

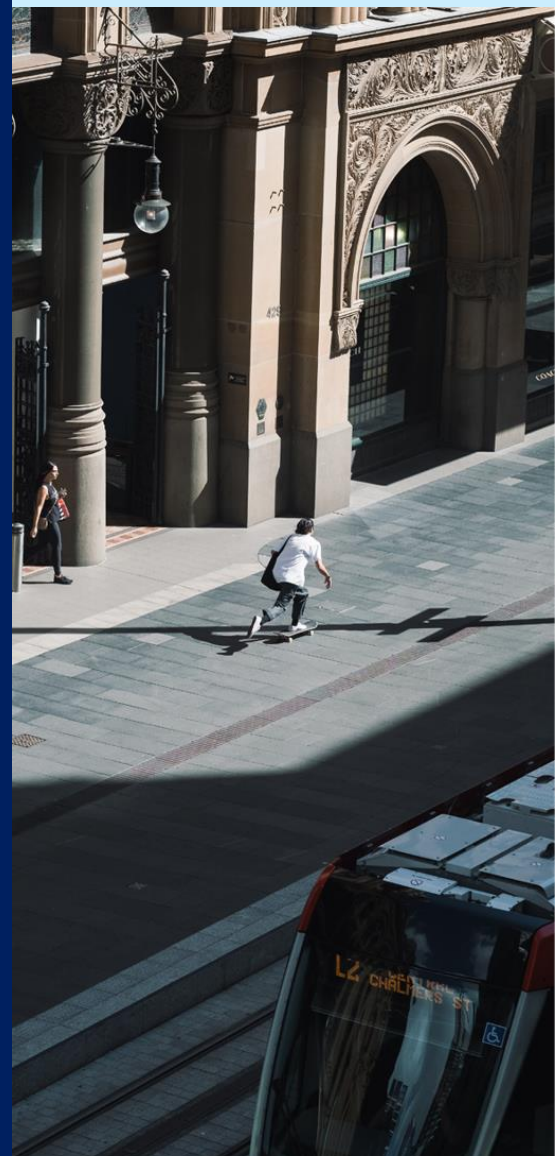


CBDs Revitalisation Program

Outcome Evaluation Report

July 2023

<https://intranet.enterprise.nsw.gov.au/business-support/evaluation/>





Mungo National Park, Willandra Lakes, NSW

Acknowledgement Of Country

Investment NSW acknowledges that Aboriginal and Torres Strait Islander peoples are the First Peoples and Traditional Custodians of Australia and thank them for their custodianship of Country – land, seas and skies. We acknowledge the diversity of First Nations cultures, histories and peoples, recognise their enduring connection to our state, and pay our deepest respects to Elders past, present and emerging.

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Executive Summary

What this report is about

The NSW Government committed \$50 million to the CBDs Revitalisation Program (the Program) over three rounds. The objective of the Program was to accelerate the economic and social recovery of CBDs across Greater Sydney, Newcastle and Wollongong.

To achieve this the Program provided targeted support for events and activation activities within the retail, hospitality, entertainment, sport, arts, and culture industries to attract people back to CBDs, and to increase their connectedness and engagement with these locations.

Across Rounds Two and Three, which were the rounds administered by the Department of Enterprise, Investment and Trade, up to \$37.1 million of funding was committed to 65 projects to deliver events and activation activities in 17 nominated CBDs across NSW.¹ In total, 61 of these projects were completed across 16 CBD areas.²

The Investment NSW Program Design and Evaluation (PDE) team conducted this outcome evaluation, to assess the degree to which the Program achieved the desired short and medium term outcomes.

The evaluation used a contribution analysis approach to determine the likely impact of the Program in achieving its intended outcomes. This approach drew on the following data sources:

- surveys of the general population of Greater Sydney, Newcastle and Wollongong conducted between June and October 2022
- surveys of event participants (at the time of the event they attended and three months following that event)
- project reporting supplied by grant recipients as required by Funding Deeds
- Opal card data from Transport for NSW supplied for the purposes of this evaluation.

There are some limitations to note around the data collected for this evaluation, including the self-reported nature of the estimates supplied by grant recipients and small samples sizes for some event participant surveys, particularly responses to follow-up surveys three months afterwards.

Nonetheless, collectively these sources of data have provided valuable evidence and insights that inform the key findings, learnings and conclusions of this evaluation.

¹ Due to withdrawn, incomplete, and variations to funding deeds of committed projects, the final allocated funding may differ at Program acquittal. There were no completed projects in the Kogarah CBD area.

² Note: a project is defined as each successful applicant, noting that some successful applicants withdrew their applications. Some applicants were funded over both Rounds Two and Three of the Program. Some projects involved multi-day events and/or a series of events.

What are the findings and learnings?

The Program induced visitation to CBD areas that otherwise may not have occurred or would have occurred later.

Events and activation activities attracted strong levels of awareness and attendance across the Greater Sydney, Newcastle and Wollongong areas with:

- a combined 5.6 million visits to the supported events³
- one in two general population survey respondents being aware of at least one event⁴
- one in five general population survey respondents attending at least one event.⁵

Events were a key driver for visitation, with 69 per cent of event participants indicating the event was a key factor in their decision to visit the supported CBD area. Survey responses indicate that, for some participants, this visitation would not have otherwise occurred or would have occurred later.

Noting the potential influence of external factors such as seasonal variations, school holiday periods, other major events and attractions and fare free travel, the results of the analysis of Opal card data are consistent with generally increased visitation at the time of events. This is based on analysis of funded events of a shorter duration (up to three days). Week-on-week analysis of tap-offs at nearby transport stops indicates increased traffic during the week of the event compared to the week prior for eight of the twelve shorter duration events.

Except for events held in the Sydney CBD, awareness and attendance of events tended to be localised.

Awareness and attendance of events in more suburban CBDs was generally higher amongst residents of the areas surrounding the event locations. These events tended to do well in terms of their conversion of awareness into attendance.

In contrast, large-scale multiday events held in the Sydney CBD (such as the Winter Festival in Darling Harbour) tended to attract greater levels of awareness among the broader population of Greater Sydney, Newcastle and Wollongong. This awareness, however, did not necessarily convert into attendance.

Visitation led to time spent and expenditure within the CBD areas.

Grant recipients reported that event participants spent an estimated average of 3.2 hours in the CBD area on the day of the event.⁶

A majority of event participants indicated spending two or more hours in the supported CBD, with almost a third of all participants spending four or more hours there.

³ Based on responses to “Number of participants at event or activation” as reported by grant recipients. Note: It is not possible to sum the number of reported ‘participants’ as it is possible that participants attended more than one event or attended the same event multiple times. Aggregation of this data would result in potential overcounting.

⁴ Reflects only events included in the population survey. A list of events to be included in each round of the survey was provided by the Office of the 24-Hour Commissioner and reflected events and activation activities undertaken at the time of the relevant survey round. The exclusion of some events means these figures are likely to be an underestimate.

⁵ Ibid.

⁶ Based on responses to “Average length of time spent by participants in project CBD area” as reported by grant recipients.

An estimated average participant spend of \$69 was reported per supported event.⁷ Grant recipient estimates indicate that 5,892 businesses were supported by the events funded by the Program.⁸

Program events changed participants' levels of connectedness and engagement with CBD areas.

Sixty two per cent of participants reported that their levels of connectedness and engagement with the supported CBD area changed after attending the event. Free text responses suggested that for an overwhelming majority, this change in perceptions was a positive one.

A change in connectedness and engagement was reported by almost two thirds of those who indicated being previously disconnected with the supported CBD area, highlighting the impact the events had on residents who were less likely to visit CBDs.

Particularly strong changes were observed in levels of participant connectedness and engagement with the Western Sydney CBDs, including Campbelltown, Fairfield, Liverpool and Bankstown.

Despite self-reported frequency of visitation to CBD areas remaining stable during the course of the Program, a majority of participants were more inclined to return to CBD areas after attending an event.

Surveyed residents consistently reported making an average of 3.3 visits to CBD areas per week between June and October 2022. Around four in ten of those surveyed during this period indicated that their CBD visitation was expected to increase over the next six months. The stated intention of increasing visitation to CBD areas and the observed stability of CBD visitation suggests a potential lag between changed attitudes and a change in behaviour.

Around seven in ten event participants indicated in the three-month follow-up survey that they had been more inclined to visit the supported CBD area after attending the event. These participants were more likely to spend additional time (approximately half a day longer) in the supported CBD areas on their repeat visits. They were also more likely than others to indicate higher levels of spend (\$101 or more) during subsequent visitation.

The evaluation identified several outside influences that may have impacted CBD visitation, including easing of COVID-19 induced behaviour and some reported barriers to CBD visitation.

Hesitation to visit CBD areas decreased during the Program but this was in part due to changed perceptions of COVID-19 risk and the gradual easing of pandemic related behaviour. Both the perceived risk of contracting COVID-19 and COVID-19's impact on decisions to attend events in CBD areas decreased between August and October 2022.

Survey results identified barriers to CBD visitation beyond the scope of the Program. Transport was an important factor mentioned as a barrier to visitation, with a number of those surveyed indicating that challenges with public transport and high parking costs were deterrents to visiting and engaging with CBD areas. The rising cost of living was also commonly mentioned as a barrier to increased visitation of CBDs.

There is continued appetite for events and activation activities to promote CBD visitation and engagement.

⁷ Based on responses to "Average dollar value spent by participants" as reported by grant recipients.

⁸ Based on responses to "Number of businesses supported within the CBD area" as reported by grant recipients.

Events continue to be a driver for CBD visitation and engagement. At the time of the follow-up survey, three in four participants indicated that events and things to do had influenced their decision to spend time in the CBD in the past week. These respondents reported staying longer in the CBD area than those not influenced by events and things to do.

Respondents to the population survey ranked supporting smaller street-based events and local businesses as important areas for NSW Government investment. Over half indicated a range of events and activations including food-based events, major events, pop-ups and cultural events would encourage them to visit or spend more time in CBD areas.

What does it mean?

The Program achieved its short and medium term outcomes by:

- driving and enabling visitation sooner than otherwise would have occurred
- increasing economic activity
- improving participant levels of connectedness and engagement
- influencing repeat visitation to the supported CBD areas.

It may take some time for attitudes towards CBD visitation and engagement to fully materialise into regular behavioural patterns, although more recent data suggests a continued upwards trend in public transport usage into 2023.

With a strong appetite for events and their observed positive influences on intended CBD visitation, events and activation activities offer continued possibilities for CBD revitalisation. Future initiatives may benefit from consideration of potential barriers to CBD visitation, including transport and cost of living pressures.

Table 1: Findings and learnings – CBDs Revitalisation Program outcome evaluation

Findings and learnings

Finding One: The funded events and activation activities induced visitation to supported CBDs.

Finding Two: With the exception of Sydney CBD, awareness and attendance of events tended to be localised.

Finding Three: The funded events and activations increased the time spent and economic activity in supported CBDs.

Finding Four: The funded events and activation activities changed participant levels of connectedness and engagement with supported CBDs.

Learning One: There are external factors that affect visitation and engagement with CBD areas. For this Program, these included the easing of pandemic related behaviours and a shift towards greater visitation of CBD areas for business/work purposes over the duration of the Program.

Learning Two: There are barriers to CBD visitation for NSW residents including sentiment towards public transport and perceptions of affordability of some CBDs.

Finding Five: There are indications that future CBD visitation and engagement will be influenced by events and activations.

Key insights



16 CBD areas supported across Greater Sydney, Wollongong, and Newcastle

2

funding rounds administered by the Department of Enterprise, Investment and Trade

\$37 million

in potential funding committed to 65 projects*

61

projects completed

32

in the Sydney CBD

5,892

estimated businesses supported[#]

Visitation

1 in 2

residents were aware of at least one event⁺

1 in 5

residents attended at least one event⁺

5.6 million

estimated visits to events[#]

69%

of participants visited the CBD area due to the event^Σ

\$69

estimated average participant spend at an event[#]

3.2 hours

estimated average participant time spent in CBD area[#]

Connectedness and engagement

62%

of participants reported a change in their connectedness and engagement with the supported CBD area after the event²

Future visitation

69%

of participants were more inclined to revisit the CBD area following the event^ϕ

* Due to withdrawn, incomplete, and variations to funding deeds of committed projects, final allocated funds may differ at Program acquittal

[#] Based on estimates reported by grant recipients

⁺ As reported in the population survey

^Σ Based on responses to the initial participant survey

^ϕ Based on responses to the follow-up participant survey

1

The Program

1.1 Overview

The NSW Government committed \$50 million to the CBDs Revitalisation Program (the Program) over three rounds. The objective of the Program was to accelerate the economic and social recovery of targeted CBDs across Greater Sydney, Newcastle and Wollongong.

The Program provided funding for events and activations to encourage people back into 17 eligible CBD areas and to increase their connectedness and engagement with these locations.⁹ It was aimed at accelerating behavioural change as people adjusted to living and working post COVID-19.

Councils, businesses, and cultural institutions were eligible to apply for funding under the Program to deliver a range of activities over three rounds including:

- the enhancement or promotion of cultural institutions
- increased promotion, marketing and events that attract people into CBDs
- live music and performances in restaurants and bars
- support for the arts, entertainment, and recreation sectors.

The Program was part of the NSW Government's COVID-19 Economic Recovery Strategy released in October 2021. Round One of the Program was established and administered by NSW Treasury and committed \$12.23 million to 6 projects delivered from late 2021.

Administration of the Program was subsequently transferred to the Investment NSW. The Program Delivery and Assurance team and Office of the 24-Hour Economy Commissioner team collectively delivered Rounds Two and Three of the Program. Round One of the Program is out of scope for this evaluation.

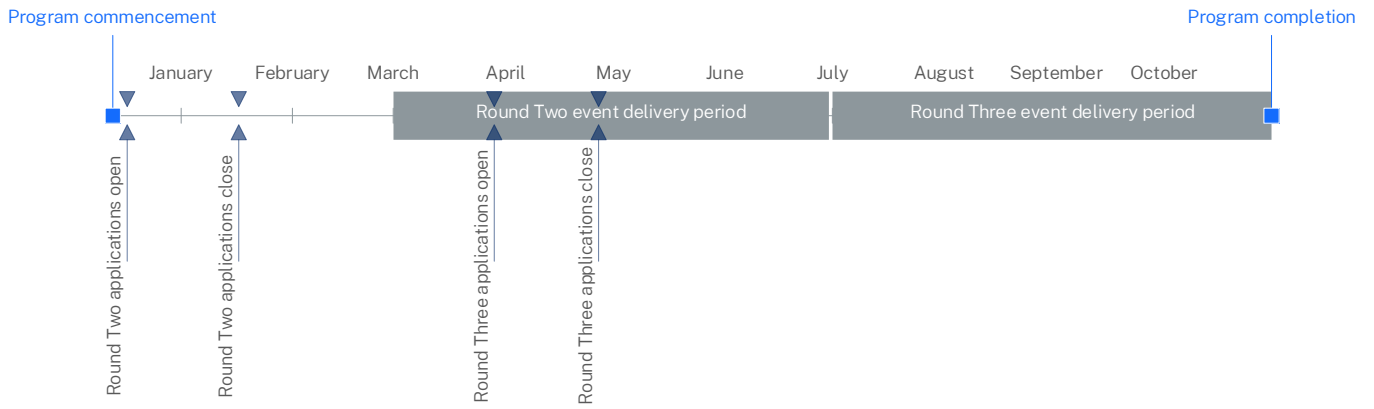
Round Two of the Program opened to applicants on 17 December 2021 and closed on 17 January 2022, committing up to \$15.8 million to support 25 projects.¹⁰ The third and final Program round (Round Three) opened on 29 March 2022 and closed on 27 April 2022, committing up to \$21.25 million to support 40 projects (

Figure 1: Timeline of application and event delivery periods – December 2021 to October 2022

⁹ Due to withdrawn, incomplete, and variations to funding deeds of committed projects, the final allocated funding may differ at Program acquittal. There were no completed projects in the Kogarah CBD area.

¹⁰ Two projects were withdrawn from Round Two of the Program.

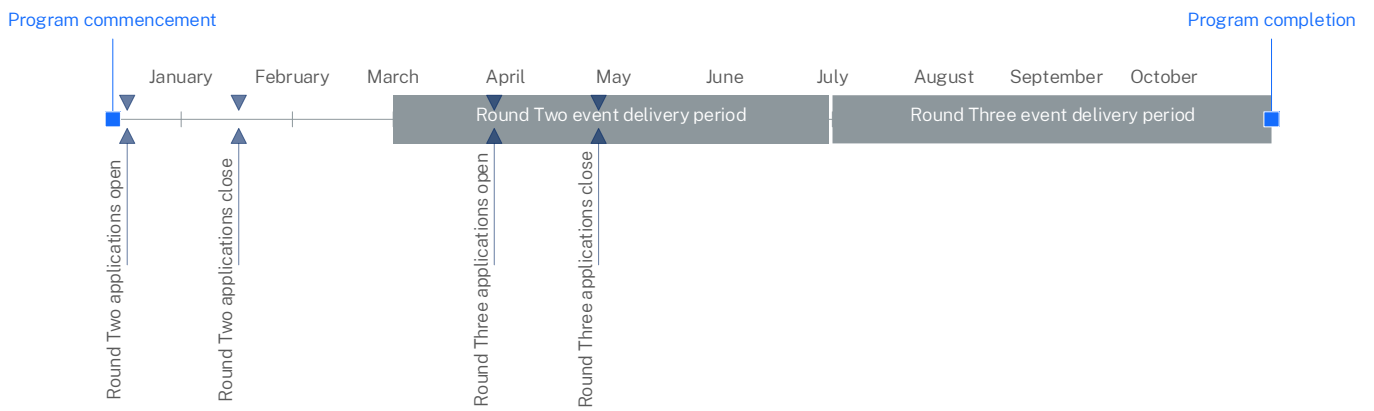
Source: Program documentation.



).¹¹

Figure 1: Timeline of application and event delivery periods – December 2021 to October 2022¹²

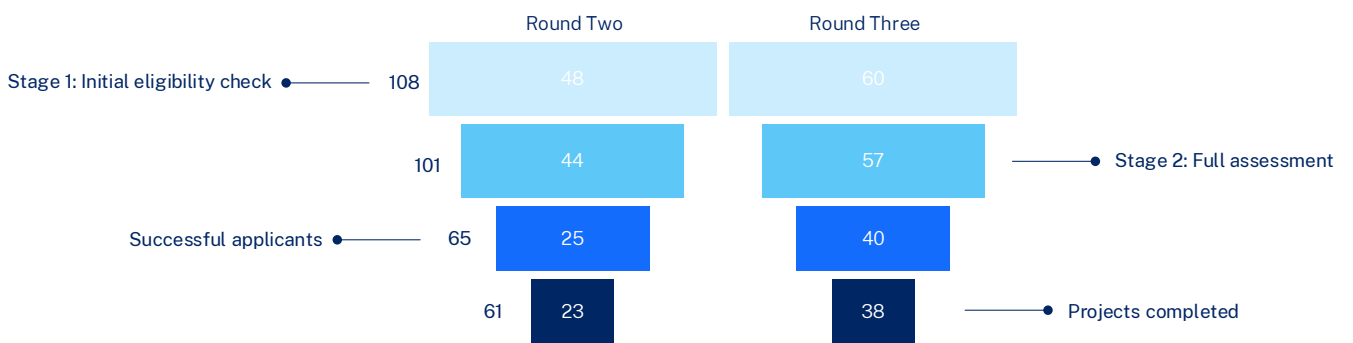
Source: Program documentation.



A summary of applications for the Program is provided in Figure 2.

Figure 2: Summary of applications – CBDs Revitalisation Program Rounds Two and Three¹³

Source: SmartyGrants.



¹¹ One project was withdrawn from the Round Three of the Program after funding was approved. One Round Three project was not completed.

¹² Some events were delivered outside the stipulated delivery periods where extensions were granted.

¹³ Two projects were withdrawn from Round Two of the Program. One project was withdrawn from the Round Three of the Program after funding was approved. One Round Three project was not completed.

Of the 65 projects that were offered support, 61 projects delivered events, festivals and activation activities across the two funding rounds. The number of completed projects across the supported CBD areas is provided in

Table 2.

Table 2: Number of completed projects per supported CBD area

Source: Program documentation.

Supported CBD area	Number of completed projects
Sydney	32
Parramatta	4
Chatswood	3
Wollongong	3
Liverpool	2
Manly	2
Sydney Olympic Park	2
Campbelltown	2
Blacktown	2
Hurstville	2
Macquarie Park	2
Newcastle	1
Bankstown	1
North Sydney	1
Penrith	1
Fairfield	1
Total	61

A process evaluation considering program design, delivery and effectiveness of program processes was conducted in 2022. This process evaluation found that program activities were broadly implemented as planned. Delays in approvals and the execution of funding deeds, however, were noted as increasing delivery pressures for some grant recipients and required extensions to the delivery window for some funded projects.

The findings of this outcome evaluation could be read as suggesting that these delays had no material impact on the overall achievement of Program outcomes. The data collected for this evaluation did not identify the delayed timing of events as adversely affecting Program outcomes.

However, this evaluation did not directly investigate the impact of delays, primarily due to data collection mechanisms being put in place before the issue of delays was identified. The risk of diminished Program effectiveness due to delays was therefore not able to be assessed or ruled out.

1.2 Context

In early 2020, the novel Coronavirus disease (COVID-19) brought health and safety risks to the public.

Businesses were impacted by public health measures aimed at reducing the spread of COVID-19, such as social distancing requirements, closures of certain industries and restrictions on gatherings.

By April 2020, ABS data revealed that 70 per cent of Australian businesses expected reduced cash flow and reduced demand for goods and services, and that this would have an adverse impact in the

near-term.¹⁴

Pandemic induced remote working, and health and safety concerns, significantly reduced travel to CBDs for work and business purposes. This was reflected in the April 2021 NAB Consumer Insights Report where 6 out of 10 Australians surveyed in March 2021 indicated that they had either stopped visiting their CBD or were visiting less often.¹⁵

Following initial COVID-19 outbreaks, NSW experienced a further fall in economic activity in CBDs due to the winter 2021 Delta outbreak. The Program was established during this period and applications for Round Two opened as Delta restrictions were easing in NSW in December 2021.

With NSW reaching a 90 per cent vaccination rate in November 2021, the subsequent year (2022) was anticipated to be a year of recovery in the wake of the most challenging period of the pandemic and the Program was expected to complement this recovery and revitalise CBD areas.¹⁶ Program events and activations commenced in March 2022 in an environment of easing of public health measures, further increasing of rising vaccination rates and the start of a return to CBDs for both work and recreation purposes.

Despite these positive shifts and improved outlook, a combination of factors continued to challenge visitation to CBD areas and the subsequent pace of economic recovery in NSW during the lifespan of the Program.

A third successive La Niña event caused severe rain events across the State,¹⁷ and 2022 saw an intensified cold and flu season in addition to another wave of COVID-19, potentially influencing movement patterns of local and international visitors. Workforce and supply chain shortages in key sectors including hospitality and retail constrained business activity,¹⁸ and industrial action across the Sydney transport network also posed a potential barrier to engaging with and visiting supported CBD areas.

Patterns of movement and behaviours of NSW residents were similarly affected by inflation and the rising cost of living. The timing of key external influences and program milestones across calendar year 2022 is detailed in Figure 3.

The finding that funded events and activation activities induced visitation to supported CBDs has to be considered in this context. The impact of the Program would likely have been greater without the range of external factors adversely affecting visitation to CBD areas. It may also be that delays in the delivery of some funded projects, particularly for Round Three, worked to the Program's advantage by inadvertently avoiding delivery of events during the July/August 2022 COVID-19 wave.

¹⁴ Audit office of NSW, "[Grants administration for disaster relief](#)" 2021, accessed March 2023.

¹⁵ National Australia Bank Limited, "[NAB Consumer Insights Report](#)" 2021, accessed July 2022.

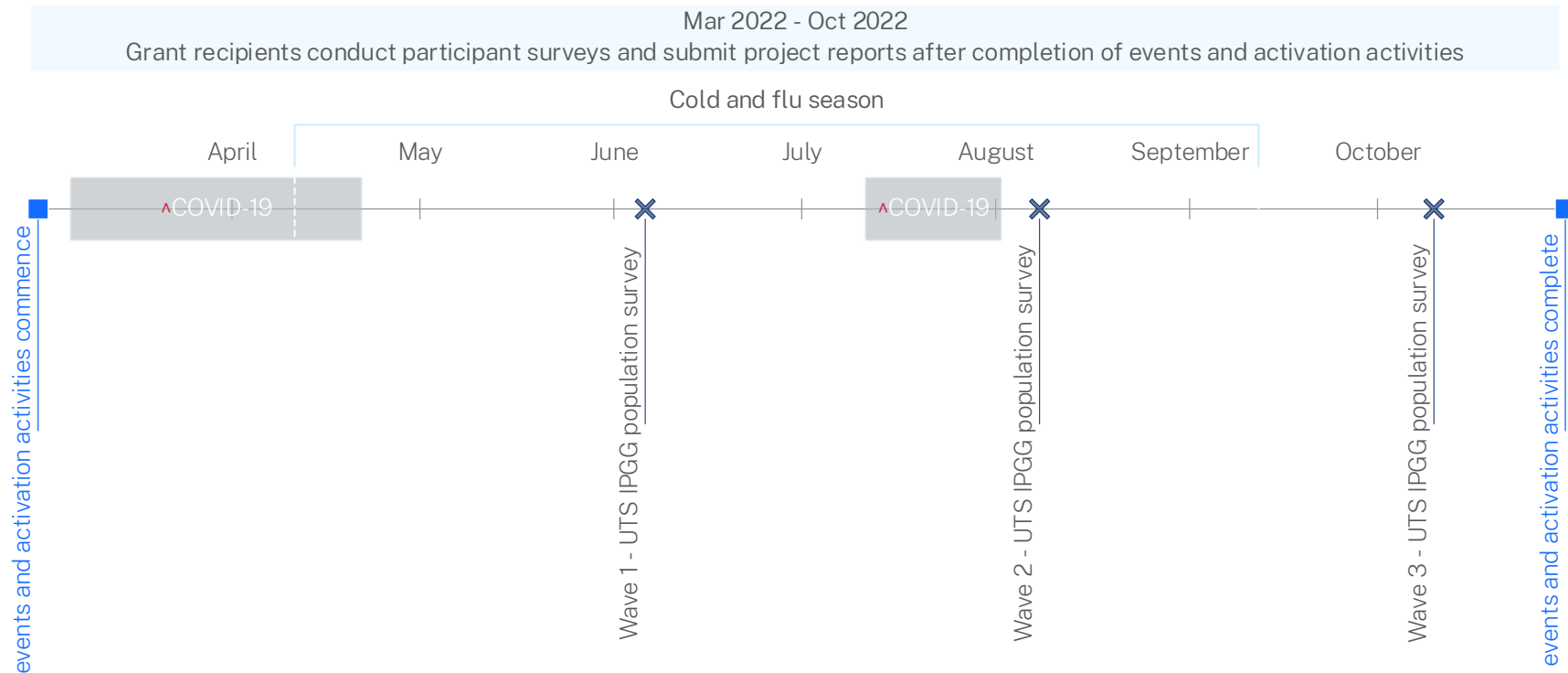
¹⁶ By 9 November 2021, 90.1% of NSW residents aged 16 and over were fully vaccinated against COVID-19. Source: NSW Health, "[COVID-19 \(Coronavirus\) statistics](#)", accessed April 2023.

¹⁷ The Sydney Morning Herald, "[It's official: Last year was wet – very wet](#)", accessed June 2023

¹⁸ National Australian Bank Limited, "[Australian Economic Update: Q1 GDP 2022](#)", accessed June 2023

Figure 3: Timing of program events, data collection, and influencing factors – March to October 2022¹⁹

Source: Program documentation, Statistics of COVID-19 progression in NSW.²⁰



¹⁹ The Program period included major events (Vivid Sydney 27 May – 18 June), school holiday periods (11-25 April, 4-15 July, and 26 September – 7 October), and transport industrial action periods (Bus: 11 April and 6 May, and Train: 28 June – 1 July and 10, 17, 23, 25, and 31 August).

²⁰ Chris Billington, "Progression of the COVID outbreak in New South Wales", 2021, accessed September 2022. Increased case numbers with a reproduction value (r) greater than one is considered an uplift in COVID-19 cases.

2

About this Evaluation

2.1 Purpose

The purpose of this outcome evaluation is to determine the extent to which the Program has achieved its objective as outlined in the program logic included in **Appendix A**. The evaluation assesses the degree to which the Program achieved intended short and medium term outcomes. It considers qualitative and quantitative data in response to the Key Evaluation Questions (KEQs) outlined in the Program's evaluation plan, which are reproduced in Table 3 below.

The findings and learnings from this evaluation may inform decisions about the nature and design of future programs by the Department, particularly those encouraging visitation or tourism.

2.2 Defining success and the Key Evaluation Questions

Determining whether the Program was successful in achieving its intended outcomes is based on observing:

1. increasing visitation to CBDs, sooner and/or at a greater frequency than what would have otherwise occurred in the absence of the Program
2. improving levels of connectedness and engagement with CBDs, in turn encouraging future visitation.

Higher levels of visitation are assumed to support higher visitor spending in CBD areas, which will in turn support the achievement of the long-term outcomes of less economic disruption to businesses in target CBDs, a faster return to a 'new normal', and more jobs retained.

The key evaluation questions are aligned to the outcomes identified in the program logic.

Table 3: The Key Evaluation Questions defining success

Key evaluation questions
Did the Program result in visitation to CBDs that would not otherwise have occurred?
Did increased visitation support increased spend in CBDs?
Did events increase the levels of connectedness and engagement with target CBDs in the target population?
Were event attendees more likely to visit CBDs independently in the future?
Was the impact of the economic shock from the COVID-19 pandemic on businesses in CBDs across Greater Sydney and surrounds lessened by the Program?

2.3 Sources of information

This evaluation was undertaken by triangulating the results from four sources of information to determine the likely impact of the Program in achieving the intended outcomes. Triangulation is a way of combining data or findings from multiple sources, that investigate the same subject, to build and check the accuracy of evidence.

The evaluation drew on analysis of data collected by grant recipients from project reports, a survey of event participants conducted by grant recipients, a population survey of the NSW community conducted by an external consultant, and analysis of Opal card data provided by Transport for

NSW.²¹

An overview of the four data sources is provided in Table 4. A summary of data received from grant recipients is outlined in **Appendix B**.

Table 4: Data sources for the outcome evaluation – an overview

Data source	Who collects it	What it collects	When was it collected
Project reports	Grant recipients	Key event metrics including participation, dwell time, spend and number of businesses supported in the relevant CBD	Submitted thirty days after the completion of event or later at the discretion of the Director, Economic Recovery and Policy
Population survey	University of Technology Sydney Institute for Public Policy and Governance (IPPG)	The perspectives of Greater Sydney, Newcastle and Wollongong communities on their connectedness and engagement with their respective CBDs, as well as information on event awareness and attendance at a general population level	Three surveys conducted in June, August, and October 2022
Participant survey	Grant recipients	The experiences and perspectives of event participants including CBD visitation and reasons for this, spend habits and dwell-times, levels of connectedness and engagement with CBDs and the influence of events on future visitation to CBDs	Two surveys conducted: the initial survey at the time of event or immediately following the event and the follow-up survey three months after the event
Opal card	Transport NSW	Time series data on the number of Opal card tap-offs at public transport stops located close to funded events	Data provided in March 2023, covering the period 2019-2022

²¹ Opal card data is owned by Transport for NSW. Transport for NSW supplied relevant data in an aggregated, de-identified format for the purpose of informing this evaluation.

2.4 Project reports

Grant recipients were required to provide key metrics for completed events as part of project reporting arrangements.

These metrics were:

- number of participants at the event or activation
- average dollar value spent by participants
- average length of time spent by participants in project CBD area
- number of businesses supported within the CBD area

For each indicator above, recipients were required to provide a target value and an achieved value (actual or estimated) at the time of reporting. For analysis purposes, all data supplied by grant recipients has been treated as an estimate. More detail is provided about limitations in **Section 2.4.4**. Data supplied that was missing, incomplete, or incorrectly completed for a particular indicator, was excluded from the analysis.

A stylised example of a completed indicator reporting template is provided in Figure 4.

Figure 4: Key indicators template – stylised example

*Source: Adapted from SmartyGrants, CBDs Revitalisation Program project final report. *Numbers are illustrative only for the purposes of this stylised example.*

Metric	Target	Achievement	Actual or Estimated?
Number of participants in event or activation	38,000 *	128,000 *	Estimated
Average dollar value spent by participants	\$10 *	\$10 *	Estimated
Average time spent by participants in project CBD area	2 hours *	2 hours *	Estimated
Number of businesses supported within the CBD area	80 *	100 *	Estimated

2.4.1 Surveys

Two surveys were conducted to inform this evaluation.

A **population survey** that was designed, implemented, and analysed by the University of Technology Sydney Institute for Public Policy and Governance (IPPG). The methodology and key findings of this survey are detailed in the CBDs Revitalisation Program population survey report included in **Appendix C**. This survey aimed to gain an understanding of the levels of awareness, connectedness, and engagement of residents across Greater Sydney, Newcastle and Wollongong.

A **participant survey** that was designed by the Investment NSW Program Design and Evaluation team and was implemented by grant recipients and returned to the Department. The survey captured the perspectives and experience of event participants on the day of the event (an **initial survey**) and three months after the event (a **follow-up survey**).

Design, implementation, and collection of the participant surveys

The initial and follow-up event participant surveys included common (repeat) questions designed to track changes in CBD visitation and spending over time.

The initial survey captured levels of participant engagement and connectedness with the relevant

CBD area (pre and post event attendance), as well as ascertaining whether the event was a key driver for CBD visitation.

The follow-up survey included questions to determine whether event attendance had a longer-term impact on CBD visitation, as well as to examine more generally the influence of events and 'things to do' on CBD visitation.

Eight and six questions were included in the initial and follow-up survey respectively. Survey questions are included in **Appendix D**.

The two sets of survey questions were attached to the funding deed with grant recipients required to develop the method and mode of implementation of the survey. Analysis of data sets received and supporting program documentation suggest that some event providers administered the survey themselves, while others appear to have outsourced this to an external provider. Several modes of implementation appear to have been used, with the survey being made available to participants via email or in-person depending on the scale and type of the event, as well as the preferences and capabilities of the provider.

Returning the completed initial survey was a requirement at the time of project reporting and grant acquittal. The follow-up survey was conducted three months after the event and the data was to be provided within 20 business days after its completion.

A summary of survey data received is provided in **Appendix B**.

Analysis

The Investment NSW Program Design and Evaluation team, conducted the data cleaning, coding and analysis. Data sets excluded from the analysis are indicated in **Appendix B**.

Free text responses were thematically analysed and quantified where appropriate using a detailed coding frame.

The initial survey had a total sample size of 15,916 responses from 59 grant recipients. Comparatively, the follow-up survey had a sample size of 1,988 responses from 52 grant recipients. A distribution of sample sizes is provided in **Appendix B**.

Only de-identified data was reviewed for the evaluation and no potentially identifying information has been included in this report. Free text responses have been incorporated throughout the report where useful to illustrate respondent sentiment.

2.4.2 Transport data

The Investment NSW Program Design and Evaluation team developed a bespoke analysis model matching Transport Stop Numbers (TSNs) to events based on proximity to the event location.

Proximity to an event was determined by the average distance commuters travel to access various modes of public transport.

The analysis assumed that commuters would be willing to travel a similar distance between:

- Their initial departure point and accessing public transport

- Their public transport arrival point and the event location.

These average distances have been based on research undertaken by Daniels and Mulley.²² As their research focused only on the average walking distance commuters travel to access trains and buses as the modes of transport, within this evaluation, ferries and light rail have been treated as trains and as buses, respectively.

For the purpose of this analysis, Transport for NSW supplied de-identified data detailing the number of daily Opal card tap offs at a requested range of locations (designated by associated TSNs) for the period 2019 to 2022. This period was selected to allow for comparisons of public transport usage prior to, during and following events, while also providing a pre-COVID benchmark.

The Investment NSW Program Design and Evaluation team used the analysis model to match daily tap off numbers by TSN to events in order to ascertain total tap offs for each event location. The data was subsequently aggregated at weekly, monthly and yearly levels, both by individual event location and by all TSNs requested.

Event level analysis was undertaken for events up to three consecutive days in duration. This period was chosen to mitigate for the scale, breadth and variety of event offerings and to focus the analysis on observing travel patterns to associated TSNs over a period of twenty one days i.e. the calendar week before, during, and after the event.

'Network level' data for comparison was obtained from the Transport for NSW open data hub.²³ Where relevant, data has been aggregated at the monthly and yearly level.

2.4.3 Methodology

A range of external factors impacted observed outcomes being measured by this evaluation. These include:

- other NSW Government programs and initiatives delivered in response to COVID-19²⁴
- external factors such as extreme weather events and industrial action impacting public transport
- behavioural shifts generally in the population with changes in flexible working arrangements and workplace attendance policies
- changes in health risks due to fluctuations in COVID-19 and other illnesses, as well as rates of vaccination.

Several approaches were considered for this outcome evaluation to mitigate challenges in determining attribution. A contribution analysis was determined to be appropriate and was the approach that was outlined in the Program evaluation plan in January 2022.

Contribution analysis (a non-experimental approach) is most suitable for programs such as the CBDs

²² Daniels, R, and Mulley, C, 2013, "Explaining walking distance to public transport: The dominance of public transport, The Journal of Transport and Land use, vol.6, no. 2, pp.5-20

²³ Transport for NSW Open data. "Opal trips – all modes", accessed June 2023

²⁴ NSW Audit Office, "Coordination of the response to COVID-19", 2022, accessed January 2023.

Revitalisation Program where there is limited or no capacity to vary the scope of program implementation and where a control group cannot be identified or would be excessively costly to establish.

The contribution analysis approach attempts to infer or show proof of the impact that the Program had on observed results by relying on a combination of data sources. It provides a body of evidence and line of reasoning to form plausible judgements regarding the contribution of the Program to stated outcomes. It cannot, however, give definitive proof of causation.

2.4.4 Limitations of data and analysis

There are several limitations to note around the data collected for this evaluation.

Data on key event metrics such as the number of attendees and the number of businesses supported were provided by grant recipients. These figures were mostly noted by grant recipients to be estimates. These estimates have been taken at face value as there was no reasonable way to validate them. Analysis based on this data should therefore be interpreted with caution.

Although the same questions were asked, differences in the way that grant recipients administered the participant survey may result in differences in data between funded projects. Most surveys contained the required questions and answer options. Any surveys where required questions were omitted, replaced, or significantly altered were excluded from the analysis.

For some events there were low survey response rates and thus small sample sizes relative to estimated number of participants. For relevant events, this requires interpreting survey results with caution. This has been noted throughout this report where relevant.

The follow-up survey had a low response rate due to the incidental nature of participation in some events and a lack of an incentive to complete a subsequent survey. This limits the robustness of comparisons between survey data over the two surveys.

Given the overall volume of commuters, and the scale, quantity, duration and timing of events, the Opal card findings should be interpreted with caution. External factors including inclement weather, seasonal travel trends, other major events, school holidays, fare free travel periods and transport industrial action, identified in **Section 1.2** should also be considered when interpreting the analysis of Opal card data.

Moreover, Opal card data does not reflect event visitation among those taking alternative modes of transport, for instance, those who walked to events, drove or used rideshare services.

Limitations of the population survey are detailed in **Appendix C Section 1.4**.

3

Findings and learnings



Finding One: The funded events and activation activities induced visitation to supported CBDs.



46%

of residents of Greater Sydney, Newcastle and Wollongong were aware of at least one event²⁵



20%

of residents of Greater Sydney, Newcastle and Wollongong attended at least one event²⁶



5.6 million

estimated visits reported to the events²⁷



69%

of event participants visited the CBD area due to the event²⁸

There were strong levels of event awareness and attendance among the general population. Reported estimates of event visits confirm high levels of CBD visitation.

Almost half (46 per cent) of respondents (residents in Greater Sydney, Newcastle and Wollongong) indicated being aware of at least one event out of the thirty-eight listed across the three rounds of the population survey.²⁹ One in five residents of these areas (20 per cent) reported attending at least one of these events.

These figures are likely to be underestimates as only current events were included in the population survey.

Approximately 5.6 million visits to events were reported by grant recipients.³⁰ Of these, 3 million visits were reported at events held in the Sydney CBD (53 per cent of total visits) and over a million visits were estimated for Sydney Olympic Park CBD events (19 per cent of total visits) (Figure 5). In line with visitation levels, around half of all funded events were held in the Sydney CBD (32 of the 61 completed projects –

“I have never explored Sydney Olympic Park before, but we decided to come here as we heard there was live music going on. We thought that was a perfect opportunity to explore the area and hear from Australian artists” participant at Park Sounds (Aug-Oct), Sydney Olympic Park

“A good reason to come out on a Saturday night and do a community activity we wouldn't normally do” participant at Luminous, Wollongong

“I would enjoy visiting Manly if there were more events like this” participant that was previously disconnected with the Manly CBD after attending Play Manly

²⁵ Reflects only events included in the UTS IPGG Population survey (Appendix B, Section 4, Q12, p58) [n=38]. A list of events to be included in each round of the survey was provided by the Office of the 24-Hour Commissioner and reflected events and activation activities undertaken at the time of the relevant survey. The exclusion of some events means these figures are likely to be an underestimate.

²⁶ Ibid.

²⁷ Based on responses to “Number of participants at event or activation” as reported by grant recipients [n=60]. Note: It is not possible to sum the number of reported ‘participants’ as it is possible that participants attended more than one event or attended the same event multiple times. Aggregation of this data would result in potential overcounting.

²⁸ Participants who answered ‘yes’ to question 2b in the initial participant survey “Was the [event] a key factor in your decision to attend [location] central business district today? [Total sample; base n=15,461; total n=15,916. 455 responses excluded].

²⁹ Events included in the UTS IPGG Population survey (Appendix B, Section 4, Q12, p58) [n=38]. A list of events to be included in each round of the survey was provided by the Office of the 24-Hour Commissioner and reflected events and activation activities undertaken at the time of the relevant survey. The exclusion of some events means these figures are likely to be an underestimate.

³⁰ Based on responses to “Number of participants at event or activation” as reported by grant recipients [n=60]. Note: It is not possible to sum the number of reported ‘participants’ as it is possible that participants attended more than one event or attended the same event multiple times. Aggregation of this data would result in potential overcounting.

Table 2: Number of completed projects per supported CBD area). Three larger multi-day events accounted for 55 per cent of total reported visits across all supported events, namely, Pitt Street Mall, ALIVE [April] (22 per cent), Park Sounds [Mar-May] (19 per cent) and Forage The Rocks (14 per cent) (Figure 6).

Figure 5: Visitation of supported CBD areas as a proportion of total visits³¹

Source: Reported data from grant recipients on “number of participants at event or activation”, expressed as a proportion of total reported participation grouped by CBD area [Total sample: base n=60; total n=61. 1 response excluded].

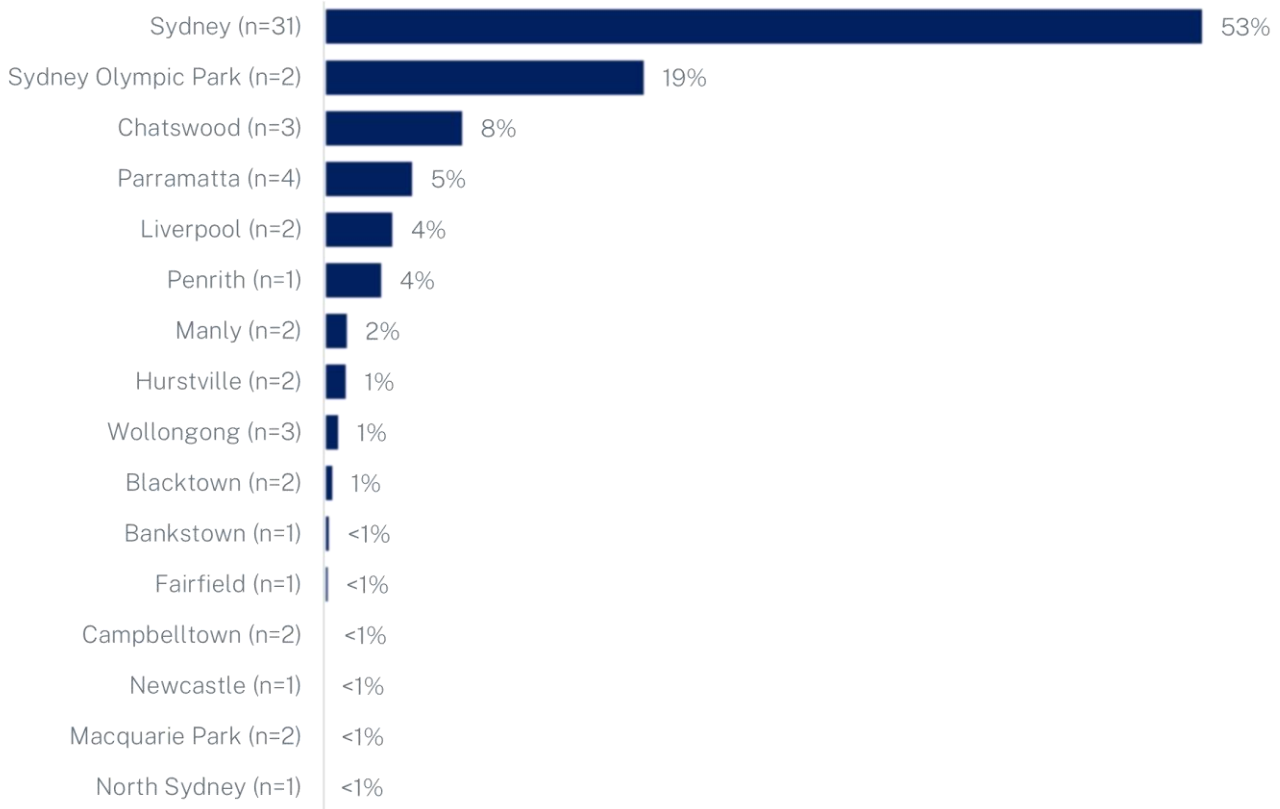


Figure 6: Visitation at selected events as a proportion of total visits³²

Source: Reported data from grant recipients on “number of participants at event or activation”, expressed as a proportion of total reported participation [Total sample; base n=60; total n=61. 1 response excluded].

³¹ The total number of individual ‘participants’ is not able to be reported as it’s likely that participants attended more than one event or attended the same event multiple times. Aggregating the raw data reported by grant recipients would overcount the total number of individual participants.

³² Ibid.



Events were a key driver for visitation.

Seven in ten participants (69 per cent) indicated the event was a key factor in their decision to attend the supported CBD on the day of the event.³³

This was strongest in the Western Sydney CBDs with around nine in ten participants indicating the event was a key factor in their decision to visit the Bankstown (91 per cent), Campbelltown (90 per cent), Blacktown (88 per cent) and Fairfield (86 per cent) CBDs. North Sydney CBD also attracted a higher proportion of visitation due to the event (90 per cent) (Figure 7)

At the event level, Winter at Parramatta (99 per cent), Pleasures Playhouse Theatre and Bar (97 per cent), The Sydney Fringe Sideshow and Runaway Gardens (94 per cent) and Spice Fest (91 per cent) were those with the highest proportions of participants indicating the event was a key factor in their decision to attend the CBD (Table 5a).

The role of the events in inducing CBD visitation was also clearly evident in open text responses, where a large number of survey respondents described how the offerings were a drawcard to visit and engage with supported CBDs. In some instances, it was apparent that visitation to the supported CBDs would have occurred later or not at all, were it not for the funded events.

Events were a strong drawcard for less likely visitors.

A third of event participants (33 per cent) reported not having visited the supported CBD area the week prior to the event.³⁴

This increased slightly between events in Round Two and Round Three (from 27 per cent to 39 per cent not having visited the supported CBD in the week prior). It is unclear whether this is due to Round Three events attracting more participants who do not regularly visit CBDs or to external factors such as a slight resurgence of COVID-19, Sydney Trains industrial action, and increased costs of living pressures which may have otherwise deterred CBD visitation at this later point in time (Figure 3). These factors are further discussed in **Learning Two**.

“Great to have events on to attract visitors. Many shops and cafes are closed in Parramatta CBD and hopefully these kinds of events can activate the weekend business.” participant at Winter at Parramatta

“Although I work in the CBD, I hadn’t spent much time around the northern end of Chinatown for quite some time. However, on the back of attending events at Pleasures Playhouse, I’ve since dined at a number of bars and restaurants in the precinct that I hadn’t previously visited.” participant at Pleasures Playhouse Theatre and Bar

“I’ve gone out of my way to spend more time in Penrith and have tried different restaurants to what I usually do.” participant at ICONIC - A Penrith cultural celebration

“Since working from home for the past year, I haven’t travelled into Newcastle CBD as much. These events have got me in on a weeknight.” participant at Autumn Alive: City Activation Series, Newcastle

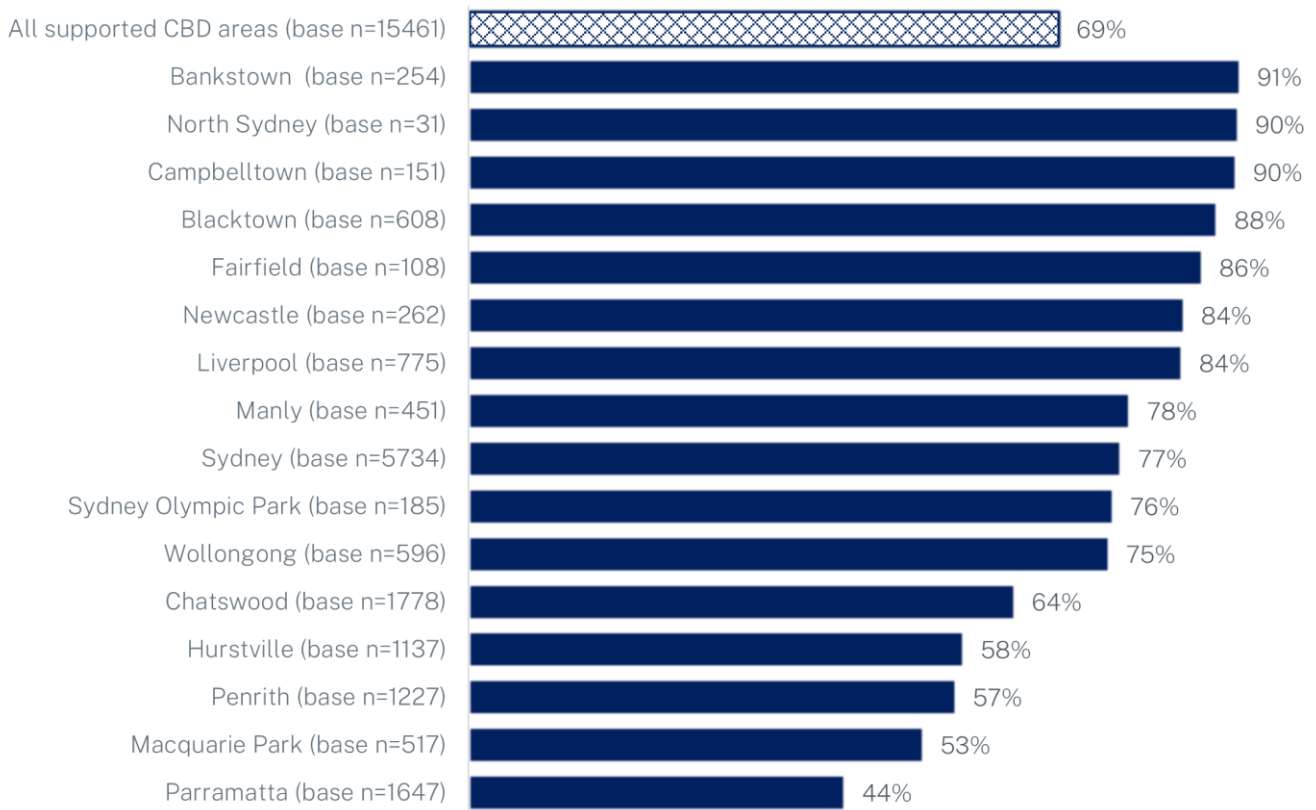
“I’m from Shellharbour and travelled to Wollongong for this which I don’t do often.” participant at Winter Warmer Festival, Wollongong

³³ Participants who answered ‘yes’ to question 2b in the initial participant survey “Was the [event] a key factor in your decision to attend [location] central business district today? [Total sample; base n=15,461; total n=15,916. 455 responses excluded].

³⁴ Participants who answered ‘0 days’ to question 3a initial participant survey “In the week prior to today how many days did you spend some amount of time in [location] central business district?” [Total sample; base n =15,220; total n =15,916. 696 responses excluded].

Figure 7: Event as key drivers for CBD visitation – event a key reason for CBD visitation

Source: Participants who answered 'yes' to question 2b initial participant survey "Was the [event] a key factor in your decision to attend [location] central business district today?" [Total sample; base n=15,461; total n=15,916. 455 responses excluded].

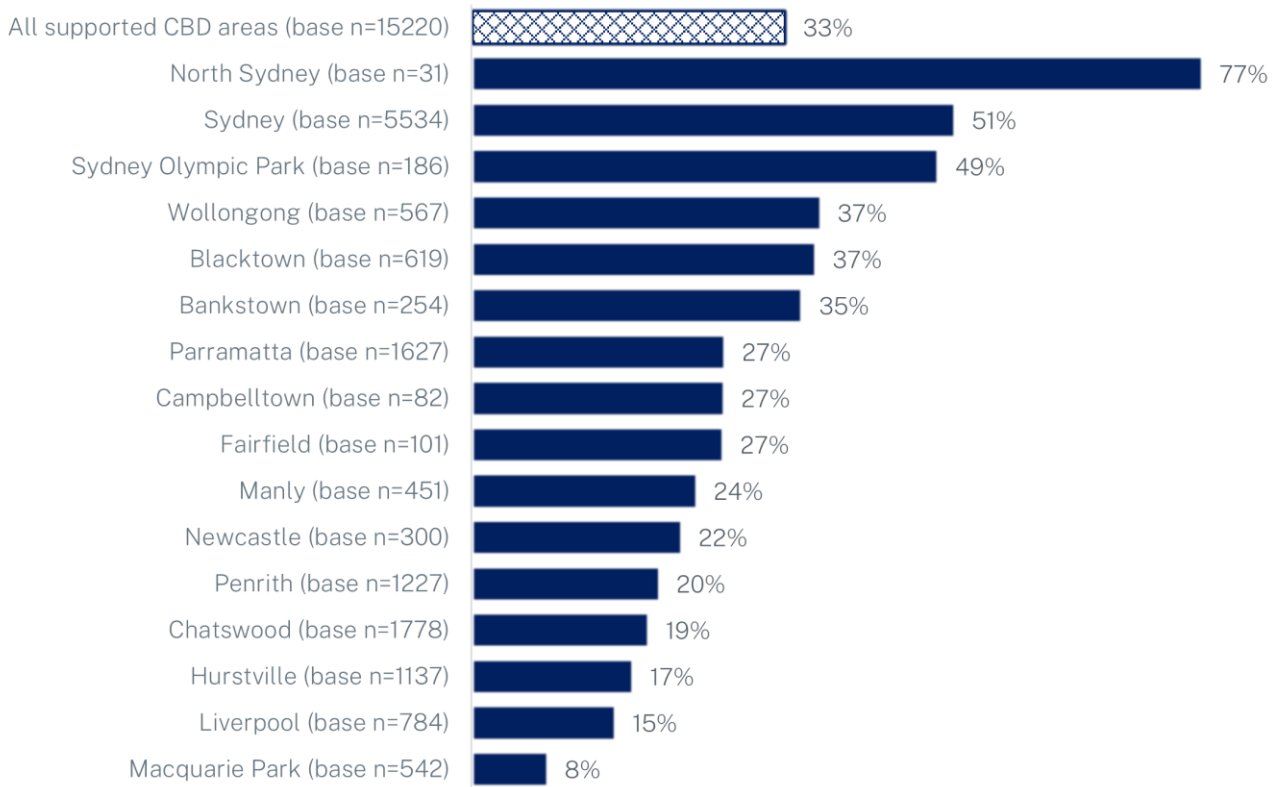


Participation among those who had not visited the CBD the week prior was particularly evident for events in North Sydney and Sydney CBD areas (with 77 per cent and 51 per cent of attendees respectively stating they had not visited the CBD in the previous week) (Figure 8). This suggests that events were successful in attracting persons who would not otherwise be visiting the supported CBD areas on a regular basis. This was particularly evident in certain ‘business’ driven locations such as the Sydney CBD where work or study was most frequently cited as the reason for visitation among those who responded to the population survey (36 per cent across the three survey rounds).³⁵

³⁵ Appendix C, Section 3.

Figure 8: Event as key drivers for CBD visitation - zero days spent in the CBD in the week prior

Source: Participants who answered '0 days' to question 3a initial participant survey "In the week prior to today how many days did you spend some amount of time in [location] central business district?" [Total sample; base n=15,220; total n=15,916. 696 responses excluded].



Seven in ten participants who were previously disconnected with the supported CBD area (69 per cent) indicated the event was a key factor for CBD visitation.³⁶

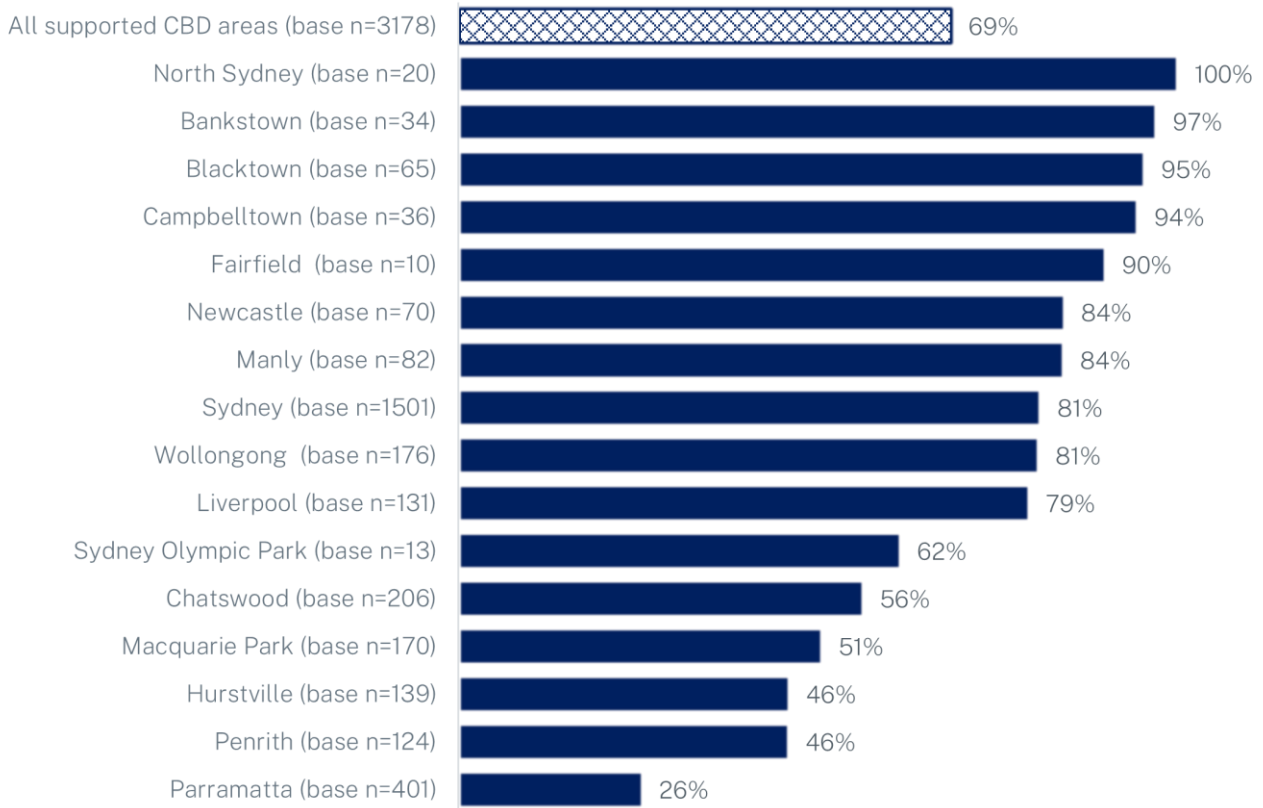
Noting small sample sizes, this was particularly evident among event participants in Western Sydney CBDs who indicated being previously disconnected with supported CBD areas. Among this cohort, consistently higher proportions indicated the event was a key reason for visitation: Bankstown (97 per cent), Campbelltown (94 per cent), Fairfield (90 per cent) and Liverpool (79 per cent) (Figure 9). All event participants who indicated being previously disconnected with the North Sydney CBD reported that the event was a key factor for visitation.³⁷

³⁶ Participants who answered 'yes' to question 2b in the initial participant survey "Was the [event] a key factor in your decision to attend [location] central business district today?" filtered by those who answered 'somewhat disconnected and engaged' or 'very disconnected and disengaged' to question 1a "Prior to attending [event] which statement best reflects your connectedness and engagement with [location] central business district" in the same survey [Total sample; base n=3,178; total n=3,247. 69 responses excluded].

³⁷ Small sample size means results are indicative only (base n=20).

Figure 9: Event as key drivers for CBD visitation – previously disconnected with the CBD area and event a key reason for CBD visitation

Source: Participants who answered 'yes' to question 2b in the initial participant survey "Was the [event] a key factor in your decision to attend [location] central business district today?" filtered by those who answered 'somewhat disconnected and engaged' or 'very disconnected and disengaged' to question 1a "Prior to attending [event] which statement best reflects your connectedness and engagement with [location] central business district" in the same survey [Total sample; base n=3,178; total n=3,247. 69 responses excluded].



Events that had a higher proportion of attendance specifically for the event such as Winter at Parramatta, Blacktown by Night, and Spice Fest also showed a higher proportion of participants who were previously disconnected with the area indicating the event was a key reason for visiting the CBD on the day (97, 95 and 94 per cent respectively). A similar trend was observed for several Sydney CBD events such as Pleasures Playhouse Theatre and Bar and at The Sydney Fringe Sideshow and Runaway Gardens (97 and 95 per cent respectively) (Table 5b).

These findings suggest that the events were successful in attracting visitation from cohorts that may not have otherwise visited the supported CBD areas.

Table 5: Event as a key factor for CBD visitation for all event participants and event participants previously disconnected with the CBD area – top five events showing the event as a key factor for CBD visitation

Source:

- a) Participants who answered 'yes' to question 2b initial participant survey "Was the [event] a key factor in your decision to attend [location] central business district today? [Total sample; base n=15,461; total n=15,916. 455 responses excluded].
- b) Participants who answered, 'yes' to question 2b initial participant survey "Was the [event] a key factor in your decision to attend [location] central business district today?" filtered by those who answered 'somewhat disconnected and engaged' or 'very disconnected and disengaged' to question 1a "Prior to attending [event] which statement best reflects your connectedness and engagement with [location] central business district" in the same survey [Total sample; base n=3,178; total n=3,247. 69 responses excluded].

Event name	CBD area supported	(a) % of participants indicating the event was a key reason for CBD visitation	(b) % of participants being previously disconnected with the CBD area indicating the event was a key reason for CBD visitation
Winter at Parramatta (base n=144)	Parramatta	99%	97%
Pleasures Playhouse Theatre and Bar (base n=60)	Sydney	97%	97%
The Sydney Fringe Sideshow and Runaway Gardens Sydney (base n=1767)	Sydney	94%	95%
Spice Fest (base n=222)	Parramatta	91%	94%
Blacktown by Night (base n=346)	Blacktown	88%	95%

Opal card data confirms generally higher levels of travel to transport stops in proximity to events of a shorter duration during the week in which they were held.

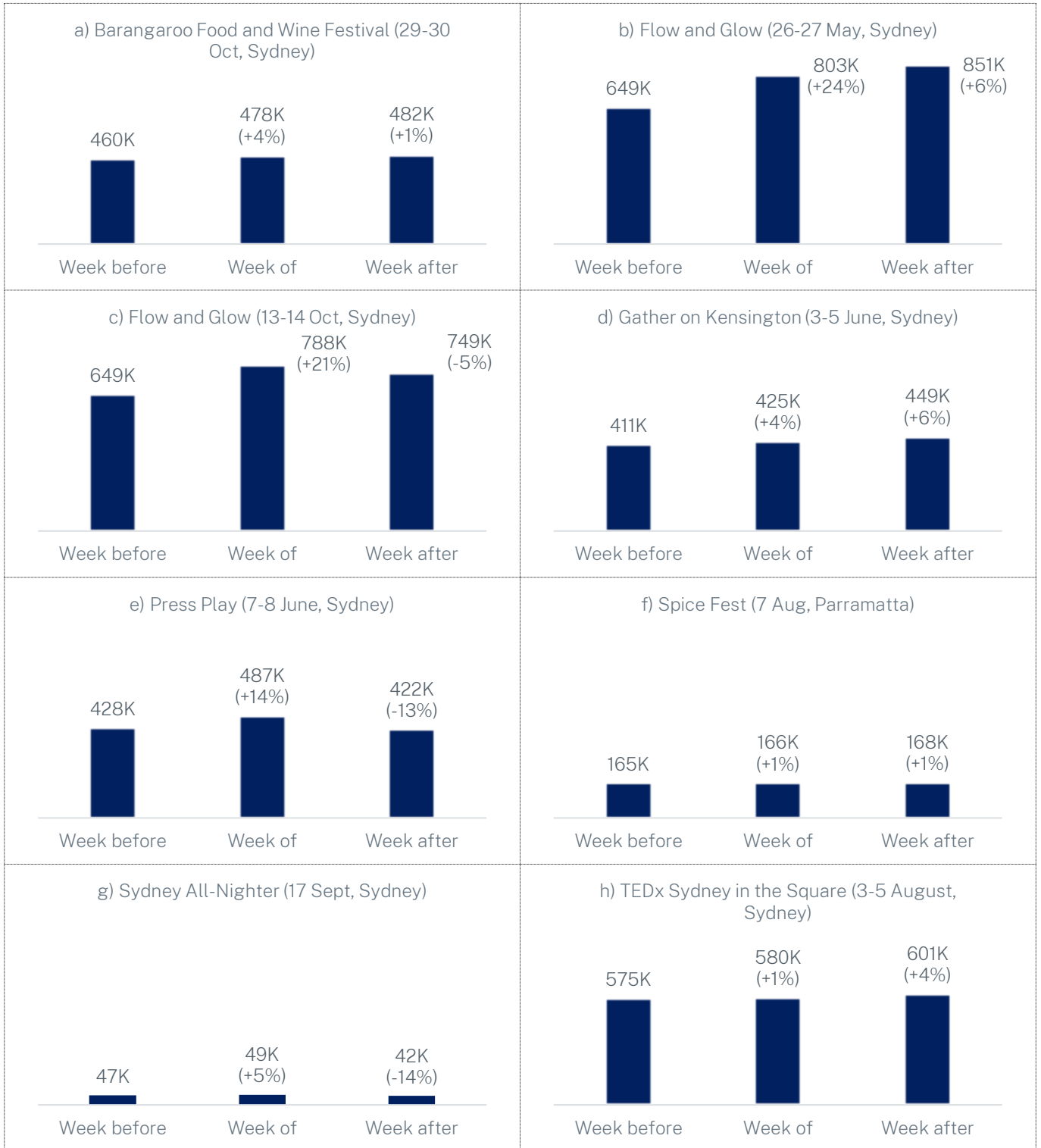
There was an increase in Opal card tap-offs at nearby transport stops during the week of the event compared to the week before the event for eight of the twelve events of shorter duration (up to three days) (Figure 10). Associated transport stops for five of these eight events sustained or increased the observed level of visitation in the subsequent week: the Barangaroo Food & Wine Festival, Flow and Glow (May), Gather On Kensington, Spice Fest and TEDx Sydney in the Square (Figure 10a, b, d, f and h).

The current analysis is unable to establish causation, therefore it cannot be determined whether and to what extent the observed increase in travel can be attributed to the Program. Factors such as school holiday periods, public holidays, other major events, and fare free travel across the network may have influenced the observed increase in Opal card tap-offs. For example, Vivid Sydney held over a three week period from late May to mid-June 2022 may have increased travel to the Sydney CBD generally during this timeframe.

While out of scope for the current evaluation, supplementary analysis could be considered in order to explore whole of system movements and better understand the potential impact of events compared to other variables.

Figure 10: Weekly Opal card tap-offs – event associated TSNs showing an increase in tap-offs in the week of the event compared to the week before the event

Source: Transport for NSW Opal card tap off data. Week before, during, and after the event for events with a duration of three days or less. For each event, figures reflect Opal card tap-offs across a consistent set of transport stops in proximity to the event location over a 21 day period. It should be noted that the scale and location of events differed. Similarly, the days on which events were held may have impacted observed visitation levels. For example, Sydney All-nighter (g) was held on Saturday and Sunday where public transport usage tends to be significantly lower.³⁸ Comparatively, events encompassing a weekday are more likely to be associated with higher levels of Opal card tap-offs such as Gather on Kensington (d) and Press Play (e) etc. Note that tap-on/tap-off data is rounded, and percentages reflect raw figures.



³⁸ Transport for NSW, “Interactive data visualisation tool”, accessed June 2023



Finding Two: With the exception of Sydney CBD, awareness and attendance of events tended to be localised.

Awareness and attendance of events was strongest in the areas surrounding the event locations hosting multiple events, or in regions neighbouring the event locations.

Parramatta CBD, where four of the thirty-eight events included in the population survey were located, had the highest levels of localised event awareness, with 60 per cent of its residents aware of at least one event. This was followed by Ryde where 58 per cent of residents were aware of at least one event, with three events being held in the area.³⁹

Further underlining the localisation of awareness, at a regional level, awareness of events in South West Sydney (45 per cent), Western Sydney (37 per cent), and Northern Sydney (30 per cent) was highest among those living in those regions. The awareness of Sydney CBD events was more evenly distributed, with residents across Greater Sydney displaying comparable levels of awareness (Table 6). This is likely due to a variety of reasons, including the higher profile of event locations and venues, as well as generally greater numbers of people travelling to the Sydney CBD for work and study, and for arts and cultural offerings.

Table 6: Event awareness by Sydney region

Source: UTS IPGG Population survey final report, Table 1 (Section 2.2.1).

	Inner Sydney	Western Sydney	South West Sydney	Northern Sydney	Other
Sydney CBD events	21%	23%	22%	15%	20%
Western Sydney events	15%	37%	23%	10%	15%
Northern Sydney events	16%	22%	19%	30%	13%
South West Sydney events	11%	25%	45%	7%	12%

Similarly, localised event attendance was found to be proportionately highest in regions hosting multiple events, or regions neighbouring the event locations. CBD areas attracting relatively high proportions of local attendees included Parramatta (36 per cent of event attendees residing locally), Sydney City (30 per cent) and South West Sydney (29 per cent). When aggregated by broader Sydney regions, residents in South West Sydney (57 per cent), Western Sydney (41 per cent), and North Sydney (31 per cent) likewise showed higher levels of localised attendance (

³⁹ Appendix C, Section 2.2.1.

Table 7).

Table 7: Event attendance by Sydney Region

Source: UTS IPGG Population survey final report, Table 2 (Section 2.2.2).

	Inner Sydney	Western Sydney	South West Sydney	Northern Sydney	Other
Sydney CBD events	26%	24%	23%	15%	12%
Western Sydney events	14%	41%	28%	9%	8%
Northern Sydney events	17%	23%	22%	31%	7%
South West Sydney events	13%	18%	57%	6%	6%

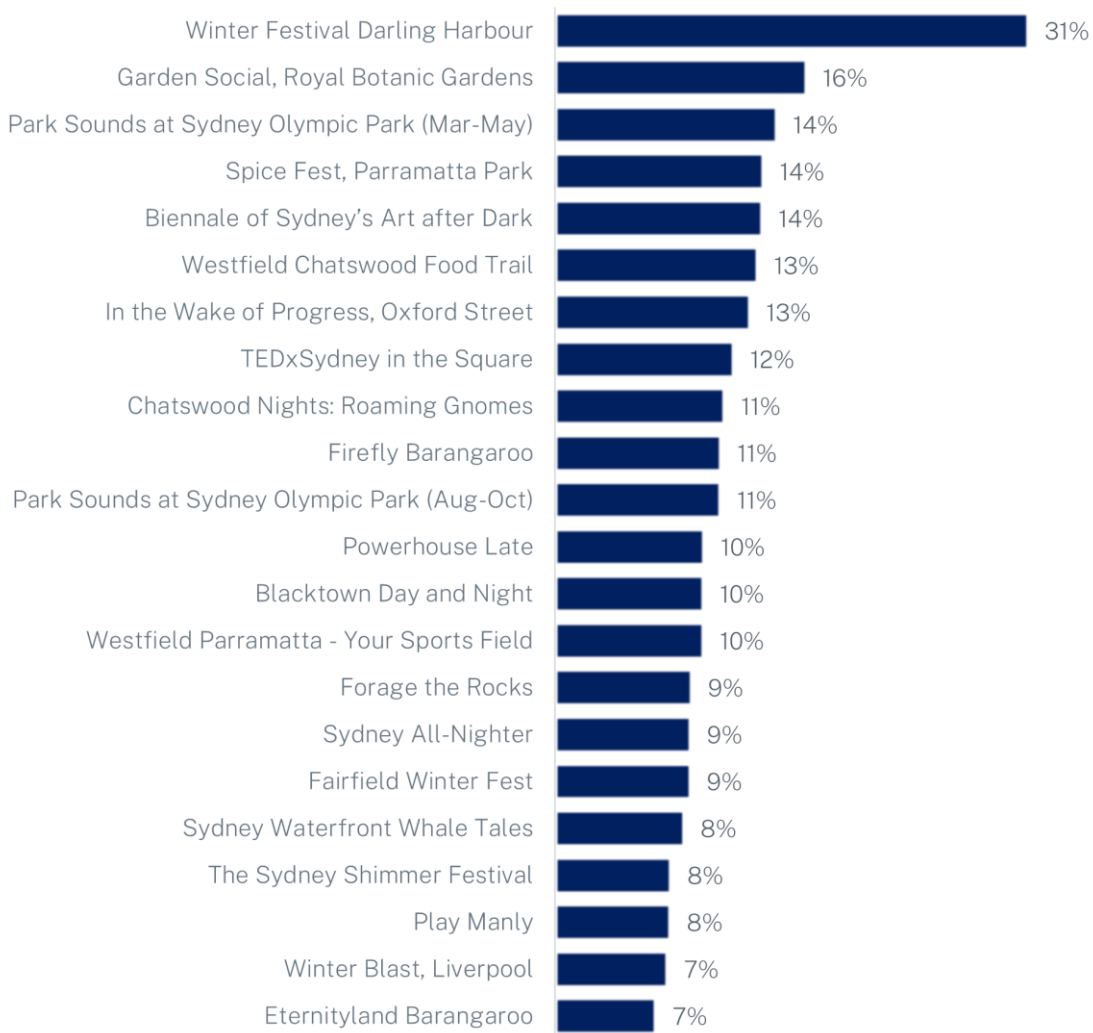
At an event level, Winter Festival Darling Harbour showed the highest level of general population awareness among those surveyed by a significant margin (31 per cent for a single event). Garden Social, Royal Botanic Gardens (16 per cent), Park Sounds (Mar–May) (14 per cent), Biennale of Sydney’s Art After Dark (14 per cent) also showed relatively higher levels of event awareness in the community (Figure 11).⁴⁰

Interestingly, higher awareness of some offerings in the Sydney CBD did not translate to higher levels of attendance compared to events held in suburban CBDs such as Sydney Olympic Park, Parramatta, Chatswood and Blacktown that showed relatively strong levels of engagement from locals (Figure 12). This could be due to several factors which are highlighted elsewhere in this report, including the general population’s perceptions of public transport and affordability of the Sydney CBD in particular that may have been a deterrent to visiting that area.

⁴⁰ Of events included in the UTS IPGG Population survey only (Appendix B, Section 4, Q12, p58) [n=38]. A list of events to be included in each round of the survey was provided by the Office of the 24-Hour Commissioner and reflected events and activation activities undertaken at the time of the relevant survey round.

Figure 11: Event awareness – population survey respondents

Source: UTS IPGG Population survey final report, Figure 5 (Section 2.3) Events with awareness of 7% or lower not displayed on chart.



The observed levels of awareness and attendance of funded events and activation activities from the general population of Greater Sydney, Newcastle and Wollongong is a strong achievement considering the scale and level of funding committed for the Program.⁴¹

The localised awareness and attendance of events may reflect increased community focus on the ‘local’ during the pandemic.

The COVID-19 period highlighted the importance of designing cities, neighbourhoods and homes in ways that support wellbeing.⁴² During pandemic induced restrictions, individuals and families relied on the creative utilisation of available space at home, adapting to evolving circumstances and relying on nearby open and public spaces. Connections to surrounding communities remain a fundamental consideration in how people continue to engage with local areas. A 2020 ‘Public spaces during COVID-19’ survey and interactive map initiative conducted by the Department of Planning, Industry and Environment found that the COVID-19 pandemic changed community

⁴¹ Events included in the UTS IPGG Population survey (Appendix B, Section 4, Q12, p58) [n=38] A list of events to be included in each round of the survey was provided by the Office of the 24-Hour Commissioner and reflected events and activation activities undertaken at the time of the relevant survey.

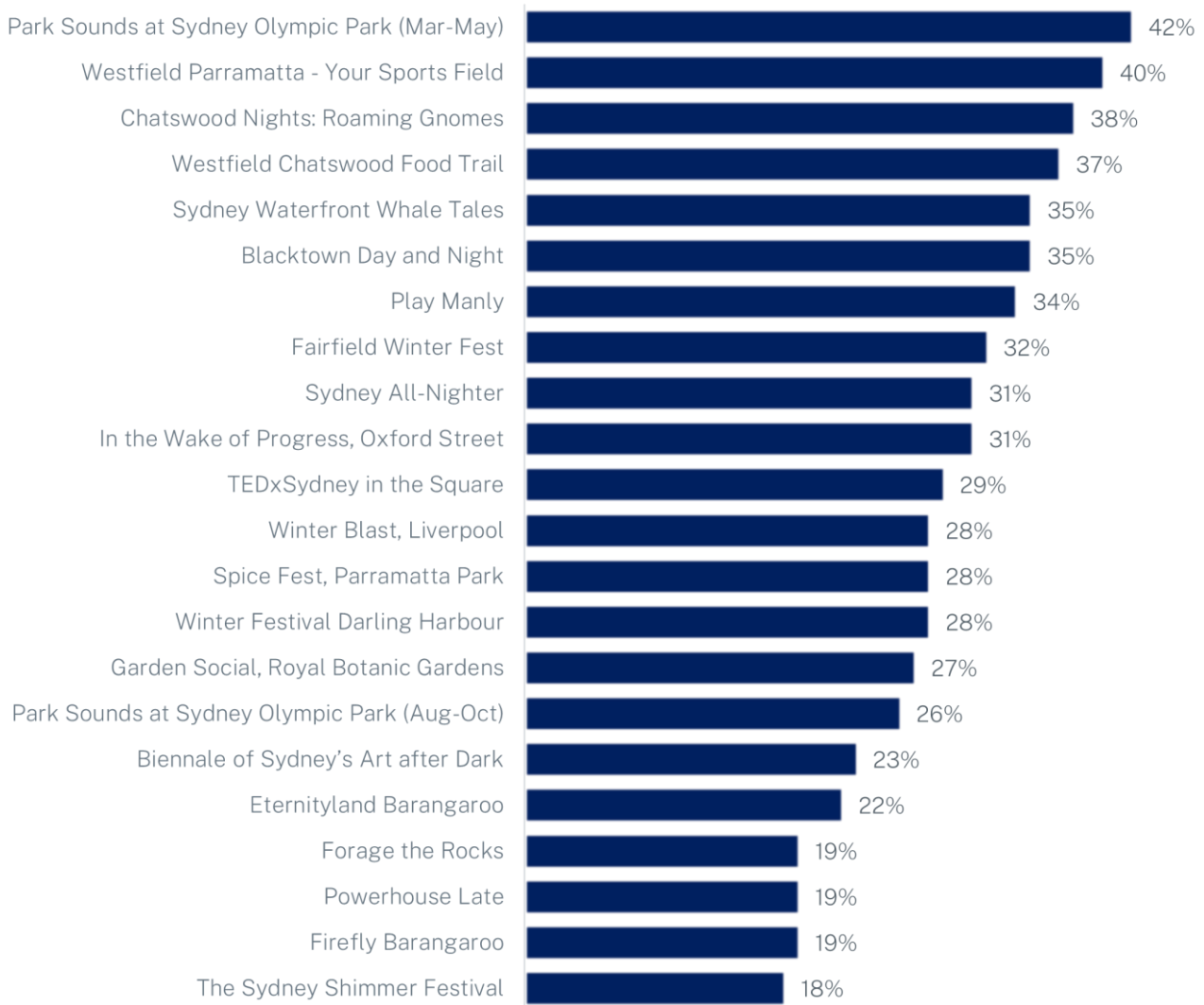
⁴² The Greater Sydney Commission, “City shaping impacts of COVID-19”, 2020, accessed April 2023.

behaviour and relationships with public spaces, with survey respondents very focused on the amenity and quality of their own neighbourhoods and streets.⁴³

Respondents to the population survey specifically identified with places that celebrated local culture and character and that had a unique identity.

Figure 12: Event attendance among those aware of events – population survey respondents

Source: UTS IPGG Population survey final report, Figure 6 (Section 2.3) Events with awareness of 7% or lower are not included in analysis.



At the same time, flexible work patterns and an increased acceptance of working from home have presented opportunities for people to locate to outer regions with reduced costs of living including housing, transport, and time costs.⁴⁴ This concentration of activity has led to an increase in access of local services and offerings, and subsequently an increase in consumer spend in these areas.⁴⁵

These shifts in the changing interface between work and home, as well as in engagement with local spaces and communities, are likely impacting, and will likely continue to impact, interactions with established metropolitan and strategic centres. They also have the potential to change or revitalise

⁴³ NSW Department of Planning, Industry & Environment, “Public Spaces during COVID-19”, 2020, accessed April 2023.

⁴⁴ Australian Government, Productivity Commission, “Working from home”, 2021, accessed April 2023.

⁴⁵ The Greater Sydney Commission, “City shaping impacts of COVID-19”, 2020, accessed April 2023.

local centres as the appetite for local offerings grows.⁴⁶



Finding Three: The funded events and activations increased the time spent and economic activity in supported CBDs.



3.2

hours reported as estimated average participant time spent in the CBD area⁴⁷



72%

of participants spent 2 or more hours in CBD area⁴⁸



\$69

reported as the estimated average participant spend at an event⁴⁹



5,892

businesses estimated to be supported by the events⁵⁰

There was notable spend and dwell time among event participants.

Grant recipient reporting indicates that event participants on average spent an estimated 3.2 hours in the supported CBD area on the day of the event.⁵¹ Similarly, participant surveys revealed that seven in ten participants attending an event (72 per cent) reported spending two or more hours in the supported CBD area, with three in ten participants (30 per cent) spending four or more hours in the CBD. Large multi-day events tended to attract a longer time spent in the area with the majority of participants at events held at Sydney Olympic Park and Macquarie Park CBD areas spending four or more hours in the CBD area on the day of the event (64 and 59 per cent respectively) (

Figure 13).

An estimated average participant spend of \$69 (*SD*=\$44, *n*=55) was reported per supported event.⁵² At the CBD level, Bankstown, Manly and Penrith CBD areas reported the highest average estimated participant spend (\$100). Conversely, some of the lower expenditure was reported at events in the Blacktown and Macquarie Park CBD areas (\$25 and \$29 respectively) (Figure 14).

At the event level, TEDxSydney in the Square reported the highest average estimated spend (\$294), with Powerhouse Late reporting the lowest (\$5). Differences in spend may have been impacted by factors such as the scale, location, services and offerings available at the events as well as the demographics of the participants at these events.

⁴⁶ Ibid.

⁴⁷ Based on responses to “average length of time spent by participants in project CBD area” as reported by grant recipients [n=58].

⁴⁸ Participants who answered question 2c. “How many hours did you spend in the [location] central business district on the day of attending [event]?” giving a response of 2 or more hours [Total sample; base n=15,345; total n=15,916. 571 responses excluded].

⁴⁹ Based on responses to “average dollar value spent by participants” as reported by grant recipients [n=55].

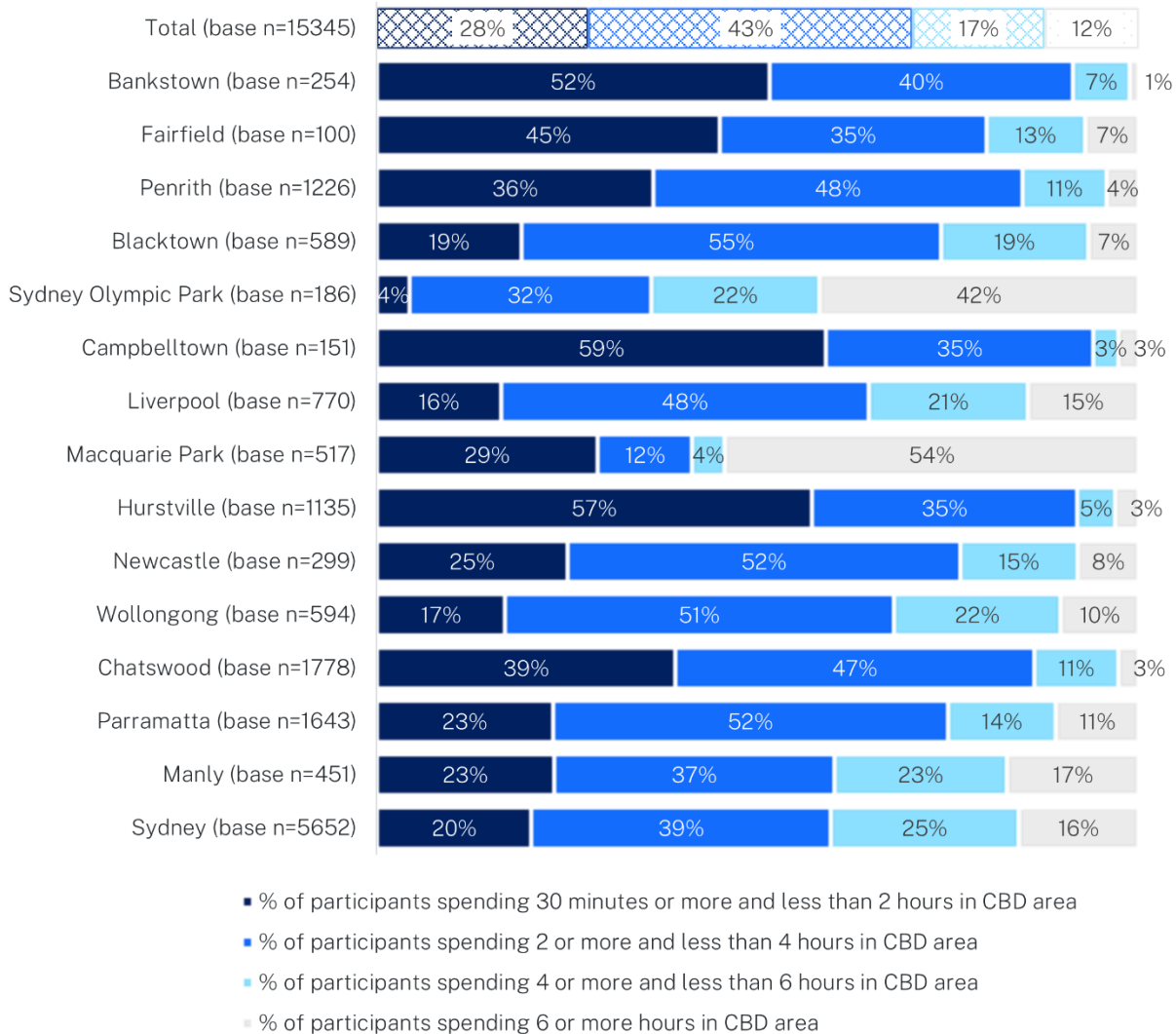
⁵⁰ Based on responses to “number of businesses supported within the CBD area” as reported by grant recipients [n=61].

⁵¹ Based on responses to “average length of time spent by participants in project CBD area” as reported by grant recipients [n=58].

⁵² Based on responses to “average dollar value spent by participants” as reported by grant recipients [n=55].

Figure 13: Event participant time spent in CBD area on the day of the event

Source: Participants who answered question 2c. "How many hours did you spend in the [location] central business district on the day of attending [event]?" [Total sample; base n=15,345; total n=15,916. 571 responses excluded] North Sydney is excluded as question 2c was not asked in the survey of participants at the event. Rounding may lead to values of 99 or 101.



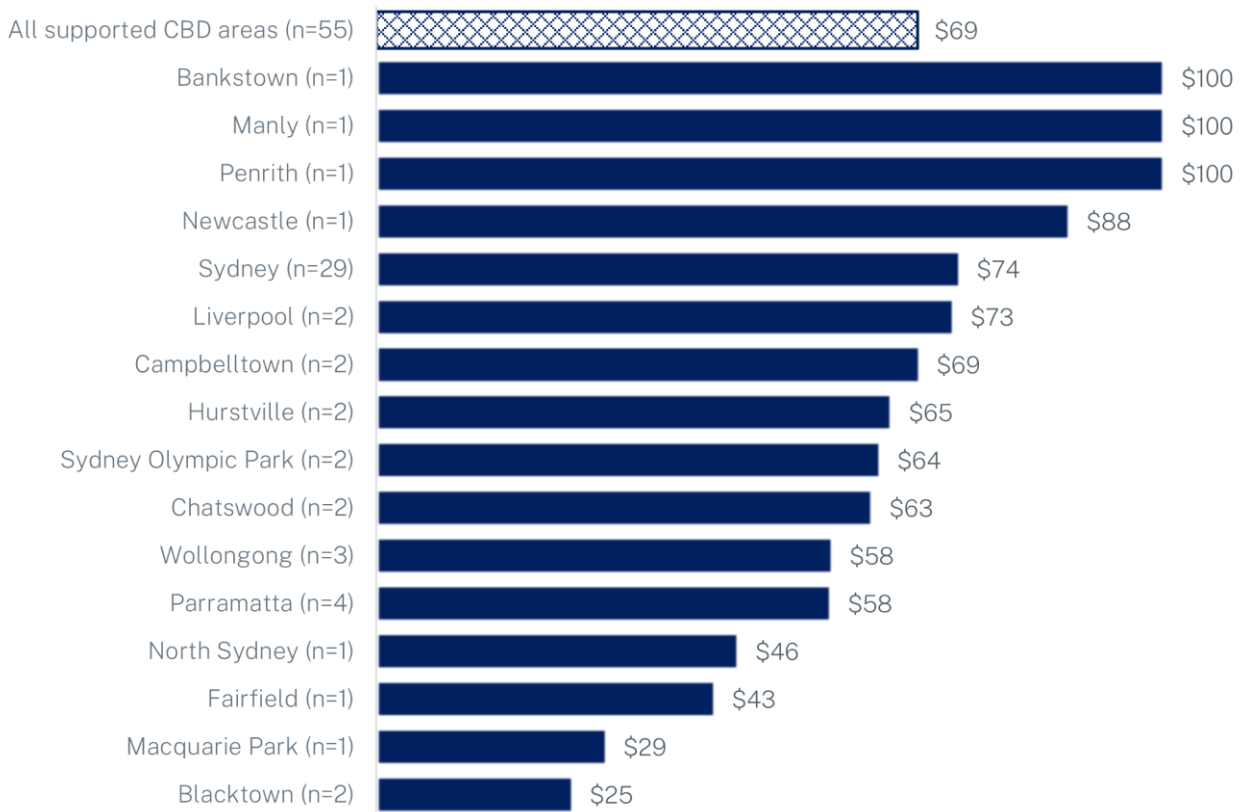
Increased visitation and time spent in CBD areas stimulated economic activity.

Population survey results indicated that the majority of CBD visits undertaken by residents in the Greater Sydney, Newcastle and Wollongong area included a secondary activity with visitors to the Sydney CBD significantly more likely to incorporate a secondary activity (83 per cent of visits to the Sydney CBD included a secondary activity compared to 72 per cent of visits to other CBD areas).⁵³ Across the majority of visits to the Sydney CBD, eating and drinking was the most prevalent secondary activity, followed by shopping.

⁵³ Appendix C, Section 3.2.2.

Figure 14: Estimated average participant spend at events in CBD area

Source: Reported data from grant recipients on “average dollar value spent by participants”, by CBD area [Total sample: base n=55; total n=61. 6 responses excluded].



There is evidence supporting the assumption that increased visitation prompts additional expenditure.⁵⁴ Analysis of card transaction data conducted by the Commonwealth Bank of Australia revealed an average increase in spend of 22.4 per cent across Australian CBDs between the periods March 2020 to August 2020 and September 2020 to February 2021. This rise in spend has been attributed to the easing of pandemic restrictions and increased visitation to CBDs.⁵⁵ Additionally, in their *Economic Outlook*, the OECD has stated that economic activity is projected to rebound as vaccination rates increase and the vaccinated population return to their places of work.⁵⁴

The Program has positively impacted businesses within the targeted CBD areas.

The Program supported an estimated 5,892 businesses in the CBD areas, as reported by grant recipients, an estimated average of approximately one hundred businesses per funded project (96.59 businesses per funded project, *SD*=126.3 businesses, *n*=61).⁵⁶

The COVID-19 pandemic disproportionately affected small to medium enterprises (SMEs) as they were more likely to be in industries that were harder hit by restrictions on movement, such as cafes, restaurants, and arts and recreation.⁵⁷ Taken collectively with the reported spend at an event and


⁵⁴ Organisation for Economic Co-operation and Development (OECD) “OECD Economic Outlook, Volume 2021 Issue 2” 2021, accessed March 2023.

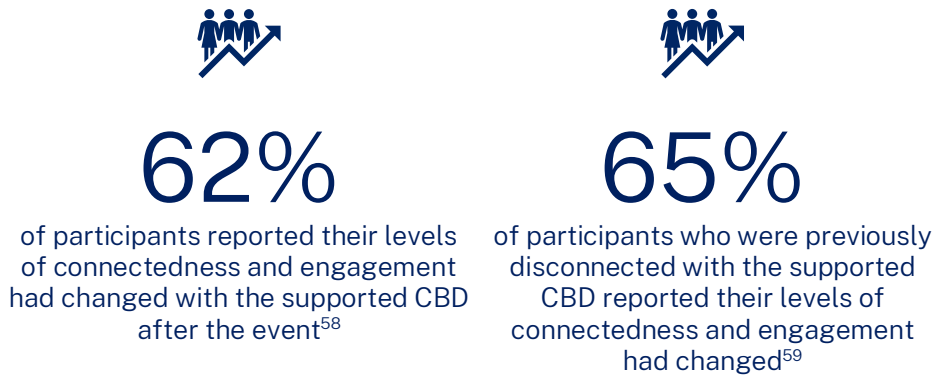
⁵⁵ Commonwealth Bank of Australia, “Spending in CBDs on the up”, 2021, accessed March 2023. Data based on card transactions via CommBank merchant facilities in major city CBDs.

⁵⁶ Based on responses to “number of businesses supported within the CBD area” as reported by grant recipients [Total sample: base n = 61; total n =61].

⁵⁷ Reserve Bank of Australia, “Small Business Finance and COVID-19 Outbreaks”, 2021, accessed April 2023.

the likelihood of an event visit leading to a secondary activity, it is more than likely that in addition to the events directly engaging and supporting businesses, that the events also led to increased economic activity for other local businesses through participant spend.

 **Finding Four:** The funded events and activation activities changed participant levels of connectedness and engagement with supported CBDs.



Event participants frequently reported a positive change in their perceptions of CBD areas.

Approximately six in ten participants (62 per cent) reported their levels of connectedness and engagement with the supported CBD area changed after attending the event.

The sentiments of those whose connectedness and engagement changed were overwhelmingly positive, with participants’ free text responses suggesting that they discovered new CBD areas, reconnected with CBD areas, appreciated the diversity and inclusivity of offerings and the opportunity to engage with supported CBDs.

Consistent with the results of the population survey where most visits to CBD areas included a secondary activity, many attendees indicated that they engaged in other activities and offerings while in the area. Some event attendees spontaneously commented that their attendance at the event would encourage continued future visitation of, and engagement with, the supported CBD having now realised what the CBD has to offer.

The population survey gauged perceptions of a range of attributes across the various CBD areas (Table 8). Results demonstrate that perceptions of CBD areas across all attributes were more favourable among those who had attended a Program event, compared to those who had not. Notably, the biggest differences were on measures of uniqueness, greenness and vibrancy. On average, those who had attended an event scored uniqueness and greenness one point higher, and vibrancy 0.9 of a point higher than those who had not attended an event. This suggests that those

⁵⁸ Participants who answered, ‘yes’ to question 1b in the initial participant survey “After attending [event] would you say your degree of connectedness and engagement with [location] central business district has changed?” [Total sample; base n=15,576; total n=15,916. 340 responses excluded].

⁵⁹ Participants who answered, ‘yes’ to question 1b in the initial participant survey “After attending [event] would you say your degree of connectedness and engagement with [location] central business district has changed?” filtered by those who answered ‘somewhat disconnected and engaged’ or ‘very disconnected and disengaged’ to question 1a in the same survey [Total sample; base n=3,195; total n=3,247; 52 responses excluded].

attending events tended to view CBDs in a more positive light.

“I think the revitalisation of the space has opened my eyes to the food, feeling & convenience of the culture of Haymarket” participant at Pleasures Playhouse Theatre and Bar

“It made me rethink what I thought of the place. I hadn't been there in so long - I forgot how great the community is! Great restaurants, good vibes. I will definitely make more of an effort to go to Manly more often.” participant at Manly Alive Encore Festival

“It has changed from strictly thinking about Barangaroo as my place of work to somewhere to spend dining on the weekend and exploring the area outside of work. Really nice to see it busy on the weekend since COVID” participant at Barangaroo Food & Wine Festival

Table 8: Mean attribute scores of all CBDs combined by event attendance

Source: UTS IPGG Population survey final report, Table 11 (Section 5.1).

	Attended an event	Did not attend an event
Diverse	7.8	7.3
Safe	7.6	7.1
Inclusive	7.5	6.9
Accessible	7.9	7.4
Vibrant	7.4	6.5
Bustling	7.3	6.6
Clean	7.3	6.7
Unique	7.3	6.3
Affordable	6.8	6.3
Green	6.9	5.9
n=	862	2,879

Participants indicating that they felt re-connected with both CBD areas and communities after attending events is consistent with research that shows social offerings are the most significant drivers of community attachment. This is particularly the case for arts and cultural opportunities, social community events, and a vibrant nightlife, which have elsewhere been demonstrated to have the most significant impact on survey respondents’ level of community attachment.⁶⁰ A positive correlation between community attachment and local GDP growth has also been identified, with cities attracting the highest levels of attachment showing the greatest GDP growth.⁶¹

Event attendance had a positive influence for less likely visitors.

Two thirds of participants who indicated being previously disconnected with the supported CBD area (65 per cent) reported that their connectedness and engagement changed after the event.

Event participants cited extended travel times, pandemic-related hesitancy, a lack of family-friendly

⁶⁰ Gallup Knight Soul of the Community), “Why People Love Where They Live and Why it Matters: A National Perspective”, 2010, accessed March 2023.

⁶¹ Ibid.

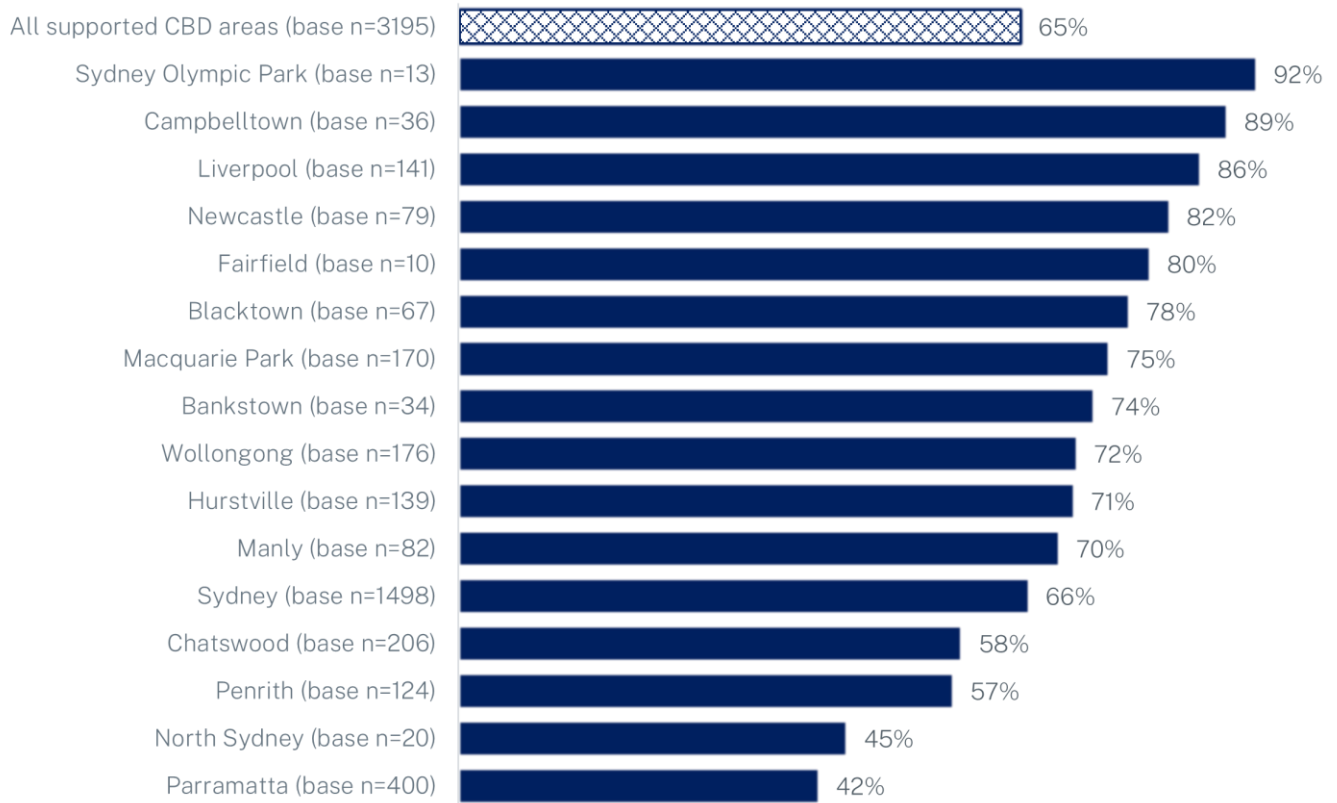
activities and affordability as reasons why some felt disconnected from CBD areas prior to event attendance. Other factors that may have influenced CBD visitation and connectedness and engagement in general are discussed further in **Learning Two**.

Encouragingly, Program events changed perceptions and connectedness for many people considered to be previously disconnected from their CBD. Noting small sample sizes, survey results indicated that changes in the levels of connectedness and engagement among previously disconnected event participants were most prominent in Sydney Olympic Park (92 per cent), Campbelltown (89 per cent), Liverpool (86 per cent), Newcastle (82 per cent) and Fairfield (80 per cent) (Figure 15). The events that elicited higher levels of changes to connectedness and engagement were more likely to also improve these sentiments in previously disconnected participants (

Table 9b). Analysis of free text responses among these cohorts found that the majority indicated that their change in connectedness and engagement was positive.

Figure 15: Levels of connectedness and engagement with CBD after event participation among those previously disconnected

Source: Participants who answered, 'yes' to question 1b in the initial participant survey "After attending [event] would you say your degree of connectedness and engagement with [location] central business district has changed?" filtered by those who answered 'somewhat disconnected and engaged' or 'very disconnected and disengaged' to question 1a in the same survey [Total sample; base n=3,195; total n=3,247. 52 responses excluded].

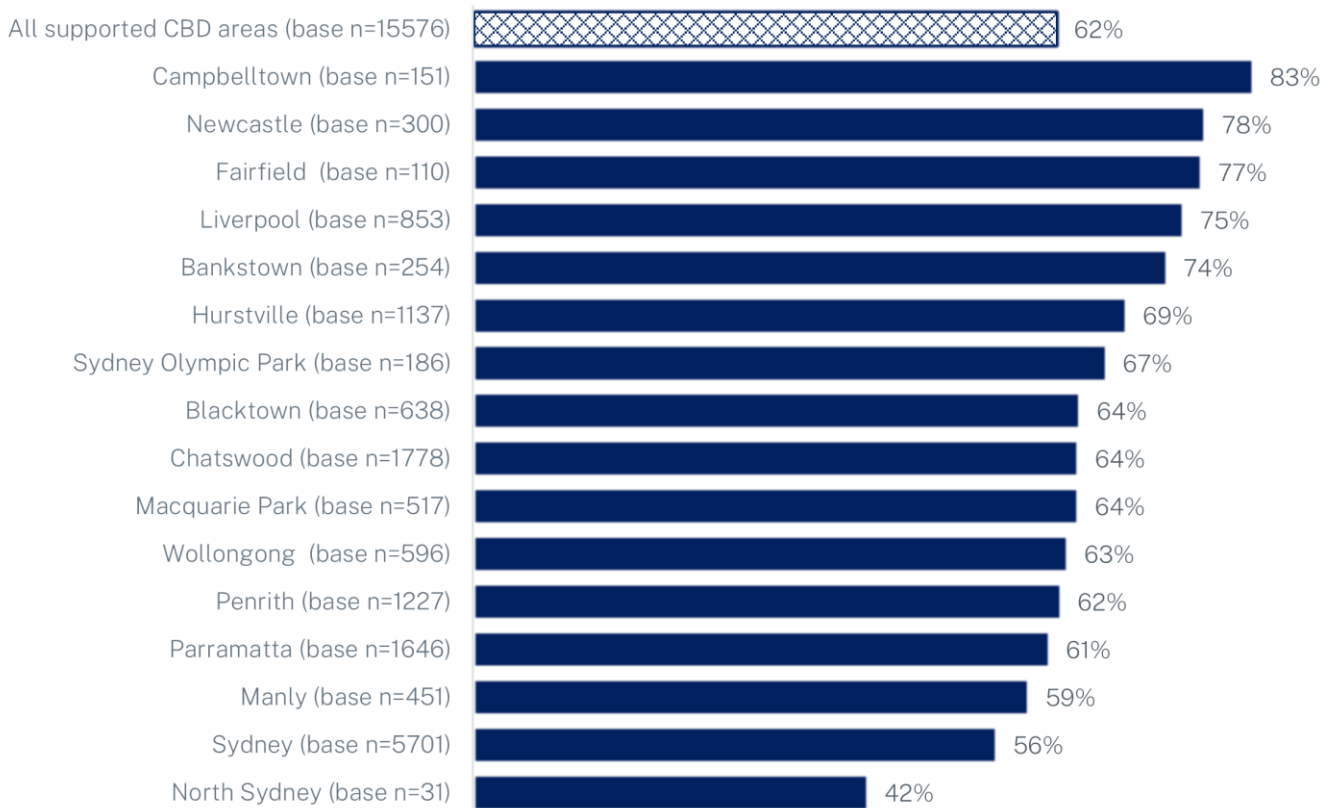


At an overall level, there were strong improvements in connectedness and engagement with Western Sydney CBDs among event participants.

Events in Western Sydney CBD areas were generally a strong driver for visitation (**Finding One**). Similarly, greater proportions of participants at events in these areas tended to report increased connectedness and engagement with the supported CBDs. Campbelltown, Fairfield, Liverpool and Bankstown CBD areas exhibited some of the highest proportions of participants indicating an improvement in their levels of connectedness and engagement (83, 77, 75, and 74 per cent of event participants respectively) (Figure 16)

Figure 16: Levels of connectedness and engagement with CBD after the event participation

Source: Participants who answered, 'yes' to question 1b in the initial participant survey "After attending [event] would you say your degree of connectedness and engagement with [location] central business district has changed?" [Total sample; base n=15,576; total n=15,916. 340 responses excluded].



At an event level, Western Sydney events Park Sounds (Mar-May) (94 per cent), and Liverpool Winter Blast (85 per cent), as well as Pleasures Playhouse Theatre and Bar in Sydney CBD (85 per cent) demonstrated the strongest improvements to levels of connectedness and engagement with the supported CBD area after the event (

Table 9). These were followed by Wollongong's Luminous (81 per cent) and Newcastle's Autumn Alice: City Activation Series (78 per cent).

Table 9: Event as a key factor for visitation and change in connectedness and engagement - top five events showing the biggest changes in connectedness and engagement

Source:

- a) Participants who answered 'yes' to question 1b in the initial participant survey "After attending [event] would you say your degree of connectedness and engagement with [location] central business district has changed?" [Total sample; base n=15,576; total n=15,916. 340 responses excluded].
- b) Participants who answered, 'yes' to question 1b in the initial participant survey "After attending [event] would you say your degree of connectedness and engagement with [location] central business district has changed?" filtered by those who answered 'somewhat disconnected and engaged' or 'very disconnected and disengaged' to question 1a in the same survey [Total sample; base n=3,195; total n=3,247. 52 responses excluded].

Event name	CBD area supported	(a) % of participants changing levels of connectedness and engagement with the CBD area after the event	(b) % of participants being previously disconnected with the CBD area and changing levels of connectedness and engagement after the event
Park Sounds (Mar-May) (base n=31)	Sydney Olympic Park	94%	92%
Liverpool Winter Blast (base n=508)	Liverpool	85%	91%
Pleasures Playhouse Theatre and Bar (base n=60)	Sydney	85%	91%
Luminous (base n=177)	Wollongong	81%	87%
Autumn Alive: City Activation Series (base n=300)	Newcastle	78%	82%

Results from the population survey indicated that the Western Sydney CBD areas were perceived as being diverse, affordable and accessible. These areas performed less well, however, on measures of safety, cleanliness and vibrancy when compared to other CBDs. The observed improvements in connectedness and engagement among visitors to Western Sydney CBD areas and qualitative feedback on participant experience suggests an opportunity to improve these perceptions and challenge misconceptions.

“It’s nice to breathe life into Liverpool again. I feel like there has been a lot of negative things happen in the area over the last 10 years and it’s good to see so many families out and about” participant at Liverpool Winter Blast

“I felt so welcomed and included, something I have never felt from a community before” previously disconnected participant at Blacktown by Night

“Learned more and broadened my views on Penrith and its rather impressive business district” previously disconnected participant at ICONIC - A Penrith cultural celebration



Learning One: There are external factors that affect visitation and engagement with CBD areas. For this Program, these included the easing of pandemic related behaviours and a shift towards greater visitation of CBD areas for business/work purposes over the duration of the Program.

The perceived risk of contracting COVID-19 reduced over the duration of the Program.

With the progressive easing of pandemic related restrictions and an increase in vaccination rates, 2022 brought a shift in perceptions of NSW residents around COVID-19 risk, particularly during the second half of the year.

The population research conducted for this evaluation revealed that the perceived risk of contracting COVID-19 across 2022 peaked in the August survey. This was in line with increased COVID-19 infections in the community at this time. August also saw a peak in the proportion of respondents who indicated that COVID-19 would impact their decision to attend events in CBD areas.⁶²

The proportion of NSW residents who believed that there is an ongoing risk of contracting COVID-19 decreased markedly between August and October 2022 (from 74 per cent to 59 per cent, a drop of 15 percentage points). A similar trend was observed in the proportion of respondents who believed that the risk of contracting COVID-19 was higher in CBD areas than other locations (dropping by 10 percentage points between August and October 2022, from 58 per cent to 48 per cent (Figure 17)

Consistent with perceptions of the risk of contracting COVID-19, there was a decrease in the proportion of respondents who agreed that COVID-19 would impact their decision to attend events in CBD areas between August and October (57 per cent to 42 per cent). As shown in Figure 18, there was similarly a 13 percentage point drop in the proportion of respondents who agreed that COVID-19 would impact their decision to attend events outside of CBD areas over this period (53 per cent to 40 per cent).

“Post COVID life has returned to a new normal. I am going out and doing things mostly in the same way as I previously did”

“COVID is less of a threat. Our children are getting a bit older so less house bound. I'd like to start going out into Sydney CBD for cultural events”

“I have been cautious about visiting the CBD during COVID but have started taking a few more risks lately. If nothing changes with the COVID situation, I would like to return to spending time in the CBD”

Respondents to UTS IPGG CBDs Revitalisation Population survey

⁶² Appendix C, Section 4.1.

Figure 17: Perceived risk of contracting COVID-19

Source: Reproduced from IPGG CBDs Revitalisation Population survey final report, Figure 18 (Section 4.1). Due to rounding some values may total higher.

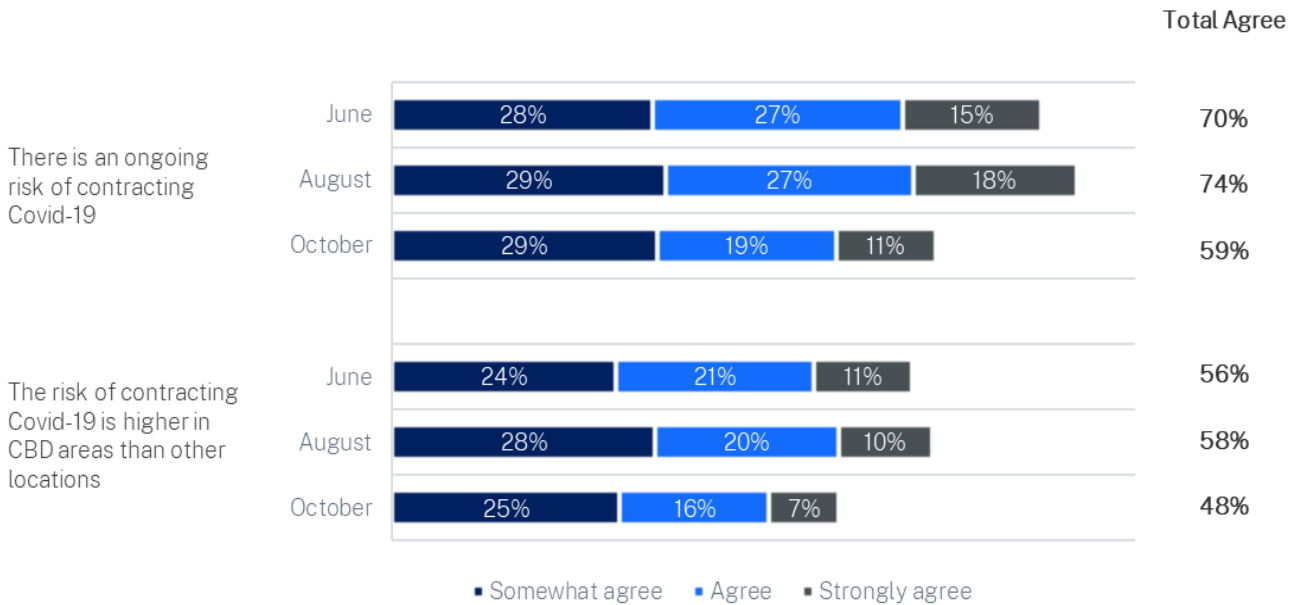
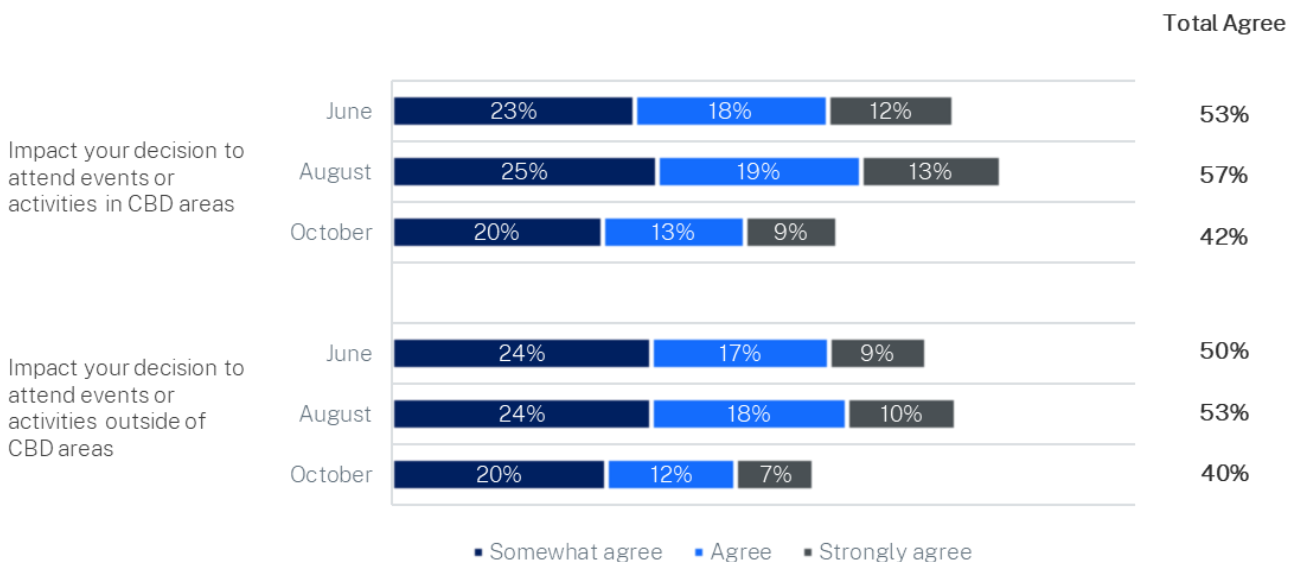


Figure 18: COVID-19 influence on decision to attend events

Source: Reproduced from IPGG CBDs Revitalisation Population survey final report, Figure 19 (Section 4.1). Due to rounding some values may total higher



There appears to have been an increase in the return to CBD areas for business activities.

Over the same period, there has been a shift towards greater visitation to CBD areas for business (work or study) purposes. This is consistent with the increase in occupancy rates in the Sydney CBD seen between May and September (41 per cent to 52 per cent).^{63,64} Similarly, between June and August 2022, there was an increase of 8 percentage points in the proportion of respondents to the population survey who indicated work or study was the primary purpose of their recent visit to the Sydney CBD (30 per cent to 38 per cent). This further stabilised by October 2022 (39 per cent).

The onset of COVID-19 and subsequent restrictions resulted in approximately half of the NSW

⁶³ Business News Australia, "Office occupancy rates on the up in majority of Australian CBDs", 2022, accessed April 2023.

⁶⁴ CI Australia, "Sydney CBD Office Market Report", 2022, accessed April 2023.

workforce over 18 years of age working from home most days between August and September 2020.⁶⁵ While this was seen as a temporary adjustment, a structural shift in flexible work practices was anticipated. A survey conducted by the *NSW Innovation and Productivity Council (IPC)* during the same period in 2020 suggested that NSW businesses and employees were anticipating an increase in remote working (up to 30 per cent of the labour market working remotely) relative to prior to the pandemic (where 18 per cent of people surveyed worked remotely).⁶⁶ The population survey results indicate an increase in the proportion of visitation to CBD areas for work. However, low average occupancy rates in major cities – particularly in Sydney and Melbourne, compared to pre pandemic levels⁶⁷ indicate that flexible work arrangements and working from home are likely to continue to some extent over time.

It was noted from the outset of this evaluation, that external factors such as these would impact on desired Program outcomes and hence need to be considered when examining program success.

For example, a decreased level of concern about contracting COVID-19 may have enhanced the Program's ability to attract attendees and thus increase CBD visitation. It is also likely that in the absence of the Program, the reduction in concerns around contracting COVID-19 would have led to some increase in CBD visitation.

Shifts in where work occurs will also have ongoing impacts on how people visit and engage with various CBD areas. This may have differing impacts across locations, particularly outside of established metropolitan and strategic centres.



Learning Two: There are barriers to CBD visitation for NSW residents including sentiment towards public transport and perceptions of affordability of some CBDs.

A desire for better transport (e.g. more late-night services and better parking) was reported in the population survey.

While survey results suggest Program events induced CBD visitation, they also revealed barriers limiting people's engagement with certain locations. Across the Greater Sydney, Wollongong and Newcastle regions, access to reliable and affordable public transport remains a significant barrier to CBD visitation according to responses from the population survey. Some residents noted wanting to visit and support CBDs, as well as wanting to stay longer in CBDs, but reported that a lack of transport options was a barrier to them doing this.

Other factors impacting length and likelihood of visitation included some perceptions, particularly among women, around night time public transport being 'unsafe', as well as a lack of parking facilities, and a perception of the prohibitive cost of parking.⁶⁸

The desire for better transport was particularly strong among residents who hadn't visited any CBD

⁶⁵ Australian Bureau of Statistics, "[Household Impacts of COVID-19 Survey](#)", 2020, accessed April 2023.

⁶⁶ NSW Innovation and Productivity Council, "[NSW Remote Working Insights: Our experience during COVID-19 and what it means for the future of work](#)", 2020, accessed April 2023.

⁶⁷ Business News Australia, "[Office occupancy rates on the up in majority of Australian CBDs](#)", 2022, accessed April 2023.

⁶⁸ Appendix C, Section 3.4.

area in the previous week (61 per cent), women (59 per cent), and those from a CALD⁶⁹ background (55 per cent). This may suggest that improved transport would encourage these cohorts to visit CBDs more regularly.⁷⁰

The highest number of visits on average to supported CBDs the week prior were from respondents residing in South West Sydney (4.5 visits), Inner South West (4.4 visits), Sydney City (4.4 visits), Inner South (4.4 visits) and Parramatta (4.2 visits).⁷¹ These SA4 areas are in relatively close proximity to multiple CBD areas with better public transport connections which may be a factor in the observed higher levels of visitation.

More than half of the respondents to the population survey (55 per cent) selected better transport as one of the three most important areas for future NSW Government investment to help revitalise CBD areas.⁷² This sentiment was consistent across respondents from Greater Sydney, Wollongong and Newcastle, highlighting a universal desire for improvements to transport, potentially impacting NSW residents' participation in CBDs.

Perceived affordability of some CBD areas may have impacted CBD visitation.

Despite perceptions of the risk of contracting COVID-19 easing during the lifespan of the Program, cost-of-living pressures emerged as a considerable risk to the momentum of CBD revitalisation, particularly for the Sydney CBD.

Between June and October 2022, in an environment of rising interest rates and inflation, Sydney CBD's mean perceived affordability score reduced significantly by 1 point, from 6.5 to 5.5 out of 10.⁷³ During this same period, reported visitation of the Sydney CBD decreased significantly by 7 percentage points.⁷⁴

This may suggest a potential link between the perceived affordability and visitation of CBDs.

While there is evidence to suggest that Program events and the easing of pandemic-related concerns has made the general population less hesitant to visit CBD areas, these reported barriers may have limited the potential impact of the Program. Concerns from the community around transport and perceived affordability may continue to present a challenge to maximising the social and economic benefits of CBD revitalisation, particularly limiting the engagement of some cohorts with CBD areas.

⁶⁹ Culturally and linguistically diverse.

⁷⁰ Appendix C, Section 5.2

⁷¹ Appendix C, Section 3.1.1.

⁷² Appendix C, Section 5.2.

⁷³ Appendix C, Section 5.1.

⁷⁴ Appendix C, Section 3.1.2.

“Train systems are getting worse, if I wanted to travel by public transport, and also the price of fuel is expensive”

“More often than not poor transport options for late night will stop me and my friends from going out to CBD areas”

“With the increasing cost of living expenses my family and I are going out less and staying home more. I can’t see this changing in the next 6 months”

“Hosting more events does attract people to the city, like Vivid. But you need more late-night service to enable people to actually stay out late in the city. Parking is costly and too difficult to find”

Respondents to UTS IPGG CBDs Revitalisation Population survey



Finding Five: There are indications that future CBD visitation and engagement will be influenced by events and activations.



3.3

visits to CBD areas per week made on average by residents of Greater Sydney, Wollongong and Newcastle between June and October 2022⁷⁵



69%

of participants who attended the supported CBD in the past week (3 months post event), indicated they were more inclined to revisit the supported CBD area since the event⁷⁶



74%

of participants who attended the supported CBD in the past week (3 months post event), indicated their visit had been influenced by events and things to do⁷⁷

Self-reported levels of visitation to CBD areas were relatively stable during the population survey period.

Across the three survey rounds, respondents to the population survey made on average 3.3 visits to CBD areas per week. Over the same six-month period approximately eight in ten residents of Greater Sydney, Wollongong and Newcastle (84 per cent) indicated having visited a CBD area at least once within the previous week. Over a quarter of those surveyed consistently reported having made five or more CBD visits in the week prior (

⁷⁵ IPGG CBDs Revitalisation Population survey final report, Section 3.1.

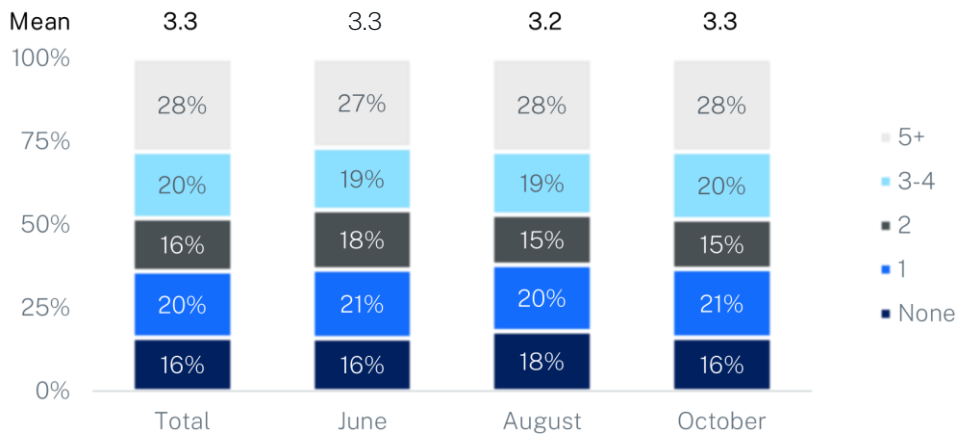
⁷⁶ Participants who answered, ‘yes’ to question 3d in the follow-up survey “After attending [event] would you say you have been more inclined to visit [location] central business district? [Total sample; base n=1,597; total n=1,988. 391 responses excluded].

⁷⁷ Participants who answered, ‘a significant amount’ or ‘a moderate amount’ to question 3c in the follow-up survey “Which statement best reflects the influence that events and things to do in the [location] central business district had on your decision to spend time there in the last week?” [Total sample; base n=1,619; total n=1,988. 369 responses excluded].

Figure 19).

Figure 19: Number of CBD visits in the past week

Source: IPGG CBDs Revitalisation Population survey final report, Figure 7 (Section 3.1).



This stability of visitation across CBDs in general was also consistent with results from the participant surveys which focused on visitation of the specific CBD in which the event was held. Between the initial and follow-up participant surveys, there was only a minor increase in the average number of days event attendees reported spending in the supported CBD the week prior (1.8 and 2.0 days respectively).⁷⁸

This was generally in line with other self-reported data around CBD visitation, with approximately half of the population survey respondents indicating their CBD visitation had remained the same over the last 6 months (48 per cent) (Figure 20). A similar proportion predicted that their CBD visitation over the next 6 months would remain the same (53 per cent) (Figure 21).

Nevertheless, around four in ten respondents consistently indicated across all survey rounds that their CBD visitation was expected to increase over the next six months (Figure 21). It is unclear whether this anticipated increase in visitation was linked to business factors e.g. expectations around office attendance, or to a desire to engage in recreational opportunities. Survey data as of October 2022 did not suggest that this anticipated increase in CBD visitation had fully materialised. This could be due to a range of reasons including a potential lag between changes in attitude and changes in regular behavioural patterns.

⁷⁸ Participants who answered question 3a in the initial participant survey “In the week prior to today how many days did you spend some amount of time in [location] central business district?” [Total sample; base n=14,524; total n=15,220. 696 responses excluded] and participants who answered follow-up survey question 3a “In the week prior to today how many days did you spend some amount of time in [location] central business district?” [Total sample; base n=1,961; total n=1,988. 27 responses excluded].

Figure 20: CBD visitation over the last six months⁷⁹

Source: IPGG CBDs Revitalisation Population survey final report, Figure 20 (Section 4.1.1).

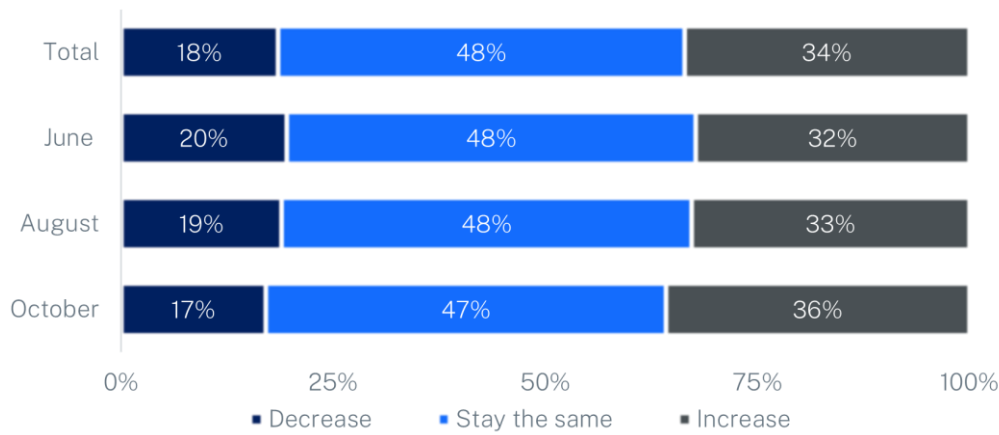
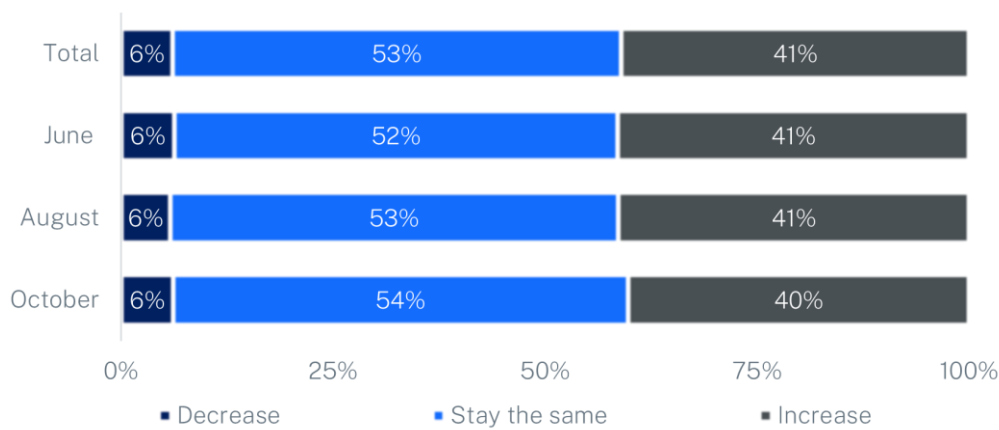


Figure 21: CBD visitation intention for the next six months

Source: IPGG CBDs Revitalisation Population survey final report, Figure 21 (Section 4.1.2).



Year-on-year analysis of Opal card data suggests longer term upwards movement in public transport usage.

Whilst travel to CBD areas has not reached pre-pandemic levels, year-on-year analysis of Transport for NSW data reveals an uptick in Opal card tap offs at transport stops in close proximity to supported program events across 2022. (Figure 22). Overall, visitation to supported areas increased by approximately 39 per cent between 2021 and 2022.

Comparatively, public transport usage in NSW overall increased by 33 per cent between 2021 and 2022 across the network, suggesting an overall patronage recovery after the almost four month lockdown during the Omicron wave in 2021.⁸⁰

While it cannot be ascertained whether (or to what degree) the slightly larger increase in visitation to transport stops in close proximity to program events reflects Program events or other factors influencing visitation of CBDs, it is apparent that public transport usage has increased notably over the program period compared to the year prior.

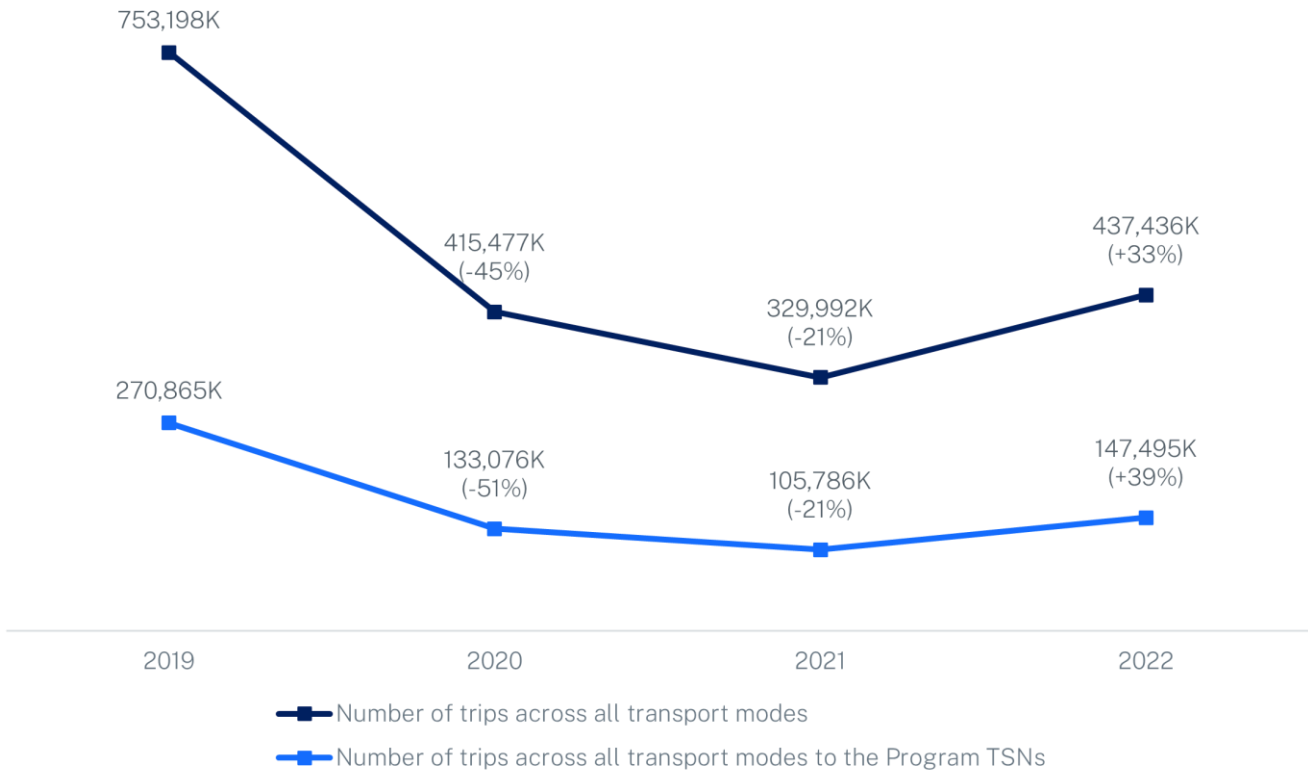
⁷⁹ Due to rounding, some series totals do not equal 100%.

⁸⁰ Transport for NSW Open data. “Opal trips – all modes”, accessed June 2023

Figure 22: Annual Opal card tap offs near event locations

Source:

- a) Transport for NSW Open data platform (Number of trips across all transport modes). Opal daily tap-on/tap-off data is aggregated to a total yearly figure representing the estimated number of trips across all transport modes. Percentage difference from the previous year is shown in parentheses. Note that tap-on/tap-off data is rounded, and percentages reflect raw figures.
- b) Transport for NSW data for the Program TSNs (Number of trips across all transport modes to the Program TSNs). Opal card tap-off data has been aggregated by year for all TSNs in proximity to funded event locations. Percentage difference from the previous year is shown in parentheses. Note that tap-on/tap-off data is rounded, and percentages reflect raw figures.



At a monthly level, notwithstanding a dip in visitation between June and July 2022, Opal card tap offs to areas associated with events increased by approximately 26 per cent between March to October 2022, i.e. the Program period (Figure 23). This reflects an increase from approximately 11 million tap offs in March at Program commencement to 14 million tap offs in October 2022 upon Program conclusion. During the same period, across the broader network the number of trips increased by 22 per cent, from approximately 34 million trips in March to 42 million in October 2022.

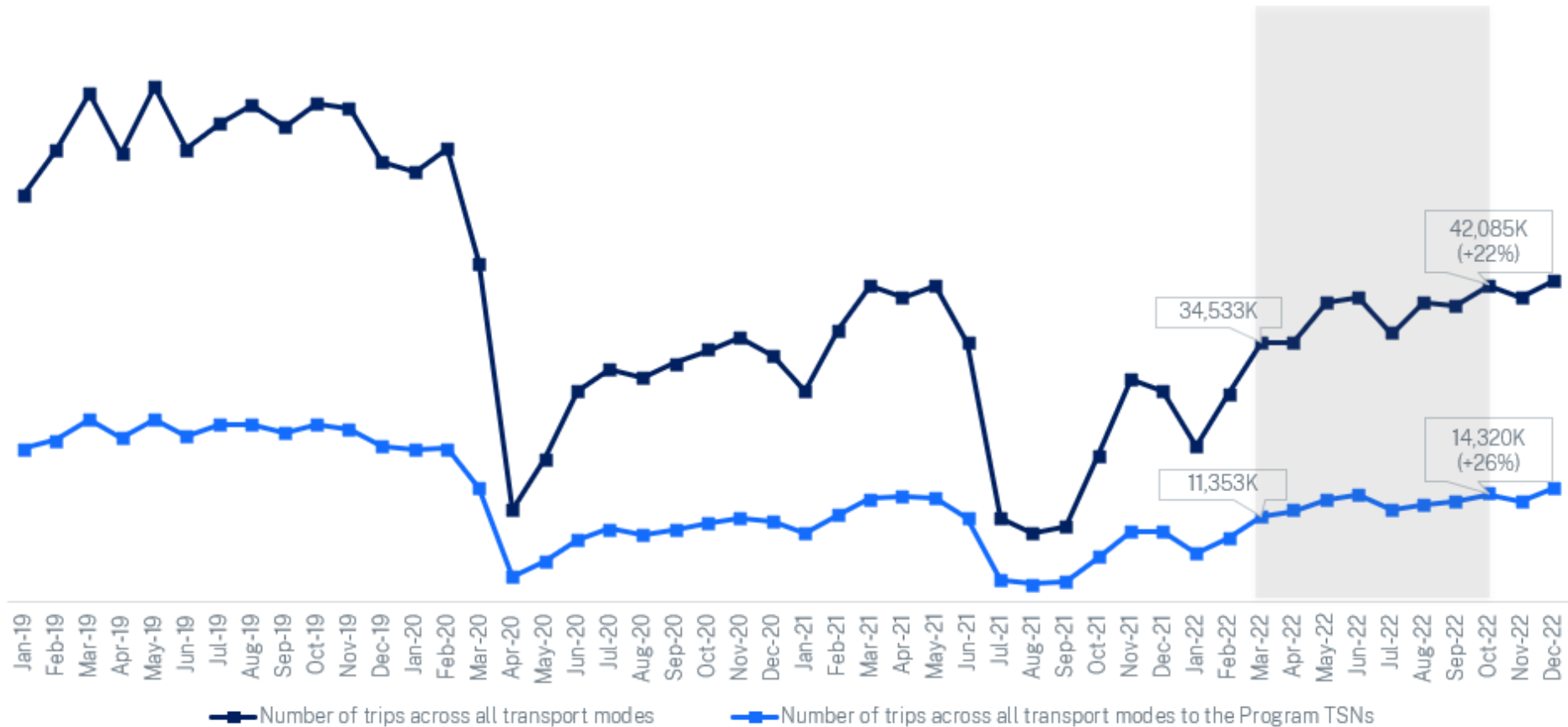
While average weekday public transport use remains lower than pre-COVID-19 levels, more recent Transport for NSW data demonstrates a further upwards trend in public transport use in 2023, suggesting that increased levels of CBD visitation are being sustained.⁸¹

⁸¹ The Guardian Australia “New normal? Sydney and Melbourne public transport use still at 80% of pre-Covid levels”, 2023, accessed May 2023

Figure 23: Monthly Opal card tap offs near event locations⁸²

Source:

- a) Transport for NSW Open data platform (Number of trips across all transport modes). Opal daily tap-on/tap-off data is aggregated to a total monthly figure representing the estimated number of trips across all transport modes. Percentage difference from commencement of the Program period; March 2022, to the Program conclusion; October 2022, is shown in parentheses. Note that tap-on/tap-off data is rounded, and percentages reflect raw figures.
- b) Transport for NSW Opal data for TSNs in proximity to Program events (Number of trips across all transport modes to specified TSNs). Opal card tap-off data has been aggregated by month for all the TSNs in proximity to funded event locations. Percentage difference from commencement of the Program period; March 2022, to the Program conclusion; October 2022, is shown in parentheses. Note that tap-on/tap-off data is rounded, and percentages reflect raw figures.

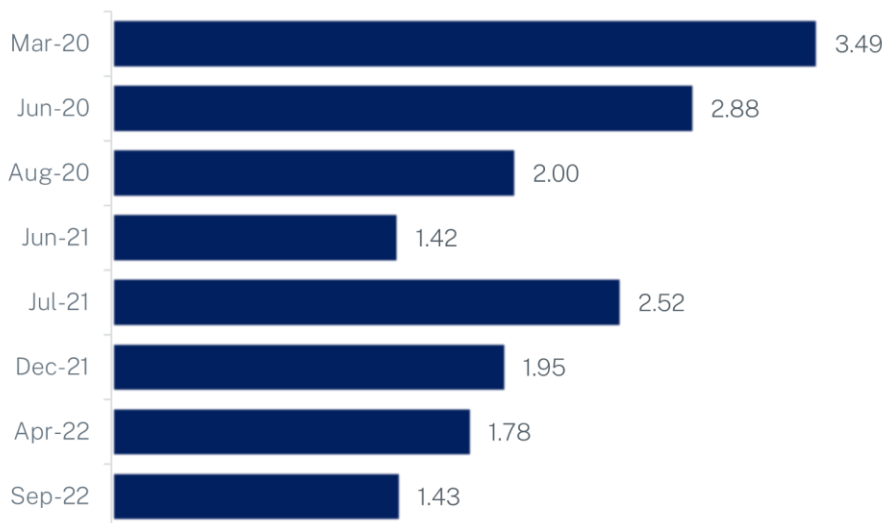


⁸² Program period (March – October 2022) is shaded in grey. The period included major events (Vivid Sydney 27 May – 18 June), school holiday periods (11-25 April, 4-15 July, and 26 September – 7 October), and transport industrial action periods (Bus: 11 April and 6 May, and Train: 28 June – 1 July and 10, 17, 23, 25, and 31 August).

The number of people working from home has been noted as a major influence over movement patterns to CBD areas.⁸³ Surveying conducted by the Institute of Transport and Logistics Studies indicated that the average number of days working from home in Sydney reduced by approximately 2 days (3.49 days to 1.43 days) between March 2020 and September 2022 in respondents undertaking paid work in the preceding two-week period (Figure 24).⁸⁴ During the Program period, the average number of days working from home in Sydney reduced by approximately a third of a day (1.78 days in April 2022 to 1.43 days September 2022), suggesting that a gradually increasing number of commuters are likely travelling to CBD areas for business or work.

Figure 24: Average number of days working from home in Sydney – March 2020 – September 2022

Source: Replicated from the Transport Opinion Survey. Institute of Transport and Logistics Studies.



It is difficult to attribute increased visitation levels to a single variable. The observed rise in CBD visitation likely reflects a range of factors including pandemic recovery initiatives such as this Program, easing concerns around COVID-19, a progressive return to greater time in the office amongst business commuters, and increased visitation among domestic and international tourists.⁸⁵

In an environment where cost of living pressures have been rising, reported average daily expenditure in CBD areas remained fairly consistent.

Event participants were asked in both the initial and follow-up surveys about their average daily spend last week while in the supported CBD location. As indicated in Figure 25, broad spending patterns among attendees appear to have remained fairly stable over time. There has been a slight increase in the proportion of attendees falling into the lower spend brackets and a slight decrease in the higher spend brackets, although it is important to note this occurred during a period of rising inflation and interest rates which may have affected discretionary spend.

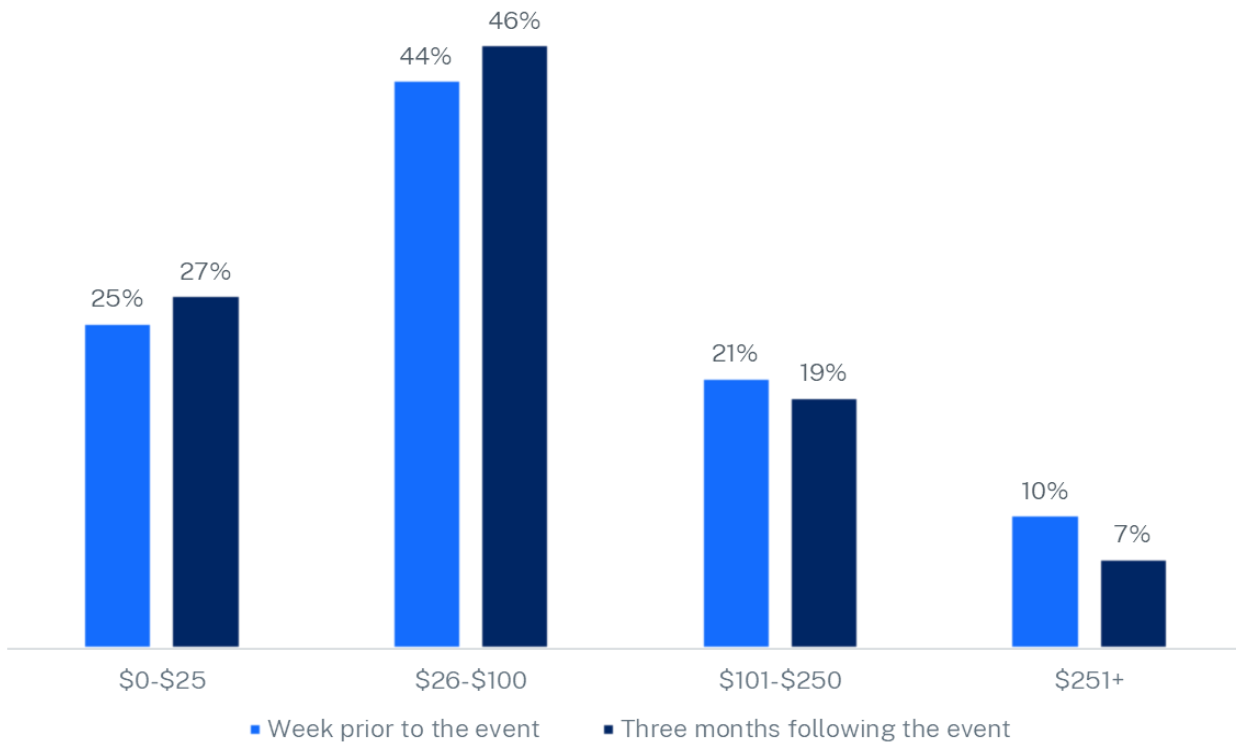
⁸³ The Sydney Morning Herald “New normal’: Project Phoenix reveals future of Sydney public transport”, 2022, accessed May 2023

⁸⁴ University of Sydney Business School “Transport Opinion Survey: understanding how the community views transport”, 2022, accessed May 2023

⁸⁵ Destination NSW, “Sydney Tourism Statistics, 2022”, accessed June 2023.

Figure 25: Average daily participant spend in CBD area the week prior to the event and three months following the event

Source: Participants who answered question 4 in the initial participant survey “On average how much did you spend per day, last week while in [location] central business district?” [Total sample; base n=10,184; total n=15,916. 5,732 responses excluded] and participants who answered follow-up survey question 4 “On average how much did you spend per day, last week while in [location] central business district?” [Total sample; base n=1,301; total n=1,988. 687 responses excluded].



Event participation influenced intention to revisit CBDs.

Despite relative stability in overall reported visitation over time, the follow-up survey of event participants revealed that seven in ten (69 per cent) have felt more inclined to visit the supported CBD area after attending the event. Those who attended events in the Bankstown (88 per cent), Parramatta (88 per cent), and Blacktown (71 per cent) CBD areas were the most likely to indicate that they had been more inclined to visit the supported CBD following the event.⁸⁶

This potentially aligns with results of the population survey which found that a majority of respondents who had recently increased their CBD visitation expected visitation to increase further during the next 6 months (68 per cent).⁸⁷ This suggests that attending an event may be linked to having a higher propensity to return to CBD areas.

Those more inclined to visit the supported CBD area after attending an event, visited more frequently and reported higher expenditure during repeat visits.

The participant follow-up survey revealed differences in frequency of CBD visitation among those who reported feeling more inclined to visit the CBD area following event attendance compared to those who did not. In the week prior, those more inclined to visit indicated spending 2.12 days on average in the supported CBD, compared to 1.64 days among those no more inclined to visit post-

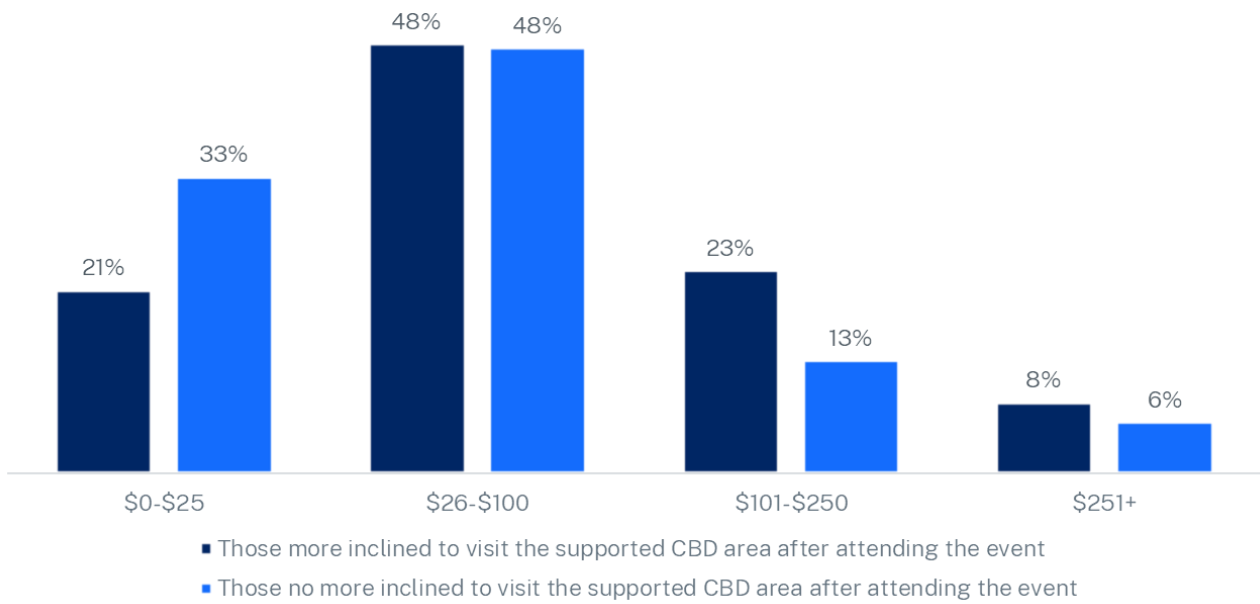
⁸⁶ Participants who answered, ‘yes’ to question 3d in the follow-up survey “After attending [event] would you say you have been more inclined to visit [location] central business district?” [Total sample; base n=1,597; total n=1,988. 391 responses excluded].

⁸⁷ Appendix C, Section 4.1.2.

event.⁸⁸ Likewise, three months following event attendance, a greater proportion of those more inclined to visit after attending the event indicated high levels of daily spend in the supported CBD (\$101 or more) compared to no more inclined to visit (31 per cent compared with 19 per cent) (Figure 26). This suggests a potential relationship between feeling more engaged with a CBD and being more likely to visit CBDs and spending more money in CBD areas.

Figure 26: Average daily participant spend three months following the event – comparison between those more inclined to visit the supported CBD area after attending the event and those no more inclined to visit the supported CBD area after attending the event

Source: Follow-up survey of participants. Responses to question 4 "On average how much did you spend per day, last week while in [location] central business district?" filtered by those who answered, 'yes' or 'no' to question 3d "After attending [event] would you say you have been more inclined to visit [location] central business district?" [Total sample; base n=1,049; total n=1,597. 548 responses excluded].



⁸⁸ Participants who answered 1, 2, 3, 4, 5, 6, or 7 days to question 3a in the follow-up survey "In the week prior to today how many days did you spend some amount of time in [location] central business district?" by those who answered, 'yes' compared to those who answered 'no' to question 3d "After attending [event] would you say you have been more inclined to visit [location] central business district?" [Total sample; base n=1,593; total n=1,597; 4 responses excluded].

There is a continued appetite from the NSW community for events and activations to boost CBD visitation and engagement.

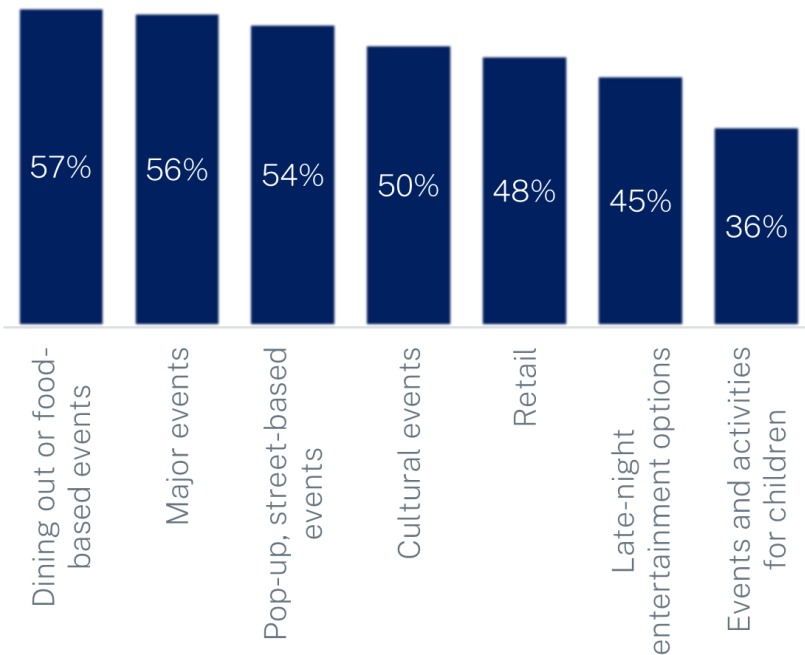
Events and activation activities continued to be an influence for a majority of participants making repeat visits to the supported CBD area three months following the event. Among those who had visited the supported CBD area the week prior to the follow-up survey, seven in ten participants (74 per cent) were influenced by events and things to do.⁸⁹ Encouragingly, this cohort spent on average approximately half a day longer in the area compared to those who were not influenced by events and things to do when making their repeat CBD visit (2.36 days and 1.95 days respectively).⁹⁰

The population survey revealed a strong appetite for more events from the NSW community. When asked for their views on the three most important areas for NSW Government investment to help revitalise CBD areas, supporting smaller street-based events (33 per cent) and local businesses (32 per cent) were both ranked as important by NSW residents.⁹¹

Dining out or food-based events were reported as the most popular types of events that would encourage CBD visitation (57 per cent), with major events (56 per cent), pop-ups and street-based events (54 per cent) also being reported as preferred activities that would encourage visitation or more time spent in CBD areas (Figure 27).

Figure 27: Types of events and activations that promote CBD visitation

Source: IPGG CBDs Revitalisation Population survey final report, Figure 27 (Section 5.3).



⁸⁹ Participants who answered, ‘a significant amount’ or ‘a moderate amount’ to question 3c in the follow-up survey “Which statement best reflects the influence that events and things to do in the [location] central business district had on your decision to spend time there in the last week?” [Total sample; base n=1,619; total n=1,988. 369 responses excluded].

⁹⁰ Participants who responded 1, 2, 3, 4, 5, 6, or 7 days to question 3a in the follow-up survey “In the week prior to today how many days did you spend some amount of time in [location] central business district?” by those who answered, ‘a significant amount’ or ‘a moderate amount’ compared to those who answered “very little” or “none” to question 3c “Which statement best reflects the influence that events and things to do in the [location] central business district had on your decision to spend time there in the last week?” [Total sample; base n=1,619; total n=1,619. 0 responses excluded].

⁹¹ Appendix C, Section 5.2.

Together,

- the impact of event attendance on future visitation inclinations
- the general influence of events and things to do in driving CBD visitation, and
- a desire among NSW residents for further events,

suggest ongoing potential for events and activations to drive increased CBD visitation.

4

Conclusions

This outcome evaluation assesses the degree to which the desired short and medium term outcomes of the Program were achieved, considering the key evaluation questions as outlined in **Section 2.1**.

The findings from this evaluation indicate that the Program has positively contributed to the social and economic participation of NSW residents in supported CBDs across the Greater Sydney, Newcastle and Wollongong areas.

Although concerns around the risk of contracting COVID-19 decreased throughout the life of the Program, likely enhancing willingness to engage with events, there is strong evidence that the Program increased visitation and improved sentiment towards CBD areas.

In summary:

1. The Program induced visitation to CBD areas that otherwise may not have occurred or would have occurred later.
2. Awareness and attendance of events tended to be localised.
3. Visitation led to time spent and expenditure within the CBD areas.
4. Program events changed participants' levels of connectedness and engagement with CBD areas.
5. Despite visitation to CBD areas remaining stable during the course of the Program, a majority of participants were more inclined to return to CBD areas after attending an event.

In combination, the findings above and grant recipient reporting on the number of businesses supported through Program events suggests that the adverse economic impacts from the COVID-19 pandemic were likely lessened in CBDs supported by the Program.

While there may be a lag between a change in attitudes towards CBDs and a change in behaviour to visit CBDs more often, this evaluation found a willingness to re-engage with CBDs among NSW residents and an appetite for further events and activations in CBD areas. It also identified some underlying barriers to CBD visitation that should be considered in the design of potential future initiatives, including concerns around transport and perceptions of the affordability of some CBD areas.

Whether or not the Program sustains long term visitation of CBDs remains to be seen. Partly working from home and changes in how residents interact with their local communities are likely to bear influence. Through achieving desired short and medium term outcomes, however, the Program has maximised its chances of achieving longer term success.

5

Appendices

Appendix A – Program logic

Figure 28: Program logic

Program Objective: to accelerate the economic and social recovery of CBDs across Greater Sydney, Newcastle and Wollongong.

To achieve this the Program will provide targeted support for events to attract people back to CBDs, and to increase their connectedness and engagement with these locations.

Issue or problem and cause	Target population	Activities	Outputs	Short term outcomes	Medium term outcomes	Long term outcomes
<p>The pandemic has presented both a public health and economic challenge to the State.</p> <p>In CBDs this economic challenge has been most acute due to:</p> <ul style="list-style-type: none"> the stickiness of pandemic-induced behaviour, which is resulting in a slower return to CBDs a perceived lack of events, or sense of connectedness and engagement with CBDs. 	<p>NSW population, interstate or international visitors that are willing to visit eligible CBDs however, have stopped visiting or are visiting less often.</p>	<p>Program information developed and grant applications sought.</p> <p>Operational protocols developed</p> <p>Contracts executed</p> <p>Program inputs</p> <p>\$50 million funding over three rounds</p>	<p>The following outputs are delivered across CBDs:</p> <ul style="list-style-type: none"> additional offerings at cultural institutions special events live music or performance in venues arts, entertainment and recreation installations marketing of above events or offerings. 	<p>The target population:</p> <ul style="list-style-type: none"> are more connected and engaged with supported CBDs visit supported CBDs sooner or more often than they otherwise would have. 	<p>The target population are more comfortable and less hesitant to visit CBDs and visit more frequently</p> <p>The stickiness of short-term pandemic induced behaviour is eroded sooner. This results in: increased foot traffic and spend in CBDs.</p>	<p>The stimulus provided in response to this economic shock supports:</p> <ul style="list-style-type: none"> less economic disruption to businesses in target CBDs faster return to the 'new normal' more jobs retained.

Appendix B – Data summary

Table 10: Summary of data received from grant recipients

Event name	Supported CBD area	Project Reports	Participant Surveys			
			Initial Survey	responses received(n)	Follow-up Survey	responses received(n)
Biennale of Sydney's Art After Dark	Sydney	Yes	Yes	30	Yes	16
Chatswood Nights: Roaming Gnomes	Chatswood	Yes	Yes	338	Yes	28
Liverpool Winter Blast	Liverpool	Yes	Yes	510	Yes	37
Xstatic Wonderland Festival	Sydney	Yes	Excluded	X	Not received	X
Play Manly	Manly	Yes	Yes	407	Yes	46
Eternityland Sydney	Sydney	Yes	Yes	102	Yes	73
Spice Fest	Parramatta	Yes	Yes	225	Yes	36
107 on the Rocks	Sydney	Yes	Yes	82	Yes	8
Park Sounds (Mar-May)	Sydney Olympic Park	Yes	Yes	31	Yes	5
Flow and Glow (May)	Sydney	Yes	Yes	62	Yes	32
Pitt St Mall, ALIVE (April)	Sydney	Yes	Yes	1738	Excluded	X
Into the Woods	Chatswood	Yes	Yes	1106	Yes	89
Autumn Activations	Parramatta	Yes	Yes	69	Not received	X
Laneways Live	Wollongong	Yes	Yes	237	Yes	3
YCK Laneways: Intersections	Sydney	Yes	Yes	20	Yes	19
Our House	Sydney	Yes	Not received	X	Yes	14
Autumn Alive: City Activation Series	Newcastle	Yes	Yes	300	Not received	X
Autumn On Q	Campbelltown	Yes	Yes	82	Yes	15
Press Play	Sydney	Yes	Yes	260	Yes	11
Blacktown by Night	Blacktown	Yes	Yes	370	Yes	22
Hurstville Hop Along	Hurstville	Yes	Yes	1021	Yes	23
MPeXPO at Macquarie Park	Macquarie Park	Yes	Yes	52	Yes	10

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Gather on Kensington	Sydney	Yes	Yes	112	Yes	27
Garden Social, Royal Botanic Garden	Sydney	Yes	Yes	4	Yes	1
Pleasures Playhouse Theatre and Bar	Sydney	Yes	Yes	60	Yes	22
Sydney Waterfront Whale Tales	Sydney	Yes	Yes	237	Yes	164
Southwest Sessions	Liverpool	Yes	Yes	348	Yes	20
Pitt St Mall, ALIVE (Aug-Sept)	Sydney	Yes	Yes	61	Excluded	X
Winter On Q	Campbelltown	Yes	Yes	69	Yes	19
Fleurs de Villes FEMMES	Sydney	Yes	Yes	22	Yes	21
Westfield Parramatta - Your Sports Field	Parramatta	Yes	Yes	1212	Yes	4
The Sydney Shimmer Festival	Sydney	Yes	Yes	80	Yes	56
Barangaroo Food & Wine Festival	Sydney	Yes	Yes	57	Yes	21
Winter at Parramatta	Parramatta	Yes	Yes	144	Yes	298
TEDxSydney in the Square	Sydney	Yes	Yes	78	Yes	15
Bankstown Winter Weekends	Bankstown	Yes	Yes	254	Yes	72
Blacktown Day and Night	Blacktown	Yes	Yes	351	Yes	23
Sydney Festival: In the Wake of Progress	Sydney	Yes	Yes	438	Yes	92
Manly Alive Encore Festival	Manly	Yes	Yes	150	Yes	59
Flow and Glow (Oct)	Sydney	Yes	Yes	33	Yes	31
Winter Warmer Festival	Wollongong	Yes	Yes	183	Yes	37
YCK Laneways: Front & Centre	Sydney	Yes	Yes	120	Yes	72
Powerhouse Late	Sydney	Yes	Yes	35	Yes	3
Gadigal Dreaming - The Sacred Land of the Gadigal People	Sydney	Yes	Yes	29	Yes	26
Westfield Chatswood Food Trail	Chatswood	Yes	Yes	334	Yes	3
Sea-Stainable Hurstville	Hurstville	Yes	Yes	116	Excluded	X
Park Sounds (Aug-Oct)	Sydney Olympic Park	Yes	Yes	155	Yes	19
Eastside Hubs Festival	Sydney	Yes	Yes	47	Yes	39

The Sydney Fringe Sideshow and Runaway Gardens Sydney	Sydney	Yes	Yes	1767	Yes	167
Feast for the Senses	Manly	Yes	Yes	31	Yes	14
Sydney All-Nighter	Sydney	Yes	Yes	27	Yes	16
Art in the Heart of Haymarket	Sydney	Yes	Yes	13	Excluded	X
Luminous	Wollongong	Yes	Yes	180	Yes	65
Surry Thrills Festival	Sydney	Yes	Yes	31	Yes	22
Firefly Barangaroo	Sydney	Yes	Yes	59	Yes	25
ICONIC - A Penrith cultural celebration	Penrith	Yes	Yes	1227	Yes	7
Lights In the Lane + Your House	Sydney	Yes	Yes	19	Yes	11
Fairfield Winter Festival	Fairfield	Yes	Yes	113	Excluded	X
Mac Park Social	Macquarie Park	Yes	Yes	490	Yes	24
Winter Festival Darling Harbour	Sydney	Yes	Yes	143	Yes	3
Forage The Rocks	Sydney	Yes	Yes	45	Yes	3
	Total data sets received	61	60		57	
	Total data sets excluded	0	1		5	
	Total data sets analysed	61	59		52	

Notes:

1. Data received is categorised by:
 - a) [Yes] - data received, and analysed
 - b) [Not received] - data not received
 - c) [Excluded] data received but excluded from the analysis.
2. While project reports were received from all completed projects, a selection was excluded from the analysis if requested indicators were incorrectly filled or incomplete. See section 2.3.1.

Appendix C – UTS IPGG Population Survey report

Appendix D – Participant survey – initial and follow-up

Table 11: Initial participant survey – questions

	Question	Response type
1a	Prior to attending [event] which statement best reflects your connectedness and engagement with [location] central business district.	Very connected and engaged - Somewhat connected and engaged - Somewhat disconnected and disengaged - - very disconnected and disengaged - Don't know / not applicable
1b	After attending [event] would you say your degree of connectedness and engagement with [location] central business district has changed?	Yes - No
1c	[If Yes] Please provide some reasons to explain your above answer	Open text response
2a	What would best describe the primary purpose of your visit to [location] central business district today?	Business - Visit friends and relatives - Holiday - Recreation - Other, please specify
2b	Was the [event] a key factor in your decision to attend [location] central business district today?	Yes - No
2c	How many hours did you spend in the [location] central business district on the day of attending [event]	To the nearest half an hour capped at 10+ hours
3a	In the week prior to today how many days did you spend some amount of time in [location] central business district?	Sliding scale of 0 to 7 days
4	[Conditional question] On average how much did you spend per day, last week while in [location] central business district?	\$0 to \$25 - \$26 to \$100 - \$100 to \$250 - \$250+

Table 12: Follow-up participant survey – questions

	Question	Response type
3a	In the week prior to today how many days did you spend some amount of time in [location] central business district?	Sliding scale of 0 to 7 days
3b	What would best describe the primary purpose of your visit to [location] central business district in the last week?	Business - Visit friends and relatives - Holiday - Recreation - Other, please specify
3c	Which statement best reflects the influence that events and things to do in the [location] central business district had on your decision to spend time there in the last week?	A significant amount - A moderate amount - Very little- None - Don't know / not applicable
3d	After attending [event] would you say you have been more inclined to visit [location] central business district	Yes - No
3e	[If Yes] Please provide some reasons to explain your above answer	Open text response
4	On average how much did you spend per day, last week while in [location] central business district?	\$0 to \$25 - \$26 to \$100 - \$100 to \$250 - \$250+

Appendix E – Case studies

Case studies were developed as part of the Office of the 24-Hour Economy Commissioner Year in Review 2023 and included data collected as part of the outcome evaluation and supplementary data provided by grant recipients.

CASE STUDY

Pleasures Playhouse Theatre and Bar (part of Round 3 of the Program)

This six-week music and arts festival staged by HG Events transformed a disused Haymarket cinema into a vibrant entertainment hub. Opening up the abandoned Harbour City Cinema and Dixon Mall for the first time in 15 years, a diverse entertainment program, paired with a hospitality offering featuring some of Chinatown’s best eats, drew an estimated 15,000 participants over the festival’s 35-days of events.

The CBDs Revitalisation project funding assisted HG Events in securing an extended commercial lease beyond the project for November 2022 -March 2023, allowing Harbour City Cinema to remain open for communities and artists’ continued use, adding a valuable multi- disciplinary art and live music venue to Sydney’s arts and culture infrastructure.

“Now I go back to the CBD and Haymarket a lot more.”



(L to R) Michael Rodrigues, Kat Dopper, Jess Scully



Pleasures Playhouse

The diverse program included 10 different styles of events engaging with 20 Sydney communities and subcultures, including an underground sexuality and body positivity party courtesy of Leak Your Own’s Show us Ya Tips, live music performances by the likes of Alex Lahey and Nai Palm, and a cabaret revue with an accompanying live house band. The hospitality offering included pop-up Yum Cha, natural wines from P&V Merchants and noodles from Biang.

Of attendees surveyed, 97% said that Pleasures Playhouse was a key factor in their decision to visit the Sydney CBD on the day they attended. Anecdotal evidence also supports the success of the event in drawing a wider public to Chinatown:

“Although I work in the CBD, I hadn’t spent much time around the northern end of Chinatown for quite some time. However, on the back of attending events at Pleasures Playhouse, I’ve since dined at a number of bars and restaurants in the precinct that I hadn’t previously visited.”

“I was exposed to parts of the city I hadn’t been before. Now I go back to the CBD and Haymarket a lot more.”

* Figures based on funding recipient reports and participant surveys

CASE STUDY

Blacktown by Night (part of Round 2 of the Program)

This multi-month series of curated arts, entertainment and cultural events featuring live music performances, film screenings and creative workshops took place between 8 April and 25 June 2022 at the Leo Kelly Blacktown Arts Centre alongside multiple activations throughout the Blacktown



Blacktown by Night

CBD. It was staged by Blacktown Arts, Blacktown City Council to attract newcomers to the area and stimulate the local economy. The inclusive program was devised to engage with a broad inter-generational and inter-faith audience, with a focus on family-friendly and alcohol-free events. Blacktown Arts also delivered a range of additional programming during Blacktown by Night, including extended hours for public programs, special screenings and exhibitions, new music performances, and block party-style outdoor takeovers.

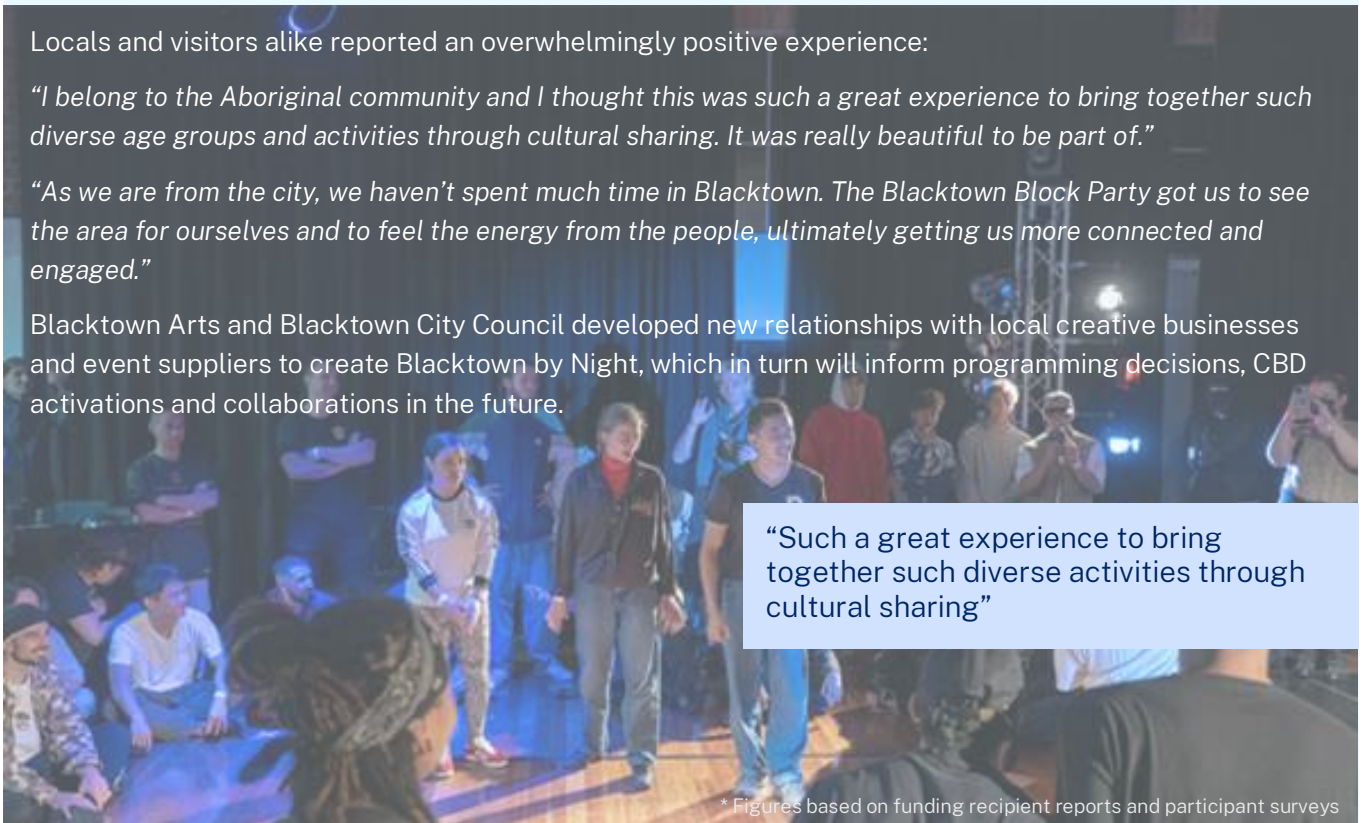
During the over 80 days of free and ticketed events, over 6000 participants are estimated to have spent an average of 3.9 hours in the Blacktown CBD.* 88% of surveyed participants said the Blacktown by Night event was a key factor in their decision to visit the Blacktown CBD. The Council/Blacktown Arts also estimates over 300 businesses were supported within the CBD area, including dining and retail venues. Close consultation with First Nations Elders and local custodians was vital to creating an inclusive and welcoming atmosphere at Blacktown by Night events, and 65% of respondents surveyed said their degree of connectedness and engagement with the Blacktown CBD changed after attending a Blacktown by Night event.*

Locals and visitors alike reported an overwhelmingly positive experience:

“I belong to the Aboriginal community and I thought this was such a great experience to bring together such diverse age groups and activities through cultural sharing. It was really beautiful to be part of.”

“As we are from the city, we haven’t spent much time in Blacktown. The Blacktown Block Party got us to see the area for ourselves and to feel the energy from the people, ultimately getting us more connected and engaged.”

Blacktown Arts and Blacktown City Council developed new relationships with local creative businesses and event suppliers to create Blacktown by Night, which in turn will inform programming decisions, CBD activations and collaborations in the future.



“Such a great experience to bring together such diverse activities through cultural sharing”

* Figures based on funding recipient reports and participant surveys

CASE STUDY

Flow and Glow
(part of Round 2 of the Program)

With the aim of expanding Sydneysiders’ familiarity of the Wynyard area of the Sydney CBD, while connecting small, pandemic- impacted businesses with new consumers, leading commercial real estate services and investment company CBRE collaborated with industry bodies, local landlords and arts,

hospitality and local businesses to stage two days of educational seminars, market pop-ups and inclusive arts installations on 26,27 May 2022. Vacant retail spaces in Carrington Street, George Place and Charter Hall, as well as overlooked outdoor locations like Wynyard Lane, were transformed for the free events which attracted approximately 34,000 participants.*

Flow and Glow reported creating 167 employment opportunities during its development and delivery, including 144 engaged suppliers managing operations and content, and 23 CBRE staff contributing to design, logistics and stakeholder engagement. A broad range of presenting partners came together to realise Flow and Glow, including TEDx Sydney, EG Funds, ISPT (George Place) Charter Hall (1 Martin Place), Brookfield, Marprop, City of Sydney, The Station Ltd and PCA.

Attendees confirmed that the two day event met its objectives, with 74% of surveyed respondents agreeing that Flow and Grow had changed their connection and engagement with the Sydney CBD, while 65% of respondents said they spent five or more hours in the CBD on the day they attended the event.

“Underpinned by ESG [economic, social and governance], CBRE explored innovative space utilisation, brought life into sleeping spaces and led bold conversations to inspire action. We are proud of our meaningful contribution to a thriving community where we live, work and play.” Ash Nicholson, Director of Partnerships, CBRE



Flow and Glow seminar



Flow and Glow at Australia Square

* Figures based on funding recipient reports and participant surveys

CASE STUDY

Parramatta – Your Sports Field (part of Round 3 of the Program)

Over two weeks in September 2022, Westfield Parramatta brought the city’s love of sports to life via six giant sport artwork installations displayed throughout the CBD. These public artworks were accompanied by a series of activations in the broader precinct including pop-up sporting zones, sports events screenings, talent appearances, skill workshops, and roving entertainment.



An estimated 61,300 people participated in over 80 activations

Westfield Parramatta estimated that 61,300 people participated in over 80 activations during the two weeks of the event from 16-30 September.* With over 400 businesses supported, a vast collective of partners from state and local government, community organisations and retailers collaborated to realise Your Sports Field, including City of Parramatta, Transport for NSW, Comm Bank Stadium, the Food Truck Association Australia and venues on Parramatta’s Eat Street.* Consultation with local schools, universities and sporting clubs was vital to the design process of the sports installations.

Westfield Parramatta reported a high engagement of families during the event, thanks to programming that promoted community health and wellbeing in a fun and inclusive way through active workshops, classes and games. 57% of surveyed attendees said their connection to the Parramatta CBD had been changed as a result of attending Parramatta –Your Sports Field, while 27% of those surveyed said that attending the event was the key factor in their decision to visit the Parramatta CBD. Westfield Parramatta reported that visitors spent an average of three hours in the CBD.

“Westfield Parramatta is a community destination at the heart of Western Sydney. Our participation in the CBD Revitalisation Program saw more people return to our centre and broader precinct to socialise with friends and family whilst enjoying the fantastic Your Sports Field experience.”
Jacqui Waine, Scentre Group General Manager Marketing and Community

* Figures based on funding recipient reports and participant surveys

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