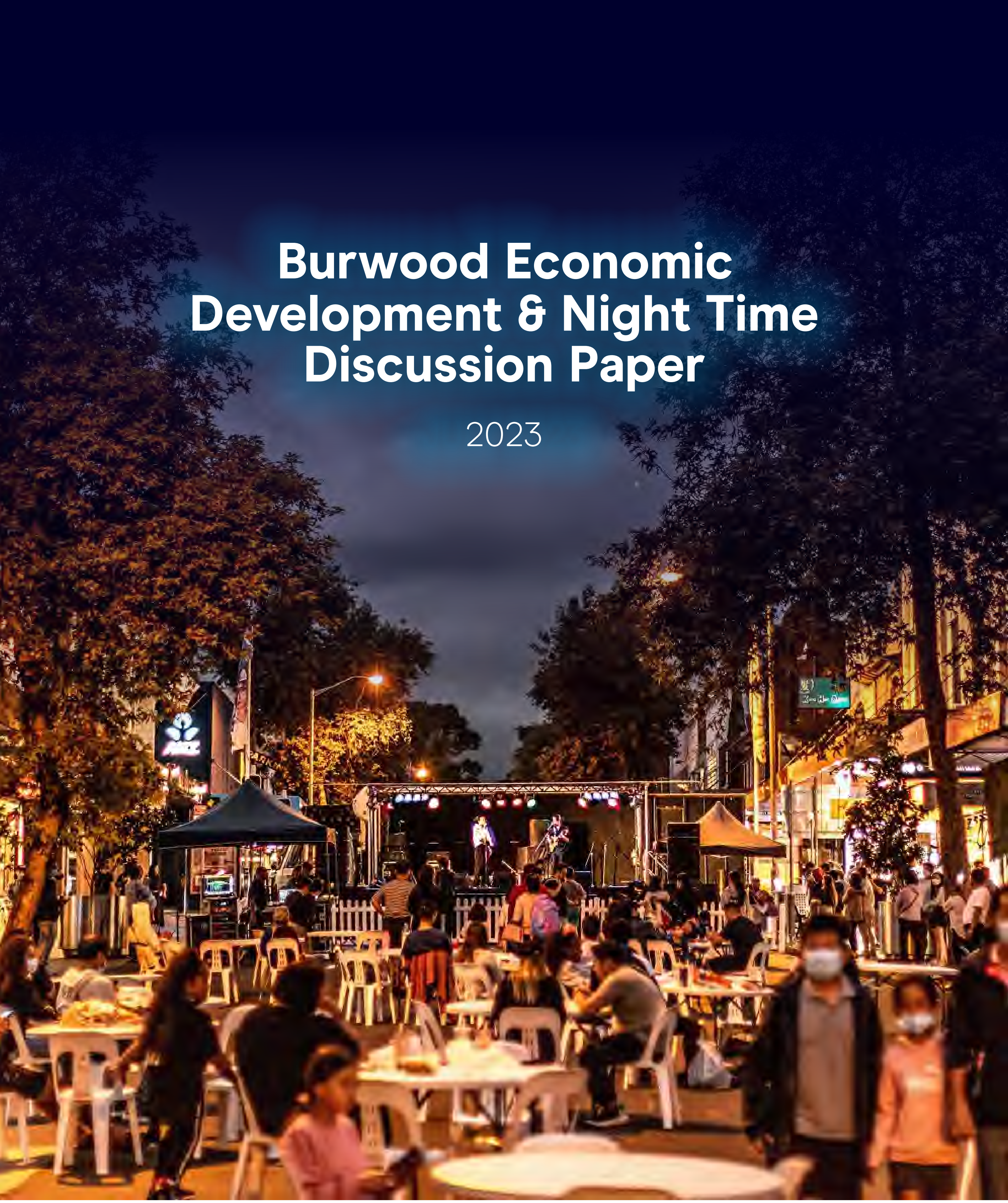
Burwood Economic Development & Night Time Discussion Paper

2023



Burwood Inc.1874

Burwood . Burwood Heights . Croydon . Croydon Park . Enfield . Strathfield

Acknowledgment of Country

Burwood Council acknowledges the Wangal Clan of the Eora Nation, the traditional custodians of the lands in which the Burwood Local Government Area is located.

We pay our respects to their elders past, present and emerging. We acknowledge and respect their cultural heritage, beliefs and ongoing relationship with the land.

Contents

> Cities benefit from having a 24-hour economic system, from a social, cultural, and economic perspective. If 70% of people by 2050 will live in urban areas, we need to rethink the way we use the urban space, and the public space.

Mirik Milan, Amsterdam Night Mayor

Executive summary

The Burwood Local Government Area (LGA) is undergoing a significant transformation, with the Burwood Town Centre emerging as a crucial hub for housing, employment, retail, and dining experiences. In recognition of this potential, Burwood Council has developed the Burwood Economic Development Discussion Paper. The aim of this paper is to pave the way for a vibrant, diverse, and safe night time economy in Burwood, positioning it as a regional destination within Greater Sydney.

Over the past decade, Burwood has experienced substantial growth in both residential and employment sectors, benefitting from its strategic location between Sydney's two CBDs. As a result, Burwood has cultivated a vibrant and multicultural night time economy that is out-competing other centres across Sydney. However, it is crucial to strike a balance between residential amenity and commercial growth in the town centre, considering the anticipated population growth of the Burwood LGA, projected to double by 2041 to approximately 58,178 people.

This discussion paper identifies opportunities for Burwood's future Economic Development Strategy, addressing economic challenges and capitalising on opportunities. This document will set the scene for future community and stakeholder engagement, and the development of a comprehensive and place-specific "Burwood After Dark" strategy, along with an implementation plan. This strategy seeks to stimulate activity, employment, and investment, while effectively promoting the Burwood Town Centre, major precincts, and local businesses.

Additionally, the paper will support planning initiatives that facilitate the growth of the night time economy, making it easier for businesses to respond to new opportunities and for pop-up activities to flourish. The implementation plan developed through this project will enable the Burwood Council to actively stimulate economic activity, particularly after dark, creating a thriving night time economy in Burwood.

The Burwood Economic Development Discussion Paper is an important milestone in Burwood's journey towards establishing itself as a vibrant regional destination within Greater Sydney. By embracing the opportunities presented by the night time economy, Burwood aims to enhance economic growth, foster employment opportunities, and promote the unique offerings of its town centre. With its strategic location, active community, and commitment to balanced development, Burwood is poised to thrive in the evolving landscape of the night time economy.

Introduction

Purpose of this paper

The purpose of this Discussion Paper is to initiate a conversation around the ongoing evolution of the local economy within the Burwood Town Centre and Burwood North, with a focus on capitalising on Burwood's growing night time economy. Over the past decade, Burwood has become known as a vibrant hub of activity, particularly in terms of late-night venues. Council has recognised the significant potential of the centre, and our strategic framework continues to identify opportunities for growth and development. The ultimate goal is to establish Burwood as a unique destination in its own right within the broader Greater Sydney Neon Grid.

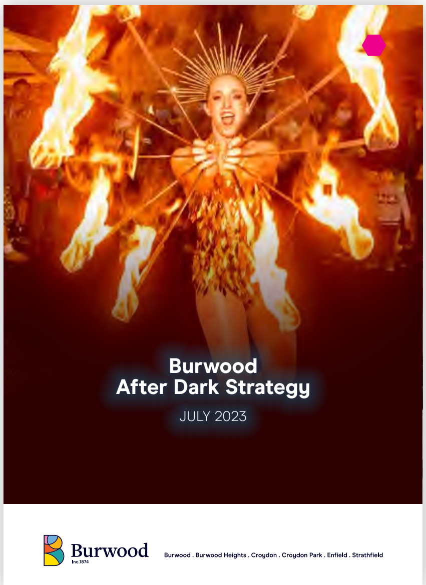
The Discussion Paper will serve as a roadmap to guide decision-making on how to capitalise and benefit from the various market forces and demographic shifts that are currently taking place in the centre. By providing feedback, stakeholders can help Council to develop a comprehensive After Dark Strategy that addresses all aspects of the Burwood's Night Time Economy, from safety and security to economic growth and social vibrancy.

Our approach

This Discussion Paper will form the basis for engagement with the Burwood Community and key stakeholders across the Town Centre and Greater Sydney. The feedback received from these engagement sessions has been used to develop an After Dark Strategy to direct the future Night Time Economy of the Burwood Town Centre. Subsequently, a Visitation & Investment Prospectus will be prepared to market Burwood as a dynamic destination for business, entertainment and recreation. This paper will also test a broader economic development vision & road-map, underpinned by our community's aspirations around building economic resilience.

Discussion Paper

Engagement with stakeholders & community



After Dark Strategy (+ Visitation & Future Investment Prospectus)

Study area

The study area for this Discussion Paper relates to the boundaries defined in the Burwood Development Control Plan 2012, being the Burwood Town Centre and Burwood North. These boundaries have been identified in Figure 1 below. For this discussion paper, the 'Burwood Town Centre' relates to both the Burwood Town Centre and Burwood North.

Over the past decade, the Burwood Town Centre has experienced substantial growth and has become a vibrant, multicultural nightlife destination, out-competing established night time precincts across Sydney.

As new waves of development occur through the town centre, and in particular adjoining the upcoming Burwood Metro Station, it is critical the night time economy remains a core consideration of the area.

Figure 1: Study Boundaries
Source: Nearmaps (2023) and Burwood DCP 2012

Snapshot of Burwood

Burwood is home to a growing, young population with a notable proportion of students and tertiary qualifications. The LGA is characterised by a high level of cultural diversity – over 1 in 2 residents were born overseas, and nearly 2 in 3 residents speak a language other than English at home.

ECONOMICS

Finances

$1,867 Household income
$500 Median weekly rent
$2,500 Median monthly mortgage repayments

Employed %

48.2% Work full-time
32.3% Work part-time
7.1% Unemployed

Top industry sectors %

14.6% Healthcare and Social Assistance
11.1% Professional, Scientific and Technical Services
9.3% Retail Trade

$2.83b Gross Regional Product (2021)

15.5% Live and work in the area (2016)

37.8% University qualification (Bachelor Degree or higher)

PEOPLE

People
40,397

Median age
34 years

Population density
5,651 people per km²

Gender
49% male
51% female

People with Disability 5.1%

Life stages %

3.8% (0–4) Babies and pre-schoolers
5.6% (5–11) Primary schoolers
5.1% (12–17) Secondary schoolers
14.5% (18–24) Tertiary education and independents
21.9% (25–34) Young workforce
18.1% (35–49) Parents and homebuilders
10.9% (50–59) Older workers and pre-retirees
8.9% (60–69) Empty nesters and retirees
8.4% (70–84) Seniors
2.9% (85 and over) Elderly aged

57.7% were born overseas

18.1% China
7.6% Nepal
3.1% India
2.7% Vietnam

Aboriginal and Torres Strait Islander people 0.4%

62.9% Language other than English spoken at home

19.9% Mandarin
8.2% Cantonese
7.3% Nepali
3.5% Arabic

All data is ABS 2021 Census data unless stated otherwise
Sources: ABS, 2021 and ProfileID, 2021

A total of 14,817 families call Burwood home, with many living in the dominant dwelling type of medium to high density houses (65.7%). Burwood's population is projected to grow by 17,781 (44%) between 2021 and 2041. This reflects more than double the projected population increase for New South Wales over the same period (21%). Migration in and out of Burwood is primarily from the nearby LGAs of Bayside, Parramatta, Liverpool, and Cumberland.

Housing

Private dwellings 16,168

Dwelling type 65.7% of dwellings are medium to high density

Tenure type %

25.4%	Fully Owned
21.6%	Mortgage
45.4%	Renting

Vehicle ownership %

22.5%	No vehicle
41%	1 vehicle
21.6%	2 vehicles
8.9%	3 or more vehicles

Families 14,817

Family composition

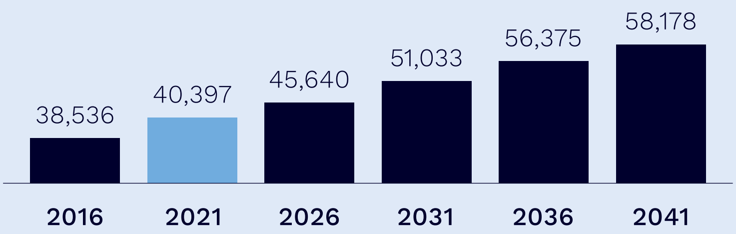
27.4%	Couples with children
24%	Couples without children
9.4%	One parent families

Household size %

22.7%	1 person
31.4%	2 persons
19.7%	3 persons
16%	4 persons
6.2%	5 persons
3.9%	6 or more persons

People

Burwood Population Forecast



Local in migration

35,243	Bayside
16,308	Cumberland
14,079	Parramatta
11,371	Liverpool

Local out migration

37,596	Bayside
22,261	Parramatta
20,737	Liverpool
17,529	Cumberland

All data is ABS 2021 Census data unless stated otherwise
Sources: ABS, 2021 and ProfileID, 2021

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Employment snapshot

As of 2021, the Burwood LGA had a total of 17,649 employed local residents. Analysing employment within the total employment base of the LGA indicates nearly 40% of current employed persons who reside within the LGA directly or indirectly intersect with the night time economy (see figure below).

Our city's economic profile indicates a high proportion of workers are employed within night time economy (NTE) linked industries. Accordingly, encouraging expansion of the night time economy would therefore directly impact local employment growth within the Burwood LGA.

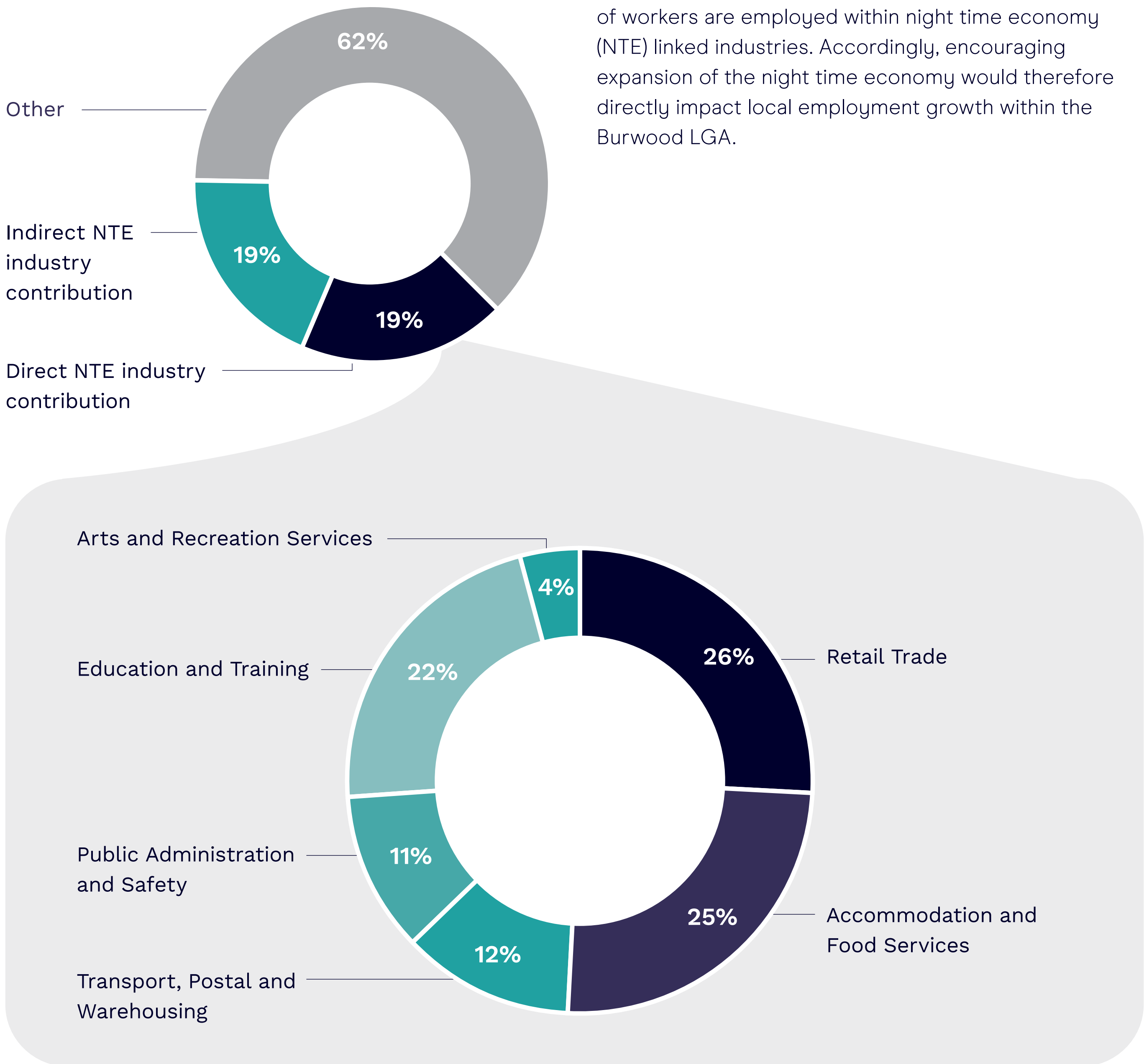


Figure 2: Employed Residents in the Burwood LGA
Source: Australian Bureau of Statistics, 2021

Detailed Breakdown

Analysing employment for 2021 at the ANZSIC 3-Digit level for a detailed breakdown of employment sectors reveals that Cafés, Restaurants and Takeaway Food Services dominates the majority of NTE linked employment in the Burwood LGA.

Figure 3: Breakdown of Night Time Linked Industries

Industry (ANZIC 3-Digit)	Burwood Suburb		Burwood LGA	
	Total (#)	Total (%)	Total (#)	Total (%)
Cafés, Restaurants and Takeaway Food Services	704	48%	1273	45%
Food and Beverage Services nfd	51	3%	81	3%
Pubs, Taverns and Bars	66	4%	112	4%
Clubs (Hospitality)	35	2%	88	3%
Accommodation	76	5%	147	5%
Accommodation and Food Services nfd	3	0%	3	0%
Gambling Activities	58	4%	89	3%
Sports and Physical Recreation Activities	17	1%	44	2%
Fuel Retailing	21	1%	41	1%
Food Retailing nfd	9	1%	17	1%
Supermarket and Grocery Stores	234	16%	511	18%
Specialised Food Retailing	97	7%	193	7%
Other Personal Services	36	2%	79	3%
Arts and Recreation Services nfd	7	0%	10	0%
Heritage Activities, nfd	0	0%	0	0%
Museum Operation	6	0%	8	0%
Parks and Gardens Operations	4	0%	11	0%
Creative and Performing Arts Activities	11	1%	44	2%
Sports and Recreation Activities nfd	0	0%	5	0%
Horse and Dog Racing Activities	0	0%	3	0%
Amusement and Other Recreation Activities	11	1%	17	1%
Retail Trade nfd	37	3%	62	2%
Total	**1475**	**100%**	**2827**	**100%**

39% of participants visit Burwood Town Centre weekly, commonly for dining, retail, entertainment, and social activities.

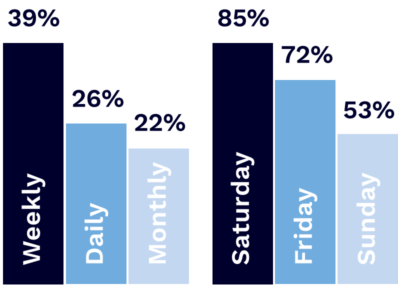
How do we participate after dark?

The following graphic summarises outputs from the Burwood After Dark Strategy survey undertaken in late 2022.

Broadly, participation in the Burwood Night Time Economy is strong – 39% of participants visit Burwood Town Centre weekly, commonly for dining, retail, entertainment, and social activities. Satisfaction is also high, with the majority (61%) of participants at least somewhat satisfied with Burwood's current night time offerings. Burwood Chinatown is a popular LGA-wide destination, and participants favoured diversity of offerings, safety, and temporary activations as priority opportunities for Burwood's nightlife.

Participation

Visitation



37% 5pm–8pm

51% 5pm–12am

'Chinatown' mentioned in 40% of the responses as a favourite night time destination

Activities

89% Dining

46% Retail

40% Entertainment

39% Social

Opportunities

Burwood Park
e.g. night markets, outdoor cinema, community sports

Burwood Road
e.g. traffic control, pedestrianised, parking

Burwood Town Centre
e.g. English signage, street lighting, diverse food offerings

Priorities

Diversity of things to do

Personal safety

Pop-ups/ temporary uses

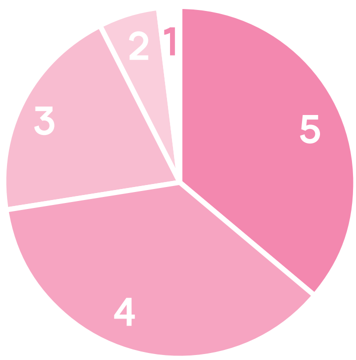
Satisfaction

61% Satisfied or very satisfied

34% Neutral

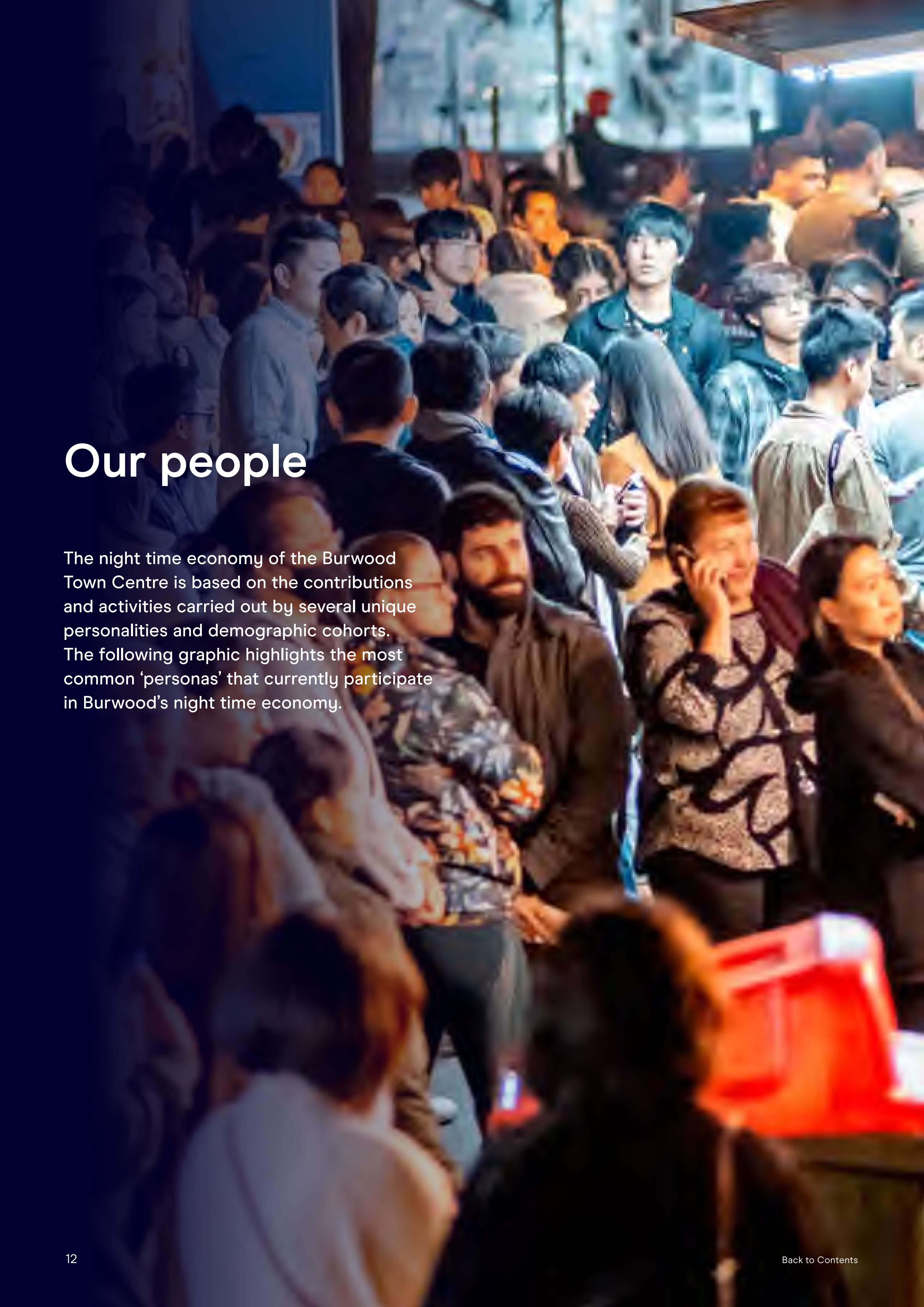
6% Dissatisfied or very dissatisfied

Safety



73% Feel somewhat safe (4 or 5/5 rating)

Source: Burwood After Dark Strategy Survey 2022



Our people

The night time economy of the Burwood Town Centre is based on the contributions and activities carried out by several unique personalities and demographic cohorts. The following graphic highlights the most common 'personas' that currently participate in Burwood's night time economy.

Persona	Service Group	Rationale	Needs
Young migrant family	Parents and homebuilders	Families and newcomers are a key consideration of the night time economy to create inclusive and family-friendly spaces for all.	• Family-friendly activities in Burwood Town Centre • Access to social support and local services beyond typical business hours
International students	Young workforce and tertiary education independents	Younger residents are a key target of the night time economy, especially those employed and able to finance their night time endeavours.	• Access to education and training opportunities • Night time activities in the town centre • Housing affordability and access to quality open space
Late-shift workers	Essential workers	Residents employed in healthcare, hospitality, and cultural industries are likely to work late-night shifts and are an important demographic to plan for.	• Frequent transport services • Access to social support and local services beyond typical business hours
Shoppers	All	Residents of all ages and demographics contribute to local business and retail, particularly into the night as some establishments continue to trade.	• Access to retail and local services beyond typical business hours • Frequent transport services
Tourists	International and domestic tourists and visiting family relatives	Independent travellers and visiting friends and relatives (VFR) are a substantial type of traveler with unique needs to participate in a city's nightlife.	• Off-the-beaten path places and activities • Night time activities in the town centre • Access to information on 'what's on'

Drivers of change

The Burwood Town Centre and Burwood North are subject to a number of external factors that are driving and shaping trends and demand. These drivers present an immense opportunity for Council to capitalise on our existing strengths and deliver lasting changes that shape the way residents and visitors use the Burwood Town Centre after dark. The key drivers of change have been listed below, with opportunities identified.

High population growth

The Burwood LGA has previously experienced and is forecasted to receive substantial population growth. As outlined in previous sections, the Burwood LGA population is projected to grow by 17,781 (44%)[1] in the 20 years between 2021 and 2041. This reflects more than double the projected population increase for New South Wales over the same period (21%)[2].

This population growth is largely driven by overseas arrivals and migrants into Sydney, which make up over half (57.5%) of the entire LGA's population[3]. Of those overseas arrivals, 33% arrived between 2016 to 2021 showing a recent surge of overseas arrivals[4]. These new overseas arrivals tend to be younger, with 12% of the total population of the Burwood LGA made up of international students between the ages of 18 to 34. This growing cohort of an increasingly diverse and young population[5] will drive demand for different retail and service offerings.

OPPORTUNITY: Introduction of new retail models and businesses to capture this growing cohort of culturally diverse young adults, uniquely concentrated in one area.

Retail floorspace demand

The Burwood Town Centre is one of the largest retail centres in the surrounding area, with approximately 85,902m^2 of floor space[6]. Based on current trends, it is forecasted that there will be demand for an additional 52,780m2 of floor space by 2036, or a 61% increase on the current retail floor area[7]. It is anticipated this retail floorspace will be provided through the redevelopment of a number of key sites within the town centre, which will feature mixed use ground floor retail with residential units above[8].

OPPORTUNITY: To leverage and dedicate spaces for new night time economy anchor uses, such as a large entertainment venue or late night hub.

1 *Burwood Community Snapshot, Burwood Council, 2023.*
2 *Burwood Council Community Profile, ProfileID, 2023.*
3 *Census 2021, Australian Bureau of Statistics, 2021*
4 *Census 2021, Australian Bureau of Statistics, 2021.*
5 *Census 2021, Australian Bureau of Statistics, 2021*
6 *Local Employment and Investment Strategy, SGS Economics, 2020*
7 *ibid.*
8 *ibid.*

Urban renewal

The combination of both high population growth and strong demand for floor space will likely result in the continued urban renewal and redevelopment of the Burwood Town Centre. To accommodate this growth, Council is forecasting the construction of 6,989 additional dwellings by 2036 compared to 2016[9]. Redevelopment of sites, particularly those with prominent locations along Burwood Road will allow for Council to address existing legacy issues with the public domain, including safety, wayfinding and activation of the ground floor.

OPPORTUNITY: Fix legacy public domain issues within the town centre that impact the night time economy as sites are redeveloped in key locations.

Local focus

The COVID-19 Pandemic has fundamentally changed our relationship with the city, high streets and public space. With more people working from home and working on flexible arrangements, an increased demand for local services has been observed across Greater Sydney. In an analysis undertaken by the Greater Sydney Commission, it was identified that on average there was a 12% increase in spending across local centres in June 2020 compared to before the pandemic. This localised focus has meant that more people than before are looking to spend in local centres, rather than the city centre.

OPPORTUNITY: Leverage the changing consumer patterns to encourage more activity, and capture spending locally.

9 *Burwood Local Housing Strategy, SGS Economics (2020)*
10 *Burwood Local Housing Strategy (2020)*
11 *Burwood Local Housing Strategy (2020)*
12 *City Shaping Impacts of COVID-19, Greater Sydney Commission (2020)*
13 *InvestmentNSW (2020) – Greater Sydney 24 Hour Economy Strategy*

Destination qualities

The Burwood Town Centre has a growing reputation as a food and dining destination, that is rivalling established areas such as Chinatown Haymarket in the Sydney CBD, and upcoming markets such as the Parramatta City Centre. The current sentiment towards the town centre was tested in the community consultation sessions, and feedback shows that the Burwood Town Centre is seen to have an authenticity to its food offerings compared to similar centres across Sydney.

OPPORTUNITY: Diversify the offering of the town centre that leverages the existing crowd and reputation, and continues to grow the space.

Public transport

The Burwood North Metro Station currently under construction will have substantial impacts on the urban fabric of the adjoining Burwood North area and Burwood Town Centre. The station is forecasted to open in 2030, and will firstly connect with the Sydney CBD, Sydney Olympic Park and the Parramatta CBD[10], and in the future connect with the Western Sydney Airport. This new connection will provide expedited access to a larger potential catchment area of residents and customers. In particular, the direct link between Burwood and Sydney Olympic Park may allow for future growth of the tourism and hotelier sector with regional visitors deciding to stay in Burwood.

OPPORTUNITY: Explore how Burwood, and in particular Burwood North can cater for potential tourism opportunities that arise from the direct connection to Sydney Olympic Park and the Western Sydney Airport.

14 *InvestmentNSW, 2020 – Greater Sydney 24 Hour Economy Strategy.*
15 *Australian Bureau of Statistics, 2019 – Apparent Consumption of Alcohol, Australia between 2017-18 Financial Year.*
16 *Australian Institute of Health and Welfare, 2016 – National Drug Strategy Household Survey 2016: detailed findings.*
17 *Ingenium Research, 2019 – Measuring the Australian Night Time Economy, 2018.*

Social changes

Social attitudes and behaviours towards the night time economy are changing across Greater Sydney[13], Residents of Sydney are demanding more late night activities that do not centre around alcohol, and allow them to socialise in more intimate settings[14].

Another large social trend being observed across Australia is the significant reduction in the consumption of alcohol in people aged between 18 and 24, falling to its lowest level since the 1960s[15]. In 2016 it was identified that Australians aged between 18 and 24 are drinking less frequently than those in older age categories[16] and the range of non-alcoholic late night businesses and activities was expanding[17].

OPPORTUNITY: Capitalise on the demand for late night venues that don't rely on alcohol, such as entertainment, cultural and creative venues.

What is the night time economy?

The night time economy consists of all non-domestic activities which take place as the traditional 'business day' ends – between the hours of 6pm and 6am.

In the CBD, night time activities form a distinct environment to the day time equivalent, organised within three distinct periods. Each phase has unique dynamics and community needs[18]:

- **Evening** 6.00pm to 9.00pm
- **Night time** 9.00pm to 2.00am
- **Late night** 2.00am to 6.00am

The first conceptualisation of the night time economy in planning and urban governance appeared in Britain in the early 1990s[19]. Over the past three decades, many cities across the globe have deliberately fostered night time economies as a renewal strategy and to deliver objectives of safety, diversity, and productivity. Night time economies are defined by the unique factors of place and context, activity and aspirations, meaning no two night time economies will be the same[20].

The night time economy is diverse and vibrant, comprising a range of industries and activities. Using a combination of global best practice, three key areas of business activity are commonly referenced, categorised as 'core businesses' and six are referred to as 'supporting (non-core) businesses'[21]:

- **Core night time businesses**
  - Entertainment (e.g. clubs, sports, galleries, and performing arts)
  - Food (e.g. cafés and restaurants)
  - Drink (e.g. pubs and bars)
- **Supporting night time businesses**
  - Health (e.g. pharmacies and gyms)
  - Groceries (e.g. supermarkets and convenience stores)
  - Hospitality (e.g. accommodation, clothing and department stores)
  - Transport (e.g. public transport and on-demand services)
  - Services (e.g. dry cleaning and beauticians)
  - Social infrastructure (e.g. open space and community centres)*

“Each phase [of the night time economy] has unique dynamics and community needs.”

NB: 'Social Infrastructure' is not included in Sydney 24-Hour Economy Strategy but is a crucial consideration for Burwood's night time economy.

18 Sydney 24-Hour Economy Strategy, Investment NSW, 2020.
19 Night Time Economy Strategy, City of Ryde, 2016.
20 Sydney Night Time Economy: Cost Benefit Analysis – A Report for the City of Sydney Council, Bevan & Turnham, 2011.

Night time business classifications

Core

Entertainment

- Performing arts, music and culture
- Live sports and recreation activities
- Cinema
- Night clubs
- Galleries and cultural institutions

Food activities

- Cafés
- Restaurants
- Food trucks
- Food markets
- Food delivery services

Drink activities

- Bars
- Pubs
- Hotels
- Liquor retailing
- Wine tasting

Supporting

Health

- Pharmacies
- Medical centres
- Gyms

Groceries

- Supermarkets
- Convenience stores
- Fresh food stores

Hospitality

- Accommodation
- Retail business types
- Clothing
- Book shops
- Homewares
- Department stores

Transport

- Public transport
- On-demand services
- Uber/car share services

Services

- Drycleaning
- Beauticians and spas

Social*

- Open space
- Community centres
- Community groups and youth organisations
- Universities

**Category adapted by Burwood Council from industry best-practive*

Opening hour classifications

Day time
6am–6pm

Evening
6pm–9pm

Night time
9pm–2am

Late night
2am–6am

Benefits of a night time economy

A robust night time economy contributes to the local economy, creates a sense of place, strengthens community wellbeing, and will generate flow-on effects for other economies and aspects of the community.

Extend economic output into the evening

Improve **safety and reduce crime**

Encourage new investment and **attract skilled and professional workers**

Utilise vacant or disused **spaces for creative uses**

Retain residents spending to within the LGA

Foster a **local community identity**

> The night time economy delivers between 10 and 20 times the cost to benefit ratios[22 23 24]

Economic Benefits

The night time economy is recognised as making a significant contribution to the wider city and national economy. Research from London[25], New York[26] and Sydney[27] has shown that the night time economy delivers between **10 to 20 economic benefits to costs**, factoring all direct and in-direct costs such as policing, medical services and government services and regulation. A 2011 study commissioned by the City of Sydney identified $15.1 billion was generated by the night time economy industry per year, from the following sources:

- $425 million was generated by beverage-led businesses (liquor retail, pubs);
- $1.4 billion came from cafés, restaurants and takeaway food shops;
- $868.6 million was generated by entertainment-led businesses;
- Shops and retail turned over $3.9 billion, $2.3 billion was generated by infrastructure services; and
- $3.4 billion was attributed to other (libraries and archives, architectural etc.).

An analysis into the NYC night time economy found that in 2016 the nightlife industry supported 299,000 jobs and $35.1 billion in total economic output. Similar to other global cities such as London, the night time economy of New York City has in many areas outperformed its wider economy, with the five-year annualised growth rate[28].

22 *VisitEngland – The Night Time & Evening Economy – Realising the potential for Destination Organisations, 2012.*
23 *NYC's Nightlife Economy, Impact, Assets, and Opportunities – The Mayors Office of Media & Entertainment, 2019.*
24 *Sydney Night Time Economy: A Cost Benefit Analysis, City of Sydney 2011.*
25 *VisitEngland – The Night Time & Evening Economy – Realising the potential for Destination Organisations, 2012.*
26 *NYC's Nightlife Economy, Impact, Assets, and Opportunities – The Mayors Office of Media & Entertainment, 2019.*
27 *Sydney Night Time Economy: A Cost Benefit Analysis, City of Sydney 2011.*
28 *Creating a Healthy Night TimeEconomy: Key Culture Indicators for World Cities, World Cities Culture Forum 2020.*

Background research

> When you're out in a city you'll experience and happen upon things that no algorithm will ever put in front of you.
>
> Michael Rodrigues,
> Sydney 24 Hour Economy Commissioner

How does this align with Council?

Strategic document review

To understand the strategic context related to the Burwood night time economy, a series of twelve documents were reviewed. The following key takeaways relate to the most strategically important documents captured within this review. Further detail of the content of each document is provided in Appendix C.

Burwood 2036: Community Strategic Plan (CSP)

- The Burwood community desires public places that are safe and activated by day and night
- Transport and accessibility is a top value of the community, and similarly, traffic and transport is a key area residents would like to see improvement

Burwood Local Strategic Planning Statement (LSPS)

- Burwood's existing night time economy is strong, and can therefore be strengthened by improving and diversifying the current offerings
- Burwood's competitive edge is the town centre's restaurants, hotels, and entertainment facilities
- Programming interventions, including public art and music, is a key strategy to diversify the night time economy and attract visitation

Research into Local Employment and Investment in Burwood

- Burwood can leverage its night time economy by providing a diverse range of offerings, extending opening hours, and focusing on non-alcohol-based activities
- Retaining current planning controls that facilitate mixed-use development and late-night trading in the town centre will support a strong night life

NSW Government alignment

The Greater Sydney 24 hour Economy Strategy has been developed by Investment NSW and provides the strategic framework as a basis for this discussion paper. This strategy is framed around achieving three overarching success measures of social, economic and cultural outcomes. The three success measures will be achieved through the implementation of five strategic pillars in which
this discussion paper is aligned to, being:

1. Integrated planning and placemaking
2. Diversification of night time activities
3. Industry and cultural development
4. Mobility and improved connections
5. Changing the narrative

A key concept used throughout the strategy is the 'neon grid'. It is a conceptual way to analyse how different urban centres turn on and off during the night.

This concept is particularly important for Burwood to understand the broader Sydney network. For example understanding how Burwood can capture passing commuters and visitors between the Sydney and Parramatta CBD or how Burwood can act as a basis for future tourism and connecting domestic flights to the Homebush entertainment centre.

Future Transport Strategy by Transport for NSW sets the strategic direction for Transport to achieve safe, healthy, sustainable, accessible and integrated passenger and freight journeys in NSW. A key component of realising this vision is the integration of micromobility devices such as e-bikes and fully electric or power-assisted bicycles, tricycles, cargo bikes, scooters and skateboards. When integrated into the transport fabric, these modes of transport can reduce congestion and improve comfort of short journeys. The proliferation of the 15-minute city is supported by micromobility, which in turn can increase foot traffic and support local economies. This concept is particularly important for Burwood to:

- Consider micromobility needs when updating strategies and infrastructure design guidelines
- Support the integration of emerging modes through trials (such as the e-scooter trials), partnerships, collaboration, and a fit-for-purpose regulatory framework.

NSW Visitor Economy Strategy 2030 is a key document by Destination NSW that provides a roadmap to support visitor economy industries to recover from the impacts of disaster and grow into the future. Various actions are particularly important for Burwood to consider:

- Partner with Destination NSW to launch a new campaign to showcase the unique experiences Burwood has to offer
- Secure new festivals, sporting events, blockbuster musicals, exhibitions and business events for Burwood to accelerate the visitor economy's recovery, visitor numbers and expenditure
- Invest in new content in the form of images and video to showcase Burwood's current and emerging strengths

Since the implementation of the Strategy, Destination NSW has partnered with various local councils to develop marketing strategies to welcome visitors and locals to enjoy activities that will boost the local economy. Campaigns such as 'Feel New Sydney' with local extensions such as 'Feel New in Penrith' have included itineraries and drawcard activity planning to spark immediate appeal and drive long-term economic growth.

The Last Lion mural

A striking entrance to Burwood's Chinatown destination.

The Last Lion is a collaborative mural by Christina Huynh and Sophi Olding (pictured), commissioned by Burwood Council in partnership with Burwood Chinatown. The mural brings Australian and Asian culture together and effectively transforms an urban lane into a vibrant and activated community space.

Lead agency

- NSW Treasury

Support partners

- Department of Premier and Cabinet
- Destination NSW
- Create NSW
- Transport for NSW
- Department of Regional NSW
- Department of Planning and Environment
- Local Councils
- Destination Networks

The Last Lion won 'Best Entrance Art' as part of the Australian Street Art Awards 2022.

Location & transport analysis

Burwood is strategically located within the inner West of Sydney, with equidistant proximity to Parramatta and the Sydney CBD. The Burwood Town Centre has great north-south permeability and is well-serviced by various transport routes with great frequency and efficiency – a 15-minute train from Central Station with services every few minutes. Coupled with the development of major city-shaping transport projects, Burwood is shaping up to be positioned as a well-known and accessible night time destination.

Public transport

The Burwood Town Centre is serviced by several modes of transport from across Greater Sydney. While Burwood Train Station is the major transport hub within the precinct, other key destinations such as Burwood Chinatown, Burwood Park, and Burwood Westfield, are well-serviced by bus and metro routes. In 2013, Burwood was ranked the 15th busiest station on the Sydney Trains network, recording some 20,040 entry and exit movements on a typical weekday[29].

Burwood is served by **20 unique bus routes** (407, 408, 410, 415, 418, 420, 458, 461N, 461X, 464, 466, 490, 492, 526, 530, 539, M90, N50, N60, N61) and **4 unique train routes** (T1 North Shore & Western Line, T2 Inner West & Leppington Line, T3 Bankstown Line, T9 Northern Line). Several of these routes capture Burwood as an origin and end destination – including M90 Liverpool to Burwood and 461X City Domain to Burwood.

Arrivals to Burwood come from a range of destinations with key interchanges, such as Homebush, Strathfield, Liverpool, Ashfield, and Lidcombe. Overall, however, Burwood Station is predominately an origin station – more passengers enter the station than exit during the morning peak period, and the reverse in the afternoon peak period.

There are a total of 26 bus stops within the precinct, the majority along Burwood Road and clustered around the train station. Most commonly, bus routes capture four stops within the Town Centre precinct – two at Burwood Train Station, and one each opposite Burwood Westfield and Burwood Park[30].

Generally, bus routes into Burwood operate later into the night than trains. Cut-off times for trains arriving to Burwood average at 12:57am across the week, and 12:36am average for final departures. Final individual arrival and departure times for Burwood Station (train and bus) are detailed below.

NB: The following data refers to a continuous night time journey – meaning a 1:30am Sunday morning arrival would be counted within the previous Saturday night trip.

	Train	Bus
Final arrival	1:30am (Saturday night, T1)	1:58am (Saturday night, N61)
	12:39am (Wednesday night, T2)	2:07am (Wednesday night, N60)
Final departure	1:05am (Saturday night, T9)	1:49am (Saturday night, N60)
	12:21am (Wednesday night, T9)	1:49am (Wednesday night, N60)

Based on an arbitrary tap-on analysis, the following figures indicate the approximate tap-on activity at Burwood Station in mid-2016:

- 6pm – <1,000 – 10,000 tap ons
- 7pm – 500 tap ons
- 8pm – 250 tap ons
- 9pm – 250 tap ons
- 10pm – 250 tap ons
- 11pm – >100 tap ons[31]

29 Memorandum – Burwood Town Centre – Traffic and Transport Opportunities and Constraints, AECOM, 2015.
30 Based on TripPlanner data, 2023.
31 When does your commute begin? Visualising Opal data, SGS Economics & Planning.

Major projects

The Burwood Town Centre will benefit from various transformational transport projects, namely WestConnex and Sydney Metro West. Unfolding to the north of the Town Centre along Parramatta Road, these projects will improve access and connectivity of Burwood's road and transit network, and drive visitation to Burwood Town Centre.

WestConnex is a catalytic project by the NSW Government linking Sydney's west and southwest with the city, airport, and port in a 33km continuous motorway. The project is staged to alleviate congestion and provide improved travel times on Parramatta Road – a key thoroughfare to Burwood North and The Burwood Town Centre[32].

Sydney Metro is Australia's biggest public transport project with planned works for Burwood North Station, located at the corner of Burwood and Parramatta Roads. The new station will include entrances along Burwood Road, to the north and south of Parramatta Road. Temporary changes to traffic conditions include partial road and footpath closures on Burwood Road.

Micromobility

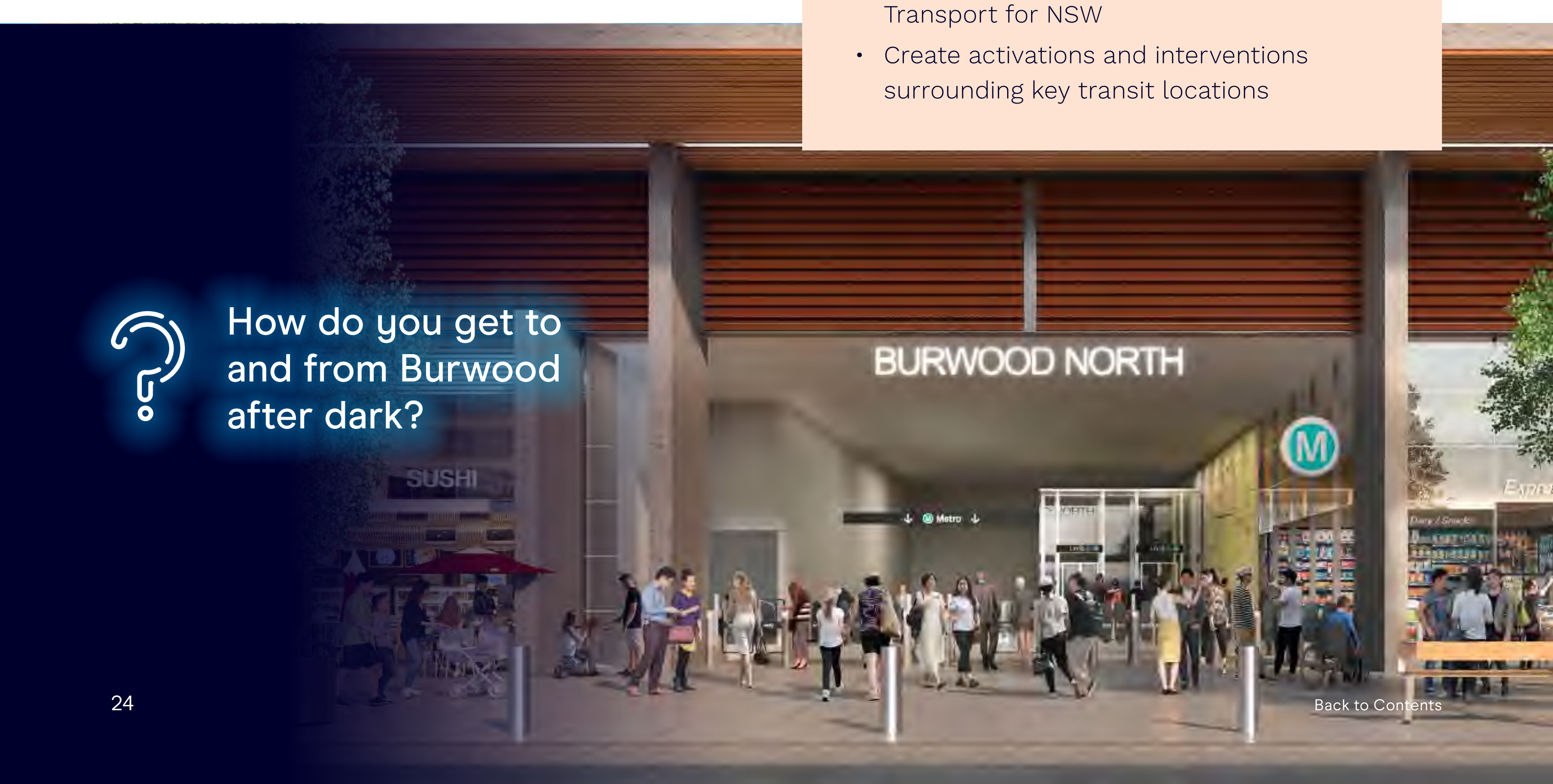
Micromobility is emerging as an informal transport mode focused on the use of small, lightweight vehicles for individual use, such as bicycles, e-bikes, and scooters. Bicycle routes (i.e. dedicated bicycle lanes, shared paths for use by pedestrians and cyclists, roads with mixed traffic lanes) are not currently mapped along Burwood Road; only at the point that it intersects with Railway Crescent. Primarily, Burwood's cycling routes are limited to the perimeter of The Burwood Town Centre[33].

Connectivity to Sydney Olympic Park

Burwood is located in proximity to Sydney Olympic Park – a world-class event, sport, and entertainment precinct. Located just 8kms north-west of Burwood, the 526 bus route from Burwood directly services Sydney Olympic Park with an average frequency of every 20 minutes. Commonly activated on show and game nights, the precinct is a popular destination for locals and visitors alike.

Transport opportunities for The Burwood Town Centre

- Conduct an audit of current and potential flow of transport movement in The Burwood Town Centre and neighbouring LGAs to understand patterns of visitation
- Investigate opportunities for community bus / shuttle bus transport from the city centre dropping off at key destinations e.g. Burwood Chinatown, Sydney Olympic Park
- Increase number of rapid routes from the CBD to Burwood to improve bus mode share
- Position Burwood night time economy as an earlier night time economy e.g. 8pm–10pm – visitors can then continue their journey to nearby centres/CBD, returning to Burwood before or after midnight
- Explore potential for Burwood as a dining or gaming destination pre- or post-event at Sydney Olympic Park
- Invest in dedicated bicycle lanes/shared path along Burwood Road
- Investigate an E-scooter shared scheme trial, similar to those delivered by Transport for NSW
- Create activations and interventions surrounding key transit locations



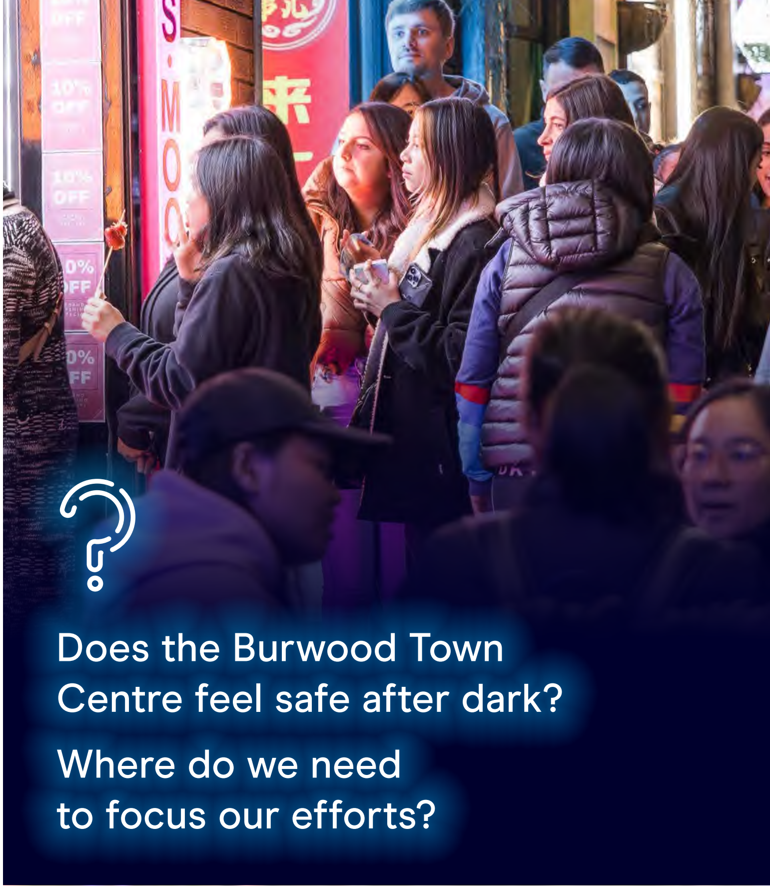
Safety at Night

Ensuring safety and wellbeing is a crucial responsibility not only for State and local governments, but also for industry and the broader community. It is essential for everyone to take part in maintaining a safe environment within the 24-hour economy. In order to achieve this goal, we should enhance **community-led initiatives** focused on safety and wellbeing and expand them to cover the various hubs across Greater Sydney[35].

Given the night time economy's susceptibility to issues related to anti-social behaviour, it is important to address any existing problems of this nature in Burwood. The presence of anti-social behaviour, whether real or perceived, can discourage local residents, workers, and visitors from engaging in the area's night time economy.

The statistics provided by the NSW Bureau of Crime Statistics and Research (BOSCAR), shown in the figures below, indicate that **Burwood is generally a safe area with lower incident rates compared to the rest of NSW**. However, reported crimes tend to be concentrated in high traffic areas, such as around Burwood Train Station, Burwood Park, and Burwood Road High Street[36].

To foster a positive community perception of the centre during late hours and encourage increased night time activity and visitation, it would be necessary to implement heightened active and passive surveillance in and around Burwood. This will likely be achieved as new development is constructed, and areas of the public domain are revitalised with ground floor businesses.



Incidents of Assault (Non-domestic) in Burwood (Jan 2022 to Dec 2022)

An analysis of assault at night within the LGA shows the rate of incidents is below the average across NSW. While this is positive, ongoing work will be required to keep reducing incident rates.

34 Sydney 24 Hour Economy Strategy, NSW Government, 2020.
35 ibid.
36 NSW Bureau of Crime Statistics and Research, 2022.

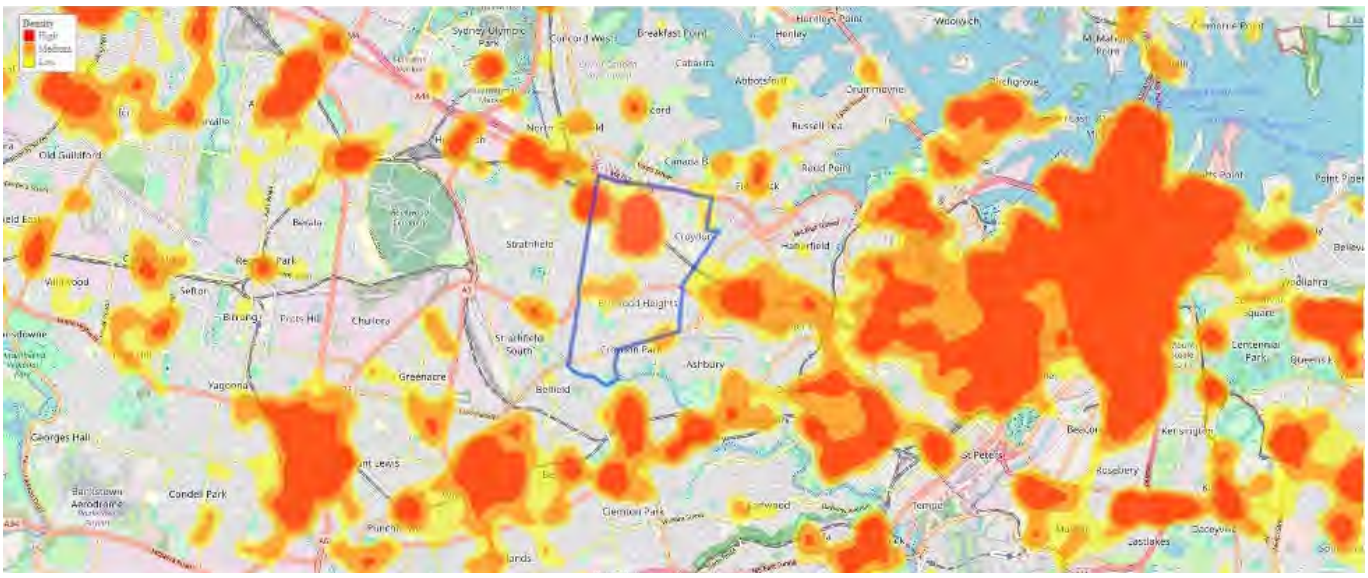


Figure 4: Incidents of Assault (Non-domestic) in Burwood (Jan 2022 to Dec 2022)
Source: BOSCAR 2022

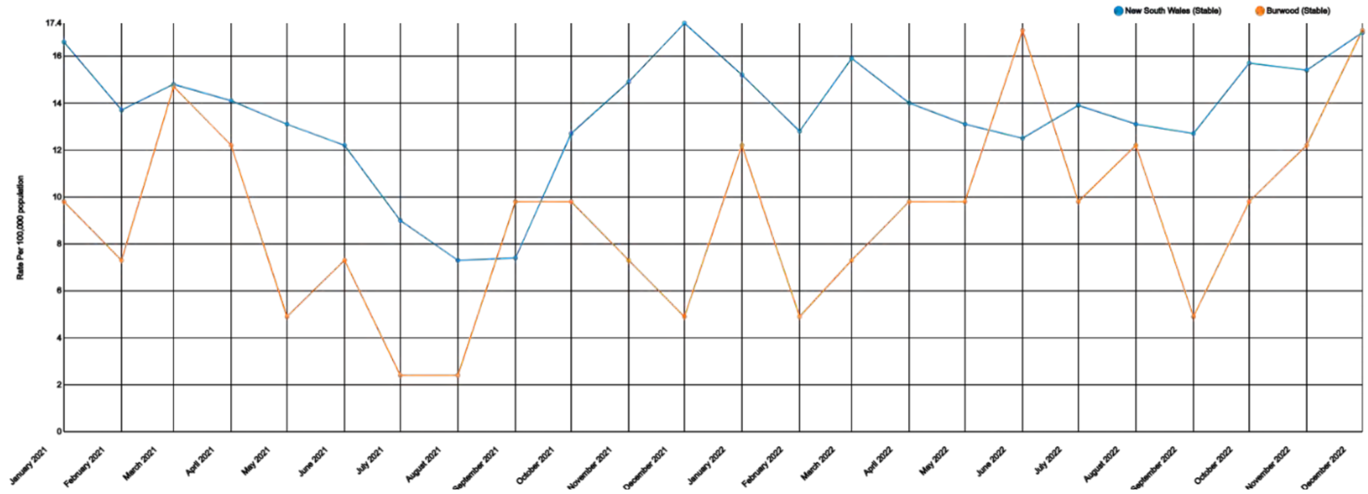


Figure 5: Incidents of Assault (Non-domestic) occurring at night in Burwood (Jan 2022 to Dec 2022)
Source: BOSCAR 2022

Incidents of malicious damage to property in Burwood (Jan 2022 to Dec 2022)

As identified, rates of incidents of malicious damage to property in Burwood are nearly half that of the NSW average.

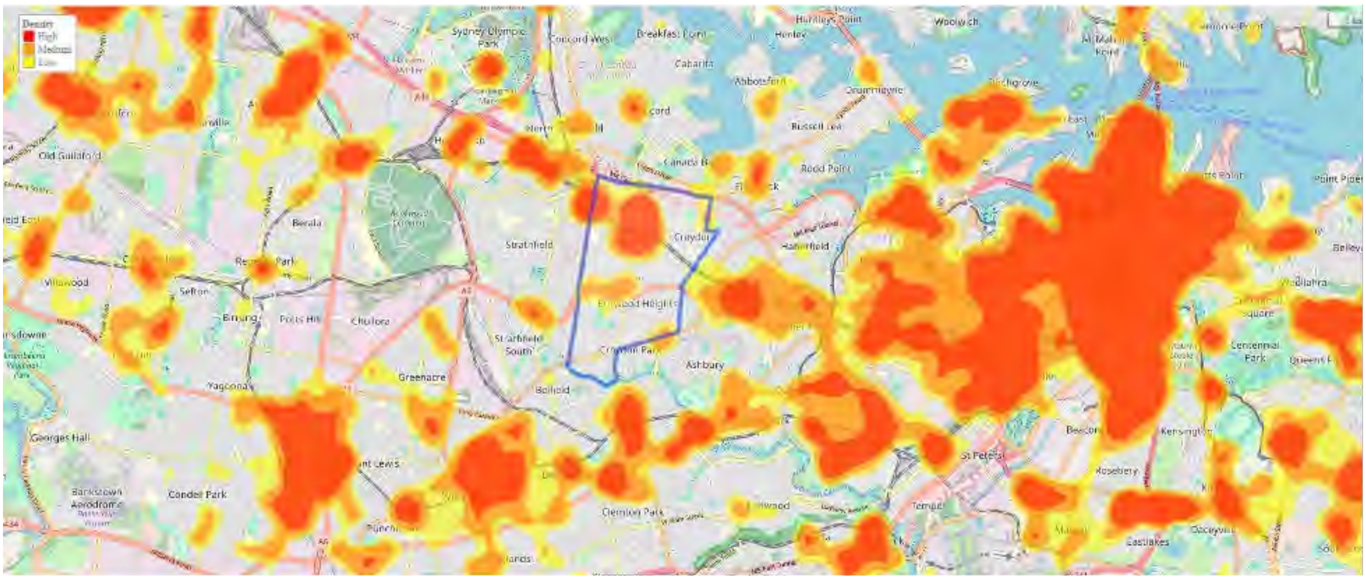


Figure 6: Incidents of Malicious damage to property in Burwood (Jan 2022 to Dec 2022)
Source: BOSCAR 2022

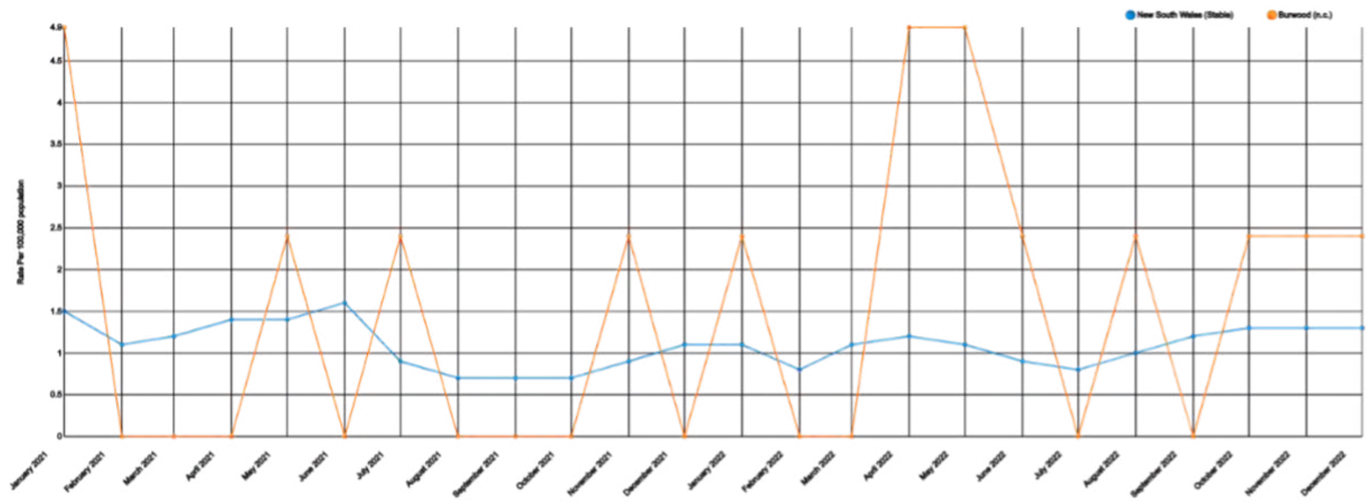


Figure 9: Incidents of Robbery at night in Burwood (Jan 2022 to Dec 2022)
Source: BOSCAR 2022

Economic overview

The economic overview considers the economic conditions which impact the night time economy and how Council can support businesses, leverage competitive strengths and plan for a relatively uncertain period ahead.

Macro-economic conditions

- Short-term challenges in 2023-2024 before an expected pick-up in consumer confidence from 2025
- Economic growth projected to be 1.5% in 2023 and 2024
- Support over the next 18-24 months will be essential while Burwood's night time economy moves through a narrow path to projected increased stability and prosperity in 2025

Household spending is split as there has been strong wage growth and additional savings, offset by higher interest rates and inflationary pressure

Business investment and public demand is starting to show positive signs after a slow period

An expected 12–24 months of economic uncertainty will mean short term support is critical to NTE Activity

Night time spending is more discretionary than day-time spending so providing an attractive experience will be critical to support the NTE

Macro-economic conditions for night time activity suggest an incoming period of trepidation with tentative spending and consumer confidence over the next 18-24 months. The short-term circumstances are uncertain as a result of global and national economic conditions. While the economy is generally stable, there is lingering apprehension about the state of the economy. This issue could impact discretionary spending on night time economy activities which have a higher discretionary propensity than certain daytime retail. The offset to the economic challenges are that employment has remained at historic lows around 3.5% and is not expected to change significantly.

The short-term nervousness is expected to be followed by a smoother economy with increased economic growth and consumer confidence from 2025. In regards to planning for Burwood's night time economy, support during the next two years will be essential while the economy moves through a narrow path to projected increased stability and prosperity in 2025.

A full breakdown of economic conditions and impacts is outlined in Appendix A.

Broader night time economy conditions

- The majority of Australia's core night time economy establishments belong to the food sector (63%), followed by entertainment (30%) and drink (7%)
- Distribution across these three subsectors has continued a trend towards more food and entertainment and fewer drink establishments
- This growth aligns well with Burwood, which has a diversified night time activity and smaller proportion of drink related activities than other night time areas in Sydney

Quiet confidence of growing demand and diversity

Opportunity to further grow the night time economy to an overall larger economic contributor

Ongoing residual challenges from COVID & Cost of living crisis

Changing demand away from alcohol related activity but very sensitive to location

A 2022 research project 'Measuring the Australian Night Time Economy 2020-21 In June 2021', outlined that Australia's Core night time economy comprised 123,316 establishments. Most of these businesses belong to the food sub-sector (63%), followed by entertainment (30%) and drink (7%). The distribution across these three sub-sectors has continued a trend towards more food and entertainment and fewer drink establishments.

This growth aligns well with Burwood which has a very diversified night time activity and a smaller proportion of drink related activities than other night time areas in Sydney and further afield. The comparison of the case studies with regard to night time offerings is in part 3 of this report.

Burwood will be servicing an increasingly larger population based on new residential development, and with a future cross-path between a suburban rail and metro station station, we are located in a prime position to leverage a greater value out of the night time economy.

A detailed consideration of growing the night time economy is outlined in Appendix A.

Retail trends

Digital and physical retail settings are becoming fluid and fully integrated. Increasingly, the retail industry is leveraging opportunities to offer immersive, hybrid, and interactive environments that focus on the value of experience over consumption[37]. These trends are supported by thematic case studies that make the case for economic development through enhanced customer experience.

Immersive: crafting immersive retail experiences

The experience economy is permeating the retail sector and heralding a focus on crafting sensory-rich environments. Many retail and hospitality brands are creating a destinational appeal as customers continue to seek the memorable over the material.

CASE STUDY: 'Wonderland' by Viral Ventures – multiple locations
Places that integrate immersive storytelling is an emerging niche in retail. 'Wonderland' by event producers Viral Ventures is a unique immersive space combining cocktails, escape rooms, and theatre. The company has a global portfolio of 13 themed venues and many additional pop-up events across Australia, USA, and UK. These uniquely curated events put the customer at the heart of the action, transforming the traditional retail or hospitality experience[38].

37 REMIX Summit 2022: Culture, Technology, Entrepreneurship, Sydney.
38 Viral Ventures 2023, Wonderland, Viral Ventures.

Hybrid: blending digital and physical environments

Augmented and virtual reality technology (AR and VR) is emerging within the retail world as a complement to instore experience and as an opportunity to expand the boundaries of traditional retail floorspace. As a trend, it recognises that parts of the retail experience cannot be replicated online and aims to integrate technologies that enhance the shopping environment.

CASE STUDY: L'Occitane 'Digital Provence Theatre' – Tokyo, Japan
Opportunities where customers can interact with a product virtually in real-time are increasing in popularity. L'Occitane's partnership with renowned artists teamLab created a bespoke experience that capitalised on two assets: Asia being the brand's major audience for sales, and a local appetite for digital experiences within a foreign environment. An interactive Flower Table triggered stunning visuals, aroma, and the display of product information that would otherwise not be available in a typical retail store[39].

Interactive: expanding retail offerings

Retail environments are increasingly leveraging interactive offerings. Stores with opportunities for customers to engage in leisure and play can provide a rejuvenating escape to counteract the busy lifestyles and constant connectivity of the digital age.

CASE STUDY: Fortress eSports – Sydney, Australia
eSports, a form of competitive organised video gaming, is transforming into a lucrative market attracting brands and retailers. As with concerts for music and theatres for movies, eSports aims to bring the viewing experience offline in a live setting. Fortress, the largest games and entertainment venue in the Southern Hemisphere, recently opened in Central Park Mall Sydney. The venue combines an eSports game arena, arcades, sci-fi inspired bar, and private party booths, open until 11pm on weeknights and until 2am on Fridays and Saturdays[40].

Planning implications

Several planning opportunities to facilitate innovative and agile retail environments within the retail primacy of the Burwood Town Centre are at our disposal. They present an opportunity to grow the proportion of 'entertainment' night time activities, noted at a current 3%.

Flexible retail tenancies: A suitable planning intervention to facilitate retail and market demand advancements is providing flexible retail spaces. This can be achieved by:

- **Lower costs:** Facilitating temporary or pop-up retail spaces for a lower cost than conventional retail rates.
- **Adaptive reuse:** Leveraging otherwise under-utilised spaces, existing floorspace, or filling gaps between longer term retail leases.
- **Incentives:** Increasing incentives for prospective tenants, such as rent-free periods of paying for a business' fit-out. Burwood has a vacancy and incentive rate of 5% and 20%, respectively – comparable to figures of the Sydney CBD. While nearby Strathfield also has an incentive rate of 20%, vacancy rates are at 33% - nearly seven times that of Burwood[41].

Other considerations for retail improvement within The Burwood Town Centre include:

- Marketing and attraction: Maintaining a vibrant high street experience and attracting landmark retail destinations. Potential anchor tenants such as Viral Ventures, Fortress, or Meow Wolf may be investigated as a drawcard destination, and pop-up advertising can be considered.
- **Lighting and signage:** Enhancing visibility and visual interest of retail lighting and signage, such as display windows in mixed-used buildings, particularly at night. Vacant shopfronts can be activated with lighting or public art.
- **Innovative business partnerships:** Establishing partnerships between retail businesses, technologists, and arts organisations to enhance the retail experience.
- **Business co-location:** Facilitating mixed-use business opportunities to encourage retail to diversify their offerings.
- **Higher telecommunications capacity:** Keeping pace with the higher energy and technological demands of smart retail.

39 *Brickfields Consulting 2018, Responsive Retail (The Place Report Trend #55), Sydney.*
40 *Central Park Mall 2023, Fortress Sydney, media release.*
41 *SGS Economics & Planning 2020, Burwood Local Employment and Investment Strategy, Sydney.*

Augmented and virtual reality technology (AR and VR) is emerging within the retail world as a complement to instore experience and as an opportunity to expand the boundaries of traditional retail floorspace.

Market overview

The following considers both the prevailing property market conditions as well as the night time economy market as it currently stands. Overall the market in Burwood is strong, elastic and well positioned for further growth. It is anchored by Burwood Train Station and the future Burwood North Metro Station which provide strong foundations for retail and commercial space. There is also a consideration of major retail trends and how this impacts the future night time economy opportunities for Burwood.

Market conditions summary

- Strong fundamental market position including low vacancy, healthy yields and competitive net face rents
- Competitive upcoming position with further residential development and a new Metro Station to anchor Burwood Road at each end

Net face rents ($/sqm)	Sale price	Vacant properties (Sale & lease)	Yield
$684	$14,100	29	4.8%

The property market in Burwood is generally characterised by relatively low long term vacancy, steady transactions and rents which reflect the strong retail turnover densities and demand. The advertised median rental price ($/sqm per annum) is $684 at the time of writing. The low vacancy and steady yields lend to a market that is elastic and not prone to over-supply of retail space – something that impacts many other retail centres in Sydney.

Statistical analysis of night time & visitor economy

A statistical analysis of core night time activities has been undertaken for Burwood. The analysis used geo-referenced web scraping to record 112 core night time economy businesses. Using designations from the 'Sydney 24 Hour Economy Strategy', the core night time venues are divided into Entertainment, Drink Activities and Food Activities.

Core night time economy venues	Supporting night time economy venues
112	52

Using designations from the 'Sydney 24 Hour Economy Strategy', core night time activities in Burwood are split as per the below. Burwood has a unique mix with a considerable split of entertainment venues and a smaller number of drink activities compared to other centres and case studies (see below).

Entertainment	Drink activities	Food activities
20	10	82
18%	**9%**	**73%**
30%	**7%**	**63%**

Breaking the venues down into sub-categorisations indicates a remarkable diversity and quality of businesses:

- Major contribution of Chinese restaurants (36%) of the total night time economy businesses)
- Mixed contribution of bar, fast food, pub, karaoke, and community use
- Average rating of night time economy venues in Burwood is 3.84 based on an average of 293 reviews per night time economy business
- A high proportion of new high-rating venues are out-performing more established venues
- The majority of night time economy venues in Burwood close by 10pm, however over 27% shut at midnight or after

Accommodation and short term rental analysis

Short-term rental accommodation is a long-standing practice in NSW commonly associated with holiday letting. Through providers such as Airbnb, short-term accommodation is a home-sharing activity and contributor to local economies that is increasing in popularity, often as a supplement to hotels, motels, or bed-and-breakfast style accommodations.

Burwood-Croydon has 102 current listings of short-term accommodation. Of these properties, 91% are listed on Airbnb, 1% are listed on Vrbo, and 8% are listed on both. The majority of listings are clustered to the north of Burwood Station, particularly to the east of Burwood Road surrounding Westfield Burwood.

While Airbnb remains a popular choice for visitors to Burwood, hotels are few and far between. A total of 11 accommodation options are listed on Booking.com within the Burwood Town Centre precinct. Crowne Plaza Sydney Burwood, located near Burwood Park, is the most popular hotel accommodation of these, with consistently high ratings and quality amenities.

Private rentals – property type and size

Short-term rental properties are almost evenly split between entire homes and private rooms. A total of 53 listings are (52%) entire home, 47 are (46%) private room, and 2 (2%) shared room. Property size is of a smaller nature yet hosts a larger number of guests, with an average of 1.9 bedrooms and 4.7 guests across all listed properties. The following figures indicate the split of property size of Burwood-Croydon short-term rentals:

- 1 (2%) Studio
- 16 (30%) 1 bedroom
- 24 (45%) 2 bedroom
- 10 (19%) 3 bedroom
- 1 (2%) 4 bedroom
- 1 (2%) 5+ rooms

Private rentals – growth and rating

Rental growth has been growing steadily following a significant downturn in early 2020, with a current quarterly growth of 13%. Between Q1 2020 and Q1 2023, Burwood-Croydon rental growth nearly halved – from 223 properties listed to 122 properties listed (current). Overall ratings are high, with an average rating of 4.35 and over 50% of properties receiving a rating of at least 4.5. Short-term rentals are best-rated for check-in, communication, and location.

How do we compare?

Burwood in fact has a more established short term rental market than the surrounding centres of Strathfield, Parramatta-Rosehill, and Homebush Strathfield. However, neighbouring centres Parramatta and Strathfield have a significantly larger number of hotels compared to Burwood. **Accommodating larger families and visiting groups will be a key consideration for Burwood in the future**, as the average 1-2 bedroom private rental configuration may not prove fit-for-purpose.

Burwood-Croydon	Strathfield	Parramatta-Rosehill	Homebush
102 active rentals	90 active rentals	80 active rentals	48 active rentals

Accordingly, **Burwood's ability to accommodate patrons of Sydney Olympic Park events will need to be considered.** With Homebush containing less than half of the number of total rentals within Burwood, the Burwood Town Centre has the means to be the night-stay destination of choice, when supported by appropriate hotel and transport infrastructure. While private Airbnb properties are in abundance, the feasibility of new hotel and motel establishments will need to be investigated to complement these private rental uses.

How do we compare?

A comparative analysis of the night time economy in Burwood and five other night time economy destinations has been undertaken. The purpose is to understand the market factors, business composition and spread of activities and identify where Burwood's strengths and opportunities lie relative to other night time destinations. It also provides a point of comparison for potential investment.

The five night time economy areas for the comparative analysis are:

Haymarket (Chinatown)
Sydney

Haymarket is located in the southern part of Sydney's central business district. It accommodates Sydney's original Chinatown, as well as most of Thai Town and a diverse range of other uses. Located on the edge of Sydney's city centre, Haymarket leverages the large commercial and tourism markets which are focused on the central business district (CBD), however has its own distinct locality and sense of place. While the location as part of the CBD opens it to a much larger market it also clouds official demarcation points between it and other sub-precincts. This means it now has a very diverse range of night time economic activities.

Degraves Street & Flinders Street
Melbourne

Degraves St, near its intersection with Flinders Lane is a pedestrianised dining and night time precinct in Melbourne's CBD within the Hoddle Grid. It has a high density of night time activity. It is a useful comparison as an aspirational target for a further matured night time centre.

Hurstville
Sydney

Hurstville is a major retail centre and transport interchange that shares many similar characteristics to Burwood. It has a busy railway station, a large independent dining scene, as well as a big box Westfield shopping centre within immediate proximity to the railway station. Hurstville is also known as a centre of Chinese and other Asian dining. Hurstville is a useful point of comparative analysis as it is also a suburban centre. Its successes and challenges can help inform night time economy considerations for Burwood.

Camden Town
London, United Kingdom

Camden Town is a major centre in North London, located 4-5km from Central London. Similar to Burwood it is a linear centre, focused on Camden High Road and locally is the administrative centre for the Borough of Camden. It is a busy, vibrant night time economy and could be an aspirational vibrancy target for Burwood. Camden is well known in London. It is not usually considered a globally recognised London night time centre such as the West End, Shoreditch or Chelsea but is a regional night time economy centre of significance.

Melrose/Fairfax
Los Angeles, United States

The intersection of Melrose and Fairfax avenues is a large commercial strip with a significant night time economy. Located in West Los Angeles, it falls in the Fairfax area, around 1-2km south of the much more famous Sunset Strip and east of West Hollywood and Beverley Hills. Like Camden, it is regionally well known, without being a global night time economy centre like the two mentioned above, Hollywood or Santa Monica. Burwood is in the aspirational phase of reaching for regional status without likely becoming a global night time economy hub.

Figure 10: Case study comparison (NB: for Burwood Benchmarking, refer to Appendix B)

Case study	NTE Venue Count	Economic and Market Characteristics, Business Composition	Business Longevity & Review	Lessons for Burwood
Haymarket (Chinatown), Sydney	182 core NTE venues Entertainment: 8% Drink activities: 23% Food activities: 69%	• Very high rent market with net face rents for retail and night time economy suitable spaces averaging around $1,100/sqm per annum. • The split in businesses in Haymarket reflects the evolution into a broader Asian precinct • Noticeable mix of Thai, Japanese, Korean, and bars and cafés trading at night • Larger 'Drink Activity' focus than Burwood	• The average restaurant score for Haymarket is 3.98, based on google reviews with the average review number per venue of 458 • Haymarket is supported by some anchor institutions which can be important in creating a sense of place • Haymarket is somewhat comparable to Burwood, however has a slightly later profile. While four out of 10 businesses in Burwood close between 9pm and 10pm, there is a more even split in Haymarket.	• Haymarket has evolved from its reputation and is still centred around Chinatown while now having a significant diversity of Asian night time activity and other options. • Burwood in comparison to Haymarket is substantially more affordable in terms of net face rents which based on market availability are close to half what the rate asked for in Haymarket. This provides opportunities to consider pricing, attracting new businesses and being a centre for less established market players. • The number of Chinese restaurants in Haymarket (50) is now similar to Burwood (41), however it is less dominant in Haymarket. • The reviews for Haymarket are slightly higher than Burwood and it has some anchor institutions that provide a noticeable point of offer and sense of place. Leveraging well known anchors could be a way to support all businesses in Burwood
Hurstville, Sydney	103 core NTE venues Entertainment: 1% Drink activities: 7% Food activities: 92%	• A comparable rent market with net face rents for retail and night time economy suitable spaces averaging around the $600-$700/sqm range. This is comparable with Burwood. • The split in businesses in Hurstville is similar to Burwood in that Chinese restaurants comprise just over 40% of all NTE businesses.	• The average restaurant score for Hurstville is 3.90, based on google reviews with the average review number of 280 • Hurstville has an overall earlier profile than Burwood. In Hurstville only 17% of activities are open past 10pm, while the comparable figure is 38% in Burwood. • 85% of Hurstville businesses close by 10pm on Friday nights.	• Hurstville is a very similar profile in many ways to Burwood. It's later night offer after 10pm however is very limited and this likely means that vibrancy after 9pm would be significantly lower. • Burwood should look to continue to foster a diverse range of later night options to ensure vibrancy continues later into the evening and economic opportunities can cultivate. • Burwood has a higher capital price than Hurstville however with a lower vacancy rate and comparable net face rents. This leans towards Burwood being a better investment for long term capital and safer investment market. While yields are lower it should encourage Council to consider ways to emphasise the investment attraction of Burwood's capital assets.

Case study	NTE Venue Count	Economic and Market Characteristics, Business Composition	Business Longevity & Review	Lessons for Burwood
Degraves Street/ Flinders Street, Melbourne	160 core NTE venues Entertainment: 4% Drink activities: 66% Food activities: 31%	• Degraves Street has a very high volume of 'drink activities' – many of which do cross over with food and entertainment • Rental and capital values are far higher than Burwood. • Larger 'Drink Activity' focus than Burwood • The split in businesses in Degraves Street is markedly different from Burwood. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants.	• The average restaurant score for Degraves Street is 4.12, based on google reviews with the average review number of 609 • Criticality of anchor institutions to support a cycle of new and 'in' venues • Overall later night profile than Burwood – the highest time period for closure is 2am when over 40% of venues have a listed closing time.	• Degraves Street as a high average rating of 4.12. This could be an aspirational target for Burwood institutions to aim for, noting however that it is not a reflection of the offer. An average of 4 may be a useful marketing tool/economic development tool. • The very high capital prices and net face rents in comparison to Burwood, highlight how affordable suburban NTE is against city centres and building on this attractive incentive to continually grow the NTE economy. • Growing the late night NTE options further could be an aspirational target for Burwood.
Camden Town, London	240 core NTE venues Entertainment: 9% Drink activities: 37% Food activities: 54%	• Rental and capital costs reflect the high profile nature of the area, however the revenue ability may not actually be significantly greater on a sqm basis • Camden Town shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants. For a Borough which is ethnically diverse (35.4% white British in the 2020 Census), the night time offer is not especially diverse.	• The average restaurant score for Camden is 4.11, based on google reviews with the average review number of 741 • Many of the higher reviewed anchor establishments have reviews over 4 stars • The spread of night time activity in Camden shows that it has an overall later night profile than Burwood – the highest time period for closure is 2am when over 40% of venues have a listed closing time.	• An aspirational target of 4 for average ratings should be able to be achieved. • The long term market pressures show high capital value and low yield suggesting the value of night time suitable assets is likely to move slowly. • Vacancy is almost at 10% in Camden. Burwood needs to carefully manage how adding new floorspace to the centre can impact absorption times and stress test the elasticity of current net face rent and changes to that from new development.
Melrose/ Fairfax, Los Angeles	152 core NTE venues Entertainment: 1% Drink activities: 31% Food activities: 68%	• As a significant but secondary (not global) retail centre, it shows firstly the market considerations in comparable centres, but also the opportunity Burwood has to leverage of globally competitive rates in a very high-income country • The split in businesses in Melrose is markedly different from Burwood. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants.	• The average restaurant score for Melrose is 4.29, based on google reviews with the average review number of 507 • The spread of night time activity in Melrose shows that it has an overall later night profile than Burwood • Melrose has a very consistent night time close profile with no dominant closing slot	• Melrose and Fairfax present an aspirational target for Burwood to become an established regional NTE destination. This is to reach the level below global prominence such as Bondi Beach or Barangaroo and aim for a regional power. The benefits of helpful trade conditions with much lower capital investment and risk.

Ta Hien Beer Street
Hanoi, Vietnam

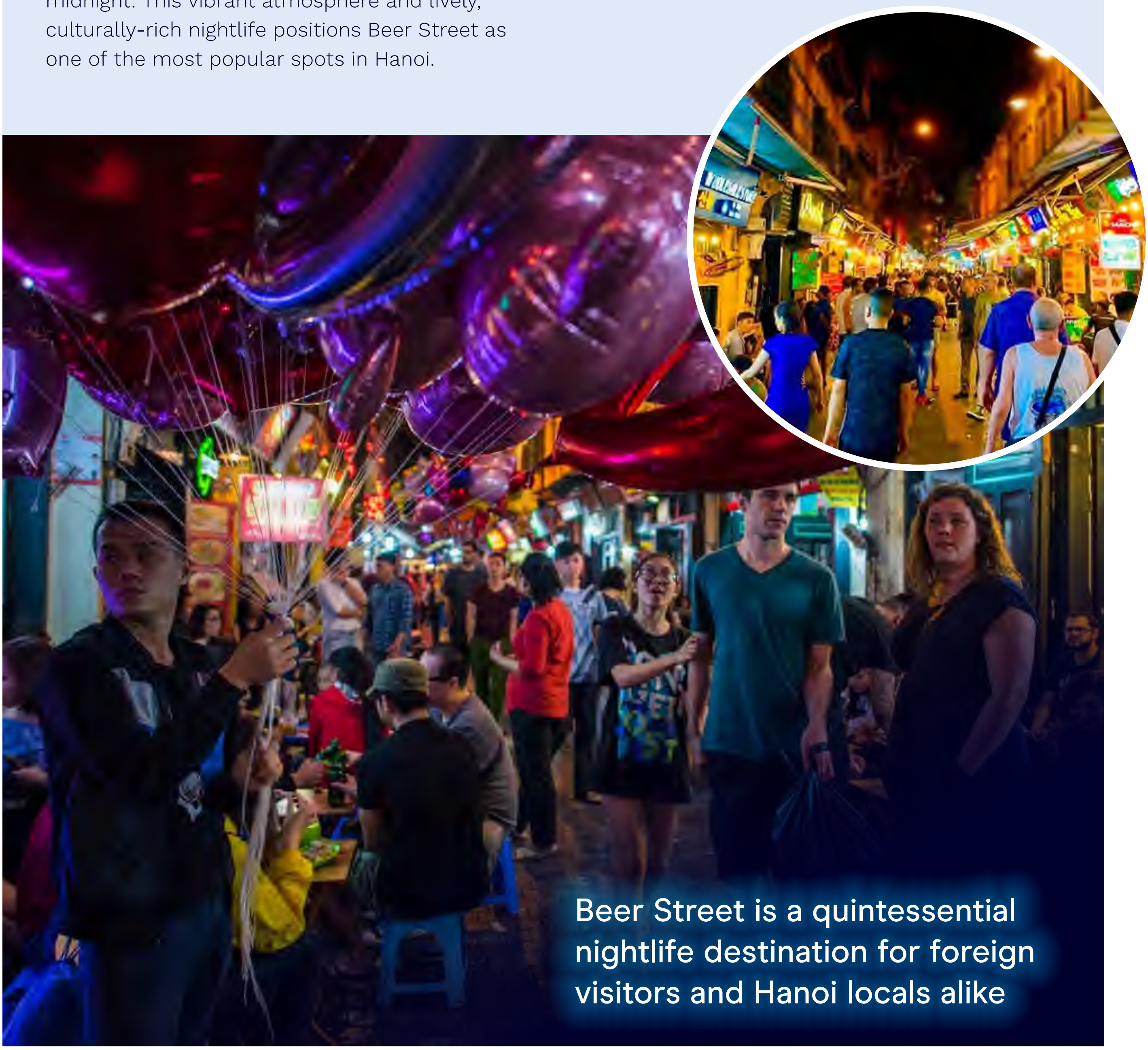
Located in the heart of Old Quarter, Ta Hein Beer Street is a quintessential nightlife destination for foreign visitors and Hanoi locals alike. The street is bustling with mixed activities – from authentic Vietnamese eateries and street food, myriad local beer varieties, to live music, bars, and pubs.

On weekends, passerbys can enjoy live music performances and entertainment from 8pm to 10:30pm, before a curfew is enforced just after midnight. This vibrant atmosphere and lively, culturally-rich nightlife positions Beer Street as one of the most popular spots in Hanoi.

While Beer Street is most commonly renowned for affordable, locally-sourced beer, the street is a positive place to socialise. Its simple design is defined by movable plastic chairs and stools that line the street's edges.

Beer Street is an international crossroad – a gathering place conducive to conversation across different cultures and generations. Ta Hein Beer Street is nearby the famous Thang Long Theatre and Hanoi Night Market – strategically located for a night-out.

Source: Beer Street Hanoi – Everything You Need to Know, Wander Vietnam



Beer Street is a quintessential nightlife destination for foreign visitors and Hanoi locals alike

Burwood's night time economy

> When we talk about a 24-hour economy, the focus is on how we make our economy just as vibrant, productive and diverse in the night as it is throughout the day.
>
> InvestmentNSW

Our night time economy

Burwood's night time economy is bustling with a variety of restaurants open late, which could be complimented by a focused effort for additional entertainment and cultural venues. As Burwood grows from a town to a city centre, there is an opportunity to develop a more vibrant and diverse night time economy that caters to a broader audience.

Place identity and activity

The Burwood Town Centre is comprised of a diverse and dynamic range of identities and activities. These sub-precinct identities can be distinguished through clusters of local business, public assets, catalytic projects and initiatives, and key landmarks. Each sub-precinct has unique opportunities to leverage and diversify Burwood's night time economy, positioning the Town Centre as a desirable place to live, learn, work, rest, and play.

The following pages identify six core sub-precincts within the Burwood Town Centre precinct based on their respective existing and emerging economic and cultural identities. Broadly, they are summarised as:

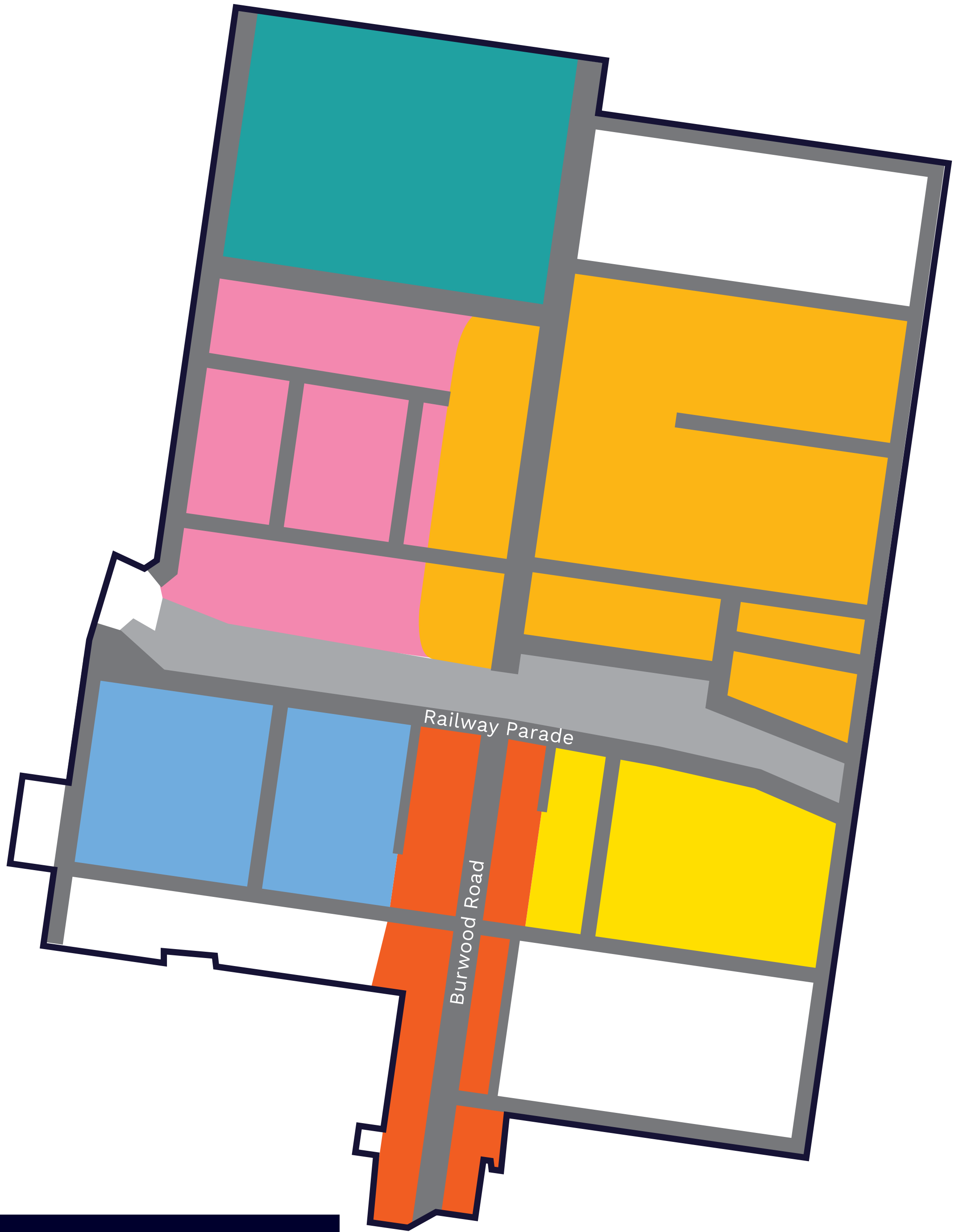
- Eat Street (Chinatown)
- Cultural Quarter
- Commercial Core
- Entertainment Central
- Education Hub
- Starry Civic Green

Community engagement will explore the following questions in relation to these sub-precincts:

- What is the story of this place?
- Where do we want to take it into the future?
- How can we keep making this a place for people after dark?
- What are the barriers impacting this space?

Each sub-precinct map also identifies major development projects that are **approved**, **under construction**, and **completed** within the immediate area.

Burwood's late night sub-precincts



Where else do you go for a night out in the Burwood Town Centre?

What else needs to be included in these boundaries?

Legend

- Burwood Road Eat Street
- Cultural Quarter
- Innovation Hub
- Entertainment Central
- Commercial Hub
- Starry Civic Green

Burwood Road Eat Street

A bustling hub of restaurants and late night dining

Burwood's Eat Street sub-precinct is the town centre's activity spine: leveraging Burwood's high street (Burwood Road) and most celebrated attraction, Burwood Chinatown. Centrally located near the intersection of Burwood Road and Railway Parade, the sub-precinct is well-activated and benefits from regular foot traffic from the nearby station. The sub-precinct is predominately characterised by dining venues offering Chinese cuisine, with a cluster of Middle Eastern businesses at the south end towards Church Street offering a more cosmopolitan experience. Clarendon Place is a successful night time destination with excellent fine-grain activation, permeability, and connectivity. Activations are granular and human-scaled, focused on outdoor dining and laneway interventions.

For Burwood Road Eat Street, tell us your thoughts on:

Would you like to see this transition into a 24 hour space?

What would you like to see on Burwood Road? (e.g. more outdoor dining)

Do you feel safe walking from the station at night?

Sub-precinct snapshot

Local businesses

What types of businesses characterise the sub-precinct?

- Chinese and Asian Fusion restaurants
- Middle Eastern and Mediterranean restaurants
- Cafés and bakeries
- Bubble tea and dessert stores
- Asian supermarkets and fresh food grocers

Public assets

What places are accessible to the public?

- Railway Square
- Clarendon Place
- Burwood Road parklets and pedestrianised spaces
- Wide pedestrian footpaths

Catalytic projects/placemaking initiatives

How is the sub-precinct changing?

- Burwood Place
- 121–133 Burwood Road Burwood Laneways
- Hornsey Lane Renewal (now renamed as Unity Place)
- Clarendon Place Activation
- Burwood Bounce Back

Key features/landmarks

What makes the sub-precinct unique?

- Burwood Chinatown
- Burwood Plaza
- Burwood Hotel

Entertainment Central

Our future hub of entertainment and excitement

Burwood's future entertainment sub-precinct is situated to the north of Burwood Train Station. It contains a prospective concentration of entertainment and recreational uses, with a potential new flagship entertainment building/theatre to be located along the south-east edge. Linkages to Westfield and independent retail shopping in the north are leveraged for their night time potential, including entertainment uses such as Event Cinemas. Transformational mixed-use residential developments such as Burwood RSL will draw a consistent crowd to the sub-precinct.

For Entertainment Central, tell us your thoughts on:

What would make you stay out later in the sub-precinct?

Would you like to see more public spaces converted such as the Deane Street precinct?

Sub-precinct snapshot

Local businesses

What types of businesses characterise the sub-precinct?

- Fast food
- Chinese and Asian Fusion restaurants
- Shopping retail

Public assets

What places are accessible to the public?

- Deane Street
- Victoria Street Plaza
- Burwood Road parklets and pedestrianised spaces
- Wide pedestrian footpaths

Catalytic projects/placemaking initiatives

How is the sub-precinct changing?

- Uniting Church Developments
- Burwood RSL
- Victoria Place
- Deane Street Precinct Transformation

Key features/landmarks

What makes the sub-precinct unique?

- Westfield Burwood
- Uniting Church
- Event Cinemas Burwood

Cultural Quarter
An intimate space for gathering and connection

Burwood's Cultural Quarter celebrates existing community assets and future cultural projects located within the sub-precinct. The co-location of Burwood Library with the future Burwood Place and Burwood Urban Park, Arts and Cultural Centre will create vibrant cultural synergies that redefine Burwood as a cultural destination. Emerald Square is a catalyst project that offers great potential for the ongoing activation of Unity Place – not just a through-site link, but a culturally interesting place to stay, rest, and be inspired.

It is however important to note the upcoming disruption to the sub-precinct through the construction of Burwood Plaza. While this development will substantially transform the urban fabric of the Burwood Town Centre, it is important to explore how short-term impacts can be mitigated for local businesses.

Sub-precinct snapshot

Local businesses

What types of businesses characterise the sub-precinct?

- Cafés and casual dining

Public assets

What places are accessible to the public?

- Unity Place
- Burwood Library
- Community Hub Meeting Rooms
- Emerald Square Laneways

Catalytic projects/placemaking initiatives

How is the sub-precinct changing?

- Burwood Place
- Burwood Urban Park, Arts and Cultural Centre
- Unity Place Activation

Key features/landmarks

What makes the sub-precinct unique?

- Burwood Library
- Burwood Council Chambers
- Unity Place
- Department of Communities & Justice
- Burwood Public School

For Cultural Quarter,
tell us your thoughts on:

How can businesses be supported while Burwood Place is constructed?

How can we better connect the cultural and entertainment facilities to the Town Centre?

Commercial Hub

A leafy space to work and play

Burwood's commercial sub-precinct transforms existing high levels of office space vacancy west of Burwood Road into a vibrant retail and work hub. Elsie Street generates the majority of business activity and its leafy backdrop makes the sub-precinct an amenable place. Connections to retail and commercial business along Burwood Road and Westfield are leveraged.

Sub-precinct snapshot

Local businesses

What types of businesses characterise the sub-precinct?

- Doctors and medical specialists
- Small businesses and essential services

Public assets

What places are accessible to the public?

- Gateway Business College
- George Street Carpark

Catalytic projects/placemaking initiatives

How is the sub-precinct changing?

- Victoria Street Plaza

Key features/landmarks

What makes the sub-precinct unique?

- High office vacancy
- Elsie Street – main commercial strip

For Commercial Hub, tell us your thoughts on:

Do you feel safe in this space at night?

Would you like to see more parklets and similar activations trialed?

Innovation Hub
A place to learn and grow

Burwood's emerging innovation hub leverages the cluster of existing learning centres, colleges, and community assets to the south-east of the train station. The prospect of a university campus or named business locating its headquarters within this sub-precinct could contribute to the destinational qualities of the town centre, particularly for young professionals and tertiary students. The mixed residential-commercial high-rise earmarked for the north and south edges of this sub-precinct will also position Burwood as a desirable play to live, learn, and work, with education at its core. With world-class assets, a more targeted 'health and education' identity for the sub-precinct may be explored to generate additional employment and visitor attraction, similar to Randwick Health and Education Precinct.

Sub-precinct snapshot

Local businesses

What types of businesses characterise the sub-precinct?

- Schools, colleges and learning centres
- Community support organisations

Public assets

What places are accessible to the public?

- Woodstock Community Centre

Catalytic projects/placemaking initiatives

How is the sub-precinct changing?

- BA

Key features/landmarks

What makes the sub-precinct unique?

- Burwood Police Station
- Burwood Court House
- Sydney School of Technology
- Sydney Guzheng School

For Innovation Hub,
tell us your thoughts on:

What facilities do we need to support our students?

Would you like to see more parklets and similar activations trialed?

Starry Civic Green
A place to relax

Burwood's starry civic green precinct is anchored by Burwood Park – a valuable asset of Burwood Town Centre used by residents and visitors alike. Burwood Park contains several existing types of spatially-distributed activity, with Tai Chi within the north-west field, tennis courts to the south, and a central rotunda, pavilion, and community centre. Opportunity exists to safely extend park use and activation by night, staging family-friendly pop-up events, such as food trucks, night markets, or outdoor cinema.

Sub-precinct snapshot

Local businesses

What types of businesses characterise the sub-precinct?

- Cafés and park facilities

Public assets

What places are accessible to the public?

- Burwood Park

Catalytic projects/placemaking initiatives

How is the sub-precinct changing?

- Burwood Park – Nature Play and Sensory Garden

Key features/landmarks

What makes the sub-precinct unique?

- Burwood Park Community Centre
- Burwood Park Pavilion
- The Picnic Burwood Café
- Burwood Montessori Academy Child Care

For Starry Civic Green, tell us your thoughts on:

Would you attend events and activations that run later into the night?

What kinds of events and activations would you like to see at night?

How are we changing?

The Burwood Town Centre is undergoing an exciting and catalytic change. City-shaping projects and fine-grain interventions are transforming the experience of Burwood as a city and cultural destination. The following initiatives are driving this change.

The future of Burwood

The Burwood Town Centre is undergoing an exciting transformation, driven by a number of significant projects unfolding across the city. With **over 3,160* new dwellings** and **over 83,000sqm^ additional retail floorspace**, new developments will drive and sustain the night time economy of the Burwood Town Centre.

Key transformative projects

Emerald Square

Emerald Square is a mixed-use entertainment, food, and retail precinct located in the heart of Burwood. The development comprises a total of 210 residential apartments and over 7,400sqm of retail and commercial floor space. Across three levels, residents and visitors are spoilt for choice with places to eat, play, and shop across the 22 retailers operating within the precinct. The project focuses on creating inclusive spaces that connect and enrich the Burwood community, including public art installations and places to rest. Emerald Square trades from 9:00am to 11:00pm daily.

Additional residential dwellings: 210 units
Additional retail and commercial floorspace: 7,400sqm

^ *Figure based on the retail floorspace figures mentioned within this report only*
* *Figure based on total new dwellings planned for the Town Centre*

Victoria Place Burwood

Victoria Place is a 31-storey mixed-use development with commercial, retail, and office tenancies. Located on Victoria Street, the multi-dimensional precinct will provide residents and visitors with an array of dining and retail options, featuring an internal walking link to seamlessly connect residents from Victoria Street, through to George Street, and to Burwood Station.

Additional residential dwellings: 187 units
Additional retail floorspace: 6,296sqm

Club Burwood

Club Burwood is an exciting new entertainment venue for central Burwood. The $250 million development comprises a variety of restaurants, cafés and bars, conference centre, gaming area, 900-seat theatre, and rooftop garden. The project will also include 1,250 additional carparking spaces and has concept approval for a hotel.

Additional residential dwellings: N/A
Additional retail floorspace: 42,000sqm

Burwood Urban Park, Arts and Cultural Centre

The Burwood Urban Park, Arts and Cultural Centre is a project that will transform the existing carpark outside Burwood Library and Community Hub into a thriving cultural space. This Council initiative will establish a vibrantly dynamic civic and cultural precinct that celebrates the unique diversity of cultures in Burwood. Importantly, it responds to the growth of Burwood and the needs for more public open space, and community and cultural facilities: currently there are no dedicated arts and cultural facilities in the Burwood LGA. The project will deliver:

- A new arts and cultural centre, including dedicated performance and rehearsal spaces, studio space, community lounge, flexible multipurpose spaces and café
- A new urban park including a public plaza, sloping green lawn area, trees, landscaping, interactive water play features and public art
- An underground public car park

Additional residential dwellings: N/A
Additional community floorspace: 1,875sqm

Burwood Place – Holdmark

Burwood Place is a $650 million revitalisation precinct within The Burwood Town Centre. This city-shaping development will comprise a variety of uses, including retail, cinema, childcare, medical centre, office space, and residential apartments. Burwood Place will become a meeting place; local public art and new public space will be a large part of the site's public domain, encouraging creative and artistic expression within the precinct.

Additional residential dwellings: 1,041 units
Additional retail floorspace: 25,434sqm

Local-scale initiatives

Complementing the key city-shaping projects occurring across The Burwood Town Centre, a multitude of small-scale placemaking initiatives are also unfolding at a local scale – and with a big impact.

These 'softer' placemaking activations take various forms, from pop-up events to lasting public domain improvements, and seek to test the viability of a range of interventions. Importantly, they enhance the 'harder' physical infrastructure projects that continue to redefine the Burwood LGA as a desirable place to live, visit, and play. Combined, these transformational projects and fine-grain initiatives will position Burwood as a true destination.

The following page provides an overview of the key placemaking initiatives within The Burwood Town Centre. The nature of these initiatives, including their delivery and funding mechanism, can be understood via the key to the right:

CATEGORY

Event

Laneway Renewal

Public Domain Improvement

Business Capacity Building

Public Art

DELIVERY

Council

Business

Community

FUNDING

$

$10,000 – $100,000

$$

$100,000 – $500,000

$$$

$500,000+

Burwood Laneways

Program: Summer Nights Fund

Burwood Laneways, held on Saturday 2 April 2022, was a unique collaboration between Council, Emerald Square, and Burwood Chinatown. The activation involved 30 local pop-up stalls along the laneways of Burwood (Clarendon Place, Emerald Lane, Unity Place), comprising markets, dining, live performances, roaming entertainment, and food trucks.

$

Hornsey Lane Renewal

Program: Places to Love

The Hornsey Lane (now, renamed as Unity Place) renewal project supported Council's strategic plan for a network of activated pedestrian laneways. The project involved large murals, landscaping, smart poles, and seating along Hornsey Lane – an iconic laneway adjacent to Burwood's Library and Community Hub.

Deane Street Precinct Transformation

Program: Streets as Shared Spaces Round 2

The Deane Street Precinct Transformation involved the trial closure of Deane Street (from Burwood Road to Youth Lane, creating a new public space with seating, space for outdoor dining, and community activities.

Burwood Bus Depot Mural

Program: Parramatta Road Urban Amenity Improvement Program

In partnership with Transport for NSW and Transit Systems West, Council has engaged a Sydney-based artist to design and install a mural on the front façade of Burwood Bus Depot facing Parramatta Road. This highly visible mural will shape one of Sydney's most significant corridors – a major gateway into the Burwood LGA.

Burwood Park – Nature Play and Sensory Garden

Program: Public Space Legacy Program

A new nature play facility for teenagers, including a new sensory garden for quiet introspection and to connect people to nature, and upgrades to the pond to improve opportunities to be close to the cooling and calming influence of water.

Unity Place Activation

Program: Festival of Place Open Streets Program

Unity Place is a new public space in the heart of Burwood. To celebrate its renaming (formerly Hornsey Lane), a day/night community event was held on Saturday 17 April 2021, featuring light installations, outdoor library activities, live music, and a night market of food trucks.

$

And many more!

Including Burwood's street tree planting program, street tree inventory, alfresco dining locations, bounce back grants program.

Projects & initiatives map

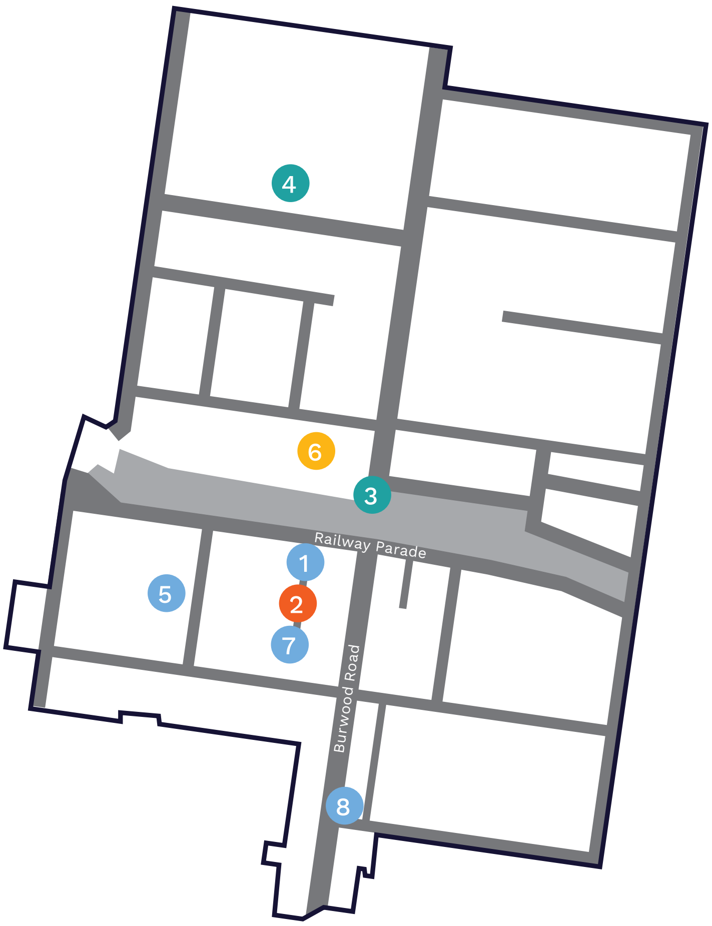
Legend

- Event
- Laneway Renewal
- Public Domain Improvement
- Business Capacity Building

Initiative

1 Burwood Laneways
2 Hornsey Lane Renewal
3 Deane Street Precinct Transformation
4 Burwood Park – Nature Play and Sensory Garden
5 Unity Place Activation
6 Victoria Street Parklet
7 Clarendon Place Activation
8 Burwood Bounce Back

+ initatives not mapped/multiple locations
9 Burwood's 500 Magnificent Trees
10 Street Tree Inventory
11 Alfresco dining locations
12 Shopfront improvement program 2022-23



Recommendations and next steps

> Sydney's on a growth trajectory, and it's got real opportunity now to plan for its life at night and an opportunity to be proactive rather than reactive.
>
> Amy Lamé, Night Czar for City of London

SWOT analysis

Strengths	Weaknesses
• Significant urban renewal and public investment into infrastructure, spurring significant social and economic change across the centre • Committed and long term public and private investment underway (Burwood North Metro Station, WestInvest Funding, Burwood Place, Club Burwood • Authenticity and uniqueness of Burwood – International and domestic visitors often go to The Rocks, Opera House, flagship destinations – Burwood as an alternative destination to the Sydney CBD – Corporate Sydney experience vs authentic Burwood experience – not corporate e.g. Marrickville, Newtown, Enmore • A well-established and renowned dining and late night food scene that is growing • Strong governance and direction from all levels of Council for the growth of the night time economy, and private partners who are excited to collaborate and improve the space • A number of existing, under construction and approved public spaces and public domain upgrades that improves safety and amenity	• The strong reputation of the centre has not translated outside of migrant communities • A large portion of businesses stop trading at 10pm, making the centre feel empty after having your meal • There is limited economic diversity, with the bulk of the night time economy being restaurants • Quality of visitor experience is mixed, with footpaths, lighting, public realm varying substantially across the centre • Lots of temporary activation and places being created but some have struggled to transition to permanent features and solutions • Quality of offer is not diverse, with limited high end restaurants and retail in the centre • Limited quality short term accommodation • Limited employment opportunities
Opportunities	**Threats**
• Capitalise on the rapid urban renewal and change to deliver an active and vibrant night time economy • Develop Burwood into a true destination, and become a larger player in the Neon Grid of Sydney • Draw in large cultural and community events to leverage the existing restaurant and retail basis • Leverage and attract in visitors to Sydney Olympic Park events to stay and/or visit after events (e.g. dinner in Burwood after a show) • Leverage our unique and "Authentic" identity to patron international and domestic visitors from Western Sydney Airport • Utilise and program of public open space for pop-up short term businesses • Catalyst for license to play – testing ground of online businesses and pop-up markets to move into brick and mortar setting e.g. temp support, education on grants, shorter length tenancy • Capture in audiences at Burwood on the way to/from CBD & Parramatta • Ability to position to capture global connectivity/attention • Expand of health and knowledge services to provide a larger customer basis and address changing demands from consumers • Increased late night opening hours	• Rents skyrocketing - businesses going back to Sydney CBD because it's cheaper • Don't want to lose out on family run and small businesses • Lacking small independent retail – compare point of small independent retail • Westfield needs to be complementary to the centre • Limited availability and low vacancy rates driving high rents • Lack of 60-150m2, only vacancy around 30m2 • Expectations of owners, want long-term tenants, which means start-ups miss out • Limited diversity in food and experiences offering (this is both a risk and a threat) • Expansion of licenced venues impacts 'family feel' • Absent or under-engaged landlords not investing in buildings / properties etc.

Planning control and policy

The night time economy is managed through a number of different mechanisms across Local Government and the NSW Government. Development applications for new late night venues must address various aspects of Council's local planning policy, alongside other considerations by various policy and legislation from the NSW Government.

It is important that Council can find a balance between encouraging the growth of the night time economy, while managing potential amenity impacts from new venues on the centre and local residents.

The below identifies the key sections that monitor and manage the night time economy within the Burwood Local Environmental Plan 2012 (LEP) and Burwood Development Control Plan 2022 (DCP).

Burwood Local Environmental Plan 2012

Section(s)	Observations
Land Use Table – B4 Mixed Use	The B4 Mixed Use zone is currently applied to all properties located within the study area of this project. It is also includes the core commercial areas of the: • Burwood Town Centre; • Strathfield Town Centre; and, • Burwood North Precinct. The current permissible uses do not unreasonably prohibit the types of late night venues council and the local business community are seeking to grow within each town centre. There are opportunities for Council to consider adding additional objectives to the zone to further encourage active ground floor uses such as those associated with the night time economy.
Part 6 – Additional local provisions	There are no current additional local provisions that directly relate to the night time economy.

Burwood Local Environmental Plan 2012

Section(s)	Observations
Section 3.2 – General Building Design Controls in Centres and Corridors **Section 3.3 – Areas Based Controls – Burwood Town Centre and Burwood Road North** **Section 3.11 – Public Domain and Amenity**	The controls contained within the DCP are generally encouraging of street front activation and late night activities. Some minor additional considerations are listed below: • Section 3.2.3 – Council could consider specific lighting controls in high foot-traffic areas to increase visibility and safety at night • Section 3.2.14 – As the centre evolves from a town to a city centre, Council may need to consider how acoustic amenity is considered in new developments, including external fixtures and façade finishes There are no current additional local provisions that directly relate to the night time economy.

Council-led late night specific planning controls

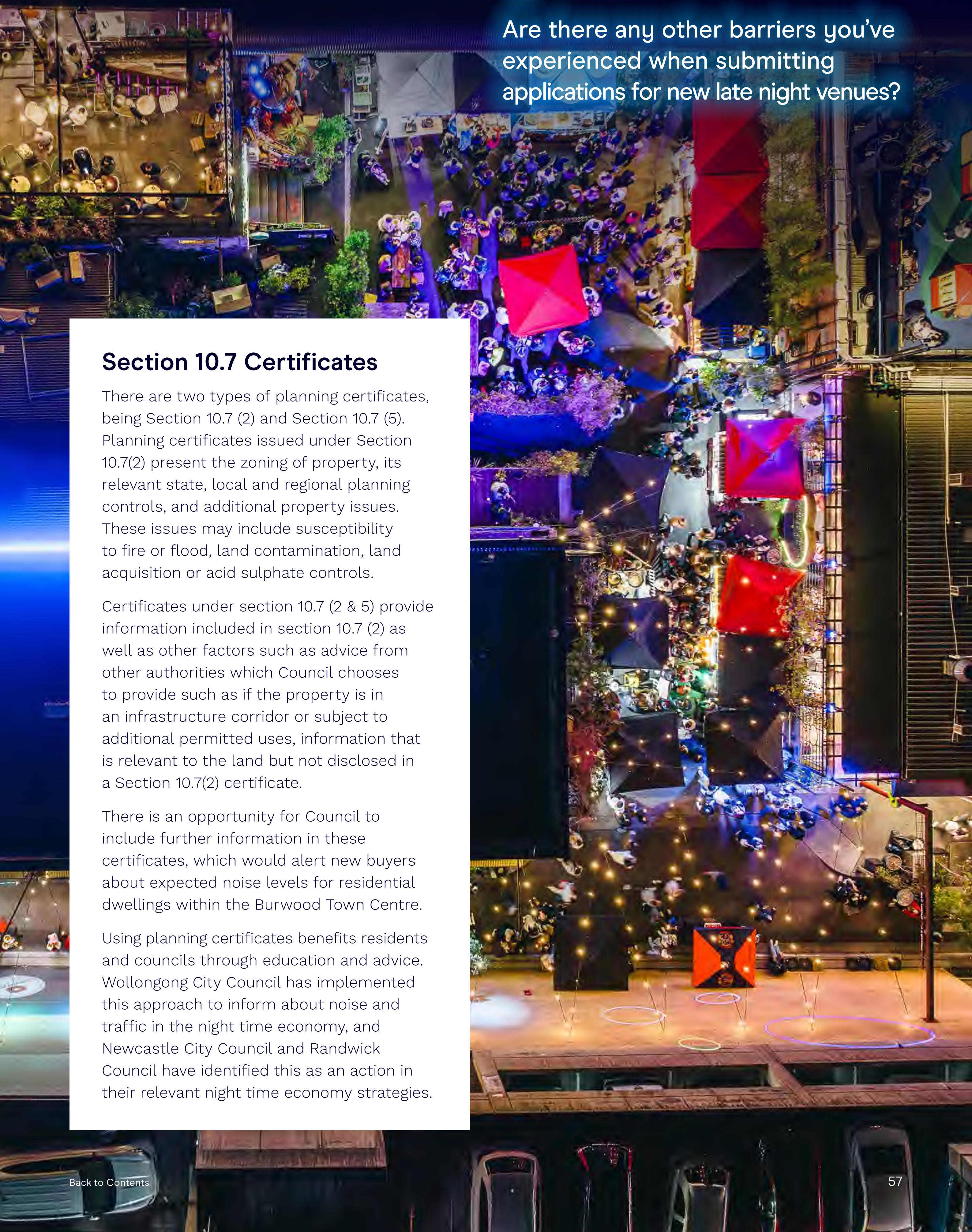
There are a number of additional new planning controls that could be considered for the Burwood Town Centre which may assist in increasing the vibrancy of its night time economy. A list of potential controls and local policy has been outlined below:

Planning Control	Description	Outcome
Low Impact Venue Assessment	Not all late night venues will have a significant impact on the amenity and safety of the town centre. A number of councils across NSW are exploring the implementation of low impact venue assessment frameworks to enable a simplified approval pathway for venues which will have limited or no impact on the local amenity of a centre, reducing costs and risks for new and innovative business types. A similar planning framework could be explored for the Burwood Town Centre	Streamlining processes
Special Entertainment Precincts	The NSW Department of Planning & Environment has recently implemented 'Special Entertainment Precincts' (SEP) through the Local Government Act 1993. A SEP can be used to embed 'agent of change' principles into a centre, recognising the role and function it plays within the broader Greater Sydney context. Council may wish to explore how a SEP could benefit the Burwood Town Centre	Agent of change
Public Domain Plans	The Burwood Town Centre is home to a number of bustling sub-precincts, each with their own unique challenges and opportunities. Council may wish to explore the development of a Public Domain Plan to help establish unique identities of spaces, and address areas that are perceived to be unsafe	Place uniqueness and Public Domain Plan
Section 10.7 Certificates	A core responsibility in the growth of the night time economy is to manage noise and land use conflicts. The current B4 Mixed Use zoning will result in the substantial development of mixed retail and residential buildings within key late night precincts. The use of Section 10.7 certificates can assist in managing the expectations of new residents to the area for the impacts of noise generated from late night venues.	Managing expectations

External planning changes

A number of new policies and external changes have been made within the Night Time Economy space by the NSW Government and other state agencies. The key changes are identified below:

Planning Control	Description	Outcome
Exempt and Complying Development (FUN SEPP)	In 2022, the Fun SEPP was implemented under reforms to the State Environmental Planning Policy (Exempt and Complying Development Codes) 2008 (Codes SEPP). These changes have been designed to enable more live music, arts venues and artisan food and drink venues to centres across NSW. These changes help support small businesses in delivering a 24-hour economy that is vibrant, diverse, inclusive and safe. Two of the key changes enabled through the Fun SEPP are: • Exempt development provisions for outdoor and alfresco dining on the footpath for pubs and small bars • Complying development pathway enabling retail premises' change of use to small live music or arts venues	Streamlining processes



Are there any other barriers you've experienced when submitting applications for new late night venues?

Section 10.7 Certificates

There are two types of planning certificates, being Section 10.7 (2) and Section 10.7 (5). Planning certificates issued under Section 10.7(2) present the zoning of property, its relevant state, local and regional planning controls, and additional property issues. These issues may include susceptibility to fire or flood, land contamination, land acquisition or acid sulphate controls.

Certificates under section 10.7 (2 & 5) provide information included in section 10.7 (2) as well as other factors such as advice from other authorities which Council chooses to provide such as if the property is in an infrastructure corridor or subject to additional permitted uses, information that is relevant to the land but not disclosed in a Section 10.7(2) certificate.

There is an opportunity for Council to include further information in these certificates, which would alert new buyers about expected noise levels for residential dwellings within the Burwood Town Centre.

Using planning certificates benefits residents and councils through education and advice. Wollongong City Council has implemented this approach to inform about noise and traffic in the night time economy, and Newcastle City Council and Randwick Council have identified this as an action in their relevant night time economy strategies.

Where do we want to be?

The Burwood Town Centre has enormous potential to become a late night destination within Greater Sydney. A summary of the centre's key strengths and trends is outlined below.

A young, growing population

The Burwood Town Centre is fortunate to receive continued population growth, in particular a large proportion of international students which drive demand for late night offerings.

Strong existing late night scene

We are home to a thriving hub of restaurants and food activities. This is highly unique in the Greater Sydney context, and should be celebrated and broadened to the larger Sydney audience.

Urban renewal

The construction of new buildings is allowing for a number of legacy public domain issues to be addressed. This is an enormous opportunity to truly make a centre for people.

Building on momentum

The night time economy has received recognition as a core component of Greater Sydney's economy. Now is the time to seize the momentum to become a regional destination.

For our local business:

Would you be interested in contributing to a larger branding and marketing of Burwood?

What can Council do to better support you to trade later?

Barrier identification

The Burwood Town Centre is a highly successful example of the organic growth of a local night time economy. Despite its success, there are a number of barriers that are preventing the centre from reaching its true potential as a late night destination within Greater Sydney.

Background research

The following barriers have been identified as part of the background research undertaken for this discussion paper.

Marketing and branding

Burwood has a strong food and restaurant scene and is immensely popular within south Asian diaspora in Greater Sydney. This popularity has not translated to other communities within Greater Sydney. Examples like Lakemba Ramadan Nights or Harris Park have helped establish other locations within the Greater Sydney lexicon. Both Council and local businesses should explore how the centre can be better marketed to Sydney's residents. This marketing will also allow Burwood to link into larger regional events such as Sydney Fringe or the Sydney Comedy Festival, provided the other barriers identified have been addressed.

Limited economic diversity

The Burwood Town Centre has a local and regional reputation as a hub of restaurants and food offerings, driven largely by Burwood Chinatown and nearby locations such as Emerald Square and Burwood Road. The current offering is a great strength that should be capitalised on. A diversity in both the offering from businesses and the quality in offer is a barrier to building on this reputation to bring in a broader audience.

Activity drop-offs (after 10pm)

The Burwood Town Centre has a noticeable drop-off of business activity and pedestrian movement after 10pm. This activity drop off has a cyclical impact on the centre, where businesses don't feel there is enough demand to open later, and pedestrians won't come out as it feels empty after 10pm. A few key businesses opening up past 10pm can have a catalytic effect and be a demonstration to other businesses.

Place-based challenges

Each sub-precinct has a combination of its own unique place-based challenges. These barriers are primarily in the form of poor lighting or safety in key locations or in the connecting areas between transport nodes and activity. These fine grain changes are critical in helping improve perceptions of the area and encourage both businesses and visitors to stay in the centre after dark.

Lack of creative and cultural draw-cards

Burwood Chinatown is acting as both a cultural attractor and an eat street destination. The venue has played a critical role in helping Burwood grow its reputation to the level it is now. Its ability to draw additional audiences and new visitors is limited by its size. To continue building on the successful reputation, additional creative or cultural drawcards are likely needed to help establish the area as a destination within Greater Sydney. A new venue should be a complementary use that can provide reciprocal benefits to Chinatown. This could include venues like eSports arenas, theatres or similar.

Limited 'spill out' spaces

The town centre currently has limited public open space within proximity to the existing late night activity on Burwood Road and Chinatown, preventing businesses and other external operators to open up outdoor stands without substantial road closure, or impacting pedestrian flows to and from the station. Pedestrianisation of space such as Deane Street have made significant contributions to addressing this issue. This barrier will also likely be addressed once Burwood Plaza is constructed.

CASE STUDY: Economic Spillover of Arts, Cultural and Creative Venues

The value of Cultural and Arts Venues cannot be underestimated, acting as economic catalysts when appropriately integrated with nearby restaurants and local spending opportunities. In a 2015 study conducted by Americans for the Arts, findings indicate that patrons who attended an arts event generate significant economic spillover for adjoining businesses and venues.

The research revealed that on average, each attendee spends an additional $31.47 per person, per event, excluding the admission fee. Furthermore, the study, known as AEP5, demonstrates that 34 percent of attendees came from outside the county where the arts event was held. These non-local visitors spent more than twice as much as the local attendees, with an average expenditure of $47.57 compared to $23.44. The primary motivation for these visitors was attending the arts event, as indicated by 69 percent of these individuals. These findings highlight the significance of a vibrant arts community, which not only encourages local residents to spend their discretionary income locally but also attracts visitors who contribute to the local economy by spending money and supporting local businesses.

42 Arts & Economic Prosperity 5, American for the Arts 2015
43 Arts & Economic Prosperity 5, American for the Arts 2015

Community Consultation

Our community and local businesses are the driving force behind our night time economy. To ensure we're building a night time that works for our residents, Council has been undertaking a thorough round of community consultation as part of this Discussion Paper. Over the past few months, Council has undertaken:

- **Online survey**
- **Online Ideas Wall**
- **2 x Business Door Knocks through Burwood Town Centre**
- **3 x Late Night Pop-ups between 6pm to 11pm**
- **Social Media Posts**
- **2 x Late Night Intercept Surveys**
- **A workshop with existing businesses**
- **Multiple meetings with key local and external stakeholders**

The outcomes of this engagement will be used in the development of the Burwood After Dark Strategy and future Night Time Economy Projects.

Recommendations

The night time economy of the Burwood Town Centre is complex, and requires an equally nuanced response to help ensure it can grow to its full potential.

Town Centre Recommendations

The Burwood Town Centre has a strong existing night time economy. To summarise the research and findings of this discussion paper, the following is recommended:

- Explore opportunities for new creative and cultural venues within the town centre
- Investigate opportunities to expand hotel accommodation as a complement to existing short term private rentals to entice overnight visitation in Burwood
- Investigate planning controls that help foster a vibrant night time economy
- Attract a diversity of new businesses, both in offering and quality to the town centre
- Explore how additional recreation and entertainment venues can be brought into the centre
- Undertake a marketing and branding exercise for the town centre
- Advocate for later public transport options
- Continue to foster a positive community perception of night time safety in Burwood through improved active and passive surveillance in new developments
- Support the integration of emerging modes of transport through trials (similar to those delivered by Transport for NSW), partnerships, collaboration, and a fit-for-purpose regulatory framework.

Sub-precinct Recommendations

In addition, there are a number of sub-precinct specific recommendations, that will require an ongoing place-based approach. The summary of this research

- Encourage businesses to open later strategically within their sub-precinct and cluster
- Address place-based safety concerns
- Undertake place-audits to understand key areas of concern and poor accessibility
- Encourage new local activations and events
- Encourage outdoor dining and use of the footpath by restaurants
- Leverage vacant or under-utilised spaces for night time activations or pop-up retail spaces.
- Enhance visibility and visual interest of retail lighting and signage through creative lighting and public art

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Appendix A

Economic and market analysis

Economic overview

The economic overview considers the economic conditions which impact night time economy and how Council can support businesses, leverage from competitive strengths and plan for a relatively uncertain period ahead.

Macro-economic conditions

- Short term challenges in 2023-2024 before an expected pick up in 2025
- Economic growth projected to be 1.5% in 2023 and 2024[1]

Household spending is split as there has been strong wage growth and additional savings, offset by higher interest rates and inflationary pressure

Business investment and public demand is starting to show positive signs after a slow period

An expected 12-24 months of economic uncertainty will mean short term support is critical to NTE Activity

Night time spending is more discretionary than day-time spending so providing an attractive experience will be critical to support the NTE

Macro-economic conditions for night time activity suggest an incoming period of trepidation with tentative spending and consumer confidence over the next 18-24 months. The short-term circumstances are uncertain as a result of global and national economic conditions. While the economy is generally stable, there is lingering apprehension about the state of the economy. This issue could impact discretionary spending on night time economy activities which have a higher discretionary propensity than certain daytime retail. The offset to the economic challenges are that unemployment has remained at historic lows around 3.5% and is not expected to change significantly in 2023 or late 2024[2].

The short term nervousness is expected to be followed by a smoother economy with increased economic growth and consumer confidence from 2025. In regards to planning for Burwood's night time economy, support during the next two years will be essential while the economy moves through a narrow path to projected increased stability and prosperity in 2025.

A full breakdown of economic conditions and impacts is outlined in the appendix.

Broader night time economy conditions

Quiet confidence of growing demand and diversity

Opportunity to further grow the NTE to an overall larger economic contributor

Ongoing residual challenges from COVID & Cost of living crisis

Changing demand away from alcohol related activity but very sensitive to location

A 2022 research project 'Measuring the Australian Night Time Economy 2020-21 In June 2021', outlined that Australia's Core NTE comprised 123,316 establishments. Most of these businesses belong to the Food sub-sector (63%), followed by Entertainment (30%) and Drink (7%)[3]. The distribution across these three sub-sectors has continued a trend towards more Food and Entertainment and fewer 'Drink' establishments.

This growth aligns well with Burwood which has a very diversified night time activity and a smaller proportion of drink related activities than other night time areas in Sydney and further afield. The

1 *Reserve Bank of Australia (2023) Monetary Statement – Economic Outlook May.*
2 *Reserve Bank of Australia (2023) Monetary Statement – Economic Outlook May.*

comparison of the case studies with regard to night time offer is in part 3 of this report.

Burwood which will be servicing an increasingly larger population based on new residential development and with a future cross-path between a suburban rail and metro station is located in a prime position to leverage a greater value out of the night time economy.

A detailed consideration of growing the nigh time economy is outlined in the Appendix.

Retail trends

There are a number of trends which will impact the night time market. This is based on a review of future retail strategies[4].

Curated centres

There is an expectation that centres for retail offer more than just the sum of their retail parts. There is an expectation for a sense of place, a vision for future place and more to attract visitors than just consumer spending. For Burwood, with so much diversity and a differentiated night time economy to many other centres, especially with regards to the entertainment options, this provides further opportunity to be integrated into the sense of place.

Innovative experience

In a period of tightened consumer spending, experiences that can't easily be replicated are in demand. For Burwood this presents an opportunity to leverage entertainment and dining options which may integrate with cultural activities or events such as the existing successful Lunar New Year.

Value-adding

This includes maximising revenue through retail businesses in addition to core business. This can range from sale or merchandise, special offers, increasing the takeaway options, running special events or partnering with other retailers[5]. This applies to many NTE businesses in Burwood and provides a way of possible additional revenue in a period of tight economic conditions.

Flexible leasing

There is increased demand from tenants for more flexible leasing arrangements which allow for more short-term retail ventures or the ability to sub-let spaces. For Burwood which has fairly tight rental vacancy, the market can be more selective, but it nonetheless provides a future possible consideration as more retail floorspace comes onto the market as Burwood North Metro becomes operational. Further, this could include leasing conditions that allow for potential day/night leasing where spaces may be operated by a separate night time tenant or whereby after hours trading is allowed on second storey retail premises which may otherwise be dominated commercial office activities.

Integrated place and built environment

There is an increasing acknowledgement of planning bricks and mortar retail, including NTE activities within a landscape and public domain plan. Examples could be identifying landscaping and public domain investment that seamlessly interfaces with retail and night time activity such as street frontages, planting, well lit soft surface areas which encourage human activity and permeable walkability between sub-precincts.

Environmentally sustainable & ethical

There is an increased expectation for business transparency regarding environmental sustainability and ethics, especially amongst younger consumers. This will become increasingly important in Burwood as more sustainability reporting is integrated into legislation and planning policy. NTE businesses could be supported in this transition, through options such as venue sharing with daytime activities[6].

3 Council of Capital City Lord Mayors (2022) Measuring the Australian Night Time Economy 2020-21, Ingenium Research.
4 KPMG (2022) Australian Retail Outlook 2022.
5 PWC (2023) February 2023 Global Consumer Insights Pulse Survey.
6 Bynder (2022) The Retail Report Trends and insights shaping the industry.

Market overview

The market conditions in Burwood consider both the prevailing property market conditions as well as the night time economy market as it currently stands. Overall, the market in Burwood is strong, elastic and well positioned for further growth. It is anchored by Burwood Railway Station and the future Burwood North Metro Station which provide strong foundations for retail and commercial space and connectivity. There is also a consideration of major retail trends and how this impacts the future NTE opportunities for Burwood.

Market conditions summary

Strong fundamental market position including low vacancy, healthy yields and competitive net face rents

Competitive upcoming position with further residential development and a new Metro Station to anchor Burwood Road at each end

Median Retail Net Face Rents ($/sqm) **$684**	Median Sale Price ($/sqm) **$14,100**
Vacant Properties (Sale & Lease) **29**	Approx Yields (%) **4.8%**

characterised by relatively low long term vacancy, steady transactions and rents which reflect the strong retail turnover densities and demand. The advertised median rental price ($/sqm per annum) is $684 at the time of writing. The low vacancy and steady yields lend to a market that is elastic and not prone to over-supply of retail space – something that impacts many other retail centres in Sydney[7].

Statistical analysis of night time & visitor economy

A statistical analysis of core night time activities has been undertaken for Burwood. The analysis used geo-referenced web scraping to record 112 core night time economy businesses. Using designations from the 'Sydney 24 our Economy Strategy', the core night time venues are divided into Entertainment, Drink Activities and Food Activities.

Entertainment

- Performing arts, music and culture
- Live sports and recreation activities
- Cinema
- Night clubs
- Galleries and cultural institutions

Food activities

- Cafés
- Restaurants
- Food trucks
- Food markets
- Food delivery services

Drink activities

- Bars
- Pubs
- Hotels
- Liquor retailing
- Wine tasting

112 total NTE core venues

52 total NTE support venues

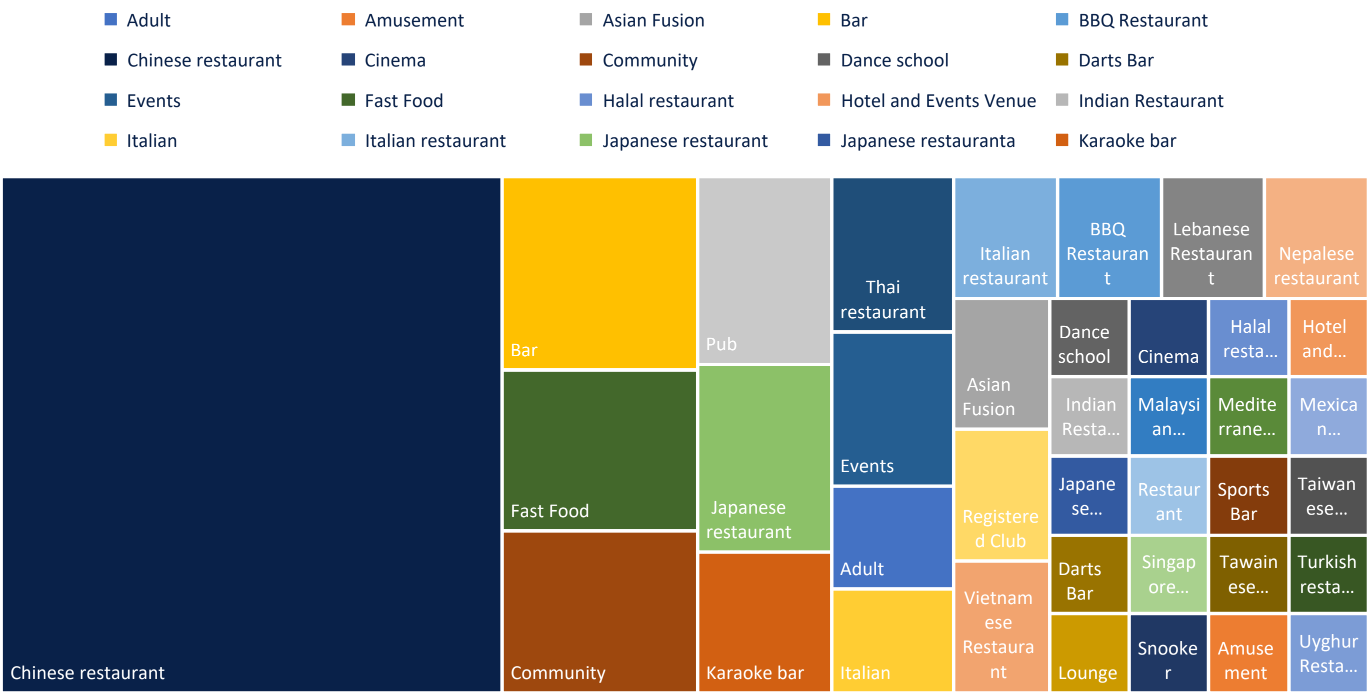
Using designations from the 'Sydney 24 our Economy Strategy', the mix of core night time activities in Burwood is shown below. Burwood has a unique mix with a considerable split of entertainment venues and a smaller number of 'drink activities' compared to other centres and case studies (see below).

20*	10	82
18%	**9%**	**73%**
30%	7%	63%

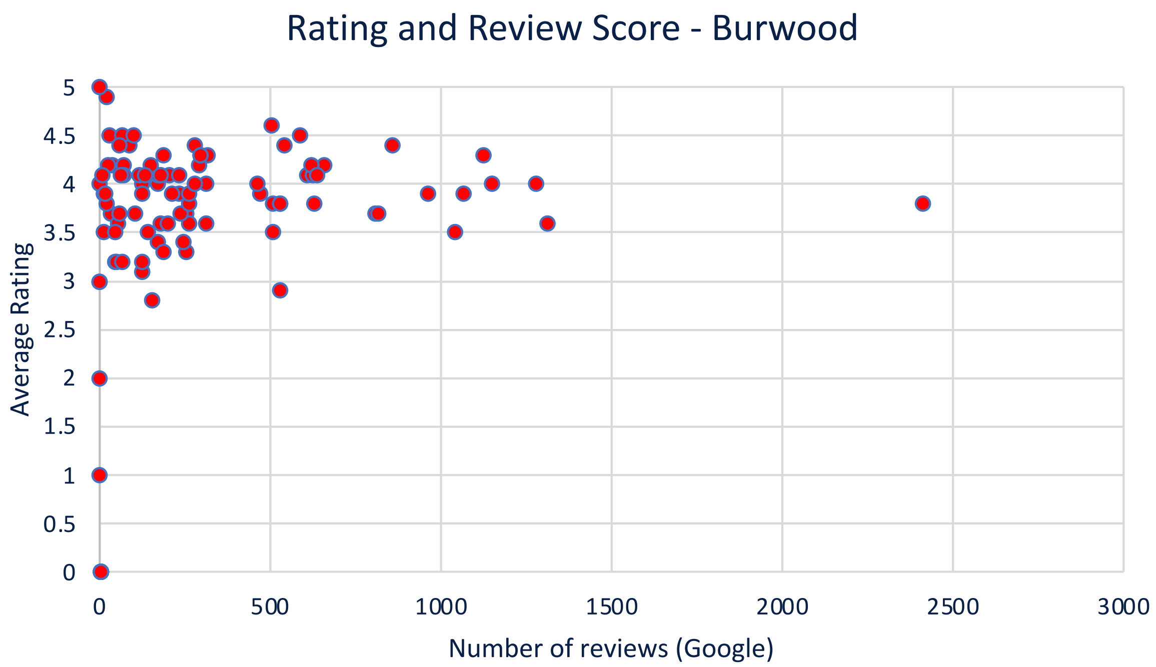
** This includes several community night time activities*

Breaking the venues down into-sub-categorisations, shows a remarkable diversity of different businesses and activities, with a major contribution of Chinese restaurants which comprise 36% of the total NTE businesses. There are 41 recorded Chinese Restaurants in Burwood as well as 17 other restaurants serving cuisine from Asia and many other NTE businesses.

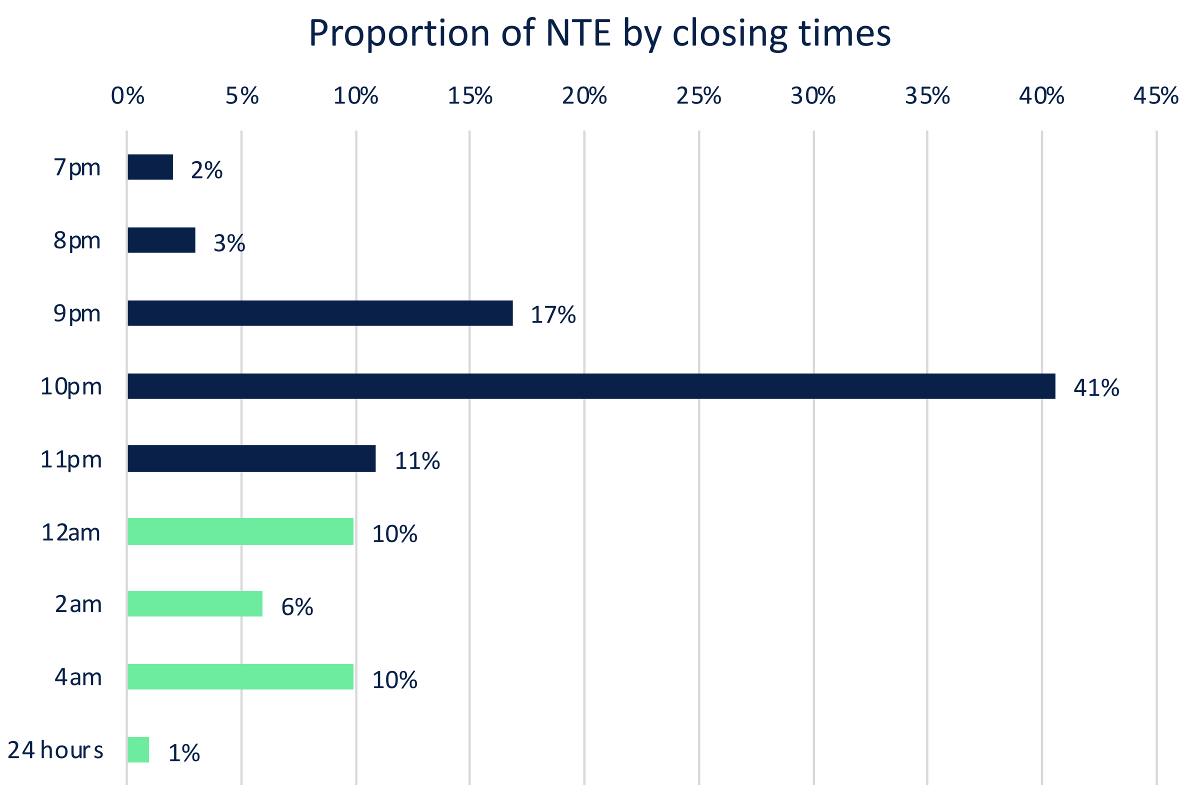
Sub-category mix in Burwood



An analysis of the reviews and ratings of each Burwood NTE business has been undertaken. It shows that the average review of NTE venues in Burwood is 3.84 based on an average of 293 reviews per NTE business. There were seven venues with 1,000 reviews or more and 25 venues with over 500 reviews. Overall, the analysis also showed a high proportion of new venues in Burwood, many of which have average reviews of over 4 and are out-performing more established venues. However, Burwood's review average is slightly under the average of other centres in the case studies included in this paper, particularly international comparisons. This is not a reflection of the offer of Burwood, as review preferences are subject to many local differencs.



Overall, the majority of NTE venues in Burwood close by 10pm, however over 27% shut at mid-night or after. A comparison of night time activities are outlined in the pages below.



How do we compare?

A comparative analysis of the night time economy in Burwood and five other night time economy destinations has been undertaken. The purpose is to understand the market factors, business composition and spread of activities as well as identify where Burwood's strengths and opportunities lie relative to other active night time destinations. It also provides a point of comparison for potential investment.

The five night time economy areas for the comparative analysis are:

- Haymarket (Chinatown) in Sydney
- Hurstville in Sydney
- Degraves Street/Flinders Lane in Melbourne
- Camden Town in London, United Kingdom
- Melrose/Fairfax in Los Angeles, United States
- Jalan Petaling in Kuala Lumpur, Malaysia

Haymarket (Chinatown), Sydney

Why Haymarket?

Haymarket is located in the southern part of Sydney's central business district. It accommodates Sydney's original Chinatown, as well as most of Thai Town and a diverse range of other uses. Being on the edge of Sydney's city centre, Haymarket leverages the large commercial and tourism markets which are focussed on the central business district (CBD), however has its own distinct locality and sense of place. While the location as part of the CBD opens it to a much larger market than Burwood, it also clouds official demarcation points between it and other sub-precincts and this means it now has a very diverse range of night time economic activities.

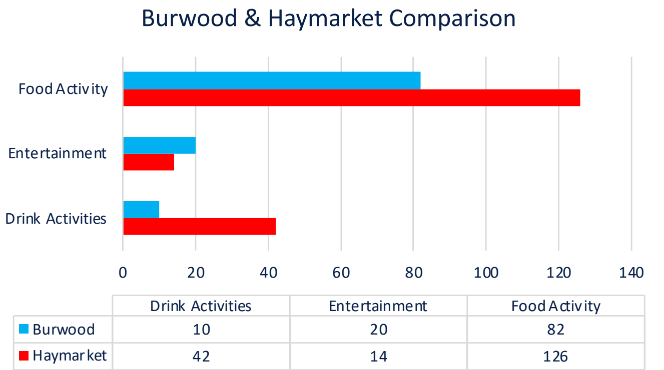
Summary

There were 182 core NTE Venues recorded in Haymarket. The split of uses is shown below. Almost 70% of venues were 'food activity', while only 8% of venues were classified as entertainment.

182 core NTE venues

	14	48	126
	8%	**23%**	**69%**
Burwood	18%	9%	73%
Australia	30%	7%	63%

A comparison between Burwood and Haymarket shows that while Burwood has slightly less night time economy venues overall, it actually has more entertainment venues than Haymarket, while still maintaining a higher proportion of food activity venues.



Economic and market characteristics

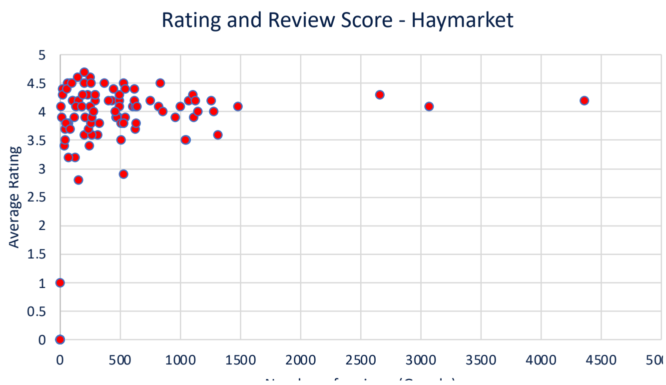
The market characteristics in Haymarket, show that it is a very high rent market with net face rents for retail and night time economy suitable spaces averaging around $1,100/sqm per annum. This is substantially higher than Burwood which is ~$700/sqm. This equates to rent being around 55-60% greater per sqm in Haymarket. As such, Burwood could be an attractive alternative to current or prospective tenants as well as potentially being able to offer lower pricing ranges for food.

	Net Face Rents ($/sqm)	Sale Price ($/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~$1,120	~$20,588	95	5.5%
Burwood	$684	$14,100	29	4.8%

Business longevity and review

The average restaurant score for Haymarket is 3.98, based on google reviews with the average review number per venue of 458. As the chart below shows however, there are three venues with over 2,500 reviews and 11 venues with over 1,000 reviews. This shows Haymarket is supported by some anchor institutions which can be important in creating a sense of place. Interestingly of the five venues with over 1,200 reviews only one is Chinese with two Malaysian and two Thai venues, showing the evolution of Haymarket. These venues are shown below.

- Mamak Haymarket (Malaysian)
- Ho Jiak Haymarket (Malaysian)
- Dodee Paidang Haymarket (Thai)
- Chat Thai (Thai)
- YX Mini Hot Pot Haymarket (Chinese)



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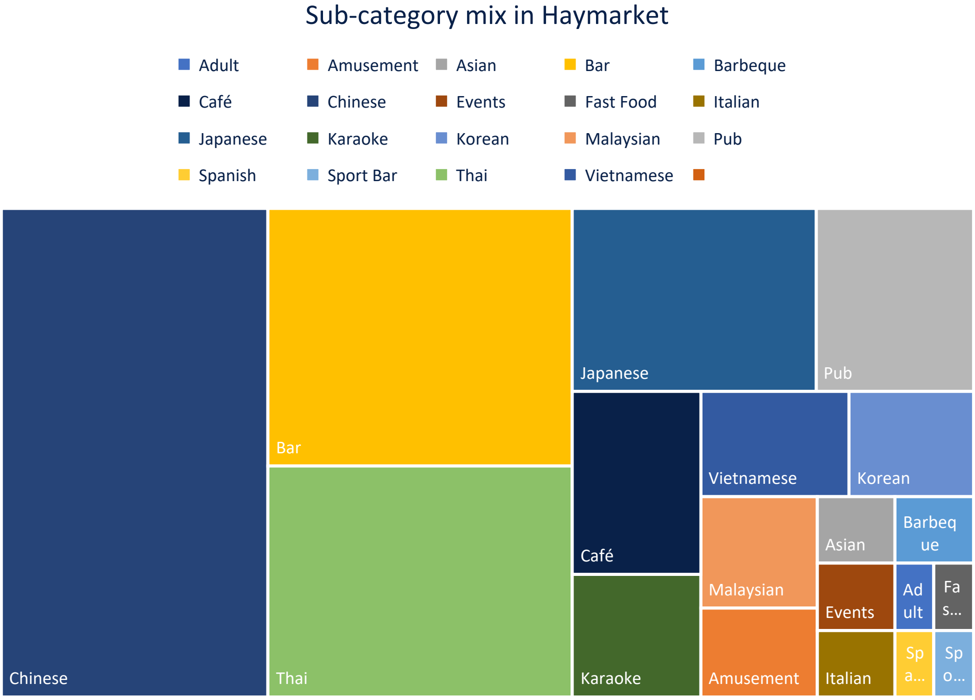
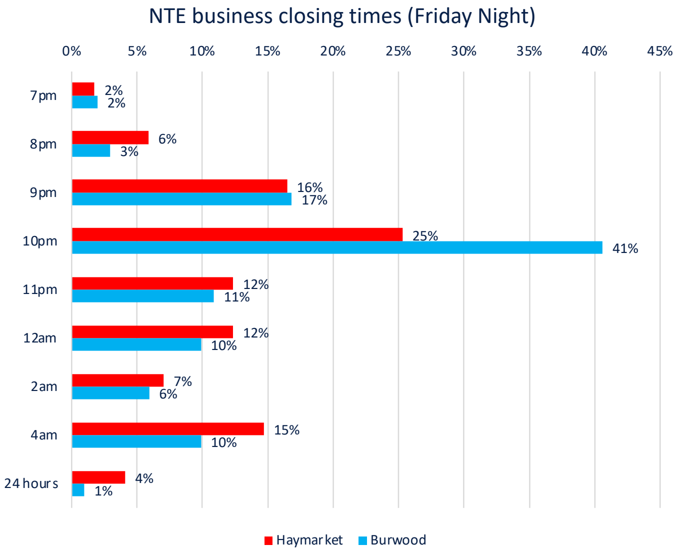
Business composition

The split in businesses in Haymarket reflects the evolution into a broader Asian precinct. While Chinese restaurants are still the largest single grouping, there is a noticeable mix of Thai, Japanese, Korean as well as bars and cafés trading at night. It has a much larger 'Drink Activity' focus than Burwood, and a less dominant Chinese Restaurant split.



Night time spread

The spread of night time activity shows that Haymarket is somewhat comparable to Burwood, however has a slightly later profile. While four out of 10 businesses in Burwood close between 9pm and 10pm, there is a more even split in Haymarket.



Lessons learned for Burwood

- Haymarket has evolved from its reputation and is still centred around Chinatown while now having a significant diversity of Asian night time activity and other options.
- Burwood in comparison to Haymarket is substantially more affordable in terms of net face rents which based on market availability are close to half what the rate asked for in Haymarket. This provides opportunities to consider pricing, attracting new businesses and being a centre for less established market players.
- The number of Chinese restaurants in Haymarket (50) is now similar to Burwood (41), however it is less dominant in Haymarket.
- The reviews for Haymarket are slightly higher than Burwood and it has some anchor institutions that provide a noticeable point of offer and sense of place. Leveraging well known anchors could be a way to support all businesses in Burwood.

Hurstville, Sydney

Why Hurstville?

Hurstville is a major retail centre and transport interchange that shares many similar characteristics to Burwood. It has a busy railway station, a large independent dining scene, as well as a big box Westfield shopping centre within immediate proximity to the railway station. Hurstville is also known as a centre of Chinese and other Asian dining. Hurstville is a useful point of comparison as it is also a suburban centre and its successes and challenges can help inform NTE considerations for Burwood.

Summary

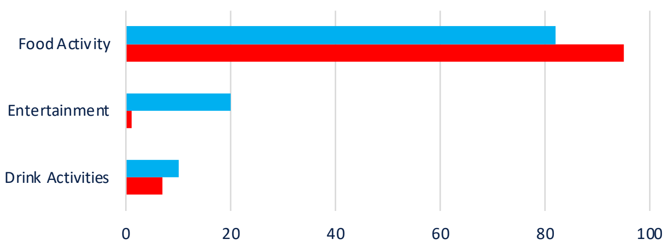
There were 103 core NTE Venues recorded in Hurstville. The split of uses is shown below. Over 90% of venues were identified as a 'food activity'.

103 core NTE venues

	1	7	95
	1%	**7%**	**92%**
Burwood	18%	9%	73%
Australia	30%	7%	63%

A comparison between Burwood and Hurstville shows that Burwood has slightly more night time economy venues overall as well as a broader mixture of NTE uses, especially 'Entertainment'.

Burwood & Hurstvlle Comparison



	Drink Activities	Entertainment	Food Activity
Burwood	10	20	82
Hurstville	7	1	95

Economic and market characteristics

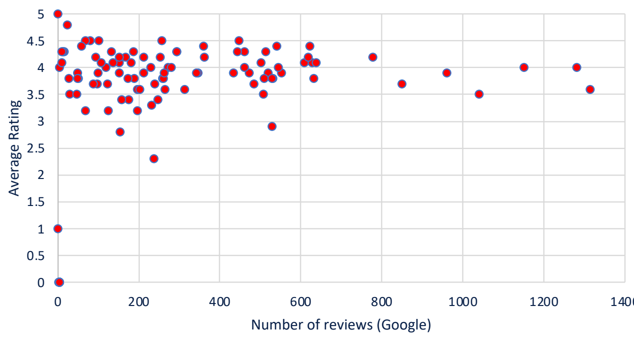
The market characteristics in Hurstville, show that it has a comparable rental market with net face rents for retail and night time economy suitable spaces averaging around the $600-$700/sqm range. There are slightly more vacant properties in Hurstville but overall the market conditions are similar. The only notable difference is that capital transaction prices are substantially higher in Burwood which could indicate there is more value in retail/NTE space as a longer term asset. The offset to higher capital prices is reflected in lower yields, however the enduring attractiveness of Burwood retail is reflected in the low vacancy rate. There are approximately 45 vacant retail/NTE Suitable properties in Hurstville, which while higher than Burwood, is not likely to be more than 3-6% of total stock, so still a stable and low-side figure.

	Net Face Rents ($/sqm)	Sale Price ($/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~$632	~$10,000	45	6.3%
Burwood	$684	$14,100	29	4.8%

Business longevity and review

The average restaurant score for Hurstville is 3.90, based on google reviews with the average review number of 280. Again, this is very similar to Burwood. As the chart below shows however, overall in Hurstville, there are fewer venues than Burwood with over 500 reviews and a slightly lower scoring profile overall. Both areas do have a lower ratings profile than some of the other centres. This does not mean however this reflects the quality or popularity of the offer, more it is noticeable as local markets may be subject to higher standards.

Rating and Review Score - Hurstville



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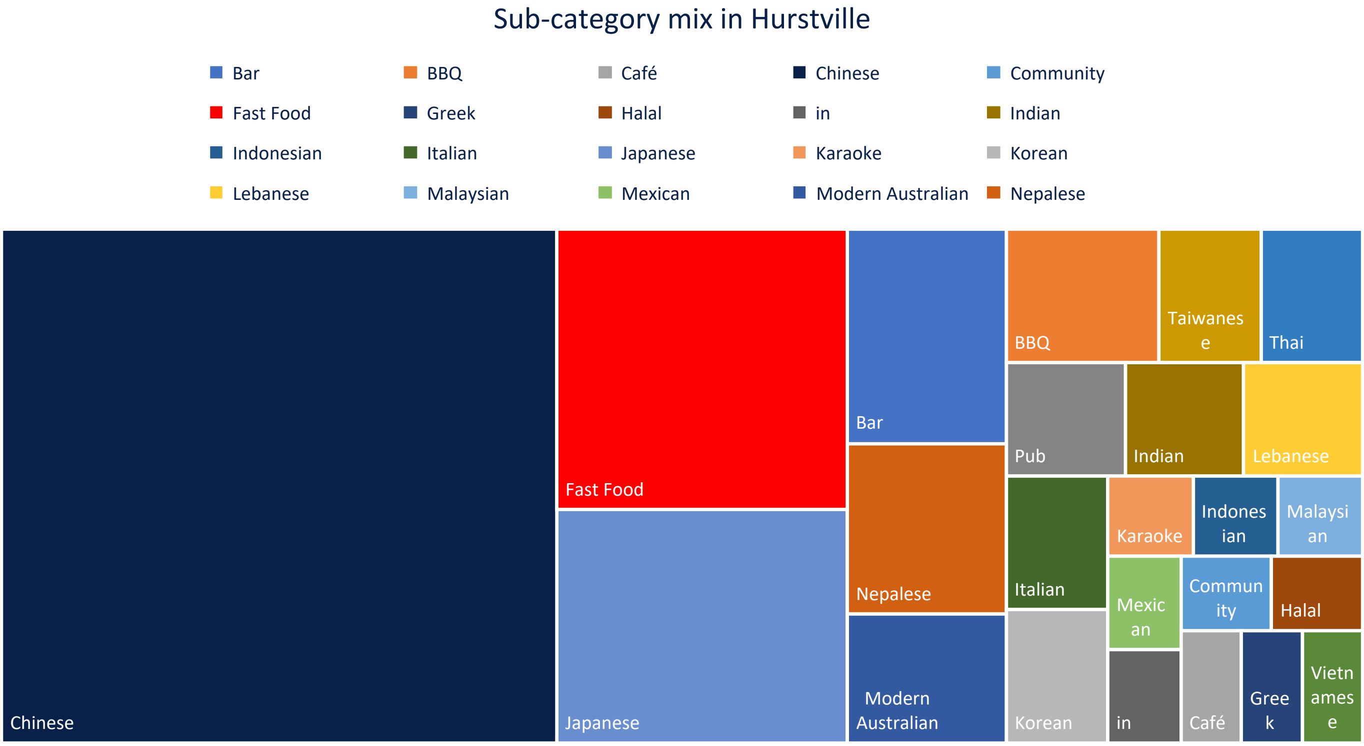
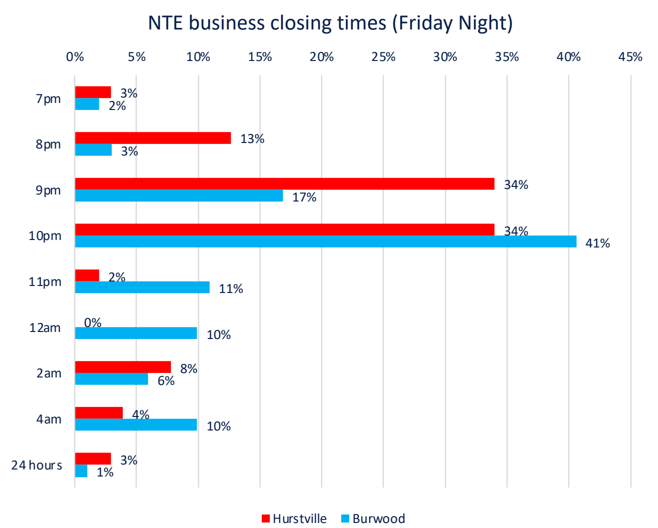
Business composition

The split in businesses in Hurstville is similar to Burwood in that Chinese restaurants comprise just over 40% of all NTE businesses.



Night time spread

The spread of night time activity in Hurstville, shows that it has an overall earlier profile than Burwood. In Hurstville only 17% of activities are open past 10pm, while the comparable figure is 38% in Burwood. This provides a noticeable point of difference for Burwood which has a much larger quantum of later night businesses, relative to Hurstville for a suburban centre. This is a point of difference to Burwood as 85% of Hurstville businesses close by 10pm on Friday nights.



Lessons learned for Burwood

- Hurstville is a very similar profile in many ways to Burwood. It's later night offer after 10pm however is very limited and this likely means that vibrancy after 9pm in the last hour of trading would be significantly reduced.
- Burwood should look to continue to foster a diverse range of later night options to ensure vibrancy continues later into the evening and economic opportunities that can support later night trading.
- Burwood has higher average capital price values for retail and NTE spaces than Hurstville, however concurrently has a lower vacancy rate and comparable net face rents. This leans towards Burwood being a better investment for long term capital and safer investment market. While yields are lower it should encourage Council to consider ways to emphasise the investment attraction of Burwood's capital assets.

Degraves Street & Flinders Lane, Melbourne

Why Degraves Street & Flinders Lane, Melbourne?

Degraves Street, near its intersection with Flinders Lane is a pedestrianised dining and night time precinct in Melbourne's CBD within the Hoddle Grid. It has a high density of night time activity and is a useful comparison as an aspirational target for a further matured night time centre.

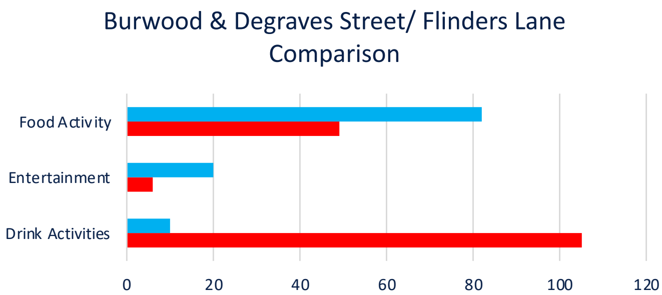
Summary

There were 160 core NTE Venues recorded in Degraves Street and Flinders Lane. The split of uses is shown below. Only 31% of night time activities were recorded as a 'food activity' and 4% as Entertainment. However, there is likely significant crossover with 'drink activities' and the other two categories. Nevertheless, the profile is very different to Burwood and Hurstville and is a much more alcohol-centric offering.

160 core NTE venues

	6	105	49
	4%	**66%**	**31%**
Burwood	18%	9%	73%
Australia	30%	7%	63%

A comparison between Burwood and Degraves Street highlights a vast difference between Burwood. With 82 food activities, Burwood actually has a much higher total offer of 'Food activities' than 49 found in the Degraves Street Precinct. Degraves street however has a very high volume of 'drink activities' many of which cross over with food and entertainment.



	Drink Activities	Entertainment	Food Activity
Burwood	10	20	82
Flinders Lane	105	6	49

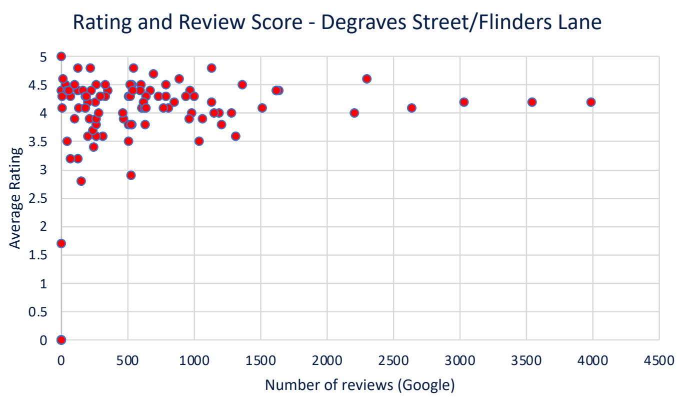
Economic and market characteristics

The market characteristics in Degraves Street show that the rental and capital values are far higher than Burwood. This is to be expected in a high exposure CBD location, however Burwood has a very strong night time quantum and diversity, which suggests it could be attractive when considering its comparative affordability as a precinct.

	Net Face Rents ($/sqm)	Sale Price ($/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~$1,500	~$28,000	9.2%	5.2%
Burwood	$684	$14,100	29	4.8%

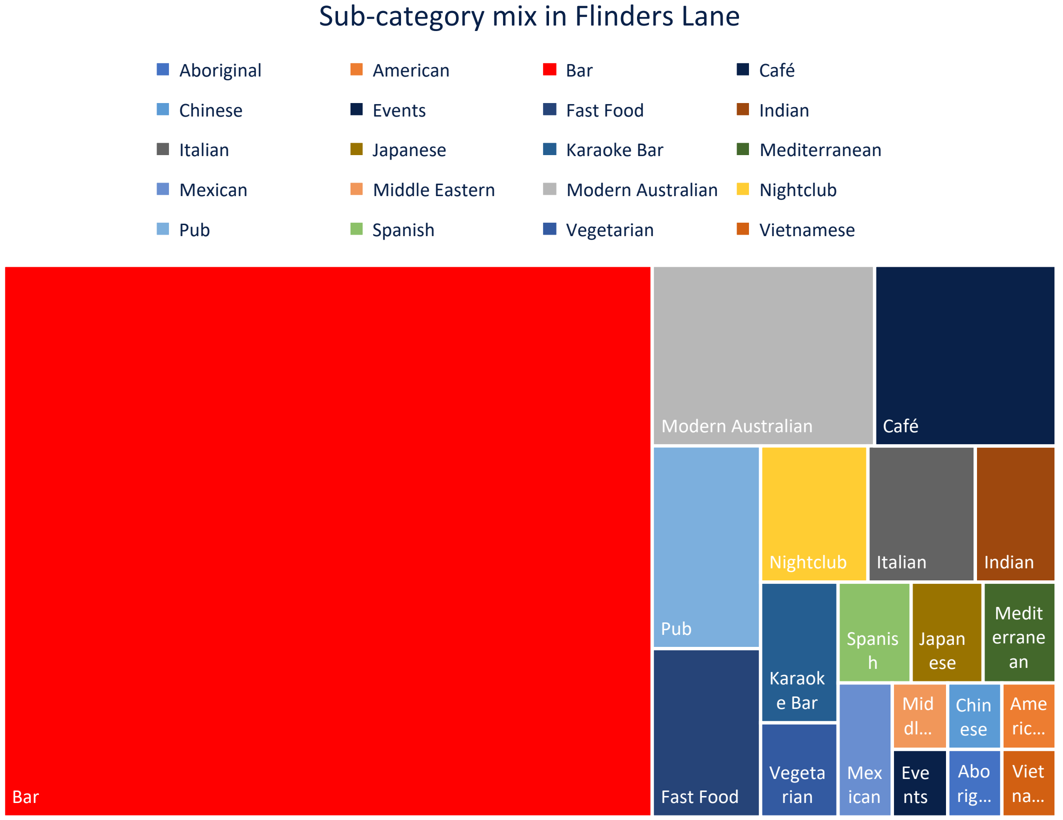
Business longevity and review

The average restaurant score for Degraves Street is 4.12, based on google reviews with an average review number of 609. As the chart below shows the average number of reviews is very high with 20 venues having over 1,000 reviews and 50 venues, over 500 reviews. These review quantum's and average scores are quite high in comparison to Burwood. Interestingly, almost all the NTE venues with over 1,500 reviews have an average score above 4. This emphasises the criticality of anchor institutions to support a cycle of new and 'in' venues. The average rating of 4.12 is an aspirational target for Burwood.



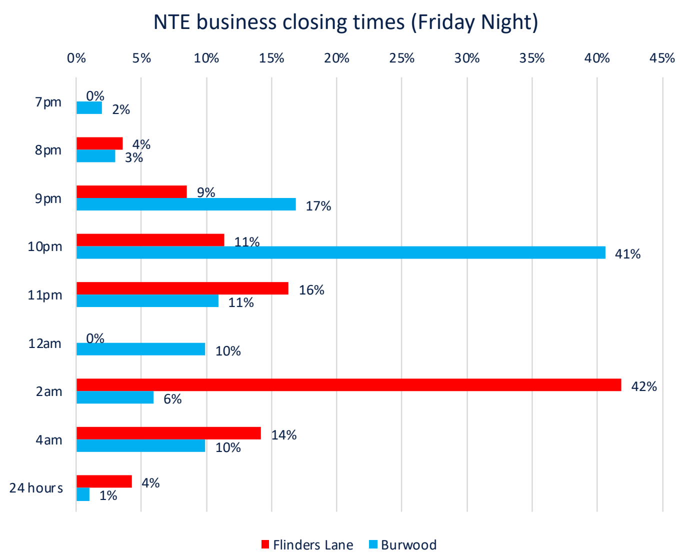
Business composition

The split in businesses in Degraves Street is markedly different from Burwood. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants.



Night time spread

The spread of night time activity in Degraves Street shows that it has an overall later night profile than Burwood. The latest time period for closure is 2am with over 40% of venues listing this as their closing time. While Burwood is unlikely to fit into this category, it could be a benchmark to aim for a more evened out closing profile.



Lessons learned for Burwood

- Degraves Street/ Flinders Lane has a high average rating of 4.12. This could be an aspirational target for Burwood institutions to aim for, noting however that it is not a reflection of the offer. An average of 4 may be a useful marketing and economic development tool.
- The very high capital prices and net face rents in comparison to Burwood highlight how affordable suburban NTE is against city centres and building on this attractive incentive to continually grow the NTE economy.
- Growing the late night NTE options further could be an aspirational target for Burwood.

Camden Town, London

Why Camden Town?

Camden Town is a major centre in North London, located 4-5km from Central London. Similar to Burwood it is a linear centre, focussed on Camden High Road and locally is the administrative centre for the Borough of Camden. It is a busy, vibrant night time economy and could be an aspirational vibrancy target for Burwood. Camden is well known in London. It is not usually considered a globally recognised London night time centre such as the West End, Shoreditch or Chelsea, but is a regional night time economy centre of significance.

Summary

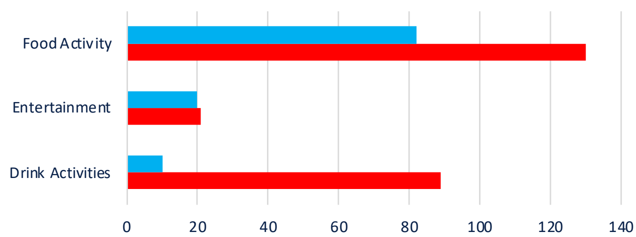
There were 240 core NTE Venues recorded in Camden compared to 112 in Burwood. The split of uses shown below depicts a strong representation across uses. It should also be acknowledged that there is considerable crossover, especially between 'Drink Activities' and 'Entertainment', with multiple drinking venues also accommodating live music.

240 core NTE venues

	21	89	130
	9%	**37%**	**54%**
Burwood	18%	9%	73%
Australia	30%	7%	63%

Camden has a very different night time profile to Burwood. This can be accounted for as a result of very different geographies however, interestingly it does have a more even spread across uses than many other comparison centres.

Burwood & Camden Town Comparison



	Drink Activities	Entertainment	Food Activity
Burwood	10	20	82
Camden Town	89	21	130

Economic and market characteristics

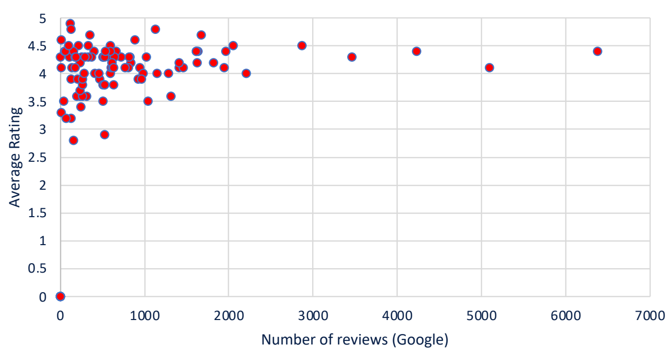
The market characteristics in Camden vary significantly from Burwood. The rental and capital costs reflect the high profile nature of the area, however the revenue ability may not actually be significantly greater on a sqm basis. The area has a very high capital transaction values which partly explains why yields are so low at ~2.5%, far lower than the average of 5-6% in most Australian centres. It also however means net face rents are high which does somewhat limit the ability of lower price options, in a market where there is not significantly more disposable income than Burwood.

	Net Face Rents ($/sqm)	Sale Price ($/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~$1,535	~$50-60,000	9.2%	2.5%
Burwood	$684	$14,100	29	4.8%

Business longevity and review

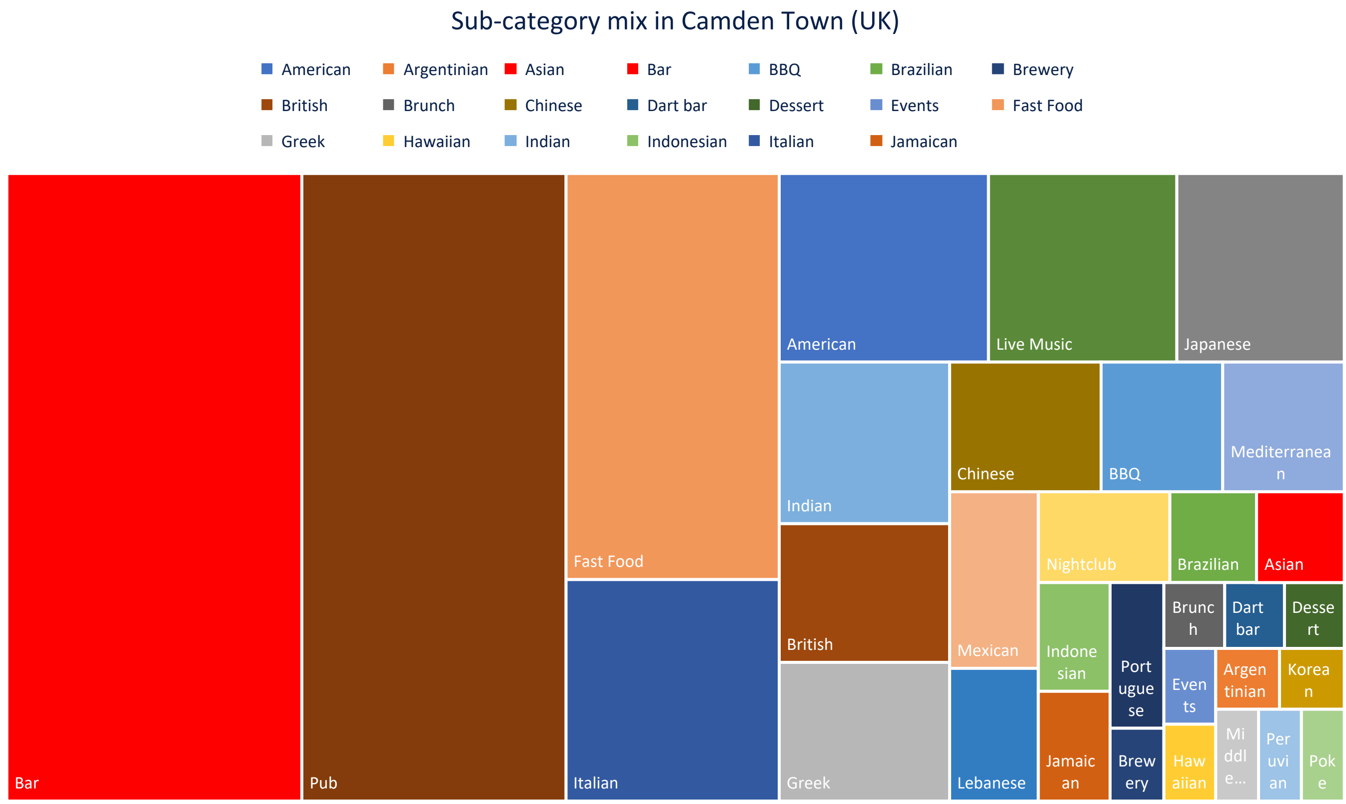
The average restaurant score for Camden is 4.11, based on google reviews with an average review number of 741. Similar to Degraves Street/Flinders Lane, the chart below shows the average number of reviews is very high with 23 venues having over 1,000 reviews and 7 venues, over 2,000 views. The chart also shows that many of the higher reviewed anchor establishments, have reviews over 4 stars. Again, for Burwood it is an aspirational target to have an average rating over 4.

Rating and Review Score - Camden Town



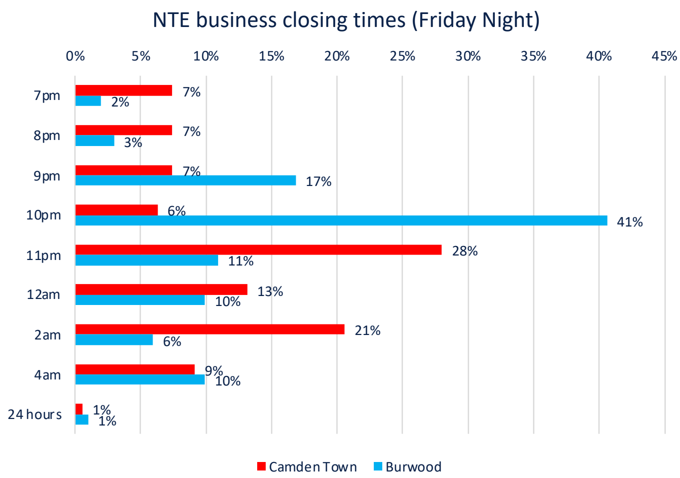
Business composition

The split in businesses in Camden is markedly different from Burwood and reflects the bar, pub and alcohol-related night time environment. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants. For a Borough which is ethnically diverse (35.4% white British in the 2020 Census), the night time offer is not especially diverse. This may be able to be explained by the fact it is a large regional NTE hub for patrons from a much wider area. This is also part of Burwood's appeal however in that it reflects its diverse demography in NTE business composition.



Night time spread

The spread of night time activity in Camden shows that it has an overall later night profile than Burwood. Over 30% of businesses in Camden shut at 2am or later.



Lessons learned for Burwood

- An aspirational target of 4 for average ratings should be able to be achieved.
- The long term market pressures show high capital value and low yield suggesting the value of night time suitable assets is likely to move slowly. Burwood in comparison remains an attractive capital investment, while also benefitting from much lower net face rents, while concurrently having a comparable market in terms of disposable income.
- Vacancy is almost at 10% in Camden. Burwood needs to carefully manage how adding new floorspace to the centre can impact absorption times and stress test the elasticity of current net face rent and changes to that from new development.

Melrose & Fairfax Avenues, Los Angeles

Why Melrose & Fairfax Avenues?

The intersection of Melrose and Fairfax avenues is a large commercial strip with a significant night time economy. Located in west Los Angeles, it is locally part of the Fairfax area, around 1-2km south of the much more famous Sunset Strip and east of West Hollywood and Beverley Hills. Like Camden, it is regionally well known, without being a global NTE centre like the aforementioned centres or other Los Angeles centres such as Hollywood or Santa Monica. Burwood is in the aspirational phase of reaching for regional status so from an aspirational perspective it is a useful benchmark.

Summary

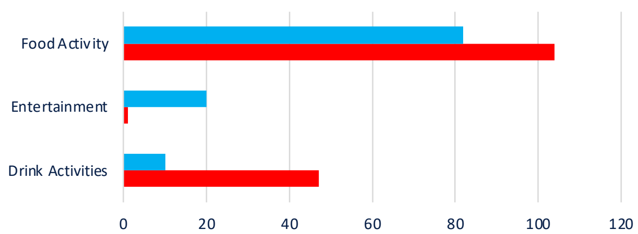
There were 152 core NTE Venues recorded in Melrose. The split of uses is shown below. It shows a strong representation across different activities. It should also be acknowledged that there is considerable crossover, especially between 'Drink Activities' and 'Entertainment', with multiple drinking venues also accommodating live music.

152 core NTE venues

	1	47	104
	1%	**31%**	**68%**
Burwood	18%	9%	73%
Australia	30%	7%	63%

Melrose has a profile, that like Burwood is focussed on 'food activities' however has a limited entertainment offer and a larger drinks offer. It is noticeable that its entertainment offer is small, yet as mentioned, likely crosses over with some of the 'Drink Activities'.

Burwood & Melrose Comparison



	Drink Activities	Entertainment	Food Activity
Burwood	10	20	82
Melrose	47	1	104

Economic and market characteristics

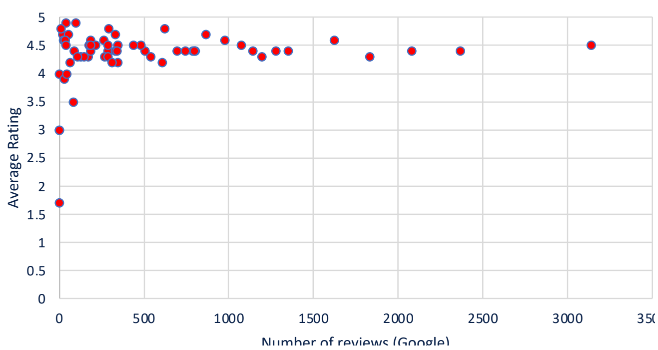
The market characteristics in Melrose vary significantly from Burwood and are more comparable to the higher capital transaction and rental values found in Camden. The rental and capital costs reflect the high profile nature of the area, however the revenue ability may not actually be significantly greater than Burwood on a sqm basis. The area has very high underlying capital values, however also has somewhat commensurate net face rents with yields around 4%. As a significant but secondary (not global) retail centre, it shows firstly the market considerations in comparable centres, but also the opportunity Burwood has to leverage off globally competitive rates in a very high income country.

	Net Face Rents ($/sqm)	Sale Price ($/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~$1,750	~$45,000	5.2%	3.95%
Burwood	$684	$14,100	29	4.8%

Business longevity and review

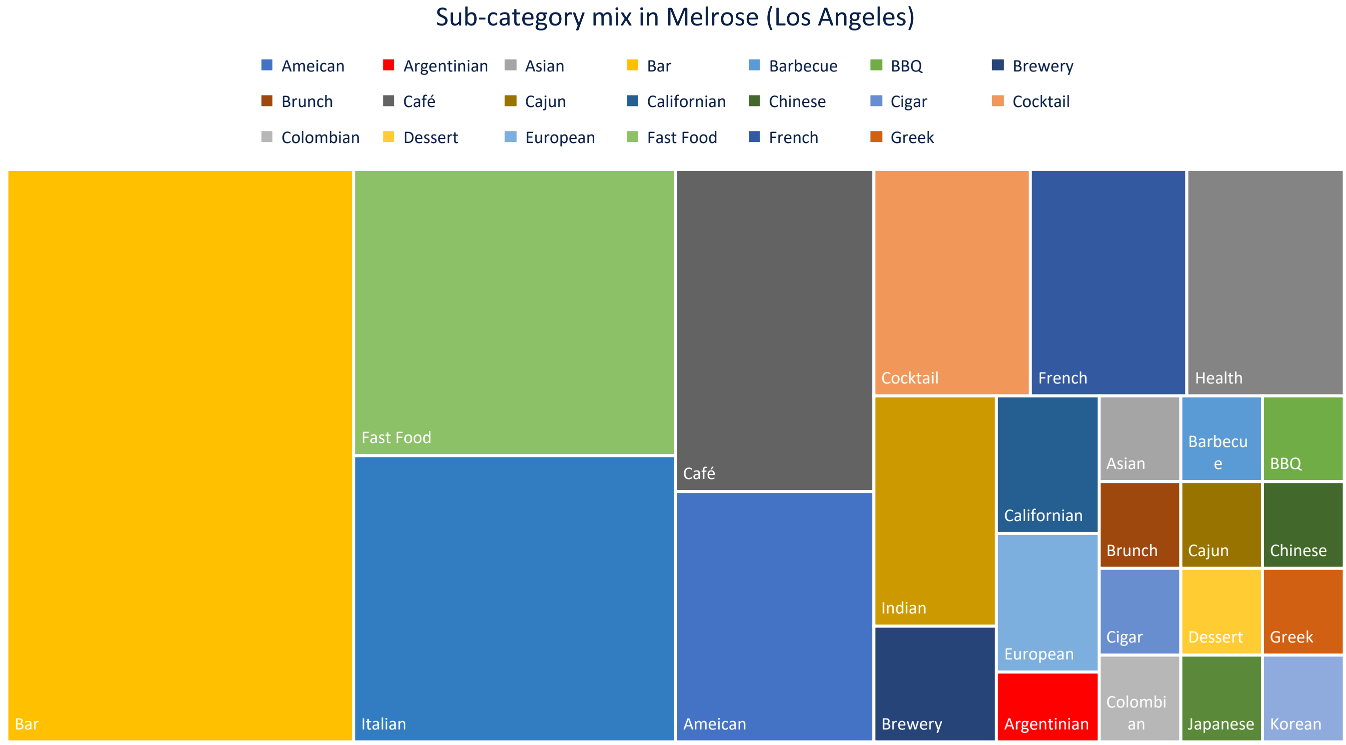
The average restaurant score for Melrose is 4.29, based on google reviews with the average review number of 507. The chart also shows a very high rating with almost all venues with over 250 ratings having an average review of 4 stars or greater. There are only 10 venues with over 1,000 reviews. The high ratings are consistent across venues with >500 reviews.

Rating and Review Score - Melrose/Fairfax



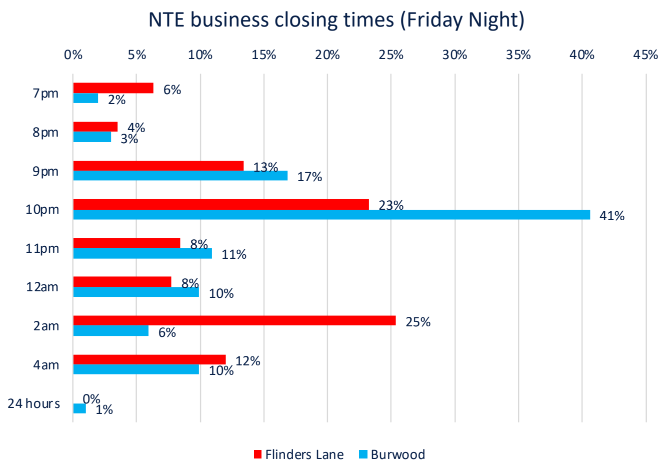
Business composition

The split in businesses in Melrose is markedly different from Burwood. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants.



Night time spread

The spread of night time activity in Melrose shows that it has an overall later night profile than Burwood. Melrose has a very consistent night time close profile with no dominant closing slot.



Lessons learned for Burwood

- Melrose and Camden present an aspirational target for Burwood to become an established regional NTE destination.
- While Burwood in the short to medium term is unlikely to compete directly with centres in Sydney with global prominence such as Bondi Beach or Barangaroo, there exists a major opportunity to be a regional NTE destination. Centres such as Camden and Melrose exist in this space in that they do not necessarily have global prominence but are substantially higher profile and more diverse in offer than simply a busy suburban centre.

Jalan Petaling, Kuala Lumpur

Why Jalan Petaling?

A concise case study of Jalan Petaling (Petaling Street) in Kuala Lumpur has been undertaken. This does not consider property differences as the data comparison is not accurate but does consider mix of venues, closing times and categorisation of NTE activities.

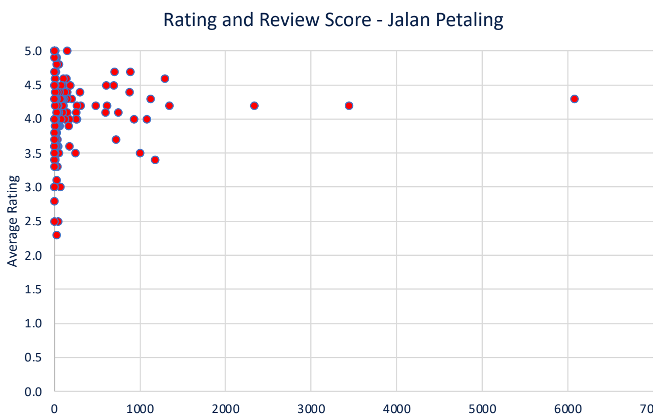
Summary

There were 187 core NTE Venues recorded in Jalan Petaling compared to 112 in Burwood. The split of uses shown below depicts a strong representation across uses. There was a significant proportion of entertainment venues that specialised in entertainment such as Karaoke Bars and Dance Clubs, whilst these venues would also overlap with 'drink activities' somewhat. In the sense of a high proportion of entertainment venues, it most closely resembled Burwood.

187 core NTE venues

	56	43	88
	30%	**23%**	**47%**
Burwood	18%	9%	73%
Australia	30%	7%	63%

Jalan Petaling has a different night time profile to Burwood, however noticeably, the number of food venues is very close in absolute number in Burwood, despite it having 66% more venues.



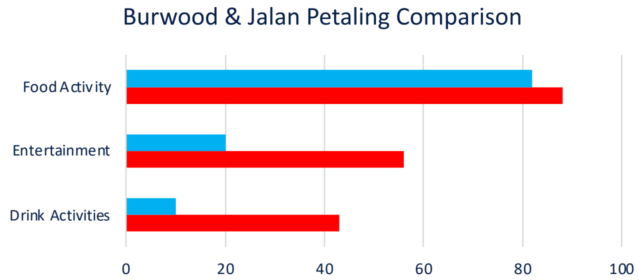
Economic and market characteristics

The market characteristics in Melrose vary significantly from Burwood and are more comparable to the higher capital transaction and rental values found in Camden. The rental and capital costs reflect the high profile nature of the area, however the revenue ability may not actually be significantly greater than Burwood on a sqm basis. The area has very high underlying capital values, however also has somewhat commensurate net face rents with yields around 4%. As a significant but secondary (not global) retail centre, it shows firstly the market considerations in comparable centres, but also the opportunity Burwood has to leverage off globally competitive rates in a very high income country.

	Net Face Rents ($/sqm)	Sale Price ($/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~$1,750	~$45,000	5.2%	3.95%
Burwood	$684	$14,100	29	4.8%

Business longevity and review

The average restaurant score for Camden is 4.14, based on google reviews with an average review number of 206. The average score and median score (4.20) are very high, though it should be noted the median count of reviews per venue is only 26, much lower than the average and other centres. There are 54 venues with less than 10 reviews also 53 venues with no review. This can be partly explained that a significant number of venues are hawker Stalls and very discreet restaurants with limited internet profile. Conversely, there are nine venues with over 1,000 reviews, which are a diverse mix of night clubs (3) Chinese restaurants (3) and Indian restaurant (1), a Karaoke bar (1) and a bar/restaurant (1).

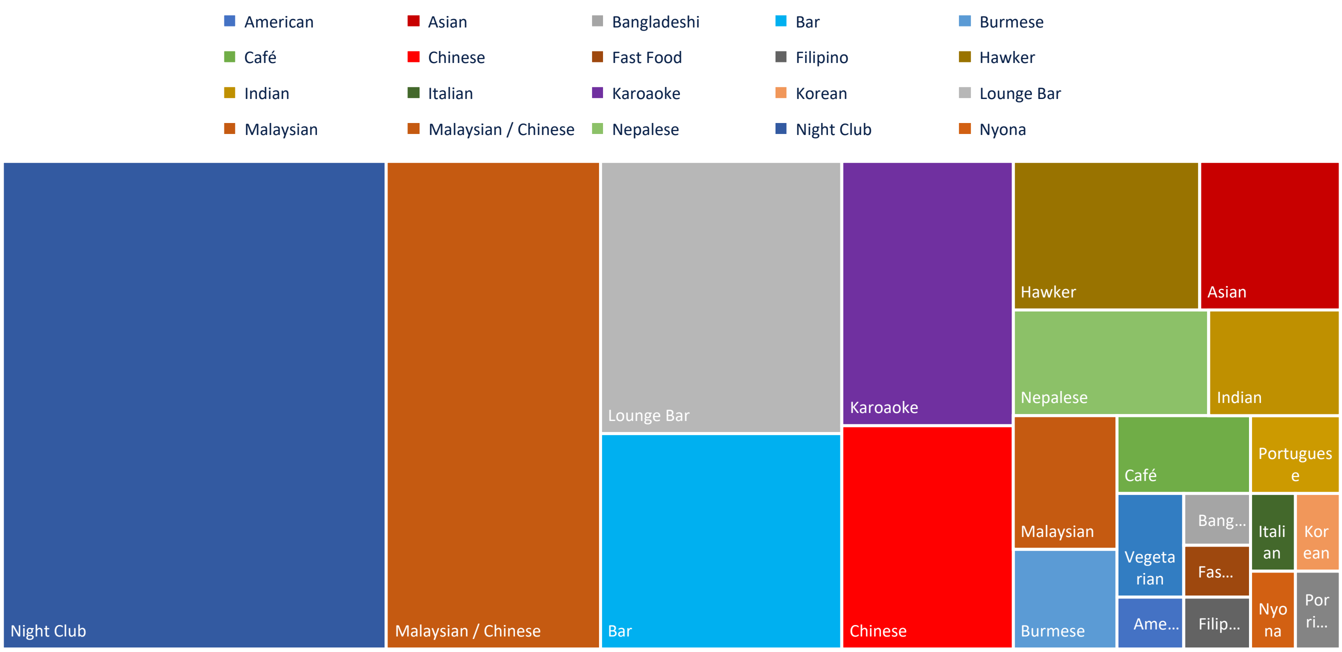


	Drink Activities	Entertainment	Food Activity
Burwood	10	20	82
Jalan Petaling	43	56	88

Business composition

The split in businesses in Jalan Pataling reflects it's central dining and entertainment district status. Interestingly it is night clubs which are the single largest individual category. Overall the mix of Malay Chinese, Malaysian, Chinese, Indian, South East Asian and Karaoke closely reflect Burwood.

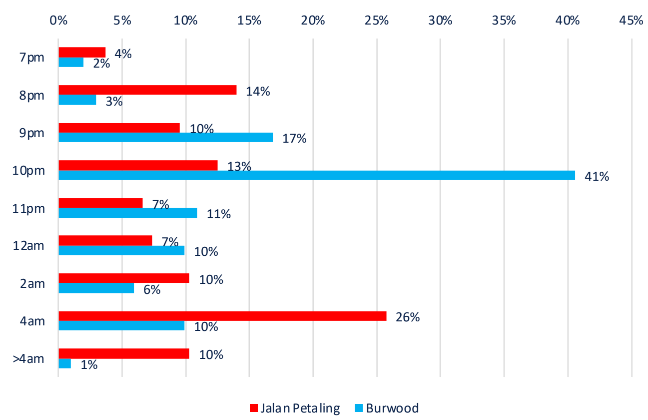
Sub-category mix in Jaya Petaling (Kuala Lumpur)



Night time spread

The spread of night time activity in Jalan Petaling shows that it has a mixed spread of closing times, however a lean to very late closing times reflecting the high number of night clubs and bars. Almost half the venues (46%) in Jalan Petaling close at 2am or later with over a third (36%) at 4am or later. This reflects both the mix of night time activities as well as the general nature of late night trading in Kuala Lumper, where many shopping centres are open till at least 10pm and often till midnight. For comparison to Burwood, there are many venues including non-alcohol focussed venues open to 2am or later.

NTE business closing times (Friday Night)



Lessons learned for Burwood

- The importance of anchor institutions is highlighted with a diverse mix of new venues with a small number of reviews and some restaurants and entertainment venues with over 1,000 reviews, almost all above 4 stars. These institutions serve as the focal points of the night time economy.
- Much of the category and sub-category mix reflects Burwood. It shows however that there may be further demographic demand and opportunity for even more entertainment venues to support the very high number of restaurants in Burwood,.
- There are a number of late night venues including café's and karaoke bars and others which are not alcohol-focussed open as late as past 4am. It provides a good comparative benchmark for Burwood in that there are successful examples of very late night entertainment options.

Appendix B – Definitions

CSP	Burwood Community Strategic Plan
DCP	Burwood Development Control Plan 2014
DPE	NSW Department of Planning and Environment
EP&A Act	Environmental Planning and Assessment Act 1979
FSR	Floor Space Ratio
LEP	Burwood Local Environmental Plan 2010
LGA	Local Government Area
LSPS	Burwood Local Strategic Planning Statement
NTE	Night Time Economy
SEPP	State Environmental Planning Policy

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