

# ImagineSydney

Play | 2019

Methodology



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*Shaping  
Future Cities*

# Valuing arts and culture survey

## 1.1.1 Methodology

The value that Sydney residents attach to the arts and culture was determined through a survey of 1009 participants. The sample population was made up of an approximately equal number of men and women, from a wide range of age groups. Additionally, an equal proportion of participants were taken from each of the three city districts. This suggests that the sample population is representative of the wider city population, and the survey results can be generalised to the whole of Sydney.

The survey asked participants how often, over the last 12 months, they had visited at an event or institution of a specific type. The classifications included:

- *Art galleries or museums* – this includes places that exhibit paintings, sculptures, or cultural and historical artefacts.
- *Visual art events or festivals* – this includes events where multiple different styles and types of art are exhibited or promoted together.
- *Live theatre or dance shows* – this covers musicals, stage plays, the ballet, circus acts and other live shows that incorporate actors and performers.
- *Symphony or opera*.
- *Live music concert* – this covers concerts with small audiences to large international acts that perform within stadiums.

- *Music festival* – these events are typically larger than live music concerts and incorporate performances by multiple musicians or producers. This category also includes festivals that last multiple days.
- *Film festival* – these events can extend over multiple days, even weeks, and incorporate the screening of local and international films developed by production companies of various sizes.
- *Cinema* – this includes theatres of all sizes where the public can view films. It also includes temporary or outdoor theatres.
- *Literary event or festival* – this incorporates events where the works or authors and writers are exhibited or promoted.
- *Local suburban or cultural festival* – these are festivals or events that showcase the art or culture of a local community.
- *Other festival* – this covers any event that does not fit into the definition of any other classifications.

Based on their last visit to an event or institution, participants were asked to indicate their level of expenditure and length of time spent. Participants were also asked how they would behave under a number of hypothetical scenarios.

Using these survey responses, the value of cultural infrastructure to individuals was estimated through two different methods, both of which are based on different sets of assumptions.

The travel and time use method posits that if visitors<sup>1</sup> weren't attending an arts event or institution, they would engage in alternative leisure activities. The time or activities forgone (referred to as the 'opportunity cost' of visitation) is assumed to be equal to the visitor's value of the event or institution.

The willingness-to-pay method looks at the amount that visitors would pay over what they currently spend on tickets and other merchandise. It is assumed that this amount (referred to as 'consumer surplus') reflects the value of benefits received from visitation.

The survey also asked participants to indicate how they might define the arts and culture. This was based on a number of existing classifications of the arts and culture:

*Fine arts and culture* – this refers to art that is developed by professionals for aesthetic value, such as paintings, sculpture, poetry, literature and theatre.

*Individual arts and culture* – this refers to art that anyone can engage in to express themselves, such as choirs, art classes, or dance workshops.

*Community arts and cultural development* – this is where professionals and individuals work collaboratively to reveal their artistic and cultural expression. This includes festivals, public art, and digital experiences.

Finally, participants were also asked to indicate their level of interest in the arts and culture, and outline some of the reasons why they choose to go (or not go) to events and institutions.

# Night time economy: Assumptions and methodology

This section presents the methodology (variables, data sources and formulae) and the assumptions used for estimating the value of the NTE in Greater Sydney. The aim of this calculation is to estimate the value of the current NTE in Greater Sydney and to estimate the value of the 'potential' NTE in the same region for the same time period.

## A.1 Assumptions

The estimation is based on ABS industry data.<sup>2</sup> Greater Sydney includes the following Local Government Areas (LGAs):

**Table A.1 Local Government Areas included in Greater Sydney**

<b>Eastern Harbour City</b>	<b>Central River City</b>	<b>Western Parklands City</b>
Ashfield	Blacktown	Blue Mountains
Bayside	Cumberland	Camden
Burwood	Parramatta	Campbelltown
Canada Bay	The Hills	Fairfield
Canterbury-Bankstown		Hawkesbury
Gosford		Liverpool
Georges River		Penrith
Hornsby		Wollondilly
Hunters Hill		
Inner West		
Strathfield		
Ku-ring-gai		
Lane Cove		
Mosman		
North Sydney		
Northern Beaches		
Randwick		
Ryde		
Strathfield		
Sutherland		
Sydney		
Waverley		
Willoughby		
Woollahra		

Source: Deloitte Access Economics analysis, 2018.

The NTE in Greater Sydney incorporates the following list of activities that are considered NTE activities in Australia for the purpose of analysis in this report.<sup>3</sup> ANZSIC NTE categories for the NTE comes from three distinctive area: drink, food, and entertainment show in Table A.2 (right).

**Table A.2 Sectors considered as part of the NTE**

<b>NTE sector</b>	<b>ANZSIC number</b>	<b>NTE activity description</b>
Food	4511	Cafes and restaurants
	4512	Takeaway food services
Drink	4123	Liquor retailing
	4520	Pubs, taverns and bars
Entertainment	4530	Clubs (hospitality)
	900	Performing arts operation
	900	Artists, musicians, writers, performers
	900	Performing arts venue operation
	911	Health and fitness centres, gymnasias
	911	Sports and physical recreation clubs
	911	Sports and physical recreation venues
	911	Sports and physical recreation services
	912	Horse and dog racing operations
	912	Other horse and dog racing activities
	913	Amusement parks and centres operations
	913	Recreational activities
	920	Casino operation
920	Lottery operation	
920	Other gambling activities	
	9534	Brothel keeping and prostitution

Source: Deloitte Access Economics analysis, 2018.

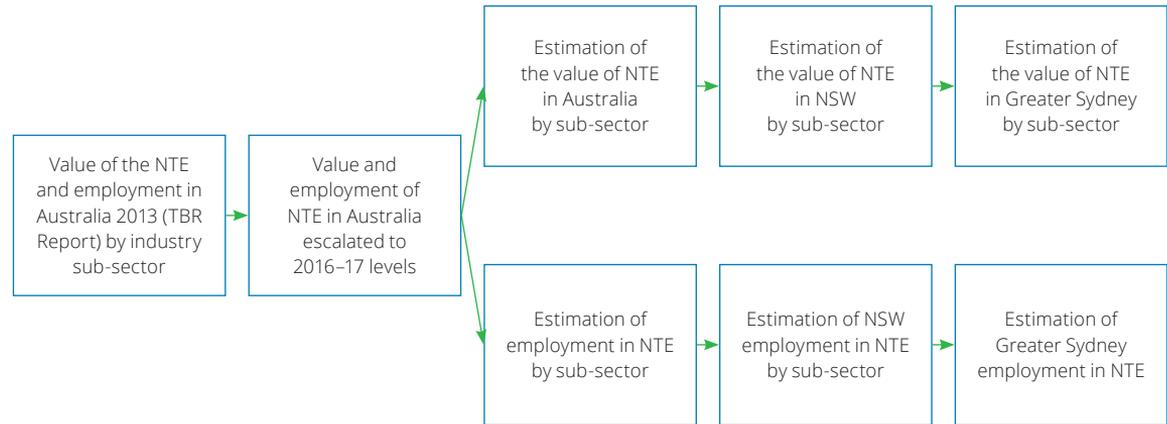
### A.2 Methodology for the estimation of the value of the NTE in Greater Sydney

To value the NTE in Greater Sydney in 2016–17, the methodology utilised in the TBR<sup>4</sup> was re-used, escalating the Australian figures into today's dollars and then pro-rated to calculate Greater Sydney's share of the Australian NTE. The process is outlined in Figure A.1.

To estimate the NTE in Greater Sydney the following was undertaken:

- 1.** Using the value and employment of the NTE in Australia in 2013 by sub-sector, the value and employment of NTE in Australia was escalated to 2016–17 levels.
- 2.** It was assumed the NTE's share within each industry sub-sector did not change from 2013.
- 3.** In order to assess the NSW share of the NTE, IBIS World data was used to obtain each industry sub-sector share of Australia for both employment and GSP.
- 4.** The NSW share is then converted into the Greater Sydney share for both employment and GSP using Deloitte Access Economics analysis, 2018.

**Table A.1 Estimation of the current NTE in Greater Sydney for the year 2016–17**



Source: Deloitte Access Economics analysis, 2018.

# Sports and recreation survey

## 1.2 Definitions/about this study

The focus of this study is on involvement in sport and physical recreation, but not broader activity. The definitions used in the survey and report align with the definition in the Australian Sports Commission's Act (1989).

This research is based on a survey of over 1,000 Sydneysiders, across the Western Parklands region, Central River region and Eastern Harbour city. The survey was fielded in September 2018 by Research Now Pty Ltd.

	Definition	Examples
<b>Sport</b>	Includes both organised and non-organised sport, incorporating competition, organisations and/or rules.	<ul style="list-style-type: none"> <li>• Club netball</li> <li>• Social touch football</li> <li>• Backyard cricket</li> </ul>
<b>Physical recreation</b>	Conscious pursuit of activity without rules, organisations or competition, but pursued to achieve a health outcome	<ul style="list-style-type: none"> <li>• Running</li> <li>• Swimming</li> <li>• Going to the gym</li> <li>• Dancing</li> </ul>
<b>Broader activity</b>	Completing physical activity as a consequence of wider motivations	<ul style="list-style-type: none"> <li>• Cycle commuting</li> <li>• Fishing</li> <li>• Physical labour</li> <li>• Gardening</li> </ul>

# Endnotes

1. A visitor, for the purposes of this analysis, is defined as someone that has visited at least one arts and culture event or institution within the last 12 months.
2. 81550DO002\_201617 Australian Industry, 2016–17. 2016–17 Australian data by industry – Table 1 – Key data by industry subdivision, released at 11.30am Friday 25th May 2018.
3. Please see page 68 in Appendix C from the report: 'The Australian Night Time Economy and the NTE Economic Performance of KEY LGAs 2009 to 2013'; tbr, February 2015.
4. TBR, February 2015, 'The Australian Night Time Economy and the NTE Economic Performance of KEY LGAs 2009 to 2013'.

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