



Night Time  
Industries  
Association

# **NIGHT TIME INDUSTRIES RECOVERY ROADMAP**



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# ACKNOWLEDGEMENT OF COUNTRY

The board and staff of the NTIA acknowledge that we are on unceded land of the Gadigal People of the Eora Nation. We pay our respect to Elders past, present and future and are privileged to celebrate a living culture of over 60,000 years.

I know a lot of friends that have gone overseas, and they say that the night actually starts at midnight, and it goes into the morning and you kind of want Sydney to be known as a place that you can do that, like without having the vibe of restrictions. We want to get to that period of time where there is freedom, just get out there and meet new people, start dating again. But now that we've got to get home by like 12:00, 1:00, it doesn't feel the same.

20 year old Sydneysider



# FOREWORD

## LORD MAYOR CLOVER MOORE



Since its formation in 2018, the Night Time Industries Association has played a significant role advocating for the revitalisation and growth of Sydney's nightlife by successfully bringing together providers and supporters of hospitality, arts, culture, events, and live entertainment.

The need for the Association has been crucial over the past two years as Sydney's night time economy has emerged from the devastating impacts of the lockdowns only to be faced by the challenges of the Covid-19 pandemic.

This Night Time Industries Recovery Roadmap 2022-2024 will be an important guide in re-enlivening Sydney after dark. Its recommendations are drawn from a Recovery Brunch held in the famous Spiegel tent on 4 March 2022. I am pleased the City of Sydney partnered with Sydney Fringe and the Association to host this brunch with participants from across the nightlife sector.

I am also pleased that the City partnered with the Association to gather a focus group of 18-to 30-year-olds who shared their views on going out as they emerge from the pandemic. Their insights have contributed to this report.

Many of the recommendations parallel and acknowledge the City's work. I look forward to the City working with NSW Government in achieving the Association's aspirations for a dynamic, diverse and safe nightlife.

Clover Moore  
Lord Mayor of Sydney



**IN 2017 IT WAS ESTIMATED THAT THE VALUE OF THE NIGHT TIME ECONOMY IN GREATER SYDNEY WAS OVER \$27.2 BILLION PER ANNUM AND THE INDUSTRY SUPPORTED ALMOST 234,000 JOBS.<sup>1</sup>**

In April 2022, the City Mayors<sup>2</sup> reported that Sydney has one of the strongest Night Time Economies in Australia, boasting the highest density of establishments per square kilometre, hosting several iconic attractions such as the Sydney Opera House, Circular Quay, Darling Harbour as well as a vibrant arts, culture and theatre scene. When combined with world class dining and bar options, they say the “City of Villages” offers it all. The Core Night Time Economy<sup>3</sup> is an important part of Sydney’s economy, representing 10% of all establishments in the city (the equivalent figure for both New South Wales and Australia is 5% of all establishments).

The pandemic had a considerable financial impact on the city’s Core Night Time Economy, with a drop of 14% in turnover and a loss of almost a quarter of employment in the sector (-24%) from June 2019 to June 2020. The entertainment sub-sector was the hardest hit in terms of employment – declining over 30% – while the food sub-sector saw the greatest decline in turnover (-16%). While these are large declines, it should be noted that they reflect the early months of the pandemic, prior to the implementation of the many approaches implemented by the (City of Sydney) Council and NSW Government.

According to the ABS’s payroll data<sup>4</sup> for June 2022, most industries – including accommodation and food services and arts and recreation services – have returned to pre-pandemic levels of employment.

Parramatta’s Core Night Time Economy establishment base grew by 5.5% between 2019 and 2020, greater than nearby Sydney (+0.3%), wider NSW (+1.5%) and Australia as a whole (+2.5%). A key driver of this establishment growth is Parramatta’s strong food sub-sector, which makes up 77% of its establishments, 68% of employment and 49% of sales turnover. This sub-sector gained an additional 39 establishments (+4.1%) between 2019 and 2020, with 22 additional cafés and restaurants and 17 takeaway food services, bringing the total number of establishments in this sub-sector to exactly 1,000. Despite this sub-sector’s growth, considerable business churn was experienced in the 2019-20 financial year, with 240 entries (a rate of 24%) and 191 exits (a rate of 20%). Entry and exit rates were higher than the national average (19% for both entries and exits), suggesting volatility in the local market.

1. Deloitte Play 2019 (\$27.2billion = \$15.7 billion from the food sector, \$7.1 billion from the entertainment sector and \$4.4 billion from the drink sector).

2. Measuring the Australian Night Time Economy 2019-20 A project for the Council of Capital City Lord Mayors, April 2022.

3. Core NTE are the activities that provide primary establishment services to leisure users between 6pm and 6am. The Core NTE is split into sub-sectors of Drink, Entertainment and Food and then further sub-divided. Measuring the Australian Night Time Economy 2019-20 A project for the Council of Capital City Lord Mayors, April 2022.

4. Payroll jobs rise into June’ - ABS website. Accessed 22 July 2022

# INTRODUCTION JUSTINE BAKER

CHAIR / NTIA



It's big, it's diverse and it's valuable - economically, culturally, and socially. Sydney has the strongest and most concentrated night time economy in Australia with over 190 night time economy establishments per square kilometre in the Eastern Harbour City alone<sup>5</sup>.

After years of lockout devastation for the hospitality industry and a further two years of COVID-19 induced lock down, greater Sydney is ready to be entertained. COVID-19 lockdowns depleted Sydney's vitality, crippling many industries, in particular our creative, cultural and hospitality industries. The Sydney central business district lost its identity. Once heaving with workers and booming restaurants, bars and clubs the city fell silent save for the brave front line staff venturing into the city for work. Restaurants, cinemas and entertainment venues have shut down or closed for good. The last eight years have taken a toll.

Greater Sydney needs to find itself once again. It's time to reinvent and revive what was always attractive about being a global city. An urban environment that is dynamic and bustling with tourists, locals, workers, home-grown businesses, and multinationals from abroad who all come together when there is a celebration to be had or a moment to be shared. We love our food, music, sport and culture and we love celebrations. It's time to find our inner night owl again. NSW must remain vigilant to the risks of COVID-19 while safely returning to the activities and experiences that make our state and global city so unique. Our 'Comfort Radius'<sup>6</sup> needs to expand, staying at home has never been easier and safer and the lack of a late-running public transport system does not make us confident to venture any further than our local neighbourhood.

The Night Time Industries Association (NTIA) applauded the creation of the role of 24-Hour Economy Commissioner in 2020. The role is crucial in leading and directing cross-government project teams responsible for the delivery and co-development of the 24-Hour Economy Strategy. With the continuation of the COVID-19 crisis, the NTIA will remain unrelenting in our NSW-focused advocacy work and in providing resources and information to support night time businesses and workers.

We see our role on the NSW 24-Hour Economy Advisory Group, and other industry groups, as the united voice that speaks for the night time industry operators as a collective. Our mission is to rebuild, protect and grow night time experiences and industries – encompassing providers and supporters of hospitality, arts and culture, retail, events and performance. We represent these industries collectively. We advocate, we educate, and we collaborate to support growth and innovation in the night time economy.

There is one thing that is certain, the night time economy cannot go back to 'normal', in the wake of lockouts and lockdowns not even a 'new normal' will suffice. Our industries have faced years of immense challenges, deficit business models and inequity. Bold operational change is required. As we face recovery, a once in a lifetime opportunity exists to make real and sustainable change to benefit the night time industries, its workers and consumers. New South Wales has seen unprecedented support from government as a result of the COVID-19 crisis. The opportunity for the night time industries is to decide how they use that support to build a stronger, inclusive, diverse and more resilient hospitality, entertainment, arts and cultural sectors in greater Sydney.

# FORGING A NEW PATH

**THE NTIA UNDERSTANDS THE ROLE IT HAS TO PLAY IN THESE CRUCIAL TIMES FOR THE INDUSTRY. AS THE COLLECTIVE VOICE OF THE NIGHT, THE NTIA EMBARKED ON A PLAN TO DELIVER THE NIGHT TIME INDUSTRIES RECOVERY ROADMAP. THIS ROADMAP WILL SERVE AS THE FRAMEWORK TO BUILD A STRONGER, SAFER AND MORE SUSTAINABLE NIGHT TIME ECONOMY. THIS JOURNEY BEGAN BY FACILITATING FRANK DISCUSSIONS AMONG SCORES OF INDUSTRY LEADERS AT OUR RECOVERY BRUNCH IN MARCH 2022. LEADERS OF INDUSTRY DISCUSSED WHAT THE FUTURE HOLDS, HOW IT SHOULD BE SHAPED AND WHO CAN BEST HELP TO REALISE THE CHANGE REQUIRED.**

The collective voice of the night would be incomplete without the voices of our city's emerging leaders. We conducted a survey in partnership with Time Out on live music to understand what young people are looking for on a night out. We partnered with the City of Sydney to gather a focus group of 18-to 30-year-olds who told us their big ideas, the hurdles they face on a night out and advice on going out and entertainment in our new post-COVID-19 world.

The response we have had from the under 30s has been inspiring and passionate. They have been locked down or restricted in their movement for over two years. They are ready to be free and are seeking quality after dark experiences.

The latest census data<sup>7</sup> has revealed that the number of Millennials (25-39 years old) has caught up to Baby Boomers (55-74 years old) as the largest generational group in Australia. And whilst COVID-19 has affected people in different ways, the social and economic impacts on young people have been profound.

According to the 2020 Mission Australia Youth Survey<sup>8</sup>, compared with older age groups, young people have experienced higher rates of psychological distress, loneliness, educational disruption, unemployment, housing stress and domestic violence.

The NTIA has been told in no uncertain terms that young people are concerned about their lack of voice in decision making. Rarely are they asked to take a seat at the table where their opinions and experience may be heard and considered. The NTIA has listened.

We are embracing under 30s by creating one NTIA Board position and a Youth Advisory Panel, to be led by our new board role. We will continue to seek the under 30s voice to ensure the night time economy reflects all of those who sustain it, not just those in positions of influence. The NTIA Youth Advisory Council will be a formidable asset for

our industries and members to ensure what we do is relevant, contemporary and sustainable. These are our future leaders, creatives, hospitality workers, entrepreneurs and founders. The night time industries need to embrace this voice now or fail to evolve.

We have searched for big, brave ideas that will challenge the status quo to drive lasting change. As a dynamic NTE industry we are best placed to create those authentic experiences that our audiences are seeking. An after dark culture that celebrates local talent in local establishments, partnering with the cultural and creative industries is the key to our success. This Recovery Roadmap identifies industries priorities to reignite the night. The plan requires collaboration and partnership with key industry leaders, government and community.

**AFTER TWO YEARS OF ESSENTIALLY STAYING LOCAL, THE PANDEMIC HAS CHANGED HOW WE ALL LIVE, WORK AND PLAY. THE CHANGE IS HERE TO STAY. "ACCORDING TO EY'S FUTURE CONSUMER INDEX RESEARCH, MORE THAN HALF (54%) OF ALL AUSTRALIANS SAY THE PANDEMIC HAS CHANGED THEIR LIVES "SIGNIFICANTLY", FROM HOW THEY WORK AND SOCIALISE, TO HOW THEY TRAVEL, SHOP, DINE AND ENJOY LEISURE TIME.**



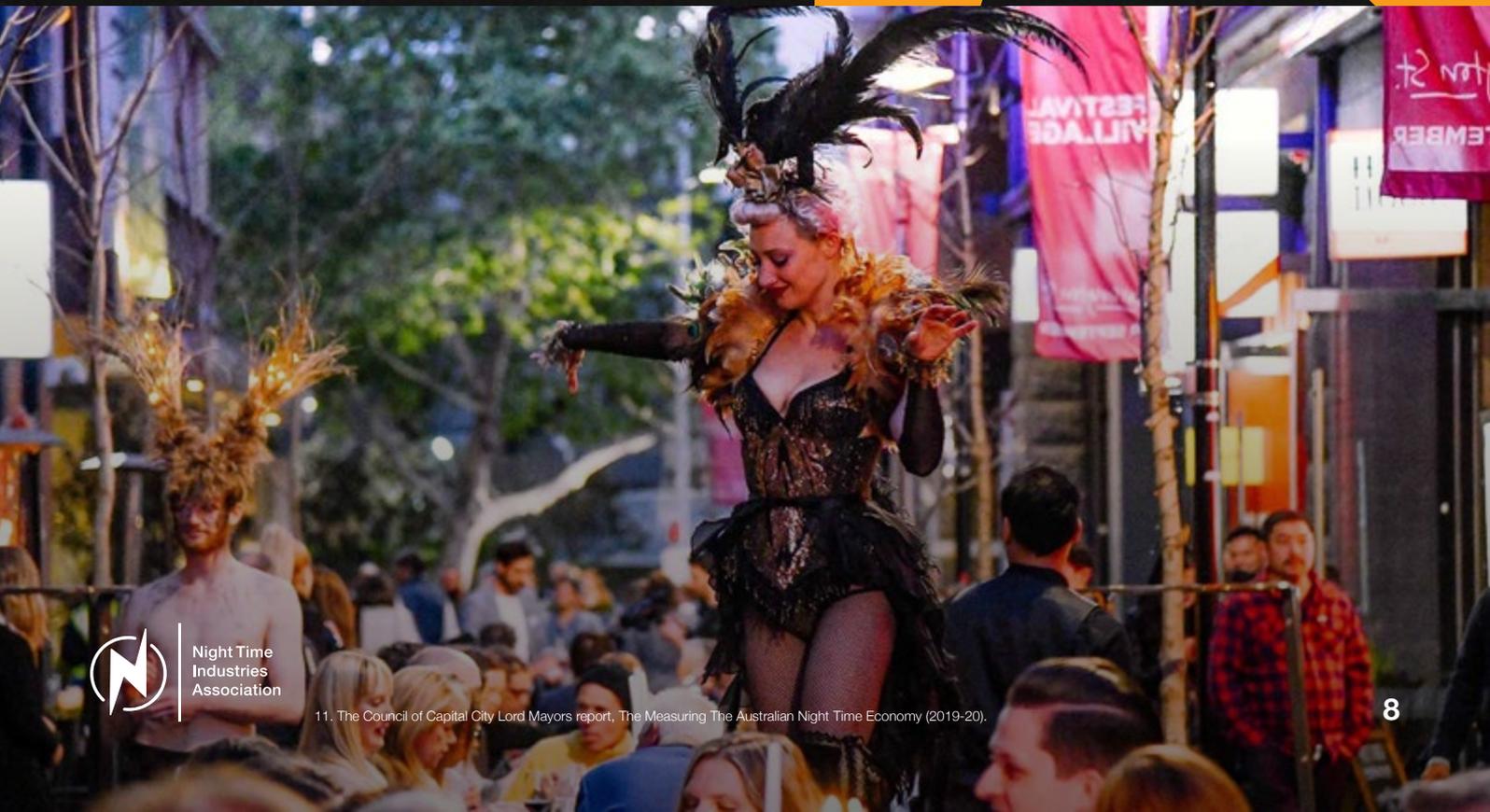


People have new perspectives on time and space. Six in 10 Australians say they plan to be more cautious of their spending in the future than they were pre-pandemic. A third say they are less inclined to choose experiences outside the home because of health and safety concerns. And half (50%) say their values and outlook on life have changed.<sup>9</sup>

**GREATER SYDNEY'S  
NIGHT TIME ECONOMY  
IS ESTIMATED TO  
ACCOUNT FOR 22% OF  
NATIONAL NIGHT TIME  
ECONOMY REVENUE  
AND EMPLOYMENT  
AND REPRESENTS  
APPROXIMATELY 67%  
OF NSW'S TOTAL<sup>10</sup>.**

# THE IMPACTS OF COVID-19 WERE SHATTERING.

In April 2020, more than half of accommodation and food services businesses were receiving JobKeeper payments, while by June 2020, **84% REPORTED A DECLINE IN REVENUE**, and the majority of these had lost more than half their income. The core night time economy [food, drink and entertainment contributed **\$128 BILLION** in sales turnover in 2019-20. But this was a decline of **\$12 BILLION** (9%) from the previous year. As a result, one in five night time economy workers lost their jobs. Despite this, in June 2020, the core night time economy accounted for 8.7% of the Australian workforce (895,000 jobs). Creative and performing arts lost 15,295 workers from March to June 2020, **DOWN 32%**. Of the 14 cities in the study, Sydney continued to have the highest density of core night time economy outlets, with over **191 ESTABLISHMENTS** per square km.<sup>11</sup>



# UNDERSTANDING THE CHALLENGES AND OPPORTUNITIES AHEAD

## NTIA X SYDNEY FRINGE FESTIVAL RECOVERY BRUNCH

On 4 March 2022, the NTIA partnered with Sydney Fringe and the City of Sydney in the famous Spiegeltent to bring together almost 100 of greater Sydney's culture and hospitality sector heavyweights for the Recovery Brunch. These leaders strategised creative ways our night time industries can recover from the devastating effects of the ongoing COVID-19 pandemic.

From bar and club owners, industry associations, big developers, small and large hospitality business owners, government officials, creatives and not-for-profit cultural organisations, these leaders came together under one big top with the same questions in mind – how does an after dark culture rise from a devastating and prolonged period of lockout and lockdown? What does the future look like?

These leaders concluded that this is a once in a lifetime opportunity to make real and sustainable change to benefit the sector and others in its ecosystem.

**We are already seeing changes to laws and planning legislation that are easing pathways to make things happen but it's still also very bloody hard to get things like this {the Spiegeltent} activation happen – the red tape (the process and paperwork) is overwhelming; our organisation can speak from experience.**

Andrew Coward, Reactivate Consulting

**Much of the hard work is done, the framework is in place to rebuild a vibrant, sustainable live music industry that contributes to the lifeblood and economy of every town and city across the state. We don't need further reviews, papers, committees, just the collective coordination to join the dots across agencies, tiers of government, and grants to make it happen!**

John Wardle March 2022,  
NTIA x Sydney Fringe Spiegeltent  
Recovery Brunch.

# THE RECOVERY DISCUSSION



**TO SURVIVE AND GROW,  
OUR INDUSTRIES NEED TO  
INNOVATE AND ADAPT.**

Justine Baker, Chair NTIA

The focus of the Recovery Brunch was to determine a solution-based approach to a renewed night time economy with industry. By agreeing on priorities and a shared narrative, industry, with government and the community, can raise public awareness and excitement that going out is more dynamic, exhilarating and safer than ever.

The hospitality industry, in particular, has suffered greatly from the lock outs, then the lock downs, a lack of quality staff, and a general lack of certainty and trust that new restrictions and hurdles are not waiting around the corner. This is not Sydney-specific or even Australian-specific, this is a global phenomenon that is being tackled. Industry is not doing this alone and it is possible to create a more dynamic and nimbler after dark culture. This can be done by seeking and testing new business models and embracing and nurturing the creative and cultural industries to bring vibrancy to our much-loved passion for good food, drink and creating memories.

First, industry should continue to collaborate to determine its future and build upon productive partnerships with governments. A truly global city can only be in existence if its after dark culture is robust, diverse and evolving.

The NTIA board, consisting of leaders in their respective industries, determined the following themes/priorities to be discussed at the Recovery Brunch:

**Consumer and Industry Confidence** - How do we instil confidence in our stakeholders and among consumers that a night out is a safe, exciting and rewarding experience?

**Creative Infrastructure** - In a post-COVID-19 world how do we ensure new cultural infrastructure comes onto the market? Small-medium independent investors and operators are tapped out, what is the role of developers and government agencies to fill the gap? What more can be done with new and existing building precincts, spaces and places to embed accessible/affordable space for culture and the arts?

**Facilitating Culture in Venues** - A strategic look at the impact COVID-19 has had on the hospitality sector and what a future might look like where authentic arts and cultural activity is part of the everyday. While we all grapple with how to re-engage audiences let's consider cultural activity as a prime motivator.

**New Business Models** - In a post COVID-19 world what new business models will be supported by new audiences? What are the drivers of the new models? What role does the audience have in sharing risk/ contributing to the financial structures of cultural activity? How do we communicate the true cost of doing business, what structures need to be embraced by all sectors?

**World Premieres** - Australia should be the place to see/ experience our emerging and leading artists/creatives before they take the world by storm, not after.

**Generational Opportunities** - We have a great opportunity to showcase to a new generation of people what our city has on offer well after dark - from late night eateries, bars, performance spaces, bookshops, galleries, retail and nightclubs. How can we create opportunities to educate and connect with younger generations and what are we going to do to bring forward this new generation of night owls?

**One Team, One Dream** - We have a 24-Hour Economy Strategy, and we have unprecedented investment from the government to activate precincts, streets and venues as part of recovery. How do we get buy-in from all stakeholders, from the directors, marketers, venue managers, and operational staff including external stakeholders like rangers and police to ensure that every level of an organisation and the city is committed to the vision?

**The Media** - As the voices of our city, the media industry, in all its forms, has a responsibility to communicate, support, nurture and drive the recovery process.

As a result of the COVID-19 pandemic we now have:

- Critical changes to hybrid and flexible working schedules
- A renaissance of our local neighbourhoods being bolstered by flexible working from home arrangements
- The collective desire to get on with life and have more down time
- A more discerning eye on how our hard-earned money and our very precious time is spent
- Premium entertainment and food offerings on our very own couch.



# THE NEXT GENERATION

The Recovery Brunch conversations were robust and positive, but the NTIA saw a gap in the night time conversations – missing were the big ideas, opinions, and aspirations of the next generation. The desire for entertainment among 18 to 30 year old's has changed. While music and entertainment are still in high demand, their tastes are more nuanced, and they are more discerning about how they spend their time and money.

**COVID-19 HAS  
TAUGHT US ALL  
TO CHERISH OUR  
WORK-LIFE BALANCE  
AND EMBRACE OUR  
LOCAL HIGH STREET.  
OUR NEXT GENERATION  
HAS A LOT TO OFFER  
ON THE SUBJECT AND  
THEY ARE SEEKING  
TO EXPLORE NEW  
EXPERIENCES THAT  
WEREN'T AVAILABLE  
TO THEIR PARENTS.**

# TIME OUT SURVEY

## LIVE MUSIC AND YOUNG PEOPLE

Knowing how critical live music is to our after-dark culture, the NTIA partnered with Time Out and surveyed young people between the ages of 18-24 and asked them directly what they want from the live music scene.

The survey received almost 800 responses from youth providing their views of live music in a post-lockdown world. The key findings were:

- A majority of respondents felt positive to get back out and do as much as possible after lockdown restrictions
- A preference for small, intimate and local gigs was seen throughout the data
- Compared to all responses, underground events were more popular amongst Sydney's youth population
- Rock and electronic music emerged as strongest music preferences amongst all respondents; however, among a Sydney youth audience (18-25) alternative, indie and hip-hop ranked significantly higher than electronic music categories
- Almost a third of Sydney residents say they go to a live music event a couple of times a month (31%)
- Most people have found out what's on in their cities via social media (whether through friends or through paid and business posts)
- Most people have found new music via music platforms (Spotify, Bandcamp, Soundcloud)

Despite lockdowns, 58% of the Sydney residents said they are keen to get back out and do as much as possible. However, a large percentage (33%), while keen to get back out, indicated they don't do as much in comparison to before lockdown.

From all survey respondents, 83% said they were looking to attend small music gigs, 77% bars, 75% music events (big), 69% music festivals.

A perfect night out is different for many, but the most common elements of a perfect night out included bars, pubs, great restaurants, theatre and performance for survey respondents. These mirrored what people had planned to attend in the future but can be used as a guide for what is key to a good night out for respondents.

From all survey respondents, most people found out what's on via social media (whether through friends or through paid and business posts). Word of mouth was also highly ranked, with 71% of the audience saying they found out what's on through their networks. Radio stations overall were how 30.9% found out what's on, with Triple J & Double J ranking highest compared to mainstream radio stations. Notably, local radio ranked higher than mainstream radio or TV.

**...the atmosphere...there's a lot of security guards, there's a lot of police presence and that's really killing the general atmosphere and the vibe and making it feel like you don't want to go out because you are being watched and made to feel like you're not behaving, we just want to go out and have fun".**

Under 30-year-old Sydney Female

# THE MISSING VOICE AT MARY'S UNDERGROUND

So public transport shuts off too early... the last train on weekends is sometimes at 12am or 1am, so, you know, that's a \$80-100 Uber, one way.

So that's a difficult decision. Is it Uber worthy? Most people choose to leave early. So later and cheaper public transport is what is needed, I think it would help boost the nightlife in Sydney.

Twenty year old from western Sydney



In June 2022, the NTIA made a call out for 18 to 30 year old's to share their ideas for what they want in their after dark culture. The NTIA sought to bring this group together to swap ideas, aspirations, and concerns to help us better understand how the industries can deliver.

The NTIA empowered young people to have the conversation and engaged two recognised young voices as conversation facilitators:

**Edwina Storie**, a journalist for Triple J's youth current affairs program Hack, covering politics, gender and sexual identity on Triple J's TikTok.

**Maleeka Gazula** a junior researcher for ABC TV, and a radio presenter at FBi Radio presenting 'Friday Breakfast', sharing independent music, arts and culture from greater Sydney and surrounds.

The NTIA handed over to Edwina and Maleeka to lead the conversation with thirty young Sydneysiders at Mary's Underground. After two years of lockdown, they are ready and willing to engage in greater Sydney after dark culture. They feel like they have missed out on two important years of socialising, creative experiences and making new friends. Maleeka and Edwina reported back at the end of the discussions summarising the findings in broadly six key topics.

**Affordability** - young people are feeling the pinch, particularly what the Sydney CBD has to offer is out of reach for many of them.

**Transport** - young people need more transport options, it needs to be regular, safe, run longer into the morning and be free after midnight.

**Safety** - young audiences need to feel safe when going out both when in the venue and travelling to and from venues. Young women in particular find travelling to and from venues, and at times being in the venues, overwhelming and unsafe.

**Content** - what's on offer needs to be relevant to a younger audience. Young people know there is amazing local talent that they see on TikTok or on music platforms that they feel is being overlooked.

**Communication** - how can younger audiences find out what is on offer? They are not tourists, referring to some event platforms currently available, they want real experiences and that doesn't mean hallmark major events or events based solely on a drinking culture.

**After Midnight** - younger audiences don't understand why some venues close before or just after midnight. They are looking to go out for the whole night through to the morning.

**Affordability** is a real barrier for young people, with the rising cost of living as a major impediment. Once a drink or food is purchased and an entry to a venue or ticket is paid for there is not much else left in a young person's weekly budget. A call to offer incentives like student discounts, group deals and last-minute tickets were some of the suggestions to assist young people to access after dark cultural experiences. The Sydney CBD was also seen as generally off limits to them with most venues being out of their reach budget-wise. Discussion was around the types of events they would be willing to spend a bit more on, these were events that supported social, cultural or environmental outcomes and those types of events that celebrated and supported local talent, examples like Supper Sessions at 107 Projects Redfern and Petersham's Oxford Tavern amateur strip night Show us ya Tips were strong examples.

**Transport** and safety are key hurdles for younger people, particularly those living and working in the western, southern and northern suburbs. Young women, and men, are not comfortable or feel safe with after dark public transport opportunities.

They raised poor irregular timetables that close off too early in the evening, a feeling of unsafe train carriages, buses and platforms all impact decisions to travel beyond the comfort radius of many. Because of these barriers talk of a night out being "Uber worthy" was heard loud and clear. With rideshare easily reaching \$80-100+ if you are living in western, northern or southern Sydney this is a critical factor to consider. Do you stay local or take the risk that the additional expense is worth it, and safe? The temptation to stay home is real.

**Safety** was seen as an issue for all. Not only getting to and from venues but also once they were inside venues and events. Security and police presence was often described as intimidating and off putting to having a good night out. Young women in particular found the ratio of male to female often overwhelming, security being very aggressive and intimidating and public transport being unsafe for them.

**Night time** offerings need to be more diverse to reflect the growing diversity among Sydneysiders. This includes drinkers and non-drinkers having experiences curated to them. A greater focus on wellbeing has influenced changes in drinking habits, this coupled with the diversity of the greater Sydney population means that alcohol focused activities and events are not the primary priority for young people. They are also not tourists and are generally not seeking the large hallmark events, they are seeking more intimate and relevant occasions to enjoy with their friends and family.

The live music experience is still important but how it is delivered has changed. The next generation are seeking curated experiences that showcase local talent and reflect the local community. Many spoke to western Sydney being seen as a hotbed of creative talent - music, fashion, art and culture - young people don't understand why this is not being celebrated and supported and why Western Sydney in particular does not have the venues to reflect this talent and the growing population. They acknowledge the amazing and diverse food experiences on offer but where are the clubs, bars, live music and performance venues that go later into the night?

This desire for authentic cultural and creative content is supported by the August 2021 report, The Next Generation of Voters, by A New Approach. Insights were gathered into the attitudes and beliefs held by ‘young Australians’ towards arts and cultural engagement and the role it plays in their lives.

The study concluded that they don’t associate arts and culture with elitism – they see it as integral to a full and rounded life. We have a lot to learn from this authentic experience being sought, this is our future for a thriving after dark culture.

**YOUNG AUSTRALIANS VIEW ARTS AND CULTURAL EXPERIENCES AS BEING WOVEN INTO THE VERY FABRIC OF EVERYDAY LIFE. THEY DON’T ASSOCIATE ARTS AND CULTURE WITH ELITISM – THEY SEE IT AS INTEGRAL TO A FULL AND ROUNDED LIFE. AS SUCH, ARTS AND CULTURE WILL PLAY AN INCREASINGLY CRITICAL ROLE IN SHAPING OUR NATION’S FUTURE DIRECTION, AS THE ARTS AND CULTURE THAT YOUNG AUSTRALIANS SO ENTHUSIASTICALLY ENGAGE WITH WILL HAVE A PERVASIVE INFLUENCE ON HOW THEY THINK AND BEHAVE.**

This will, in turn, inform both the opportunities and preferences of many Australians in the coming decade. Young Australians have told us that arts and culture is embedded in every aspect of their lives, every day, in almost every kind of activity. They value arts and cultural engagement because it:

- helps them express themselves
- helps them connect with others, both alike and different from them
- makes them feel inspired
- helps them learn new things and think differently about the things they already know”.<sup>12</sup>

The underground scene was shared by participants with hesitation, but it was seen as critical to the discussion. Young people are attracted to the spontaneity and freedom of an event that cannot be found in a formal or expected setting something that is discovered through social contacts and may disappear as quickly as it was created. The freedom to have fun, dance and party with their tribe and not under the watchful eye and heavy hand of security or police, is a critical motivator for these events. It’s a low cost high-fun night out, never to be repeated in its exact form each time. There may be an opportunity to engage with this scene, and its organisers, to replicate the essence of the underground into existing venues and locations.

Later closing times would result in younger audiences staying out later. If you are travelling into the City or across greater Sydney the effort both in time and budget is problematic for young people. If they are going to commit to the night, they want the industry to commit to them. Young people are wanting a choice in a night out. Whether it is a night that keeps going to sunrise, or something that wraps up at 12am, young people want to choose how their night out evolves. They believe that if there were later closing times more people would go out to enjoy the entire night through to the morning, not just to midnight when most venues close but of course transport and safety would need to support this to be successful.

Finally, how do younger audiences find out what is on? There is no single platform that brings together everything that is on. Most talked about getting intel from friends and social media, but all expressed frustration on missing out, you had to be in the know, to know what was on. Many spoke about the role that artist and venue can play in co-promoting events to widen the net so more people are ‘in the know’. Larger platforms currently available are too commercial and focused on tourism or families. They are seeking real experiences that are local, celebrating local talent.

The summation was that the industry needs to invest time and effort into better understanding a youth market, know your audience, it’s diverse and let’s make a night out for the entire night not just before midnight.

## 9 IN 10 YOUNG PEOPLE ARE ATTENDING CULTURAL EVENTS AND MANY ARE EAGER TO SUPPORT THE ARTS.

The latest data shows that young audiences are the most active of any age group, with 9 in 10 (88%) audiences under 25 attending in-person cultural activities recently.

## YOUNG PEOPLE ARE PARTICIPATING IN MOST ACTIVITIES MORE THAN OLDER AUDIENCES

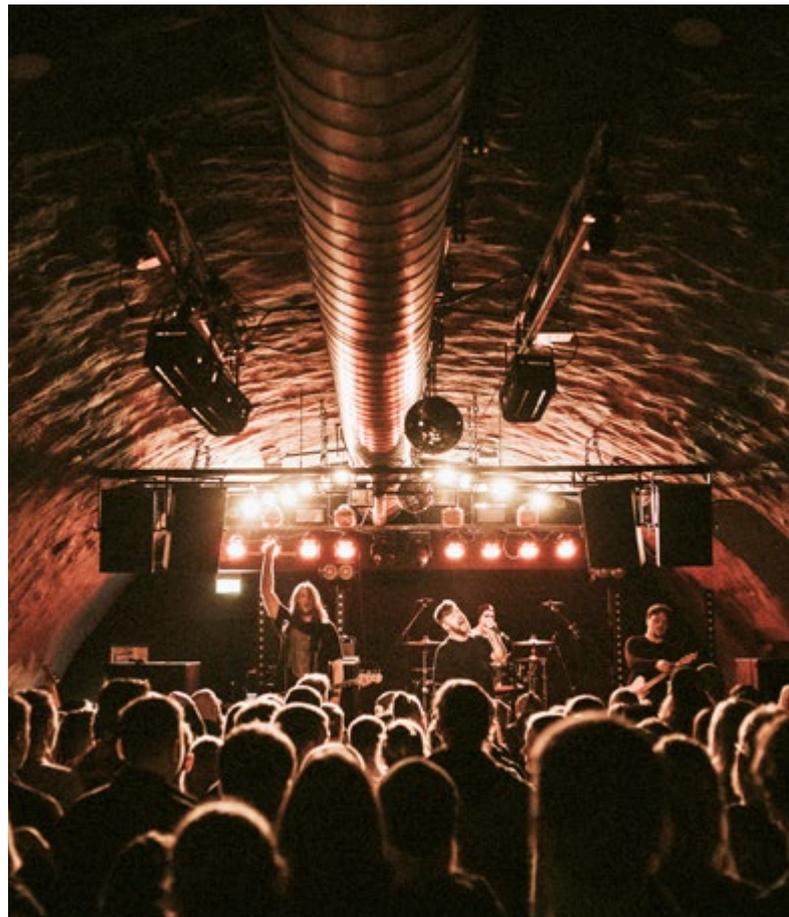
— particularly live performance (53% of those aged 16-24, compared to 46% generally).

## TWO-THIRDS OF YOUNG PEOPLE AGED 16-24 (64%) AND 25-34 (63%) SAY THEY ARE 'READY TO ATTEND WHENEVER PERMITTED'

— rates that are slightly higher than audiences generally (59%).

Comments from young audiences reveal that **TWO YEARS OF MISSED OPPORTUNITIES HAS HEIGHTENED THEIR APPRECIATION FOR THE ARTS** and many are eager to support artists and cultural organisations in the recovery from the pandemic<sup>13</sup>.

The NTIA will continue to engage with young people to help inform and influence the NTIA's priorities going forward and to support the industry to diversify its offerings. Most importantly the NTIA will now open a Board position to an under 30 year old who is passionate about their after dark culture to ensure we have a consistent and strong voice at the table. The NTIA is committed to hearing and learning from the next generation and will also form a Youth Advisory Committee composed of an under 30 year old board member and other under 30 year old participants, they will meet regularly, feature in webinars and networking events and be available to the NTIA membership to test ideas and seek feedback from.



**“There is simply no transport access. If you live in the western suburbs, if you live in the far south or the far north, it's just not possible for you to go to the CBD where every cultural facility happens to be, which sucks. And I think there's two prongs of that solution, which is: more transport for people in western Sydney to get to the CBD, but also more facilities in those areas themselves because you know, western Sydney is a cultural powerhouse... that needs its own venues in their own suburbs and to be allowed to flourish and have a nightlife of its own”**

Maleeka Gazula

# RECOVERY AND REINVENTION

What post COVID conversations have confirmed and amplified for the NTIA is that the next 24 months are critical to the long-term future of the night time industry.

The ongoing long-term critical issues of transport, safety and affordability remain at the top of the list. Only the government can resolve the delivery of late-running public transport that is safe, affordable and reliable for consumers and night time workers. We only need to look to our counterparts in London, Amsterdam and Chicago for clearly communicated transport and safety solutions and programs for inspiration. Removing these hurdles, coupled with continual regulatory reform will allow Sydney's night time economy to flourish and be truly hat of a global city.

This is a once in a generational opportunity to think differently and find new ways of delivering night time culture. Working with key government agencies is going to be more critical than ever to ensure a dynamic and sustainable night time culture can exist. Industry must have continuous improvements to the regulatory environment and clear narratives that are maintained and consistent to instil consumer and industry confidence. This will ensure that our cultural and creative communities are supported through the provision of space and regular and professional engagement.

The Recovery Brunch, the Time Out Survey and the Missing Voices event all led the NTIA to identify three core priority areas for governments and industry in the years ahead.

## NIGHT TIME INDUSTRIES RECOVERY ROADMAP | PRIORITIES

The NTIA's mission is to rebuild, protect and grow the night time experiences and industries of NSW - encompassing providers and supporters of hospitality, art & culture, retail, events, and performance. We represent these industries collectively - we advocate, we educate, and we collaborate to support growth and innovation in the Night Time Economy. We embrace the voice of our younger audiences.

We cover the entire night out.

<b>ONE</b>	<p><b>RESTORING CONSUMER AND INDUSTRY CONFIDENCE</b></p> <ul style="list-style-type: none"> <li>• Investment and actions to boost consumer and industry confidence in the night</li> <li>• Better and more creative infrastructure as well as better facilitation of culture in venues</li> <li>• A night time economy that allows NSW to be seen as the place to host world premieres</li> <li>• A coordinated approach from government and industry to realise the potential of the night time economy</li> </ul>
<b>TWO</b>	<p><b>EMPOWERING INDUSTRY TO PURSUE NEW WAYS OF DOING BUSINESS</b></p> <ul style="list-style-type: none"> <li>• Increase levels of Government support to industry to innovate on existing business models</li> <li>• Increase and diversify creative content in venues</li> <li>• Recognising the importance of young people to night time industries and a city's vibrancy</li> </ul>
<b>THREE</b>	<p><b>CHANGING THE NARRATIVE ABOUT THE NIGHT</b></p> <ul style="list-style-type: none"> <li>• The night must be proven to be safe, vibrant and appealing</li> <li>• Night time industry stakeholders must be on the same page</li> <li>• Promotion of greater Sydney's nightlife must be locally relevant and targeted</li> </ul>

# PRIORITY #1

## RESTORING CONSUMER AND INDUSTRY CONFIDENCE

### WHERE ARE WE NOW?

After more than two years of shut downs, restrictions, major adverse weather events and an increasingly unstable economic environment, the night time industries face great challenges.

Community expectations and consumer patterns have radically changed in response to cancellations, restrictions, closures, staffing issues, reduced public transport and rising cost of living pressures. In 2022, people are more wary of spending money on big events that they may not be able to attend. Bookings are being made closer to the event, leaving businesses less able to plan. The night time industries face greater than ever competition from 'at home' entertainment' and the problem of how to entice out an audience that is now used to staying in for the night.

We know, too, that transport issues, policing strategies, and safety concerns are also affecting consumer and industry confidence.

Adding to the current challenges, over the years smaller scale cultural, entertainment and hospitality infrastructure has been diminishing relative to the increasing population and the scale of new development across Sydney and regional NSW. A lack of affordable and flexible space inhibits the growth of creative production. Further, a lack of appropriate infrastructure may be inhibiting NSW industry promoters from presenting world premieres of our best local talent's works. Planning for a diverse range of night time/creative infrastructure alongside residential zones is still lacking in new developments - although, the NTIA welcomes the State and Local Government's agenda to embed creative and night time activities in recent planning legislation and controls<sup>14</sup>.

Despite making a lot of headway in the last two years with legislative changes to the Liquor Act, there are still barriers to presenting live music and other creative content in venues, including managing sound complaints. Regulation and administrative processes are still hampering business in hospitality and hotels.

### POLICY CONTEXT

The night time industries make a huge contribution to the State's economy. According to research undertaken by Deloitte<sup>15</sup>, the value of the night time economy in Greater Sydney alone in 2017 was \$27.2 billion, supporting 234,000 jobs, and with an estimated \$16 billion in potential economic uplift and associated jobs creation. In 2021, the 24-Hour Economy Commissioner was established to coordinate and implement the NSW Government's actions under the Sydney 24-Hour Economy Strategy, which aims to ensure the continued growth of our industries in Sydney. The night time industries are affected and regulated by various government agencies' legislation and policies - transport, fair trading, health, planning, local government, liquor and gambling, arts and culture, investment, police, property and placemaking - and the 24-Hour Economy Commissioner acts as a central point of contact for inside and outside government.

The NTIA celebrates the achievements of the Commissioner over the last year and the legislative changes in NSW that have made it easier to do business in recent times. We now have more outdoor dining, better regulations for live music, COVID-19 relief packages, and a general move to embed the night time industries' activities in our communities through planning and education measures. Local Government is also on board, with many developing their own night time economy strategies in readiness to take advantage of new investment by the State Government.

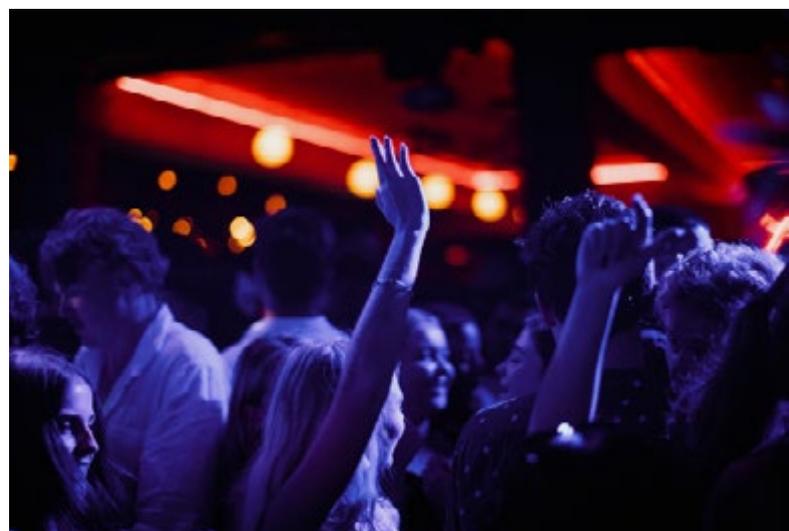
In 2020, the NSW Government passed the Liquor Amendment (24-hour Economy) Bill 2020 (Bill), which makes amendments to the Liquor Act 2007 (and several other Government acts, regulations and policies). The Bill aims to encourage live music, arts/cultural events and small bars, and improve licensing arrangements. The four main changes it establishes are: providing an integrated demerit points and incentives scheme; providing for 'Cumulative Impact Assessments' for social impact (replacing the old Liquor Freeze); regulating the same day delivery of liquor; and aligning Liquor Licensing & Planning laws and promoting live music. Of particular significance, the Bill allows local governments to create Special Entertainment Precincts in which they - not the NSW Government - regulate amplified music. The Bill also allows for low impact performance of music or arts in an existing building not in a residential zone.

On a broader policy level, NSW Treasury's *2040 Economic Blueprint* aspires to have NSW recognised as a standout destination for cultural tourism, major events and creative industries, and as a showcase of global content ranging from screen production to major cultural events. Regional NSW's *20 Year Economic Vision* outlines the priorities for the economic development of the regions, singling out the night time industries as a means to activate town centres. Destination NSW's *Visitor Economy Strategy 2030* has numerous actions to support the night time industries with the aim of increasing the visitor economy across the state. A central pillar in this Strategy is investing in world-class events.

At the local level, the City of Sydney's OPEN Sydney Strategy and Action Plan 2013-2030 is their vision for the long-term development of Sydney at night. The City's strategy addresses the interests of all stakeholders – the resident population, local business owners and visitors to the City. This important piece of work paved the way for updated planning controls to ensure a viable Sydney nightlife into the future. The new controls represented some of the biggest changes to city planning in a decade.

In October 2017, Council endorsed An Open and Creative City: planning for culture and the night time economy discussion paper for public exhibition. The discussion paper was prepared in response to actions in the City's *OPEN Sydney Strategy and Action Plan*, *Creative City Cultural Policy and Action Plan* and *Live Music and Performance Action Plan*. The Open and Creative planning reforms aim to reactivate the night time economy and remove regulatory burden from shops and businesses wanting to trade later, provide alternative venues for small scale cultural activities, and allow a greater range of creative uses in local centres and in Erskineville Town Hall.

Recognising that live music venues and licensed premises are integral part of the character of the Inner West Local Government Area, the Inner West Council facilitated solutions through mediation to ensure the longevity of live music venues and licensed premises whilst protecting the residential amenity of the area. Inner West Council has announced that they are looking at the underutilisation of seven of its town halls and hoping to open them up to live performance and rehearsals to address the city's arts accommodation crisis. Maximising the use of council-owned assets for its creative community is a priority of Council's four-year cultural strategy – *Creative Inner West 2022-2025*. Sydney Fringe Festival has been granted the old Marrickville Town Hall as its headquarters, with future plans for live music in the basement of the 100-year-old community hall. Newtown Town Hall will become the Newtown Pride Centre with additional audits being undertaken on town halls in Leichhardt, Annandale, Petersham, St Peters and Balmain.



## WHERE DO WE WANT TO BE?

Stability for the night time economy in the face of the changes COVID-19 has brought is critical. To restore consumer and industry confidence in the night time economy the following core matters must be addressed:

### **Investment and actions to boost consumer and industry confidence in the night**

- Direct collaboration with government to explore and implement initiatives to improve confidence among consumers and businesses to explore night time offerings.
- Reliable, safe and late-running transportation across greater Sydney to encourage patrons of night time operators to stay out later.
- An environment where the community and night time industry staff feel safe by addressing the tensions created by police presence with a strategy that is more focussed on safety promotion and harm minimisation.
- To reduce the spread of respiratory illnesses amongst staff and patrons, businesses need help to improve their venues' air quality and more opportunities for outdoor (and weatherproof) activities.
- Urgent investment in training and initiatives to make a career in night time industries an appealing pathway. This will provide a longer-term solution to skills shortages challenges.
- Support for planning and new business models.

### **Better and more creative infrastructure as well as better facilitation of culture in venues**

- More spaces that can host a diverse range of informal and formal cultural activities, hospitality and entertainment, including ones that are affordable and cater to new and younger audiences.

- Night time industries must be embedded in large scale government and private developments; residential zoning should accommodate multifunctional spaces for culture, hospitality and entertainment. The cultural and economic value of night time life and its contribution to the unique characteristics of a neighbourhood must be reflected in planning decisions.

### **A night time economy that allows NSW to be seen as the place to host world premieres**

- Australian artists should be encouraged to host world premieres of their work in NSW instead of taking the work abroad for its launch.
- Small scale live music and performances should not require approval processes. Where they do exist, they must be simpler to navigate.
- Agreement across all vested stakeholders to activate spaces that are dormant at night, such as warehouses, factories, shops, and public sites to host events.
- Venues should be more affordable, accessible and night time operators should be empowered to host creative content.

### **A coordinated approach from government and industry to realise the potential of the night time economy**

- Continued monitoring, reporting and analysis of the regulatory issues to better communicate progress and identify roadblocks.
- Consistent two-way communication between Government and industry on regulatory changes that impact how night time industry vendors operate.
- Coordinated investment and support from government to enable industry to navigate changes and capitalise on new opportunities.
- Young people need to be at the table at all levels to help shape and participate in our night time culture.

# CASE STUDIES

## **SOUTH X SOUTHWEST SYDNEY**

In June 2022, Destination NSW announced that the world's most iconic futurist conference and festival, South by Southwest® (SXSW®) will expand outside of North America for the first time ever to bring its renowned celebration of creativity and innovation to Sydney, Australia from Sunday October 15 to Sunday October 22, 2023.

SXSW Sydney will gather the world's most inspired thinkers, creators and innovators for an agenda-setting exploration of the best in Music, Screen, Gaming, Technology and Innovation. SXSW Sydney will be 2023's must-attend event for those seeking to discover and shape future trends, emerging technology, and access unrivalled international networking opportunities. Over 1000 sessions, screenings and performances, activations and parties across the city. SXSW Sydney will become the official annual Asia-Pacific instalment of SXSW® ([www.sxsw.com](http://www.sxsw.com)).





## **TAKE KARE Stay Kind (Thomas Kelly Youth Foundation)**

Take Kare is a night-time safety program run by the charity Stay Kind (formally called the Thomas Kelly Youth Foundation) with the aim ‘to get all our children home safely’.

The program provides ‘Take Kare Safe Spaces’ in the city for young people who are in need of help at night. Take Kare Ambassadors (who are largely volunteers) work in teams to operate the safe spaces, handing out water and providing first aid if needed, helping with directions and getting people to public transport, charging phones and reconnecting friends. They also provide specialised support for drug and alcohol intoxication, injury and mental health.

According to Stay Kind, more than 73,000 interventions have been made since the program began. A 2019 evaluation showed that between 2014-2019, the benefit of the program to the community, through saving lives and averting serious harm, was valued at \$7.46 million.

The program was on hold during the lockdowns of 2020 and 2021, but it now has a Safe Space stationed at Sydney Town Hall from 10pm to 4am Friday and Saturday nights, plus New Year’s Eve. It has also just trialled a Safe Space at The Rocks and plans to reopen its Darling Harbour Space soon.

The City of Westminster in London has recently implemented a similar initiative known as the Night Stars, which engages night-time safety volunteers in prominent hot-pink ‘high vis’ vests to help night-time revellers across several locations in London.

# PRIORITY #2

## EMPOWERING INDUSTRY TO PURSUE NEW WAYS OF DOING BUSINESS

### WHERE ARE WE NOW?

COVID-19 has changed the night time economy and it's not business as usual. In response to the pandemic, the NTIA provided advice and resources on new regulations, business rebuilding and relief packages. It launched campaigns, such as Keep Our Venues Alive, Check. Check. Check and Let's Hear It, to protect businesses and educate the community during and beyond the initial crisis.

Industry is now at a critical point and operating in a less stable, rapidly changing environment. Not only have consumer expectations and behaviour patterns changed, many businesses cannot find suitable staff, have much higher operating costs and problems with supply chains. To survive and grow, our industries need to innovate and adapt their business models.

Changes to consumer demands have led to many patrons looking for more than just food and beverage service. Increasingly, people want a 'value-added' cultural experience, something unique and different from their at home entertainment. However, frequently the true cost of presenting a cultural event is not reflected in its price as artists heavily subsidise their productions with free labour. Post COVID-19 and with increasing economic pressures, the margin for businesses and creative workers has shrunk even more.

Feedback from industry indicates there are practical barriers to presenting, hosting and commissioning creative content. Expensive and complex regulations for live performances, financial risk, limited connections to creatives, lack of appropriate technology and staff inexperience can all stand in the way of increasing revenue with creative content.

There have also been changes in NSW's demographics and movements across the state. This includes people moving from the city to regional NSW, people staying local and frequenting Sydney's CBD less and the number of 'millennials' in Australia overtaking the 'baby boomers'. Further, the proportion of people who have at least one parent born overseas has increased in recent years.

Attracting a younger audience, a unique group that has come of age during lockdowns and enjoys socialising online, must be a priority for our industries. Currently, this group is the most likely age group to be attending events. The main barriers young people face to going out at night are cost, transport and safety. This audience wants greater diversity of entertainment and curated experiences, including ones that are socially conscious, highly contemporary and are not so focussed on alcohol. Some report experiencing tensions with security and police, and some say they enjoy less commercial-feeling, intimate environments; both of these trends might be fuelling what we know is a thriving underground event scene.

### POLICY CONTEXT

Like the other priorities, the *Sydney 24-Hour Economy Strategy* is the key document for consideration here. Taken as a whole, the Strategy sets the agenda for our industries in Sydney, but many of its themes are relevant to regional areas. It has various actions that aim to support businesses to diversify, encourage more cultural events and activities, increase the number of flexible and affordable spaces, and retain talent and innovation.

New initiatives - such as the UpTown program, Special Entertainment Precinct Planning, Local Area Acceleration Toolkit for councils - are being rolled out to ensure night time activities are in the mix, including in regional NSW.

The 24-Hour Economy Commissioner also has an eye on revitalising Sydney's CBD (see EY's Flicking the Switch paper). Possible actions include providing new offerings that drive demand (e.g. 24-hour food market, a major e-gaming venue) and encouraging sustained activation events such as campaigns that emphasise a place's 'personality'. Attracting young people to the city is a priority.

Other key relevant policies include: the NSW Government's Industry Development Framework, which nominates the visitor economy as a priority industry and discusses interventions in areas such as workforce training, global marketing campaigns to drive demand, and support for innovation in business; and Destination NSW's Visitor Economy Strategy 2030, which outlines numerous actions to support night time industries with the aim of increasing the visitor economy.

The NTIA and Time Out recently conducted a survey to better understand audiences' attitudes to nightlife and music post lockdown. This data and other fresh research by the Patternmakers for the Australia Council for the Arts, along with targeted consultation we undertook with young people has helped us to understand some of the community's current preferences for entertainment and patterns of behaviour.

## WHERE DO WE WANT TO BE?

Night time industries have already demonstrated exceptional resilience and ingenuity during the COVID-19 induced lockdowns. To ensure the sector remains resilient to the changing landscape industry and government must address the following priority areas:

### **Increase levels of Government support to industry to innovate on existing business models**

- Government led support to industry to foster confidence to innovate on existing business models and develop new models.
- Facilitation of partnerships and collaborations that encourage innovation and reduce the burden of risk on operators.
- More investment in precinct-based and city/town wide activations to give new life to the night time economy. This includes more high-profile campaigning to drive consumer engagement and participation.

- A range of government and private sector support is needed, including planning and zoning for night time venues' regulatory improvements' subsidies for street closures, traffic management and security, better transport options and improved safety strategies.
- Explore best practice models in other industries such as technology or screen that could be implemented into the night time industries.
- Innovative ideas from our night time workers should be rewarded and promoted.

### **Increase and diversify authentic creative content in venues**

- Expand upon the types of creative content within night time industry venues to include artist designed spaces, activating a site through public art performances, curated programs and festivals, comedy, placing small theatre spaces in pubs, visual arts exhibitions and classes, and innovative pop-up events.
- Partner and collaborate with the cultural and creative industry leaders to enhance programming opportunities.
- Our business models need to ensure creatives are paid appropriately for their work, and our workers need the skills, infrastructure, appropriate regulatory environment, and connections to produce and present new content.

### **Recognising the importance of young people to night time industries and a city's vibrancy**

- Recognition of the concerns of young people through industry led initiatives and forums.
- A framework that supports venues to deliver a diverse range of experiences that place accessibility and affordability front and centre.
- Implementation of a policing and security strategy that is less confrontational and more centred on safety and harm minimisation.
- Industry support and career pathways for young night time economy workers to pursue a career in the sector.

# CASE STUDIES

## SUPPER SESSIONS

On the last Sunday of each month, Anna May Kirk and friends set the table for a big, delicious, celebratory feast. Each time they welcome a different chef to cook up a three-course vegetarian meal on the sunny rooftop of 107 Projects in Redfern, Sydney. The \$ from each ticket is pooled into a \$1,000 independent grant – awarded to an artist on the night of the dinner to kick start a creative project. The vibe is collective joy, deliciousness, laughter, sharing, supporting one another and creating better futures, together. ([suppersessions.com.au](http://suppersessions.com.au))





## **REPURPOSING EXISTING VENUES**

### **Community Town Halls**

In 2021, the City of Sydney, through its Creative City Reforms, ensured underutilised venues like Erskineville and Glebe Town Halls are now used for creative and live performance use.

In 2021, Inner West Council announced plans to repurpose seven of its mostly empty old town halls into vibrant creative hubs. It is calling on the state government to remove the need for formal council approval to hold small-scale performances and rehearsals in spaces like these.

Council believes if the process was made easier, in weeks there would be a flourishing of creative activity in all sorts of temporarily dormant venues - including ones that are empty at night or on the weekend, such as shops, carparks, factories and warehouses.

Sydney Fringe Festival now calls the 100 year old Marrickville Town Hall home with new office space and is planning to use the hall for its original purpose of live music and performance.



## **PUBLIC AND PRIVATE PARTNERSHIP** **City of Sydney Creative Studios**

Expansive new creative studios in the heart of the city have been developed through a voluntary planning agreement between the City of Sydney and developer Greenland Australia, as part of their apartment, retail and hotel development in Bathurst and Pitt Streets

Voluntary planning agreements offer developers certain advantages, such as increased height and/or floor space, in exchange for providing assets for the community.

The Creative Studios span 2,000sqm over 5 storeys at 119 Bathurst Street, Sydney, and include a range of professional studio and rehearsal spaces, an artist-in-resident apartment, and a café in the lobby.

Brand X - who manage subsidised workspace and creative development programs - oversees the day-to-day management of the studios on behalf of Council. The Creative Studios opened in mid 2022.

# PRIORITY #3

## CHANGING THE NARRATIVE ABOUT THE NIGHT

### WHERE ARE WE NOW?

Since its inception, the NTIA has gone a long way in promoting a new narrative for our industries, but we still face challenges.

First, there is the persistent perception that it is unsafe to go out after dark. Secondly, without greater coordination of our stakeholders we will not realise our vision of a vibrant night time culture. The night time economy is now on the agenda of governments - both state and local. There is funding and initiatives to activate precincts, streets and venues. However, NTIA members report that the government does not always effectively promote regulatory improvements or funding opportunities, and its overarching goal of supporting the night time economy can be undermined by the conflicting policies of individual agencies (for example, complex approval processes, on the ground policing practices and inadequate transport at night).

Thirdly, we need to be adapting to the changing modes of communications and understanding the role of traditional media in promoting the night time industries. With the decline of street press, it is harder for some audiences to discover what's on and where to go. On the other side, businesses have varying levels of capacity to reach younger audiences, who are more likely to use social and video platforms rather than traditional written form promotional material. Our research also reveals that many young people want a central portal listing events and venues.

Finally, night time industry work - which employs large numbers of young people - can lack social esteem, profile and career progression opportunities.

**If you live about an hour away from the city and the last train is at 1am, you kind of have about a thirty-minute period of time where you need to get all your friends together because you're not going home alone, it's not so safe.**

**So, it limits the amount of time you can spend in the city and limits the amount of money you could probably spend in the city as well, because you've got that thirty minute buffer on each direction where you can't actually spend time having fun. It's just time to organise and get home as soon as possible.**

**And if you miss the last train, you're screwed. You have to catch the bus and it's just not as safe. And then, yeah, it kills the vibe."**

Twenty year old from western Sydney

## POLICY CONTEXT

Changing the perception of night time life is on the NSW Government's agenda. The 24-Hour Economy Commissioner is responsible for delivering actions under the *Sydney 24-Hour Economy Strategy's* central pillar of 'Changing the Narrative', including the 'Neon Grid' project under the *Smart Places Acceleration Program* and promoting Sydney as a vibrant global destination.

The Commissioner's 'Safety, Wellbeing and Mobility Group' coordinates the work of NSW Police, NSW Health, Transport for NSW and other government agencies.

Improving mobility is a priority in several relevant government policies. For example, in planning for better places through the Greater Cities Commission's *Six Cities Strategy and Metropolis of Three Cities*, to improve productivity through Treasury's *NSW 2040 Economic Blueprint*, and increase visitation across the state through Destination NSW's Visitor Economy Strategy.

Regional NSW has a different set of issues for mobility that are outlined in *Regional NSW's 20 Year Economic Vision*. Priorities here include rail and road upgrades, more services between regional centres, more public transport options to regional centres from surrounding towns and properties.

Also relevant to this priority is Destination NSW's work to promote NSW's hospitality, entertainment and cultural offerings and the Greater Cities Commission's *Greater Sydney Women's Safety Charter*.

## WHERE DO WE WANT TO BE?

The way the night time ecosystem is perceived by both Sydneysiders and those from afar is a crucial factor in how effectively the night time economy recovers. Creating a positive narrative centred on clarity, consistency and grounded in a sense of city-based pride is important. There are important facets that government, industry and stakeholders must address:

### **The night time must be proven to be safe, vibrant and appealing**

- Government must provide public transportation that runs later. Late-running and readily available public transport is an important element in the narrative about a safe city. People must feel that they can safely get home at any point of the night.
- Industry and government must collaborate on harm minimisation strategies at night and ensure these efforts are communicated to a wide array of night time patrons.
- Women's safety at night should be a priority area for government and industry collaboration. Young women who participate in the night time economy should be consulted about their experiences and insights.
- Digital technology, media platforms and communication channels should be explored as avenues to drive awareness of activities at night.

### **Night time industry stakeholders must be on the same page**

- Clearer communication of the vision and priorities for the night time economy must be delivered across all government agencies to ensure frontline workers understand and work towards the collective goals for the night time economy.
- More consistent communication from government about legislative changes, planning and initiatives that affect night time industries.
- Industry collaboration and knowledge sharing to ensure best practices, innovations and understandings are communicated across the industry.

## Promotion of greater Sydney's nightlife must be locally relevant and targeted

- Implementation of government supported, industry led campaigns to promote Sydney's nightlife to local residents in a manner that is authentic and appealing.
- Adoption of more media formats and platforms to appeal to a younger and more diverse audience.
- Recognition of greater Sydney's diverse communities focusing on and promoting the wide array of night time activities that do and do not involve alcohol.
- Greater collaboration between major events and night time operators to provide cross-promotional support.

**Kings Cross used to be really packed and like you would never feel unsafe there because there were so many people around.**

Thirty year old



# CASE STUDIES

## SYDNEYMUSIC (SYDNEYMUSIC.NET)

Jo Hardy, Will McKinnon and Caitlan Welsh saw a gap. As a direct response to the treacherous impact on Sydney's live music scene during lockouts and lockdowns this new gig guide has risen from the ashes. Scroll through the gig guide and you'll almost certainly find a venue or two that you might not have heard of before, let alone been to. Drinking holes you know and love are working behind the scenes to see if they can carve out a space for performance. People who turned 18 during lockdowns are now 19 and 20 and rolling up to their third-ever live show with wild-eyed joy.

Beyond the primary purpose of telling people where and when live music is happening, according to the creators, the content of SydneyMusic.net will be composed of things that need to exist: how-to guides for putting on gigs, recommendations of artists or venues that deserve extra attention, documents of beautiful and vital moments, and informed analysis of problems facing the city and its scenes and the people who make up the city and its scenes.



## AUSTIN, TEXAS

### The Live Music Capital of the World

Austin, Texas is known all over the world for its live music scene. It has hundreds of venues - the most per capita in the US - that host every conceivable music genre.

The city's strong tradition of live music started as early as the 1800s. However, the scene really began to flourish in the 20th Century with now iconic venues, such as the Skyline Club, showcasing the world's biggest country music stars. Austin famously produced a new sub-genre known as 'progressive country' in the 1970s, but it is also renowned for hosting some of the most prominent blues, jazz, folk and soul musicians of the last century.

Today, Austin is home to thousands of musicians and live music is played not just in clubs and bars but in public places all over the city, including restaurants, parks, shopping centres - even petrol stations and the airport. The city is also famous for its music festivals, the biggest of all being South By South West (SXSW), a massive annual contemporary music and cultural festival that is expanding to Sydney in 2023.

There is a general culture of support for live music in Austin and recognition of the economic advantages the industry brings, which in 2024 is projected to exceed the pre-pandemic figure of US\$27 billion globally (see *PwC - Global Entertainment and Media Outlook 2022-2026*). Austin City Council markets live music as a primary attraction for potential visitors and the Austin Music Office promotes local musicians and bands.

The city's reputation continues to attract talented musicians from all over the world. The strength of the industry in Austin means artists can make a living from their work, and new musicians can be nurtured and given opportunities not available in other places.

## **FORTITUDE VALLEY, BRISBANE**

### **Special Entertainment Precinct**

Fortitude Valley in Brisbane is a popular late-night entertainment district that is known for its vibrant live music scene. The suburb, which lies immediately northeast of the Brisbane CBD, has lots of music venues, ranging from bars, pubs and clubs to the Fortitude Music Hall, a large ballroom/theatre style space. Its most famous venue, The Zoo, is one the longest-running live music venues in Australia. The Valley - as it is colloquially known - also features a mix of hospitality and retail businesses, and residential buildings.

The Valley was the first Special Entertainment Precinct set up in Australia. This means that, in certain areas in the suburb, entertainment venues are exempt from the amplified music noise requirements of the Queensland Government's liquor licensing laws. Instead, Brisbane City Council is responsible for regulating noise levels through its Amplified Music Venues Local Law. Music-noise and development laws in the precinct protect music venues from having to reduce noise when a new residential development is built nearby. The onus is on new developments to better insulate their dwellings.

The QLD Government and Council recognise the Valley's live music scene's contribution to Brisbane's culture and economy, and according to Council's research, there is broad community support for the growth of live music in the precinct.

In 2020, the NSW Government introduced legislation that made it possible for councils in NSW to establish Special Entertainment Precincts and, in 2021, Enmore Road and Enmore Theatre became the first one in the state. Inner West, City of Sydney and Lake Macquarie councils are all part of a trial Government program that will support councils to set up these Precincts.

**Ok, everywhere across Sydney is growing, it's always been about low density but...all these new high-rise developments are coming, we've got new trains coming across the city, this is the chance to actually put the nightlife in and have the infrastructure built so the local communities can go to these places. Because these new developments will most probably be set for the next 50 years... so let's get it done now. Like we've never had a better chance to do it."**

Twenty year old Sydneysider

**This was awesome, we never get asked what we think, no one cares what we want."**

Twenty year old Sydneysider



# PARTICIPANTS

## SPIEGELTENT POST RECOVERY BRUNCH

Chris Tooher, Sydney Festival

Ebony Williams, Sydney World Pride 2023

Sarah Norris, Broadsheet

Alicia Talbot, Blacktown Arts

Libby Harris, City of Sydney

John Whelan, Inner West Council

Matt Levinson, Committee for Sydney

Roger Gatchalian, 24hr Commissioners Office

Ben Pike, Daily Telegraph

Emily Collins, Music NSW

Andrew Taylor, SMH

James Boyce, Grumpy Sailor

Tamsin Rose, Guardian

Jane Slingo, EMC

Suz Tucker, Concrete Playground

Michael Betteridge, NRMA

Geoff Parmenter, Sydney Western  
Harbour Business Improvement District

Alice Hatton, Performing Lines

Tim Jones, Seymour Centre

Paula Lamproglou, Sydney Airport

Lana Murphy, Markham

Lauren Conceicao, Property Council

Michael Tuck, Colliers

Michael Berman, Little Pearl Landlord

Manuela De Rossi, Lendlease

Jacqui Stanton, Lendlease

Andrew Wardle, Wardle

Uma Springford, CBUS

Laura Nickson, Dexus

Eddie Giraldo, Dexus

Sally Dare, Colliers

John Wardle, Live Music Office

Amilya Harris, Darlinghurst Theatre

Lissa Twomey, Bangarra Dance Theatre

Sue Donnelly, Belvoir Theatre

Enid Charlton, Carriageworks

Kip Williams, Sydney Theatre Company

Greg Khoury, Century Venues

Si Philby, Owner/ Operator  
Berrima Vault House

Timo, GM Clare Hotel

Evan, Right Angle Studio

Kieron Hunt, GM Ovolo Woolloomooloo

Nathan, Elastic Studios

Nick Cummins,  
Sydney Living Museums board member

Dane Gorrel, Club 77

Carly Roberts, Picnic

Graham Cordery,  
Soda Factory - Experience Group

Mark Crollini, Solotel

Stephen Speed, Sydney City Liquor Accord

Oscar McMahon, Young Henrys

Dan Hampton, Young Henrys

Tom Green, Diageo

Olivia Kerr, AHA NSW

Josh Landis, Clubs NSW

Dean Ormston, APRA AMCOS

Stephen Wade, Australian Live Music  
Business Council and Select Music

Sue Proctor, Create NSW

Millie Millgate, Support Act/ Sounds Australian

Paul Nicolaou, Business Sydney

Anthea Williams, Australian Chamber of  
Commerce and Industry

Leigh Harris, Surry Hills Business Chamber

Karl Schlothaur, Independent Bars Association

Michael Hodgson, Entertainment Quarter

Sam Shaw, Secret Sounds

Pasan Wijesena, Earls and Jacoby's

Joe Muller, Vivid/Mary's

Jamie Toko, AMP Capital

Justin Newtown, Hinchcliff house

Justine Baker, NTIA

Julie Turpie, DNSW

Kenny Graham, Mary's Group

Kerri Glasscock, Sydney Fringe Festival

Rennie Addabbo, SONOS

Nicholas Pickard, APRA AMCOS

Kylie Moncour, Australian Venue Co

Greg Holland, Spirits and Cocktails

Bill Harris, Maritime Museum

Emily Crocker, Art Gallery NSW

Marcus Chang

Marlon Kogonya

Bernie Dieter, Creative

Tom Velick, Deadman Touring

Amanda Choularton, Freelance

Ana Narvaez, Media

Jo Steuart, Applejack Hospitality

Ash Nicholson, CBRE

# THE MISSING VOICE: MARY'S UNDERGROUND

Arron Singh

Ifeoma Obiegbu

Isabelle Knevett

Bianca Lau

Jayesh Joshi

Jenisha Maharjan

Callum Vittali-Smith

Justine Simpson

Matt Landi

Claire Wastell

Megan Bentley

Megha Sevekari

Euan HartNayonika Bhattacharya

Peter Owen

Hannabeth Marchant

Ravina Mane

Samuel Austin

Tess Wait

Shira Bindiganavile

Jasper

Sudai Padki

Edwina Stoire

Maleeka Gazula

Jack Colquhoun

Tessa Lockwood

## WITH THANKS

City of Sydney

Alex Bowen

Andrew Coward

Sydney Fringe Festival

Matt Levinson

Daria Grove

NTIA

Larry Galbraith

Naomi Jacobs

Libby Harris

Emily Crocker

Jo Chichester

Time Out

Mary's Group

Four Pillars

Young Henrys

Leonie Hancock

Aliza Denenberg

Tony MacGregor

Grace Houw

Elastic Group

# APPENDICES

## POLICY STRATEGY

Sydney 24-hour Economy Strategy - NSW Treasury - 2020

*Sets the NSW Government's agenda for night time economy in Sydney*

Year in Review - NSW Office of the 24 Hour Economy Commissioner - March 2022

*(Progress updates in ORANGE)*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<ul style="list-style-type: none"> <li>• <b>Key outcome:</b> Anchor what is most important: a framework to continually engage with industry and the community to overcome the biggest barriers to success p.13</li> <li>• <b>Action 2:</b> 'Neon Grid' map of existing and potential 24-hour districts across Greater Sydney - planning growth p.26 (<i>Smart Places Acceleration Program is developing this</i>)</li> <li>• <b>Actions 8,9,10,11:</b> Enable and support the variable use of under-utilised public and private spaces and buildings to accommodate small-scale live performance, arts and culture events p.34</li> <li>• <b>Action 28:</b> The 24-hour Economy Coordinator General will work with Placemaking NSW and other relevant NSW Government departments to ensure that new Government-led precinct projects deliver a built environment that promotes 24-hour economy activity: for example, through adequate lighting, transport, and activated public spaces) p.54 (<i>Special Entertainment Precincts guidelines and pilot projects starting in 2022. Working to embed 24-hour economy principles into the planning of major precincts (Action 28) such as Tech Central, Westmead Health and Innovation District and the Western Sydney Aerotropolis</i>)</li> <li>• <b>Action 23:</b> Support globally significant events (home-grown and international) p.46</li> <li>• <b>Action 15:</b> Further streamline liquor licensing to support venues p.4 (<i>currently being delivered through a new Fun SEPP + reforms to the Liquor Amendment (Night-time Economy) Act enacted in 2021</i>)</li> <li>• <b>Action 19:</b> Relaxation of restrictions for food trucks and other types of pop-up activations p.44 (<i>currently being delivered through a new Fun SEPP</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• Establishing the <b>24-hour Economy Acceleration Program</b> - supporting council led plans p.2</li> <li>• <b>Action 2:</b> 'Neon Grid' map of existing and potential 24-hour districts across Greater Sydney - precinct creation and promotion p.26 (<i>Smart Places Acceleration Program - funding from Planning to deliver the Neon Grid project</i>)</li> <li>• <b>Actions 16,17:</b> Review live music and noise regulations to maintain opportunities for venues and musicians p.42 (<i>currently piloting Special Entertainment Precincts incl. reform of noise regulations + reforms to the Liquor Amendment (Night-time Economy) Act enacted in 2021</i>)</li> <li>• <b>Action 18:</b> Simplify requirements and improve affordability for creating pop-ups and cultural events p.43 (<i>currently being delivered through a Fun SEPP</i>)</li> <li>• <b>Actions 20,21:</b> Simplify requirements for creating cultural events in public spaces (Global DAs for food, drinks, small scale cultural activity / identify appropriate sites and toolkits for venues) p.45</li> <li>• <b>Action 27:</b> Ensure affordable spaces for creative industries p.52 (dormant spaces pilot)</li> <li>• <b>Action 3:</b> City-wide night-time hub certification program (see UK's Purple Flag scheme) p.27 (<i>will launch mid 2022</i>)</li> <li>• <b>Action 4:</b> Develop and incentivise participation in precinct-based streetscape atmospheres and activations (Main Street Activation Program, night lighting, pilot street and temporary activations) p.32 (<i>Special Entertainment Precincts guidelines and pilot projects starting in 2022</i>)</li> <li>• <b>Action 12:</b> Provide councils with tools and resources to support better activity mix planning p.38 (<i>Local Area Acceleration Toolkit for Councils created</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Key responsibility:</b> 24-hour Economy Coordinator General role to liaise with industry and advise industry on their role in the Strategy p.22 (<i>3 working groups established: 24-Hour Economy Advisory Group; Senior Officer's Group; Safety; Wellbeing and Mobility Group</i>)</li> <li>• <b>Key outcome:</b> Bring together a single plan for industry, councils and NSW Government agencies p.13</li> <li>• <b>Key outcome:</b> Streamline - create singular points of contact and accountability in Govt. wherever possible p.13</li> <li>• <b>Key outcome:</b> Connect - connect all stakeholders and give clear roles and responsibilities to each. Establishes a new 24-hour economy Coordinator General p.13</li> <li>• <b>Key outcome:</b> Drive action - work with subject matter experts to decide what activities are important and possible p.13</li> <li>• <b>Key outcome:</b> Create a more consistent offering - activate a 24-hour experience that is consistent across Greater Sydney, but still distinct p.13</li> <li>• <b>Key outcome:</b> Anchor what is most important - a framework to continually engage with industry and the community to overcome the biggest barriers to success p.13</li> <li>• <b>04 Strategic Pillar:</b> Mobility &amp; improved connectivity (over-and-above measures to improve the safety and movement of people in and out of 24-hour economy hubs) p.55</li> <li>• <b>Action 5:</b> Streamline safety and inspection measures within night-time hubs p.30</li> <li>• <b>Action 6:</b> Expand community and industry-led safety programs p.30</li> <li>• <b>Action 26:</b> Establish ongoing business engagement forums (partnerships with business and community groups) p.50 (<i>Safety, Wellbeing and Mobility Working Group established to bring together NSW Police, NSW Health, Transport for NSW and other key agencies to coordinate activities and promote responsible going out behaviour</i>)</li> </ul>

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
	<ul style="list-style-type: none"> <li>• <b>Action 13:</b> Support and encourage businesses to diversify (Night-time Economy Diversification Grants Scheme - see Acceleration Program) p.38 (\$5m district acceleration program 'UpTown' in late 2021, full roll out planned for late 2022)</li> <li>• <b>Action 14:</b> Extend opening hours across low-impact retail businesses - test cases to encourage a shift in consumer behaviour towards late night patronage p.40 (working with councils - e.g.. Parramatta and Randwick - to promote extension of hours)</li> <li>• <b>Action 24:</b> Activate major sporting precincts with inclusive before and after activities p.47</li> <li>• <b>Action 25:</b> Develop nuanced sub-sector playbooks with industry (for creators, entrepreneurs, pubs and clubs) p. 50</li> <li>• <b>Action 29:</b> Retain and incubate talent in Sydney's night-time industries (promotional caption to attract and retain talented labour) p.54</li> <li>• <b>Action 38:</b> Develop distinct branding for key night-time hubs to communicate the unique value proposition of each p.66</li> <li>• <b>NEW COVID PROGRAMS NOT IN ORIGINAL STRATEGY</b> include - Alfresco Restart Package, Hospitality Super Sunday vaccination drive, Live Music and Performing Arts Support Packages, Good going out behaviour messaging)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Action 30:</b> Extend late-night transport choice and safety (see Transport NSW's Movement and Place Framework) p.56</li> <li>• <b>Action 31:</b> Develop a mobility plan to make it easier to travel between 24-hour economy hubs p.57</li> <li>• <b>Action 32:</b> Implement enhanced parking options for night-time hubs p.58</li> <li>• <b>Action 33:</b> Ensure safe options for end-of-trip connections for workers and consumers of the night-time economy p.59 (supporting the Take Kare Safe Space program, which provides a range of support and assistance to people going out. We are also active participants in the Women's Safety Charter, helping to make Sydney a safer city for women and girls)</li> <li>• <b>Action 34:</b> Initiate an arts program to activate transport links (make transport more enjoyable - Create NSW Metro Public Art Program) p.60</li> <li>• <b>Action 37:</b> Re-align public perception of health, safety and wellbeing within night-time hubs (NSW Police, Health, Justice harm minimization strategy - alcohol culture) p.64 (supporting the Take Kare Safe Space program, which provides a range of support and assistance to people going out. We are also active participants in the Women's Safety Charter, helping to make Sydney a safer city for women and girls)</li> <li>• <b>05 Strategic Pillar</b> - Changing the narrative (supported the launch and roll-out of the NSW Government campaign, 'Feel New')</li> <li>• <b>Action 35:</b> Activate local marketing and promotion of night-time industries via the Neon Grid p.62</li> <li>• <b>Action 36:</b> Re-establish a unifying vision of Sydney as a vibrant global cultural destination p.63 (supported major events such as Global Cities After Dark; Fabrics of Multicultural Australia and REMIX to position Sydney as a significant world city for 24-hour economy)</li> <li>• <b>Action 39:</b> Make the Neon Grid a digital, centralised information platform for all of Greater Sydney's 24-hour hubs(What's On page/ marketing) p.66 (Smart Places Acceleration Program underway)</li> </ul>

# POLICY STRATEGY

Flicking the Switch: Research and insights to help Sydney's CBD turn the lights on a new era - EY for Investment NSW

*Research based recommendations to attract people back to the CBD*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p><b>Placemaking and planning p.11</b></p> <ol style="list-style-type: none"> <li>1. More alfresco dining and green space</li> <li>2. Hospitality pop-up events</li> <li>3. Live art shows, performances and theatre</li> <li>4. More affordable food/drink venues</li> <li>5. maximise capacity of building space</li> </ol> <p><b>Licensing and regulation p.11</b></p> <ol style="list-style-type: none"> <li>1. Possibility of more late night licences in some districts</li> <li>2. Further alignment of planning laws for small bars to align DA with trading hours</li> <li>3. Shared positions on sound policy to provide a definition of 'offensive noise'</li> <li>4. Streamline planning/licensing to activate institutions (libraries, museums, warehouses, carparks) for different uses such as dance parties</li> <li>5. Lower-cost and easier processes for retail like pop-up shops, swaps, markets</li> </ol>	<p><b>Activating the city p.11.</b></p> <ol style="list-style-type: none"> <li>3. Activities that target young people to come into the city for non-work</li> <li>4. Trial a 'City Camp' program for school children and sports clubs</li> </ol> <p><b>Creating demand p.11</b></p> <ol style="list-style-type: none"> <li>3. Trial a 'culture pass'</li> <li>4. Enhance Sydney iVenture Card</li> <li>5. New offerings that drive demand (e.g. 24-hour food market, major e-gaming venue)</li> <li>6. Reinforce the 'specialness' of the CBD through funded promotion</li> </ol> <p><b>Activating the city p.11</b></p> <ol style="list-style-type: none"> <li>5. Encourage sustained activation events such as precinct activation campaigns that emphasise 'personalities' of places</li> </ol>	<p><b>Mobility and access p. 11</b></p> <ol style="list-style-type: none"> <li>1. Encourage use of public transport e.g., subsidised annual passes, later night services</li> <li>2. No increase to parking amenities</li> <li>3. Trial micro-mobility and e-scooters on active transport infrastructure</li> <li>4. Light transport corridors (e.g. Green Square to City)</li> <li>5. Flexible work hours incentives to relieve congestion</li> <li>6. Trial late public transport Thurs-Sat</li> </ol>

# POLICY STRATEGY

Global Cities After Dark: Sydney Future Proofing Report 2021 - Vibelab for City of Sydney and NSW Government - 2021

*Report from the Global Cities After Dark conference held in 2021*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p><b>Major Events &amp; Cultural Tourism Recommendations p. 16:</b></p> <ul style="list-style-type: none"> <li>• Tax and other incentives for private sector investment in culture</li> <li>• Disability Action Plan (for large events)</li> </ul>	<p><b>Hospitality Sector Recommendations p.8</b></p> <ul style="list-style-type: none"> <li>• Buy Local campaign (incl. engaging local creatives)</li> </ul> <p><b>Live Music &amp; Entertainment Sector Recommendations p.12:</b></p> <ul style="list-style-type: none"> <li>• NSW Contemporary Music Strategy (create and implement)</li> <li>• Prioritise cultural precincts and seek to cut the red-tape</li> </ul> <p><b>Major Events &amp; Cultural Tourism Recommendations p. 16:</b></p> <ul style="list-style-type: none"> <li>• Increase pathways for young creatives to be involved in the design and implementation of cultural tourism and events</li> </ul>	<p><b>Live Music &amp; Entertainment Sector Recommendations p.12:</b></p> <ul style="list-style-type: none"> <li>• Establish a collaborative relationship with NSW Police (establish music industry liaison)</li> <li>• Ongoing industry meetings to facilitate collaborative dialogue and actions</li> </ul> <p><b>Transport and Health &amp; Safety Recommendations p.19</b></p> <p>Data informed future transport planning</p> <p>Plan for a permanently changed transport landscape in NSW</p> <ul style="list-style-type: none"> <li>• Prioritise safe journeys home</li> <li>• Placemake transport hubs as community spaces</li> </ul> <p><b>Hospitality Sector Recommendations p.8</b></p> <ul style="list-style-type: none"> <li>• NSW Hospitality Industry Code of Conduct (focus on young people)</li> <li>• Expand the NSW Government's 'Plan B' campaign (young people)</li> </ul>

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p><b>Aspiration: World-class centres of arts and technology p.34</b></p> <ul style="list-style-type: none"> <li>Deliberate and strategic co-location of culture and creative practices within the state's emerging centres of technology and innovation will create vibrant 'live-work-play' environments that attract and retain skilled talent.</li> </ul> <p><b>Lever 5: Innovation p.61</b></p> <ul style="list-style-type: none"> <li>The establishment of mixed arts and technology creative precincts, government incentives to encourage investment in research and development, investment in incubation infrastructure and government acting as a facilitator for collaboration between industry, universities, government and the community.</li> </ul> <p><b>Attractive destination for business p.34</b></p> <ul style="list-style-type: none"> <li>We should be recognised as a standout destination for cultural tourism, major events and creative industries, being a showcase in global content ranging from screen production to major cultural events.</li> </ul> <p><b>Better promotion of 'Global New South Wales' p.66</b></p> <ul style="list-style-type: none"> <li><b>Recommendation 2.5:</b> Develop a revised approach to NSW trade and investment to better promote 'Brand NSW'</li> <li><b>Recommendation 2.6:</b> Better integrate tourism promotion with promotion of Sydney and New South Wales as a place to invest, do business and study.</li> </ul> <p><b>Tourism and the Visitor Economy p.77</b></p> <ul style="list-style-type: none"> <li><b>Recommendation 7.14:</b> Develop programs to build capability and support the diversification of businesses in regional New South Wales to capitalise on growth in tourism, including through nature-based and eco-tourism.</li> </ul>		<p><b>Lever 4: p.61</b></p> <ul style="list-style-type: none"> <li>Ensuring that the transport network and other public services can support a growing population, that the right infrastructure gets build and maintained and that it encourages innovation and world's best practice</li> </ul>

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p><b>PRINCIPLE 6: Recognising each region's strengths and underlying endowments p.47</b></p> <ul style="list-style-type: none"> <li>Options to activate tourism potential based on regional endowments and cultural heritage</li> <li>Opportunities for underutilised public land and infrastructure to play a bigger role in tourism</li> </ul> <p><b>PRINCIPLE 7: Regulation and planning to promote commercial opportunities p.49-51</b></p> <ul style="list-style-type: none"> <li>Improving the customer experience of planning processes for business investment, set-up and expansion in regional NSW</li> <li>Initiatives to attract skilled labour to regions, and increase the participation of women and older people in the regional labour force</li> <li>Potential growth areas (hubs) for targeted industries in specific locations</li> <li>Streamlining regulatory requirements to attract related and co-dependent businesses in engine industries</li> <li>Reviewing planning regulatory settings to create an environment more conducive to attracting income and employment-generating opportunities, supported by local endowments</li> <li>Ensuring initiatives to support small businesses are effectively implemented in regional areas impacted by COVID-19 drought, bushfires and floods</li> <li>Cultural infrastructure investment across regional NSW</li> <li>Investment models to improve recreational infrastructure in growing regional centres, to enhance wellbeing and lifestyles.</li> <li>Planning arrangements in all growing regional centres that ensure appropriate housing, utilities and transport to support growth, while maintaining liveability, sense of community and local identity</li> <li><b>Opportunities to activate regional town centres with growth potential, to support night-time economies.</b></li> <li>Management of coastal land to optimise accessibility and balance commercial and residential uses.</li> </ul>		<p><b>Improved travel between regional centres and from regional centres to international gateways p.41</b></p> <ul style="list-style-type: none"> <li>More day-return services to, from and between regional centres</li> <li>Regional public transport to assist commuters to travel to metropolitan areas and regional centres to access work opportunities</li> <li>Options to improve public transport services to access regional centres from surrounding areas.</li> <li>Rail and road upgrades on lines between regional centres</li> <li>Seamless digital ticketing for public transport within NSW and across borders.</li> <li>Higher-speed rail links between Sydney and regional centres that have Metro Satellite or commuter hub potential.</li> </ul>

# POLICY STRATEGY

The NSW Industry Development Framework - Investment NSW, 2022

*Outlines interventions in industry development the NSW Government will use to stimulate economic growth and foster public benefits.*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<ul style="list-style-type: none"> <li>Nominates the Visitor economy as a priority industry p.6</li> </ul> <p><b>Supply-side interventions p.19</b></p> <ul style="list-style-type: none"> <li>Vocational training programs and higher education to increase pool of skilled workers for specific industries e.g.. the connection between businesses and training providers, enabling businesses to commission skills and training providers to improve the quality of education.</li> <li>Subsidised traineeships and apprenticeships, wage tax credits and training grants can be used to encourage businesses to provide training for their staff.</li> <li>Supplier and value chain resilience and development initiatives p.20</li> </ul> <p><b>Technology p.21</b></p> <ul style="list-style-type: none"> <li>E.g.. Incubators and scale up programs, regulation reforms, R&amp;D and innovation incentives</li> </ul> <p><b>Infrastructure p. 23</b></p> <ul style="list-style-type: none"> <li>Precincts and industrial zones creating productivity benefits</li> </ul>		<p><b>Demand side interventions</b> - Using domestic market levers - State-based marketing and branding campaigns (such as the 'Feel New' campaign) p.18</p> <ul style="list-style-type: none"> <li>'Feel New' is a Destination NSW campaign intended to generate new demand for the NSW visitor economy, in response to the effects of the COVID-19 pandemic restricting access to key international tourism markets. The campaign uses multiple media channels (TV, radio, outdoor, digital and social) to promote and increase tourism into NSW.</li> </ul>

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p><b>Strategic Pillar 3: Showcase our strengths p.42</b></p> <p><b>Emerging strengths</b></p> <ol style="list-style-type: none"> <li>1. New Icons (Western Sydney Airport, Western Parklands City and the Aerotropolis, 24-Hour Economy, new visitor attractions statewide, new event infrastructure, new urban and regional precincts and places)</li> <li>2. Eco-wellbeing</li> <li>3. Accessible, livable, connected cities and regions</li> </ol> <p><b>Strategic Pillar 4: Invest in World-Class Events p.44</b></p> <p><b>Key areas:</b></p> <ol style="list-style-type: none"> <li>1. Venue programming (compelling content to draw in patrons)</li> <li>2. Regional and local events</li> <li>3. Major events</li> <li>4. Business Events</li> <li>5. Global mega events</li> </ol> <p><b>Strategic Pillar 5: Facilitate Growth p.46</b></p> <ol style="list-style-type: none"> <li>1. Regulation and planning reform (Local Govt. responsibilities, regulation and licensing, major event facilitation, planning approvals, land use planning)</li> <li>2. Transport and access</li> <li>3. Visitor infrastructure</li> </ol>	<p><b>Strategic Pillar 1. Road to Recovery p.32</b></p> <ol style="list-style-type: none"> <li>1. Support business (grants, advisory services, customised training, crisis and continuity planning support)</li> <li>2. Drive demand (New Sydney and NSW brand, multichannel marketing, 24-Hour Economy Strategy, New digital assets, funding metro and regional events)</li> <li>3. Restore access (road, air, public transport improvements)</li> <li>4. Develop and grow the visitor economy workforce (needs-based programs, programs that enhance the appeal of a career in the visitor economy, hospitality and tourism skills and service delivery training, quality assurance program, Working Holiday Maker dispersal to regional NSW)</li> <li>5. Infrastructure (planning, funding, investment attraction, streamlined approval processes)</li> </ol> <p><b>Strategic Pillar 5: Facilitate Growth p.46</b></p> <ol style="list-style-type: none"> <li>1. Business capacity (advice, standards, innovation, 24-Hour economy)</li> <li>2. Skills and workforce (future workforce needs, career pathways, visas/migration, taxation and industrial relations)</li> </ol>	<p><b>Strategic Pillar 2: Build the Brand p.34</b></p> <p><b>Key areas</b></p> <ol style="list-style-type: none"> <li>1. Brand perception</li> <li>2. Brand reputation</li> <li>3. Brand identity</li> <li>4. Brand promise</li> <li>5. Brand symbols</li> </ol> <p><b>Strategic Pillar 3: Showcase our strengths p.36</b></p> <ol style="list-style-type: none"> <li>1. Icons and hidden gems (iconic Sydney attractions, secret precincts and places, world class events and festivals, vibrant retail)</li> <li>2. Small town charm (events with personality, history and heritage)</li> <li>3. Vibrant contemporary culture (Living Aboriginal culture, significant cultural infrastructure, art/music/screen/live performance, LGBTQIA + culture and events)</li> <li>4. World-class food and drink (from the producers, winery/brewery/distillery experiences/world-class dining in spectacular settings)</li> </ol>

# POLICY STRATEGY

Cultural Infrastructure Plan 2025+

*Provides the strategic framework for how the NSW Govt. will invest in and support cultural infrastructure in NSW*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<ul style="list-style-type: none"> <li>• <b>Goal 12: Reduce barriers to private delivery and funding for cultural infrastructure p.51:</b> Ensure that NSW Government policy affecting the night-time economy includes balanced provisions that support the establishment and operation of cultural infrastructure, such as theatres and live music venues.</li> <li>• <b>Region Plans alignment (for Central River City, Western Parkland City and Easter Harbour City)</b> - Facilitate opportunities for creative and artistic expression and participation, wherever feasible with a minimum regulatory burden, including:               <ul style="list-style-type: none"> <li>• arts enterprises and facilities and creative industries</li> <li>• interim and temporary uses</li> <li>• appropriate development of the night-time economy</li> </ul> </li> <li>• providing for a diverse and vibrant night-time economy in a way that responds to potential negative impacts</li> </ul>		

# POLICY STRATEGY

Staying Ahead: State Infrastructure Strategy 2022-2042 - Infrastructure NSW

*Outlines the state's 20 year infrastructure program*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p><b>3.5 A competitive visitor economy supported by cultural and sporting facilities p.60</b> - ongoing investment that targets:</p> <ul style="list-style-type: none"> <li>• any remaining significant gaps in the State's portfolio of cultural, sporting and tourism assets</li> <li>• alignment with population growth patterns, including investment alongside future growth in Sydney's Central and Western Parkland Cities, and regional hubs</li> <li>• representation and accommodation of diverse cultures and communities, including NSW's rich Aboriginal heritage and contemporary culture</li> <li>• greater engagement through new local and digital access opportunities</li> <li>• renewal and maintenance of existing infrastructure, as well as the development of new fit-for-purpose facilities.</li> </ul>		

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p><b>Goal 5: Responsive Sydney p.21</b></p> <ul style="list-style-type: none"> <li>• <b>5.1 Responsive regulation:</b> streamlined development consents; improvements to liquor licensing; trading hours (avoid very late closing hours in residential areas, wind down hour, venue dispersal plans); improved security and complaint making; effective regulation and compliance p.21-23</li> <li>• <b>5.2 Cutting red tape:</b> help for businesses to navigate processes; improved processes for events; workshops for event managers p.23-24</li> <li>• <b>5.3 Precinct action plans:</b> unique village groups with integrated plans p.25</li> </ul> <p><b>Goal 5: Priority actions p.21</b></p> <ul style="list-style-type: none"> <li>• The introduction of a regularly renewed licensing permit system;</li> <li>• Improvements to the complaint-making process for local residents;</li> <li>• A pilot of the penalty and incentive Traffic Light System used in Cardiff, Wales, to improve venue compliance;</li> <li>• An annual series of 101 workshops for business and the not-for-profit sector to help navigate approval processes; and</li> <li>• Localised village plans.</li> </ul>	<p><b>Goal 3: Diverse Sydney p.12</b></p> <ul style="list-style-type: none"> <li>• <b>3.1, 3.2 Diverse options</b> - wide choice of leisure and entertainment, mix of private and public activities for all ages, lifestyles and cultures; later-trading retail, dining and food options, and cultural venues; new uses for underutilised night-time and finegrain spaces; more employment options with later trading hours; restricting growth in key locations (in areas that already have significant problems); a more dispersed night-time economy (preventing very large pubs and clubs to be clustered together); environmentally sustainable businesses p.12-16</li> </ul> <p><b>Goal 3: Priority actions p.12</b></p> <ul style="list-style-type: none"> <li>• An annual <i>Nuit Blanche</i> or White Night, where Sydney cultural institutions and galleries stay open late on one night of the year;</li> <li>• Australia's first 24-hour library;</li> <li>• Delivery of landmark new policy including a Retail Action Plan, a Hospitality Action Plan, a Tourism Action Plan and a Cultural Policy, all with night-time elements; and</li> <li>• Advocate for restrictions in growth in key late-night precincts in Sydney;</li> <li>• Review our own policies to identify growth opportunities for the NTE in other areas in Sydney; and</li> </ul>	<p><b>Goal 1: Global Sydney p.6</b></p> <p><b>1.1, 1.2 Global leadership</b> - City of Sydney to be a leader amongst global cities through good governance, coordinated government and business actions and management of growth p.6,7</p> <p><b>Goal 1: Priority actions p. 6</b></p> <ul style="list-style-type: none"> <li>• Promotion of Sydney as the Asia-Pacific region's première dining and live music and entertainment destination;</li> <li>• Creation of a new global night time cities index to rank international cities;</li> <li>• Creation of a national cost benefit methodology to compare economic night-time economy turnover across Australian cities and internationally; and</li> <li>• Creation of an OPEN Sydney round table, which will meet annually to monitor and report on the delivery of actions and projects.</li> </ul> <p><b>Goal 2: Connected Sydney p.8</b></p> <ul style="list-style-type: none"> <li>• 2.1 Connected transport - better and safer late-night transport options: increased public transport, increased taxi access, improved parking and bicycle access p.9</li> <li>• 2.2 Connected business, events and visitors - visitor information and connectivity (including technology), packaging visitor experiences (cross promotion with DNSW, linking business to events) p.11</li> </ul> <p><b>Goal 2: Priority actions p.8</b></p> <ul style="list-style-type: none"> <li>• Deliver Connecting our City, a landmark strategy to improve Sydney's transport;</li> <li>• Doubling of NightRide bus services and a night-time shuttle bus trial;</li> <li>• A review of all Sydney night-time taxi rank locations, design and operations;</li> <li>• A night-time Sydney web portal and app; and</li> <li>• Connecting businesses with events, opportunities and each other to create a more "connected" experience for city workers, residents and visitors.</li> </ul>

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
		<p><b>Goal 4. Inviting and Safe Sydney p.17</b></p> <ul style="list-style-type: none"> <li>• <b>4.1 Better public spaces:</b> areas managed like events (coordinated transport, policing, cleaning, security, toilets); creative and functional lighting; better way-finding; more public toilets; improved pedestrian experience and street frontages; cleaner streets; more police and security p.17-19</li> <li>• <b>4.2 Improved drinking culture:</b> restricted drinking in some areas; education initiatives p.19-20</li> </ul> <p><b>Goal 4: priority actions p.17</b></p> <ul style="list-style-type: none"> <li>• Managing late-night areas (like events);</li> <li>• A new hierarchy of way-finding signage and a way-finding</li> <li>• App for people living with disabilities;</li> <li>• A new lighting strategy for an aesthetic lighting pilot in key streets;</li> <li>• More public toilets and a Public Toilet Strategy; and</li> <li>• New CCTV cameras in problem areas.</li> </ul>

## POLICY STRATEGY

Late Night Trading Development Control Plan 2007  
 Sydney Development Control Plan 2012  
 Open and Creative planning reforms  
*Relevant Controls for the Night Time Economy - City of Sydney*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<p>The City of Sydney's <i>Late Night Trading Development Control Plan 2007</i> adopts the provisions of the <i>Sydney Development Control Plan 2012</i>, which outlines all the provisions - definitions, objectives, requirements and rules (such as operating hours and the types of activities allowed) - for late night trading. The Sydney Development Control Plan was amended in 2021 to include the 'Open and Creative planning reforms' made in 2021 that allow (in specific areas) shops to open later without the need for an additional development consent, and encourage more small scale cultural uses to occur in existing buildings without consent.</p> <p>The 2007 Control Plan identifies late night trading areas in the Sydney LGA on land excluded from Sydney Development Control Plan 2012.</p>		

# POLICY STRATEGY

Live Music and Performance Action Plan - March 2014 - City of Sydney

*Plan made in response to the declining local live music scene - venues closing and fewer opportunities for live music and the challenge of balancing live music in residential areas.*

## RELEVANT ACTIONS / AREAS FOR NTIA

PRIORITY #1: ADVOCACY	PRIORITY #2: NEW BUSINESS MODELS	PRIORITY #3: NEW NARRATIVES
<ul style="list-style-type: none"> <li>• <b>Development Controls and Noise</b> e.g.. ensuring development controls and planning controls can support live music</li> <li>• <b>Building Code of Australia e.g.</b> increase resources to help with interpreting and complying with the Code, advocacy for bringing in an Australian Standard for low-frequency noise</li> <li>• <b>Liquor Licensing e.g.</b> improve and coordinate administrative processes, advocacy for live music venues exemptions</li> </ul>		<ul style="list-style-type: none"> <li>• <b>Audience and Sector Development</b> eg. more data collection, more rehearsal space, more programming of live music, improve transport, disability access, marketing, increase outdoor venues, address housing affordability for musicians</li> </ul>



Night Time  
Industries  
Association

Email: [comms@ntia.org.au](mailto:comms@ntia.org.au)  
[ntia.org.au](http://ntia.org.au)

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