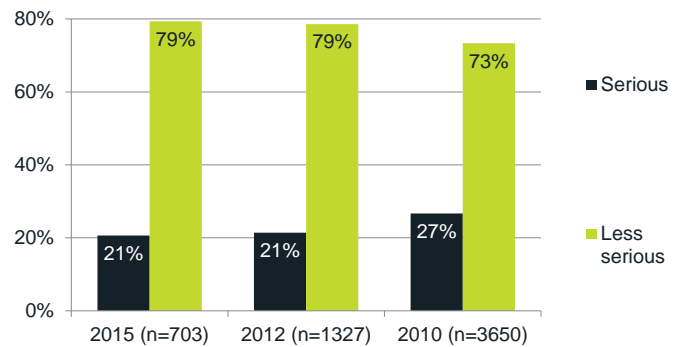


Chart 6.3 compares the type of ASB incidents recorded in 2015, 2012 and 2010.

It should be noted that 2015 data is based on observations across 10 precincts, 2012 across 8, and 2010 at different stages across 5 precincts. Despite the increase in the number of precincts observed, the number of ASB incidents has decreased since 2010. In 2010, 3,650 serious or less serious incidents were reported, compared to 1,327 in 2012 and 703 in 2015. This is a 80% decrease in observed ASB since 2010.

Chart 6.3 also indicates that there has been little difference in the type of ASB incidents recorded across the precincts. The proportion of serious incidents reported has remained the same since 2012, and decreased since 2010 (27%).

Chart 6.3 – Type of ASB incidents 2015, 2012, 2010



Timing of ASB

Chart 6.4 presents the distribution of serious and less serious ASB incidents for all precincts over Friday and Saturday night. This shows:

- Fewer than 10% of incidents occurred in the early evening (before 9pm)

- On Friday, serious incidents peaked at 10pm (23% of incidents recorded)
- On Saturday, serious incidents peaked at 3am (44% of incidents recorded). This coincides with the last drinks in all licensed venues
- Less serious incidents were more evident between 11pm-12am on Friday, and at 3am on Saturday.

Chart 6.4 – Timing of ASB incidents

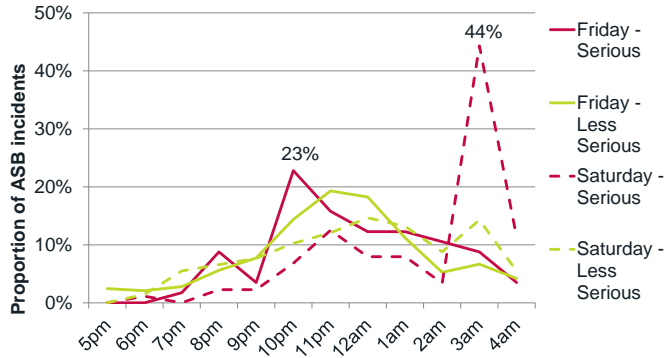


Chart 6.5 and 6.6 show the number of serious and less serious incidents observed in the CBD Entertainment Precincts and city village main Streets respectively<sup>20</sup>. These charts show:

- CBD South had the highest number of incidents in the evening and night time, peaking at 11pm – this is one of the largest and busiest precincts in the City
- Kings Cross had the highest number of incidents in the late night, peaking at 3am – at this time Kings Cross is one of the busiest precincts in the City
- The Village Main Streets generally observed peaks between 11pm-12am, with Surry Hills observing the greatest peak, at 11pm, of 16 incidents.

Chart 6.5 – Timing of ASB incidents Sydney CBD Entertainment Precincts

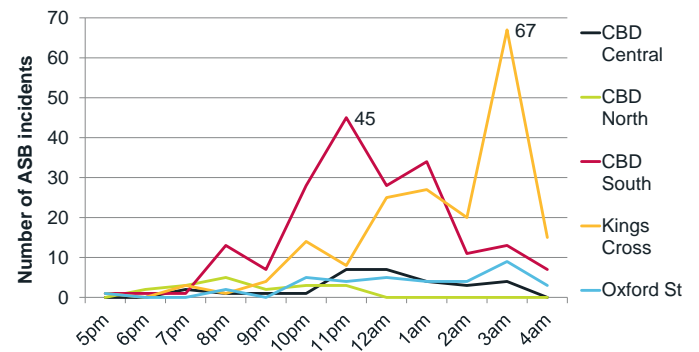
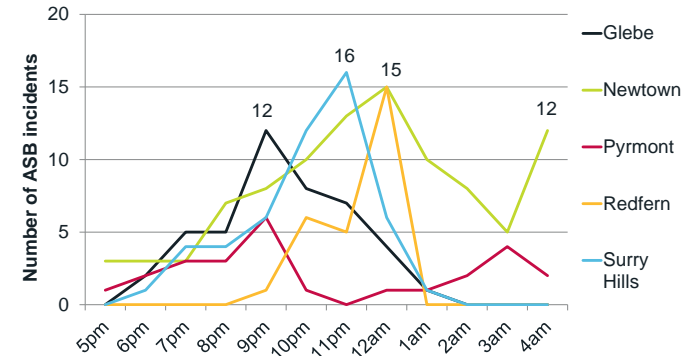


Chart 6.6 – Timing of ASB incidents City Village Main Streets



Location of ASB

Figures 6.1 and 6.2 present the location of ASB incidents on Friday and Saturday nights. These figures show:

- On Friday:
  - A concentration of incidents in the north of the CBD South precinct (close to Park St and George St)
  - A concentration of incidents near Pyrmont Bridge
  - A concentration of incidents near Redfern Station
- On Saturday:
  - A high concentration of incidents in Kings Cross
  - Smaller concentrations across most precincts compared to Friday

<sup>20</sup>Surry Hills, Redfern and Glebe were only counted until 1am as pedestrian numbers are very low after this time

Figure 6.1 – Location of ASB incidents Friday

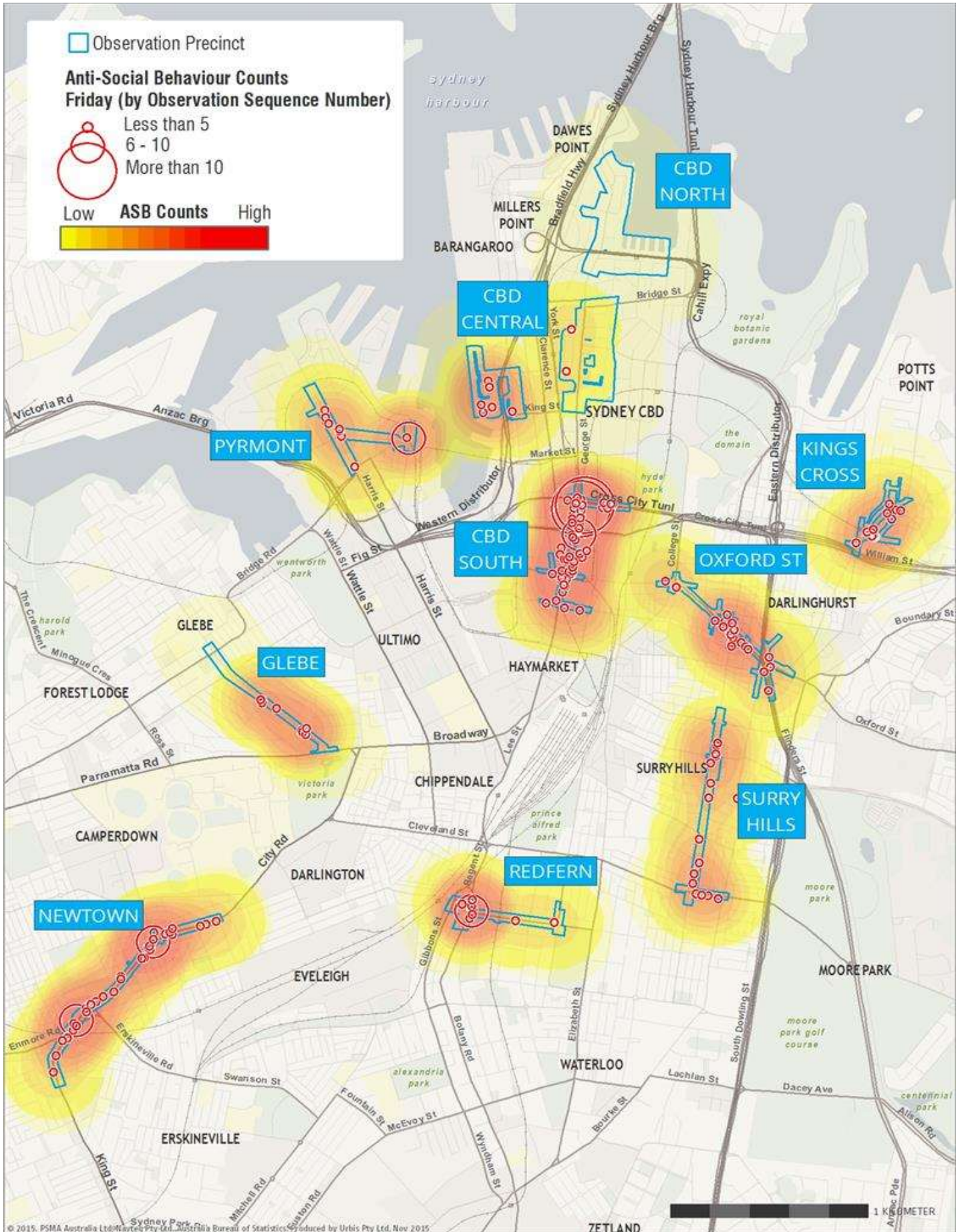
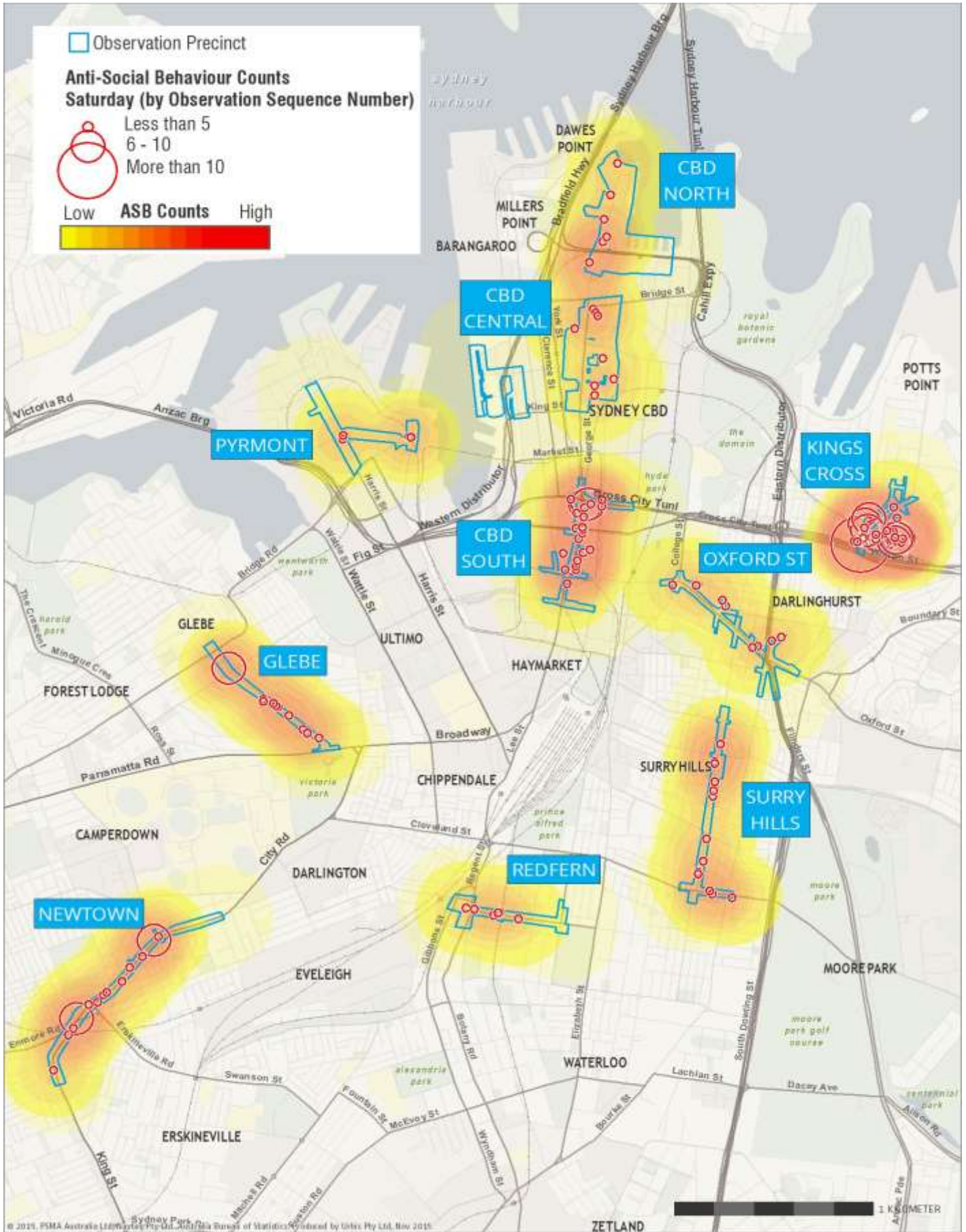


Figure 6.2 – Location of ASB incidents Saturday



**Figure 6.2 – Location of ASB incidents Saturday**

**Location of ASB and distribution of licensed premises**

Figures B1 and B2 in Appendix B present the location of observed ASB incidents on Friday and Saturday nights as well as the location of licensed premises in the city. These figures suggest that there is no apparent relationship between the concentration of licensed premises and the incidence of ASB. Factors that may influence these results include the type of licensed premises, their opening hours, and precinct-specific factors (e.g. precinct culture). It has not been possible to assess these factors further based on available data.

**Density of ASB incidents – per 50m section**

Each precinct is a different shape and size. To control for the difference in size, the precincts have been divided into 50m segments, and the number of ASB incidents per 50m segment have been identified.

Table 6.1 identifies the number of ASB incidents recorded for each 50m segment on Friday and Saturday night. When the size of each precinct is taken into account:

- CBD South had the highest rates of recorded ASB overall (6.9 incidents per 50m section), followed by Kings Cross (6.0)
- Newtown (2.4), Glebe (1.9), Surry Hills (1.3), Redfern (1.0) all observed at least one incident for every 50m stretch
- CBD South observed the highest number of incidents on Friday (4.8) followed by Newtown (1.6 incidents)
- Kings Cross observed the highest number of incidents on Saturday night (5.5) followed by CBD South (2.1).

**Table 6.1 – Number of ASB incidents per 50m section**

Precinct	Friday	Saturday	Total
CBD Central	0.2	0.1	0.3
CBD North	0.0	0.5	0.5
CBD South	4.8	2.1	6.9
Glebe	0.9	1.0	1.9
Kings Cross	0.5	5.5	6.0
Newtown	1.6	0.8	2.4
Oxford St	0.4	0.1	0.5
Pymont	0.7	0.3	0.9
Redfern	0.8	0.2	1.0
Surry Hills	0.6	0.7	1.3

**Density of ASB incidents – per 1000 people**

While the above analysis considers the size of the precinct, it does not consider the number of pedestrians in each precinct.

Pedestrian congregation and congestion can have a demonstrated impact on the potential for ASB (see below for further analysis), especially in areas with limited capacity or footpath space. As indicated in Section 5, the number of pedestrians in each precinct varies greatly over the night, and between each day.

In order to consider the level of pedestrian activity on ASB, Table 6.2 compares the number of ASB incidents reported on Friday and Saturday night against the average number of pedestrians counted in each precinct, and presents this as the number of ASB incidents recorded per 1,000 pedestrians. When the level of pedestrian activity is taken into account:

- Surry Hills recorded the highest rate of ASB per 1,000 people (37 incidents per 1,000) followed by Kings Cross (36.3) and Redfern (29.6)
- Glebe (7.8), CBD North (8.3) and CBD Central (4.9) observed the lowest number of incidents per 1,000 people
- Pymont (21.3) and Redfern (21.5) both observed the highest number of incidents per 1,000 people on Friday night
- Kings Cross (32.4) observed the highest number of incidents per 1,000 people on a Saturday night.

**Table 6.2 – Number of ASB incidents per 1000 people**

Precinct	Friday	Saturday	Total
CBD Central	3.0	1.8	4.9
CBD North	0.0	7.1	8.3
CBD South	6.9	4.0	11.2
Glebe	3.9	3.8	7.8
Kings Cross	2.8	32.4	36.3
Newtown	12.0	5.0	16.6
Oxford St	8.9	2.7	11.4
Pymont	21.3	6.4	26.2
Redfern	21.5	7.2	29.6
Surry Hills	16.4	21.1	37.0

**Density of ASB incidents – comparison between 2012 and 2015**

Table 6.3 presents the change in the number of ASB incidents observed for every 50m section between 2015 and 2012<sup>21</sup>. This indicates:

<sup>21</sup>Excluding CBD Central and CBD North which were not recorded in 2012



- Overall four precincts observed an increase, and four observed a decrease, in the number of ASB incidents in each 50m section
- CBD South observed the largest increase in ASB per 50m since 2012 (+1.2 incidents), with the largest increase observed on Friday (+3.4 incidents)
- Kings Cross observed the largest decrease of incidents per 50m (-14.4), with the largest decrease observed on Friday (-9.3 incidents)

Table 6.3 – Number of ASB incidents per 50m section – 2012 vs 2015

Precinct	Friday 2012	Friday 2015	Change Friday	Saturday 2012	Saturday 2015	Change Saturday	Total Friday & Saturday 2012	Total Friday & Saturday 2015	Change total
CBD South	1.4	4.8	+3.4	4.3	2.1	-2.2	5.7	6.9	+1.2
Glebe	1.0	0.9	-0.1	0.2	1.0	+0.8	1.2	1.9	+0.7
Kings Cross	9.8	0.5	-9.3	10.6	5.5	-5.1	20.4	6.0	-14.4
Newtown	9.4	1.6	-7.8	3.8	0.8	-3	13.2	2.4	-10.8
Oxford St	4.8	0.4	-4.4	2.3	0.1	-2.2	7.1	0.5	-6.6
Pymont	0.4	0.7	+0.3	0.1	0.3	+0.2	0.5	0.9	+0.4
Redfern	0.4	0.8	+0.4	0.0	0.2	+0.2	0.4	1.0	+0.6
Surry Hills	2.5	0.6	-1.9	1.1	0.7	-0.4	3.7	1.3	-2.4

Table 6.4 – Number of ASB incidents per 1000 people – 2012 vs 2015

Precinct	Friday 2012	Friday 2015	Change Friday	Saturday 2012	Saturday 2015	Change Saturday	Total Friday & Saturday 2012	Total Friday & Saturday 2015	Change total
CBD South	2.1	6.9	+4.8	8.3	4.0	-4.3	9.5	11.2	+1.7
Glebe	1.8	3.9	+2.1	0.3	3.8	+3.5	1.9	7.8	+5.9
Kings Cross	70.2	2.8	-67.4	71.1	32.4	-38.7	141.5	36.3	-105.2
Newtown	23.4	12.0	-11.4	8.0	5.0	-3	30.2	16.6	-13.6
Oxford St	42.5	8.9	-33.6	19.2	2.7	-16.5	61.1	11.4	-49.7
Pymont	3.4	21.3	+17.9	0.9	6.4	+5.5	4.0	26.2	+22.2
Redfern	3.1	21.5	+18.4	0.0	7.2	+7.2	3.3	29.6	+26.3
Surry Hills	24.7	16.4	-8.3	13.0	21.1	+8.1	38.5	37.0	-1.5

Table 6.4 presents the change in ASB density per 1,000 people between 2015 and 2012. This indicates:

- Redfern observed the largest increase in ASB incidents per 1,000 people, increasing from 3.3 incidents in 2012 to 29.6 incidents in 2015 (+26.3)
- Kings Cross observed the largest decrease in ASB per 1,000 people, decreasing from 61 incidents in 2012 to 11 incidents per 1,000 people in 2015 (-105.2).

**Congestion and congregation**

Congregation refers to the number of people in standing groups of three or more, e.g. waiting for a bus or taxi, socialising, or waiting in a venue queue. Congestion refers to the amount of available space on the footpath, as a result of:

- The number of pedestrians and groups
- Footpath widths
- Obstacles (e.g. furniture, bins, seating, trees).

Chart 6.7 presents the level of footway congestion for all precincts during the survey period. This shows that:

- CBD South had the highest level of footway congestion between 6-10pm, with over 1,600 people congregating on the street, and experienced a second peak (of over 1,000 people) at 2am
- Oxford Street had the highest level of congestion at 12am (over 1,400 people)
- CBD Central had two distinct peaks in congestion, once at 6pm and again at 10pm-11pm
- Kings Cross had a stable level of congestion between 10pm-1am (more than 600 people)
- Glebe experienced a peak in congestion at 6pm
- Redfern experienced a peak in congestion at 8pm
- Newtown experienced a peak in congestion at 9pm
- Surry Hills experienced a peak in congestion at 10pm

- Pyrmont experienced a peak in congestion at 11pm.

Congregation and congestion may lead to an increase in the risk of antisocial behaviour incidents by bringing groups of intoxicated people in close proximity to each other. Chart 6.8 presents an analysis of the average number of people on the footway and the average number of antisocial behaviour incidents recorded for all precincts.

Congestion increased rapidly in the early evening (5-6pm), in correlation with a first peak in average ASB. Both congestion and average ASB decreased between 6-7pm, and peak again at 8pm. This pattern was observed again with a decrease at 9pm in both congestion and average ASB, followed by a peak at 10pm in congestion and a delayed peak in average ASB at 12am. Congestion and average ASB decreased rapidly at 12am. While congestion continued to decrease until 4am, average ASB peaked distinctively at 3am.

Chart 6.7 – Level of congestion

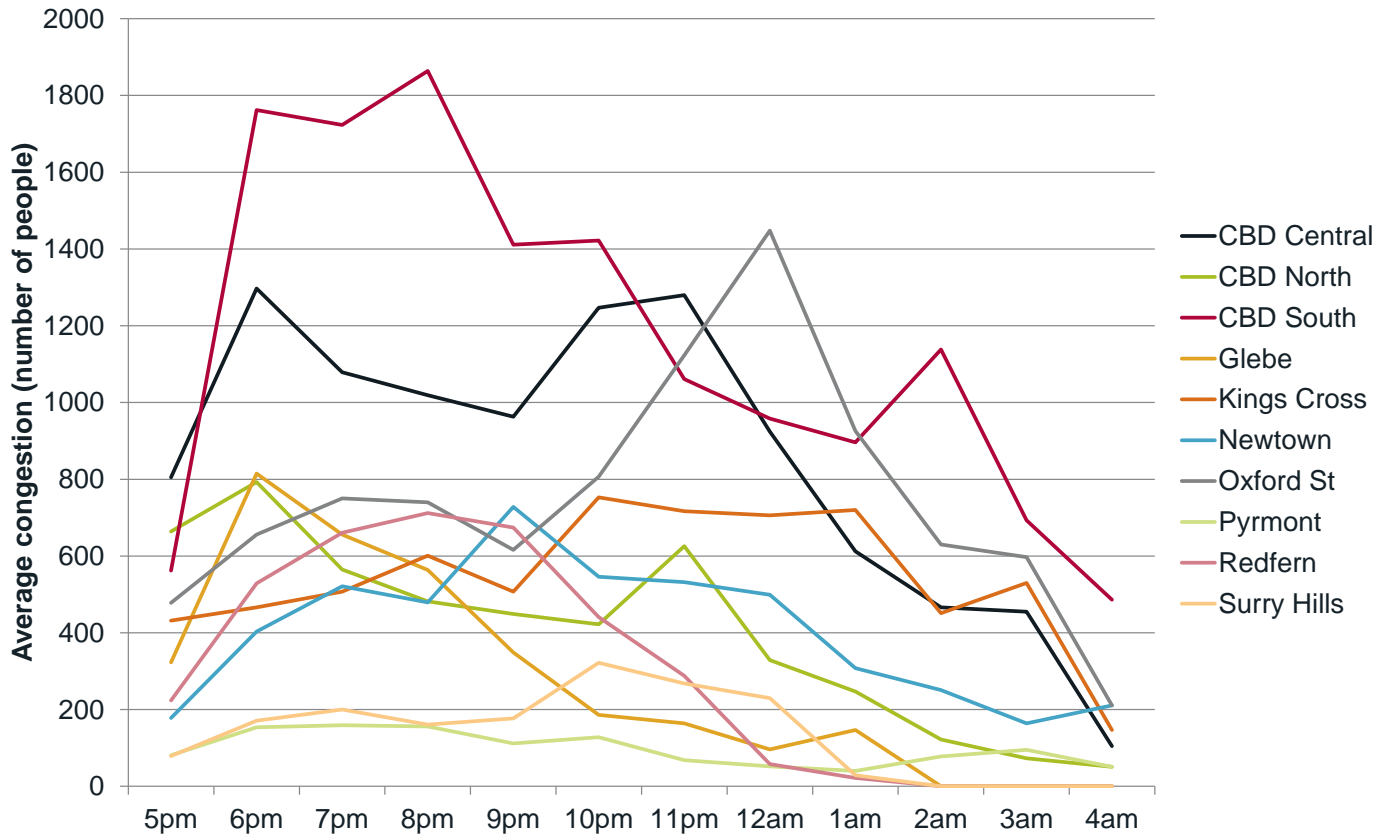
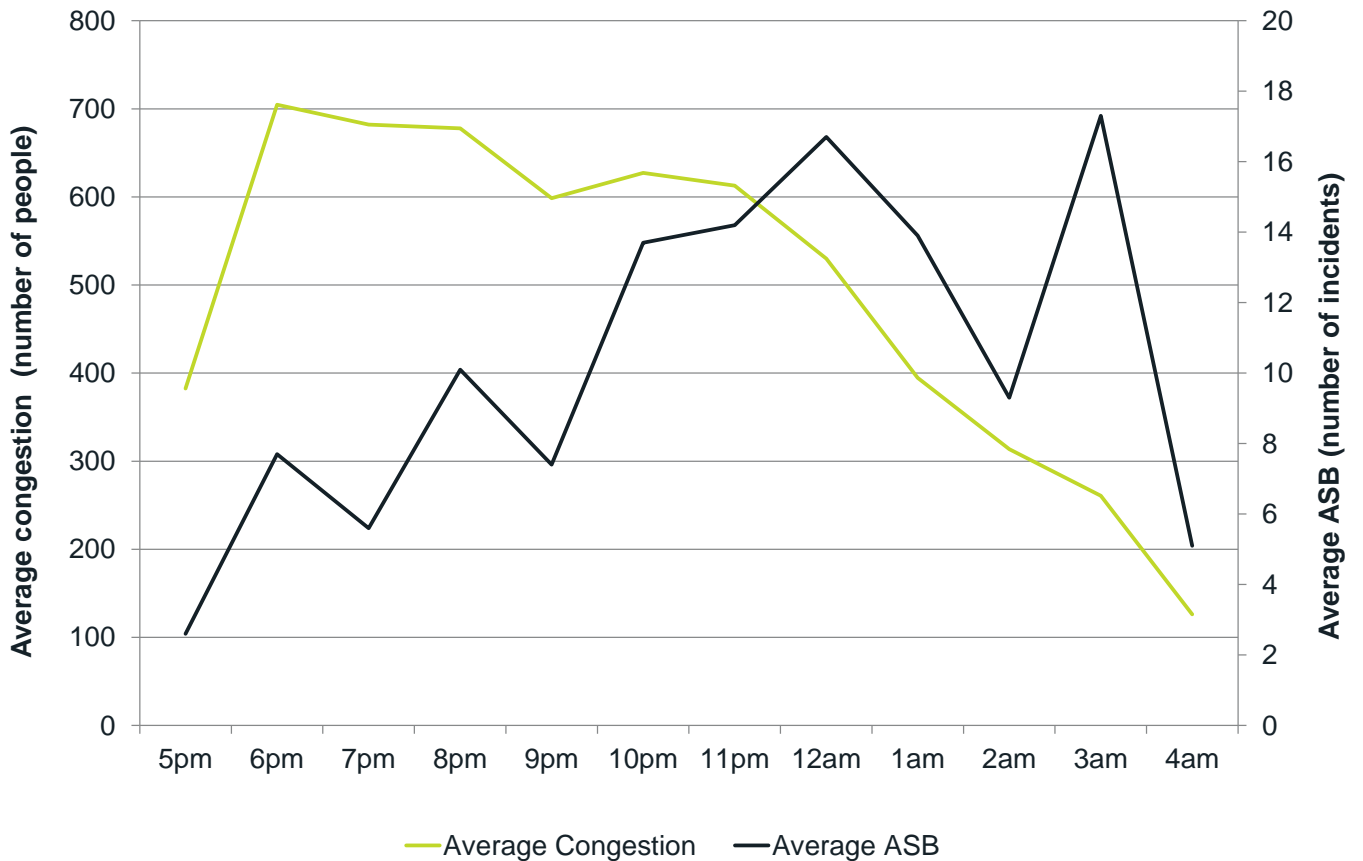


Chart 6.8 – Antisocial behaviour incidents and congestion



# 7. Business activity

## Summary

- Over 1,000 businesses were open across all precincts at 6pm, more than 570 were open at 11pm, and more than 200 at 4am
- Overall, businesses were most often cafes or restaurants (31%), followed by pubs, taverns or bars (20%) and retail shops (16%)
- Close to half of all businesses open during the night in the city villages were cafes and restaurants (48%), compared to less than one quarter in the Entertainment precincts (23%). Conversely, close to a quarter (23%) of open businesses in the Entertainment precincts were pubs, taverns and bars compared to less than one sixth (15%) in the villages
- On average, in Oxford Street the highest proportion of open business were retail shops (24)
- Compared to 2012, there was no change in the proportion of cafes or restaurants, and pubs, taverns, and bars open through the night (31% and 18% of all businesses respectively in 2012 and 2015)
- There has been a slight (+3%) increase in the proportion of retail shops open at night
- There were approximately 2,057 premises with a liquor licence across the ten precincts, up by 13% since 2012
- Of these the majority were on-premises licences (71%), and one in ten were hotel licences (13%)
- CBD Central had the largest number of licences followed by Kings Cross and Oxford Street
- One third of licenced venues are permitted to operate until 12am (36%), with a further quarter closing at 10pm (23%) and one in ten closing at 5am (10%)

- CBD Central (15%) and Kings Cross (14%) had the highest proportion of venues licensed to operate until 5am

## Introduction

The City of Sydney OPEN Sydney Strategy by 2030 has a target that states 40% of businesses open after 6pm in the city will be shops. This target was developed to support the aim of developing a diverse night time economy that is not dominated by licensed premises.

A business activity survey of each precinct was undertaken as part of LNMAR. This survey aimed to identify the number and type of businesses which were open in the city over the night time.

Businesses were classified as follows:

- Cafes and restaurants
- Pub, taverns or bars
- Takeaway food
- Supermarkets or newsagents
- Retail
- Other retail
- Accommodation.

## Business activity in the NTE

The number and types of businesses open varied considerably through the night. Chart 7.1 presents the average number and type of businesses open on Friday and Saturday. Chart 7.2 presents the proportion of all businesses open each hour by type. This indicates:

- At 6pm there were on average 1,090 businesses open across all precincts
- Of these, one third (32%) were restaurants and cafes, one fifth (21%) were retail premises, and one sixth (15%) were pubs, taverns, or bars
- Early evening (between 6-9pm) was the busiest period with on average 850 businesses open at 9pm
- By 10pm there was a -15% decrease in the number of businesses open, a -20% decrease between 10-11pm, and a -25% decrease between 11pm-12am
- The early evening was characterised by a high proportion of cafes, restaurants and shops (52% of open businesses at 9pm), with licensed premises representing only one fifth of open business (19%)
- By midnight the profile changed, to a high proportion of pubs, taverns and bars (30%)
- Between 1-2am, the number of open premises decreased by -17%, and the proportion of pubs, taverns, and bars decreased to 26% of all open businesses
- By 4am there were on average 208 businesses open – 14% were pubs, 19% were shops, and 17% were cafes or restaurants.

Chart 7.1 – Average number of businesses open

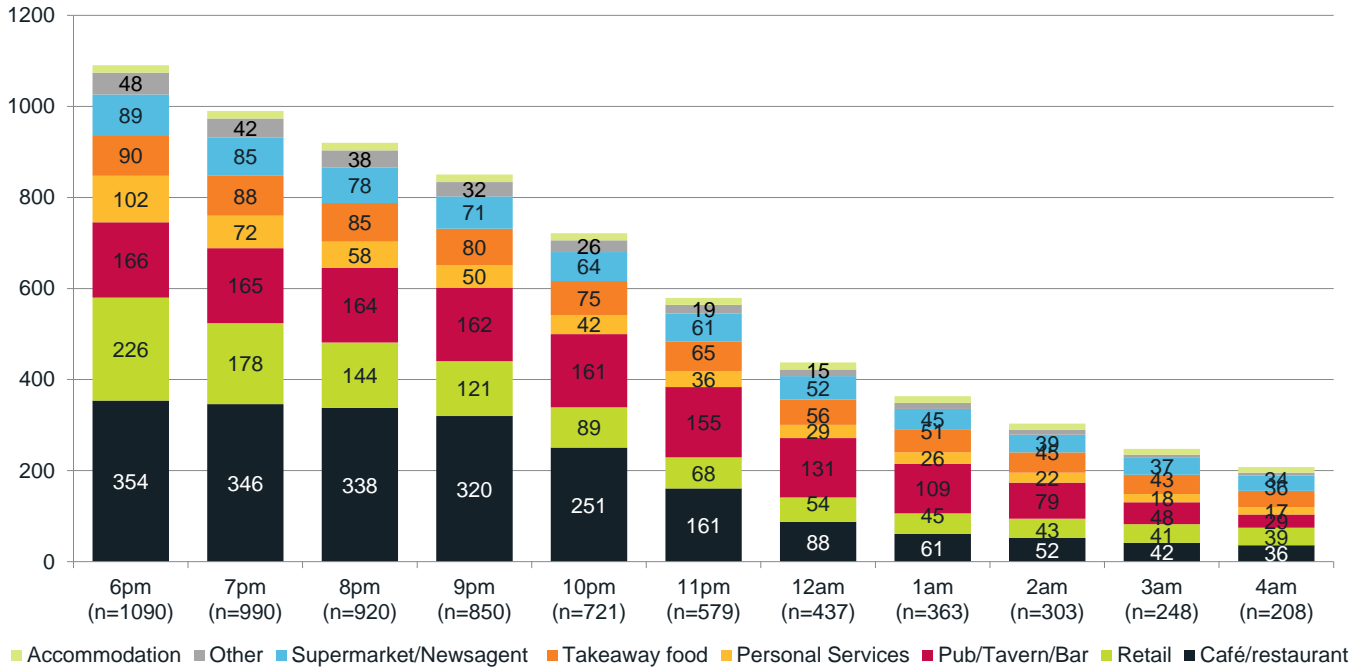
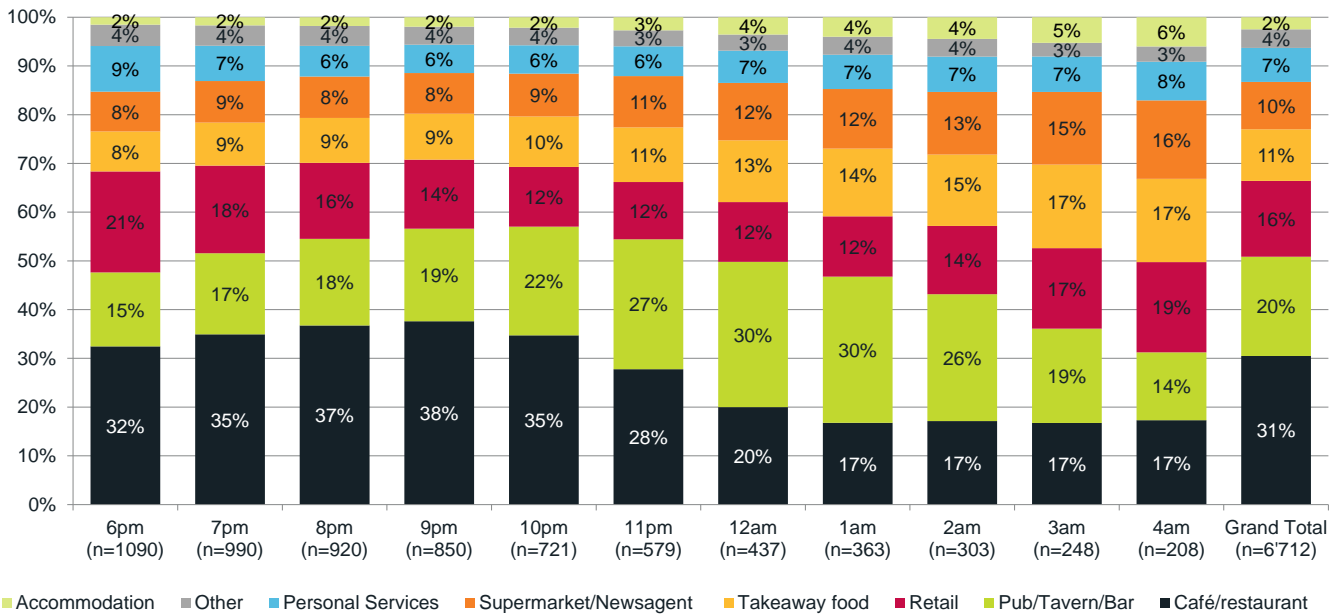


Chart 7.2 – Proportion of businesses open



**Chart 7.3 – Proportion of businesses open in CBD Entertainment Precincts vs Village Main Streets<sup>22</sup>**

**Chart 7.4 – Proportion of businesses open by precinct**

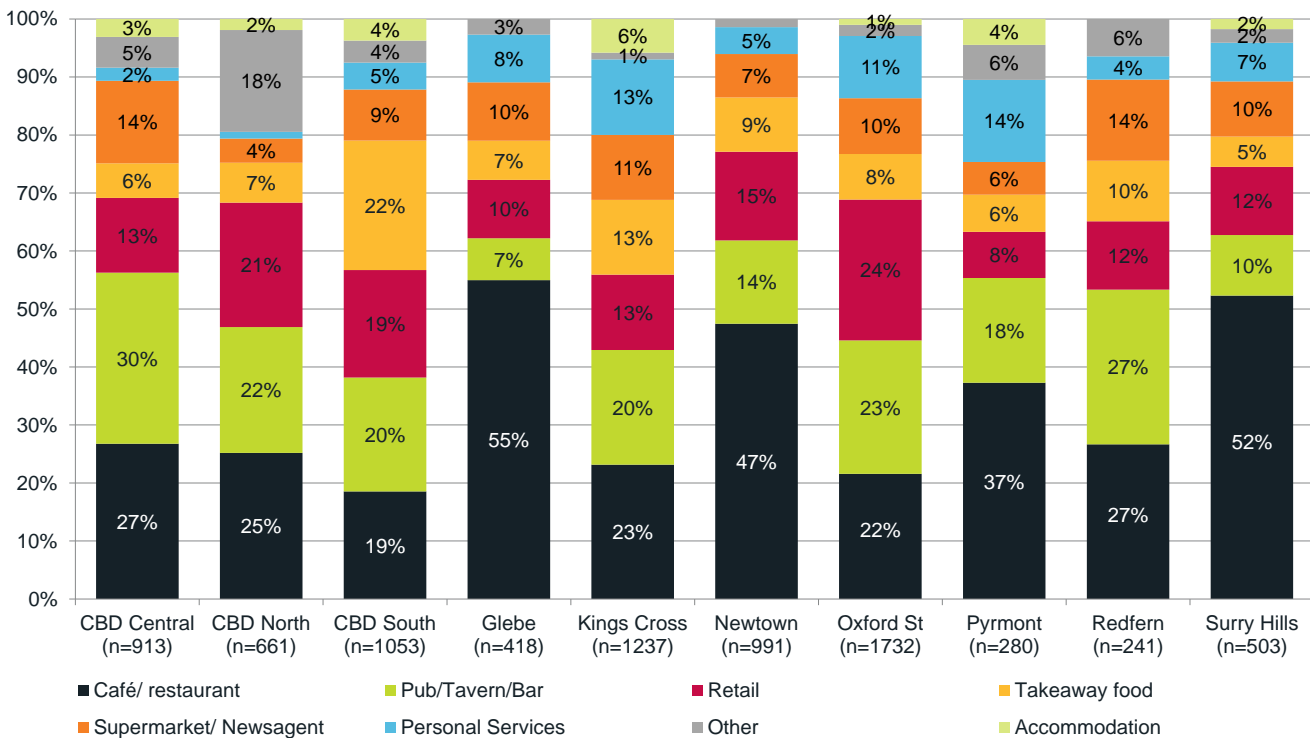
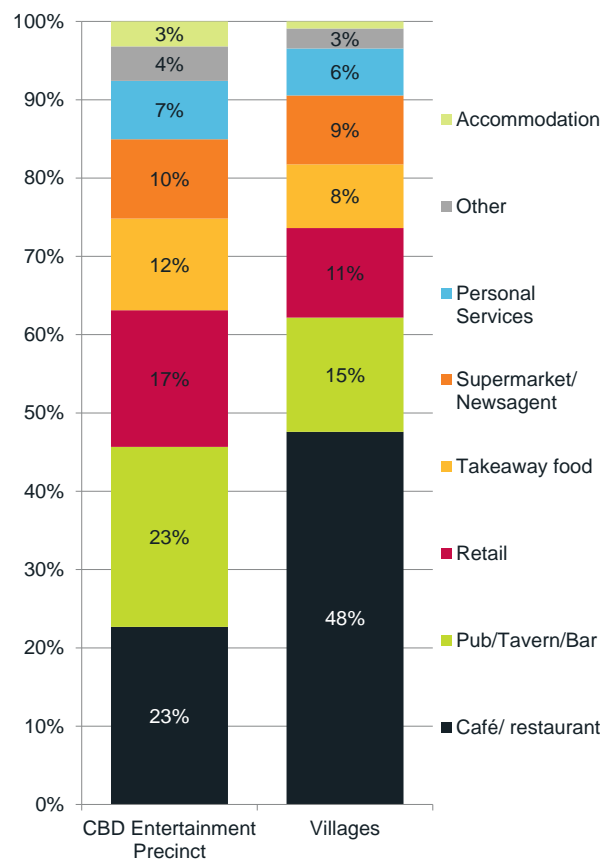


Chart 7.3 indicates that the profile of businesses varied greatly between the different areas of the city. It outlines the businesses open across the night time for the Sydney CBD Entertainment Precinct (CBD, Kings Cross and Oxford Street), compared to the City Village Main Streets (Pyrmont, Newtown, Surry Hills, Redfern and Glebe). This shows:

- Close to half of all businesses open during the night in the suburbs were cafes and restaurants (48%), compared to less than one quarter in the Entertainment precincts (23%)
- Less than one sixth (15%) of open businesses in the suburbs were pubs, taverns and bars, compared to close to a quarter (23%) in the CBD
- The CBD Entertainment Precincts had a greater diversity of business activity across the night compared to the suburbs.

Chart 7.4 presents the proportion of businesses open in each precinct for the full duration of the survey<sup>23</sup>. This shows:

- Glebe (55%) and Surry Hills (52%) had the highest proportion of cafes and restaurants open during the night
- CBD Central (30%), followed by Redfern (27%) had the highest proportion of pubs, taverns and bars



<sup>22</sup> "N" values represent the average number of businesses on both Friday and Saturday

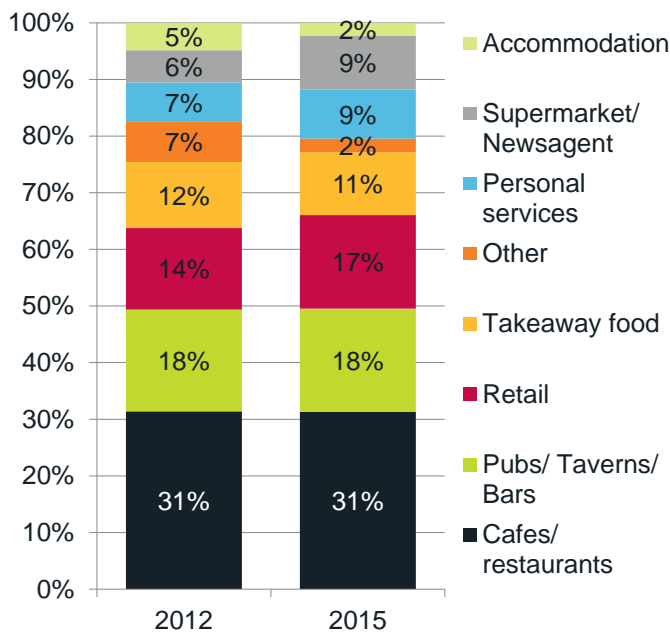
<sup>23</sup> Surry Hills, Redfern and Glebe were only counted until 1am as pedestrian numbers are very low after this time

- Close to one quarter of open businesses in Oxford Street were retail (24%).

Chart 7.5 compares the types of businesses open throughout the night in 2012, compared with those in 2015. To provide an accurate comparison, the CBD Central and CBD North precincts have been excluded from the 2015 figures. Since 2012:

- There has been little change in the types of businesses open in the city at night
- There was no change in the proportion of cafes or restaurants, and pubs, taverns, and bars open through the night (31% and 18% of all businesses respectively for both 2012 and 2015)
- There was an increase in the proportion of supermarket and newsagents (+4%), and retail shops (+3%) open throughout the night.

**Chart 7.5 – Proportion of businesses open 2012 vs 2015**



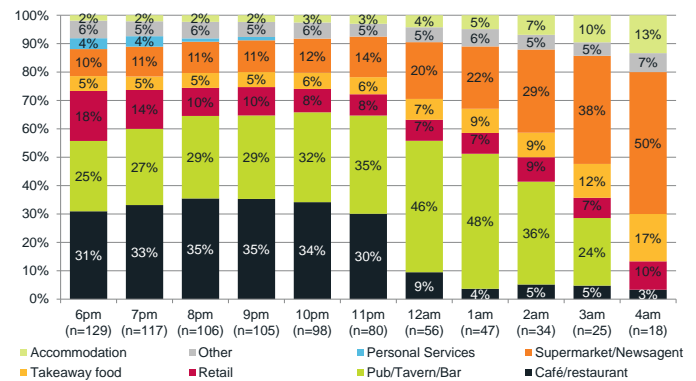
**Precinct profiles**

The following sections present analysis on the average number and type of businesses open on both Friday and Saturday night for each precinct.

**CBD Central**

In the early evening (6-9pm), the CBD Central district had on average over 100 businesses open, a third of which were cafes and restaurants (31-35%). By 1am, less than 50 businesses were open, and close to half (48%) were pubs, taverns and bars. By 4am less than 20 businesses were open, and 50% were supermarkets or newsagents.

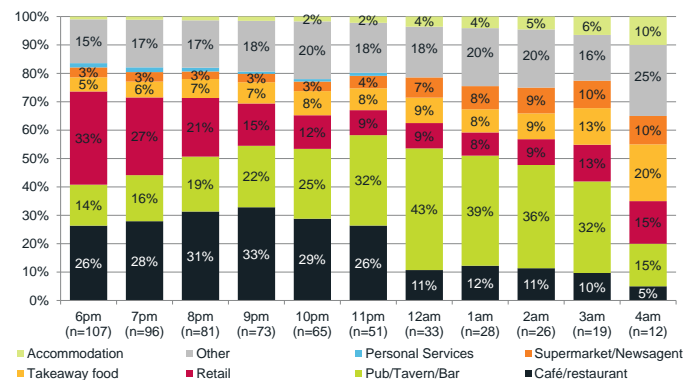
**Chart 7.6 – Average proportion of businesses open in CBD Central**



**CBD North**

In the early evening, the CBD North had on average between 70-100 businesses open, with a large proportion being retail (33% at 9pm). Later in the night the number of open businesses decreased to around 20-30, almost half of which were pubs, taverns and bars (43% at 12am). By 4am on average 12 businesses were open, and one quarter (25%) were 'other' business types.

**Chart 7.7 – Average proportion of businesses open in CBD North**



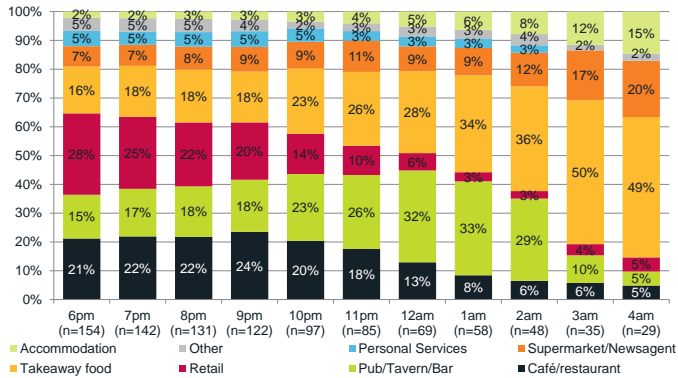
**CBD South**

CBD South was one of the busiest precincts in the early evening. On average, over 120 businesses were open (154 at 9pm) including retail (28%). This decreased to less than 10% by 12am. Later in the night pubs, taverns



and bars (33%) and supermarkets and newsagents (34%) account for one third of businesses. By 4am close to 30 businesses remain open, with around half (49%) being supermarkets and newsagents.

**Chart 7.8 – Average proportion of businesses open in CBD South**

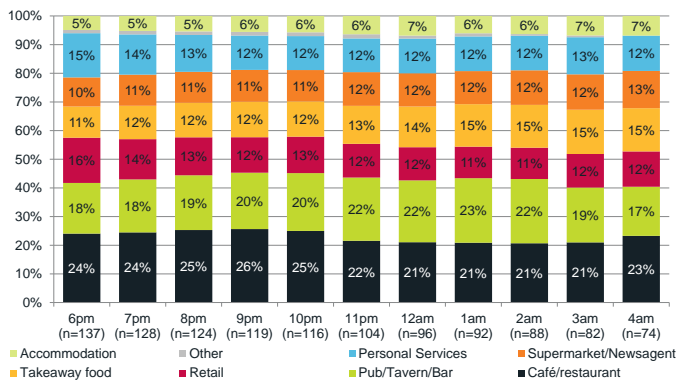


**Kings Cross**

Kings Cross is the fourth busiest business precinct in the early evening (after Oxford Street, Newtown, and CBD South). On average, fewer than 140 businesses were open at 6pm. The precinct was also the second busiest (after Oxford Street) during the late night (3-4am), with on average over 70 businesses open.

There was a fairly constant profile of businesses across the evening, with around one quarter (21-25%) being cafes and restaurants, one fifth (17-23%) being pubs, taverns and bars, and one tenth (10-15%) being either supermarkets, takeaway food, or personal services.

**Chart 7.9 – Average proportion of businesses open in Kings Cross**

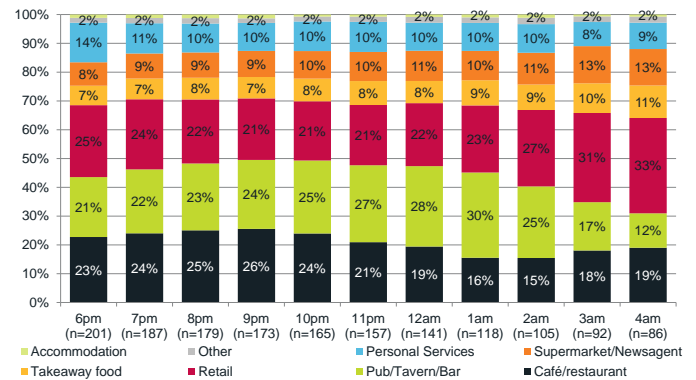


**Oxford Street**

Oxford Street was the busiest business precinct in the City across the night. In the early evening, over 200 businesses are open at 6pm. In the late night, over 80 businesses are open at 4am.

There was a fairly constant business profile through the night, including an even split of cafes and restaurants (23%), pubs, taverns and bars (21%) and retail (25%) businesses at 6pm. By 4am, one third of open businesses were classified as retail (33%).

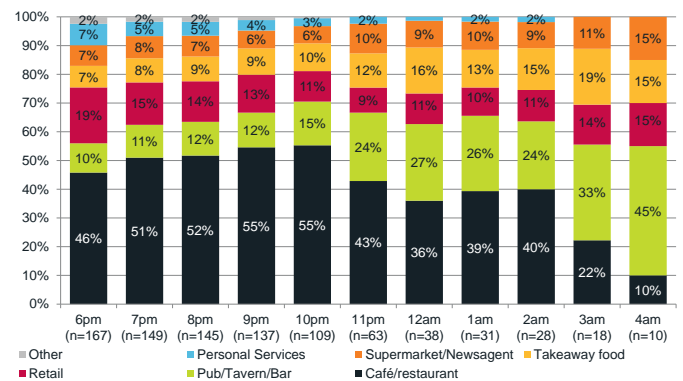
**Chart 7.10 – Average proportion of businesses open in Oxford Street**



**Newtown**

Newtown was the second busiest business precinct in the early evening, with over 160 businesses open at 6pm. The early evening was dominated by cafes and restaurants (46-55%). By 12am, the number of open businesses decreased to less than 40, with one third (36%) being cafes and restaurants, and one quarter (27%) pubs, taverns and bars. By 4am, close to half of all open businesses were pubs, taverns and bars (45%).

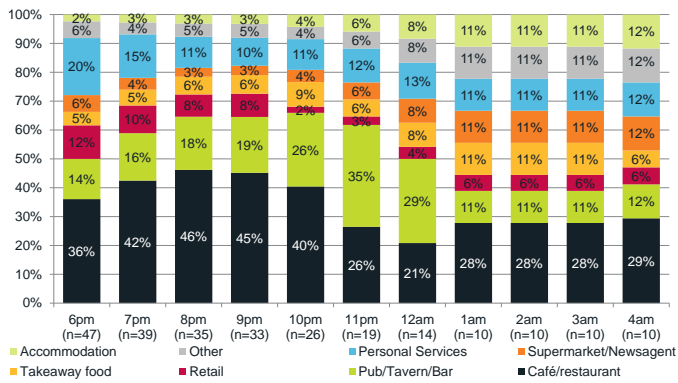
**Chart 7.11 – Average proportion of businesses open in Newtown**



**Pymont**

In the early evening Pymont has on average over 40 businesses open, with a high proportion being cafes and restaurants (36-46%). By 11pm, there are on average less than 20 businesses open, with over one third (35%) being pubs, taverns or bars.

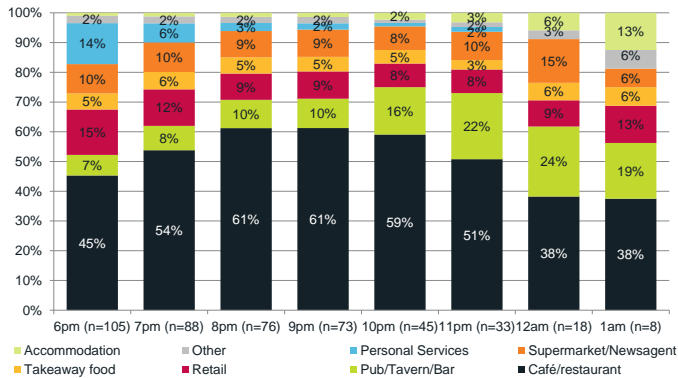
**Chart 7.12 – Average proportion of businesses open in Pyrmont**



**Surry Hills**

Surry Hills has on average over 100 businesses open at 6pm, falling to less than 50 by 10pm, and less than 10 by 1am. The precinct is characterised by a high proportion of cafes and restaurants in the early evening (45-61%). By 11pm-12am pubs, taverns and bars make up close to one quarter (22-24%) of businesses open.

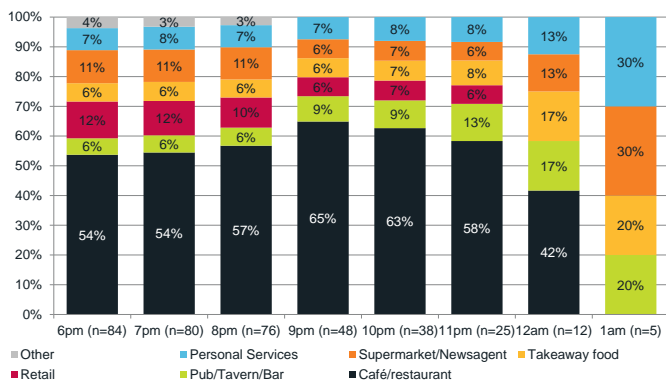
**Chart 7.13 – Average proportion of businesses open in Surry Hills**



**Glebe**

On average there are fewer than 90 businesses open in Glebe during the night, mainly cafes and restaurants (over 50% of businesses open between 9-11pm). By 1am personal service (30%) and supermarkets (30%) are the main business offerings.

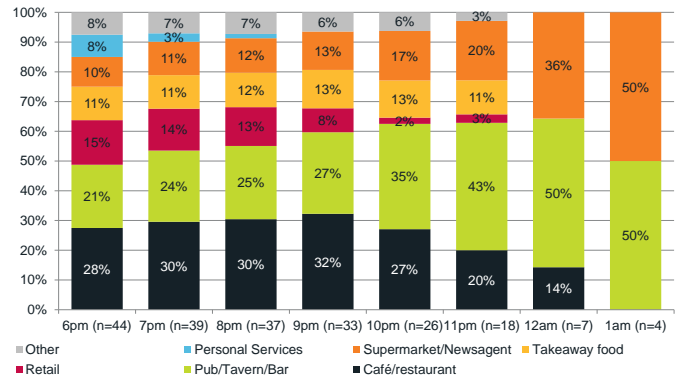
**Chart 7.14 – Average proportion of businesses open in Glebe**



**Redfern**

Redfern is the quietest business precinct in the city at night, with on average less than 45 businesses open at 6pm, falling to less than 5 by 1am. Most business open in the early evening are either cafes and restaurants (28-32%) or pubs, taverns and bars (27%-21%).

**Chart 7.15 – Average proportion of businesses open in Redfern**



### Licensed premises data

#### Licensed premises types

This section presents an overview of licensed premises data obtained from the Office for Liquor, Gaming and Racing (OLGR) for the various precincts.

In total 2,057 active liquor licences were identified within the LNMAR precincts in 2015. Table 7.1 below presents the types of licences identified, and compares this to 2012 licenced premises data. This shows:

- The number of liquor licences has increased by 231 licences (+13%) since 2012
- The majority of licences were on-premises licences (71%), followed by hotel licences (13%) and packages liquor licences (7%)
- There has been a large increase (169, +13%) in the number of on-premises liquor licences in the precincts since 2012

**Table 7.1 – Licenced premises in 2015 and 2012**

Licence type	2012		2015		Change No.
	No.	%	No.	%	
Club licence	29	2%	29	1%	-
Hotel licence	266	15%	274	13%	+8
Limited licence	5	0%	10	0%	+5
On-premises licence	1,291	71%	1,460	71%	+169
Packaged liquor licence	125	7%	146	7%	+21
Producer wholesaler licence	110	6%	127	6%	+17
Small bar licence	-	-	11	1%	+11
<b>TOTAL</b>	<b>1,826</b>	<b>100%</b>	<b>2057</b>	<b>100%</b>	<b>+231</b>

Chart 7.16, overleaf, presents the number and type of licenced premises in each of the precincts. This indicates:

- CBD Central has the largest number of licenced premises (n=306) followed by Kings Cross and Oxford Street (both 247)
- Pyrmont has the fewest licenced premises (n=97)
- CBD North (4%) followed by Redfern (3%) had the highest proportion of club licenses
- CBD Central and CBD North had the highest proportion of hotel licences (both 20%)

#### Licensed premises operation hours

Chart 7.17 presents the permitted closing times for licensed venues in all of the city precincts in 2015. It is important to note that licensed premises may close earlier than the designated closing time agreed with OLGR. This indicates:

- One third (36%) of licensed venues close at 12am
- One quarter (23%) close at 10pm
- One in ten (10%) close at 5am, with a similar proportion closing at 3am (8%).

**Chart 7.17 – Licensed premises operation hours 2015**

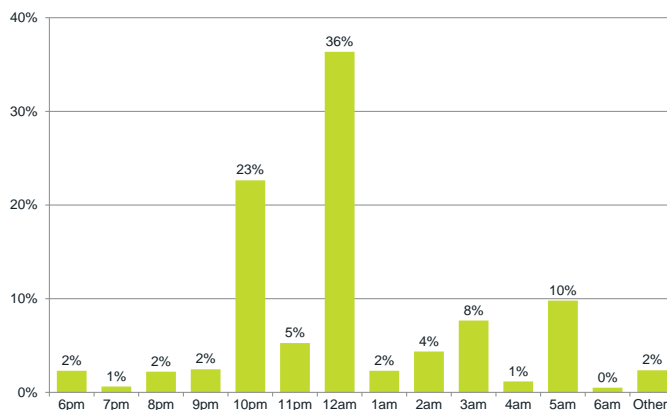


Chart 7.18, overleaf, presents the permitted closing time for licensed venues in each of the LNMAR precincts in 2015. This shows:

- Pyrmont, Surry Hills (both 34%) and Redfern (32%) had the highest proportion of licensed premises closing at 10pm
- CBD Central, CBD South (both 40%) and CBD North (47%) had the highest proportion of licensed premises closing at 12am
- CBD Central (15%) and Kings Cross (14%) had the highest proportion of licensed premises closing at 5am.

Chart 7.16 – Licensed premises type in each precinct 2015

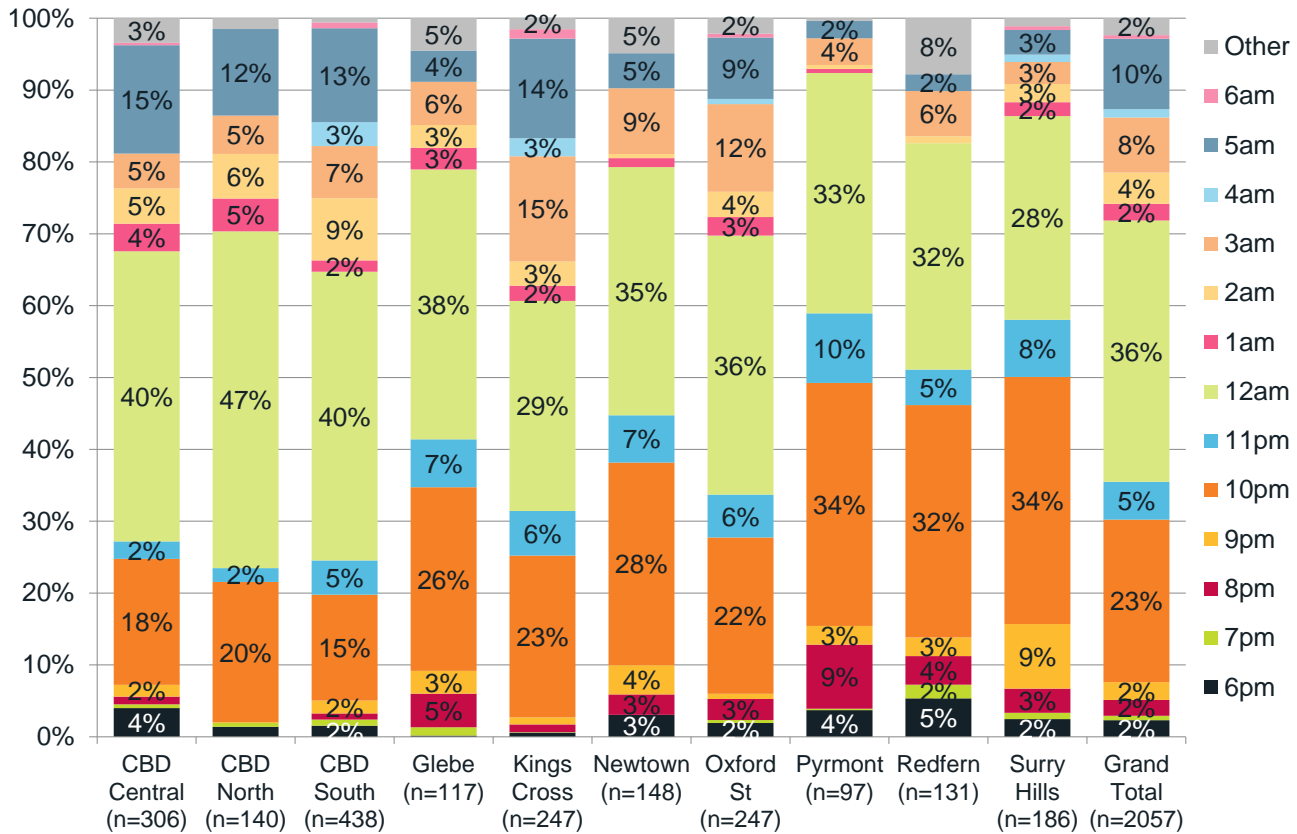
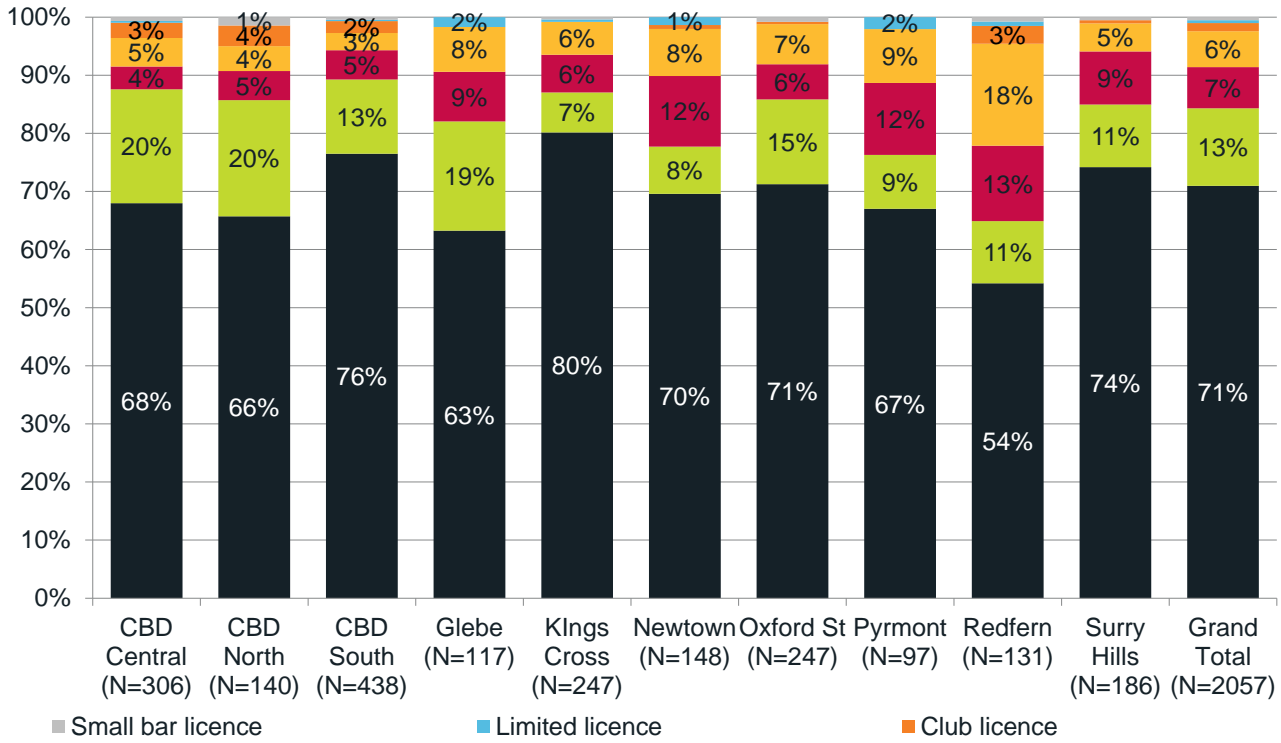


Chart 7.18 – Licensed premises closing times in each precinct 2015

# 8. Precinct surveys

## Summary

- In total 781 people took part in the intercept surveys, with a fairly even distribution of responses across all precincts
- Over half of respondents (56%) were 20-29 years old and male (53%)
- Respondents were likely to have travelled from within the City and Inner South (48%), compared with 55% in 2012. Double the proportion of people came from the Inner West (15%) compared with 2012
- Over half were going home (57%), compared with 23% in 2012 and 3% in 2010
- Less than one in six (15%) were going out to socialise within the precinct, compared with 46% in 2012 and 58% in 2010
- Those who intended to carry on socialising was low, with only 19% planning to go to another area (most often to CBD Central)
- Two fifths (41%) of people suggested that they would, or had, visited a bar, pub or club, up from 39% in 2012
- Over half (58%) of respondents either had, or intended to have, an alcoholic drink, up from 54% in 2012
- Similar to 2012, nearly half of the respondents were leaving before midnight (43%), with a quarter leaving between midnight and 2am (26%). Kings Cross still had the highest proportion of respondents leaving after 3am (25%)
- Overall, a majority of respondents (57%) felt safe in the area, and a quarter were unconcerned (24%)
- In contrast, 85% of all respondents had experienced an incident at some point which made them feel unsafe

- While most of these incidents were less serious, close to a quarter (23%) were described as serious incidents – such as fights and verbal abuse
- Strategies to improve safety were consistent with previous years, with more police (32%) being key. Better lighting (23%) was also suggested, especially in Pyrmont and CBD North
- In terms of improving the city at night, some respondents suggested more bars and clubs were needed (16%). One quarter provided other suggestions, the majority of which related to removing the “lockout” laws and allowing longer opening hours.

## Introduction

Intercept surveys were conducted with patrons of the NTE in all 10 precincts. The survey was undertaken over Friday and Saturday nights. No surveys were collected after 1am.

It is important to note sampling bias in intercept surveys. While interviewers selected a random sample of patrons, there was inevitably a bias to exclude people who were heavily intoxicated (responses may not be coherent or valid) or aggressive (occupational health and safety risk). In addition, patrons moving in larger groups were often less willing to participate.

Also when comparing results from 2012 and 2010, it is important to note that unlike the 2015 survey (which closed at 1am), both previous surveys accepted responses from patrons up to 5am. This may affect responses relating to patron intentions.

The following sections outline key findings from the surveys.

**Key findings**

**Participation**

In total **781** people took part in the precinct surveys. Table 8.1 presents the number of respondents in each precinct, with responses spread relatively evenly.

**Table 8.1 – Intercept survey respondents by precinct 2015**

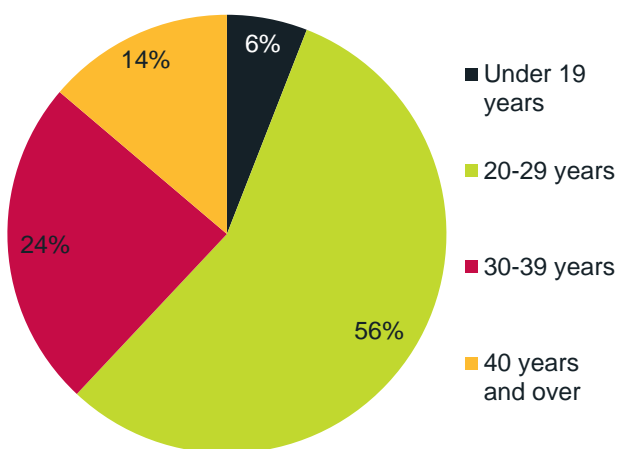
Precinct	Number of respondents	% of total respondents
CBD Central	81	10.4%
CBD North	80	10.2%
CBD South	80	10.2%
Glebe	75	9.6%
Kings Cross	82	10.5%
Newtown	76	9.7%
Oxford St	80	10.2%
Pymont	75	9.6%
Redfern	76	9.7%
Surry Hills	76	9.7%
<b>Total</b>	<b>781</b>	<b>100%</b>

**Gender and age**

There was a relatively even gender split across respondents (53% male, 47% female). This was consistent for all precincts, with the exception of Kings Cross and Oxford Street, which had a higher proportion of male respondents (66% and 62%). Glebe and CBD North had a higher proportion of female respondents (60% and 54% respectively).

Chart 8.1 indicates that over half (56%) of all respondents were between the ages of 20-29 years old, with one quarter (24%) aged 30-39 years, and less than one sixth (14%) over 40 years of age.

**Chart 8.1 – Age distribution of respondents 2015**



As outlined in Chart 8.2, age profiles have remained generally consistent over time, with a slight increase in the proportion of people aged 30-39 years (+8% since 2010) and 40+ years (+7% since 2010).

**Chart 8.2 – Age profile comparison**

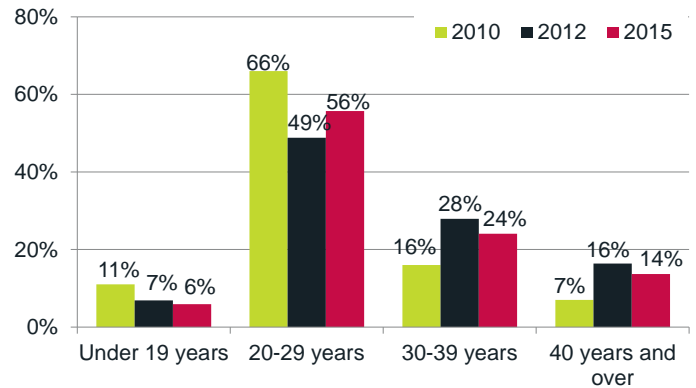
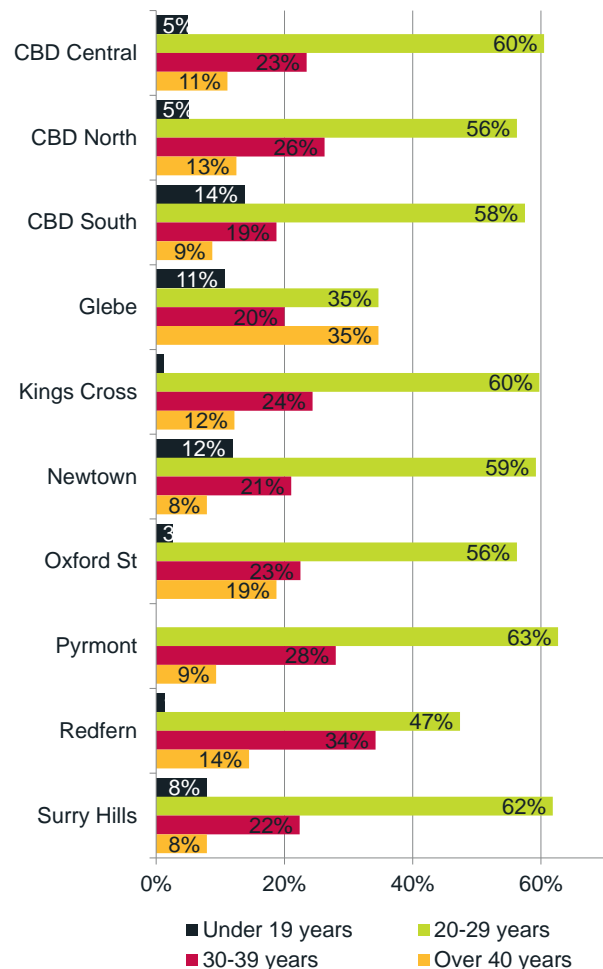


Chart 8.3 presents the age breakdown for patrons in each of the precincts. This shows:

- CBD South (14%) had the highest proportion of patrons under the age of 19 years, followed by Newtown (12%)
- Pymont (63%) had the highest proportion of patrons aged 20-19 years, followed by Surry Hills (62%)
- Glebe (35%) had the highest proportion of patrons over the age of 40 years.

**Chart 8.3 – Age profile by precinct 2015**

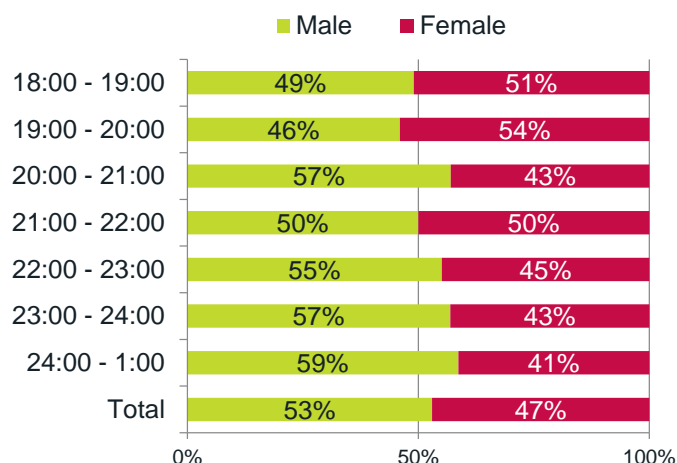


### Survey timing

This year the precinct surveys aimed to achieve an even distribution of survey responses between early evening (before 10pm) and late night (after 10pm). In total, just over half (55%) of all respondents were interviewed before 10pm, with the remaining responses (45%) recorded between 10pm and 1am.

Chart 8.4 indicates that after 10pm there was a slightly higher proportion of male respondents compared to females.

**Chart 8.4 – Gender profile by time of interview 2015**



The age profile of respondents was relatively consistent across the night, although a higher proportion of respondents younger than 18 years were interviewed after 12pm (33%) compared to other age groups.

**Table 8.2 – Top 10 Home locations 2015**

Place of residence	CBD Central (n=81)	CBD North (n=80)	CBD South (n=80)	Pymont (n=75)	Kings Cross (n=82)	Oxford St (n=80)	Surry Hills (n=76)	Redfern (n=76)	Newtown (n=76)	Glebe (n=75)	Total (n=781)
City & Inner South	25%	35%	35%	49%	45%	65%	55%	66%	51%	55%	48%
Inner West	26%	14%	14%	8%	10%	10%	8%	12%	28%	25%	15%
Eastern Suburbs	7%	15%	15%	9%	21%	10%	13%	7%	7%	3%	11%
Greater Western Sydney	16%	6%	6%	9%	12%	1%	4%	0%	3%	4%	6%
North Sydney & Hornsby	6%	4%	6%	5%	1%	5%	5%	0%	1%	4%	4%
Northern Beaches	7%	6%	10%	3%	4%	6%	4%	3%	4%	3%	5%
Southern Sydney	6%	8%	5%	1%	1%	0%	5%	7%	5%	4%	4%
Other NSW	2%	3%	5%	1%	0%	1%	1%	0%	1%	1%	2%
Inner South West	2%	3%	3%	0%	0%	1%	3%	0%	0%	0%	1%
North West	0%	0%	0%	5%	1%	0%	0%	0%	0%	0%	1%
Other Australia	0%	3%	1%	3%	2%	0%	0%	0%	0%	1%	1%
Other Overseas	0%	5%	0%	4%	2%	0%	1%	0%	0%	0%	1%
South West	0%	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%
Don't know / can't say	1%	0%	0%	1%	0%	0%	0%	5%	0%	0%	1%

### Home location

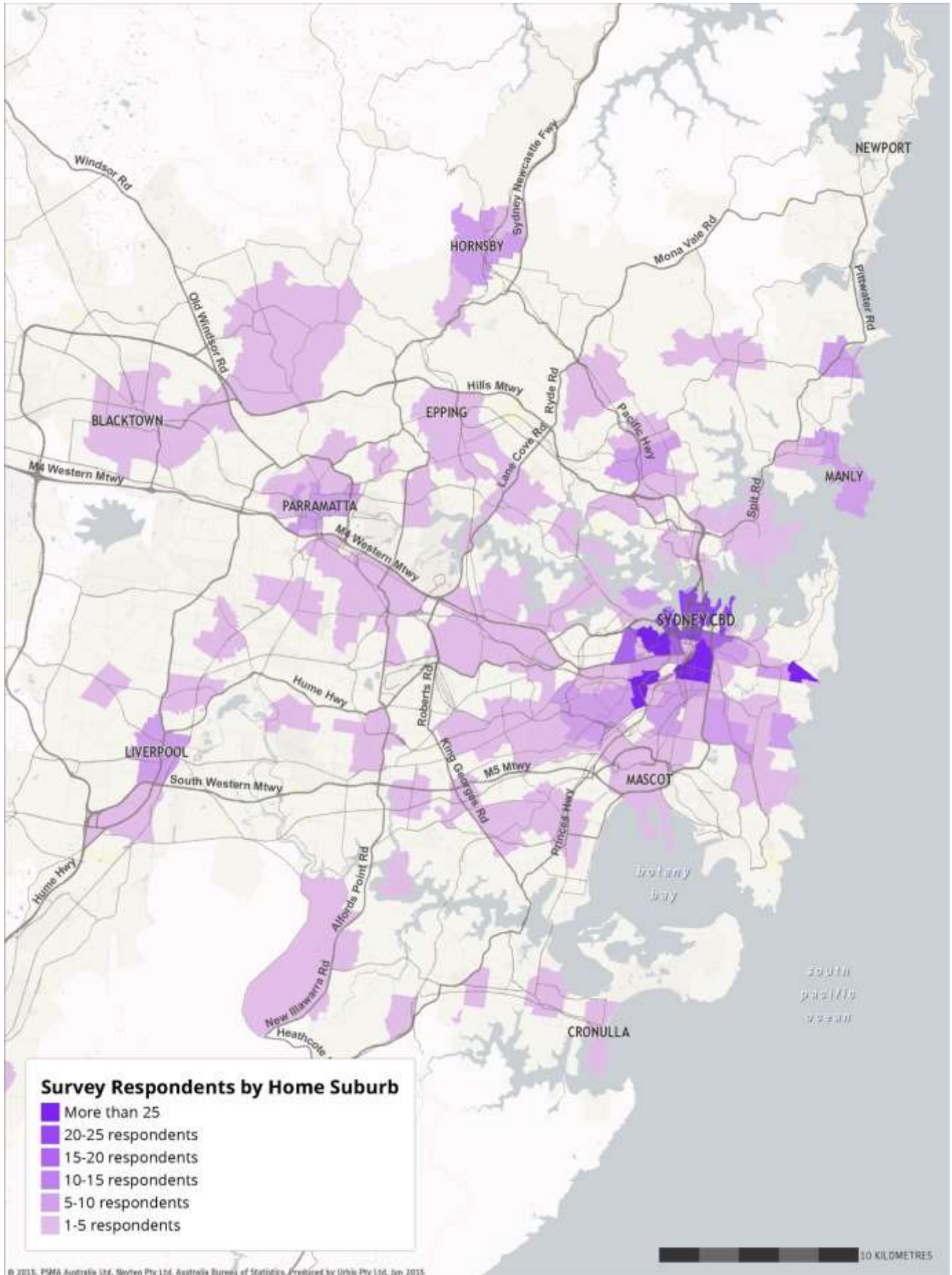
Respondents were asked for the name of their home suburb or postcode. Figure 8.1 presents the home suburbs for each respondent interviewed.

Table 8.2 presents the Top 10 responses for home location across each precinct. In total nearly half (48%) of all respondents lived in the City & Inner South. This was an increase from the 2010 survey (40%), but a slight decrease from 2012 (55%). City & Inner South was the top home location of respondents in all precincts. However, respondents from this area were less represented in CBD Central (25%), CBD North and CBD South (both 35%), compared to other precincts.

Almost one in six respondents (15%) lived in the Inner West, which is almost double the proportion of respondents from this area since 2012. Respondents from this area were more strongly represented in Newtown (28%), CBD Central (26%) and Glebe (25%).

More than one in ten respondents (11%) lived in the Eastern Suburbs, consistent with 2012. Respondents from this area were more strongly represented in Kings Cross (21%), CBD South (15%) CBD North (15%) and Surry Hills (13%).

Figure 8.1 – Respondents home suburb





**Reasons for visiting the NTE**

Respondents were asked why they were visiting the city at night. Chart 8.5 presents a comparison of the responses received in 2010, 2012 and 2015.

In 2010 and 2012, the most popular activity in the city at night was going out and socialising (58% and 46% of respondents). In 2015, less than one in six respondents (15%) were going out and socialising in the city at night.

This decrease coincided with an increase in the proportion of respondents who suggested they were returning home (57% in 2015 compared to 23% in 2012 and only 3% in 2010).

The proportion of respondents shopping in the city at night has increased (from 2% in 2010 up to 9% in 2015), while the number of respondents going to work in the city has decreased (from 9% in 2012 down to 1% in 2015).

**Chart 8.5 – Reason for visiting the NTE 2015, 2012, and 2010 comparison**

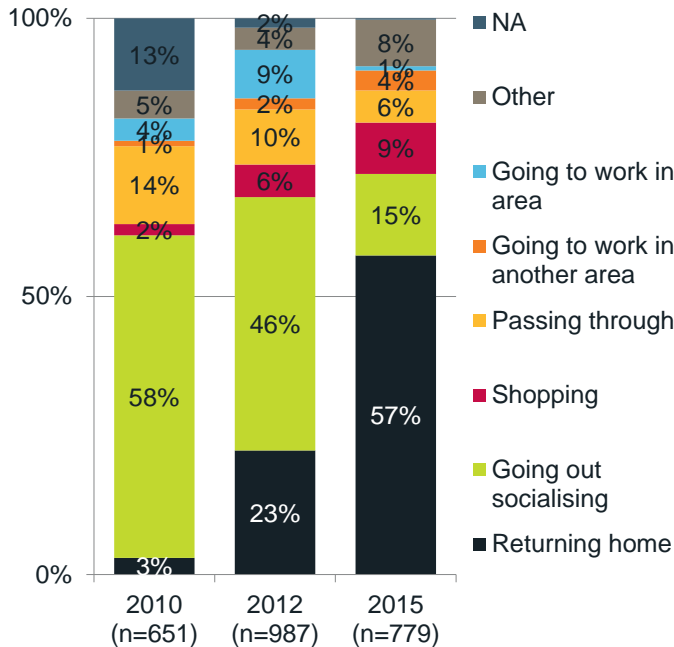
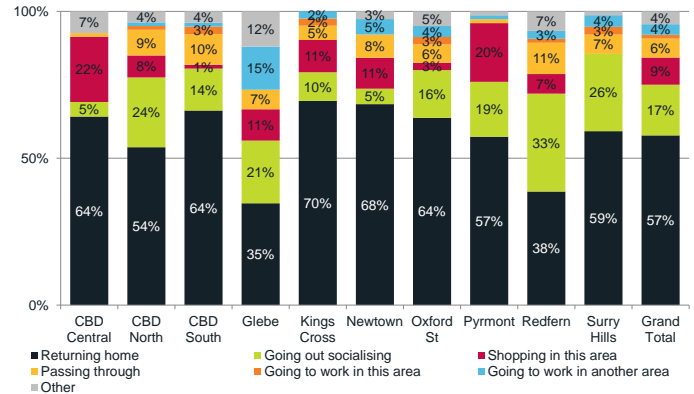


Chart 8.6 presents the main reasons for visiting each precinct in 2015. This indicates:

- Kings Cross, the traditional centre of the NTE in the city, had the highest proportion of respondents who were going home (70%), followed by Newtown (68%)
- The traditionally quieter villages of Redfern (33%), Surry Hills (26%) and Glebe (21%) had the highest proportion of respondents who were going out socialising, along with CBD North (24%)
- Newtown (5%), CBD Central (5%) and Kings Cross (10%) had the smallest proportion of respondents who were going out socialising.

**Chart 8.6 – Reasons for visiting precinct 2015**

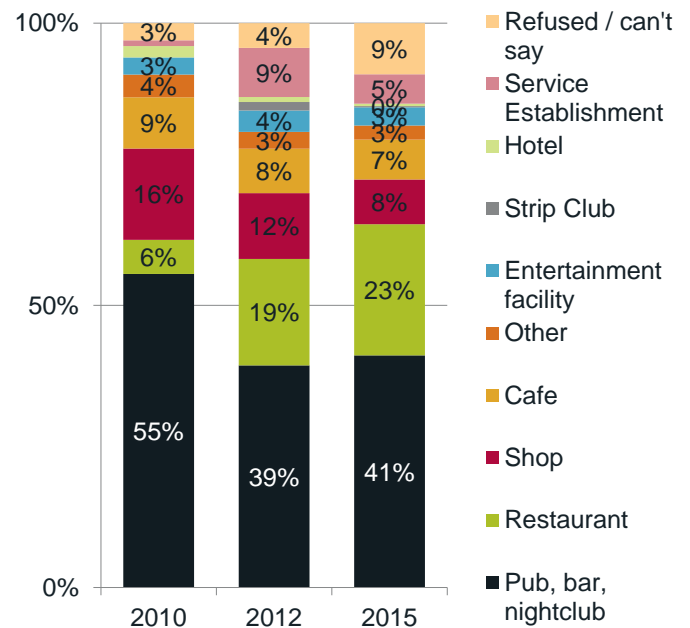


**Attractions visited**

Respondents were asked what kind of places they intended to visit in the precinct. multiple responses were collected. Chart 8.7 presents a comparison of the responses received in 2010, 2012, and 2015.

As in 2012, the most common response in 2015 was visiting a pub, bar or nightclub (41%). This is similar to 2010 (55%). Other popular attractions in 2015 included going to a restaurant (23%), or shop (9%).

**Chart 8.7 – Attractions visited in the NTE 2015, 2012, and 2010 comparison**

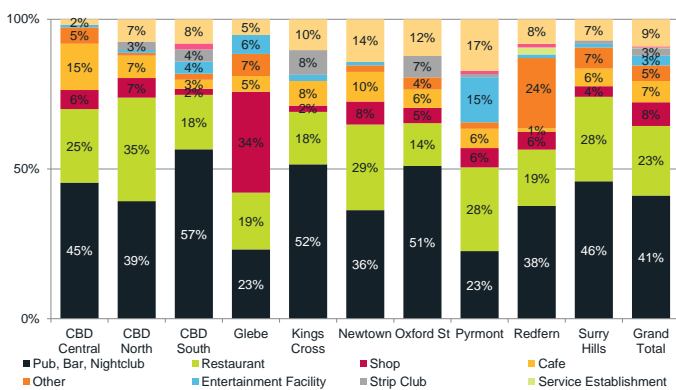


As over half indicated that they were going home from the precinct (see Chart 8.5), it is anticipated that responses to this question may relate to activities or venues visited earlier in the day, rather than places people were intending to visit during the evening and night.

Chart 8.8 overleaf presents the main attractions visited in each precinct in 2015. This indicates:

- CBD South (57%) had the highest number of responses related to visiting pubs, bars and nightclubs, followed by Kings Cross (52%) and Oxford Street (51%)
- CBD North had the highest proportion of responses related to visiting restaurants (35%), followed by Newtown (29%) and Surry Hills and Pyrmont (both 28%)
- Glebe had the highest proportion of responses related to going shopping (34%), which was significantly higher than all other precincts
- Pyrmont (15%) had the highest proportion of respondents visiting entertainment facilities – which may possibly be attributed to the location of the Star Casino in this precinct.

Chart 8.8 – Attractions visited 2015



**Alcohol consumption**

Respondents were asked if they had, or intended to have, an alcoholic drink during the night. Table 8.3 compares responses in 2015 and 2012. This shows that in 2012 over half (54%) of patrons had or intended to have a drink, increasing to 58% in 2015.

This was most frequently reported in Oxford Street (75%), CBD South (66%), Kings Cross (65%) and Surry Hills (64%). It was least frequently reported in Pyrmont (36%).

There was a large increase since 2012 for Oxford Street (+18%), Redfern (+14%), and CBD South (+13%). There is a decrease since 2012 for Pyrmont (-17%) and Newtown (-8%).

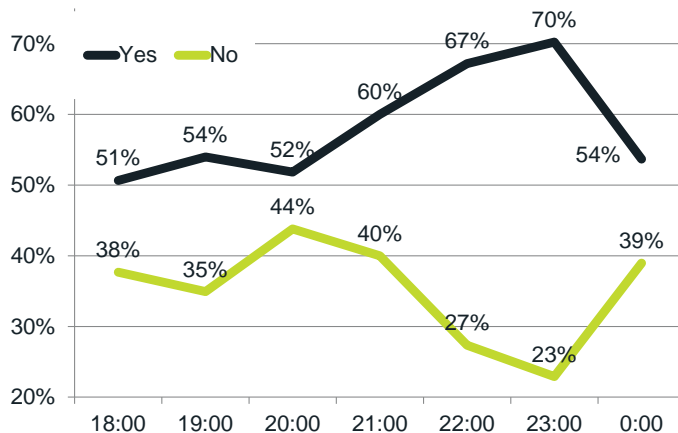
Table 8.3 – Alcohol consumption

Precinct	2012	2015	Change
CBD Central	-	54%	-
CBD North	-	54%	-
CBD South	53%	66%	+13%
Glebe	53%	56%	+3%
Kings Cross	55%	65%	+10%
Newtown	58%	50%	-8%
Oxford St	57%	75%	+18%
Pyrmont	53%	36%	-17%
Redfern	43%	57%	+14%
Surry Hills	52%	64%	+12%
<b>Grand Total</b>	<b>54%</b>	<b>58%</b>	<b>+4%</b>

A slightly higher proportion of males (55%) indicated that they planned on having an alcoholic drink, compared to 44% of females.

Chart 8.9 outlines alcohol consumption in 2015 by time and shows a peak in the proportion of respondents who intended to drink in the evening (9-11pm). At 8pm over half of all respondents (52%) intended to drink. This rose to over two thirds (70%) by 11pm, before decreasing again to 54% at midnight.

Chart 8.9– Alcohol consumption 2015



**Socialising prior to visiting**

International literature has suggested that pre-loading can have an impact on antisocial behaviour in the NTE. Respondents were asked if they had been out working or socialising in other areas before they came to the precinct.

Consistent with 2012, in 2015 just over half (51%) of all respondents had come to the precinct straight from home. Around one fifth (19%) had come from work, and one eighth (12%) had come from a friend's place.

In 2015 only one in ten respondents (10%) had been socialising in another area before visiting the precinct. This is a large change from 2010 and 2012 when two

fifths (42% and 44% respectively) had been socialising in another area before visiting the precinct.

Newtown (80%) had the highest proportion of respondents who had come straight from home, while Surry Hills (18%) had the highest proportion of respondents who had been socialising elsewhere.

**Location prior to precinct visit**

Of those people who had been working, at friends or socialising in other areas (n=365), one third (33%) had been somewhere other than the city. A similar proportion came from within the CBD (32%).

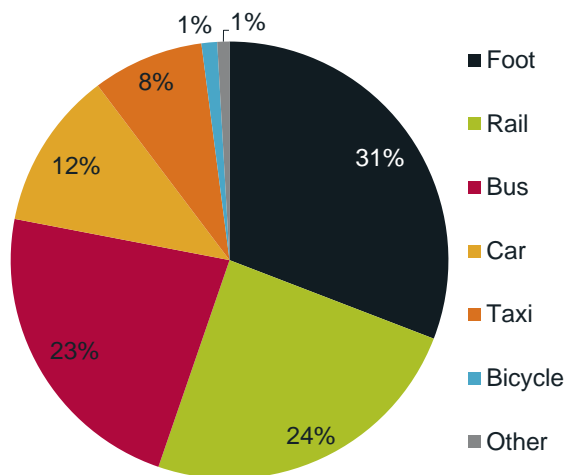
Table 8.4 presents the reported location of respondents prior to visiting the precinct. This indicates that:

- The CBD precincts attracted a high proportion of patrons from within the CBD (e.g. after work)
- Newtown attracted a high proportion of patrons from wider areas (45%) and Surry Hills (24%)
- A third of patrons in Oxford Street had either come from Surry Hills (35%) or an area outside the precincts (33%)
- Nearly half of respondents in Glebe (48%) had come from the CBD, with 35% coming from Pyrmont.

**Mode of travel to precincts**

As in 2012, the most popular mode of travel to all precincts was by foot (31%). Close to one quarter (24%) of respondents arrived by rail, and a similar proportion by bus (23%). In general, private cars (12%) were preferred over taxi transport (8%).

**Chart 8.10 – Mode of travel to precincts 2015**



The most popular modes of travel differed for each precinct:

- Walking was the most popular way to get to Oxford Street (49%), Pyrmont (42%), Kings Cross (38%) and Redfern (38%)
- Rail travel was the most popular way to get to CBD Central (53%), CBD North (39%) and Redfern (39%)
- Bus travel was the most popular way to get to Glebe (55%), Surry Hills (30%) and CBD South (30%)
- Taxi travel was the most popular way to get to Surry Hills (22%) and CBD North (11%).

**Table 8.4 – Location prior to precinct visit 2015**

Previous location	CBD Central (n=40)	CBD North (n=52)	CBD South (n=48)	Glebe (n=35)	Kings Cross (n=36)	Newtown (n=15)	Oxford St (n=33)	Pyrmont (n=23)	Redfern (n=37)	Surry Hills (n=46)	Total (n=365)
Another area	45%	25%	42%	13%	39%	45%	33%	27%	27%	26%	33%
CBD	<b>38%</b>	<b>56%</b>	<b>40%</b>	48%	22%	18%	15%	24%	27%	20%	32%
Glebe	13%	0%	4%	<b>0%</b>	0%	0%	0%	0%	7%	34%	5%
Kings Cross	0%	0%	0%	0%	<b>14%</b>	3%	0%	0%	0%	0%	2%
Newtown	5%	4%	4%	0%	6%	<b>0%</b>	0%	11%	20%	9%	5%
Oxford St	0%	0%	0%	0%	0%	9%	<b>11%</b>	0%	0%	0%	2%
Pyrmont	0%	2%	0%	35%	0%	0%	0%	<b>0%</b>	0%	3%	3%
Redfern	0%	8%	2%	4%	0%	0%	0%	22%	<b>20%</b>	3%	5%
Surry Hills	0%	2%	4%	0%	0%	24%	35%	5%	0%	<b>0%</b>	8%
Not stated	0%	4%	4%	0%	19%	0%	7%	11%	0%	6%	5%

### Socialising post precinct visit

Respondents were asked if they planned on going out eating, drinking or socialising in other areas before going home. Over half (57%) of respondents intended to go home, compared to under half in 2012 (48%). Less than one in five were planning on going out socialising (19%), compared to 22% in 2012. Chart 8.11 shows:

- Respondents were most likely to say they were going home in Newtown (87%), Pyrmont (80%) and Glebe (80%). This represents a large increase on 2012 (59%, 43% and 34% respectively).
- CBD Central had the highest proportion of respondents who were going out (43%), followed by Surry Hills (30%), CBD South and Redfern (both 21%). This represents a large increase on 2012 (5%, 27% and 16% respectively).

Of those respondents who suggested they would go and socialise in other areas (n=212), close to half (44%) said they would go to the CBD. Less than one in ten (9%) said they would go to Pyrmont, and only 6% suggested they would go to Newtown or Surry Hills. Table 8.5 shows:

- Most respondents (82%) in CBD Central said they were staying in the CBD, compared with half in CBD North (47%) and one third (30%) in CBD South
- Most respondents in Glebe (67%) and Oxford Street (62%) were heading to the CBD
- Close to half of all respondents in Newtown (50%) were heading to locations outside the precincts. This is based on a very small number of respondents, given most people (87%) said they were going home.

Chart 8.11 – Socialising post precinct visit 2015

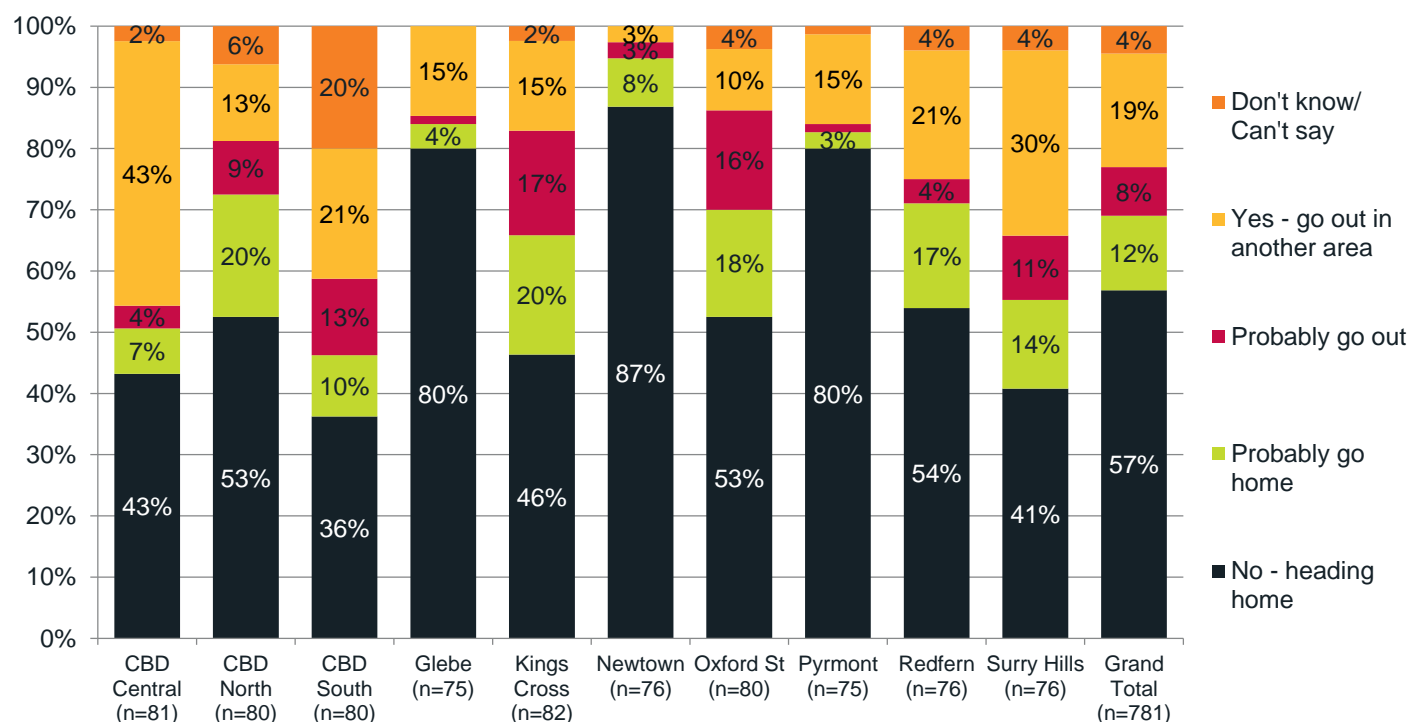


Table 8.5 – Location post precinct visit 2015 (n=212)

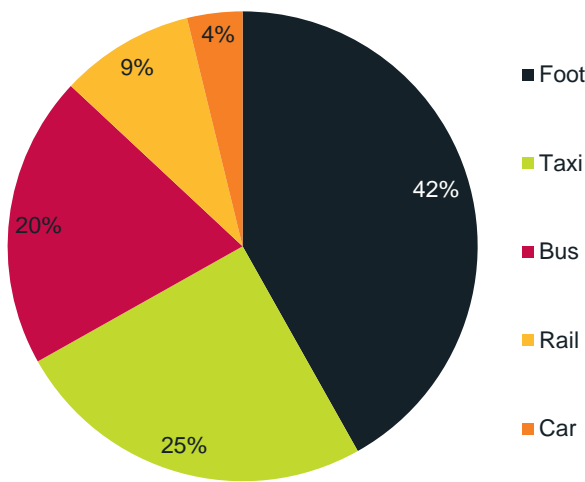
Current precinct	CBD Central (n=38)	CBD North (n=18)	CBD South (n=28)	Glebe (n=12)	Kings Cross (n=28)	Newtown (n=4)	Oxford St (n=21)	Pyrmont (n=12)	Redfern (n=20)	Surry Hills (n=31)	Total (n=212)
Next destination											
CBD	82%	47%	30%	67%	31%	25%	62%	25%	11%	32%	44%
Glebe	0%	0%	4%	17%	0%	0%	0%	17%	0%	0%	2%
Kings Cross	5%	12%	0%	0%	0%	0%	5%	0%	0%	10%	4%
Newtown	0%	12%	7%	8%	8%	0%	10%	0%	11%	3%	6%
Oxford St	0%	6%	19%	0%	4%	0%	0%	0%	0%	0%	3%
Pyrmont	0%	18%	7%	0%	19%	0%	5%	17%	5%	13%	9%
Redfern	0%	0%	0%	0%	0%	0%	0%	0%	16%	0%	1%
Surry Hills	5%	6%	15%	0%	8%	0%	0%	0%	11%	3%	6%
Other location	5%	0%	4%	8%	31%	50%	14%	33%	16%	23%	15%
Don't know	3%	0%	15%	0%	0%	25%	5%	8%	32%	16%	9%

**Mode of travel post precinct visit**

Respondents planning to go to another area were asked how they intended to travel there. Two fifths (42%) intended to walk, a quarter (25%) intended to travel by taxi, and a fifth intended to travel by bus. Interestingly, despite the proximity to train stations of many of the precincts, travel by rail was only identified by 9% of respondents. Chart 8.12 presents all modes of travel identified for respondents after their visit to the precincts.

Since 2012, there was an increase in the proportion of respondents intending to travel on all modes, especially by foot (33% in 2012) and bus (15% in 2012). There was also a large decrease in reported travel by rail (down from 18% in 2012).

**Chart 8.12 – Mode of travel post precinct visit 2015**



The most popular modes of travel between precincts differed substantially and were influenced by a range of locational factors. Trends included:

- Walking was the most popular mode for respondents going to the three CBD precincts – CBD Central (84%), CBD South (52%) and CBD North (38%)
- Bus travel was the most popular among those going to Newtown (100%, however was based on a low response rate), Glebe (67%) and Surry Hills (35%)
- Taxi travel was most popular among those going to Oxford Street (57%), CBD North (43%) and Kings Cross (38%)
- Rail travel was most popular among those going to Kings Cross (15%) and CBD North (14%).

**Departure times**

Respondents were asked what time they were planning to go home. Over two fifths (43%) of respondents planned to return home before midnight, with one third (36%) returning between midnight and 3am, and less than one in ten (6%) later than 3am.

When compared to 2012, the 2015 profile showed a small increase in the proportion leaving before midnight (from 39% in 2012) but the same proportion of respondents leaving before 3am (37%).

Chart 8.13 presents the departure times for all respondents in 2015 compared to those in 2012.

**Chart 8.13 – Departure times 2015 and 2012**

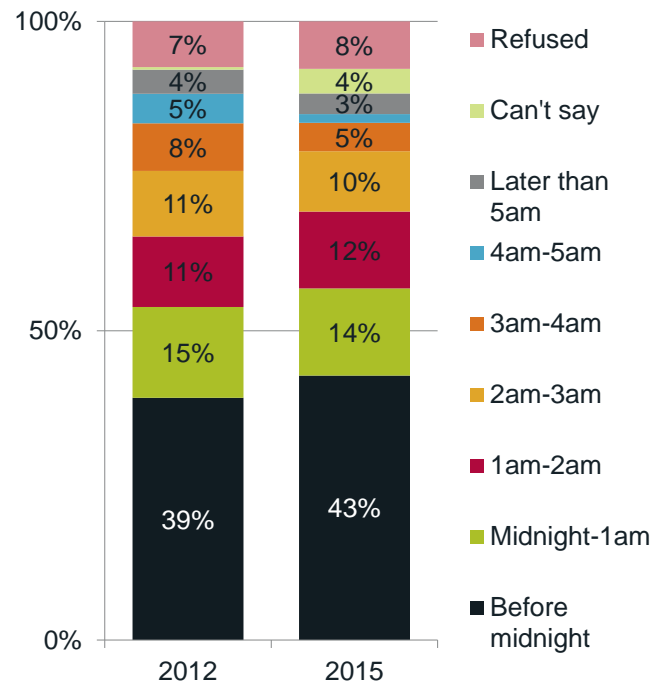
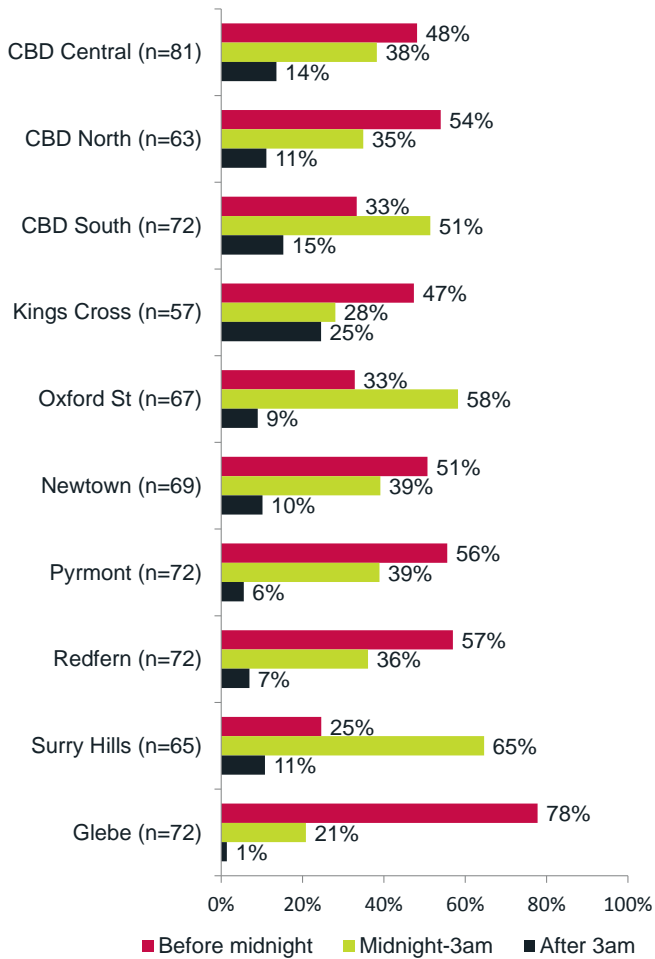


Chart 8.14 presents the departure times for each precinct in 2015. This shows:

- Glebe (78%), Redfern (57%) and Pyrmont (56%) had the highest proportions of respondents leaving before midnight
- Surry Hills (65%) and Oxford Street (58%) had the highest proportions of respondents leaving between midnight and 3am
- Kings Cross (25%) and CBD South (15%) had the highest proportions of respondents leaving after 3am.

Chart 8.14 – Departure times by precinct<sup>24</sup>



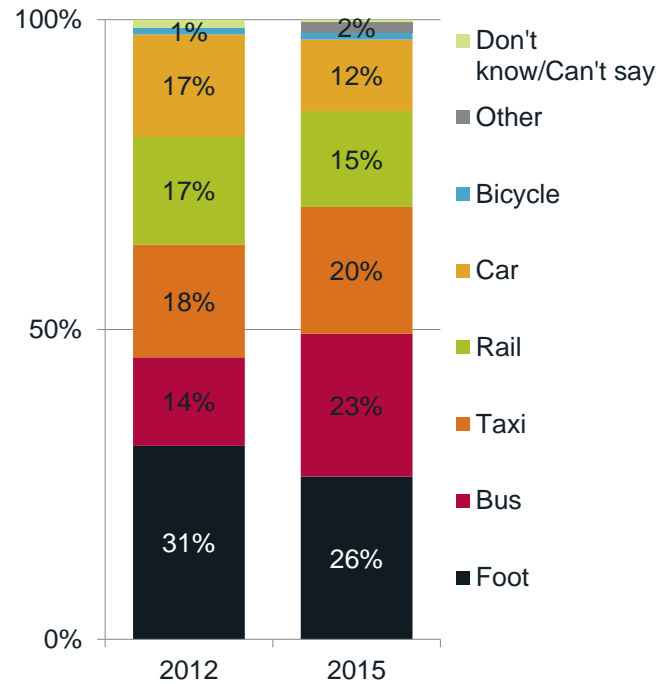
**Mode of travel home**

All respondents were asked how they intended to travel home, or to where they were staying. Over a quarter indicated that they would travel home on foot (26%), and a similar proportion by bus (23%). One fifth indicated that they would travel home by taxi (20%), compared to 12% by private car.

Chart 8.15 presents all modes of travel for respondents returning home in 2015 compared to responses in 2012.

Since 2012 there has been an increase in the proportion of respondents intending to travel home by bus (14% in 2012, 23% in 2015), and a decrease in all other modes, with the exception of taxi travel (which remained relatively stable).

Chart 8.15 – Mode of travel home



The most popular modes of travel home differ for each precinct, including:

- Walking was the most popular mode for respondents in Redfern (47%), Pyrmont (38%) and Kings Cross (36%)
- Rail travel was most popular in CBD Central (36%) or CBD North (26%)
- Bus travel was most popular in Glebe (51%) and Newtown (39%)
- Taxi travel was most popular in Oxford Street (47%).

**Incidents observed or experienced**

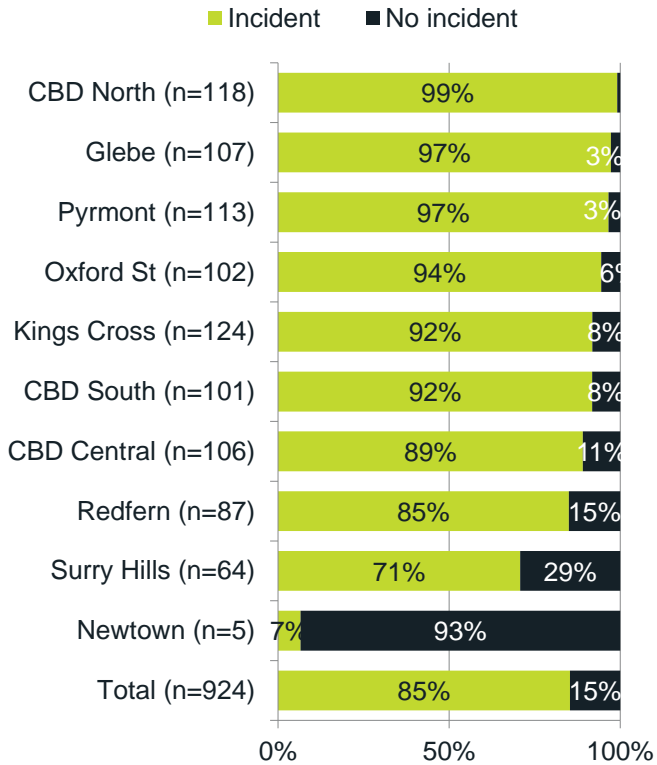
All respondents were asked whether they had observed or experienced anything that made them feel unsafe during their time in the precinct. Multiple responses were provided.

Most (85%) said they had experienced an incident which made them feel unsafe.

Chart 8.16 shows the proportion of respondents who observed or experienced an incident in each precinct. The profile was relatively consistent across all precincts, with the exception of Newtown, where only 7% of respondents had experienced an incident.

<sup>24</sup> Excluding 'refused', and 'can't say' responses.

Chart 8.16 – Rate of observed incidents



Respondents were asked to identify the types of antisocial behaviour (ASB) that they had experienced. Chart 8.17 identifies the type of incidents observed and experienced by respondents. This suggests that the majority of incidents (77%) were less serious.

Chart 8.17 – Serious and less serious ASB

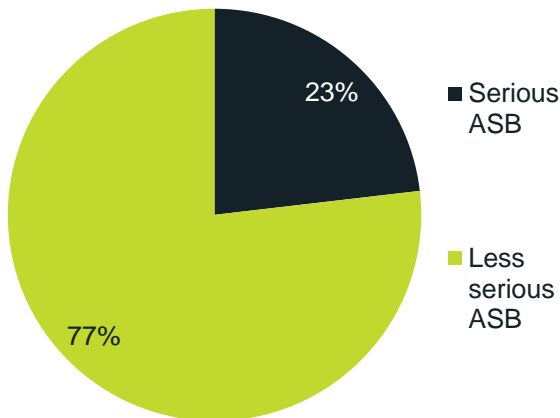
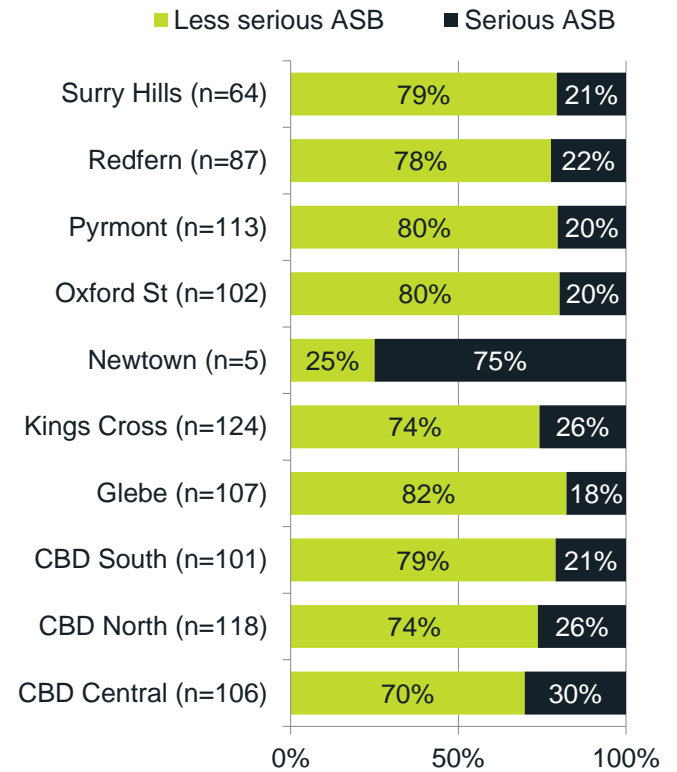


Chart 8.18 indicates that a higher proportion of serious ASB was recorded in CBD Central (30%), CBD North (26%) and Kings Cross (26%). While Newtown also observed a high proportion of serious incidents (75%) this was based on a small number of respondents who identified an incident (Chart 8.16).

Chart 8.18 – Serious and less serious ASB by precinct



The timing of ASB incidents was relatively evenly spread across the night, however a slightly higher proportion of incidents was observed before 9pm (53%) compared to after 9pm (47%).

Chart 8.19 shows a breakdown of the type of incidents observed or experienced by all respondents.

- Close to one third (38%) felt unsafe due to loud music
- One in five (21%) felt unsafe due to drunken staggering/falling
- One in eight (14%) felt unsafe due to shouting and verbal abuse.

Chart 8.19 – Type of incidents observed

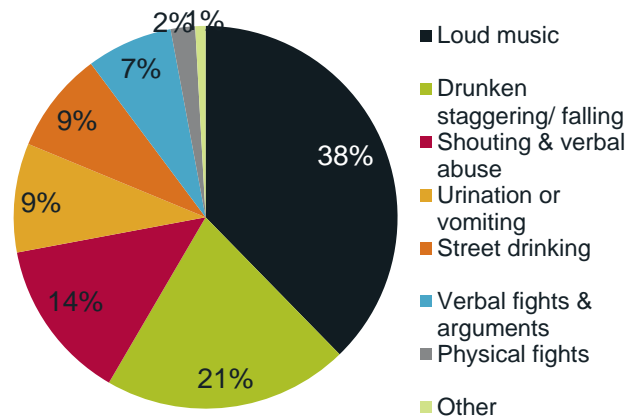


Chart 8.20 – Type of ASB by precinct

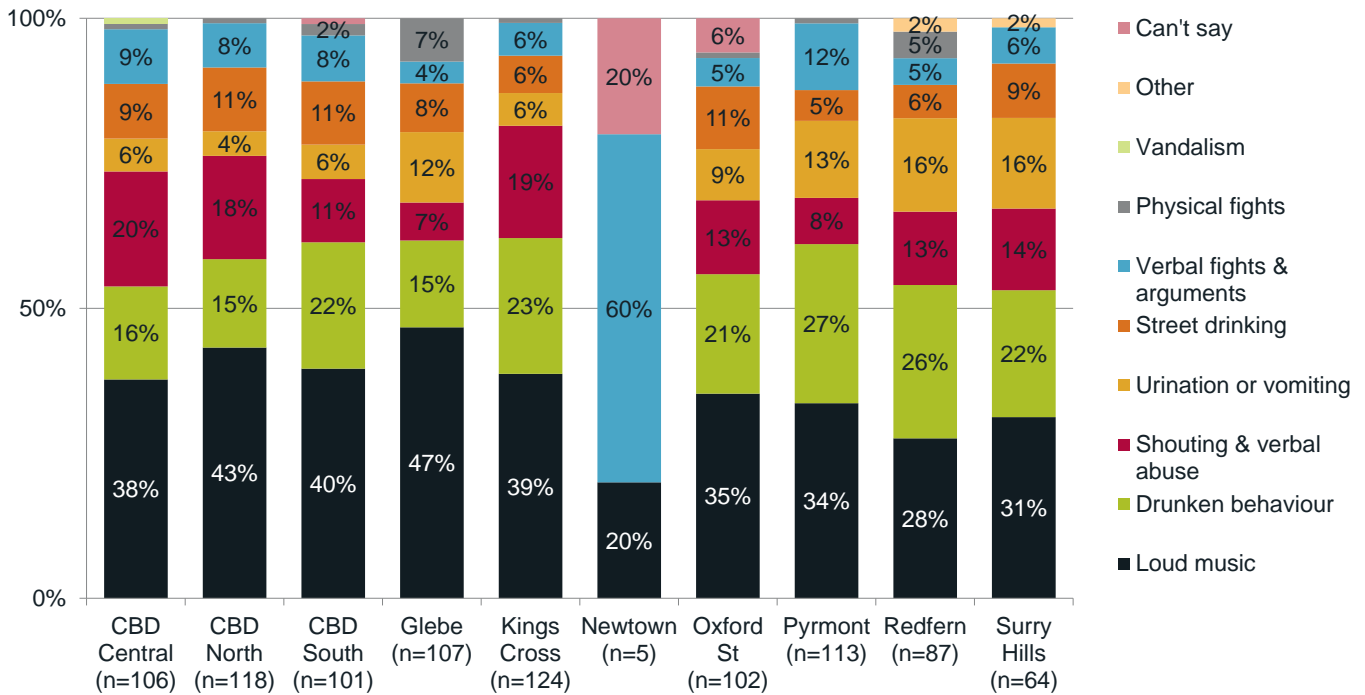


Chart 8.20 shows the type of incidents experienced by respondents in each precinct. This shows:

- Newtown observed the highest proportion of verbal fights (60%) however there was a small number of incidents
- Glebe (47%) and CBD North (43%) experienced the highest proportion of loud music incidents
- Pyrmont (27%) and Redfern (26%) reported the highest proportion of drunken behaviour
- CBD Central (20%) and Kings Cross (19%) observed the highest proportion of verbal abuse.

Respondents were also asked how safe or unsafe they felt. Overall, over half (57%) felt safe or very safe, with a quarter (24%) unconcerned. One in six (17%) felt unsafe or very unsafe.

Chart 8.21 provides a comparison of respondents' feelings of safety in 2012 and 2015. While levels of safety have remained relatively similar (60% felt safe in 2012, 57% in 2015) there has been an increase in the proportion of people who felt very safe (from 15% to 23%) and unconcerned (from 18% to 24%).

Chart 8.21 – Perceptions of safety 2015 and 2012

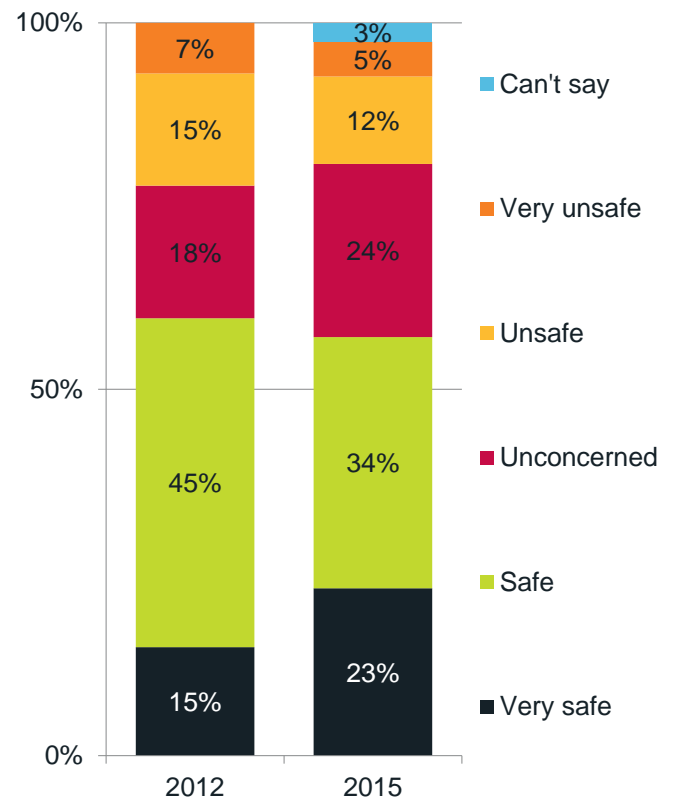




Chart 8.22 – Perceptions of safety by precinct

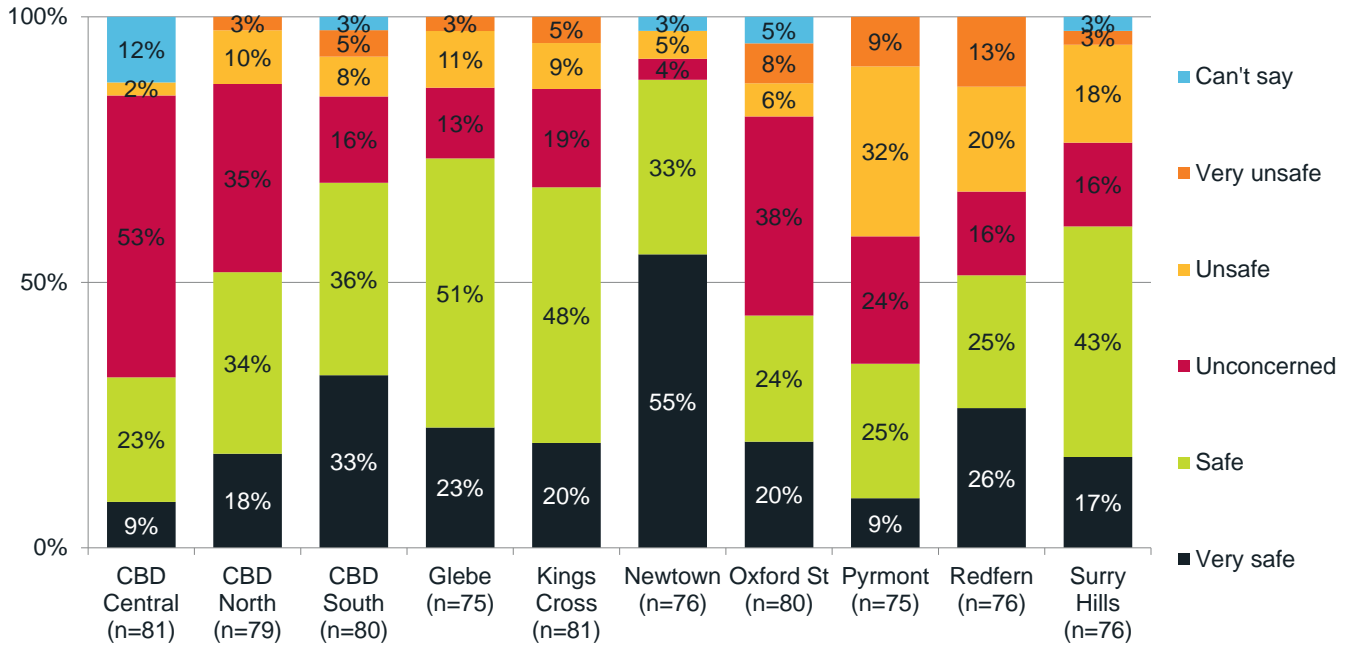


Chart 8.22 shows perceptions of safety in each precinct.

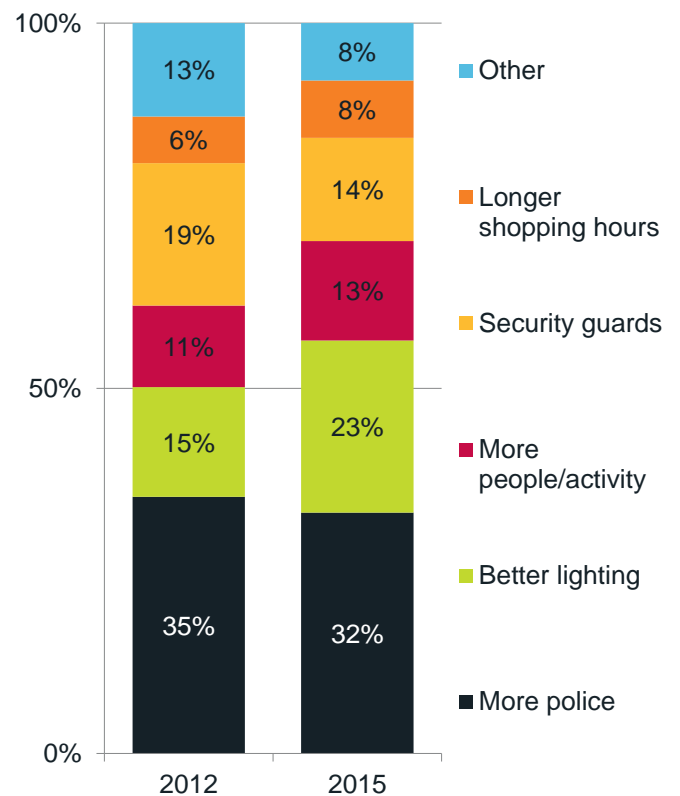
- The majority of respondents in Newtown (88%) felt safe or very safe
- Over half of all respondents in CBD Central (53%) were unconcerned
- Pyrmont had the highest proportion of respondents that felt unsafe or very unsafe (41%), followed by Redfern (33%) and Surry Hills (21%).

**Triggers to improve safety**

Those respondents who identified feeling unsafe or very unsafe (n=130) were asked what they thought would reduce crime and increase feelings of safety in the precinct. Overall the most popular initiatives were more police (32%) and better lighting (23%). This was consistent with 2012. Chart 8.23 presents the triggers to improve safety in 2012 and 2015.

There were few variances between each precinct in terms of the triggers for improved safety. More police was the most frequent response for all precincts with the exception of Pyrmont and CBD North. In these areas, better lighting was the most frequent response to improve feelings of safety (31% and 33% respectively).

Chart 8.23 – Triggers to improve safety 2015 and 2012



**Improvements to the Night Time Economy**

Finally, all respondents were asked what they would like to see in the area at night to encourage them to visit more often. Respondents were asked to select from a number of suggestions to improve the night time economy.

Chart 8.24 indicates that one quarter of respondents provided an “other” response. Of these responses, close to one third (29%) related to general night life improvements with the majority suggesting “no more lockouts” and referring to the lock out restrictions. Other comments also referred to more security and police (24%) and better environmental conditions and amenity (17%).

Also, one in six (16%) suggested that more bars, clubs and pubs were needed to attract people to the city at night. One in ten (11%) respondents provided positive comments about the city at night or suggested it was currently good.

**Chart 8.24 – Improvements to the NTE**

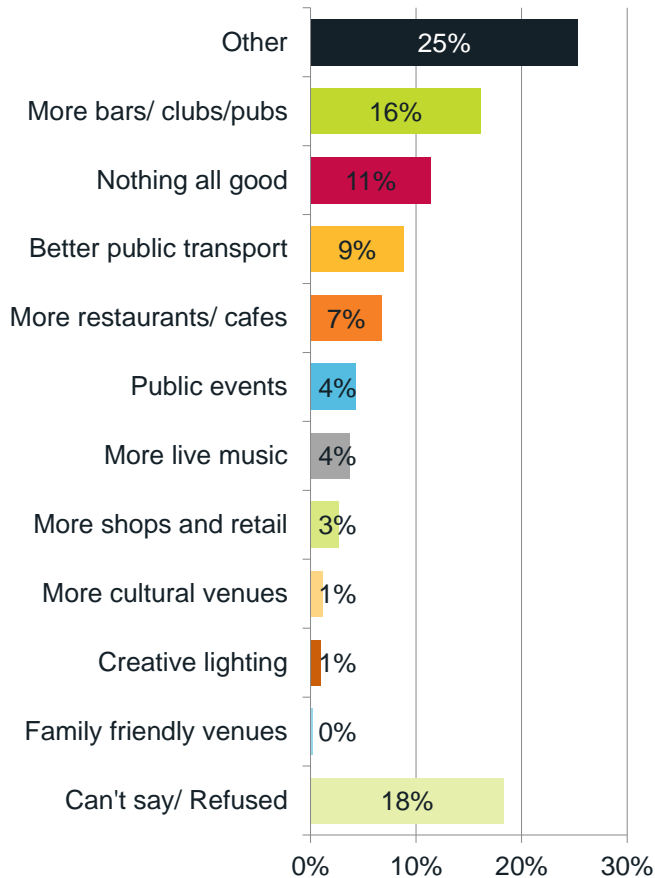


Chart 8.25 overleaf presents the responses by each precinct. This shows:

- Newtown had the highest proportion of respondents who suggested no changes were needed (59%)
- Oxford Street (48%) and Surry Hills (30%) had the highest proportion of respondents who wanted to see more pubs/bars/clubs open

- Surry Hills (26%) and Glebe (19%) had the highest proportion of respondents who suggested better public transport was required to attract people to the area
- Kings Cross (43%) followed by CBD South (40%) and Redfern (38%) had the highest proportion of other comments.

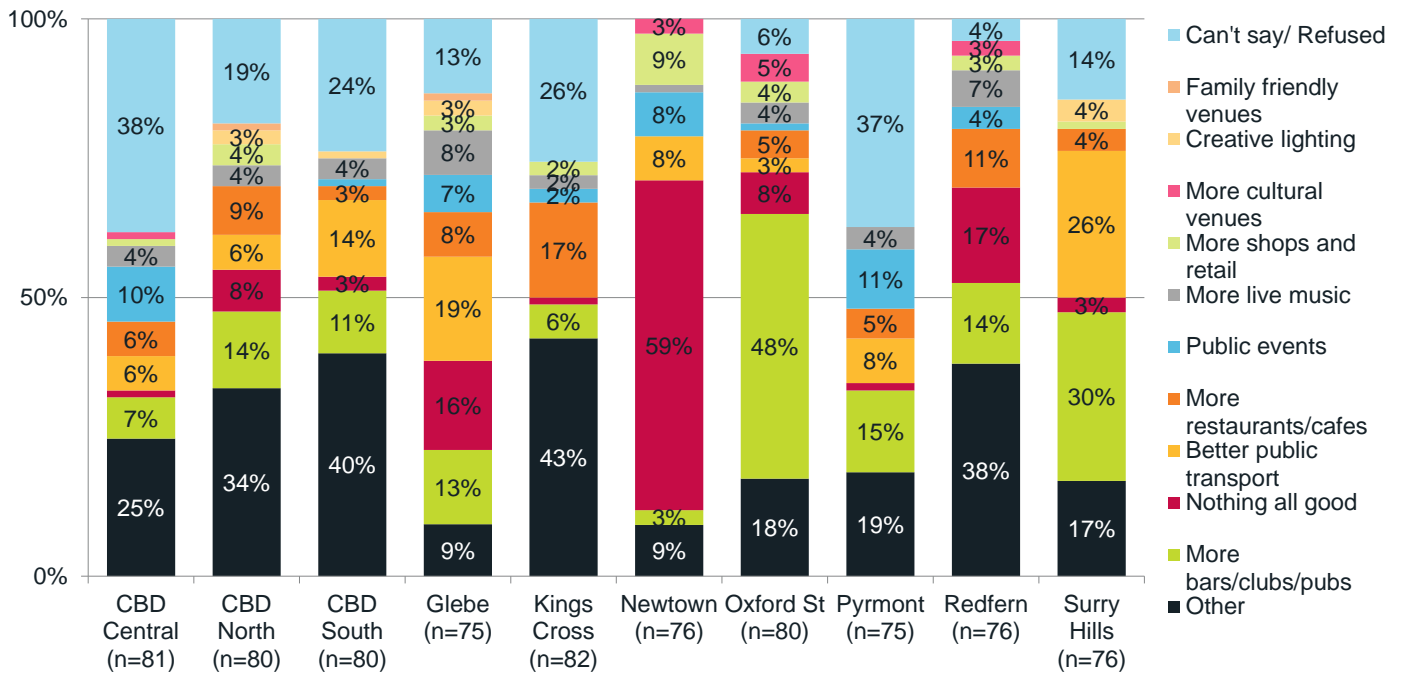


Chart 8.25 – Improvements to the NTE by precinct

## 9. Points to consider

- The City intends to update this research regularly and will incorporate additional data and key literature sources as they become available.

### Points to consider when reading this report

- This report is based on data collected over two periods
  - Friday 13 March and Saturday 21 March 2015 between 5pm and 5am
  - Friday 14 and Saturday 22 December 2012 between 5pm–5am.
- There are a range of definitions of night time precincts – this survey uses the definition of the night time city proposed in the City's *Open Sydney*. This definition encompasses a broader range of times (starting at 6pm, acknowledging post-work and study activities) and environments.
- Pedestrian data was collected at 84 observation points across five Sydney CBD Entertainment Precincts (Central CBD, North CBD, South CBD, Kings Cross and Oxford Street) and five City Village Main Streets (Pyrmont, Newtown, Surry Hills, Redfern and Glebe)
- When drawing comparisons between 2010, 2012 and 2015 intercept survey data, it is important to note that various changes were made in methodology between years a (refer to Section 3. Methodology) – these changes have been taken into account when comparing 2015 results to previous years
- The key objective of this research has been to identify combinations of risk factors which impact on the performance of the NTE. The purpose of this research is to identify the areas of focus for the City's active place management responses, as well as locations where a precautionary approach to the development of the NTE should be applied.

# 10. Further reading

<http://www.ndlerf.gov.au/publications.html>

National Drug and Law Enforcement Research Fund, 2013, Patron Offending and Intoxication in Night Time Entertainment Districts (POINTED): Final Report

National Drug and Law Enforcement Research Fund, 2012, Dealing with alcohol-related harm and the night time economy (DANTE): Final Report

## Other publications

An Evaluation of a Pilot Project that Aims to Reduce Alcohol-Related Violence in the City of Newport – the 'Night Time Economy Project': Final Report to Newport City Council

Brayford J., Deering J., 2008, 'Night Time Economy':

Donnelly, N., Menendez, P., Mahoney, N., 2014, The effect of liquor licence concentrations in local areas on rates of assault in New South Wales, Crime and Justice Bulletin, Number 181, December 2014

Donkin, S., Briks D., 2007, Victims and Offenders of Night time Economy Violence, UCL

Hadfield, P., 2013, 'Safer Public Spaces: Initiatives by Ten European Cities' in French Forum for Urban Security and European Forum for Urban Security (eds.) Safer Drinking Scenes: Alcohol, Cities and Nightlife. Bilingual French/English Version. Paris: EFuS/FFSU

Hadfield, P. and Measham, F., 2011, Last Orders? Alcohol and Law Enforcement in England and Wales: Final Report to the Portman Group. London: The Portman Group

Hadfield, P. and Newton, A., 2010, Alcohol, Crime and Disorder in the Night time Economy. Factsheet. London: Alcohol Concern

Hadfield, P., Noga, H., Large, J. and Jones, R., 2010, Visitor Drinking, Late-Night Refreshment and Transportation in the Camden Special Policy Areas: Final Report to the London Borough of Camden. August 2010. Summarised at pages 78-85 of Camden's Statement of Licensing Policy

Ruston, D., Hadfield, P., and Sanderson, E., 2011, Liverpool City Council Cumulative Impact Policy Consultation. Project Number 11048. Birmingham: M.E.L. Research and Liverpool City Council

Wickman, M., 2012, Alcohol consumption in the night time economy: working paper 55, GLA Economics

## Documents accessible on the City of Sydney website

[www.cityofsydney.nsw.gov.au/sydneyatnight](http://www.cityofsydney.nsw.gov.au/sydneyatnight)

City of Sydney, 2013, OPEN Sydney, Future Directions for Sydney at Night, Strategy and Action Plan 2013 – 2030

City of Sydney, 2013, Late Night Management Areas Research – Phase 3 Report

City of Sydney, 2011, Discussion Paper: OPEN Sydney, Future Directions for Sydney at Night

Parsons-Brinckerhoff, 2011, Late Night Management Areas Research – City of Sydney

Phil Hadfield, 2011, Night Time Economy Management: International Research and Practice. A Review for the City of Sydney

Bevan, T., Turnham, A., Longwood, M & Hadfield P., 2011, Sydney's Night Time Economy: Cost Benefit Analysis. A Report for the City of Sydney Council

## National Drug Law Enforcement Research Fund publications

# 11. Appendix A – Precinct survey maps

Figure A1 – CBD Central Precinct

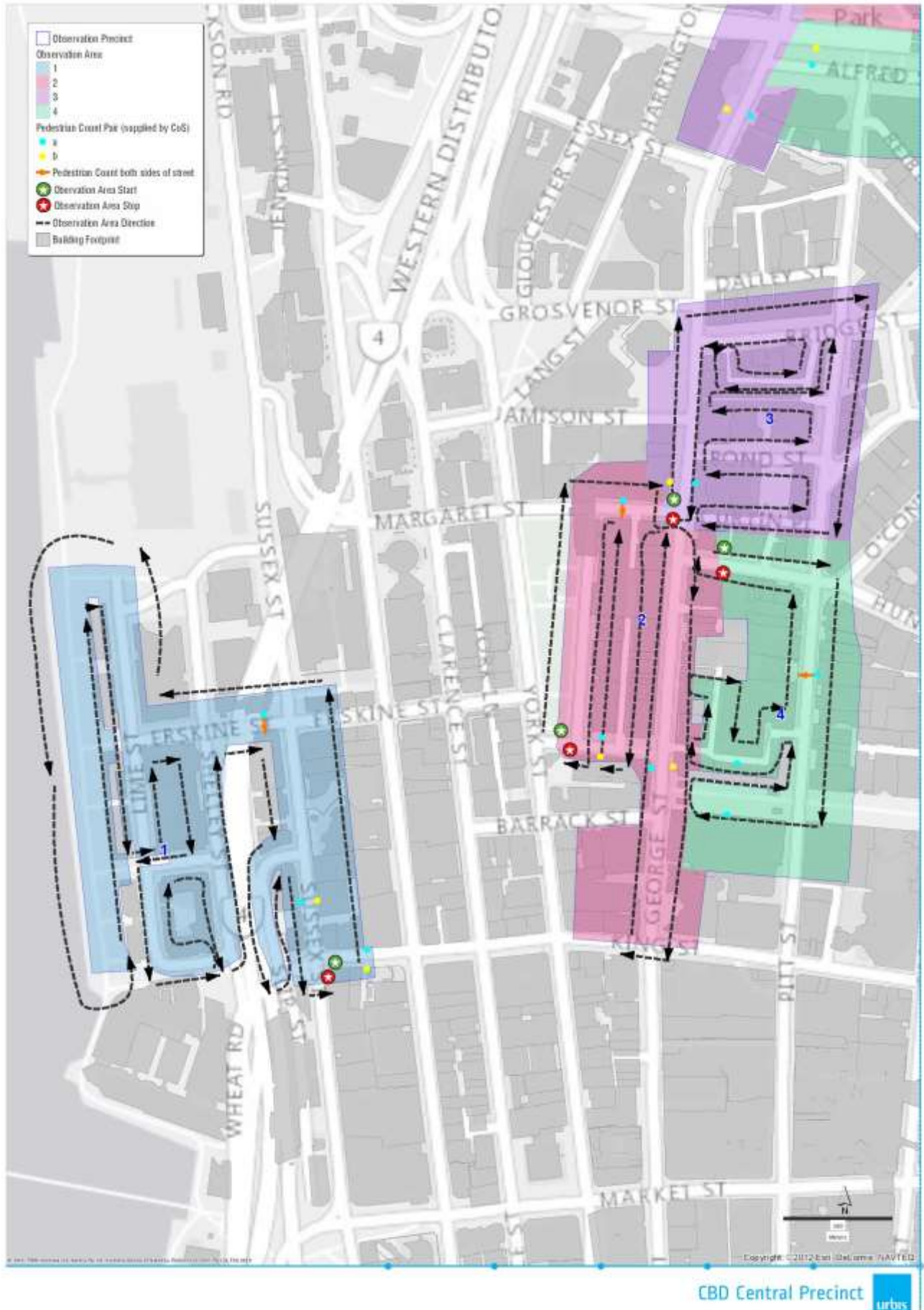


Figure A2 – CBD North Precinct

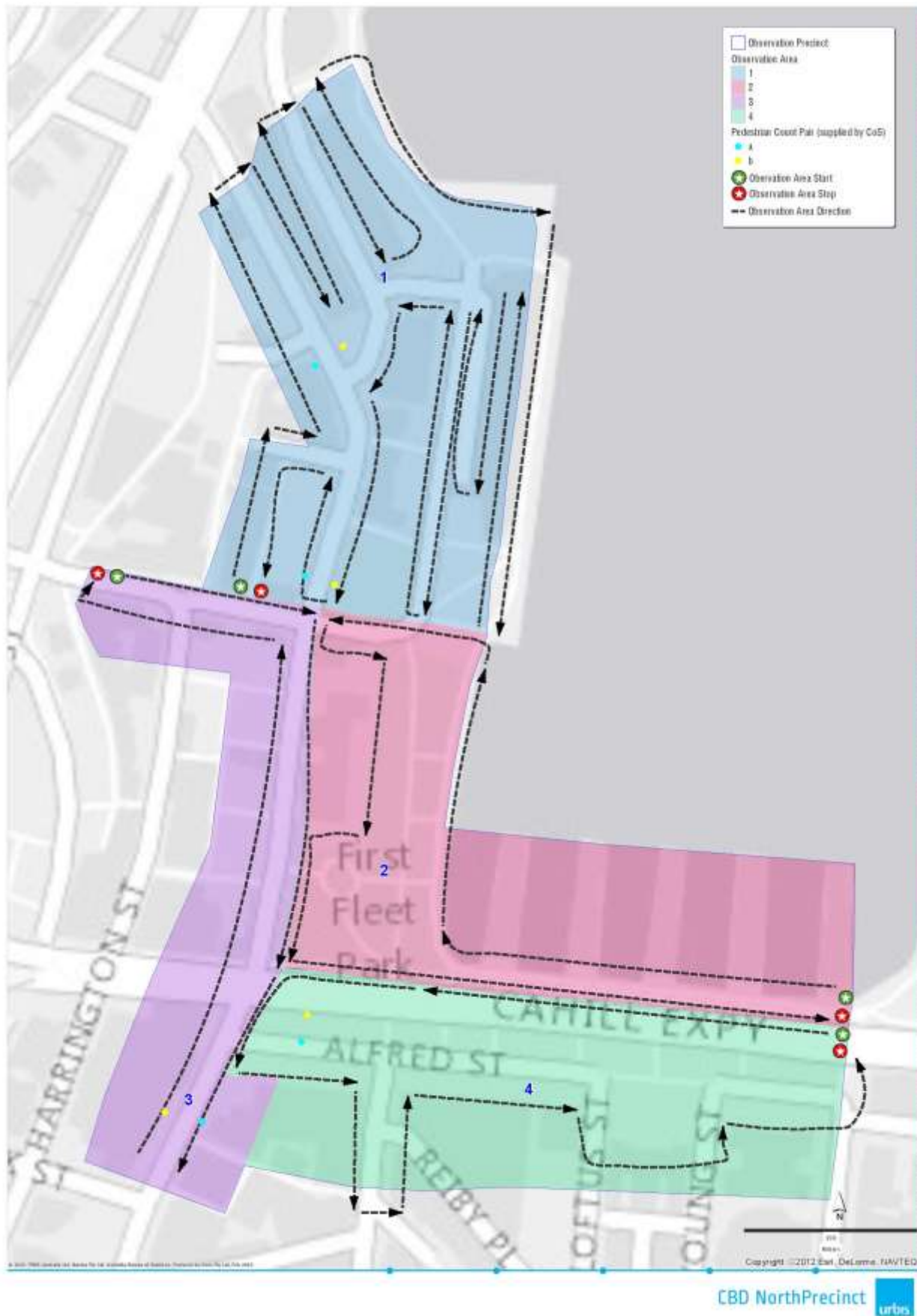




Figure A3 – CBD South Precinct

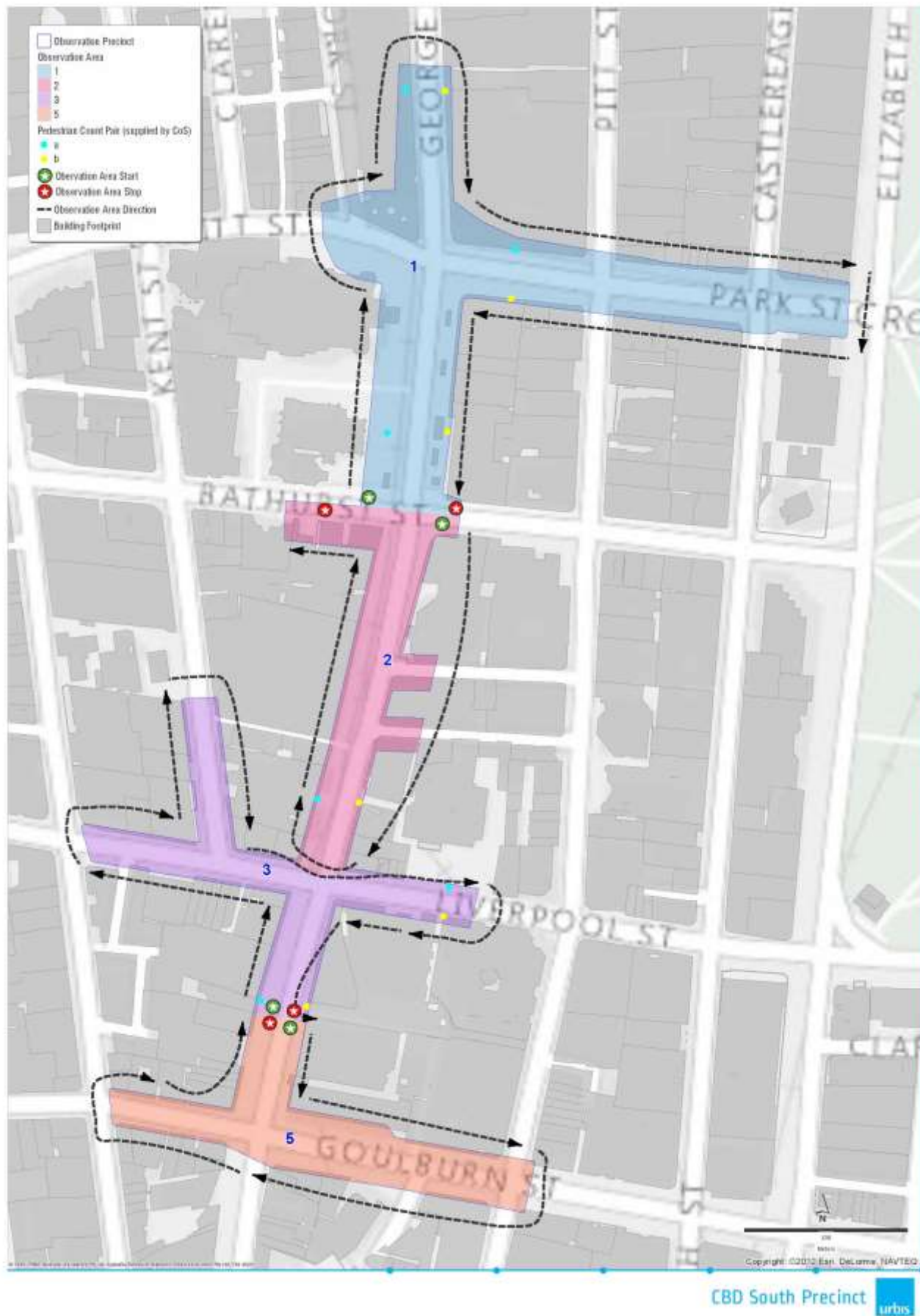
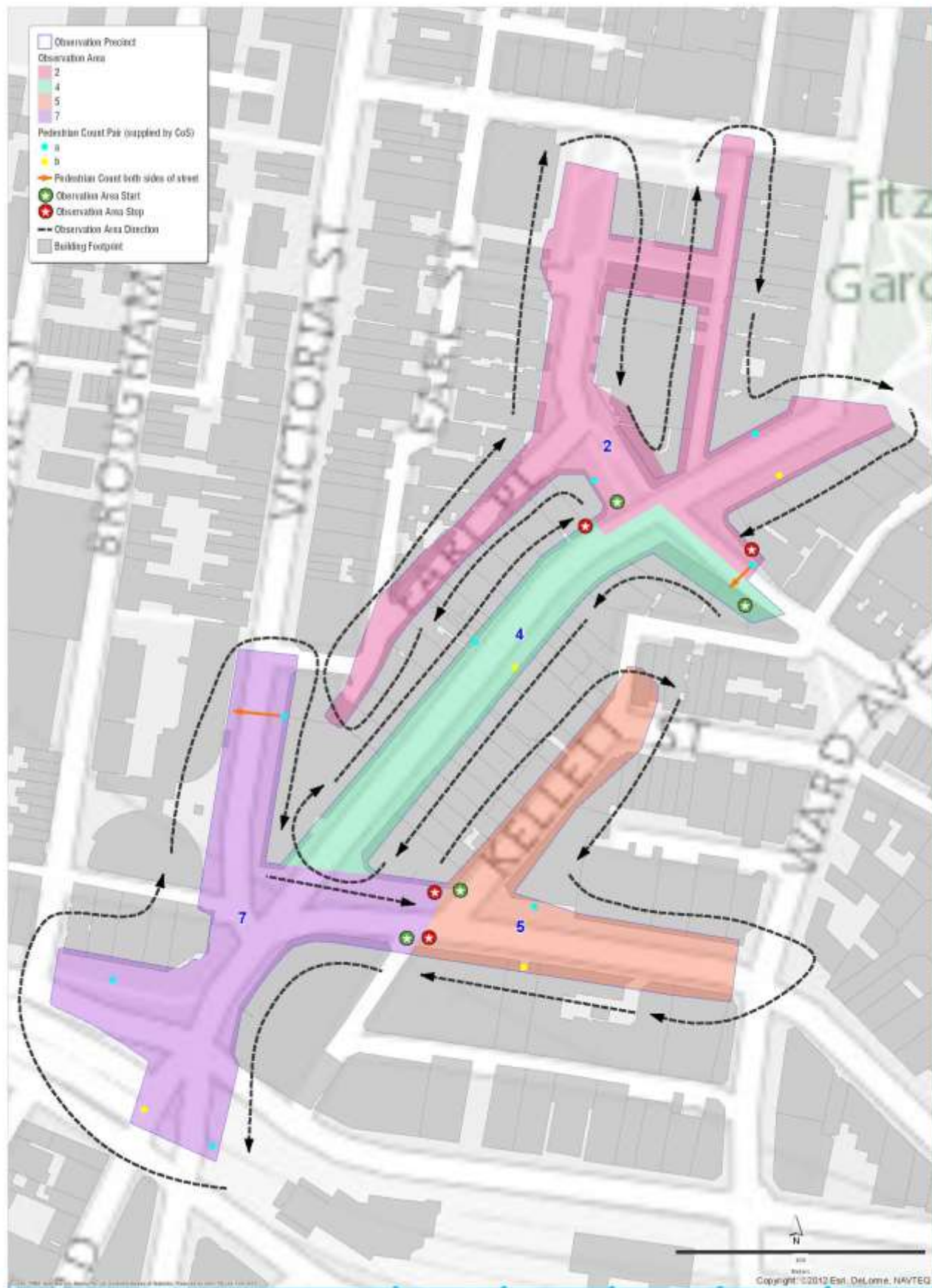


Figure A4 – Kings Cross Precinct



Kings Cross Precinct 

Figure A5 – Oxford Street Precinct

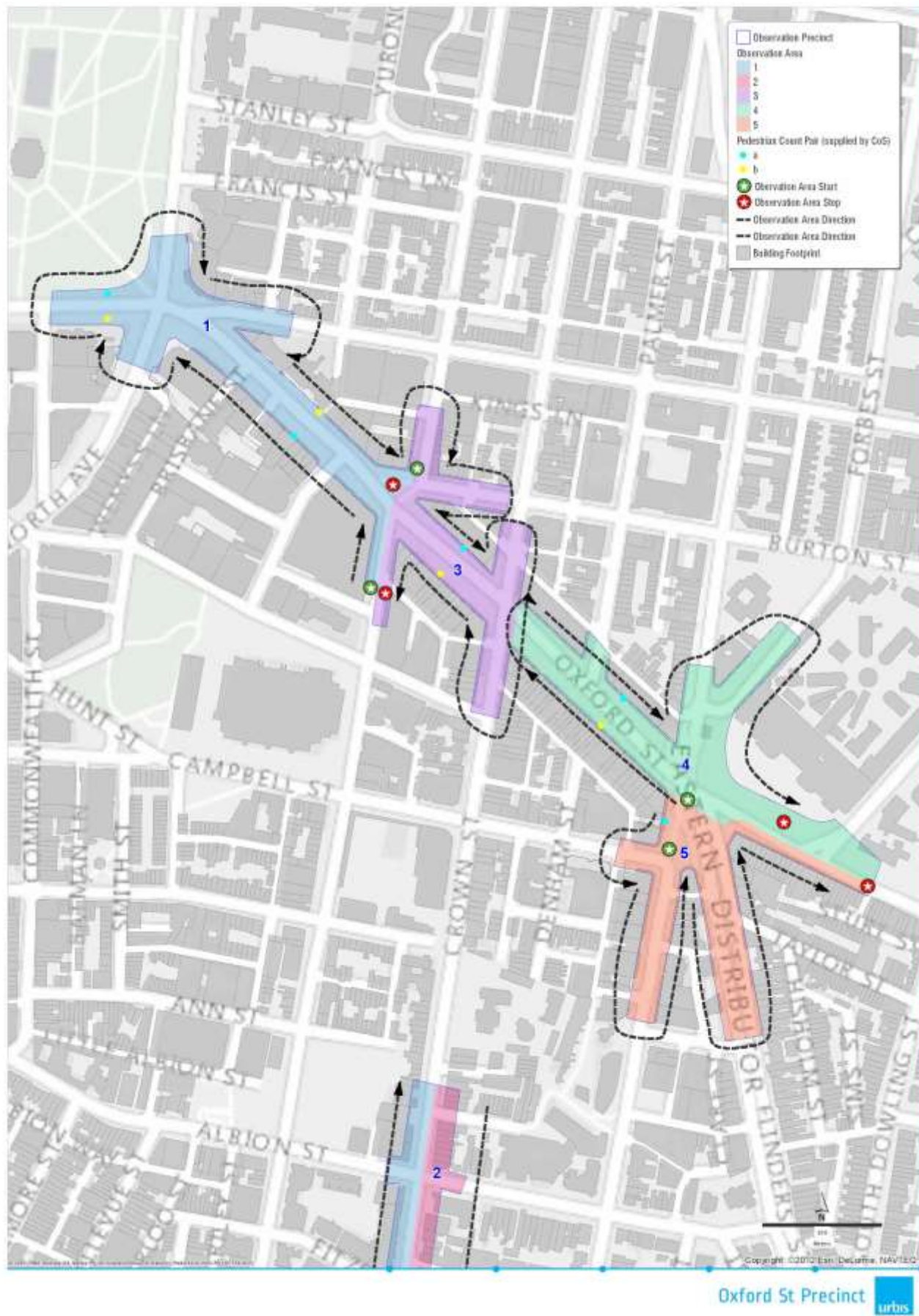


Figure A6 – Pyrmont Precinct

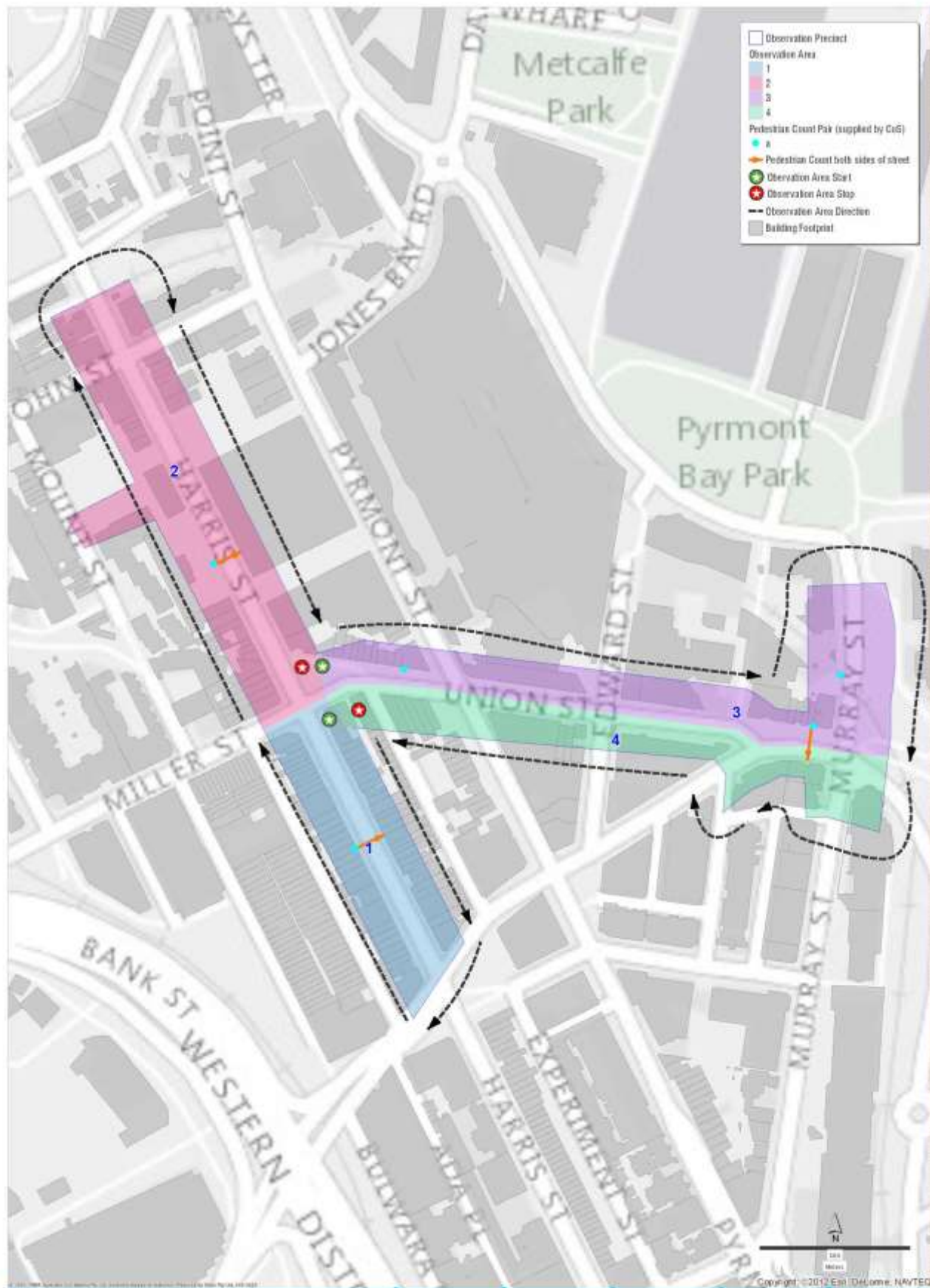


Figure A7 – Newtown Precinct

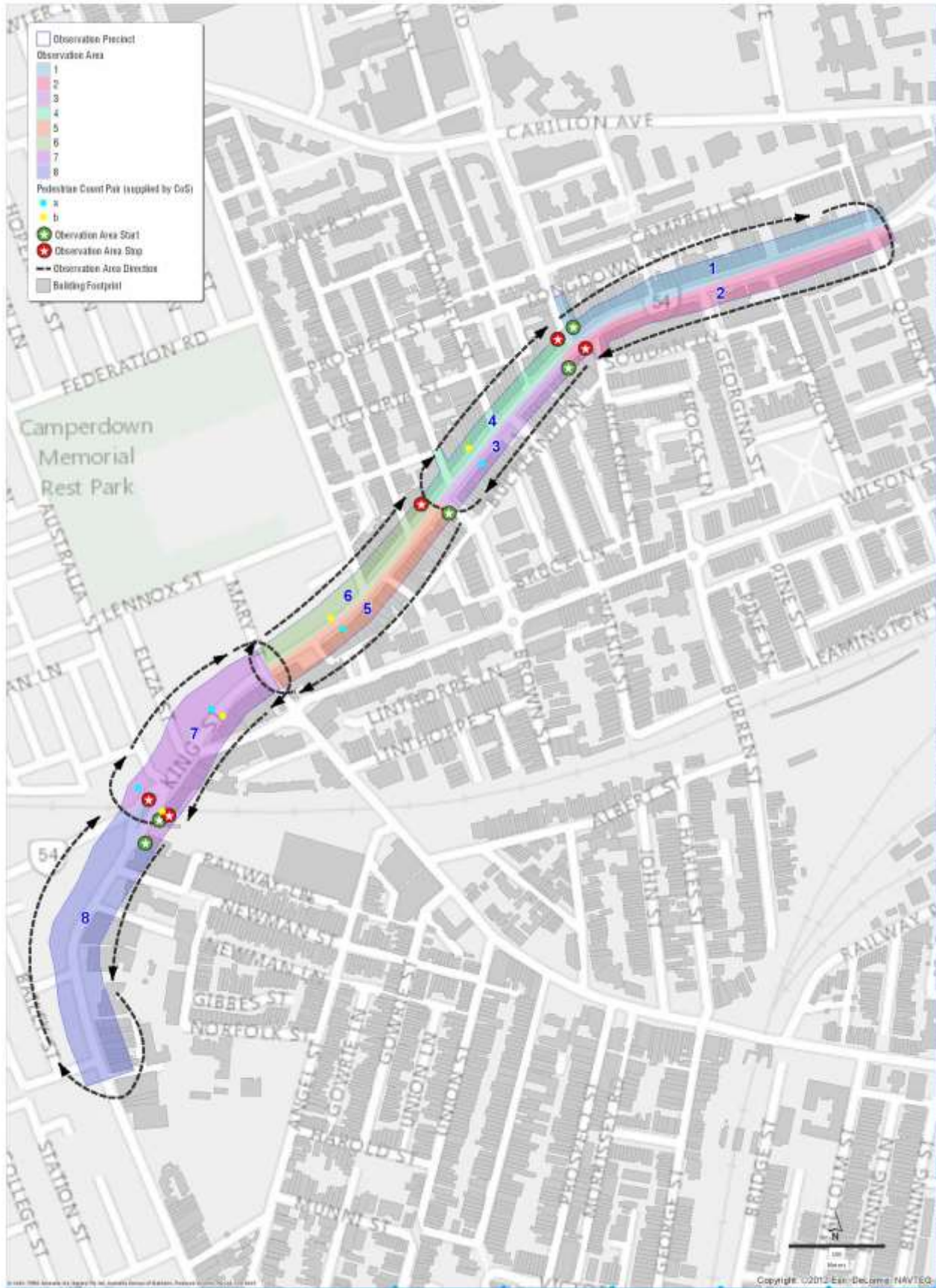


Figure A8 – Surry Hills Precinct

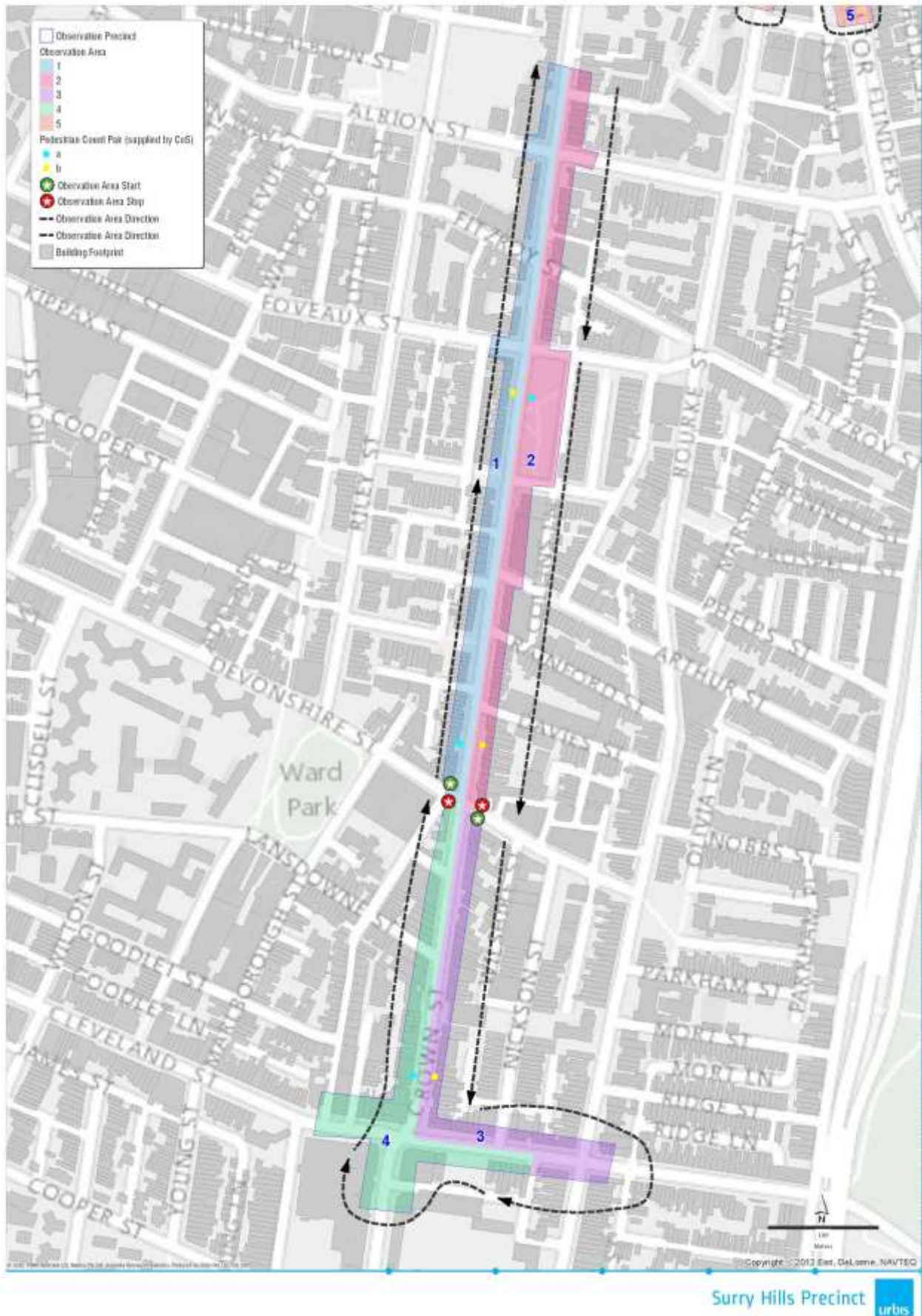


Figure A9 – Redfern Precinct

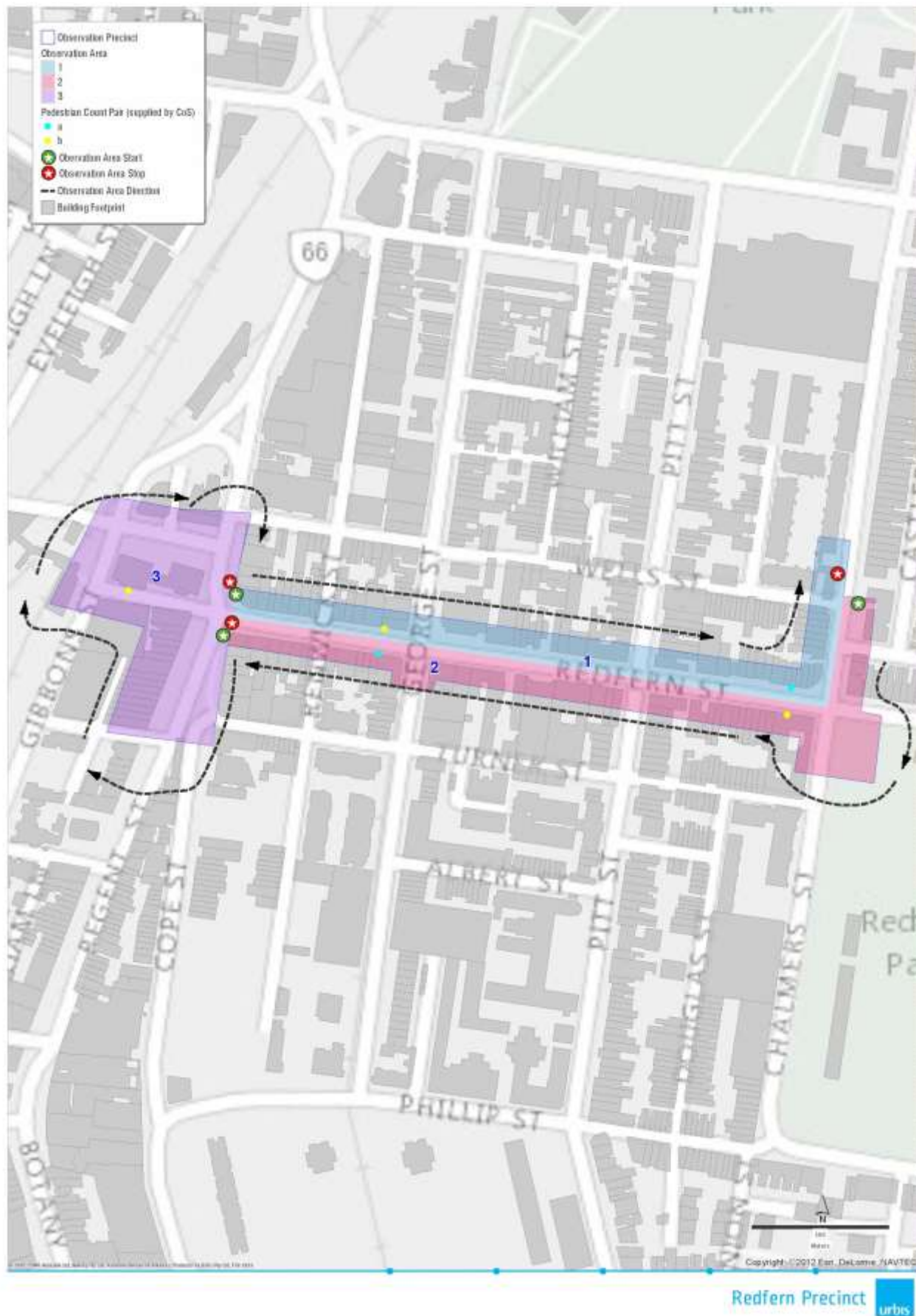
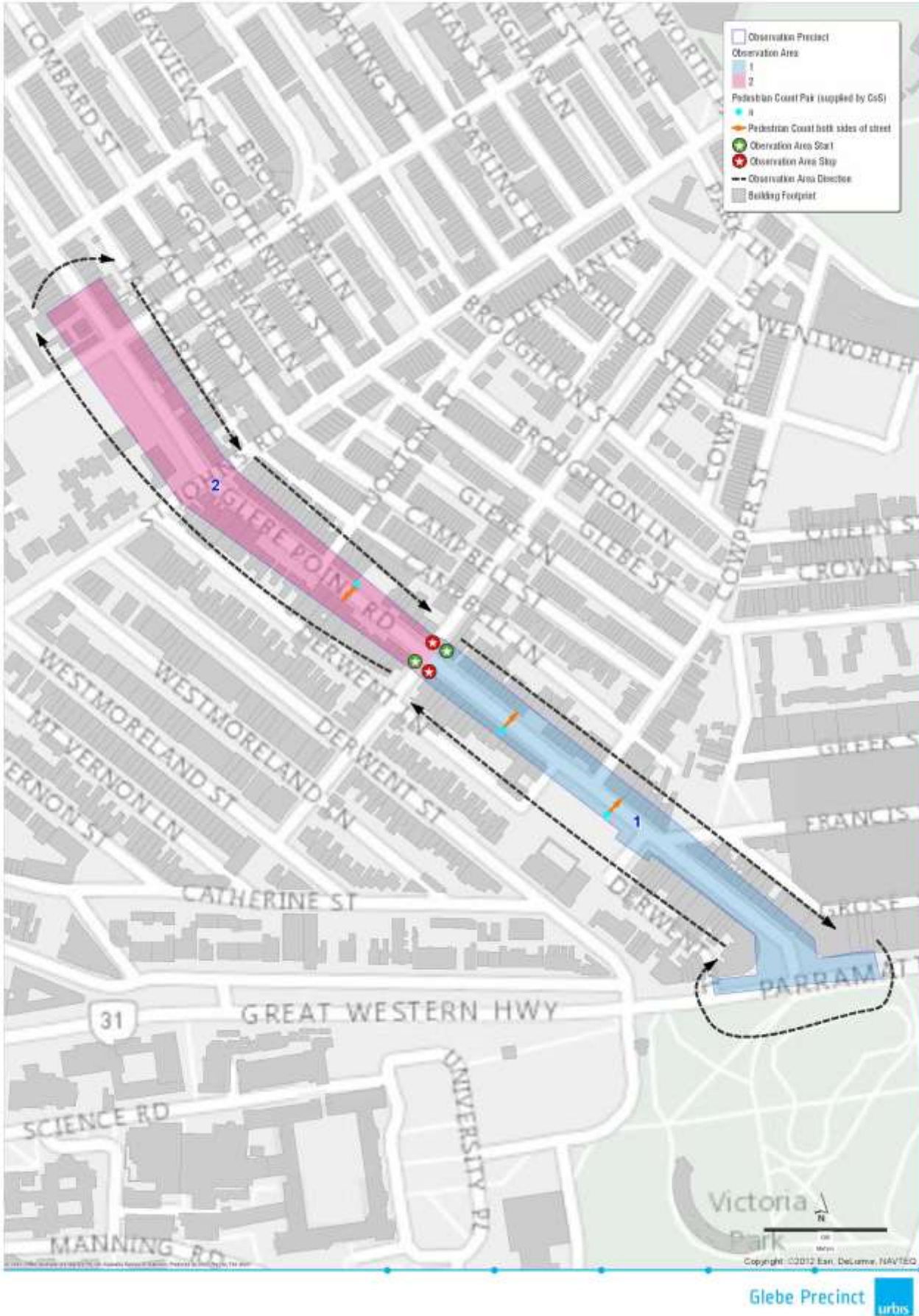


Figure A10 – Glebe Precinct





# 12. Appendix B – Licenced premises and ASB

Figure B1 – Location of ASB incidents and licenced premises Friday

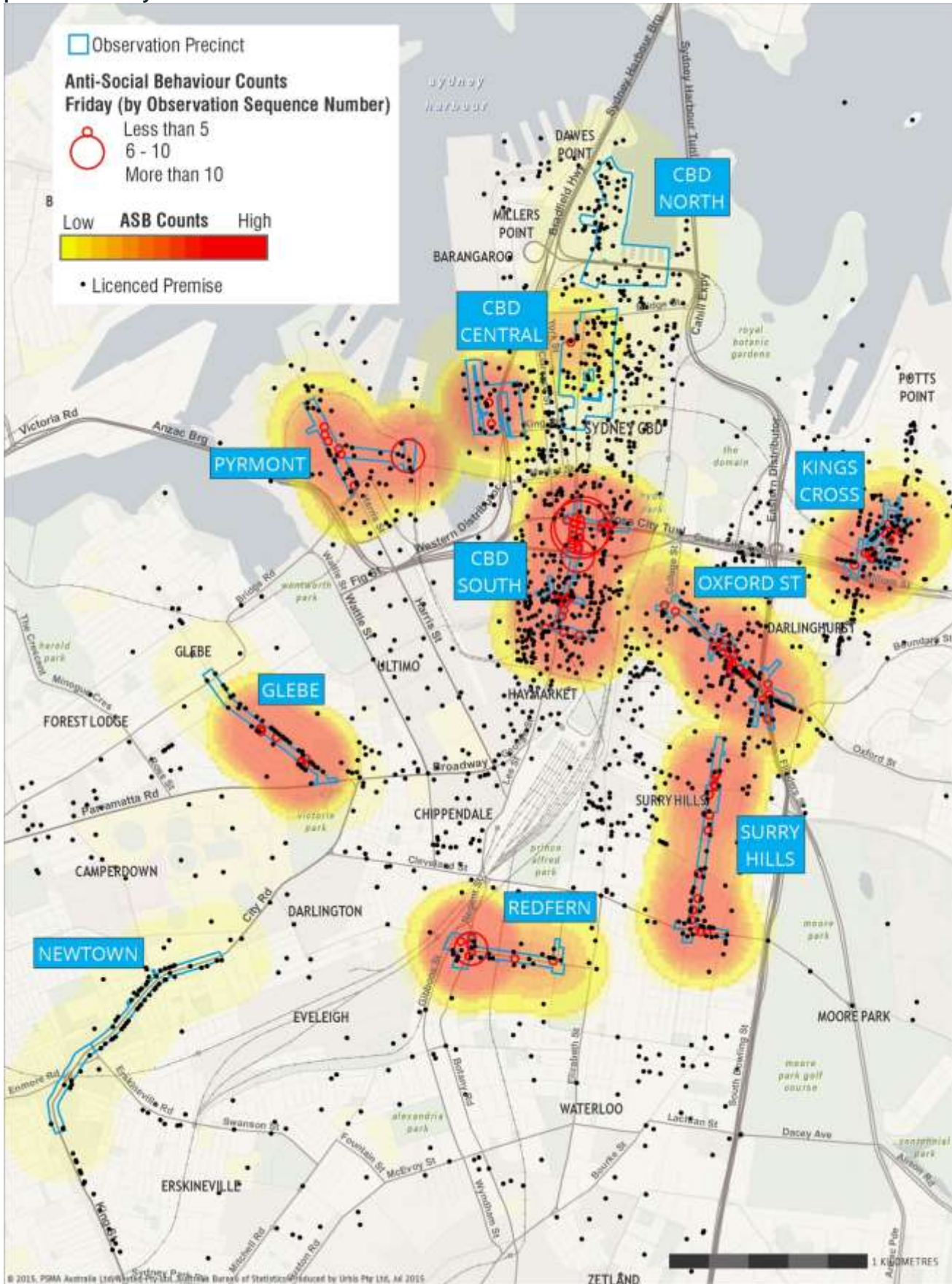
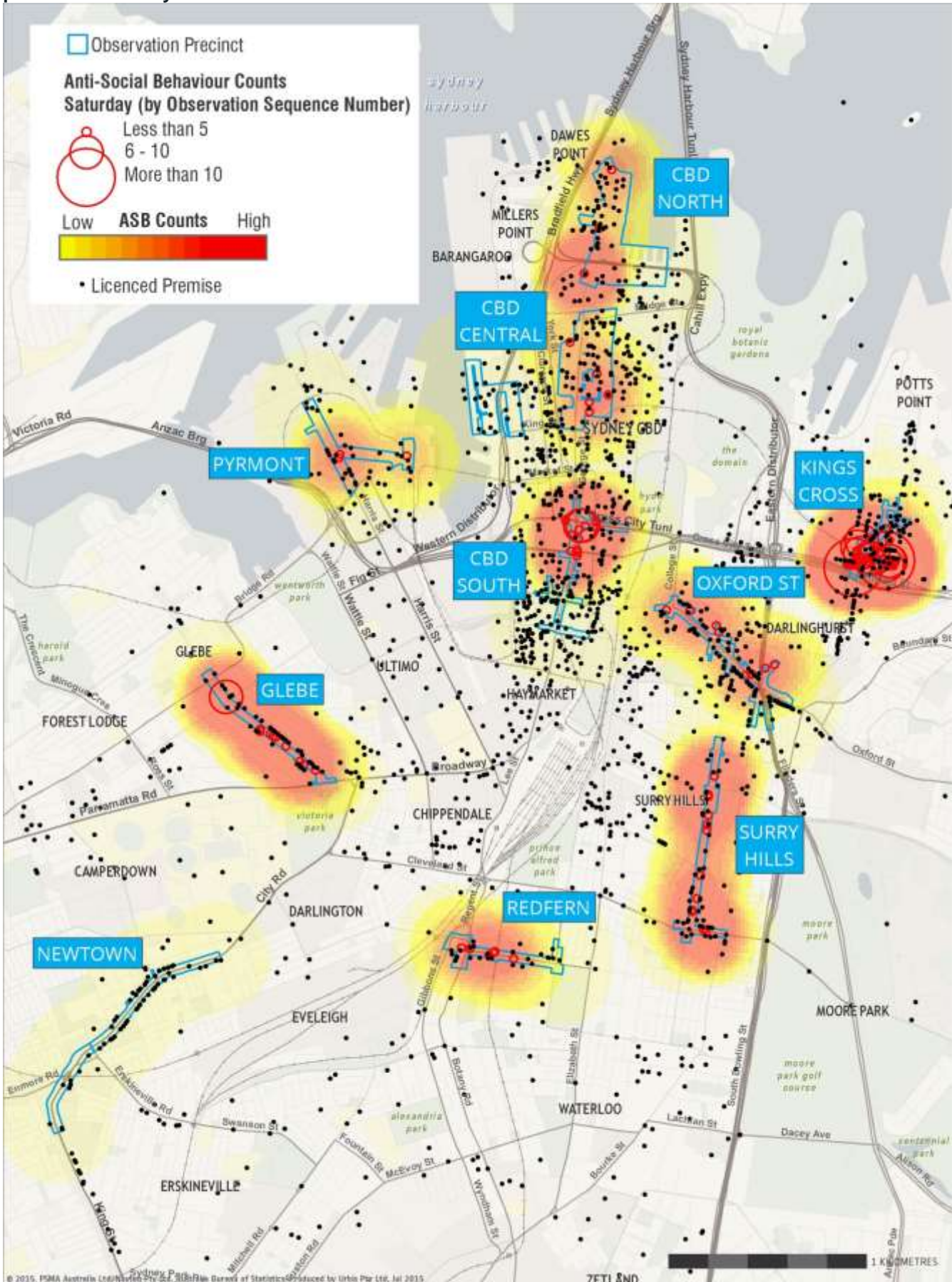


Figure B1 – Location of ASB incidents and licenced premises Saturday



## **SYDNEY**

Level 23, Darling Park Tower 2  
201 Sussex Street  
Sydney, NSW 2000  
t 02 8233 9900  
f 02 8233 9966

## **MELBOURNE**

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t 03 8663 4888  
f 03 8663 4999

## **BRISBANE**

Level 7, 123 Albert Street  
Brisbane, QLD 4000  
t 07 3007 3800  
f 07 3007 3811

## **PERTH**

Level 1, 55 St Georges Terrace  
Perth, WA 6000  
t 08 9346 0500  
f 08 9221 1779