

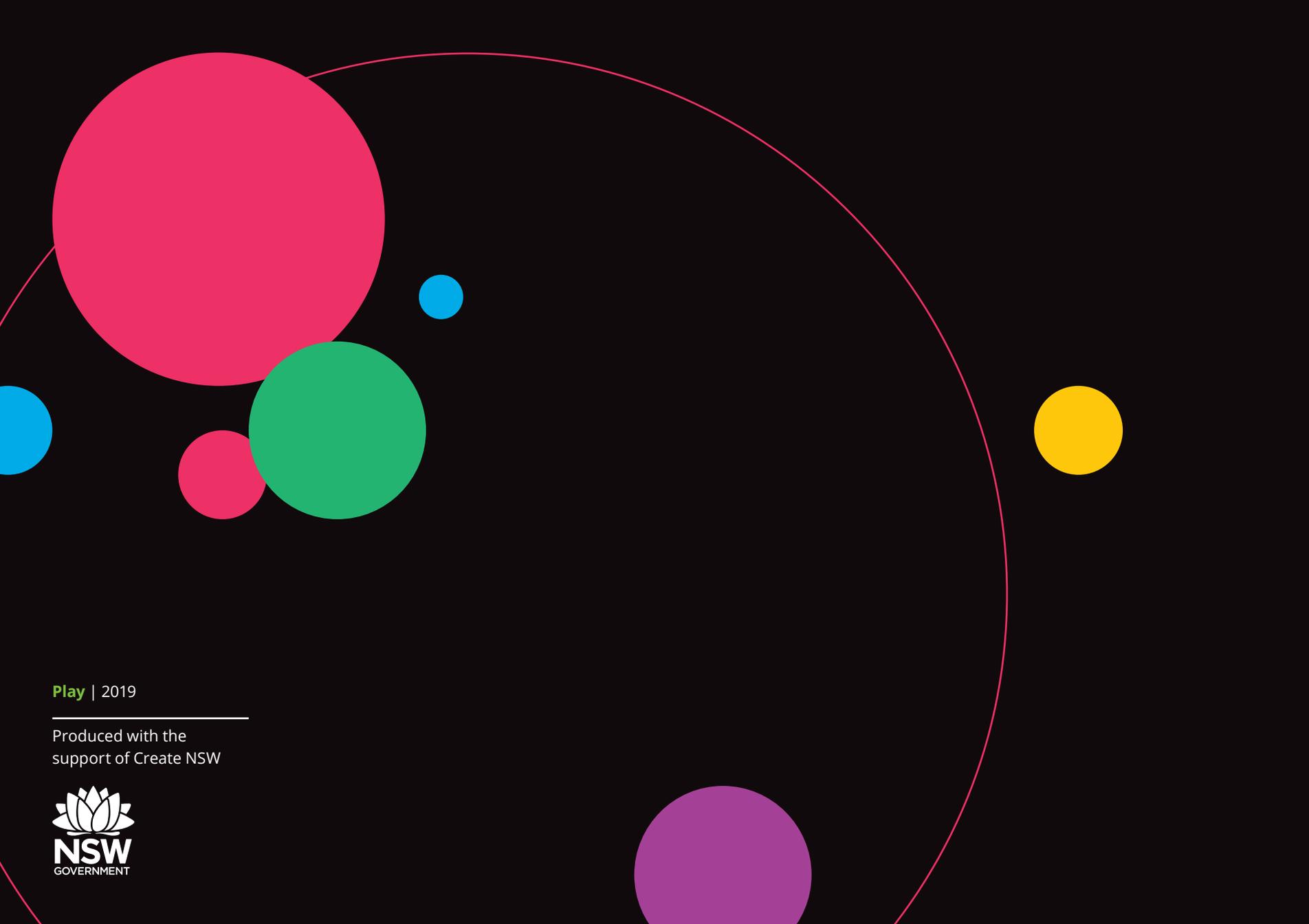
ImagineSydney

Play | 2019



Deloitte.

*Shaping
Future Cities*



Play | 2019

Produced with the
support of Create NSW



There's something about Sydney

What makes a city a desirable place to live?

There is the obvious list; good employment prospects, affordable housing, safe spaces, reliable transport, accessibility and opportunity. These fundamentals however, don't paint the full picture of why some global cities cultivate a reputation for simply being wonderful to live in. Every city has a vibe, a feeling, something you can't quite put your finger on, but that you know is important to you. It makes it hard to leave, uplifting to come home to and gives a sense of pride in being a part of it. That elusive 'something' is what makes people want to visit, study, work and socialise. This is the spirit of 'play'.

Sydney has been gifted with significant natural advantage. Our beautiful harbour city, with glittering blue water views around every corner and abundant outdoor spaces, bestows privilege in terms of location, weather and natural resources.

On paper, these conditions should have cemented our reputation as the best city in the world in which to play. Yet we have not yet taken our place at the top of the list of best cities in the world. Is that because we have allowed our natural advantages to give us a sense of complacency? Do we take what's on our door step for granted and allow the spotlight to be shone on London, New York, Venice ... or even Melbourne? Or have we simply not communicated effectively enough, the importance of and value we place on Sydney being a vibrant and thriving city that people want to work, live and play in?

Deloitte's *ImagineSydney* series sets out to contribute to the conversation around how we can create smart, flourishing and productive communities through exploring strategies that will drive economic and social development in Sydney. In our third edition, *ImagineSydney: Play* developed with the support of Create NSW, we set out to uncover what makes Sydney a complete city, full of buzz and excitement. We explore the value of play to our economy and provide ideas for how government, business and individuals can continue to contribute to, and benefit from, participation in 'play'.

But how we feel about this city doesn't just come down to putting a number on it or a ranking on a suburb.

Looking at our city through the lenses of the arts and culture sector, the night time economy and sports and recreation, we're out to prove that there is nowhere else quite like Sydney in the world... and definitely nowhere better to play.

The arts and culture in our city, the energy of the streets at night time, inspiration from food, experiences, live events, sport, the opportunities to get outdoors and interact with nature; these add technicolour to our lives and are the essential building blocks of creating a great place to live.

So what are you waiting for – come out to play!



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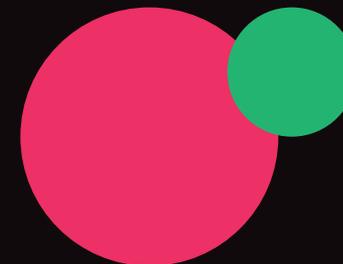
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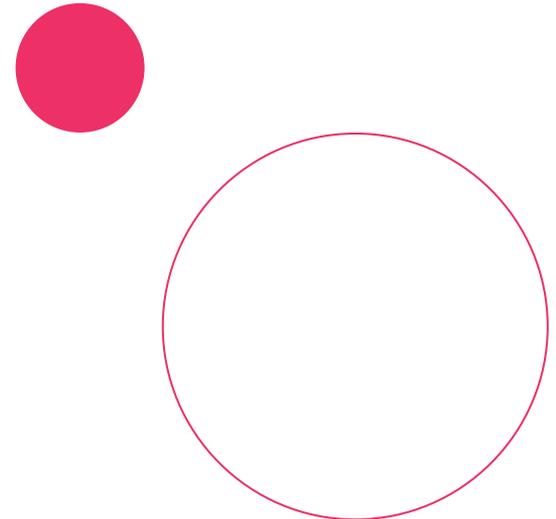
Chapter 1 — Arts and culture

Getting to the art of the matter

Sydney is one of the world's most iconic cities for many reasons. However, despite the fact that our most famous urban icon is an opera venue, the strength of our arts and culture sector has never been one of our traditional drawcards. In fact the perception has long been that we're 'just not that into' arts and culture, driven by an assumption (presumably) that our free time is spent at the beach, rather than in a museum, gallery or theatre.

In fact, Sydney residents enthusiastically participate in a wide variety of artistic and cultural activities.¹ They also understand the importance of a thriving, creative community, and the benefits – economic, social and cultural – that this brings to our city.

From fostering community links, to shaping local identity and providing a source of pride, Sydneysiders perceive the arts and culture sector to be an integral, essential ingredient of a thriving, creative, global city.



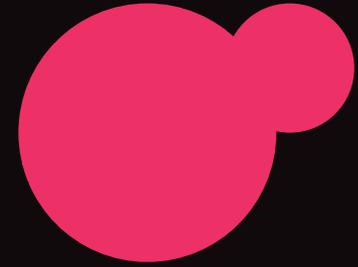
Adding up the arts

The total economic visitation value of cultural events and institutions in NSW is **\$1.4 billion** per annum

Sydney has over **3,100** cultural assets right now

Sydney employs **46,640** people in the arts and cultural sector – the highest proportion across Australian capital cities

75% of all Sydneysiders participate in some form of arts and culture activities



Understanding the true value of arts and culture

In our research, we defined 'arts and culture' as:

- *Fine arts and culture* – art that is developed by professionals for aesthetic value, such as paintings, sculpture, poetry, literature and theatre.
- *Individual arts and culture* – art that anyone can engage in to express themselves, such as choirs, art classes, or dance workshops.
- *Community arts and cultural development* – professionals and individuals working collaboratively to reveal their artistic and cultural expression. This includes festivals, public art and digital experiences.

Source: Australia Council of the Arts 2017

Among our survey respondents, 38% identify 'arts and culture' as either fine arts, community arts and cultural development or individual participation in the arts, 17% identify two of these categories and 45% consider it to be mix of all three.

Sydneysiders attach value to arts and culture, both in sentiment towards it and their support of various types of cultural activities.

Over half of survey respondents profess to 'love or like' the arts and a further 26% are happy to go along to arts and culture events if friends are going.²

Survey respondents identified the following as being the main ways in which arts and culture bring value to Sydney (*proportion agreeing or strongly agreeing*):

- Supporting the creative industries and those who work in them, as well as local businesses (75%)
- Fostering community links and contributing to social inclusion by providing an understanding of other people and cultures (71%)
- Shaping local identity and allowing individuals to express themselves (71%)
- Preserving cultural heritage, history and identity and contributing to Sydney's image and brand (76%)
- Providing a source of pride when local art or artists receive international recognition (74%)
- Bringing together multidisciplinary people and ideas and providing resources for research and education (69%)
- Providing creative and collaborative spaces (72%)
- Increasing wellbeing and happiness in individuals and communities (69%).

"Sydney people [are] very open minded and curious. I feel Sydney welcomes you to have a go."

Liz Ann Macgregor OBE
Director of the Museum of Contemporary Art

A helping Handa for the economy

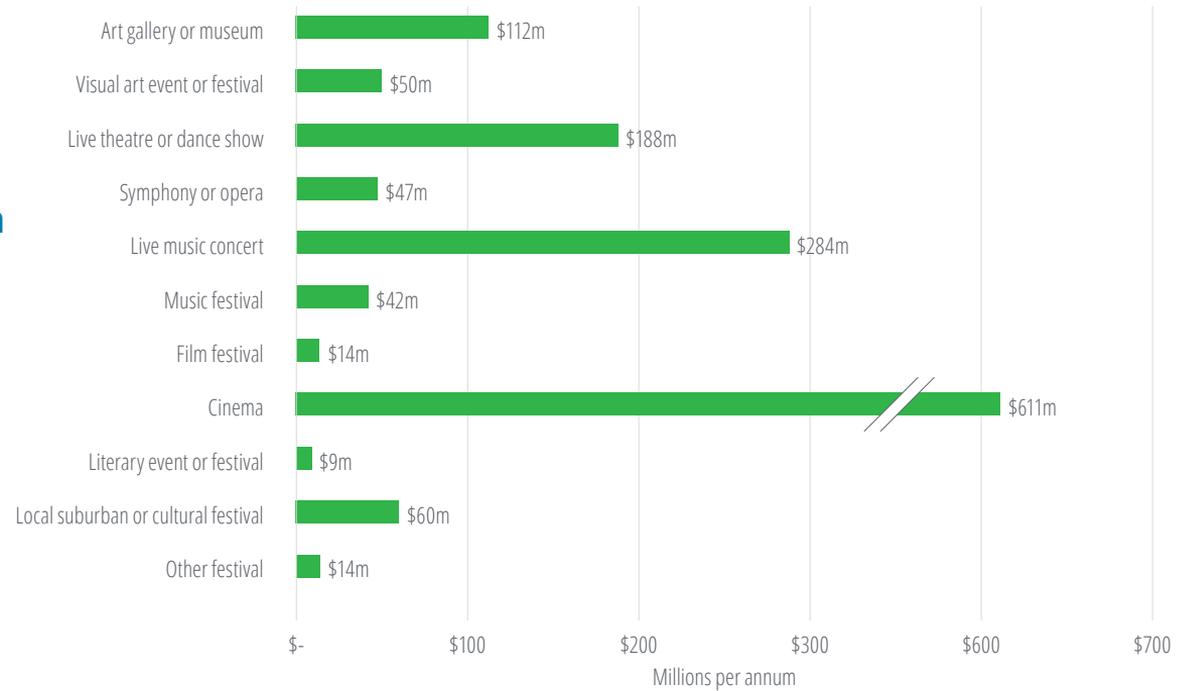
Handa Opera on Sydney Harbour is now a key cultural event on the city's calendar, and it's not just for opera aficionados – around 40% of attendees have never been to the opera before, and come for the unique opportunity to experience opera against the backdrop of Sydney Harbour. Since its inception, Handa Opera has attracted more than 330,000 attendees from around Australia and across the globe. This has included more than 63,000 overnight visitors, generating more than \$55 million in visitor spend for NSW.

Source: Destination NSW



There are significant economic benefits and advantages to business and tourism to be gained from having a vibrant arts and culture scene. The **total economic visitation value** of cultural events and institutions in NSW is **\$1.4 billion** per annum.

Figure 1: Economic visitation value, Sydney 2018



Beyond attending arts and cultural events and destinations, there are also benefits to those individuals who don't necessarily engage directly with arts or culture. In calculating the value of cultural events and institutions³ to broader society, we define this as existence value, including the option to attend or participate in arts and culture in the future, as well as broader benefits, such as preserving cultural heritage, history and identity and contributing to Sydney's image and brand.

The total estimated value of cultural events and institutions in Sydney to **broader society** is **\$373 million** per annum.



Creating a city of culture

Recognising the sector's critical importance, Create NSW was established by the State Government in early 2017 to support arts and culture within NSW by investing in the success and future of the sector. The Government also acknowledges the need for cultural infrastructure to support the development of arts industries and have made the following commitments, which will amount to more than \$1bn in the coming years:⁴

- Western Sydney: Parramatta Cultural Precinct
- Art Gallery of NSW expansion: Sydney Modern Project
- Sydney Opera House Stage One Renewal and Joan Sutherland Theatre Upgrade
- Relocation of the Powerhouse Museum
- Walsh Bay Arts and Cultural Precinct.



Image of the Sydney Modern Project as produced by Kazuyo Sejima + Ryue Nishizawa / SANAA © Art Gallery of New South Wales, 2019. Featuring artworks left to right: Reko Rennie, *Murri Totems*, 2013 © Reko Rennie, courtesy of the artist and Blackartprojects; Clement Meadmore, *Flippant Fury*, 1977–1978 © Clement Meadmore/ARS. Licensed by Copyright Agency; Guan Wei, *Revisionary*, 1998 © Guan Wei; Kimssooja, *Archive of mind*, 2017 © Kimssooja; Rosalie Gascoigne, *Metropolis*, 1999 © Rosalie Gascoigne. Licensed by Copyright Agency; Sir Richard Long, *Southern gravity*, 2011 © Richard Long; Imants Tillers, *Counting: one, two, three*, 1988 © Imants Tillers.

Putting arts and culture to work: *Employment*

46,640 people are employed in the arts and cultural industries in Greater Sydney. The largest employment sub-sector is media production and broadcasting (36%) followed by music, performing and visual arts (20%).

Figure 2: Arts and culture employment share by category



- Music, performing and visual arts (20%)
- Libraries, archives and museums (7%)
- Publishing (2%)
- Media production and broadcasting (36%)
- Internet and digital services (3%)
- Design (23%)
- Arts education (10%)

For context, creative industries directly employ almost 148,000 people in NSW and account for 6.8% of NSW's total services exports, worth around \$1.38 billion.

As compared to other metropolitan centres in Australia, Sydney has the largest proportion of people employed in arts and culture associated work (2.24% of total people employed compared to only 1.76% in Melbourne and fewer in Brisbane, Adelaide and Perth). Within the sector, the largest categories of employment in Sydney are media production and broadcasting followed by music, performing and visual arts and design.



Sail value

Having first valued the economic contribution of the Sydney Opera House in 2013, Deloitte again assessed the value of the icon in 2018. 2.9 million international tourists visited Sydney Opera House during 2016–17 and 93% of international visitors to Sydney said the Opera House was a consideration in their decision to visit Sydney. Its social asset value is \$6.2 billion which represents a 24% increase in value since 2013. The economic contribution of the Sydney Opera House is \$1.2 billion (up 44% since 2013) and it supports employment for 8,698 full time equivalents (FTEs).⁵

Where we get our arts and culture: *Infrastructure and assets*

Sydney has over 3,100 cultural infrastructure assets that support a vibrant creative industry.

These assets include buildings and spaces that support the creative development of the arts, including community and cultural centres, production studios, and writers' centres. Cultural infrastructure also includes settings where art and culture is exhibited or performed, including museums, art galleries, live music venues, and theatres.

Integrally linked to infrastructure assets are a number of organisations that provide services to individuals and groups working within the arts and cultural industry. The role of these organisations includes supporting the development of the arts and connecting with audiences to provide access and promote engagement. While infrastructure provides more of the enabling services, these organisations provide the support services.

These infrastructure assets and organisations are distributed widely across the Greater Sydney region, but Eastern Sydney sees a greater concentration of nine out of the 16 cultural asset types identified, particularly Aboriginal cultural centres, galleries, screen production organisation, theatres and writers' centres.

Table 1:
Number of arts and cultural infrastructure assets and organisations by type and by city region

	Eastern Harbour City	Central River City	Western Parklands City
Aboriginal Cultural Centre	14	–	2
Arena	1	1	–
Arts centre	15	5	5
Cinema	40	9	11
Community Centre / Venue	101	102	134
Conservatorium	4	–	1
Gallery	290	14	66
Library	145	36	36
Licensed Venue	566	80	86
Museum	155	45	52
Outdoor	6	3	1
Screen Production	124	5	2
Studio	703	102	99
Theatre	68	9	6
Writers' centre	5	–	–
Radio Broadcasting	30	4	4
Grand Total	2267	415	505

In fact, of the 3,187 arts and culture infrastructure assets and organisations in Greater Sydney, 71% are located within the Eastern Harbour City and are tightly clustered around the CBD and inner city suburbs. The Central River City and the Western Parklands City both host a similar number of assets and organisations, at 415 and 505 respectively, each representing approximately 15% of the total number in Greater Sydney. While these regions have fewer venues compared to Eastern Sydney, they have responded by celebrating their own cultural attributes through festivals, popular music, and other unique artistic expressions. Nevertheless, investment in arts and culture should be recognised as priority within these areas to bring the number of offerings available to a level more comparable with those located in the east.⁶

Calculating creativity

In 2017, the Boston Consulting Group developed a performance index for cities as global cultural and creative destinations. In this index, the top cultural and creative cities in the world are London, Paris and New York. Melbourne is the highest ranking city in Australia on this index (12th), followed by Sydney (16th).

This index considers six dimensions, including whether:

- Cultural and creative people want to study and work here
- Cultural and creative sectors are supported
- The city offers quality cultural and creative experiences
- Consumers are aware of these experiences
- The broader city is attractive
- The sector is well governed.

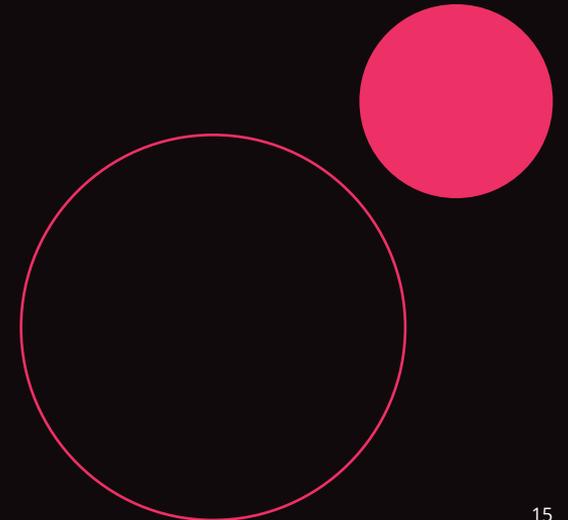
Competition between cities ranked 4th to 15th is high – with only six points out of a total of 60 differentiating cities in this ranking. Sydney is perceived by international visitors to be a more creative city than Melbourne, but the majority of locals rank Melbourne ahead of Sydney.

Source: Boston Consulting Group, 2017



Domestic visitors think Melbourne is the most creative Asia Pacific city (38%, ahead of 28% for Sydney) but international visitors think Sydney is the most creative city (34% versus 23% for Melbourne).

Global Traveller Survey, 2016

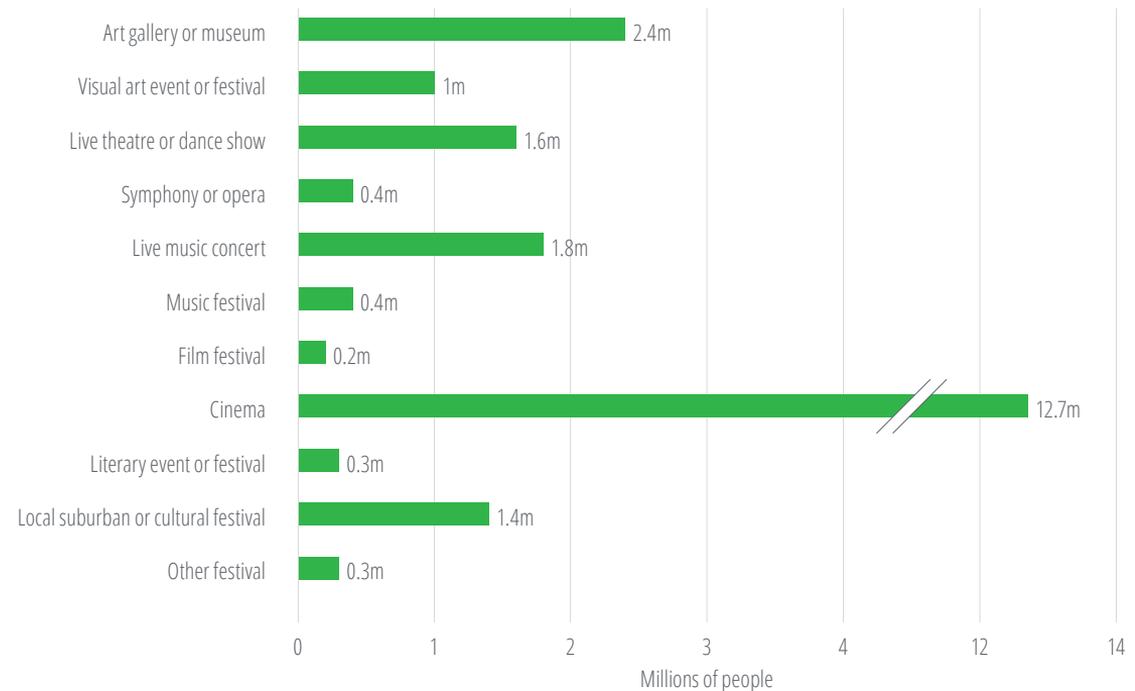


How we like to play: *Participation*

The most attended art and cultural activity or venue was the cinema, followed by art galleries and museums, live theatre and live music and local cultural festivals and events.

For those who were interested in attending events, the key barriers to/reasons for not attending, include the cost of the event (17%) and accessibility – being too far away (11%). Accessibility as an issue was 3% higher for people in the Western Parklands City where a significantly lower number of arts and cultural assets and organisations are located than the Eastern Harbour City.

Figure 3: What type of arts and culture activities or venue do you attend most often?



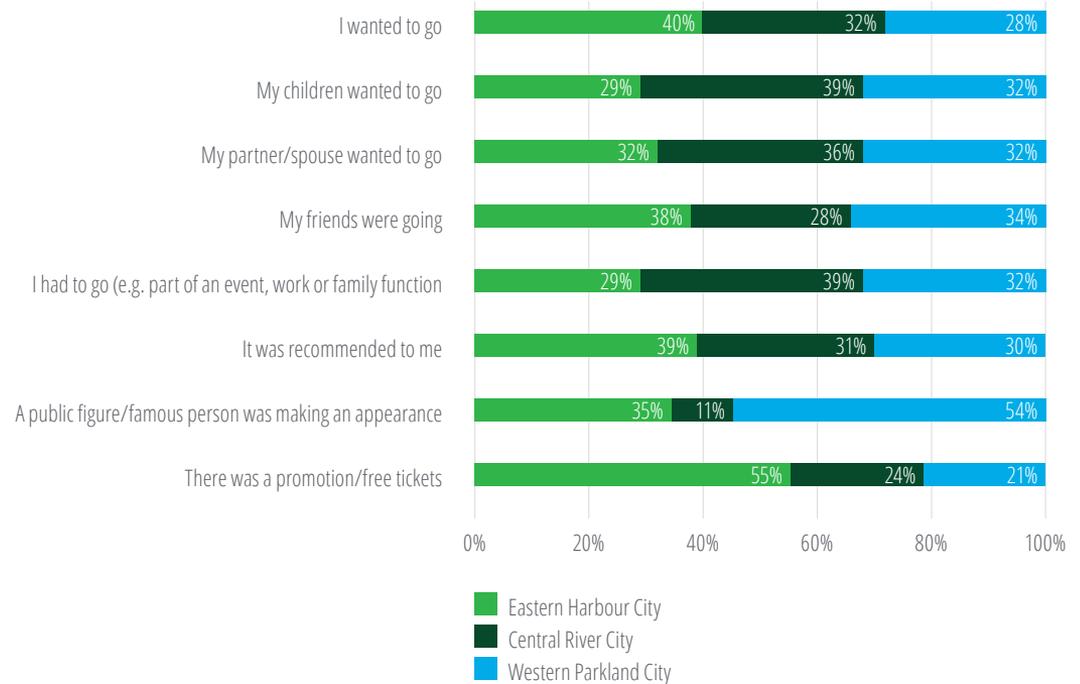
Golden ticket

In 2019, Sydney is hosting the Australian premiere of the Charlie and the Chocolate Factory musical. Musical theatre is extremely popular and in many cases, first run musicals like this can drive even more visitors to Sydney than major sporting events. Tickets sales have been strong, and Destination NSW expects that more than 76,000 overnight visitors will travel to Sydney to attend, generating an estimated \$37 million in visitor spend.

Source: Destination NSW

Reasons for Sydneysiders attending arts and culture events are broadly similar across all three Sydney centres, although promotions or free events are a more commonly cited reason for attending in the Eastern Harbour City, children wanting to attend is more commonly cited in the Central River City area and the appearance of a public figure motivates Western Parklands City residents.

Figure 4: Reason for attending arts and culture events



Imagine the future for arts and culture in Sydney

The arts and culture sector is a vital component of what makes Sydney a thriving city, contributing through creating jobs, innovation, creativity and boosting visitor numbers. Our research shows the extent of the economic contribution made by the arts sector, and the value Sydney people associate with having a vibrant arts and culture sector.

Exposure to the arts and culture sector is one of the fundamental tenets on which a more innovative workforce is built, with the potential to give us an edge in new and traditional industries, and in different ways of working. In the global war for talent, the richness of a city's arts sector is crucial to attracting and retaining talent. A 2017 Create NSW research paper examines the value of incorporating arts and culture across the early planning, construction and management of innovation districts and concludes that arts-led place-making methodologies help to create 'urban vibrancy' and drive social and economic impact.⁷

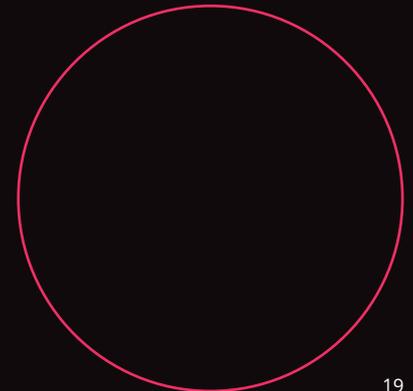
In a Sydney where growth and population expansion is so rapid, creating unprecedented demand for housing, for better transport and infrastructure, this Create NSW research is an important reminder that there are some crucial aspects of a city that can't be created with concrete. In building the best version of Sydney for the future, supporting the expansion and growth of Sydney's arts and culture sector will be essential to the character of our great city and its population.

Business can support by starting or continuing sponsorship and patronage of the arts, perhaps looking at more ambitious or innovative work and being braver in what is supported. There is also huge scope for corporate organisations to partner with the arts sector beyond just monetary support, in looking at ways for their employees and artists or designers to work together, bringing greater creativity into the workplace to solve business challenges that are becoming increasingly complex. Progressive organisations can expand their focus on wellness to recognise the contribution that creativity can have to the holistic wellbeing and productivity of employees.

For us as Sydneysiders, a practical way to support the arts and culture sector is simply to take part. Visit a museum you've never been to, enquire about other ways to experience a gallery, maybe through a family session or guided tour. If you tend to visit only the major institutions, look locally to see what else, or who you could support in your neighbourhood.

“The changes that are majorly impacting the world around us, like the rapid advancement of technologies, the digitisation of everything and the growth in social media and collective ownership, are having an equally huge impact on how people engage with, consume and support the arts. There are challenges arising from these changes but also huge opportunities to be harnessed.”

Ross Harley,
Dean of UNSW Art & Design, Chair of the Sydney Culture Network

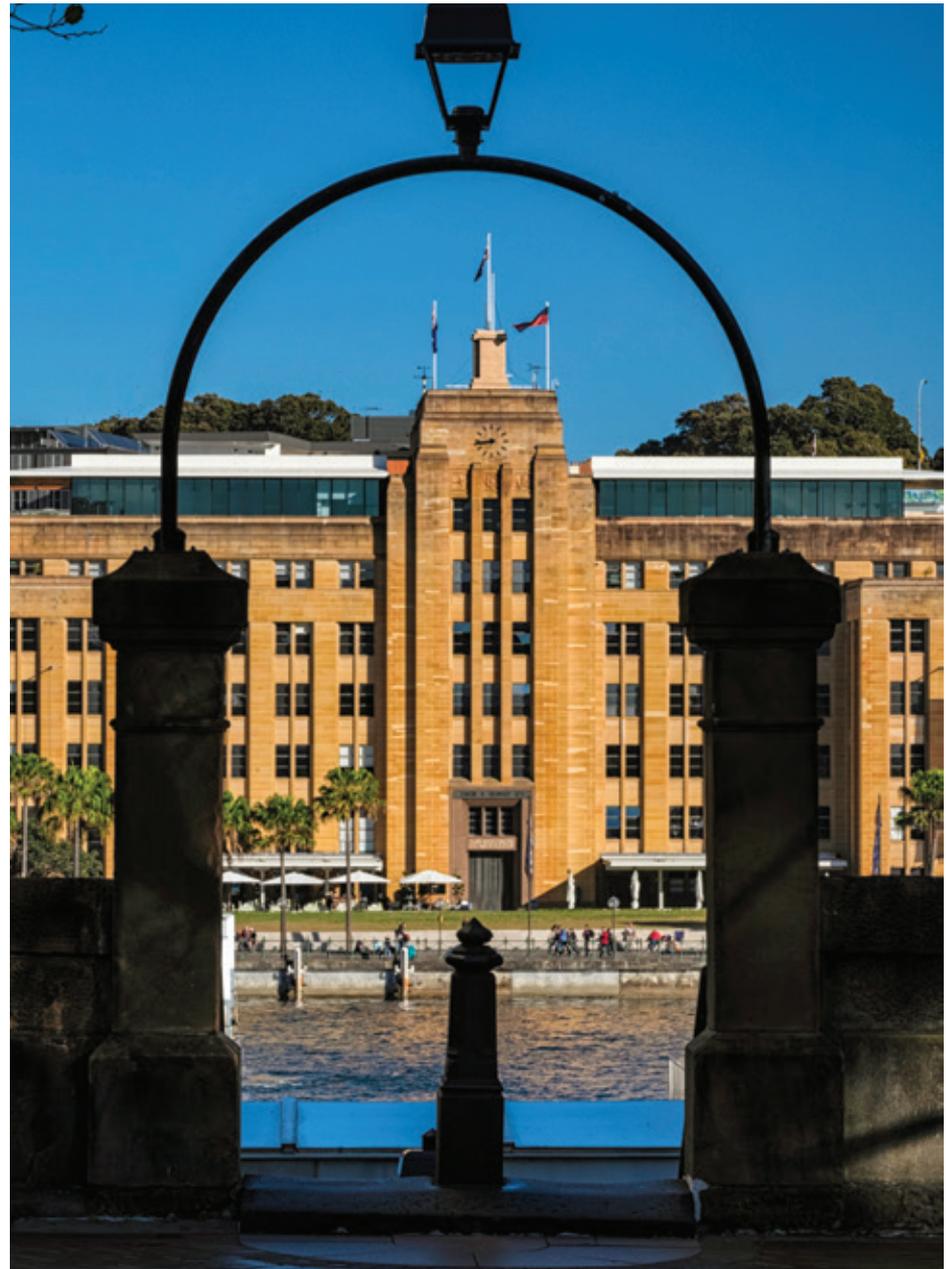


PLAY BACK:

Perspectives from some of Sydney's major arts and culture players

The art of Play: *Take it one step further at the MCA*

The MCA is in many ways the gateway to Australia, situated on the edge of the harbour at Circular Quay, a site with huge historical significance as the location of first contact between the settlers of 1788 and the Aboriginal population.



The person credited with the extraordinary turnaround of the MCA, and with the boundary pushing the institution has continued to do since, is Director Liz Ann Macgregor OBE. She talked to us about the reputation of Sydney as a flourishing home for arts and culture, and the importance of this in the context of our city's future.

“The MCA has a simple remit – to engage a broad audience with the incredible work of contemporary Australian and international artists. The last 20 years have seen a major expansion of the museum’s audience, from under 100,000 visitors a year to over 1.1m today, through a range of initiatives and evolutions, big and small.

I think the best way to describe the approach we have taken is that we don't shy away from presenting difficult work but we make sure that the visitor experience is engaging. Indeed one of our mantras is that we make challenging art accessible. We are an avenue for people to experience contemporary art and ideas. Exhibitions are key to the museum’s reputation but the success of the museum goes beyond the galleries. The whole visitor experience matters: the building with its stunning location and views, the café and shop, the creative learning programs, our welcoming hosts who can talk about the work, our online resources including artist interviews – these all contribute to making the MCA accessible and engaging for people from all backgrounds. It’s always been a personal priority of mine to break down prejudices not just about the arts, but also around the type of people who can ‘appreciate’ art. Art should not be exclusive or only accessible to a few and so it’s important to create a welcome, open and inclusive atmosphere.

Before I took the position in Sydney, I was warned that it would be a struggle to get people’s attention focused on contemporary art and away from an obsession with real estate and the beauty of the harbour! But I’ve always felt that Sydney people are welcoming, open and curious – outward looking and interested in art. Of course they go to the beach. Of course they love the outdoor life. Why wouldn’t you? But there is also this desire to engage with art and ideas and our visitor numbers speak for themselves.

The arts scene in Sydney is dispersed, which is a defining and important characteristic. We do have major institutions in the CBD, but away from the harbour there is Carriageworks, White Rabbit in Chippendale and in the west a network of important galleries including Campbelltown, Blacktown and Penrith Regional Galleries. We have great infrastructure and innovative programming across the whole city.

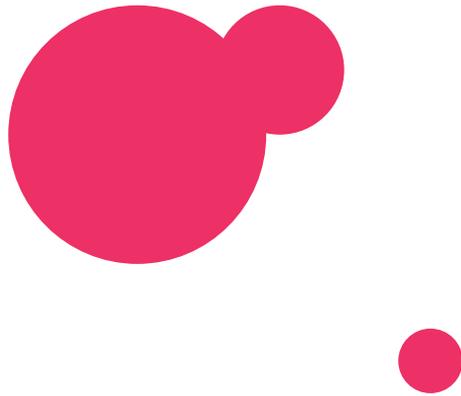
I think this diversity has fostered greater collaboration between arts institutions. And collaboration rather than competition is crucial if Sydney is going to be the preeminent city of the arts – this can only be achieved together. We can build on what we already do well, for example the MCA is a key partner of the internationally significant Biennale of Sydney and we also work closely with the Art Gallery of NSW and Destination NSW on the Sydney International Art Series over summer. Recently we started a new joint initiative with Carriageworks and the Art Gallery – the National is a biennial survey of Australian art presented across all three venues. We do so much more by working together.

Something that has really differentiated us has been our long term commitment to working with cultural partners and artists in Western Sydney and regional NSW. C3West is one of the MCA's key programs, predicated on the belief that artists can bring unique value to situations beyond the gallery context.

Our program in Western Sydney began with Penrith Panthers in 2004 and we have had many amazing partnerships since in Penrith, Liverpool, Goulburn, Blacktown and Hurstville. For example *Transforma* in 2014, a partnership with Campbelltown Arts Centre was a seven week residency by New Zealand-based artist Michel Tuffery. Located in Airds in South Western Sydney, it aimed to raise local awareness of the links between river health and behaviours such as arson, dumping and littering. To our knowledge no further illegal dumping of cars in the river has happened since that project. Art can change lives!

Like any cultural institution, our biggest challenge is funding – we are so ambitious in what we want to do, and simply don't have enough core funding. We are lucky to have attracted significant philanthropic support and we work closely with corporate partners. Businesses are starting to understand the importance of arts and culture in contributing to wellness in a holistic sense. We see an opportunity in developing the MCA as a place where companies can offer their workers wellbeing programs, a place to come to revive and refresh thinking. We have offered yoga on the terrace here and are working on ideas around creativity.

We believe that the museum can play a role in fostering the skills that will be needed in the workplace of the future – good judgement, ethics, empathy, creativity – all things that artists do. Art is play, but it's play with a purpose, which is about unleashing creativity and encouraging you to think differently. In our National Centre for Creative Learning, working with our amazing team of artist educators, you can learn about the process of taking an idea and realising it into a physical object. At the MCA we understand that process can be just as important as the end result. I think the business sector recognises that having a thriving arts and culture community is vital to a city. For Sydney to be a sophisticated city, a leader in the region, it needs the range of arts activities, from the more traditional art-forms like opera to the more innovative. A great city needs the whole ecosystem to be truly international and to attract the talent that we need to compete.



The best way that business can help develop the arts community is by being a little less conservative in what and how they support. Corporate sponsorship is so valued, and it could be even better if companies would commit to developing longer term relationships that can evolve over time, going beyond the transactional to achieve results that are mutually beneficial.

Politically, there has been an emphasis on funding for arts infrastructure, which is much needed. But there is a strong demand for investment in programs. Funding for the arts is often positioned as an 'either/or'. Would you like funding for health, transport, education, or for the arts? Obviously the arts comes last in that context. But if we ask ourselves "Do we want Australian children to be creative?" then the answer and funding balance will be very different. We need to give our children the skills of the future and creativity is very much part of that.

For the Sydney community I would challenge everyone to 'take it one step further'. If you are already coming to the museum, take part in something, find out about the creative process, meet an artist – join a members program and get behind the scenes, go online, contribute to the dialogue. Take the experience you're having and see how you can engage further and more deeply with us. I can guarantee it will be worth it."

PLAY BACK:

Perspectives from some of Sydney's major arts and culture players

Playing as one team: *Uniting the Sydney arts sector behind a common objective*

Sydney Culture Network is a group of cultural institutions and creative sector organisations working together to make Sydney a global leader in valuing culture. Their objectives are to implement collective strategies to connect Sydney's cultural offer, grow audience participation, and encourage greater engagement across the cultural life of the city.

Ross Harley, Dean of the Faculty of Art & Design and UNSW Chair of Arts and Culture is the Chair of the Network. He shared his views about communicating the importance of the arts and enhancing the international profile of Sydney as a place of creativity and ideas.

"The Sydney Culture Network was formed out of a desire from the various arts and culture institutions to be able to work better together on common issues such as training employees, sharing data and best practices. But it was also born out of a sense of frustration that the sector has not been able to effectively communicate its true value to government stakeholders, as well as to the wider public and business community.

Co-creation, the democratisation of who we get to hear from, and the increase in marginal voices are all huge opportunities for our sector, requiring us to reconsider our business models and how we operate.

Sport is successful in articulating its worth because it plays to the absolute intrinsic nature of being a human. In the same way in which sport and physical recreation is now completely accepted as an essential part of the experience of being human, for physical and mental wellbeing, the Network is seeking to embed the same degree of understanding about arts and culture. Engagement in the arts changes people's lives and contributes to the betterment of society. The desire to be creative is something that is fundamental to us as humans, it defines us, helps us to understand who we are and engages what I believe, are our inherent aesthetic sensibilities.

What we invest in the arts and culture sector in Sydney is low compared to other Australian cities. And then if you look outside of Australia, and compare our total investment in the arts to China's for example, it's a tiny proportion. They invest billions, confident in the incredible outcome it will have in the future for the educational, economic and creative output of their people.

So appreciation for the value of arts and culture is about that kind of investment. But it's also about understanding how the arts and culture permeate all aspects of life. Liveability and many of the things that people care about in their local communities are related to arts and culture, in all its many forms. We can't have a vibrant night time economy, for example, without things that make people want to connect, communicate and socialise. Museums that are open, small creative endeavours, pop-ups, music venues or artisans making and selling stuff. They are the things that people actually care about, that make them think 'this is a cool place to live and work'.

So to create that kind of city, it's not just about funding the high arts and the high museums and culture, we need to think about small, medium, and large institutions and artists in different forms who are all, in a sense, working to improve the life of a city.

Often arts institutions compete with each other for funding and audiences and don't cooperate enough. The Network is aiming to move the conversation away from who should get what slice of a limited pie, towards how to create a bigger pie for the benefit of us all."

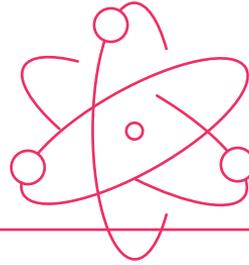
SOCIAL SYDNEY:

We asked Sydneysiders to tell us their favourite way to experience arts and culture in Sydney



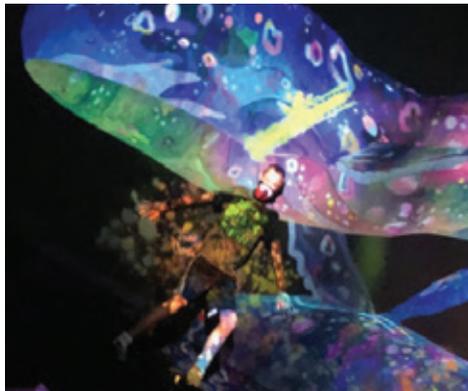
January 18, 2019 at 10:27am

I think the coolest way to experience art in Sydney is when it's combined with the beautiful natural surroundings. To me there is no better way to see some art and creativity than Sculpture by the Sea at Bondi every November.



January 16, 2019 at 6:00pm

My favourite place to #play last year with the kids was the Powerhouse Museum. The kids (okay... and me as well) spent hours in the exhibit creating drawings and seeing them come to life, moving on the walls; it brought a lot of colour to our life!



January 12, 2019 at 12:30pm

One of my favourite events in Sydney is the Sydney Festival held in January each year. During this time Sydney is on show, hosting a wide range of performances, exhibitions and installations by artists from all over the world, in many locations across our city. It is a great opportunity to experience something different and spend time exploring the city with family and friends.

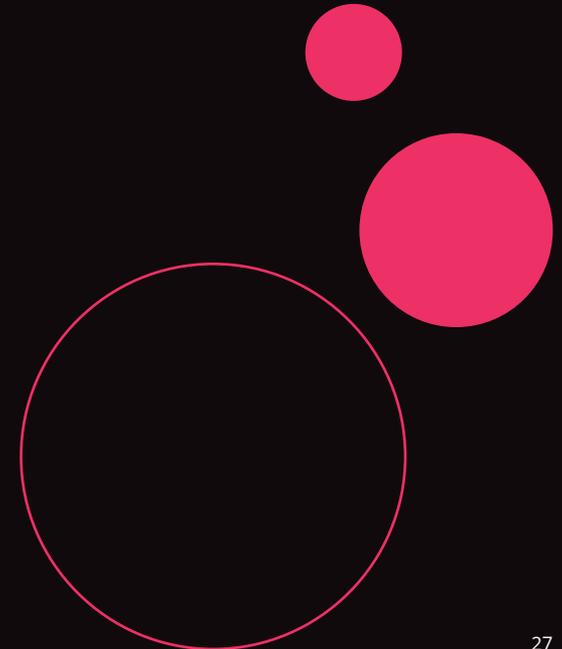


Our services

Deloitte works with our clients and the community to solve some of the most complex business, economic and social problems. We understand the need for creativity and innovative approaches to guarantee a prosperous future for us all.

Variety, fresh thinking and new approaches are all essential for developing creativity in business. For organisations looking to foster these skills, we offer advice on business and product innovation, diversity and inclusion advisory services, culture and change advice and human centred design and experience strategies. We even play simulated games in strategy development and testing.

For organisations in the arts and culture sector we can help with policy and regulation advice, economic modelling and valuing intangibles, asset optimisation, brand strategy and communication, ecosystem and partnering approaches, along with service and customer experience design.



Chapter 2 — Night time economy

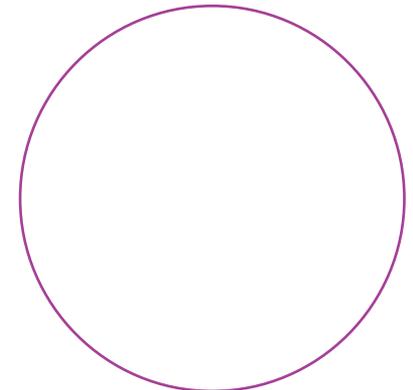
A night time economy to remember

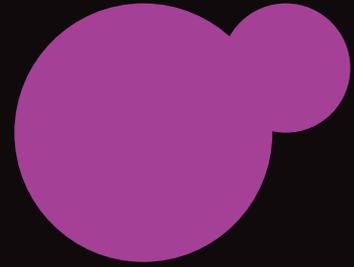
The nightlife of a city has close links to its cultural and community life – associated with leisure, downtime, fun and self-expression. Global cities don't shut down at 6pm – when the sun goes down, vibrant cities come out to play. And more and more in our fast-paced lives, city dwellers use the evening time to work, shop, exercise and socialise.

There's no way around it – night time in Sydney is a sensitive subject. The lock-out laws, introduced in 2014, have been an effective but contentious measure to curb alcohol-related violence and anti-social behaviour. The debate continues around the impact of these restrictions on the hospitality and live music industries, and the relative importance of this compared to the safety of Sydney residents.

While a lot of attention has been given to Sydney at night, the focus on liquor licensing and regulation has raised the volume, but not necessarily the level of discourse on this topic. It's reductive to think of Sydney's night time economy (NTE) as simply pubs and clubs, or the lack of them.

A vibrant NTE creates a range of opportunities for providers and users; from 24-hour gyms and supermarkets to late night art galleries, to extended shopping and transport choices. The NTE is also vital for a vibrant arts and culture sector.





Night time numbers

We estimate the value of the night time economy (NTE) in Sydney to be over **\$27 billion** per annum

In Greater Sydney, the NTE supported almost **234,000** jobs in 2017

Sydney has the strongest and most concentrated night time economy in Australia, with over 180 NTE establishments per km² in the Eastern Harbour City alone⁸

In Australia, NTE revenue was **\$122.5 billion** in 2017

The NTE accounts for around 6% of the UK's economy but less than 4% of Australia's



What is the night time economy?

“The lights, sounds and social exchange at night create a city’s unique atmosphere and attract the young urban creative class. It is the driving force for innovation in the creative industries, digital economy and tourism.”⁹

The concept of a NTE relates to the activities that a population undertakes after work and school, occurring between 6.00pm and 6.00am and predominantly consisting of consuming food and alcohol and experiencing entertainment.¹⁰ The NTE is usually split into the evening economy (6.00pm to 12.00am), and the late-night economy (12.00am to 6.00am).

The NTE is not, however, just the domain of the urban, bright young things. As more daytime businesses and service providers extend their operating hours, the NTE is appealing to a broader age range and is becoming more inclusive of different demographics.

Where activities are starting to be offered around the clock, including shopping, going to the gym, libraries, museums, theatres, and other family-related events, most global cities are now evaluating the benefits that arise from supporting the NTE with policy and services, including transport and regulation.

A strong NTE encompassing vibrant social venues like bars, restaurants, live music festivals, nightclubs, theatre, dance and musical performances, food festivals and sport events attracts visitors and entrepreneurs, creates jobs and drives the economic development of cities.

The way we play — night time economy



Planning for a vibrant NTE

A more vibrant, inclusive, attractive night time economy does not necessarily mean having a bar on every corner.

A narrow focus on drinking culture serves only to define night as a negative space, where crime and conflict are some of the associated potential risks, with a corresponding need for regulations and restrictions. This is in contrast to the daytime, where there is a positive, strategic approach to managing daytime uses and activities – commuting, schools, retail parks, shopping centres, office buildings.

The NTE is becoming more recognised as a driver of economic growth and a substantial part of a nation's economy. It's not surprising then, to see planning for it becoming increasingly important to many cities around the globe. If we could shift the planning for Sydney's NTE from a reactive, restrictive one, to a strategic, planned and open process, the opportunities to be gained are significant.

The city is different at night, and so planning to create a successful NTE needs to be approached differently too. While the NTE in Greater Sydney is growing, and the City of Sydney and other local councils within the region are crafting new strategies, when compared to international benchmarks, the NTE in Greater Sydney is still well below its potential.

The value and potential of the Sydney NTE

The NTE in Greater Sydney is valued at nearly \$27.2 billion, with \$15.7 billion from the food sector, \$7.1 billion from the entertainment sector and \$4.4 billion from the drink sector.

In 2017, the NTE in Greater Sydney supported almost 234,000 jobs; over 152,000 in the food sector, over 49,000 employees in the entertainment sector and almost 33,000 in people in the drink sector. Greater Sydney's NTE is estimated to account for 22% of national NTE revenue and employment and represents approximately 67% of NSW's total.¹¹

Figure 1: Estimated value of the NTE in Greater Sydney in 2016-17



Figure 2: Estimated value of the 'potential' NTE in Greater Sydney

\$43.3b

Potential value of Greater Sydney's NTE if NTE was 6% of Australia's economy

\$27.2b

Current value of Greater Sydney's NTE



In the UK, the NTE comprises 6% of the nation's economy, while in Australia it makes up only 3.8%. If the NTE in Australia was supported and nurtured, so that it matched the UK NTE, the estimated value of the NTE in Greater Sydney could be \$43.3 billion.¹²

A bustling NTE contributes to the creation of a modern, global city by:

Increasing business potential

In Western Sydney, Aussie NightMarkets increased business activity in the NTE for food and shopping stalls across Greater Sydney. Aussie NightMarkets is a moving night market that operates from 5.00pm to 12.00am for five to six evenings a week. Established in 2015 by a group of entrepreneurs aiming to create a vibrant NTE market for people to enjoy, by December 2017 they were attracting around 12,000 patrons and reflecting a diverse range of culture, art and food from around the world.

Creating a platform for artistic creation

A vibrant NTE fosters arts and culture, reflecting the identity of the region. In Western Sydney, the Parramatta Lanes annual festival in October has become a leading food and cultural event in Sydney reflecting the region's multiculturalism and supporting local artistic creation.

Sustaining visitor growth and cultural tourism

More than half of all visitors and two-thirds of all business visitors to Australia visit Sydney.¹³ The economic benefit of packaging experiences with cultural tourism activities such as the NTE is large. Vivid Sydney is the largest night time arts and cultural festival of its kind in the world and includes lights, music and art around Sydney. In 2017, 135,841 Vivid Sydney travel packages were sold to tourists, an increase of 53.7% from the previous year, with 65,491 of these being international tourists.

Creating economic opportunity

The NTE is a large contributor to a city's economy and is recognised as a driver of economic growth through the provision of additional activity including expenditure, employment and tourism. Eastwood has gained a reputation as the busiest NTE district in Greater Sydney, due to two very popular night markets: the Eastwood Night Market¹⁴ and the Taiwan Night Market.¹⁵ The Eastwood Night Market is situated in the town centre of Eastwood, in a safe and vibrant pedestrian area. With free jumping castles, free kids activities, entertainment and various food stalls, it appeals to people of different ages and cultural backgrounds. The Taiwan Night Market includes food stalls, market retail and gaming areas, a kids playground, as well as outdoor performances. Together these markets attract thousands of people, support business activity in the region and foster community relationships.

Creating jobs

In 2013, the City of Sydney in collaboration with the Potts Point Partnership introduced a one-year trial to grant extra outdoor dining space for cafes and restaurants in Llanckelly Place. The City also worked with local businesses and residents to improve the sense of community and create a village feel in the laneway that included live jazz, public art, street markets and lights. This trial resulted in more people visiting the area, new restaurants, increased staff hours for existing restaurants, and a reduction in the number of vacant shops.¹⁶ In November 2018 the City of Sydney proposed extending the trial to surrounding areas due to its success.

Building community relationships

NTE activities foster a sense of identity within the communities that host them. Every September, Camden Council in Western Sydney organises the Camden Festival. It includes activities for every age such as Cinema under the Stars, Picnic in the Park, Camden Garden Festival, a youth movie night, and Taste, a food, wine and music festival. In North Sydney, the Twilight Food Fair has been operating since the 1990s providing international food, relaxed dining and live entertainment for local families and residents.

Locally and globally

Night time activities make major contributions to the economies of some of the world's greatest cities. The NTE in the UK is worth around £66 billion annually. In London, the NTE is set to grow by £2 billion over the next two years.¹⁷ Between 2010 and 2014, San Francisco added 12,000 jobs in nightlife businesses, a 25% increase to more than 60,000 people. The city of Rosario in Argentina started a night picnic in 2017. Over 50,000 people attended the first event and it is now run throughout the year in different parks. Amsterdam's NTE was one of the main attractions for the 5.2 million tourists that visited the city in 2014.¹⁸

The way we play — night time economy



Imagine the future night time economy in Sydney

It's critical to consider all aspects of the NTE, including safety and security. But as we move towards a true 24-hour city, it's equally important to think beyond this, in a way that is innovative and strategic. We have a lot to gain by expanding a public and private sector driven NTE.

Global workers expect a vibrant and exciting NTE. Sydney can't compete for talent on the world stage without fantastic after-dark fun and 24-hour amenities. There is an advantage for corporate Australia in contributing to the creation of energetic, interesting night time zones and activities to activate Sydney's NTE. This could include anything from partnerships with arts and culture or community groups to support for extended opening hours and local events, to communicating their support for a diverse NTE to relevant government and public sector stakeholders.

ImagineSydney: Live considered the issue of accessibility in Sydney. Harnessing the flexibility of a 24-hour city to reduce congestion and increase participation means more people, out and about, creating a bigger demand for services, space and products. For business and property owners this could mean realising greater returns on their investments due to increased occupancy and hours of operation, as well as the opportunity to create entirely new retail, service or entertainment offerings to serve night time customers.

A key tenet of Sydney's overall future strategy is the evolution to a polycentric city. Jobs are not the only consideration for people in deciding where to live. Individuals need amenities, cultural infrastructure and like-minded people to attract them to a place. Each economic hub requires comparable cultural and sporting facilities and transport infrastructure to attract individuals to move there. As Sydney expands and grows west and south, creating vibrant 24-hour economies will be the priority of many areas of Sydney, not just the Sydney CBD.

The City of Parramatta in Western Sydney recently developed a NTE discussion paper to encourage the view of the city at night as a vibrant, diverse and welcoming place.¹⁹ In the north of Sydney, the City of Ryde Council has published their *Community Strategic Plan*, with the aim of creating town centres that are active with attractive places to visit at night.

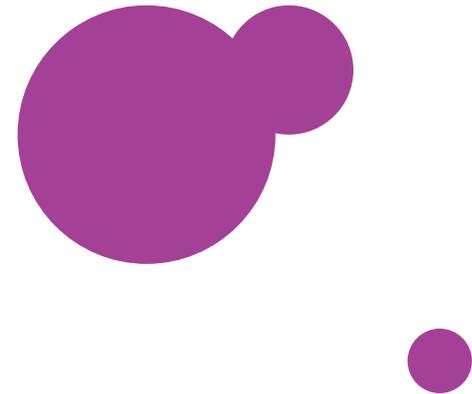
As the expectations of local residents increase, and authorities and business recognise the potential benefits of developing a strong and diverse NTE, we hope to see an increase in the number of similar plans from local councils.



The establishment of the Commission for the Night Time Economy in Greater Sydney was an important step towards addressing the NTE debate, as was the publication of the report based on those recommendations: *Sydney as a 24-Hour City*. The Commission's 22 recommendations, if implemented, have the potential to significantly move the dial on the opportunities the NTE offers our city.²⁰

Based on a year of research the report highlighted that Sydney has room to grow in comparison to other key global cities. Only 23% of spending in Sydney happens after 6pm, compared with 36% in Berlin. It also revealed that Sydney's night spend is predominantly in 'non-communal' categories such as groceries and food stores and Sydney's night spend falls behind when it comes to communal type spending at restaurants, bars, retail and the arts.

Moving the discussion away from regulating a drinking culture, towards a consideration of how we can use the NTE to create a strong social environment and urban culture will be crucial. There is definitely a major role for state and local government to play in regulating and developing policy that will stimulate and support a vibrant night time city. Planning and licensing that encourages initiatives like late night gallery and museum hours, live music or comedy and smaller bars with a different culture to one solely focused on drinking is important.



We as Sydney residents have a role too. We can choose to make the effort to support the businesses and service providers who are operating at night and offering extended services, to demonstrate the demand for more options for our night time economy. By voting with our feet we can contribute to creating a night time economy for everyone, everywhere in Sydney.



Bright lights after dark: *Vivid Sydney*

Having recently celebrated its tenth year, Vivid Sydney is internationally recognised and loved. The month-long arts and lights festival is held across Sydney, encompassing arts, culture, music and a range of exhibitions and talks. The festival highlights and celebrates our iconic infrastructure, including the Sydney Opera House and Harbour Bridge.



In 2017, Vivid Sydney attracted 2.33 million people, contributing \$143 million to the state's economy.²¹ The patronage specific to Vivid Sydney was measured based on the number of Vivid Sydney travel packages sold.

The patronage included the following:

- 23,009 visitors from China
- 6,738 visitors from India
- Over 5,500 visitors from the USA and Singapore
- 5,062 visitors from Japan.

Additional to the visitation numbers, Vivid Sydney has experienced international recognition, receiving 13 awards at the 2017 International Festival & Events Association Pinnacle Awards.²²

PLAY BACK:

Perspectives from some of Sydney's major NTE players

Going west for culture, inclusion and community

Parramatta is fast achieving a reputation as a thriving centre for unique, family friendly events celebrating cultural diversity and creating a welcoming, safe and inclusive atmosphere. Christopher Snelling, Manager, City Experience at City of Parramatta Council and Paul Osborne, Festival Director for the annual Parramasala festival staged in Parramatta, spoke to us about creating experiences that are unique, and reflective of the local community.



Christopher: “The experience that Parramatta is trying to deliver, both for our residents and for visitors to the area, is one of equity, equality and inclusion. Everyone is welcome here. We are also trying to be authentic in all that we deliver for the city. Parramatta has been on an interesting journey. First a rich food source for the Darug people, to very much an urban centre after early colonial settlement, then we became a suburban centre, and we are now urbanising again to become Sydney’s Central City. Throughout this journey, we are focused on maintaining our authenticity, through keeping a connection with our people and our communities, and making Parramatta a place where people want to be.

Parramatta has a very important role to play for communities and audiences within a 30-minute drive radius and west of us. We have lots of grass roots culture and community organisations in our own backyard. We’re geographically the centre of Sydney, we’re so diverse in our languages, food, culture and faiths. We have a leadership role to play in delivering and presenting arts and culture to the region, and we need to do that in a way that is reflective of the area.

We’re in the process of developing a night time economy strategy for Parramatta. I’m proud to say we recently saw the opening our first small bar (Uncle Kurt’s) in the Parramatta CBD! There’s a huge appetite and willingness from a patronage and a business point of view to invigorate and diversify the city’s night time offering, as well as the political will to focus on this. However, we also need to acknowledge that there have been issues in the past in terms of what night time experience in Parramatta has looked like. We’re working collaboratively with stakeholders like the local police and local businesses to take everyone on the journey as to what’s achievable to deliver a truly vibrant and safe night time offering.

As Sydney’s Central City we have a lot of aspirations and exciting ideas. With the Powerhouse Museum relocating to Parramatta, there is already discussion that it would be an eighteen hour museum, rather than a traditional nine to five museum. In the new civic building planned for Parramatta Square, we’re proposing that the new city library would open late, possibly until midnight.

The Parramatta Lanes Festival has been a great example of a successful festival that supports the City’s night time economy strategy. The objectives of the festival are to increase positive perceptions of safety after dark in Parramatta, to open up, animate and curate city laneway spaces with unique food, music and art experiences, and encourage people who work in Parramatta to remain in the city after work. In six years, the four-night festival has grown from four laneways, and 6,000 festival attendees, to 14 laneways, 100,000 festival attendees and 60 stall holders, with an extremely positive flow on impact for local businesses in the Parramatta CBD.

In an outcome we didn’t anticipate, the festival has also become a testing ground for businesses thinking about opening or relocating to Parramatta. Off the back of successful trials at the Parramatta Lanes Festival, Neil Perry’s Burger Project and Butter Fried Chicken from Surry Hills have set up businesses in Parramatta. It’s a really good measure of confidence in our city and an example of how social and cultural events can drive new permanent investment.”



Paul: “Masala means mix, and it’s a great word for what happens with Parramasala. The festival is a coming together of many cultures and the beautiful fusion you get when that occurs successfully. The diversity represented at the festival and the broad range of cultures and talent that we showcase has earned us a reputation as a really unique event. However I don’t feel that what we’re doing should necessarily be considered unique. We are representing the breadth of everything that it means to be a Sydneysider, or an Australian, really. We are diverse, we are different, we are a mix of so many cultures, and we all come together in Sydney. That’s what Parramasala showcases, and as such, I think in some ways it is one of the events that is truly most reflective of a modern Sydney and a modern Australia.

The festival is first and foremost a celebration of our community. There is so much happening in Parramatta and Western Sydney more generally, so we draw many of our performers from the local area. With emerging record companies, producers and performers the west is becoming a bit of a hub for hip hop and urban soul, and so we reflect that. There is also global standard local talent here in the form of dance studios and performers, and world class food options. So while we draw talent from

the area, as well as bringing in the best international acts, I’m confident that our line-up for the festival on any given night would be of the same quality and range as the line-up for any music festival or event anywhere.

Parramatta has its own identity which is different to that of the eastern suburbs, or Manly, Penrith, Liverpool and other places. We do want to attract people from other suburbs to Parramatta, and give them an experience that will make them want to come back. We need to balance that with continuing to tell our own story which respects our heritage and reflects elements of our culture.

I’ve definitely learned some lessons in bringing together this festival. Where multiple cultures are involved there is great diversity but also sometimes challenges! I think the best way to address challenges is to exclusively focus on the art. We select performers based on artistic merit, with the aim to truly delight and impress our audiences. When it comes to local talent, I take the attitude that I believe the talent is out there, we just need to uncover it. Starting with that mindset means we are constantly amazed by the depth of the talent that we find every year.

I’ve worked in the music industry and the night time economy for years in Sydney. I definitely think night time in Sydney has changed and probably irreversibly. Some of this is due to what we understand to be ‘music’ or ‘entertainment’ changing, as well as the physical infrastructure and space. I think part of the role of the festival world is to show people that you can go to events – particularly evening events – that are safe, that you can take your kids, that have a good balance of entertainment options. The changing landscape means that instead of going local a few nights a week, we may be more drawn to less frequent but larger scale mass expressions of culture like Parramasala.

I think an event like Parramasala, where we are actively coming together to celebrate difference, to learn and to share experiences together, and the natural joy that comes from that, is so important. And that is also what Australia is and what Sydney is – look around you.”

SOCIAL SYDNEY:

We asked Sydneysiders for their favourite night time spots

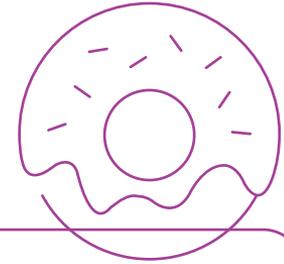
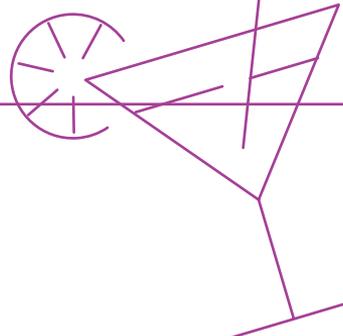
 January 17, 2019 at 5:56pm

Sydney is not known for street food past dinner time so this awesome Ramadan Food Fest is truly a unique celebration for our city. Lakemba comes to life during Ramadan (even in the rain!) and this food market runs from sunset to early hours of the morning. There's Koshari, camel burgers, knafeh, kaak and mandatory meat on a stick. Alas it's only on during Ramadan – wishing this could be something that's more permanent.



 January 19, 2019 at 11:11am

Compared to other cities I've lived in, I think you just have to be a bit more innovative and willing to spend a night travelling to different spots to make the most out of it as Sydney is quite stretched out. There are a heap of good restaurants, byo-joints, after dinner drink spots and other things to see around this beautiful city but I think you need to just embrace the fact that it's not really possible to have all that you want in one spot at night. There is a lot happening but I think different suburbs give you different things to do at night. Even if you don't want to drink, just walking around the city is unreal!



 January 23, 2019 at 12:30pm

Sydney is great for diversity of food, something for everyone and it reflects the multiculturalism of our people.

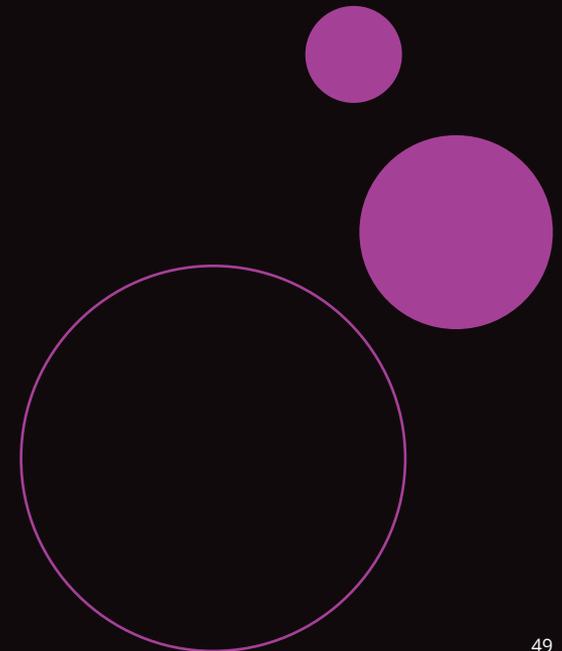


Our services

Deloitte is committed to playing a part in ensuring that Sydney takes its place as a great global city. Creating a thriving, vibrant, inclusive NTE is a crucial part of making that happen.

For organisations considering expanding their services to take advantage of night time opportunities, or government bodies considering policy and regulation to facilitate this, we have a range of services that can help.

We provide economic modelling, policy and regulatory advice. We can also advise on scaling small or medium sized operations and innovative ways to attract and engage with consumers. We also offer spatial experience design along with all important risk management advice.



Chapter 3 — Sports and recreation

Home advantage for sports in Sydney

Where you live materially affects your health, and this is especially true of cities.²³ With the proportion of the population choosing to live in urban environments growing globally,²⁴ it's an ongoing balancing act to combine development with green space as our cities increase in density. So living in a city that provides easy access to green space and sport facilities, with a climate to be able to enjoy recreation year round, and a beautiful natural environment in which to do so, makes us, as Sydneysiders, a fortunate bunch.

Opinions on the best thing about living in Sydney are diverse. But one thing we all tend to agree on is how beautiful the natural environment around us is, which in turn inspires people to get out and experience their natural surroundings as often as possible.

As such, sports and recreation, whether through solo pursuits like running, yoga or cycling, group activities or simply attending and supporting your favourite team at a sporting event, are an integral part of the Sydney experience.

Having good access to the facilities and resources to be able to do this also contributes to the health of the city, physically, mentally and economically.²⁵ This chapter of *ImagineSydney: Play* explores our current sporting and physical activity habits across the Western Parklands City, Central River City regions and Eastern Harbour City.

“With four elite football codes plus cricket in the summer, our climate, our harbour, our facilities, national parks all around – Sydney is a great city for people who love the outdoors or love to participate in or watch sport. The biggest problem is choice – what to do!”

Tony Shepherd AO
Chair of Sydney Cricket Ground
Trust and the AFL GWS Giants

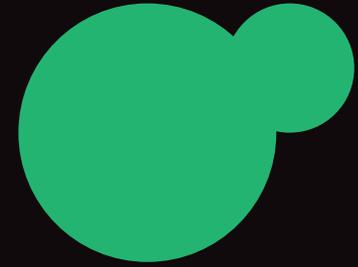
Sport stats

People in Greater Sydney spend **\$3.2 billion** per annum on sport and physical recreation

People in Greater Sydney spend almost **four hours** on sport or physical recreation per week

Under 35 year olds spend the most time and money on sport and physical recreation

3.5 million overnight visitors attended sporting events in NSW in 2016/17



How active are Sydneysiders?

People in Greater Sydney spend, on average, almost four hours on sport (defined in our survey as including both organised and non-organised sport, incorporating competition, organisations and/or rules) or physical recreation (conscious pursuit of activity without rules, organisations or competition, but pursued to achieve a health outcome) each week. But there is a difference in the rates of participation across different parts of our city.

People in the Eastern Harbour City region spend the most time on sport and physical recreation per week (4 hours, 20 minutes), in the Central River City region they spend 3 hours and 50 minutes and in the Western Parklands City, just 2 hours and 50 minutes.

Australia's Physical Activity Guidelines²⁶ recommend individuals aged 18–64 should try to achieve 2½ to 5 hours of moderate intensity physical activity per week. So the good news from our research is that on average, Sydneysiders are meeting these guidelines.

Other participation data²⁷ indicates 3,681,500 NSW adults participated in sport or physical activity at least three times a week in 2016. This was a participation rate of 59%, in line with the national rate of 60%. Almost 292,000 or 21% of NSW children aged up to 14 years participated in organised sport outside of school at least three times per week, which includes games, training and practice, also in line with the national rate of 20%.

Participation in sport and active recreation is a priority because it benefits the wellbeing and health of individuals, the social cohesion of communities as well as boosting productivity and the economy.

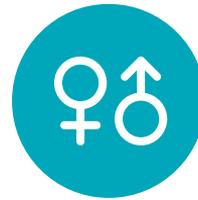
The way we play — sports and recreation



How Sydney gets active



The most popular sports and physical recreation activities in Sydney are walking for exercise, fitness/gym and swimming/diving. Those under 35 are most likely to get involved in fitness/gym activities, and those aged over 65 are more likely to play golf than other age groups.²⁸



On average, men spend more time and money than women on sport and physical recreation. And, although gender stereotype reinforcing, women are more likely to be yogis, men are more likely to be cyclists.



Men spend more time and money on sport and physical recreation each week (at 4 hours 10 minutes and \$17.70 a week) than women, who spend \$16 a week and approximately 50 minutes less each week on sport, at 3 hours 20 minutes.



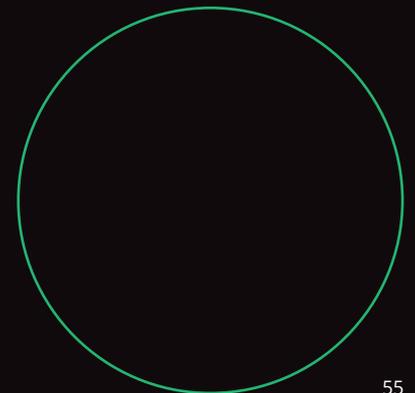
Fitness or gym is the most popular sport or physical recreation activity for those under 35 years old, with the popularity decreasing with age. Younger people (under 35) prefer yoga, with those over 35 preferring jogging or walking for exercise.



People in Greater Sydney under 35 spend the most time and money on sport and physical recreation each week. In general, the amount of time and expenditure on sport or physical recreation each week decreases with age. Those under 35 spend as much as 4 hours 50 minutes and \$18.60 each week on sport and physical recreation compared to those over 65 who spend just 2 hours 55 minutes and just under \$10.

Research from the Australian Sports Commission in partnership with the CSIRO reported a range of findings which may explain preferences for how Sydneysiders exercise. Australians:

- Are increasingly time poor, have limited budgets and are being inundated by new forms of entertainment
- Have new preferences for greater flexibility, more tailored products and sport that works around peoples' busy lifestyles
- Are increasingly favouring more flexible, non-organised forms of physical activity, such as running with headphones on and pursuing new adventure sports
- Are developing new tastes as our population becomes more culturally diverse.²⁹



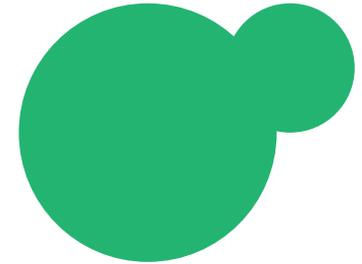
What Sydney spends on sport and recreation

Australians spend nearly \$11 billion per annum on sport and physical activity participation fees, according to the Australian Sports Commission.³⁰ Deloitte research reveals that people in Greater Sydney spend \$3.2 billion per annum on sport and physical recreation. On average, higher income earners are spending much more time and more money on sport.

However, those on incomes lower than \$15,600 a year appear to spend more each week on sport than those earning between \$15,600 and \$41,600 a year. This is likely to be driven by student participation in sport.

Very high income earners (above \$100,000) tend to spend less on sport and physical recreation compared to those in the \$65,000 to \$100,000 range.

Throughout Sydney, people spend significantly more on participation in sport compared to physical recreation averaging \$11.20 per week compared to \$5.60. People in the Central River City region spend the most money on participating (\$19.50/week), closely followed by the Eastern Harbour City region (\$19.00/week).



In relation to children's participation in sports, family income levels are a major factor when it comes to participation rates. Higher-income families are far more likely to have children in sport programs with 84% participation as compared to low-income families with 58% participation. Recognising that cost is a barrier to participation, the NSW government in 2018 rolled out the Active Kids program, where parents, guardians and carers can apply for a \$100 voucher per calendar year for each student enrolled in school.³²



The broader contribution of sport to Sydney

Participation in sports contributes to the economy in a number of ways. Access to open space, exercise and sport contributes to our quality of life and physical and mental health. In turn this reduces the load on the healthcare system, creates healthier workers and students, and boosts productivity.

There are the sport and physical recreation activities participation costs that we pay to play, including gym fees, club memberships, equipment and related costs. And there is the contribution that major sporting events make to the Sydney economic landscape.

Sydney is home to a thriving professional sports and sports event sector. Consider the contribution of the teams permanently based here (eight NRL teams, two A-league soccer teams (and a further one announced for South West Sydney), two AFL teams and an AFLW team, NSW Waratahs and home of Australian Rugby Union, not to mention ice hockey, basketball, netball). Add to this the landmark sporting events held here (most recently the Invictus Games) and we can see that the professional sports and sports events sector is a major economic contributor and an important part of the fabric of how we play in Sydney.

More than 3.5 million domestic and international overnight visitors travelled to NSW in 2016/17 to participate in or attend a sporting event.³³

When Sydney hosts a major international sporting event, it also brings the eyes of the world to us through television viewing figures. These were estimated at more than a billion worldwide for the 2015 Asian Cup final, held in Sydney.³⁴ Similarly, the 2015 Cricket World Cup tournament was watched by more than 1.5 billion people worldwide and generated more than \$1.1 billion in direct spending, two million bed nights, and 295,000 international and interstate or inter-regional visitors to host cities, including Sydney.



The big guns

Destination NSW is responsible for bringing major spectator sports to Sydney, with benefits for Sydney's hotel market and flow on impacts across the broader region. In July 2017, Arsenal FC played Sydney FC and the Western Sydney Wanderers, attracting almost 28,000 domestic and international visitors, from over 15 countries, and contributing more than \$18 million to the state.

Source: Destination NSW

Sports and recreation infrastructure

The Greater Sydney Commission plan for Sydney states that people in urban neighbourhoods should be able to walk to local open space and that nature-based recreation also helps connect communities to the natural landscape.

The Commission's plans specify that high density development (over 60 dwellings per hectare) should be located within 200 metres of open space and all dwellings should be within 400 metres of open space. According to the Commission's published liveability plans, almost 98% of the Eastern Harbour City District's residents live within 400 metres of open space.³⁵ Almost 91% of the Western City District's residents live within 400 metres of open space.

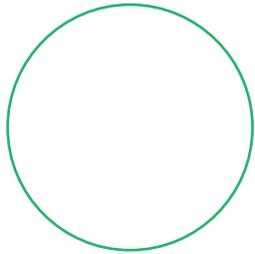
Money trees

The economic contribution of the *Royal Botanic Gardens and Domain Trust (RBGDT)* was \$140 million in the 2016–17 financial year. 5.8 million domestic and international visits to the three sites (RBG Sydney and the Domain, Australian Botanic Garden Mt Annan, Blue Mountains Botanic Garden Mount Tomah)

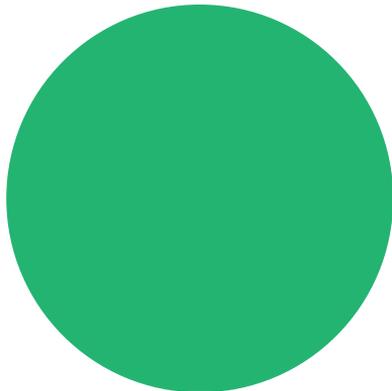
For every FTE employed directly by the RBGDT, more than three additional FTEs are employed indirectly such as those employed in the tourism sector.

The Australian PlantBank owned by the RBGDT has over 10,500 seeds in its collection and a current replacement value of \$50 million for both the facility and the seeds themselves.

As a Sydney icon and tourist destination, RBGDT's value is much greater than its economic contribution. The total social and cultural asset value of the three Botanic Gardens under RBGDT management is estimated to be worth over \$186 million per annum.³⁶



The NSW State Government this year announced they were dedicating \$290 million to boosting liveability and quality of life in Sydney by increasing green space.³⁷ Part of the package will see \$100 million set aside to identify and buy back land for public use and another \$20 million will go towards building or upgrading as many as 200 playgrounds.



The government is also delivering their Rebuilding the Stadia Network Strategy (2015), a \$1.6 billion project pipeline. The objective of this investment in key stadia infrastructure is to drive growth in the visitor economy, realise the economic and social benefits of strong cultural and sporting sector, and support liveability for the people of NSW.³⁸

Major projects underway include:

- Rebuilding the major NSW stadia network
- The new Western Sydney Stadium
- Lake Ainsworth Olympic Training Centre
- Southern Highlands Regional Shooting Complex at Hill Top
- NSW NRL Centres of Excellence Program
- Future Needs of Sport Infrastructure Study
- Indoor arena feasibility study and business case.

Imagine the future of sports and recreation in Sydney

The economic benefits of holistic wellness to the community and to productivity have been proven time and again.³⁹ In a moment where employee wellness is increasingly being measured as a KPI for executives, businesses based in Sydney, where physical activeness and a life connected to the outdoors is the norm, can reap the benefits of employee wellness and the improved outputs of satisfied workforces.

Our natural environment gives us a head start to being active in Sydney. You can surf before work, run by Sydney Harbour at lunchtime and stroll through Parramatta Park after dinner.

This ease of access needs to be protected and expanded, especially as our population increases. City planners, local councils and developers will need to consider how to provide access to open and green spaces in a landscape where urban density is increasing. Sports facilities will also need to keep pace with growing demand. Costs of accessing these facilities will need to be kept in range for our whole population, not just those on higher incomes.

Investment in major sports infrastructure is important, but needs to be balanced with a commensurate investment in and commitment to grassroots sporting teams and clubs, where the talent to keep these stadia filled is developed.

Better transport links to facilitate access to community level sports, and to provide a good experience to those travelling to sporting events is crucial.

Local sports and recreation facilities are the backbone of the sports community in Sydney. Consider taking the time to volunteer or become a member of your local club to show your support or give your time. They will appreciate it!

The best way we can ensure the continuing excellence of our access to, and the standard of, sports and recreation facilities, is to use them. We all know the benefits of exercise for mental and physical health and wellbeing. Why not make 2019 the year to try out new ways to be active in Sydney, and to explore some more of our amazing city in the process?



PLAY BACK:

Perspectives from some of Sydney's major sports and recreation players

Playing to win: *the importance of sports to Sydney life*

Sydney boasts an enviable array of professional sports teams, so the AFL's decision in 2009 to establish a second team in the west of the city was a brave one. Tony Shepherd AO, Chair of the AFL GWS Giants and the Sydney Cricket Ground Trust shared his views with us on the role of sports in Sydney, the challenges of launching a new team here and what's ahead for the future of sports and recreation in our city.

“With four elite sports codes plus cricket in the summer, our climate, our harbour, our ocean beaches, our facilities and surrounded by national parks – Sydney is a great city for people who love the outdoors or love to participate in or watch sport. The biggest problem is choice – what to do?”

So while this is great for people who live in Sydney, for those like us, trying to establish a brand new sports team with no support base, in an already crowded market, it was more of a challenge. But seeing how far we’ve come with the GWS Giants in seven years makes me very proud. What we’ve done with the team is maybe the best part of that for me – we took a group of 17 and 18 year olds and brought them together in Western Sydney. We not only had to teach them how to play footy, we also taught them how to cook, clean and how to live away from home. Seeing the young men that they have grown into, and the team and culture we have created with them, gives me tremendous pride. And successfully adding a Women’s AFL team and a National Netball Team to that club has only doubled that pride.

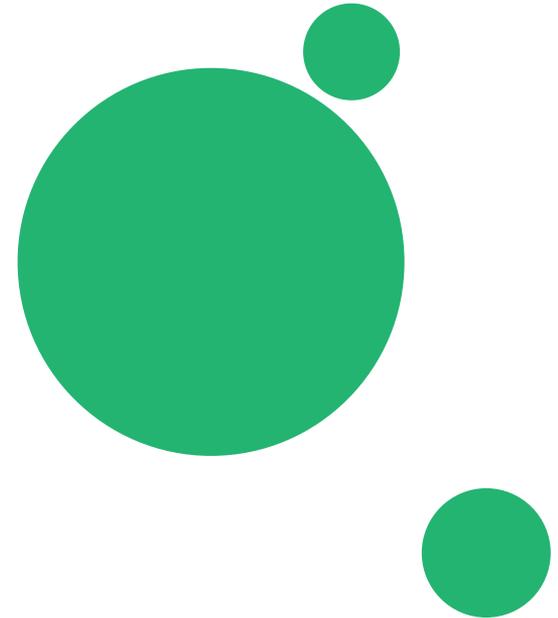
The reason for the AFL moving into Western Sydney was driven by demographic trends. We know that’s where the population is, where the growth is. If we are serious about becoming the national code, then we needed expansion into this area. And the people have really started to embrace us. We are up to 25,000 members and we’ve been in the finals the last three years. And that’s important because Sydney people – probably because we are so spoiled for choice – will only follow winners. Western Sydney is a great area, because if you show loyalty and interest, they’ll reward you several times over. We have a very active community program establishing our bona fides, our genuine connection with the community, with over 10,000 school kids coming through our WestConnex Centre every season, focused on health and education programs.

The AFL has been a pioneer in diversity and inclusion. The AFL leadership has moved the organisation to become more progressive and to cater to different demographics. We understand the demands on a modern household – parents are working all week to pay the mortgage, so family time on weekends is precious. They want family entertainment and a top class experience. It’s not about the dads heading off to the footy on their own anymore. AFL offers a family experience, recognises that both boys and girls want to play, helps families feel at home at the games and teams become part of the community.

Looking forward, the future success of sports in Sydney, both professional and local, will be reliant on the improvement of facilities. First up – transport links. All of the advantages that make us a beautiful city, also make us a difficult city to connect with transport. Current investments will help, but we have to continue to prioritise this. The upgrade in stadia will put us back on the map globally and domestically in terms of our available facilities, and we were really slipping behind here.

In the same way that that the MCA or Art Gallery NSW provide inspiration for budding artists, having talented teams performing at elite venues inspires young people and drives grassroots participation in sports. We won't all make it to an elite level, but we need to see those heroes to motivate and attract us into sport. I started middle to long distance running after being inspired by the 1956 Olympics and I am still doing it!

For the general public, I think the best thing we can do to support the sports sector in Sydney is look at ways to give back, especially in our local area. Every grassroots club is run by volunteers – have a look in your area and offer to give your time to help them – they'll be so grateful and it is such a rewarding experience."





Play for all: *Invictus Games Sydney 2018*

Togetherness. Fierceness. Celebration. Such are the words that describe the spirit of sport. After being inspired by the uplifting power of the Warrior Games in 2013, HRH Prince Harry, Duke of Sussex founded Invictus Games.



Invictus Games Sydney 2018 welcomed 491 competitors and over 1000 of their family and friends from 18 participating nations for 8 days of competition. The celebration of strength and recovery inspired many, and amassed 1000 avid volunteers for the event. The events were held in Sydney Harbour and at Sydney Olympic Park, enabling community participation and driving community spirit through play.

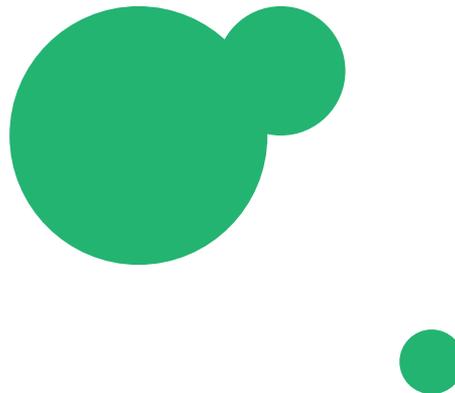
Invictus Games is competition, with an additional layer of inclusion and compassion. The games are focused on the welfare of active participants, but also resonates with all spectators who have had to overcome adversity. Adaptive sports inspire resilience and joy globally, and delivered the same to our playful city of Sydney.

It is estimated that competitors, family and friends, volunteers, and the general public spent approximately \$5.4 million during their stay in NSW and 94% of this expenditure was in Sydney. The total organising, planning and tourism contribution of the Games is estimated at \$29.7 million in value added and supported 211 FTE employees in the NSW economy.

In the five major Australian capital cities alone, around four million people viewed the ABC coverage between 20–27 October while 105,000 attended the Games in person.

A survey by the Invictus Games 2018 team showed that 84% of volunteers and 90% of the general public found their experience of the Games 'extremely' enjoyable, while 65% of competitors stated that they would subsequently apply to compete at the Invictus Games The Hague 2020.

Survey results also revealed a strong impact of the Invictus Games on mental wellbeing. This holds for both the mental health of the family and friends, and the mental wellbeing of the competitors. Across both groups, 73% of respondents stated that their mental wellbeing had improved by either a 'High degree' or 'Extremely high degree' as a result of their participation in the Invictus Games.



SOCIAL SYDNEY:

We asked Sydneysiders for their favourite sports and outdoor spots



January 22, 2019 at 3:03pm

Blackwattle Bay at sunrise after a winter row. The serenity of the inner west. It's a place of peace amid the hustle and bustle of Sydney. The hues change dramatically as the sun rises. It's peace in a busy world. And the rowing has allowed me to #play with new friends since I started in February after moving up from Canberra two years ago. It's also the place I walk my crazy dogs.



January 23, 2019 at 3:15pm

My favourite way to play in Sydney includes waking up and getting my workout done. There is a killer stair challenge in Coogee that will get your heart pumping! But the view from the top is worth the hard work that's needed to get up there!



January 17, 2019 at 5:56pm

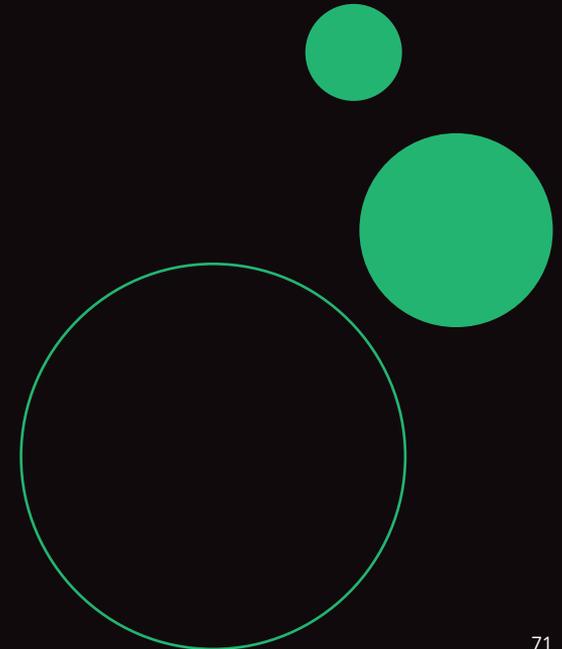
I feel that Sydney has such a great mix of city life and nature, where beaches like Coogee, Bondi, Manly are so close to the city. This is something I couldn't really experience back in Malaysia. Really blessed that I got the opportunity to study here and I can't wait to explore more nature places that Sydney has to offer.



Our services

To attract and retain the best of global talent, organisations need to recognise that commitment to the health and wellbeing of their workforce is one of most powerful recruitment tools they have. Deloitte implements wellbeing programs through our sustainability practice and measures the success of employee wellbeing schemes with our Wellbeing@work Index™ (developed and offered with Medibank).

We offer a full range of services to support and grow sporting organisations. These include; technology for stadia including IoT sensors and data optimisation; economic modelling, business case development, growth strategies; and experience design and innovation.



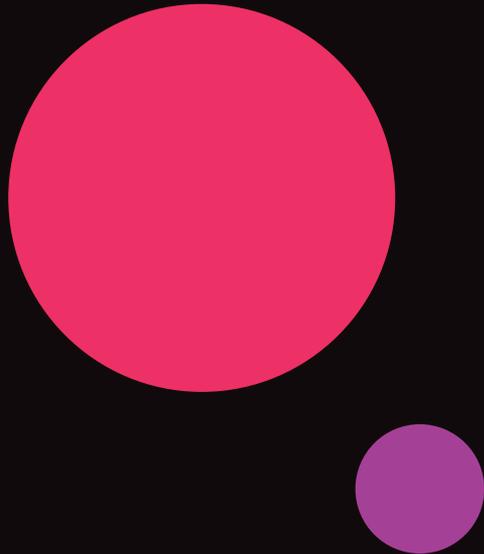
Play your way

ImagineSydney, the title of this series, is intended to inspire ideas for what Sydney could be – the inherent potential of our beautiful city.

A city – in reality, not just imagined – where there are safe, fun and inclusive, cultural and artistic activities, venues and facilities available in every local area, all the time. A city where these are distributed across three linked centres. A city where access to and enjoyment of our natural surroundings continues to be a priority, and where recreation, sport and leisure activities remain a defining feature of the Sydney experience.

Perhaps one of the most exciting things about this potential, is that there is a role for each of us as Sydneysiders and as members of the business and wider community in making it a reality.

A mentally and physically healthy workforce is crucial for a successful business environment. And a creative, vibrant city is a thriving city, a global city which attracts the best of global talent. Businesses can do their part to support this creative, inspiring future for our city by continuing to support arts, cultural institutions and artists by patronage. They can also do this through partnering with institutions in other ways, by running creativity initiatives for their employees to build capability, and by recognising the important role for creativity in problem solving in our complex world. In addition, they can explore how they might extend operations and keep facilities open for longer to make them more accessible overall, and to support the night time economy. And of course, they can prioritise and promote access to wellness initiatives and a positive work/life balance for employees, incentivising fitness and health initiatives and supporting both local clubs and professional sports franchises.



This report has detailed many of the government initiatives already underway or under consideration that will move our city forward; investment in sports and arts infrastructure, better transport links, and a more flexible licensing and regulation landscape for the night time economy. It is important for government to maintain their commitments in these areas. The tangible benefits from well-considered long-term investment in how our city plays will bring not only energy and excitement, but also lasting prosperity to Sydney.

Every Sydneysider has an opportunity to help Sydney take its place among the great global cities. The more we get involved, the more we participate in, advocate for and enjoy what Sydney has to offer, the greater the benefits for everyone.

Artists and arts and culture institutions rely on our attention and engagement to survive. Businesses in the night time economy rely on our custom. Sports facilities and clubs rely on volunteers, on us supporting and using them and attending games. Maintaining our beautiful natural environment requires our care and our vigilance, and our commitment to the importance of greenspace. We, as consumers, have the power to engage more, support more, spend more, use more and perhaps most importantly, to be more vocal on how important and how valued these elements are to us as Sydneysiders.

In doing so, and in working together to imagine a Sydney that reaches its true potential, we can make a tangible difference to our city's future direction.

Let's play Sydney – it matters.

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