

ATTACHMENT B

**DRAFT GEORGE STREET 2014
BENCHMARKING STUDY**

GEORGE STREET, SYDNEY

BENCHMARKING STUDY

DATA COLLECTION 2014



DRAFT 18.11.2014



Sydney City Council
Town Hall House
456 Kent Street
Sydney
NSW 2000 Australia



www.gehlarchitects.com

CONTENTS

PAGE 05. INTRODUCTION

PAGE 08. KEY PERFORMANCE INDICATORS

PAGE 10. BEST PRACTICE

PAGE 14. DATA COLLECTION

PAGE 14 _ IDENTITY

01. LINKAGE POTENTIAL
02. VISITOR DESTINATIONS
03. PERCEPTIONS OF GEORGE STREET
04. IMAGES OF GEORGE STREET
05. 3 DIFFERENT CHARACTERS
06. GROUND FLOOR ACTIVITY
07. HERITAGE BUILDINGS
08. BUILDING HEIGHTS
09. STREET TREES
10. PAVING
11. PUBLIC ART

PAGE 28 _ MOBILITY

01. PUBLIC TRANSPORT NETWORK
02. MODAL COUNT
03. PEDESTRIAN NETWORK
04. GS PEDESTRIAN VOLUME PATTERNS
05. CROSS STREETS PED VOLUME PATTERNS
06. SPACE ALLOCATION
07. A CROWDED STREET
08. WAITING TIME AT CROSSINGS

09. PEDESTRIAN INJURIES
10. AWNINGS
11. DRIVEWAY COUNTS

PAGE 44 _ PUBLIC LIFE

01. 12 QUALITY CRITERIA
02. STATIONARY ACTIVITY ALONG GEORGE STREET
03. STATIONARY ACTIVITY IN SPACES ALONG GS
04. PUBLIC AMENITIES AND BENCHES
05. COMMERCIAL OUTDOOR SEATING
06. NOISE LEVELS
07. AIR QUALITY
08. AGE AND GENDER
09. NIGHTLIFE

PAGE 58 _ ECONOMICS

01. BUSINESSES ALONG GEORGE STREET
02. FOOD BUSINESS
03. RETAIL BUSINESS
04. COMMERCIAL RENTS
05. RESIDENTIAL DEVELOPMENT
06. EMPLOYMENT

HOW TO USE THIS DOCUMENT

This document is part of a suite of documents as displayed below.

PUBLIC SPACES PUBLIC LIFE 2007

The Public Spaces and Public Life study developed by Gehl Architects in 2007 identified George Street as the main spine in Sydney. George Street was pointed out as the main street connecting three main squares - Railway Square, Town Hall Square and Circular Quay.

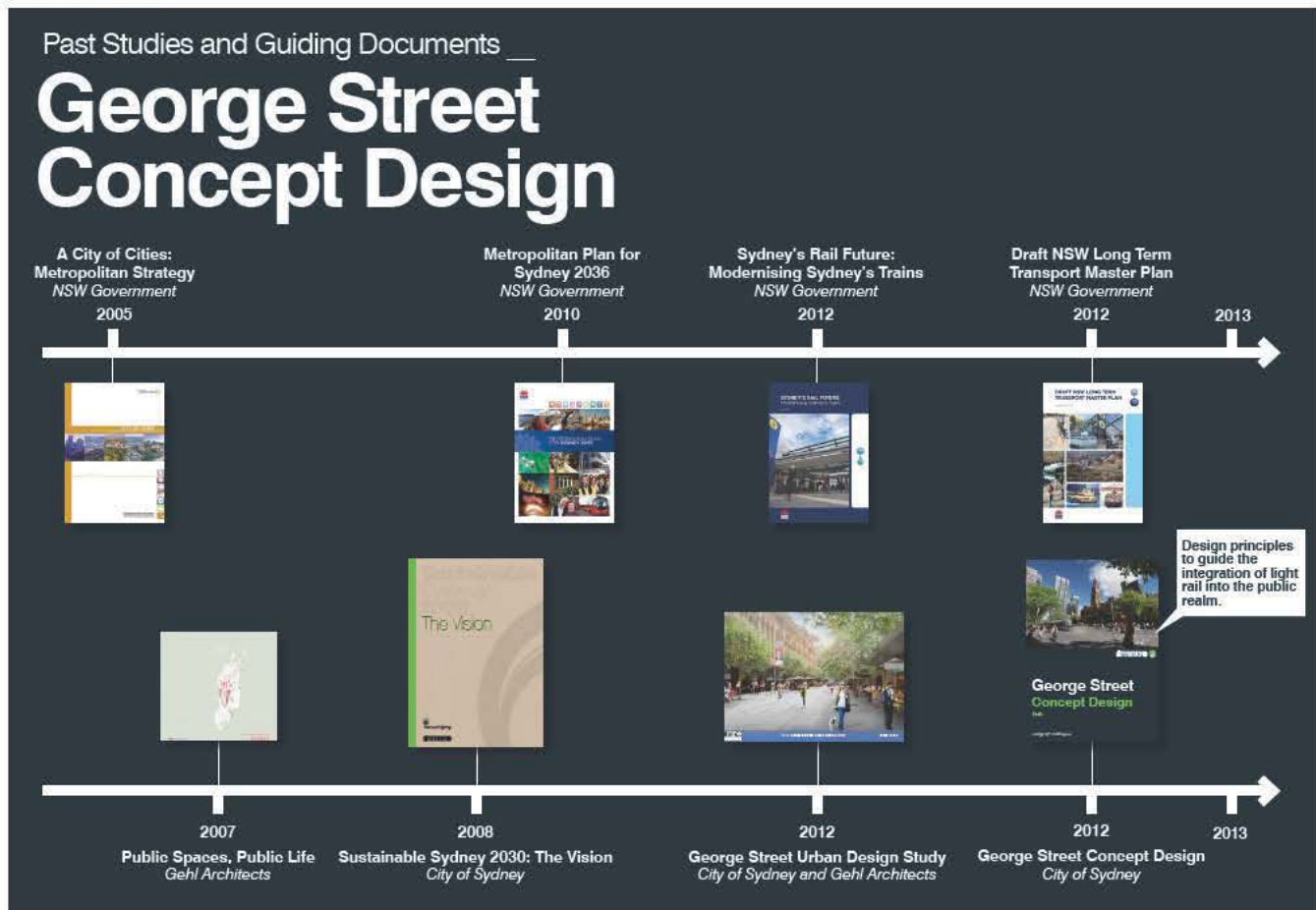
Subsequently to the Public Space and Public Life study a light rail feasibility study was carried out by Transport NSW, which also pointed towards George Street as the key spine.

GEORGE STREET CONCEPT DESIGN

The George Street Concept Design was developed by City of Sydney and identified a number of elements to be considered when developing a design scheme for George Street that would include future light rail. The concept design identifies a number of parameters to be considered and also points out the aspirations for a transformed George Street.

This report seeks to provide a benchmark on the current state of George Street to enable future comparisons and measurements for success or failure.

Whilst providing a benchmark for George Street it is broadly considered that the transformation of George Street will have an intrinsic effect on adjoining streets and spaces and that the entire CBD will benefit in positive terms.



INTRODUCTION

George Street is in a process of great change. With a new lightrail, George Street will be a strong corridor for sustainable transport. The transformation of George Street, however, is much more than just a transport project; it is the making of a great street, which will help transform the city of Sydney. The present document is a tool for measuring and steering this transformation process.

PORTRAIT OF A STREET AS A PUBLIC SPACE

What is George Street today? What does it look like? How is it used? These and many other questions will be addressed in this report, and the aim is to paint a comprehensive and integrated picture of George Street. By compiling a wide range of data such as mobility patterns, retail structure, air quality, street furniture and many others the document demonstrates that the transformation is about more than just design – it's about the effect that the change has on the quality of life on George Street and the wider city. With the comprehensive set of data the document draws a number of conclusions on the overall conditions for 'Identity', 'Mobility', 'Public Life' and 'Economics'.

THE ROLE OF DATA IN A PROCESS OF CHANGE

Processes of change are often characterised by uncertainties – is this the right path of development? How can we be sure that the plan will be a success? To collect comparative data over time is a way to infuse the development process with more certainty rather than just belief, and this is valuable – not only for the planners involved, but also for the politicians in their communication with the broader public. The present document describes the current situation of George Street and highlights how the change process can be measured. It proposes a number of key performance indicators related to the goals and strategies for the transformation of George Street. As such it becomes an important tool for measuring success and building public support.

The intention is that the various types of data presented in this report will be collected comparatively over time. This allows for a continuous monitoring of the process of change, and if needed it allows to test and refine strategies and concrete initiatives along the way, and these learnings can also inform the design of other future projects. The transformation of Swanston St. in Melbourne is an example of this, where continuous monitoring resulted in re-adjustments of strategies and design solutions.

A BENCHMARK TOOL

In addition to helping steer the transformation process, the comprehensive collection of data will also serve as a possible benchmark tool. How is George Street performing in relation to comparable great streets around the world? What is the result and experience of implementing strategies similar to those in other cities?

The transformation of George Street is more than a transport project; it is a leveraging of the unique qualities of George Street and the potential it holds as a spine and a great street in the city centre. The coming investments will greatly benefit George Street but also its immediate surroundings and the city centre as a whole. These targeted transformations will serve as a catalyst of change towards a healthier urban environment in central Sydney. This report presents the data that illustrates these benefits.

TRANSFORMING GEORGE STREET

DESIGN PRINCIPLES

Seven design principles have guided the development of City of Sydney's Concept Design for George Street's transformation.

The overall targets of the design principles are to deliver a strengthened identity, an improved mobility, an invigorated public life, and a more resilient economy. Through achieving these four overarching goals George Street will experience an improved business economy that will benefit the entire city centre as more visitors are attracted and people are invited to stay longer.

The links between the overall targets and the design principles are shown on this page.

KEY PERFORMANCE INDICATORS

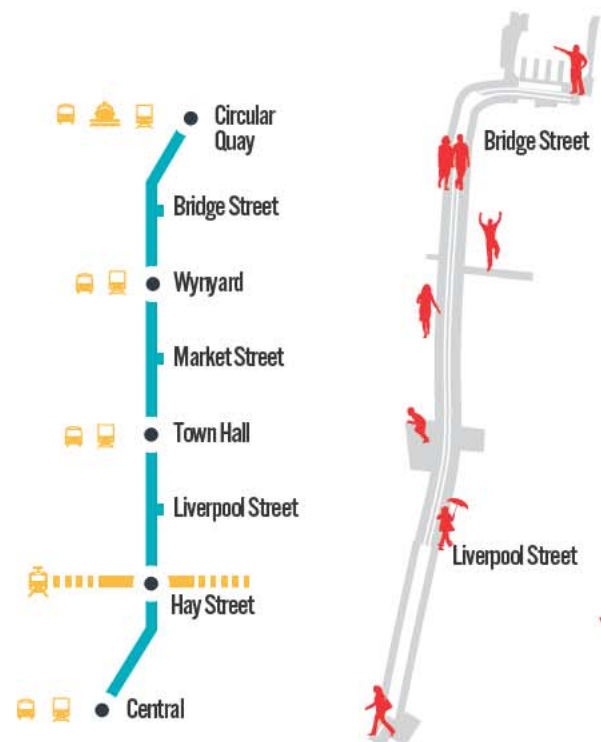
The following pages describes central key performance indicators which can be used for measuring the transformation process of George Street. They have been selected based on their ability to deliver the above targets and principles. Based on these indicators four success criteria are suggested. In the coming years other indicators and success criteria could be added to the list.

The data collected for this report have been organized in four chapters, Identity, Mobility, Public Life and Economics. The first three chapters focus on conditions and impacts on George Street, whereas the Economics chapter also considers the transformation of George Street in relation to the whole of Sydney's central business district.

IDENTITY

AN EFFICIENT
TRANSPORT
SPINE

A PEDESTRIAN
FOCUSED
BOULEVARD



MOBILITY

PUBLIC LIFE

ECONOMICS

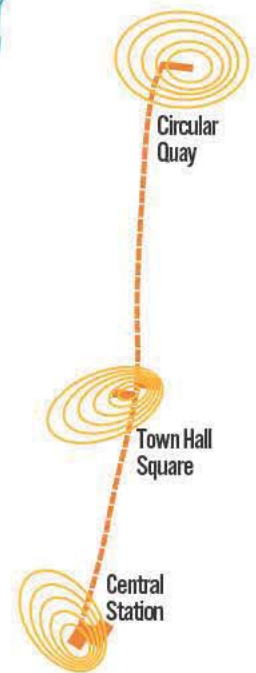
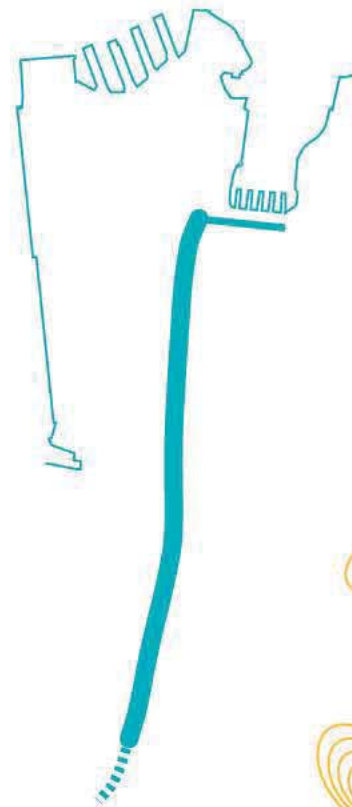
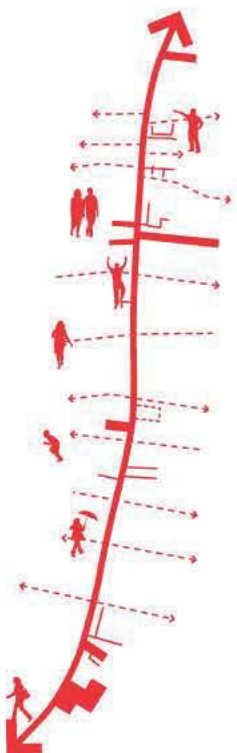
A LEGIBLE SPINE

AN ICONIC STREET

A 24-HOUR STREET

LINKING THE CITY TO THE HARBOUR

CONNECTING THREE GREAT SQUARES



KEY PERFORMANCE INDICATORS

IDENTITY

- INCREASED POSITIVE PERCEPTIONS OF GEORGE STREET
- INCREASED AMOUNT OF ACTIVE FRONTAGES
- MORE AVAILABE PEDESTRIAN SPACE
- MORE TREES / BETTER CANOPY COVER ALONG GEORGE STREET

"IN 10 YEARS GEORGE STREET WILL BE PERCEIVED AS A DESTINATION IN SYDNEY"

MOBILITY

- INCREASED PERCENTAGE OF PEDESTRIAN TRAFFIC
- INCREASE IN EVENING PEDESTRIAN TRAFFIC
- DECREASE IN PEDESTRIAN INJURIES
- REDUCED TRAVEL TIME ALONG GEORGE STREET

"IN 10 YEARS PEDESTRIANS AND PUBLIC TRANSPORT USERS WILL BE ABLE TO MOVE MORE EFFICIENTLY THROUGH GEORGE STREET"

KEY PERFORMANCE INDICATORS

PUBLIC LIFE

- MORE STAYING ACTIVITY ALONG GEORGE STREET
- MORE NIGHT LIFE ACTIVITY ALL ALONG GEORGE STREET
- MORE OUTDOOR CAFÉ SEATING
- REDUCED NOISE LEVELS & IMPROVED AIR QUALITY

**"IN 10 YEARS LINGERING ACTIVITY ALONG GEORGE STREET
WILL INCREASE BY MORE THAN 100%"**

ECONOMICS

- INCREASED DIVERSITY OF USES IN BUILDINGS ALONG GEORGE STREET
- INCREASED NUMBER OF RESIDENTS IN THE CBD
- MORE CUSTOMERS ON GEORGE STREET
- DECREASE IN OFFICE VACANCY

**"IN 10 YEARS GEORGE STREET WILL BE A THRIVING RETAIL
LOCATION"**

BEST PRACTICE: BROADWAY, NEW YORK

BROADWAY REVITALISATION

Broadway was closed to through traffic in 2008 and bicycle lanes and public space improvements were introduced along the length of the entire corridor. The changes were implemented as pilot projects in order to test the new road configuration before the final design was implemented. The changes to Broadway have been a big success and have been received positively by residents, transport users and businesses along the corridor.

KEY STRATEGIES

- Improving vehicular traffic flows, maximizing vehicular access in Midtown and creating safer intersections by limiting through traffic along the street
- Reclaiming space for people and creating new public space nodes of various character in addition to improving the pedestrian experience
- Using pilot projects and temporary events to test public space nodes of various character throughout the street





RECLAIMED PUBLIC SPACE

- **35,800 m² of new public space**, nearly 3 times as much space as Federation Square in Melbourne
- **Times Square: 10,000 m²** of reclaimed space – 5 times more space for people
- **Herald Square: 7,400 m²** of reclaimed space – twice the space for public life
- **Worth Square: 9,300 m²** of reclaimed space – 8 times more space for people

INCREASE IN PUBLIC LIFE

- **80%** fewer pedestrians walking in the roadway
- **11%** increase in pedestrian traffic throughout the area 2008-2012



STATIONARY ACTIVITY

- **74%** say Times Square has improved dramatically
- **84%** increase in stationary activities
- **42%** of locals now shop more often
- **26%** more leave offices for breaks throughout the area 2008-2012

BEST PRACTICE: SWANSTON STREET, MELBOURNE

KEY STRATEGIES

- Pedestrian, bicycle, and light rail priority.
Limited vehicular access
- More space for walking & staying
- Excellent light rail stops
- A string of public spaces of diverse uses
- A consistent approach

STATE LIBRARY FORECOURT

Bourke Street Mall

'Pocket Corner'

City Square

FEDERATION SQUARE

5 min.
400 m

A PROCESS OF REFINING

Swanston Street is the main civic spine of Melbourne. In 1991 the City of Melbourne made a landmark decision to close Swanston Street to vehicle traffic and in 1992 Swanston Street was closed to through traffic. Pedestrian and bicycle space was upgraded with widening footpaths, provision of bicycle lanes, new street furniture, clearer signage, tree planting and installation of artworks.

Despite these efforts and successful during the day, the street was largely empty during the evening. In response, the decision was made in 1999 to open the street to vehicles between 7 pm and 7 am. More recent upgrades including increased retail, restaurants and residential uses have increased nighttime activity.

In 2012 Swanston Street went through another upgrade featuring four light rail zones with no vehicular access and improved conditions for transit users as well as an elevated path for bicycles.

RECLAIMED PUBLIC SPACE

- **29,900 m²** of new public space from 1994-2004
- **71%** more space for people and activities on streets, squares, malls and promenades



INCREASE IN PUBLIC LIFE

- **40%** increase of daytime pedestrian traffic
- **100%** increase of nighttime pedestrian traffic
- **300%** increase of stationary activity
- **62%** more students in the central city throughout the area 1993-2004

IMPROVED ECONOMY

- **275%** more cafes & restaurants
- **177%** more cafe seats
- **60%** increase in bar and pub capacity
- **44%** increase in CBD employment
- **62%** decrease in office vacancies throughout the area 1993-2004



IDENTITY

KEY PERFORMANCE INDICATORS

- INCREASED POSITIVE PERCEPTIONS OF GEORGE STREET
- INCREASED AMOUNT OF ACTIVE FRONTAGES
- MORE AVAILABE PEDESTRIAN SPACE
- MORE TREES / BETTER CANOPY COVER ALONG GEORGE STREET

IN 10 YEARS GEORGE STREET WILL BE
PERCEIVED AS A DESTINATION IN SYDNEY



THIS IS
OUR CITY
IN SUMMER

IN SUMMER
OUR CITY
THIS IS

THIS IS
OUR CITY
IN SUMMER

THIS IS
OUR CITY
IN SUMMER

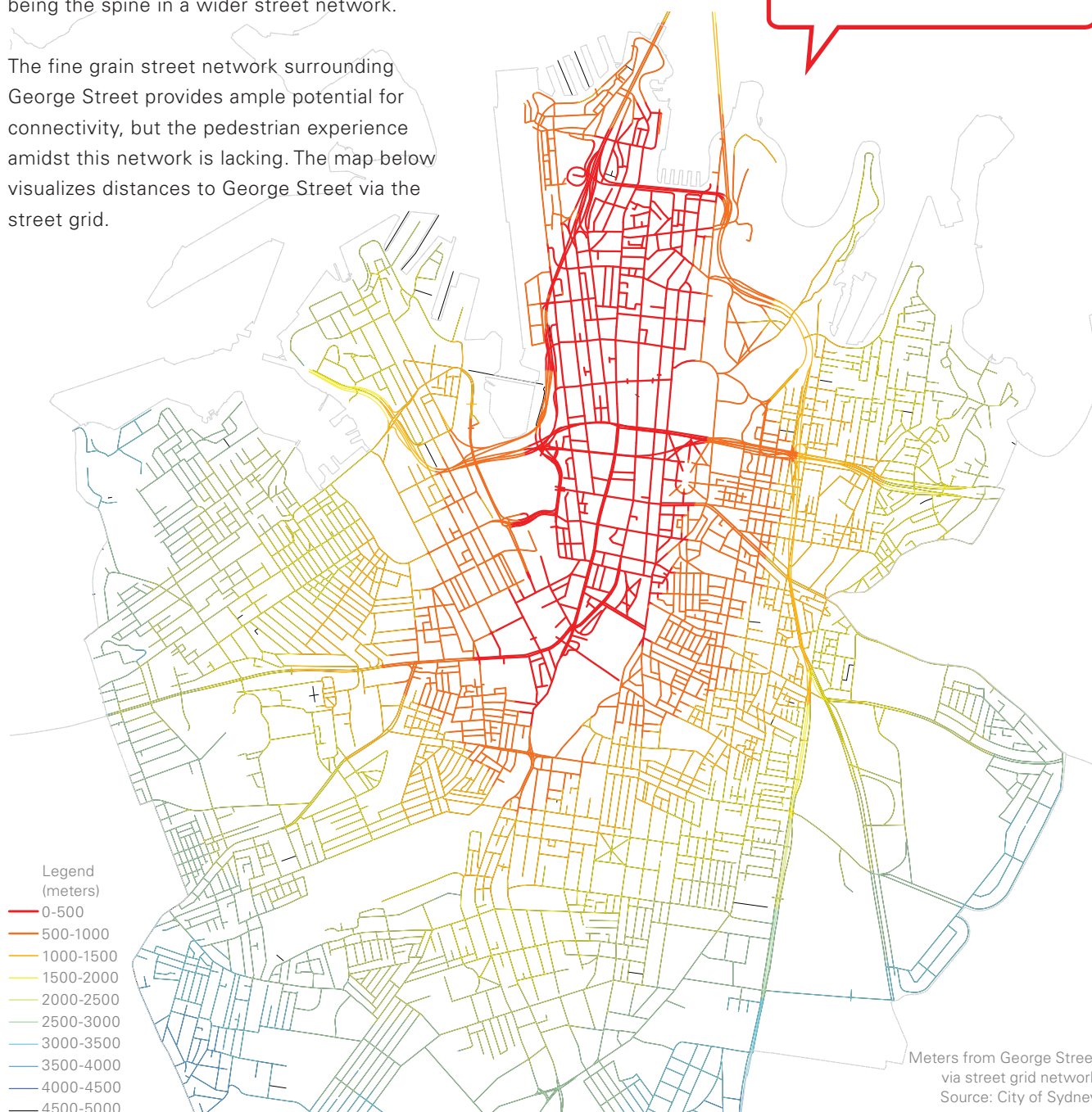
THIS IS
OUR CITY
IN SUMMER

01 / LINKAGE POTENTIAL

George Street was originally known as High Street in Sydney due to the concentration of commercial activities along it but also due to its key role as a connector street for a number of important locations in Sydney as well as being the spine in a wider street network.

The fine grain street network surrounding George Street provides ample potential for connectivity, but the pedestrian experience amidst this network is lacking. The map below visualizes distances to George Street via the street grid.

**GEORGE STREET LINKS UP:
35 SIDE STREETS AND
8 SQUARES**



Meters from George Street
via street grid network
Source: City of Sydney

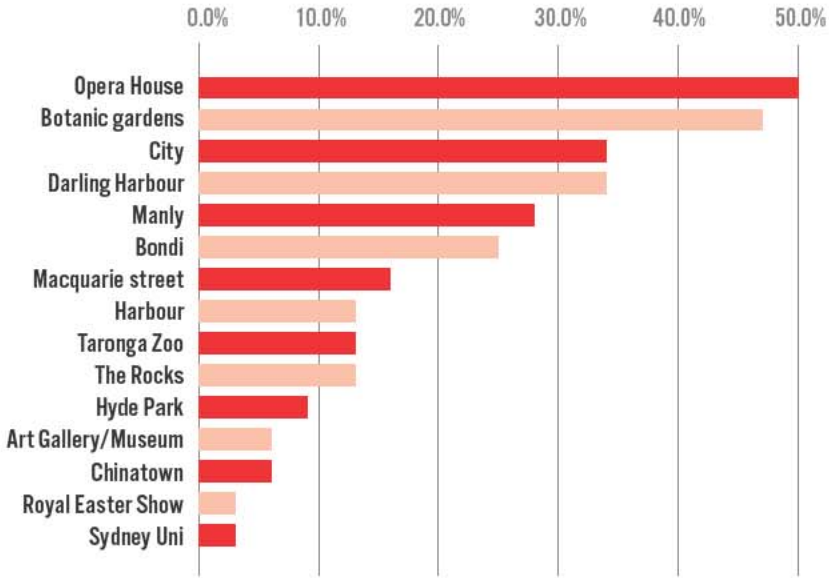
02 / VISITOR DESTINATIONS



GEORGE STREET IS THE MAIN ROUTE USED TO ACCESS THE KEY TOURIST AREAS OF SYDNEY CBD....

Source: Visitor Wayfinding in Sydney, August 2011
Destination NSW, University of Technology Sydney

PLACES VISITED BY TOURISTS



...BUT IS NOT PERCEIVED AS A DESTINATION IN ITSELF

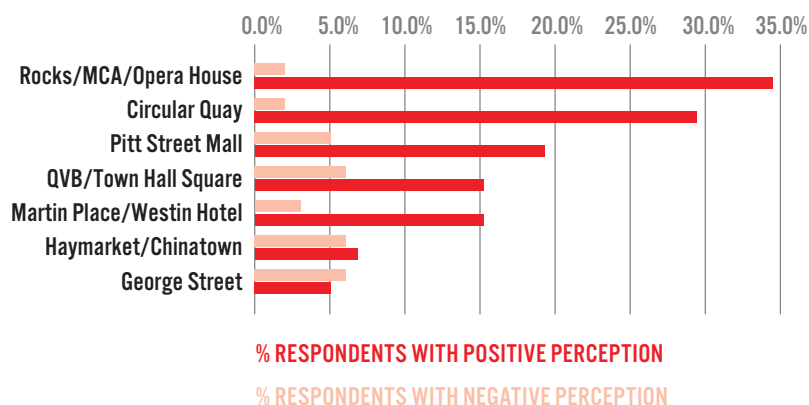
Source: Visitor Wayfinding in Sydney, August 2011
Destination NSW, University of Technology Sydney

03/ PERCEPTIONS OF GEORGE STREET

ONLY 5% OF VISITORS PLACE GEORGE STREET AMONGST THE PLACES IN SYDNEY THAT THEY LIKE, BUT SLIGHTLY MORE REFERENCE GEORGE STREET AS A PLACE THEY DISLIKE

Source: Page 14, City of Sydney Pedestrian Study
Ref No. 2490, Nov 2007, Environmetrics, City of Sydney

VISITOR PERCEPTIONS OF DESTINATIONS



ELEMENTS THAT DETER PEOPLE FROM THE SYDNEY CBD SHOPPING ARE THE CROWDS OF PEOPLE, TRAFFIC CONGESTION AND THE EXPENSIVE PARKING, SHOPPING AND DINING THE COST OF PUBLIC TRANSPORT TO THE CITY AND ALSO BETWEEN CBD SHOPPING DESTINATIONS IS A PROMINENT DETERRENT

Source: Page 4, Perceptions of The City Retail Environment
Ref No. 21029/30, May 2011, V2, Sweeney Research, City of Sydney



04/ IMAGES OF GEORGE STREET

SEARCH RESULT FOR GEORGE STREET IN DECEMBER 2013



Source: CC by Adam.J.W.C. http://upload.wikimedia.org/wikipedia/commons/a/a5/King_street_near_george_st_sydney.jpg



Source: CC by Adam.J.W.C. http://en.wikipedia.org/wiki/George_Street,_Sydney



Source: https://c1.staticflickr.com/3/2369/2523652819_ac04dd9f8c_z.jpg



Source: <http://www.abc.net.au/news/stories/2011/05/16/3217661.htm?site=sydney>



Source: http://www.jenius.com.au/2006/12/anti-ir_rally_george_street.php



Source: http://upload.wikimedia.org/wikipedia/commons/a/a5/King_street_near_george_st_sydney.jpg



Source: <http://www.sydney-australia.biz/photos/wyd/sydney-city-01.php#Uq7UDPTuLjg>



Source: http://www.brushtail.com.au/ost_v0606/george_st_c.1905.html



Source: http://publictransport.about.com/od/Pictures_Of_Transit/ig/Transit-Pictures-from-Sydney/Bus-on-George-Street.htm

05/ 3 DIFFERENT CHARACTERS



George Street covers a stretch of 2.5 km. from north to south and offers various characters along the way. Three prominently distinguishable areas are:

THE BUSINESS DISTRICT

This area is characterised by large scale plot sizes, a high proportion of offices, privately owned open space and no residential dwellings.

THE RETAIL DISTRICT

This area contains the most popular shopping destinations in the CBD – Pitt Street Mall and Queen Victoria Building.

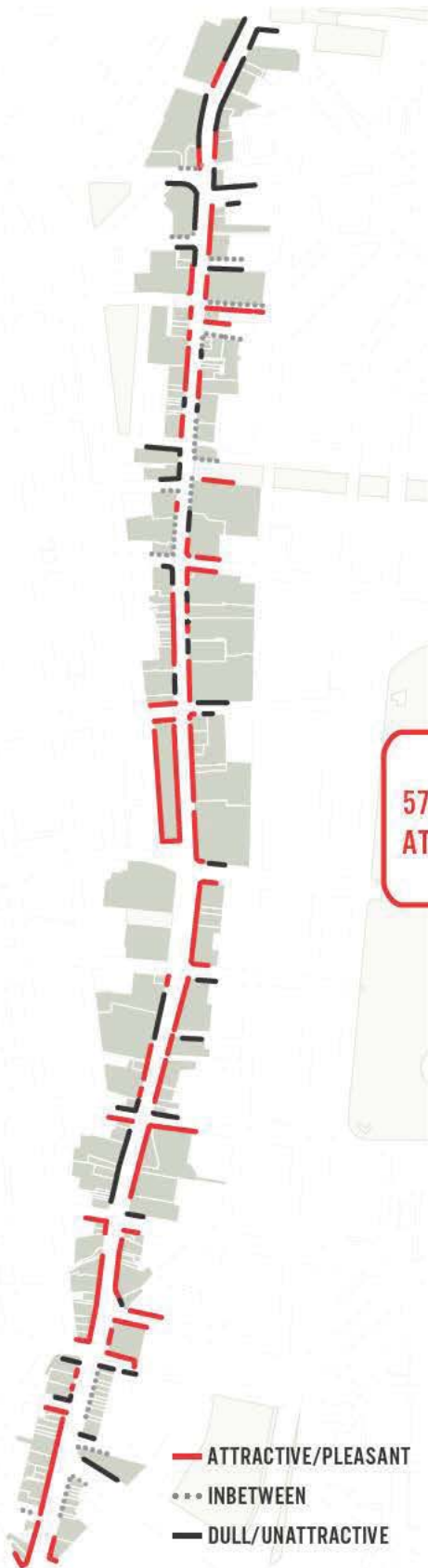
THE ENTERTAINMENT DISTRICT

This area is characterised by small plot sizes and, compared to other districts, has more shops/restaurants and pubs/bars open after midnight. This area also has a higher proportion of residential dwellings.



The middle part of George Street is characterized by Town Hall and the retail precinct around Pitt Street Mall

06 / GROUND FLOOR ACTIVITY



Source: PSPL 2007

George Street has a mix of active and inactive frontages along its 2.5 km length. The most active frontages are found between Bathurst and King Street, which define the retail hub in the CBD. The most inactive frontages are found in the northern part between Jamison Street and Circular Quay, where colonnades, setbacks and banks negatively dominate the street scenery. The remaining parts of George Street are characterized by a mix of active and inactive frontages, but as a main street in Sydney George Street has an unfortunately high proportion of inactive frontages.

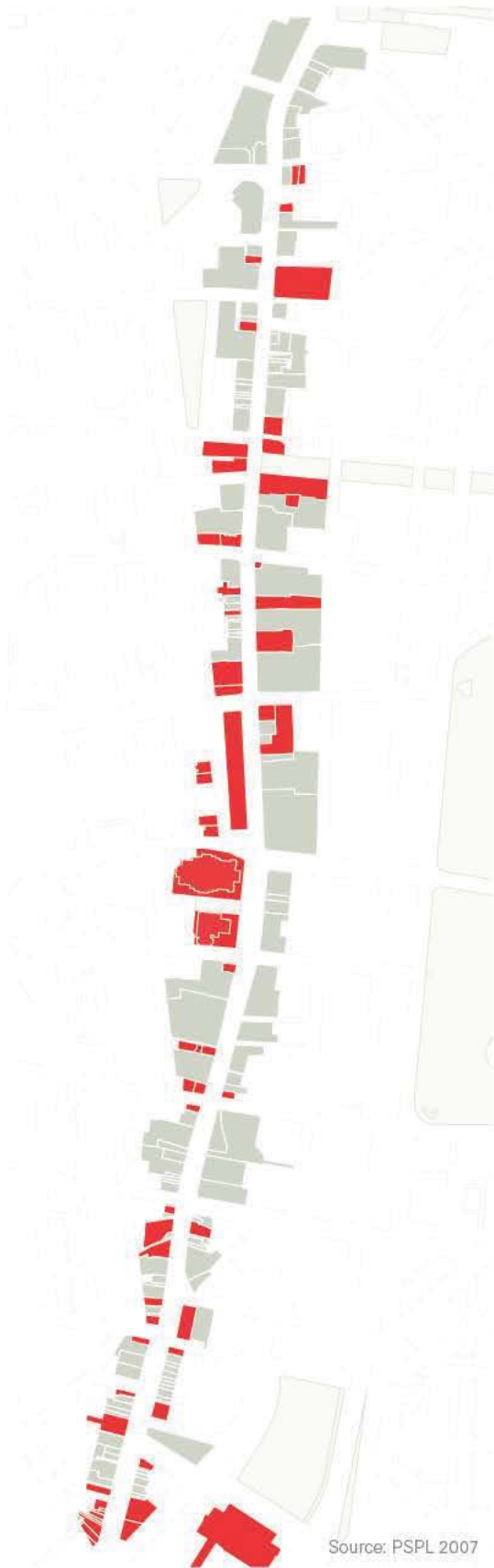
57% OF GROUND FLOOR FRONTAGES ARE ATTRACTIVE AND PLEASANT



Some frontages are withdrawn from George Street and offer little interaction with the street.

07/

HERITAGE BUILDINGS



Source: PSPL 2007

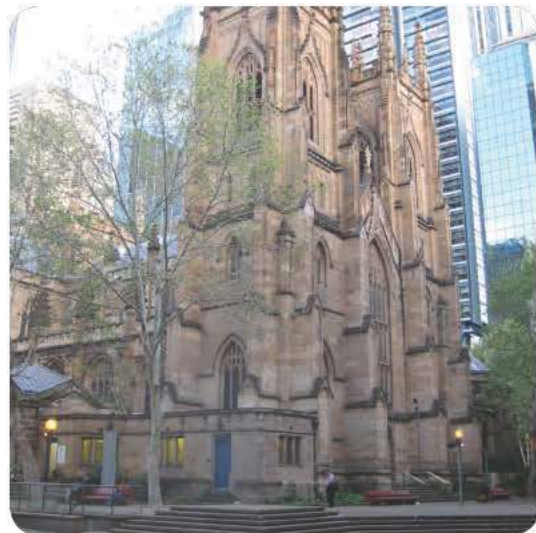
In total 58 buildings are listed under the NSW Heritage Act along George Street.

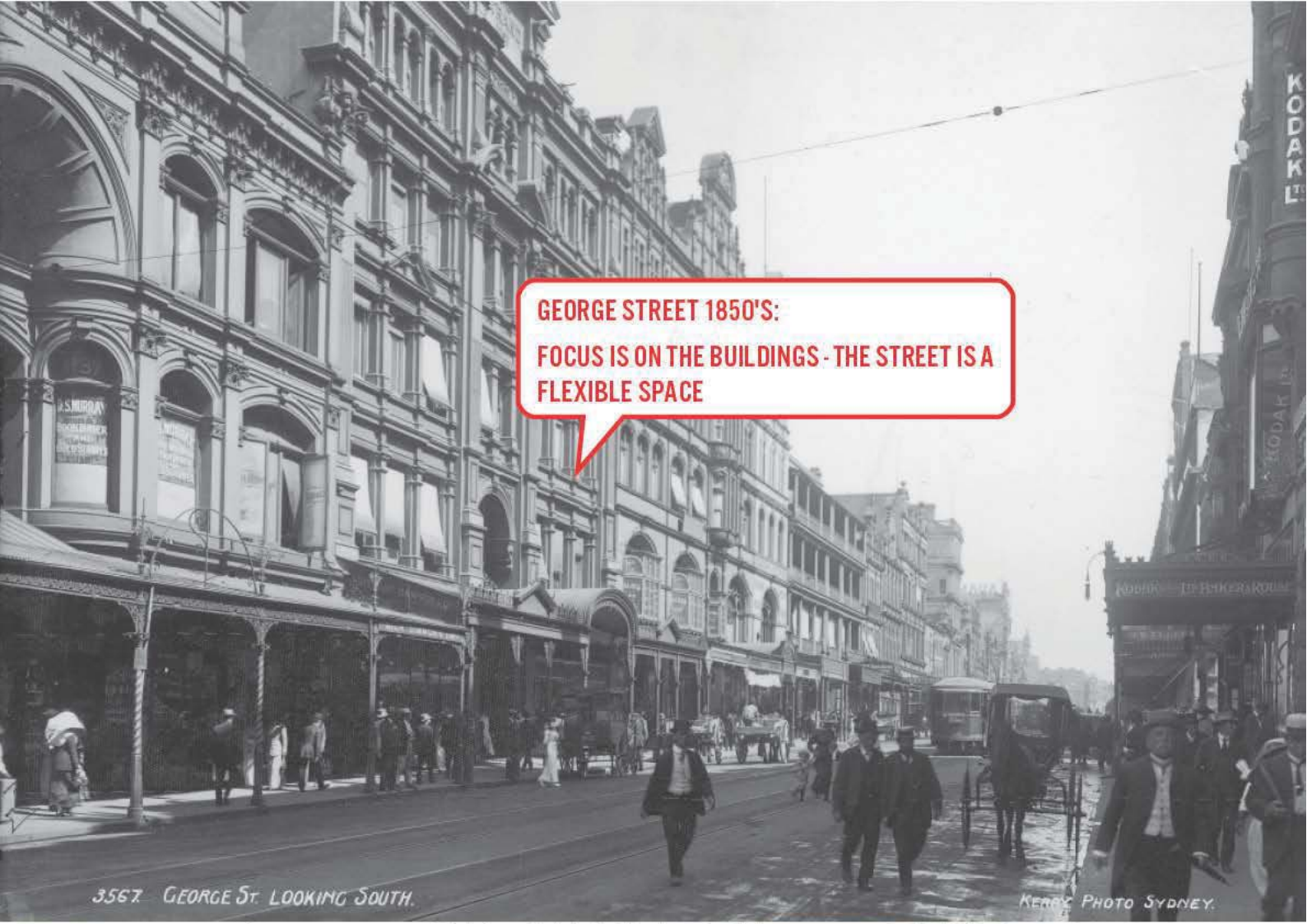
Amongst the listed buildings some stand out as exemplary of the identity of Sydney;

- ANZ Bank (1904)
- St. Laurence Anglican Church (1845)
- Town Hall House (1889)
- St. Andrews Cathedral (1868)
- Queen Victoria Building (1898)
- The Strand (1892)
- State Theatre (1929)

The St. Andrews Cathedral is among Sydney's most prominent Gothic-revival churches and has often served as the 'State' church since its completion in 1868. The building was designed by Edmund Blacket and took 31 years to complete. Today it continues to serve as an important religious site and historical marker of identity for central Sydney.

Source: NSW Government Environment & Heritage





**GEORGE STREET 1850'S:
FOCUS IS ON THE BUILDINGS - THE STREET IS A
FLEXIBLE SPACE**

3567. GEORGE ST. LOOKING SOUTH.

KERRY PHOTO SYDNEY.



**GEORGE STREET 2014:
FOCUS IS ON TRAFFIC - THE STREET HAS LOST
ITS FLEXIBILITY AND DIVERSITY**

TAXI

TAXI

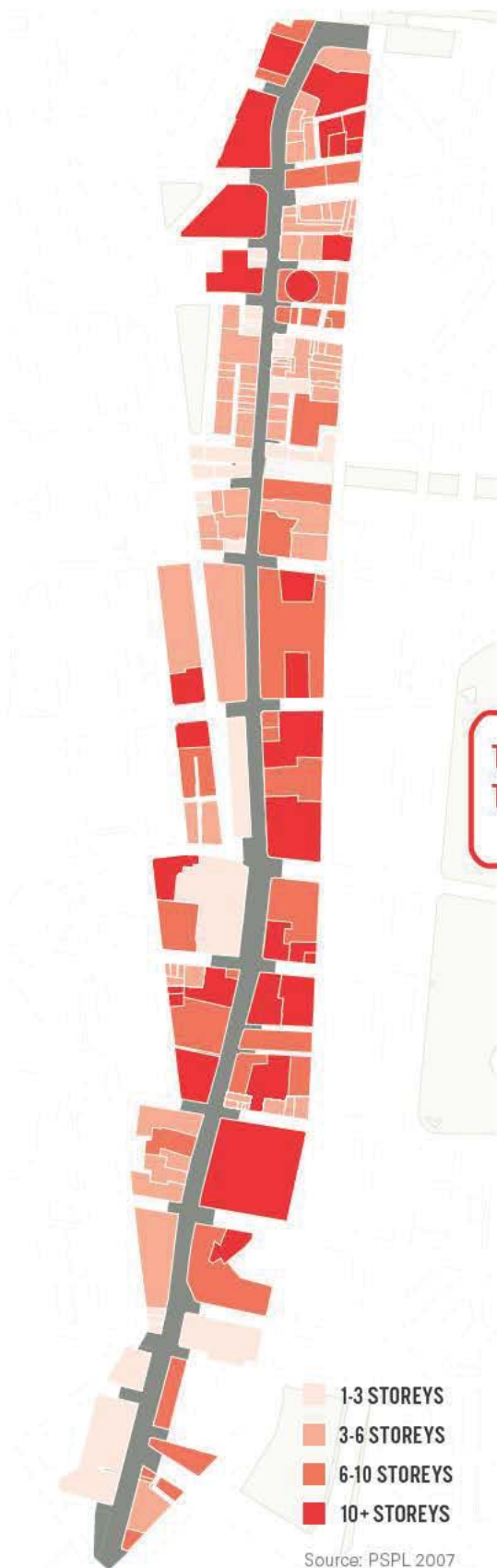
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08/ BUILDING HEIGHTS



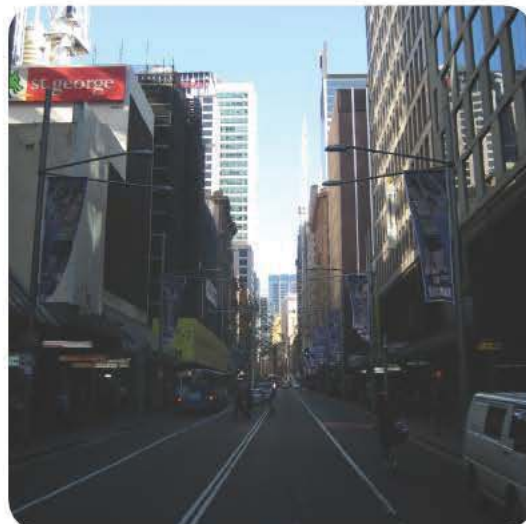
George Street has in recent years seen taller towers erected.

The highest concentration of taller buildings is in the northern part close to Circular Quay, but currently the heights south of Bathurst Street are also rising, e.g. World Square. Generally George Street is experiencing a higher pressure from new developments to challenge the GFA.

The section between Market and Hunter Street has the lowest height levels of generally up to six storeys.

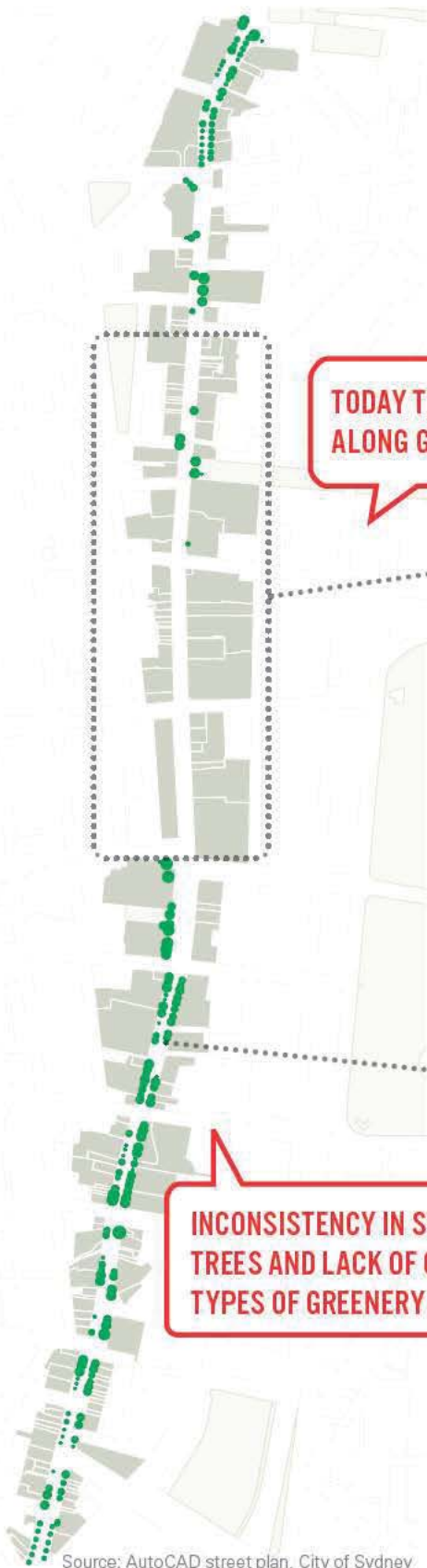
THERE ARE MORE HIGH RISE BUILDINGS HERE THAN ON ANY OTHER STREET IN AUSTRALIA

Source: Wikipedia, 2014



Building heights create cavernous effect along George Street

09 / STREET TREES



George Street has a rather sparse street tree planting because of a narrow street profile, widespread use of awnings and a high impact by the buses in terms of emissions.

TODAY THERE ARE 180 LONDON PLANES ALONG GEORGE STREET



396 George Street

INCONSISTENCY IN STREET TREES AND LACK OF OTHER TYPES OF GREENERY



Near Albion Place

Source: AutoCAD street plan, City of Sydney

10/ PAVING



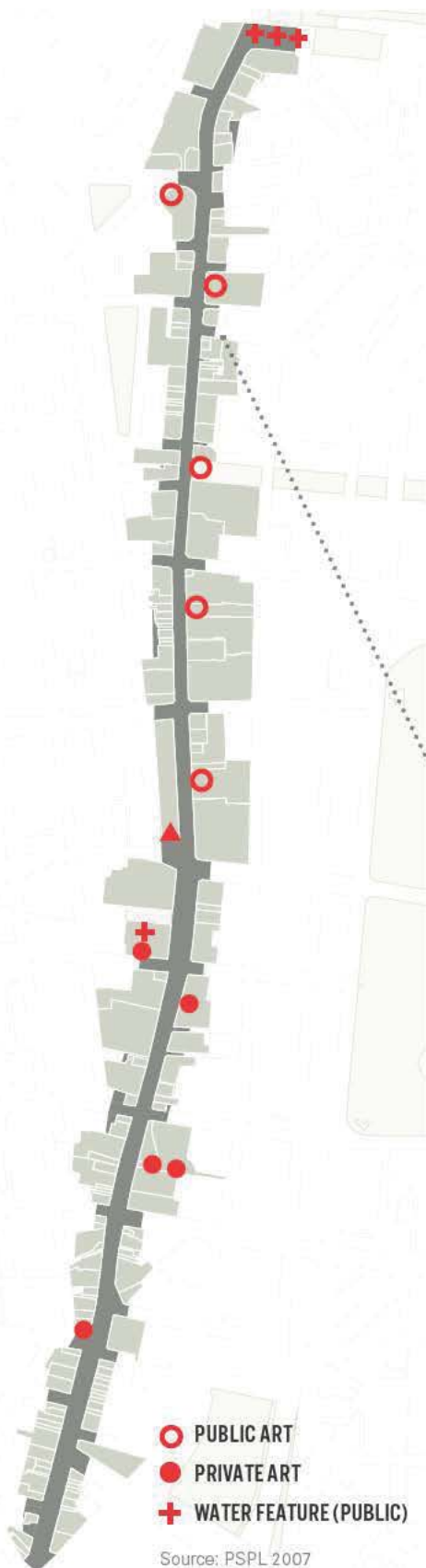
Today the paving along George Street is made up of many small stretches that are cut off at every side street, the result being that there are many disruptions as one walks along the street. In addition, parts of the street are characterized by narrow stretches of paving 2.5m wide. In total the paved footpath areas – today 24,500m² – make up a 39% of the average street width allocation.

PEDESTRIAN SPACE WILL MORE THAN DOUBLE ALONG GEORGE STREET WITH PLANNED IMPROVEMENTS

Source: City of Sydney



11 / PUBLIC ART



Source: PSPL 2007

There are a number of public art installations in George Street ranging from water features to sculptures.

It is primarily individual art pieces that represent a multitude of genres, motifs, materials, sizes and tastes.

The Public Art Strategy illustrates a coherent approach to public art in the CBD and the future improvements of George Street will see public art installed according to the overall strategy.

**14 INDIVIDUAL ART PIECES
IN GEORGE STREET**



'Youngsters' by Caroline Rothwell, George Street & Barrack Street. City of Sydney

MOBILITY

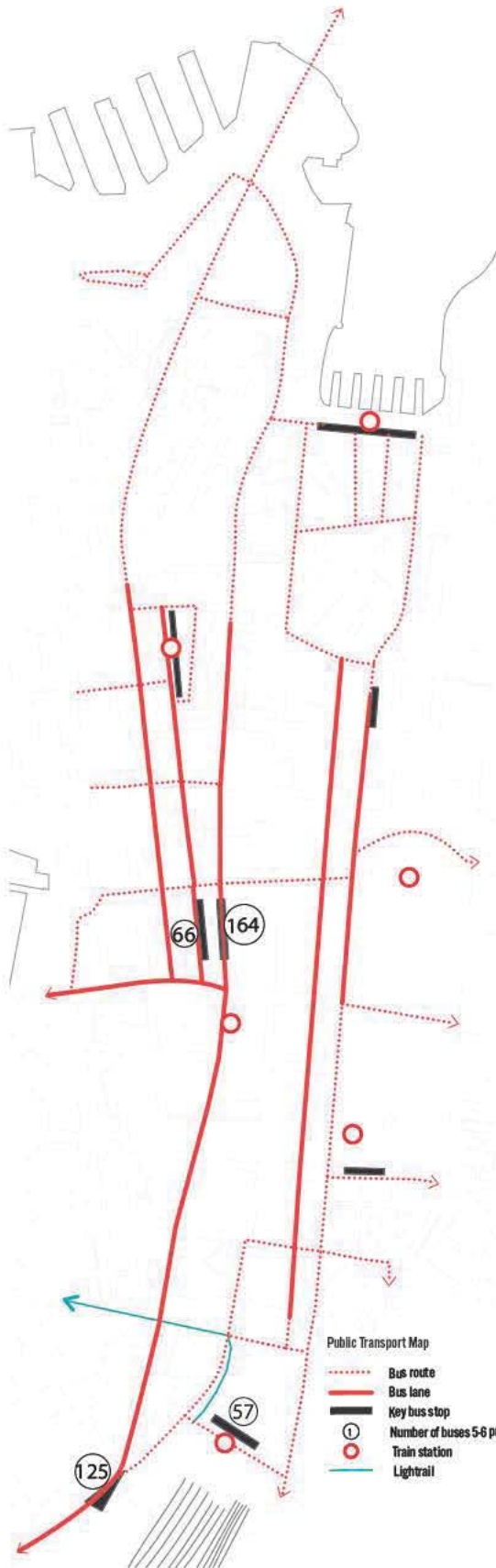
KEY PERFORMANCE INDICATORS

- INCREASED PERCENTAGE OF PEDESTRIAN TRAFFIC
- INCREASE IN EVENING PEDESTRIAN TRAFFIC
- DECREASE IN PEDESTRIAN INJURIES
- REDUCED TRAVEL TIME ALONG GEORGE STREET

IN 10 YEARS PEDESTRIANS AND PUBLIC
TRANSPORT USERS WILL BE ABLE TO MOVE
MORE EFFICIENTLY THROUGH GEORGE STREET



01/ PUBLIC TRANSPORT NETWORK



GEORGE STREET CARRIES OVER 36,000* BUS PASSENGERS A DAY

* Sydney Buses Cordon Counts, 19th September 2012, Transport for NSW

IT CAN TAKE UP TO 30 MINUTES TO TRAVEL FROM CENTRAL TO CIRCULAR QUAY

* Sydney's light rail future. Transport NSW

"THERE WAS GENERAL DISQUIET ABOUT USING BUSES BECAUSE OF UNCERTAINTY ABOUT ROUTES AND WHERE TO ALIGHT, AND THE BELIEF THAT THEY SIMPLY TAKE TOO LONG. TRAINS WERE SEEN AS MORE EFFICIENT"

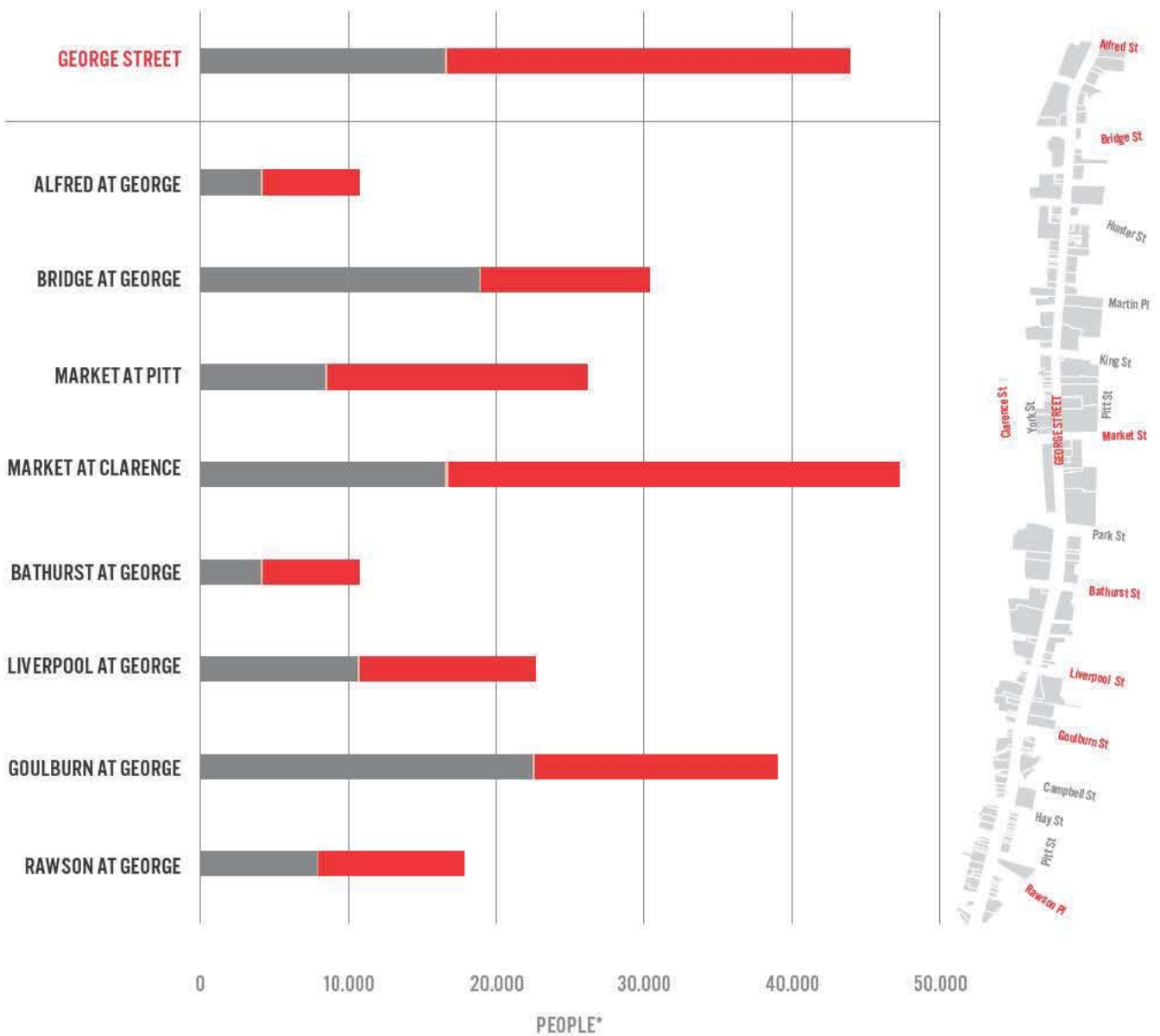
Source: Visitor Wayfinding in Sydney, August 2011
Destination NSW, University of Technology, Sydney



02 / MODAL COUNT

Modal Count
6am-6pm, May 2012

GEORGE STREET AND SURROUNDING AREAS



*NOTE: Vehicle numbers include buses, ridership numbers not available for cross streets.
George St represented by average of George St at Bridge St, Bathurst St, Liverpool St, and Goulburn St.

03 / PEDESTRIAN NETWORK

Pedestrian Count
6am-12am, 4th and 8th of December 2012

Pedestrian activity varies drastically throughout the week in upper George Street, with weekday volume levels over three times as high as weekends in certain locations. Lower George Street sees much more consistent public life into the weekend, with pedestrian activity occasionally topping weekday levels in the entertainment district.

MARTIN AT GEORGE

48,500
13,300

KING AT GEORGE

17,200
17,600

MARKET AT GEORGE

50,000
48,000

BATHURST AT GEORGE

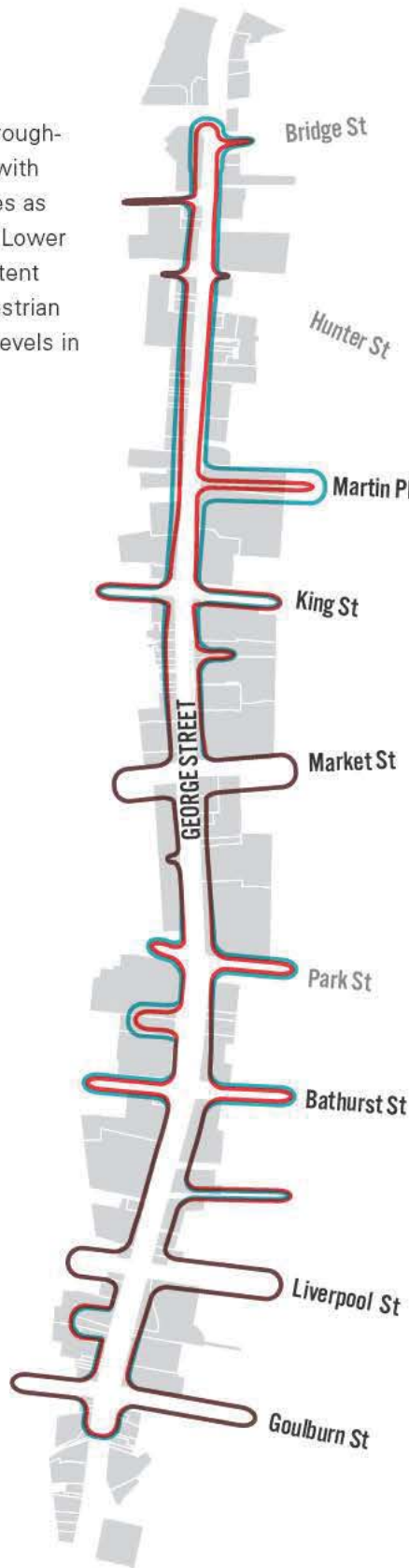
21,300
17,200

LIVERPOOL AT GEORGE

39,900
40,900

GOULBURN AT GEORGE

21,300
29,200



DAILY PEDESTRIAN VOLUMES

WEEKDAY

SATURDAY

GEORGE AT MARTIN

46,900
28,700

GEORGE AT KING

53,200
35,700

GEORGE AT MARKET

61,900
59,800

GEORGE AT BATHURST

76,200
72,200

GEORGE AT LIVERPOOL

86,900
73,000

GEORGE AT GOULBURN

64,300
51,100

Throughout most of George Street, pedestrian levels are lowest in the morning and peak in the afternoon. South of Market Street, pedestrian activity persists and sometimes increases after 5:00pm whereas activity drops slightly in upper George Street.



PEAK WEEKDAY HOUR PEDESTRIAN VOLUMES

8:00AM
1:00PM
5:00PM

MARTIN AT GEORGE

6,280
4,560
6,320

KING AT GEORGE

230
1,430
1,340

MARKET AT GEORGE

3,390
5,820
4,520

BATHURST AT GEORGE

1,160
1,800
2,290

LIVERPOOL AT GEORGE

1,480
2,890
3,650

GOULBURN AT GEORGE

1,180
2,650
3,090

GEORGE AT MARTIN

3,360
5,390
4,420

GEORGE AT KING

3,370
6,400
4,900

GEORGE AT MARKET

2,760
7,180
6,640

GEORGE AT BATHURST

3,600
6,730
7,400

GEORGE AT LIVERPOOL

4,480
7,860
7,510

GEORGE AT GOULBURN

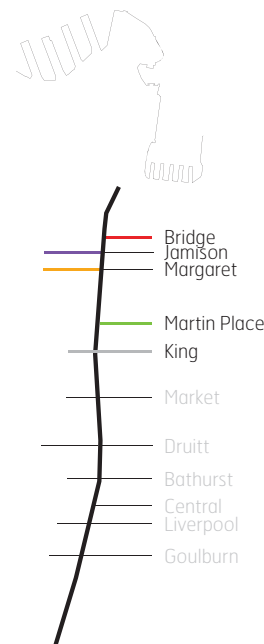
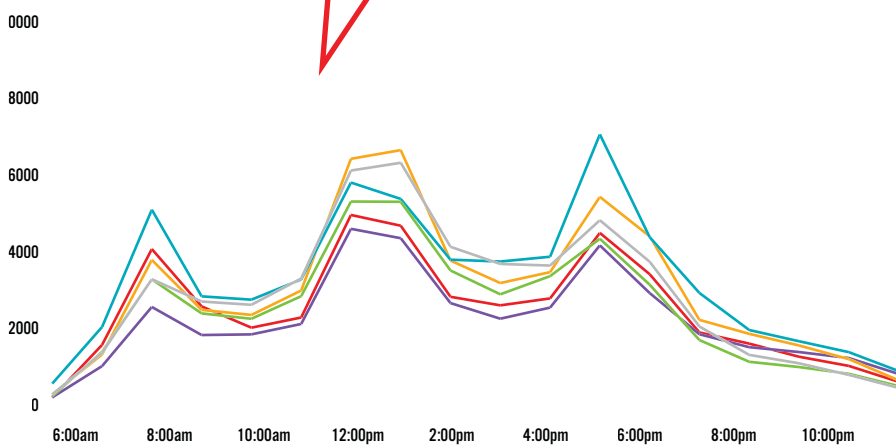
2,320
5,460
6,570

04 / GEORGE STREET PEDESTRIAN VOLUME PATTERNS

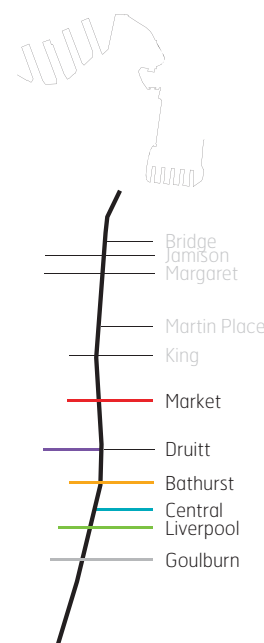
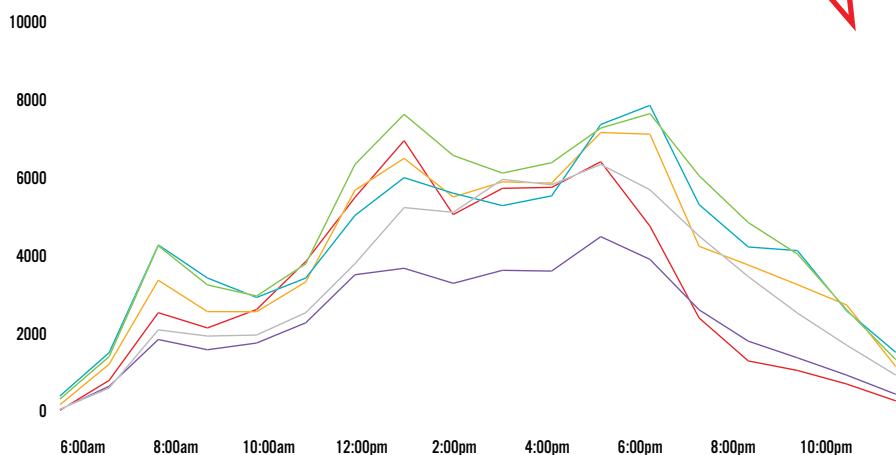
WEEKDAY

Pedestrian Count
6am-12am,
4th and 8th of December

THE FLOW OF PEDESTRIANS THROUGHOUT UPPER GEORGE STREET FOLLOWS A VERY ROUTINE PATTERN, WITH HIGH PEAKS AT 8:00AM, 1:00PM, AND 5:00PM, PUNCTUATED BY LULLS OF TRAFFIC IN BETWEEN ON WEEKDAYS. THIS PATTERN IS A COMMON FEATURE OF CENTRAL BUSINESS DISTRICTS WHERE ONLY THE NECESSARY ACTIVITIES OF A STANDARD WORK DAY TAKE PLACE



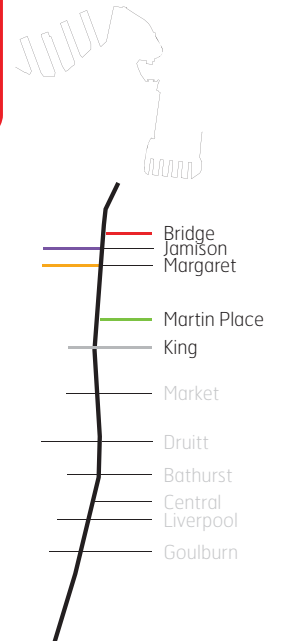
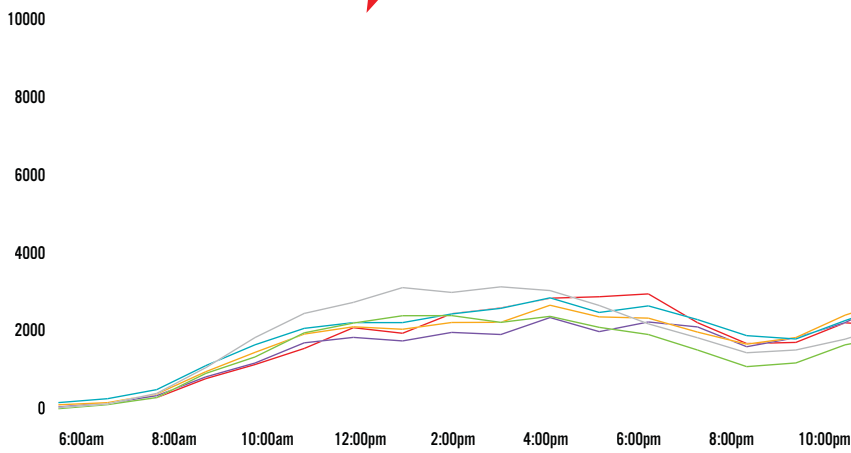
LOWER GEORGE STREET FEATURES PEDESTRIAN VOLUME PATTERNS SUGGESTING A MORE DIVERSE ARRAY OF ACTIVITIES WITH HIGH TRAFFIC LEVELS EVEN BETWEEN PEAK HOURS. THOUGH IT DROPS PRECIPITOUSLY ON WEEKDAYS, GEORGE STREET BETWEEN BATHURST AND GOULBURN MAINTAINS SOME PEDESTRIAN TRAFFIC INTO THE EVENING HOURS



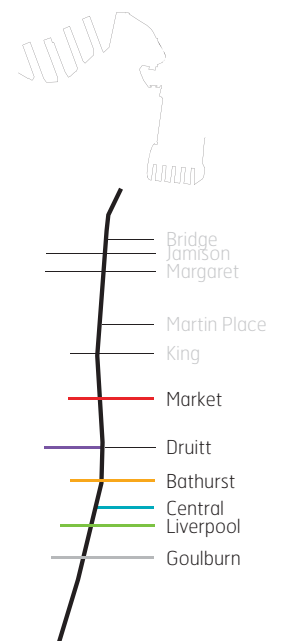
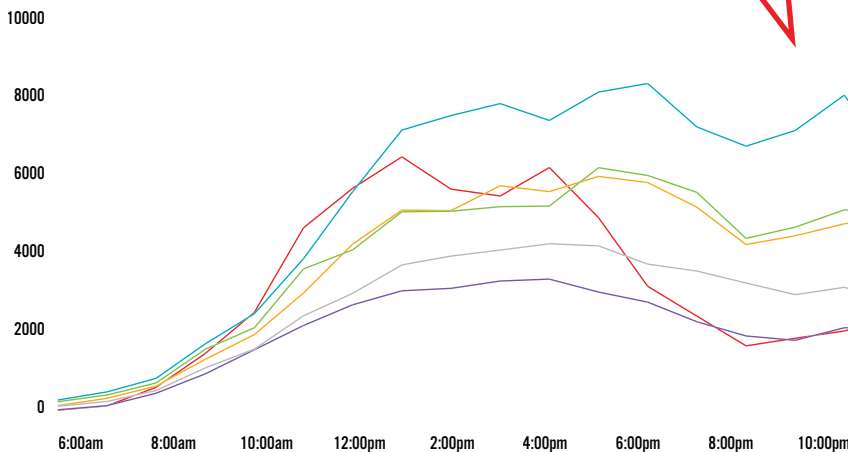
WEEKEND

Pedestrian Count
6am-12am,
4th and 8th of December 2012

ON WEEKENDS, THE VITALITY OF UPPER GEORGE STREET HUSHES TO A SHADOW OF ITS WEEKDAY BUSTLE, WITH PEDESTRIAN VOLUMES DROPPING BY AS MUCH AS 42% AT HUNTER STREET. THESE PATTERNS FURTHER SUGGEST A MONO-FUNCTIONAL STRETCH OF GEORGE STREET WITH OPPORTUNITY FOR DIVERSIFIED ACTIVITIES



LOWER GEORGE STREET SEES SIMILAR AND SOMETIMES GREATER VOLUMES OF PEDESTRIANS ON WEEKENDS, ESPECIALLY AT CENTRAL STREET WHERE VOLUME INCREASES BY 24% OVER WEEKDAY LEVELS. HIGH LEVELS OF PEDESTRIAN ACTIVITY PERSIST INTO THE EVENING HOURS BETWEEN BATHURST STREET AND LIVERPOOL STREET

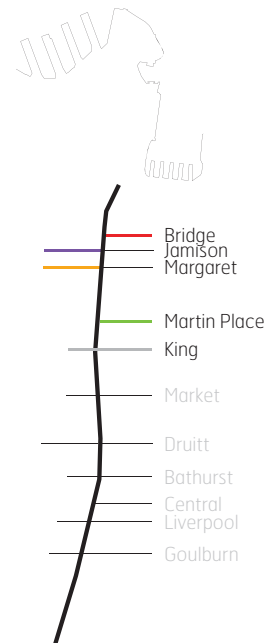
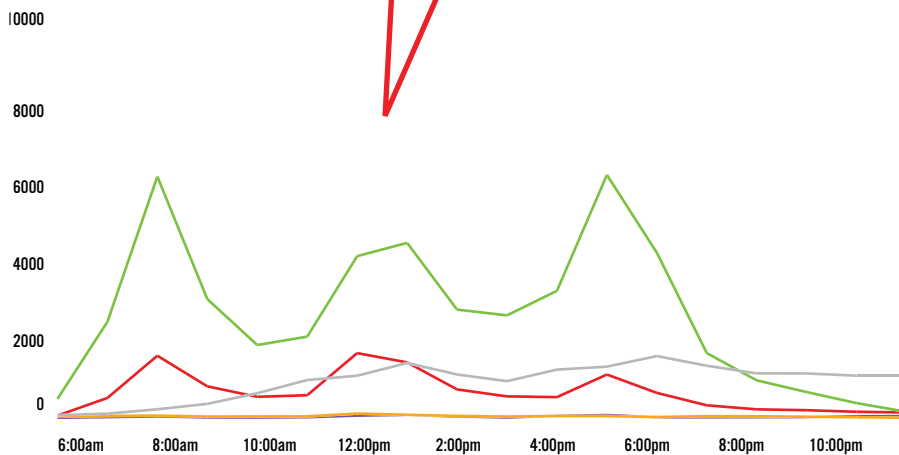


05 / CROSS STREETS PEDESTRIAN VOLUME PATTERNS

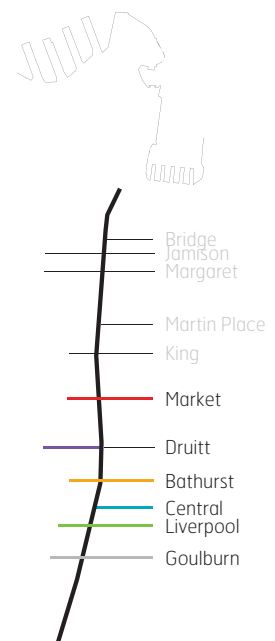
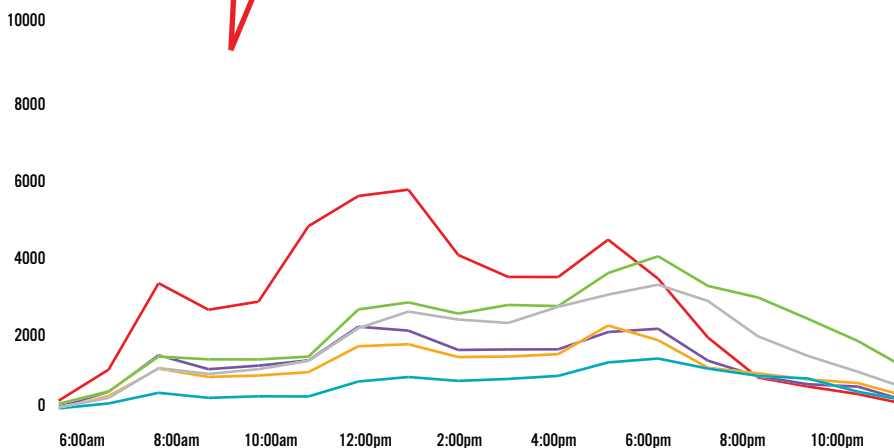
WEEKDAY

Pedestrian Count
6am-12am,
4th and 8th of December 2012

PEDESTRIAN VOLUME PATTERNS ON THE STREETS INTERSECTING GEORGE STREET HIERARCHIES OF PEDESTRIAN PREFERENCE AMONG THESE STREETS. MARTIN PLACE AND BRIDGE STREET SHOW PATTERNS OF DISTINCT PEAK HOURS, WHILE STREETS LIKE JAMISON STREET AND MARGARET STREET CURRENTLY HAVE BARELY ANY FOOT TRAFFIC AT ALL



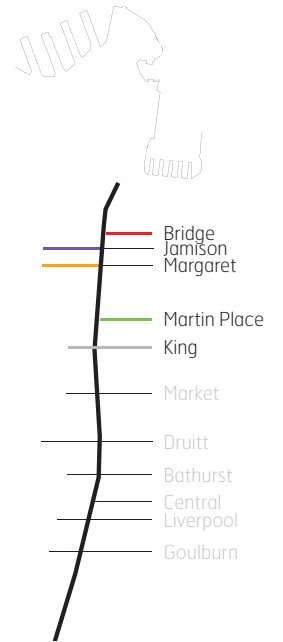
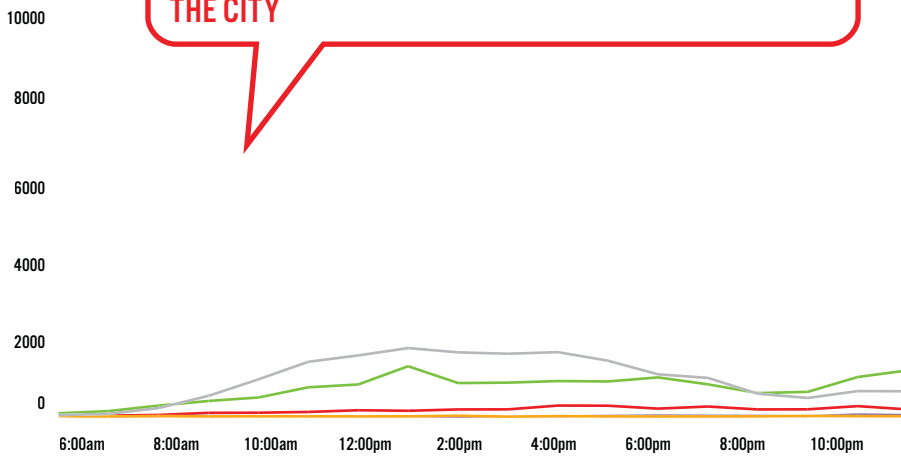
LOWER GEORGE STREET SEES MORE DISPERSED FOOT TRAFFIC ACROSS ITS INTERSECTING STREETS, WITH MARKET STANDING OUT AS A PARTICULARLY HIGH TRAFFIC PEDESTRIAN CORRIDOR



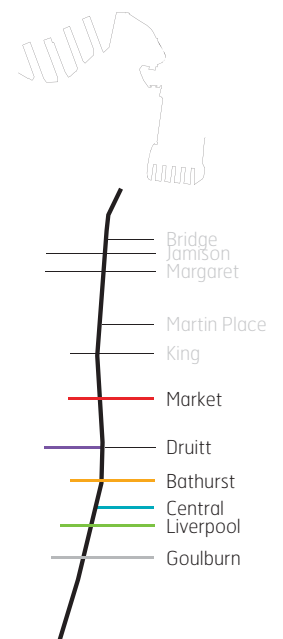
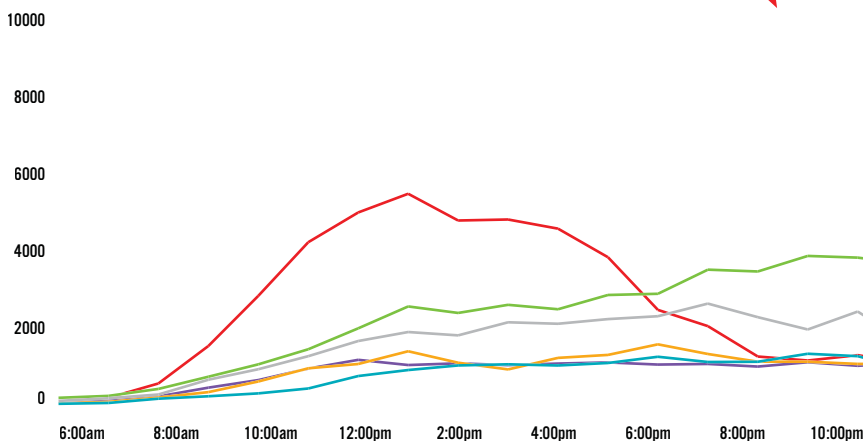
WEEKEND

Pedestrian Count
6am-12am,
4th and 8th of December 2012

UPPER GEORGE STREET'S INTERSECTING STREETS EXPERIENCE VERY LOW PEDESTRIAN VOLUMES ON WEEKENDS, SUGGESTING AN UNDERUTILISED PART OF THE CITY



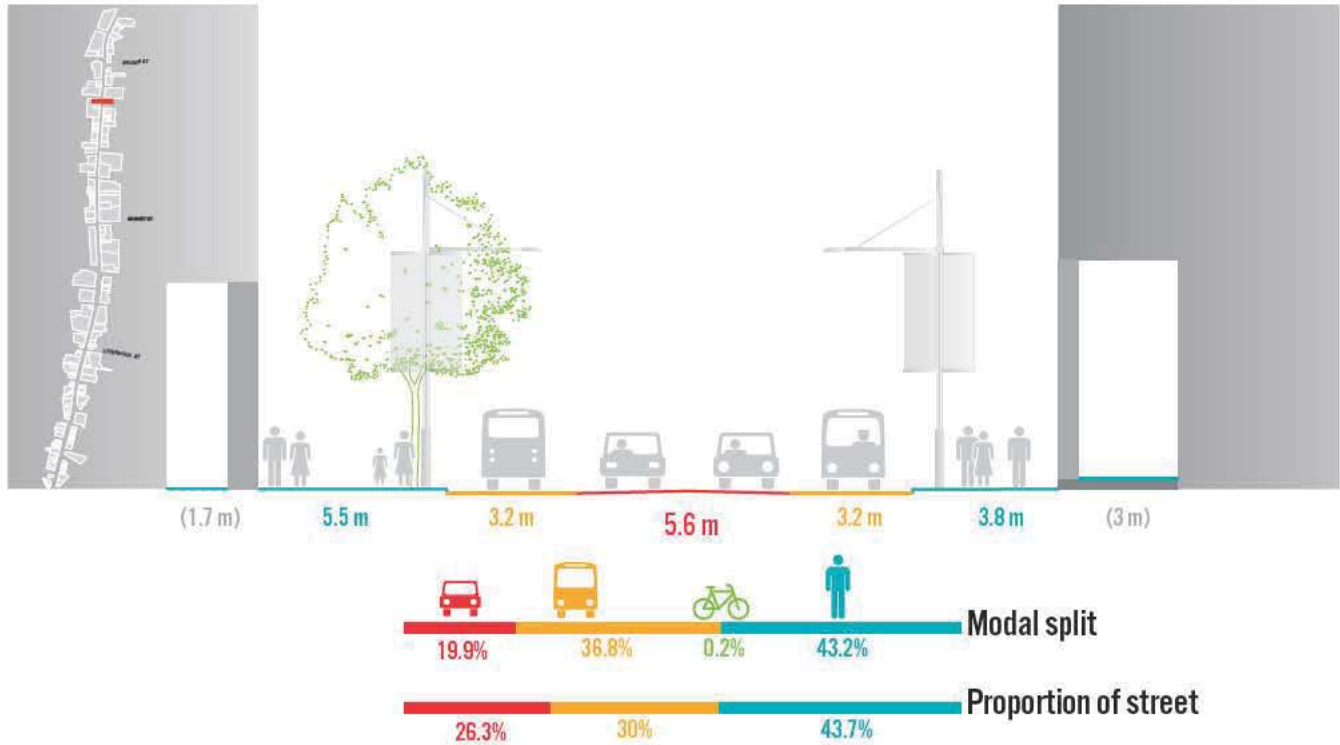
MARKET STREET REMAINS A PROMINENT PEDESTRIAN CORRIDOR ON WEEKENDS, WHEREAS OTHER CROSS STREETS EXPERIENCE RELATIVELY LOW VOLUMES. LIVERPOOL STREET AND GOULBURN STREET COME TO LIFE MORE PROMINENTLY IN THE WEEKEND EVENING HOURS



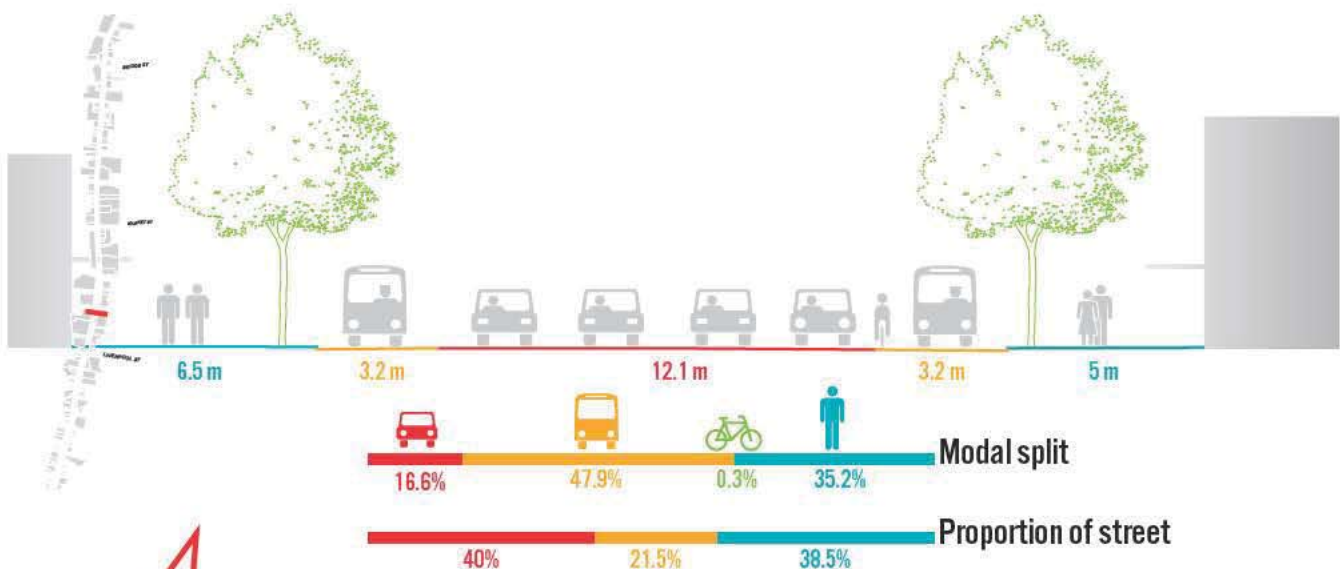
06 / SPACE ALLOCATION

Registration: Pedestrian, Cyclist, Vehicle
 6.00am-7.00pm, May 2012
 Bus:
 6.00am-7.00pm Sep 2012

GEORGE STREET AT BRIDGE STREET



GEORGE STREET AT BATHURST STREET

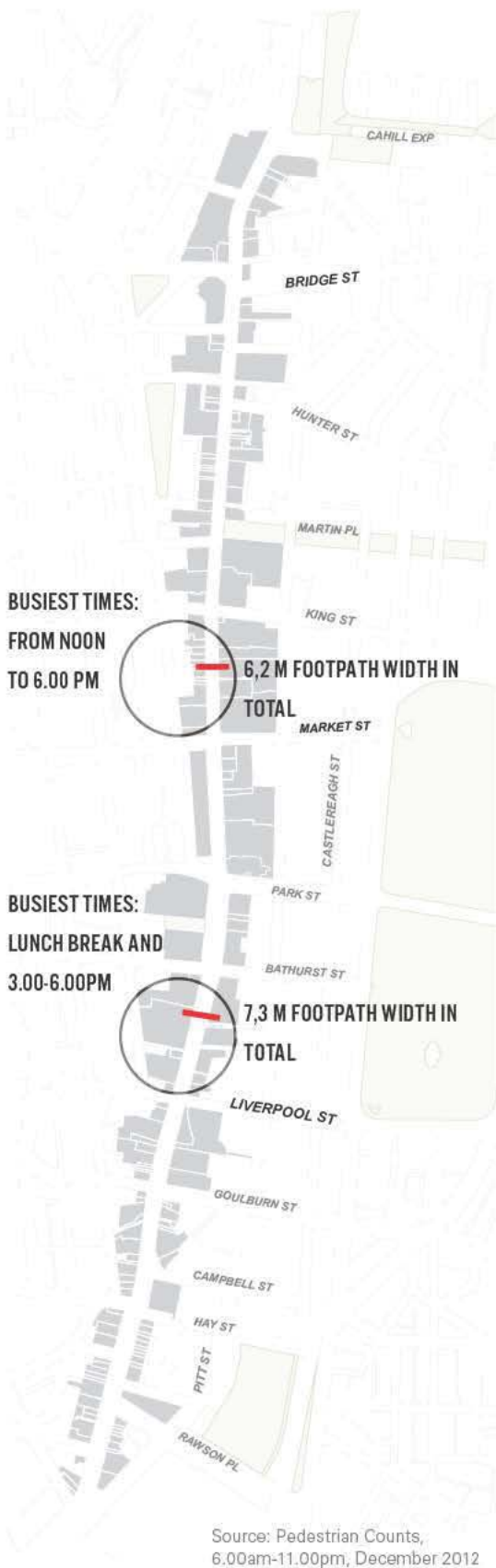


GEORGE STREET CARRIES MORE THAN TWICE AS MANY PEDESTRIANS AS VEHICLES, THOUGH CARS ARE OFTEN GIVEN MORE SPACE. CATERING TO PEDESTRIAN TRAFFIC WILL IMPROVE THE QUALITY OF GEORGE STREET AS WELL AS EFFICIENCY AND CARRYING CAPACITY

07/

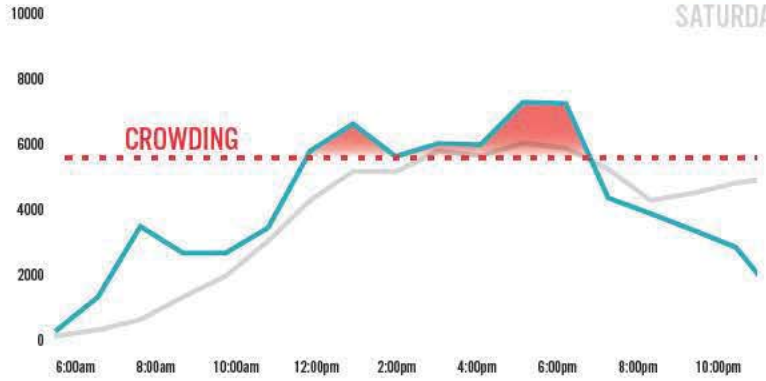
A CROWDED STREET

Pedestrian Count 6am-12am,
4th and 8th of December 2012



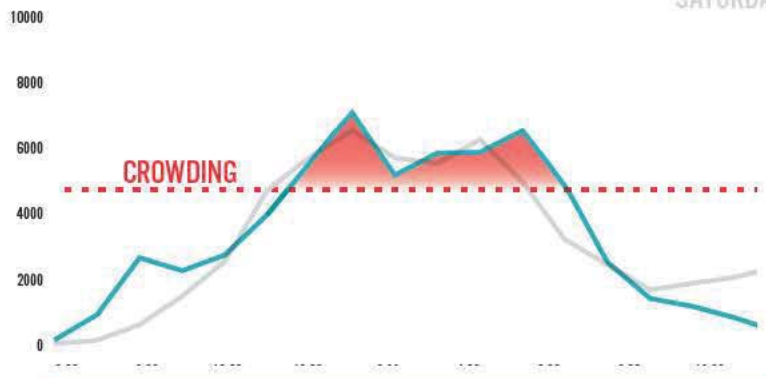
GEORGE STREET AT MARKET STREET

WEEKDAY
SATURDAY



GEORGE STREET AT BATHURST STREET

WEEKDAY
SATURDAY

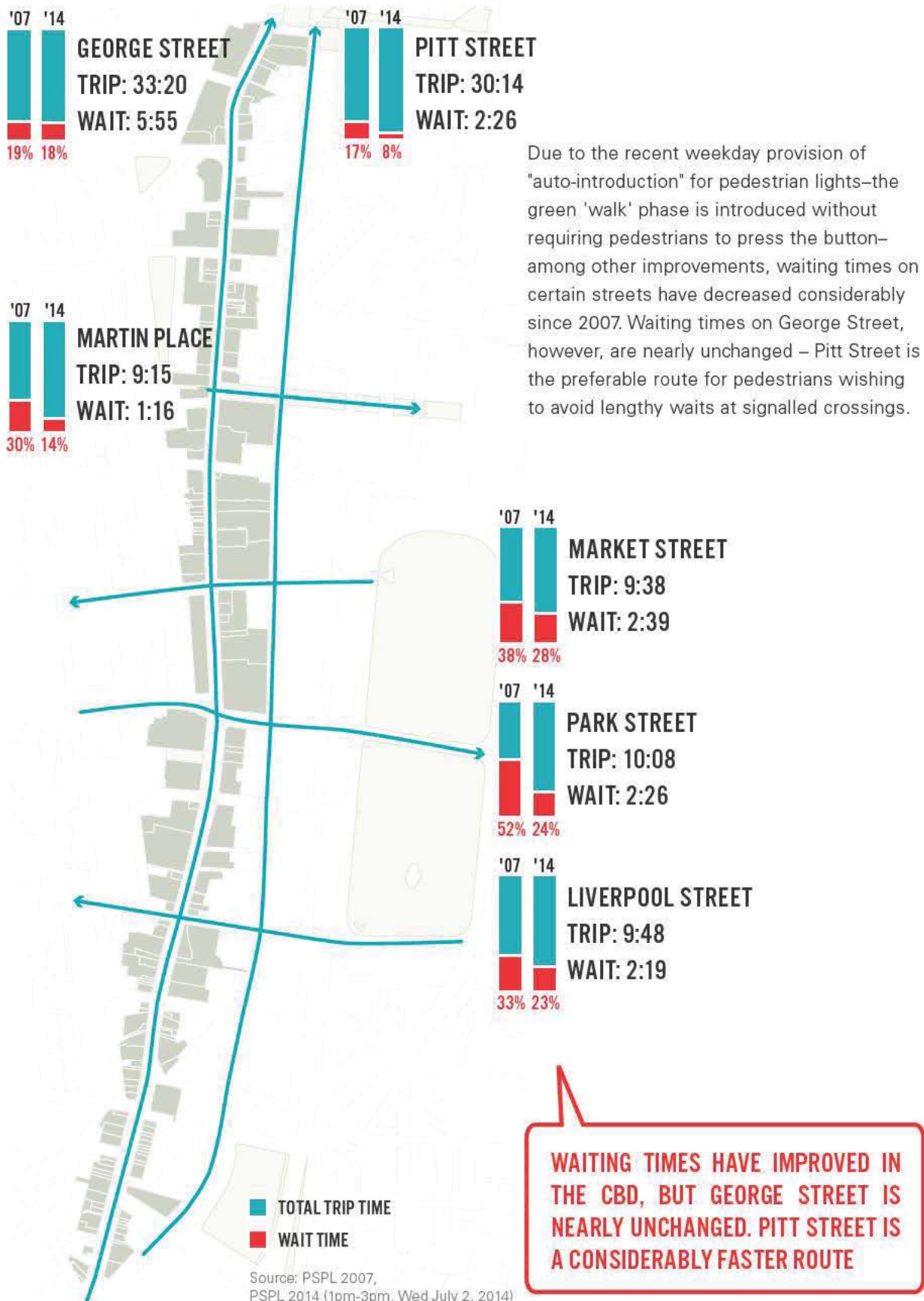


IN CENTRAL GEORGE STREET THE PEDESTRIAN NUMBERS GO UP AND THE FOOTPATH WIDTH DECREASE CAUSING A HIGHER DEGREE OF CROWDING. THE PEDESTRIAN NUMBERS ARE AT SATURATION

Crowding based on 13 pedestrians /meter of available footpath width /minute



08 / WAITING TIME AT CROSSINGS



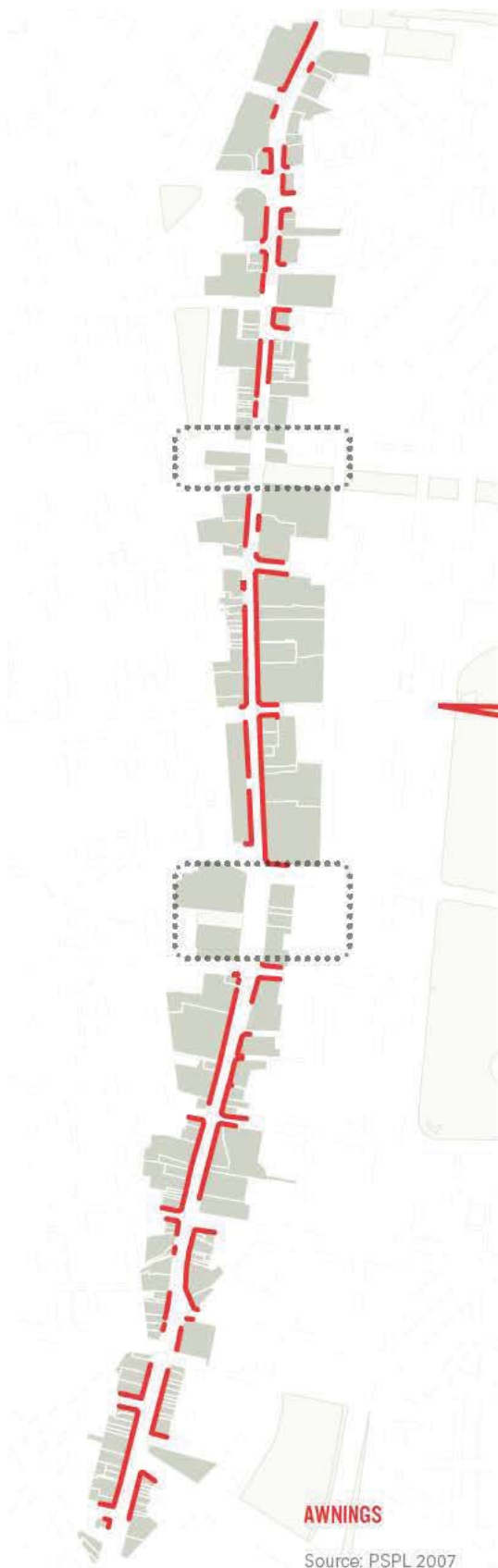
09/ PEDESTRIAN INJURIES



Since 2008 pedestrian injuries have occurred along nearly all stretches of George Street cementing that George Street is a main traffic artery in the CBD with a high impact of especially buses. Injuries during the day have tended to occur around Bridge Street, Martin Place, Market Street, between Park Street and Bathurst Street, and Liverpool Street. While the locations of injuries occurring at night do not differ drastically from those at day, they tend to concentrate between Bathurst Street and Liverpool Street as well as between Martin Place and Bridge Street. Pedestrian injuries in this latter stretch of upper George Street is particularly unusual given the low pedestrian levels in this area at night. This discrepancy suggests pedestrian safety may have room for improvement specifically in these areas.

PEDESTRIAN INJURIES OCCUR IN THE EVENING ON UPPER GEORGE STREET DISPROPORTIONATELY TO THE NUMBER OF PEDESTRIANS

10/ AWNINGS



AWNINGS

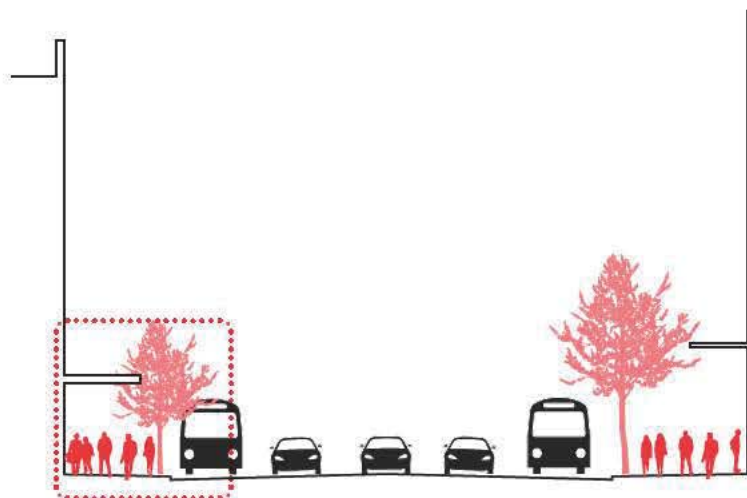
Source: PSPL 2007

The awnings are part of a design tradition but also essential elements in providing weather protection. Along George Street there is a more or less continuous use of awnings. Recent awnings however challenge the function of the awnings by being placed above second levels.

The quality of the existing awnings is inconsistent and in several locations space is quite confined by low awnings, street clutter, congested streets and limited footpath widths.

ALMOST CONTINUOUS WEATHER PROTECTION ALONG GEORGE STREET

THE QUALITY OF THE AWNINGS IS HOWEVER INCONSISTENT

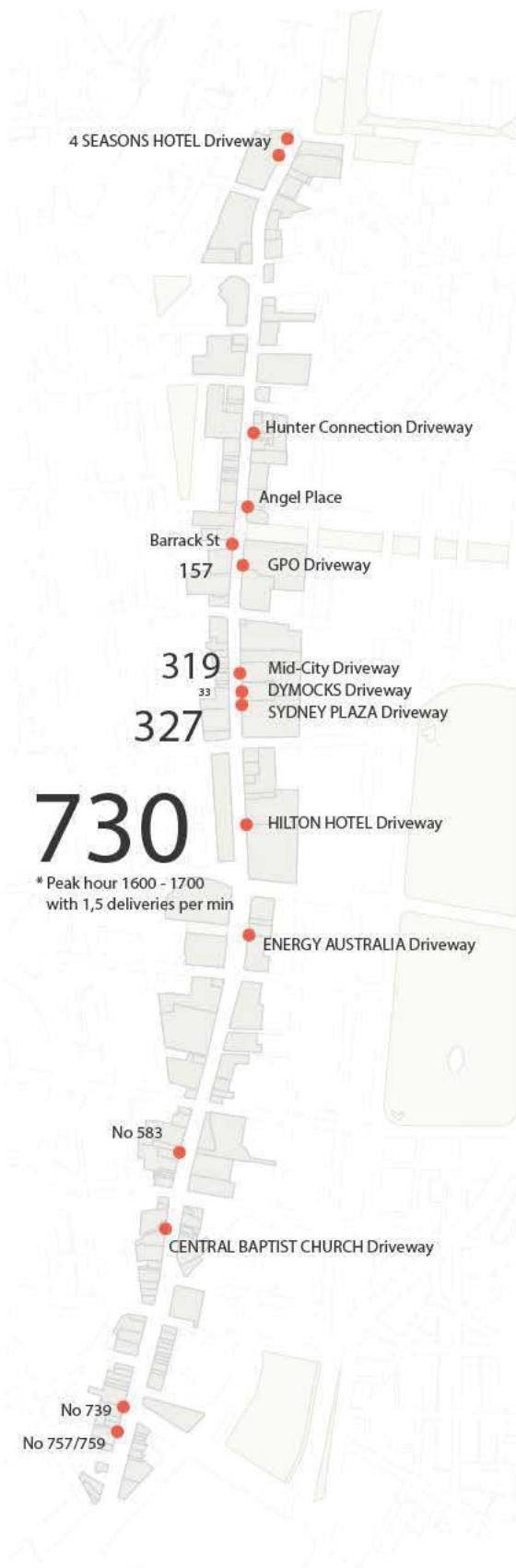


GEORGE STREET SECTION

The placement of the awning is being challenged in new developments

11 / DRIVEWAY COUNT CENTRAL GEORGE STREET

Registration: 7.00am-7.00pm
February 2013, City of Sydney



Driveways tend to be concentrated between Martin Place and Park Street along George Street. These driveways break the footpath and create conflict between pedestrians and delivery vehicles. Between 16:00 and 17:00, these conflicts occur at a rate of 1.5 deliveries per minute.

THERE ARE 15 DRIVEWAYS ALONG GEORGE STREET

THE HILTON DRIVEWAY IS THE MOST FREQUENTLY USED DRIVEWAY



Hilton Driveway, George Street. City of Sydney

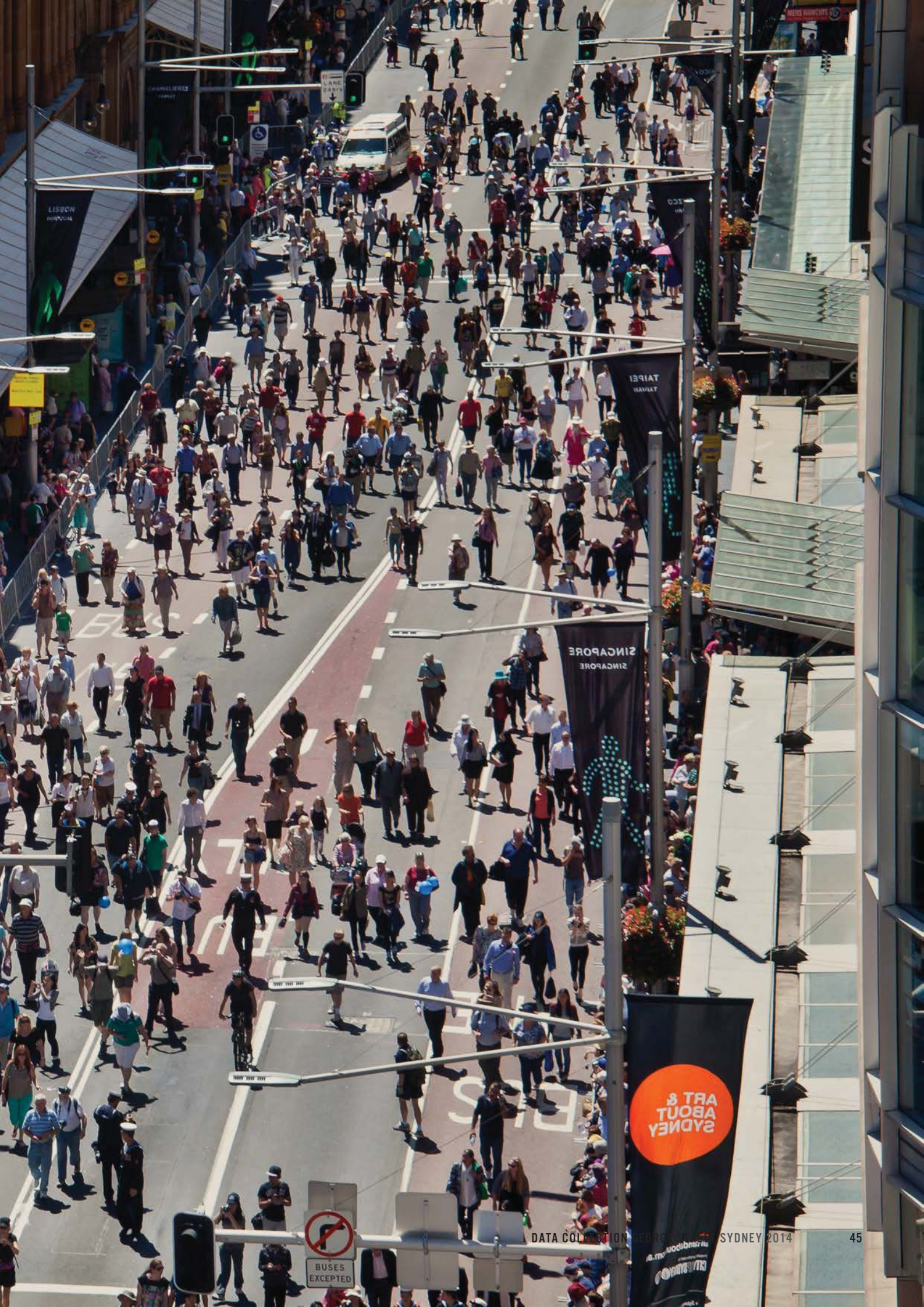
PUBLIC LIFE

KEY PERFORMANCE INDICATORS

- MORE STAYING ACTIVITY ALONG GEORGE STREET
- MORE NIGHT LIFE ACTIVITY ALL ALONG GEORGE STREET
- MORE OUTDOOR CAFÉ SEATING
- REDUCED NOISE LEVELS & IMPROVED AIR QUALITY

IN 10 YEARS LINGERING ACTIVITY ALONG
GEORGE STREET WILL INCREASE BY MORE
THAN 100%

ABOUT
SYDNEY



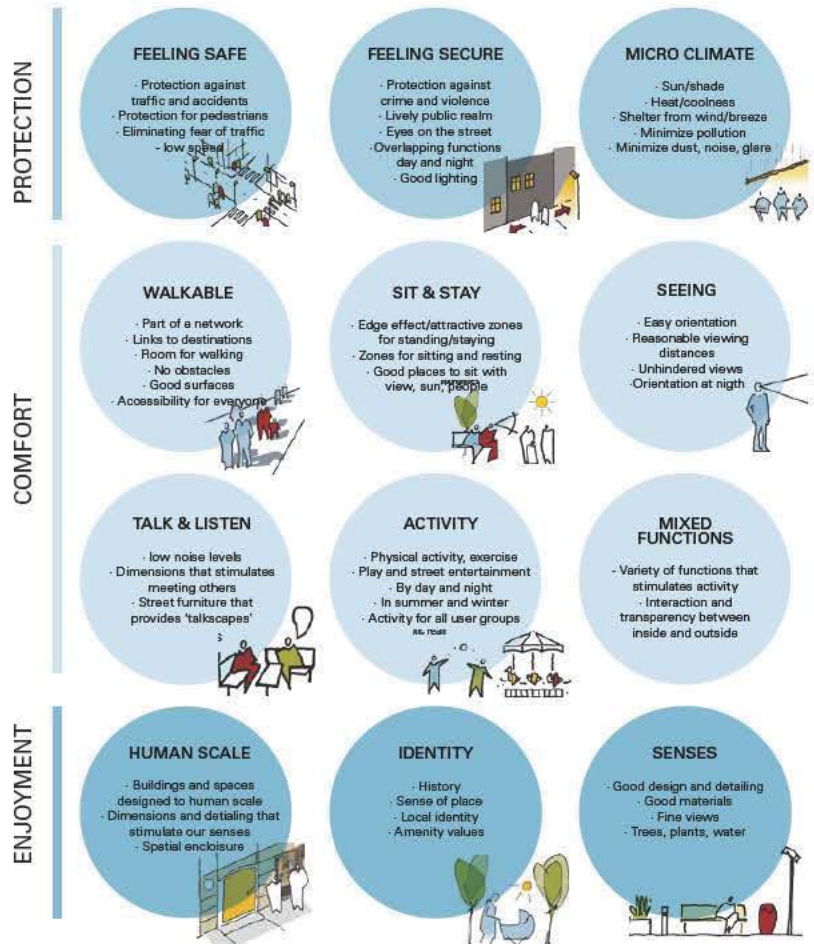
01 / 12 QUALITY CRITERIA

Evaluation of a public space/street based on a set of fundamental qualities is a basic way of assessing the potentials for public life to unfold. These qualities center around **protection, comfort and enjoyment** and they emphasize the need to consider some basic issues besides aesthetics and design. The two first categories are more factual and objective whereas the last category of criteria are more subjective.

The qualities of protection (against risk, physical injury, insecurity and unpleasant sensory influences, the negative aspects of climate in particular) are considered fundamental to a space.

The qualities of comfort involves invitations for people to activate the space: possibilities for walking, standing, sitting, seeing, talking, hearing and self-expression, as well as mixed functions around the space.

Finally, enjoyment involves aspects of human scale, identity and opportunities for positive sensory impressions and aesthetic experiences.



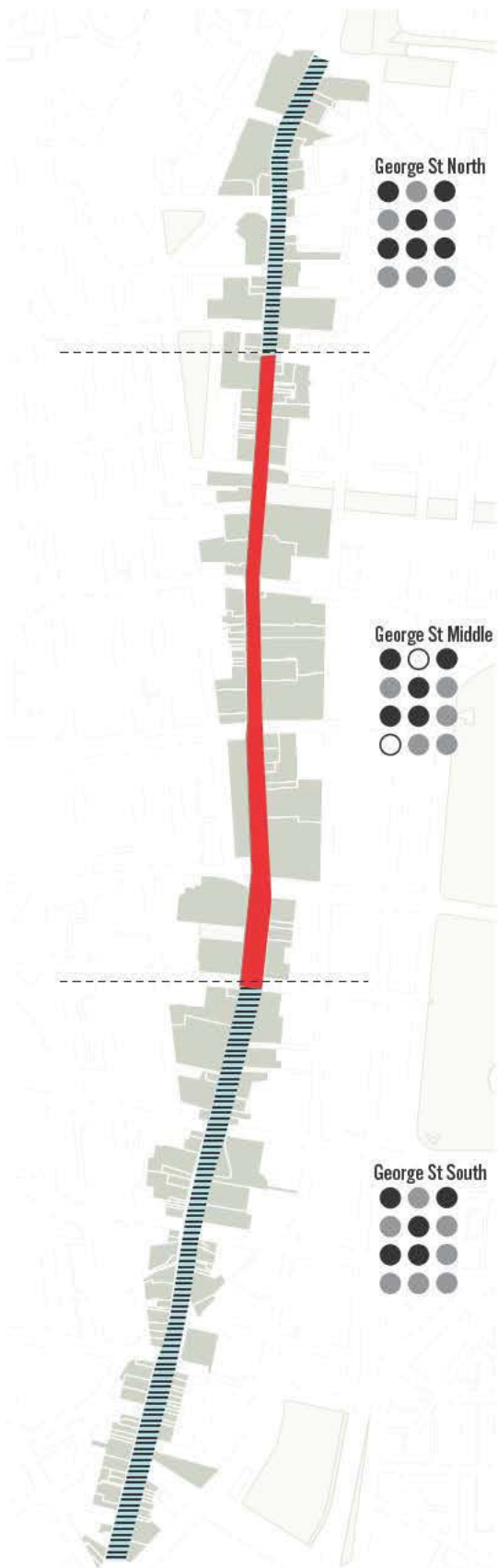
TWO EXAMPLES USING QUALITY CRITERIA TO EVALUATE CITY SPACE



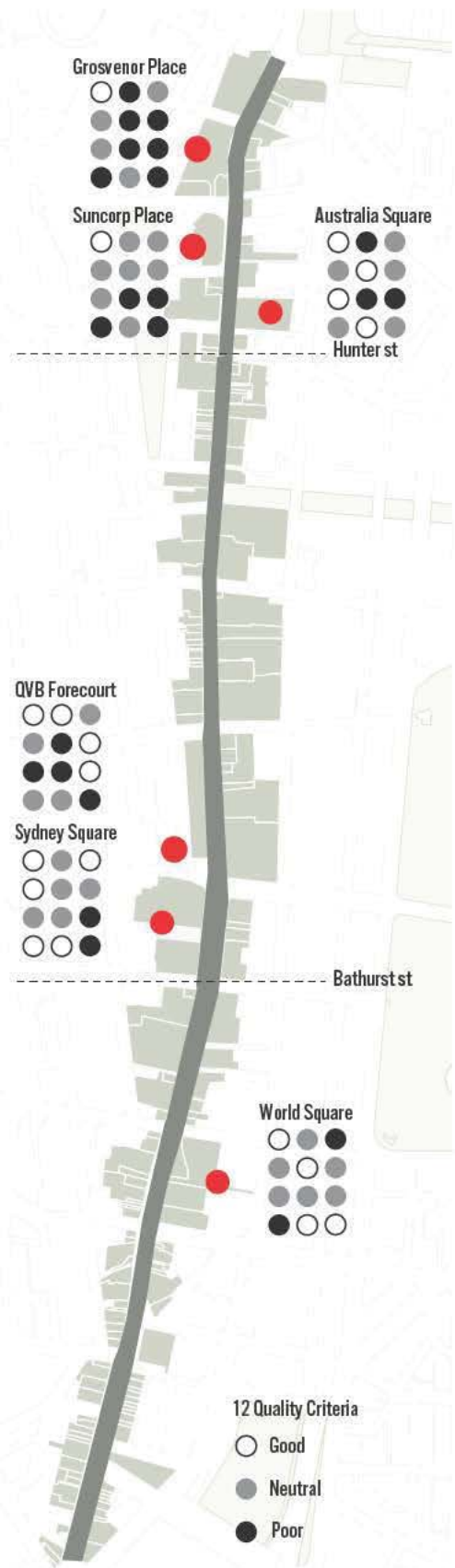
Quayside street in central Copenhagen. This example produces many white (good) fields due to the thoroughly good quality based on all criteria.



Main square in a new city district in Copenhagen. An example of a square with a very poor rating in most areas covered in the list of quality criteria.



ALONG GEORGE STREET



IN SPACES ALONG GEORGE STREET

12 Quality Criteria

- Good
- Neutral
- Poor

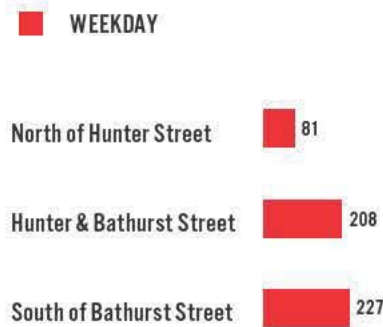


02 / STATIONARY ACTIVITY ALONG GEORGE STREET

Registration: 3:15-4:45pm
Wednesday, May 7, 2014

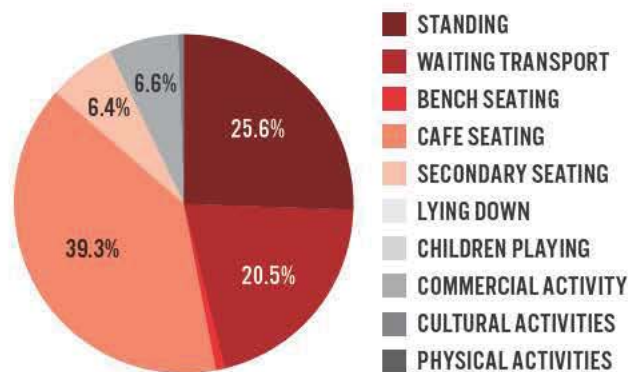
UPPER GEORGE STREET IS EMPTY AFTER WORKING HOURS AND DURING WEEKENDS

NUMBER OF PEOPLE ENGAGING IN STAYING ACTIVITIES ALONG GEORGE STREET



Despite high volumes of pedestrians along George Street, few are inclined to linger longer than necessary. Public seating opportunities are few and often of low quality, cafe seating is scarce, and nearly half of all recreational activity is standing or waiting for transport. It is not uncommon to see people crouching or leaning against walls for a moment of respite – there is latent demand for George Street to become a public space of its own.

TYPE OF ACTIVITY ALONG GEORGE STREET DURING A SUMMER DAY



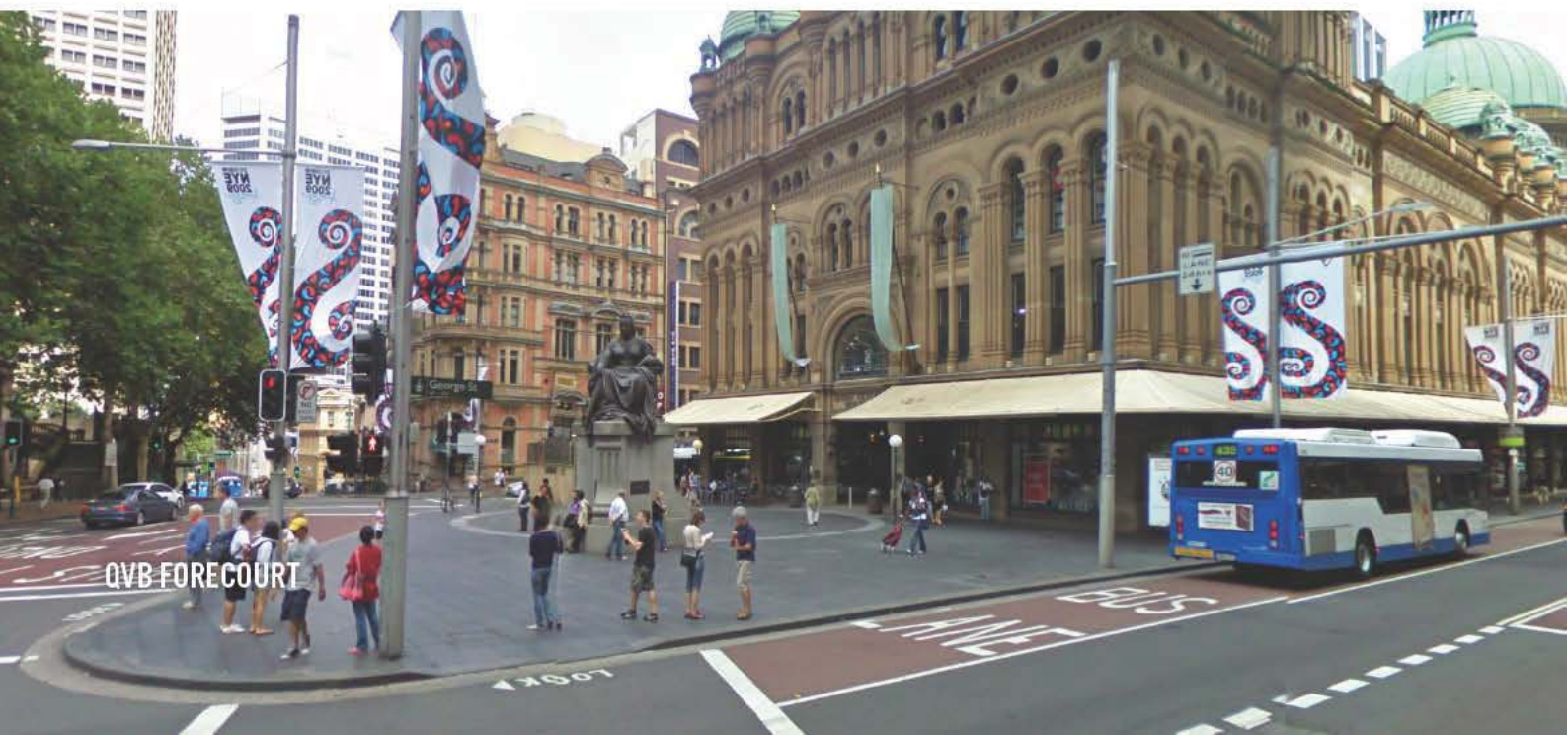
Source: Stationary Survey, May 7, 2014



GROSVENOR PLACE



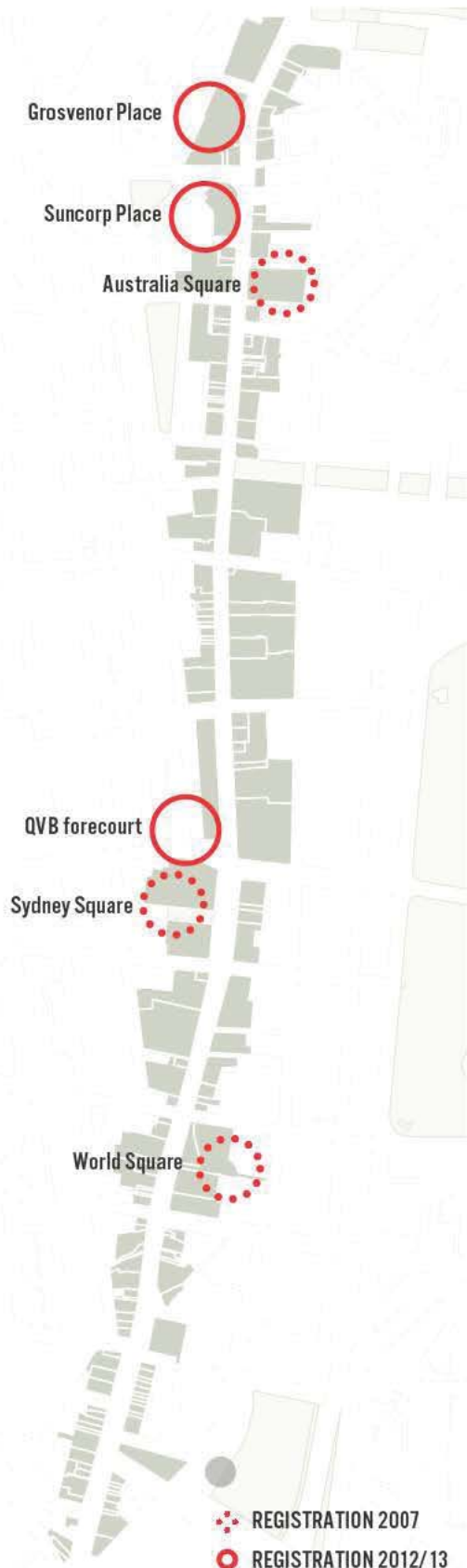
SUNCORP PLACE



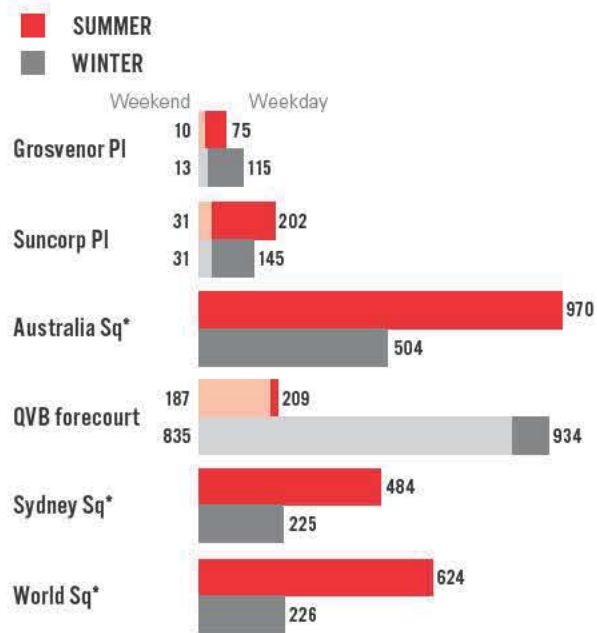
QVB FORECOURT

03 / STATIONARY ACTIVITY IN SPACES ALONG GEORGE STREET

Registration: 10.00am-06.00pm
 Wed, 13th. and Sat. 16th, March 2013
 Wed, 8th. and Sat. 18th, August 2012

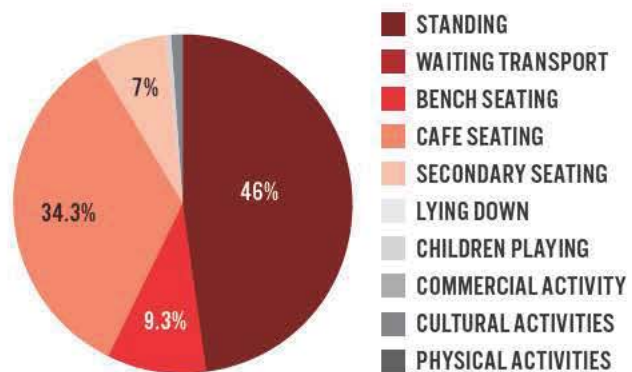


NUMBER OF PEOPLE ENGAGING IN STAYING ACTIVITIES AT PLACES ADJACENT TO GEORGE STREET



* Source: PSPL 2007, no weekend count

TYPE OF ACTIVITY AT SITES IMMEDIATELY ADJACENT TO GEORGE STREET DURING A SUMMER WEEKDAY



Source: Stationary Survey 2007 & 2012/13, City of Sydney

04/ PUBLIC AMENITIES AND BENCHES



34 BENCHES
12 KIOSKS
53 RUBBISH BINS
20 PHONE BOXES

THE LOW FREQUENCY OF PUBLIC AMENITIES AND ABSENCE OF PUBLIC BENCHES EXCLUDE USER GROUPS



One of the potential improvements that are likely to increase Sydney CBD usage amongst current CBD shoppers surveyed are amenities (increased number of public toilets). The qualitative research highlighted this as a key concern for parents of younger children alongside the limited number of kids activities in the city, e.g. playgrounds.

Source: Page 68, Perceptions of The City Retail Environment Ref No: 21029/30, May 2011 V2, Sweeney Research, City of Sydney

05/ COMMERCIAL OUTDOOR SEATING



Source: PSPL 2007

There are few restaurants and cafés along George Street today. The ones that are there have primarily no outdoor serving areas, but trade indoors.

Ground floor seating (indoor)	6817
Other levels seating (basement, 1st floor)	1976
Outdoor seating	254

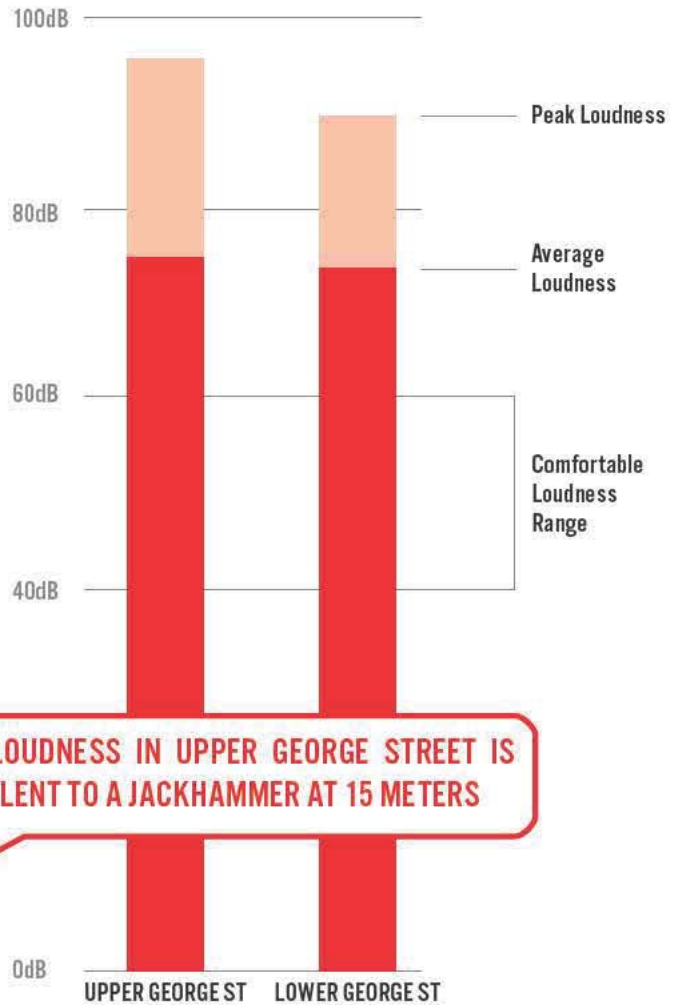
Source: City of Sydney

ONLY 3% OF ALL SEATING IN CAFÉS AND RESTAURANTS ON GEORGE STREET IS LOCATED OUTSIDE



320-330 George Street. City of Sydney

06 / NOISE LEVELS



PEAK LOUDNESS IN UPPER GEORGE STREET IS EQUIVALENT TO A JACKHAMMER AT 15 METERS

UPPER GEORGE ST LOWER GEORGE ST
Source: Noise Measurements, City of Sydney

Average noise levels along George Street currently stay around 75dB – approximately equivalent to loud singing at 1 meter. This volume makes George Street a difficult place for conversation and social interaction. Peak noise levels were recorded at 96dB, as loud as a jackhammer at 15 meters.



City of Sydney

07/ AIR QUALITY

Upper George Street
Air Quality registration



Mid George Street
Air Quality registration



Lower George Street
Air Quality registration



**AIR QUALITY SURVEY
TO BE UNDERTAKEN**

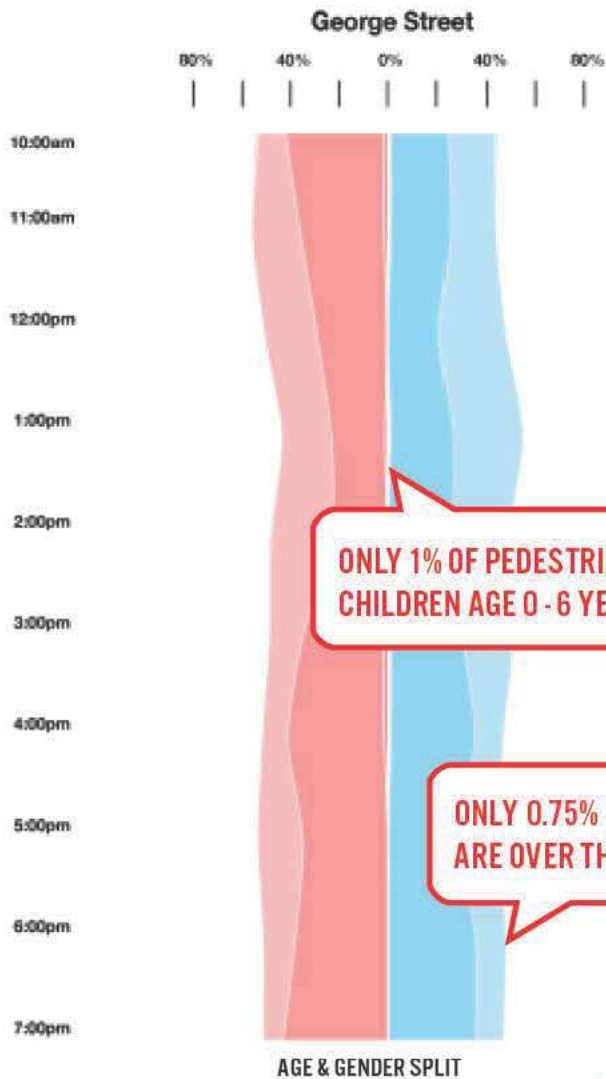


George Street from above

08/

AGE AND GENDER

Registration: 10.00am-19.00pm
March 2007



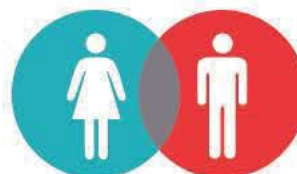
Source: PSPL 2007

While 2011 Australian census data indicates up to 9% of residents along certain stretches of George Street are over the age of 65, those numbers are not reflected in the demographics of those utilizing the street's public space. Children and elderly are in general not very well represented in George Street today. The walking environment is not of a high quality, there are very few resting opportunities, walking space is scarce and footpaths are over-crowded. All elements that deter families with children and the elderly to visit George Street.

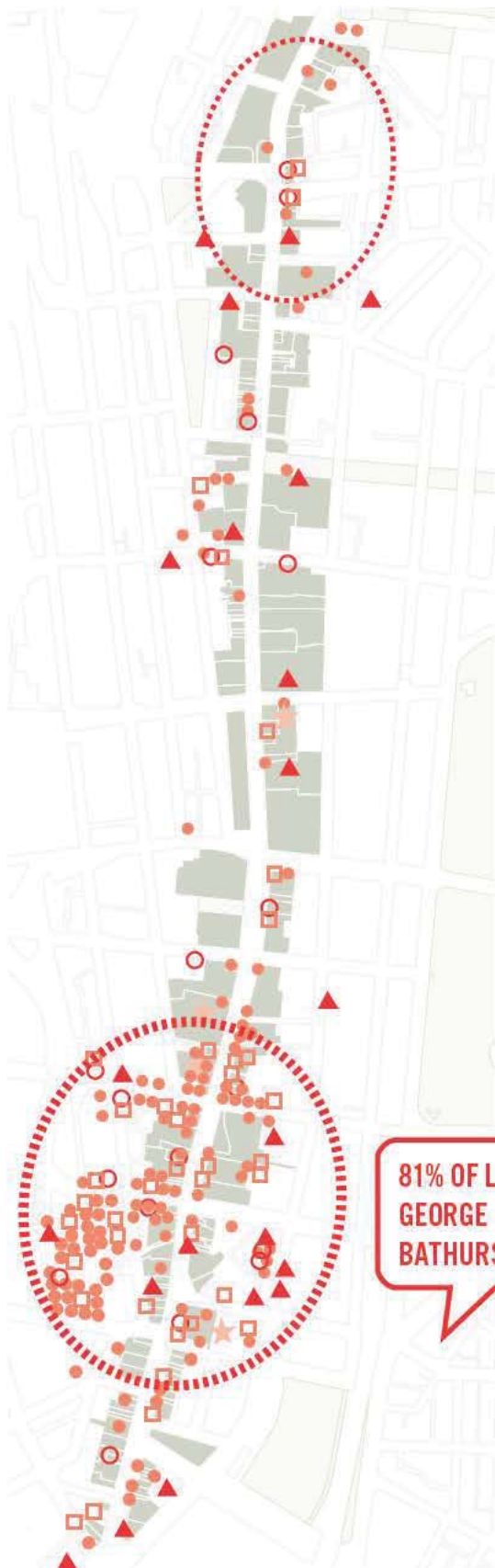
ONLY 1% OF PEDESTRIANS ON GEORGE STREET ARE CHILDREN AGE 0 - 6 YEARS

ONLY 0.75% OF PEDESTRIANS ON GEORGE STREET ARE OVER THE AGE OF 65

GENDER BALANCE ALONG GEORGE STREET IS VERY EQUAL, EVEN INTO THE EVENING HOURS



09/ NIGHTLIFE



The different characters along George St. becomes very present at night, when some parts close down and others bloom with eateries, small shops/kiosks, etc. Lower George Street – the entertainment district – is most active at night, and has the highest concentration of various functions open at night, both along the street itself and in the adjacent area. Meanwhile the central and northern part have few open functions through the late evening hours. Open functions have an impact on people’s sense of safety and are often vital in terms of creating invitations for people to spend time along the street at night. However, crime rates also influence people’s perceptions of the street. In recent years the perceptions of George Street are changing for the better, and the street has come into its own as one of the city’s hot spots for new food establishments.

Source: Gorgeous George, Sydney Morning Herald, 29.10.2013

81% OF LATE NIGHT ESTABLISHMENTS ALONG GEORGE STREET ARE LOCATED SOUTH OF BATHURST STREET

- EATERIES, RESTAURANTS, CAFÉS AND PUBS
- RETAIL, SHOPS, KIOSKS, STALLS
- 24H CONVENIENCE STORES
- ★ ENTERTAINMENT, THEATERS, CINEMAS, CLUBS
- △ ACCOMODATION, HOTELS, APARTMENTS

Source: Late Night Management Research Project 2011, City of Sydney

ECONOMICS

KEY PERFORMANCE INDICATORS

- INCREASED DIVERSITY OF USES IN BUILDINGS ALONG GEORGE STREET
- INCREASED NUMBER OF RESIDENTS IN THE CBD
- MORE CUSTOMERS ON GEORGE STREET
- DECREASE IN OFFICE VACANCY

IN 10 YEARS GEORGE STREET WILL BE A
THRIVING RETAIL LOCATION



GEORGETOWN
GUYANA

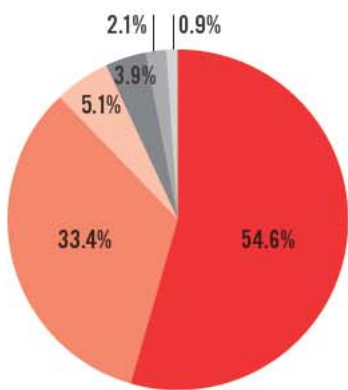
LIJIANG
CHINA

ART &
ABOUT

01/

BUSINESSES ALONG GEORGE STREET

TYPES OF BUSINESSES WITH GROUND FLOOR PRESENCE ALONG GEORGE STREET



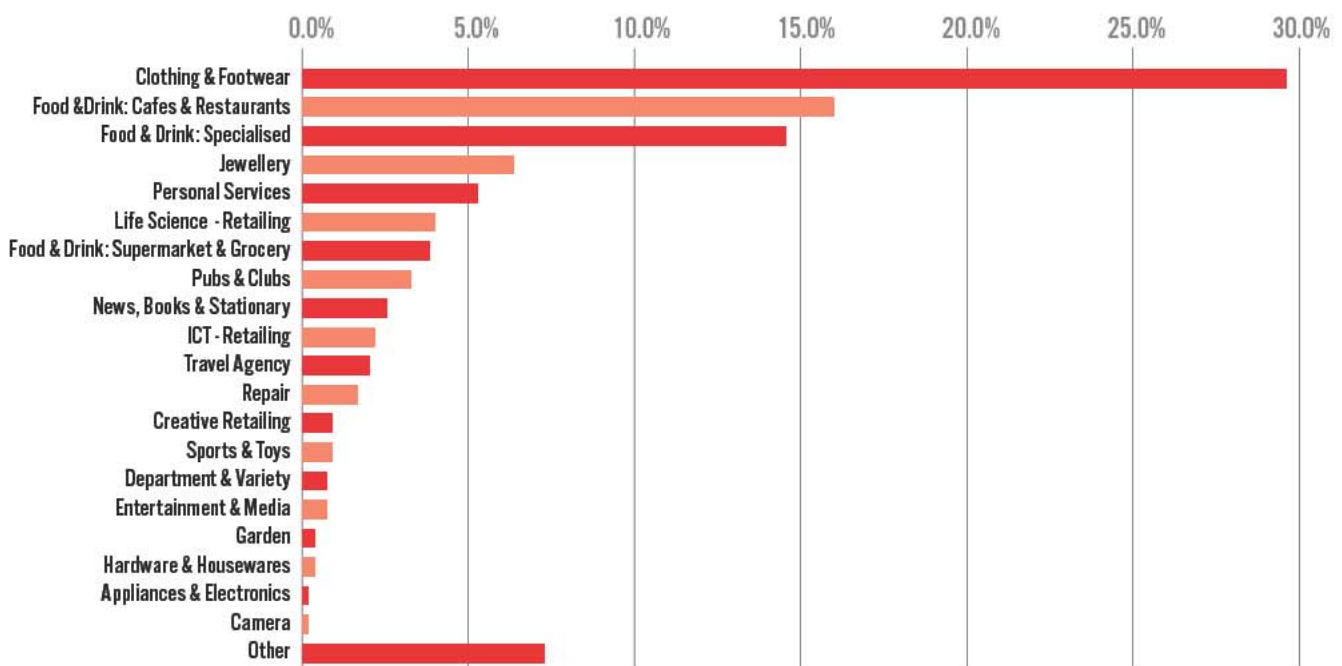
- RETAIL AND PERSONAL SERVICES
- FOOD & DRINK
- TOURIST, CULTURAL AND LEISURE
- LIFE SCIENCE (BIO-TECH)
- ICT
- CREATIVE INDUSTRIES

Source: Floor Space and Employment Survey 2012, City of Sydney

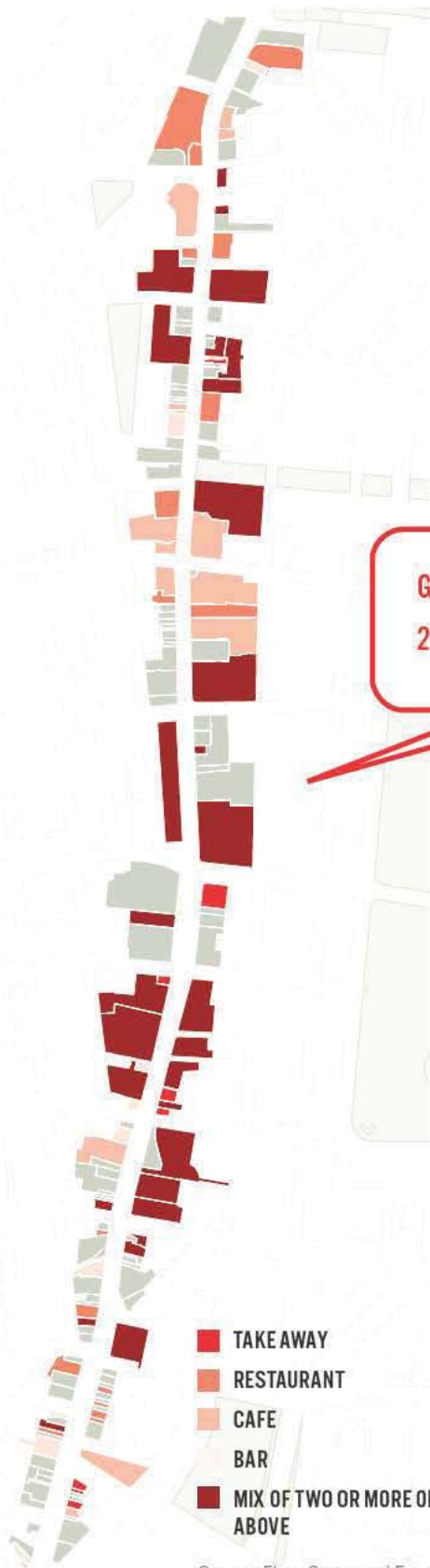
George Street has no shortage of diverse retail and food offerings, a major draw beyond employment and a service to the employees working in the area. These businesses attract and support public life along George Street. This diversity should be maintained as George Street continues to transform.

88% OF GROUND FLOOR BUSINESSES ON GEORGE STREET PROVIDE FOOD & DRINK, RETAIL, OR PERSONAL SERVICES.

GROUND FLOOR BUSINESSES IN DETAIL



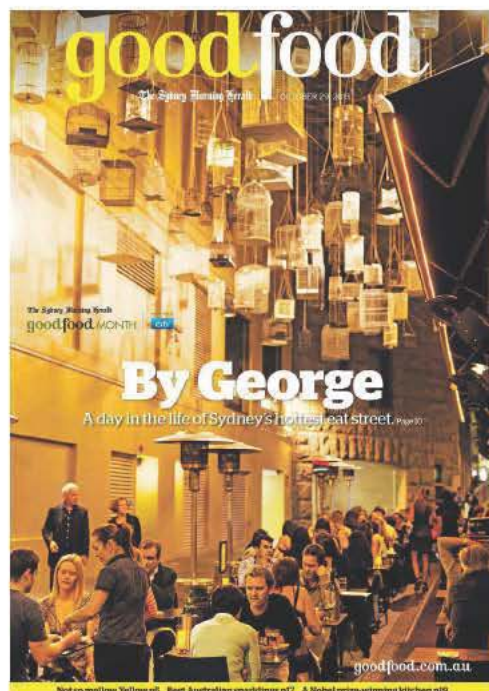
02 / FOOD BUSINESS



Source: Floor Space and Employment Survey 2012, City of Sydney

Amongst the most effective ways to invite public life is bountiful, accessible, and diverse food options. George Street provides this, but could improve opportunities to enjoy the arrange of food options beyond the establishments with outdoor seating and other public space amenities. Many foodplaces on George Street are mixed use - cafés, restaurants, and takeaways in one venue.

GEORGE STREET HAS 20+ LISTINGS IN THE 2014 GOOD FOOD GUIDE

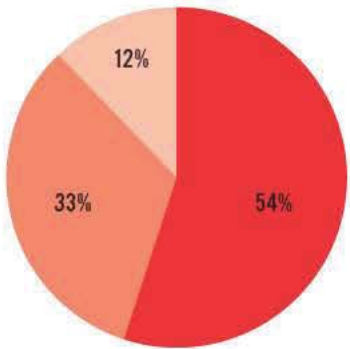


George Street is growing as a place for good food.

03/ RETAIL BUSINESS



GEORGE STREET HAS AN UNUSUALLY HIGH AMOUNT OF LOCAL BRANDS AND SMALL BUSINESSES COMPARED TO OTHER MAIN STREETS



- LOCAL BRANDS
- NATIONAL BRANDS
- INTERNATIONAL BRAND

Source: Page 51 City of Sydney Retail Survey
Savills Research & Consultancy, September 2012

LARGER MALLS ARE MAINLY LOCATED IN THE CENTRAL SECTION OF GEORGE STREET

- 1
- 2-7
- 8-20
- 21-40
- 41-60
- 61-80
- 81+

Source: City of Sydney
2030, Oct 8., 2013





LOCAL BRAND 54%
(CAFES, RESTAURANTS, BESPOKE CLOTHING ETC.)



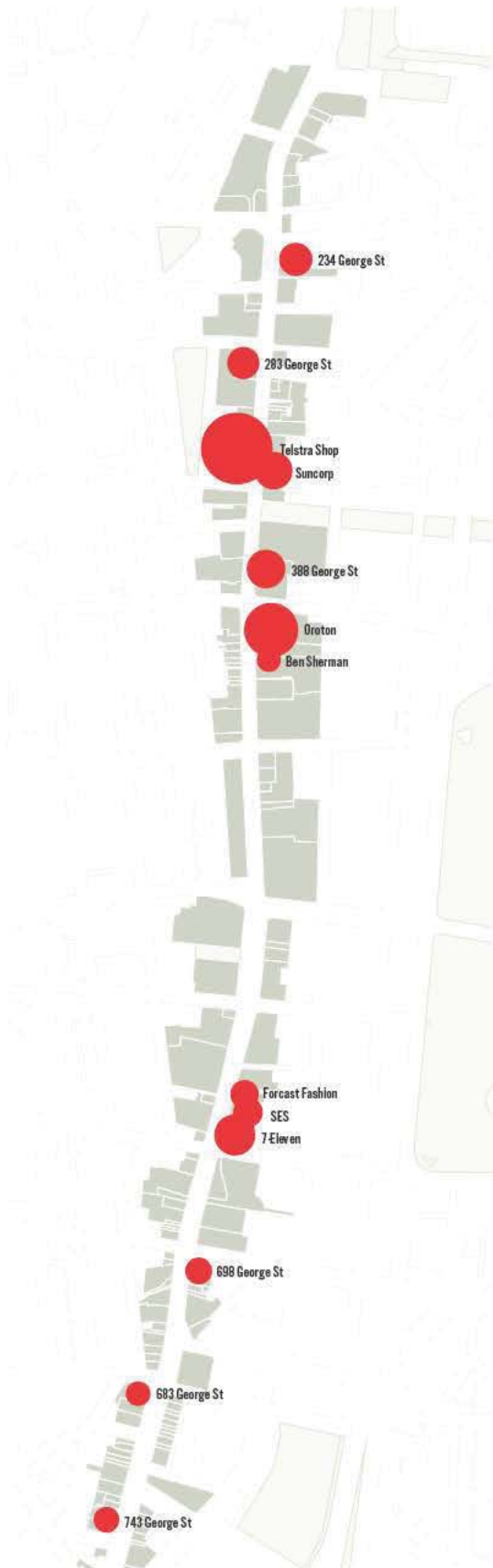
NATIONAL (33%)
(THOSE COMMONLY FOUND IN ALL MOST MAJOR CBD MARKETS IN AUSTRALIA.)



INTERNATIONAL (12%)
(GUCCI, BURBERRY, APPLE, FOSSIL, SAMSUNG ETC)

INTERNATIONAL LUXURY BRANDS HAVE AGGLOMERATED IN AND AROUND MARTIN PLACE AND PITT STREET MALL. THERE ARE ALSO A NUMBER OF INTERNATIONAL RETAILERS IN THE ROCKS PRECINCT, LOOKING TO CAPITALISE ON THE SHEER NUMBER OF TOURISTS THAT TRAVEL TO OR VIA CIRCULAR QUAY ON A DAILY BASIS.

04/ COMMERCIAL RENTS



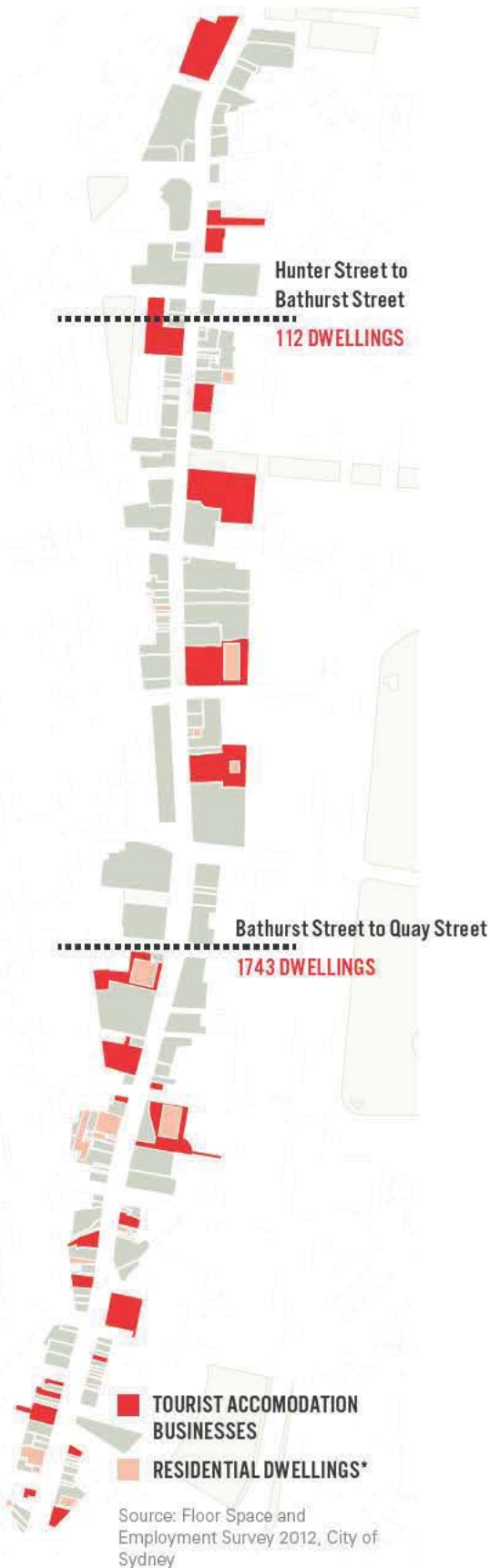
RENTS ON GEORGE STREET TEND TO BE SLIGHTLY HIGHER AROUND MARTIN PLACE

RECENT LEASES STIPULATE THAT RENTS WILL INCREASE BY 4 PERCENT PER ANNUM IN LINE WITH COMMERCIAL LEASES FOR OFFICE SPACES.

LOCATION	ANNUAL RENT/ M2
234 GEORGE STREET	\$2970
283 GEORGE STREET	\$2790
TELSTRA SHOP SUNCORP	\$14444
388 GEORGE STREET	\$4050
OROTON BEN SHERMAN	\$8134
FORCAST FASHION SES 7-ELEVEN	\$2159
698 GEORGE STREET	\$2344
7-ELEVEN	\$4606
683 GEORGE STREET	\$1900
743 GEORGE STREET	\$1590
	\$1740

Source: page 53 City of Sydney Retail Survey
Savills Research & Consultancy, September 2012
& <http://www.realcommercial.com.au>, 2014

05/ RESIDENTIAL DEVELOPMENT



RESIDENTS IN CBD

- Population 2007: 21.950,
- Population 2012: 24.982 (+13.8%)
- Number of dwellings in 2007: 11.611
- Number of dwellings in 2012: 11.865 (+2.2%)
- Population densities between Bathurst Street and Goulburn Street along George Street are among the highest in Sydney at approximately 500 persons per hectare.

Source: CBD Precinct Summary Report 2012; City of Sydney Floor Space and Employment Survey 2012, City of Sydney

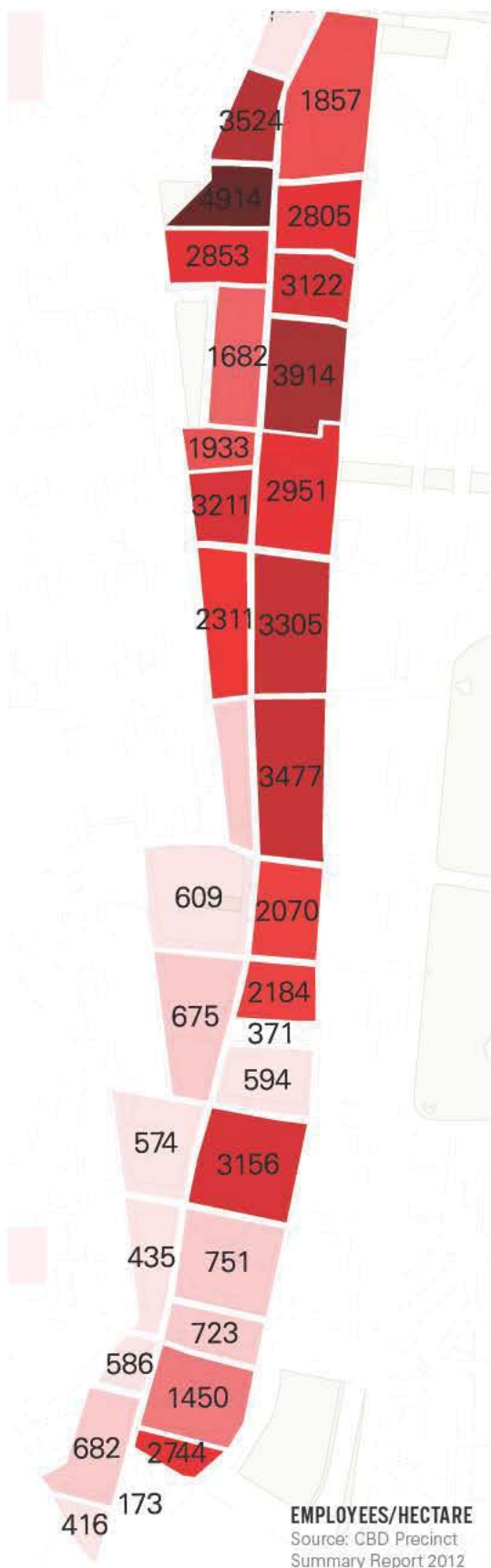
Australian Bureau of Statistics, Census of Population and Housing, 2011 (Enumerated data). Compiled and presented in atlas.id by .id, the population experts.

THERE IS A HIGHER CONCENTRATION OF DWELLINGS IN LOWER GEORGE STREET



Residents in the CBD are growing in numbers

06/ EMPLOYMENT



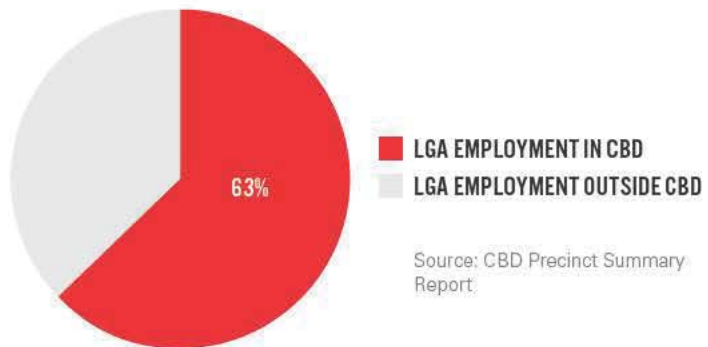
George Street and by extension the surrounding Sydney CBD area is a major employment center – an estimated 63% of the Sydney Local Government Area (LGA) is employed in the CBD, approximately 277,000 workers. This total represents a 5.5% increase since 2012, or 14,400 additional CBD workers. Approximately a third of the CBD – 95,000 people – are employed along George Street. Most of these people leave the CBD after work – the Australian census estimates only 9,000 workers stay along and around George Street at night.

Source: CBD Precinct Summary Report 2012: City of Sydney Floor Space and Employment Survey.

Australian Bureau of Statistics, Census of Population and Housing, 2011 (Enumerated data). Compiled and presented in atlas.id by .id, the population experts.

APPROXIMATELY 95,000 PEOPLE ARE EMPLOYED ALONG GEORGE STREET

PERCENT SYDNEY LGA EMPLOYMENT IN CBD



Source: CBD Precinct Summary Report

CONCLUSION

George Street's transformation signals the opportunity for a change not only in the efficiency, quality, and provision of space for people along its corridor, but for Sydney's culture of public life at large. A George Street that invites people to pass time amidst an enjoyable environment will improve the quality of life for residents, workers, and visitors alike.

Today, George Street struggles to effectively serve this purpose, but it is a place of potential. Despite the difficulty in meeting high demand as a transit corridor or providing generous public space, a variety of redeeming qualities – its placement amidst attractions, a diverse array of retail offerings, the energy of the business and entertainment districts, and a rich history as Sydney's iconic street – indicates immense opportunity.

As change moves forward it will be crucial to consider public life as the focal point of development. The metrics outlined in this document provide key performance indicators in line with this goal;
A George Street for people and one where business and retail can thrive.

DATA COLLECTION SOURCES

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03 / Perceptions of George Street
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November 2007
Environmetrics • City of Sydney

05 / 3 Different Characters
P. 4 Perceptions of The City Retail Environment
Ref No. 21029/30 • May 2011 • V2
Sweeney Research • City of Sydney
&
Late Night Management Areas research project
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06 / Ground Floor Activity
07 / Heritage Buildings
08 / Building Heights
11 / Public Art
Sydney PSPL 2007
Gehl Architects • City of Sydney

09 / Street Trees
CBD AutoCAD map
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Mobility

02 / Modal Counts
06 / Space Allocation
Pedestrian & Traffic Count
May 23rd, 2012
Skyhigh - The Traffic Survey Company
• City of Sydney

03 / Pedestrian Network
04 / George Street Pedestrian Volume Patterns
05 / Cross Street Pedestrian Volume Patterns
Pedestrian & Traffic Count
December 4th & 8th, 2012
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07 / A Crowded Street
08 / Waiting time at crossings
Pedestrian & Traffic Count
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TCS Instruments • City of Sydney

09/ Pedestrian Injuries
City of Sydney, RMS Crash Data 2008-1012

11/ Driveway Counts
George St Driveway Counts
February 2013
R.O.A.R. Data

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02 + 03 / Stationary Activity
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04 / Public Amenities and Benches
Public Toilet Strategy 2014
City of Sydney
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P. 69 Perceptions of The City Retail Environment
Ref No. 21029/30 • May 2011 • V2
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05 / Commercial Outdoor Seating
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06 / Noise Levels
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08 / Age and Gender
PSPL 2012/2013
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09 / Nightlife

p. 39 Late Night Management Areas Research Project
October 2011
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03 / Retail Business
p. 51 City of Sydney Retail Survey
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04 / Commercial Rents
p. 53 City of Sydney Retail Survey
September 2012
Savills Research & Consultancy

05/ Residential Development
George Street Benchmarking: Residential Dwellings
September, 2013
City of Sydney