

ST MARYS

Night Time Economy Audit and Study



Prepared by HillPDA for Penrith City Council

Contents

1.0	Introduction	7
1.1	The night time economy	7
1.2	Study methodology	7
1.3	St Marys NTE audit study area	8
2.0	Socio-economic review	9
2.1	Employment by industry	9
2.2	Number of businesses	11
2.3	Employment containment rates	12
2.4	Tourism and visitor statistics	12
2.5	Anti-social behaviour	13
2.6	Key findings	15
3.0	Night time economy audit	16
3.1	St Marys NTE business activity	17
3.2	Patron activity	18
3.3	Observed anti-social behaviour	21
3.4	Visible security systems	22
4.0	SWOT analysis	24
5.0	Night time economy opportunities	25
5.1	Key findings from case studies	35
	Appendix A : Consultation summary	38
A.1	SWOT analysis activity	38
A.2	Mapping exercise	39
A.3	St Mary's now and in the future	42
A.4	General discussion items	42
	Appendix B : Online business survey	43
	Appendix C : Land use audit maps	47

Tables

Table 1: Employment by industry.....	10
Table 2: Employment by NTE linked industry (ABS 2016)	10
Table 3: Number of businesses by industry 2016.....	11
Table 4: Employment containment rates – Penrith LGA	12
Table 5: Tourism and visitor nights	12
Table 6: NTE audit by business category	17
Table 7: Patron activity by business category and audit evening.....	18
Table 8: Patron activity by time period, business category and audit evening	19
Table 9: SWOT analysis	24

Figures

Figure 1: St Marys NTE audit study area	8
Figure 2: Economic analysis and audit boundary	9
Figure 3: Incidents of Assault (Non-domestic assault) - 2018	13
Figure 4: Reported incidents of malicious damage to property - 2018	14
Figure 5: Reported incidents of robbery - 2018	14
Figure 6: St Marys NTE audit route	16
Figure 7: Proportion of businesses open versus closed during audit period (4pm to 10pm).....	17
Figure 8: Proportion of businesses open versus closed during audit by period	18
Figure 9: Patron activity by business category and audit evening	19
Figure 10: Combined evening patron activity (4pm-10pm) – red circle, areas of high concentration	20
Figure 11: Anti-social behaviour audit	21
Figure 12: Visible security systems during audit	22
Figure 13: Observed security shutter and roller doors.....	23
Figure 14: Night time activity cluster	26
Figure 15: Reservoir Major Activity Area Framework Plan.....	28
Figure 16: Atlantic Avenue, Delray Beach, Florida	30
Figure 17: Fremantle High Street	34
Figure 18: Where does night time activity currently occur?	39
Figure 19: What are the barriers to night time activity?	40
Figure 20: What initiatives could be done to improve night time activity/patronage?	41
Figure 21: Location and business type of online respondents	43
Figure 22: St Marys business audit by category	47
Figure 23: Thursday evening patron activity (4pm-10pm)	48
Figure 24: Friday evening patron activity (4pm-10pm)	49
Figure 25: Saturday evening patron activity (4pm-10pm).....	50
Figure 26: Thursday observed anti-social incidents	51
Figure 27: Thursday observed anti-social incidents	52

Quality Assurance

Report Contacts

Nicholas Hill

Senior Consultant

B. Science, M Human Geography,
Macquarie University (2012) M.A
Property Development, University of
Technology Sydney (2015)

Nick.Hill@hillpda.com

Supervisor

Adrian Hack

Principal, Urban and Retail Economics


M. Land Econ. B.Town Planning (Hons). MPIA

Adrian.Hack@hillpda.com

Quality Control

This document is for discussion purposes only unless signed and dated by a Principal of HillPDA.

Reviewer

Signature		Dated	10/10/19
-----------	---	-------	----------

Report Details

Job Number	C19030
Version	FINAL
File Name	St Marys night time economy audit and study
Date Printed	10/10/2019

EXECUTIVE SUMMARY

St Marys is a key regional centre offering a strategic role and community focus to a significant catchment of residents, businesses and workers. St Marys Town Centre is poised for growth, with the North South Rail Link heralding the town centre as a place for significant residential development over the coming decade.

With residential growth comes a demand for a more diverse economy with a spread of activities that extends into the evening so that residents can confidently walk around the town centre on their way to meet friends, grab a meal or go to an entertainment venue.

HillPDA was contracted by Penrith City Council (Council) to describe and analyse the current night time economy in the St Marys Town Centre and identify opportunities and strategies to enhance activity over time.

HillPDA worked with Council and key stakeholders to assess the current situation of the night time economy with the compilation of key demographic and economic data, together with “on the ground” audits of what activities and destinations are already active along Queen Street in the evening. The study has identified insights into how the town centre functions ‘after sunset’ and providing a base for us to explore further collaboration with our partners such as the St Marys Town Centre Corporation.

The St Mary Night Time Economy Audit and Study describes the existing evening economy and recommends four key actions as part of an overall strategy which builds on the existing strengths of the night time economy and grows other supporting complementary elements.

The Study encompasses five main components:

1. Description of the social and economic characteristics of the place
2. Night time audits
3. SWOT Analysis
4. Community consultation
5. Night Time Economy Opportunities.

In general, the study found that the St Marys Town Centre has a range of strengths, including a dynamic takeaway food and beverage industry. The diverse economic base included businesses that currently brought people into the centre in the evening such as gyms, chemists and doctor’s surgeries that could be retained for longer by activations and the local food and beverage outlets.

Four key opportunities in the night time economy for intervention by Council and partners to work towards in the short to medium term were identified and include:

1. Defining a night time activity cluster
2. Implementing night time place making interventions
3. Creating a destination within a walkable catchment
4. Activate street frontages.

The St Marys Night Time Economy Audit and Strategy has been the first investigation into the structure and function of this emerging component of the town centre’s economy and social life. The recommended strategies to support the growth and diversification in the town centre is a significant first step in a balanced approach, identifying a range of multi-faceted interventions designed to improve people and business activity in the town centre at night.

INTRODUCTION

1.0 INTRODUCTION

St Marys has been identified as a strategic centre in the Western City District Plan (District Plan). This status increases its role in providing for the retail, employment, recreational, cultural and educational needs of its surrounding resident, business, worker and visitor communities.

The North South Rail Link, connecting St Marys to Badgerys Creek Aerotropolis, via Western Sydney Airport, has the capacity to further enhance the centre's strategic role. The proposed rail link will increase the centre's profile for higher density housing options and associated supportive commercial, retail and social services.

Council recognised the potential of St Marys and commissioned HillPDA to undertake an audit to understand the current night time economy (NTE). The data collected from the audit is intended to inform the development of a strategy to explore what could be improved and the types of intervention possible to enhance the NTE.

The audit would also contribute to Council addressing actions identified in the District Plan for St Marys, these being:

- Support the role of St Marys as a centre, by enabling a mix of land uses, to encourage a diverse and active NTE
- Facilitate the attraction of a range of uses that contribute to an active and vibrant place.

1.1 The night time economy

The NTE generally involves social, cultural and business activities that take place from 6pm-6am. It has been estimated that the NTE in Australia accounts for around 17% of all establishments. Collectively, these establishments employ more than 3.1 million people and generate sales turnover of around \$661 billion, making up 26% of total employment and contributing 19% of total turnover¹.

As well as the economic contribution, a successful and vibrant NTE can improve social cohesion, raise a centre's profile for increased investment and reduce anti-social behaviour through increased passive surveillance.

The NTE is driven by three key areas of business activity, these being:

5. Food (e.g. cafes and restaurants)
6. Entertainment (e.g. clubs, sports and performing arts)
7. Drink (e.g. pubs and bars).

1.2 Study methodology

To meet the requirements of the project brief this study undertook the following methodology:

1. A high-level review of socio-economic characteristics pertaining to the NTE in St Marys
2. Consultation with local businesses, including a focus group session, phone interview and online survey
3. An audit of businesses open on Thursday, Friday and Saturday night between 4pm to 9pm – including which businesses were open, numbers of people within, any anti-social behaviour or people congregating.

¹ The Australian Night Time Economy 2015, Prepared for the National Local Government Drug and Alcohol Committee 2017

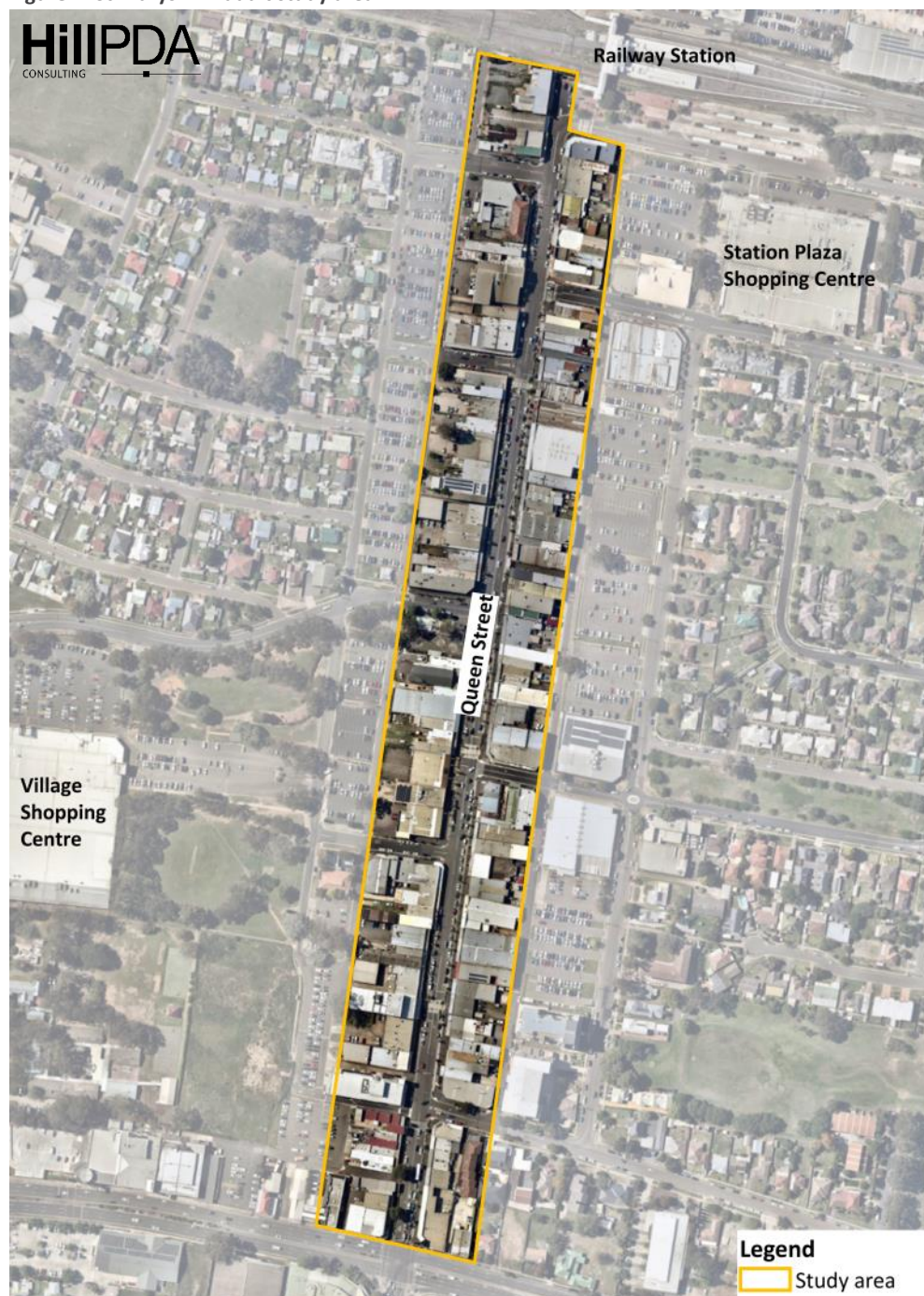
1.3 St Marys NTE audit study area

The study area for the audit primary relates to businesses fronting Queen Street. Queen Street is comprised of strip retailing consisting of mainly one to two story buildings.

St Marys has traditionally served as a local retail centre for the nearby residential areas of St Marys, Colyton, Oxley Park, Claremont Meadows, Erskine Park and St Clair.

A survey undertaken by HillPDA in 2011 found that Queen Street provided around 22,000sqm of strip retailing. Of this around 25% was attributed to professional service providers such as banks, real estate agents, accountants, lawyers and health care professionals.

Figure 1: St Marys NTE audit study area



Source: HillPDA

2.0 SOCIO-ECONOMIC REVIEW

The following Chapter undertakes a review of the existing socio-economic environment of St Marys centre with a particular focus on indicators pertaining to the NTE. The information in this Chapter has been sourced from the Australian Bureau of Statistics (ABS), Community/Economy ID and the Transport Performance Analytics (TPA).

The smallest geographical boundary that the ABS and TPA provide place of work employment data at is known as a Destination Zone (DZ) or Travel Zone (TZ). As such, analysis of employment data for St Marys has been undertaken at the DZ referred to as 115810007 (refer to Figure 2).

The DZ used for the employment analysis is referred to as the study area.

Figure 2: Economic analysis and audit boundary



Source: HillPDA 2018

2.1 Employment by industry

As of 2016, St Marys generated around 2,360 jobs, which was around 3% of all employment generated in Penrith LGA.

Employment by industries, which are closely linked to the NTE (accommodation and food services), are represented at a significantly greater proportion in St Marys, when compared to the wider LGA (12% and 7% respectively).

This high proportion of employment within these NTE linked industries, implies that there may be a number of existing businesses in St Marys that are either contributing to, or have the potential to contribute to, the NTE through such initiatives as extended trading hours.

Table 1: Employment by industry

Industry	Study area		Penrith	
	#	%	#	%
Agriculture, Forestry and Fishing	0	0%	718	1%
Mining	0	0%	164	0%
Manufacturing	36	2%	5,616	8%
Electricity, Gas, Water and Waste Services	0	0%	942	1%
Construction	41	2%	6,426	9%
Wholesale Trade	4	0%	1,894	3%
Retail Trade	471	20%	8,034	12%
Accommodation and Food Services	273	12%	5,000	7%
Transport, Postal and Warehousing	24	1%	4,294	6%
Information Media and Telecommunications	11	0%	465	1%
Financial and Insurance Services	86	4%	955	1%
Rental, Hiring and Real Estate Services	129	5%	1,153	2%
Professional, Scientific and Technical Services	120	5%	2,315	3%
Administrative and Support Services	91	4%	1,748	3%
Public Administration and Safety	273	12%	4,873	7%
Education and Training	174	7%	6,943	10%
Health Care and Social Assistance	340	14%	9,767	14%
Arts and Recreation Services	71	3%	956	1%
Other Services	99	4%	2,624	4%
Inadequately/not stated	113	5%	1,016	1%
Total	2,359	100%	68,597	100%

Source: ABS 2016

A closer look at employment generated at the ANZIC 4 – Digit level, highlights that cafes and restaurants and takeaway food services comprise the majority of potential NTE related employment in St Marys (62%).

Compared to the wider LGA, St Marys contained a higher proportion of employment in the industries of cafes and restaurants; health and fitness centres and gymnasias operations; and clubs. Business operators in these sub-industries could form the basis for strengthening the centres NTE.

Please note, even though no employment was recorded in brothel keeping and prostitution services – there are a number of establishments present in the centre, as such employment in the NTE industries is likely higher.

Table 2: Employment by NTE linked industry (ABS 2016)

Industry	Study area		Penrith	
	#	%	#	%
Accommodation	3	1%	160	3%
Food and Beverage Services, nfd	4	1%	84	2%
Cafes, Restaurants and Takeaway Food Services, nfd	0	0%	33	1%
Cafes and Restaurants	110	37%	1,442	28%
Takeaway Food Services	73	25%	2,047	40%
Pubs, Taverns and Bars	20	7%	363	7%
Clubs (Hospitality)	60	20%	771	15%
Health and Fitness Centres and Gymnasias Operation	20	7%	174	3%
Other Gambling Activities	4	1%	39	1%
Brothel Keeping and Prostitution Services	0	0%	5	0%
Total NTE linked industries	294	100%	5,118	100%

2.2 Number of businesses

There were around 178 businesses located in the St Marys study area, which was around 1.4% of all business located in Penrith LGA (over 13,030 businesses).

Although the industry of accommodation and food services was the fourth largest employment generator in the study area, by total number of businesses it ranked seventh.

This implies that business in this category had higher employment densities, that is, had a higher employment ratio per businesses when compared to other industries. An increase in the number of businesses within this industry would likely increase the total amount of people employed in St Marys, when compared to a similar increase in other industries.

The accommodation and food services industry was also more proportionally concentrated in the study area when compared to the LGA (7% compared to 3%) implying that a number of potential NTE businesses are currently present in the centre.

Table 3: Number of businesses by industry 2016

Industry	Study area		Penrith LGA	
	Number	%	Number	%
Agriculture, Forestry and Fishing	0	0%	237	2%
Mining	0	0%	12	0%
Manufacturing	3	2%	691	5%
Electricity, Gas, Water and Waste Services	0	0%	51	0%
Construction	13	7%	3,583	27%
Wholesale Trade	3	2%	443	3%
Retail Trade	33	19%	675	5%
Accommodation and Food Services	13	7%	317	2%
Transport, Postal and Warehousing	9	5%	1,836	14%
Information Media and Telecommunications	0	0%	65	0%
Financial and Insurance Services	4	2%	376	3%
Rental, Hiring and Real Estate Services	17	10%	955	7%
Professional, Scientific and Technical Services	16	9%	1,170	9%
Administrative and Support Services	12	7%	640	5%
Public Administration and Safety	3	2%	73	1%
Education and Training	3	2%	189	1%
Health Care and Social Assistance	23	13%	621	5%
Arts and Recreation Services	3	2%	202	2%
Other Services	23	13%	896	7%
Total Industries	178	100%	13,032	100%

Source: Economy id

2.3 Employment containment rates

Workers employed within accommodation and food services had a greater propensity to also live in Penrith LGA (71%). This proportion was significantly higher than that recorded for all industries combined (53%).

The high containment rates in the accommodation and food service industry imply that increased provision of NTE businesses would contribute to Penrith LGA meeting its employment targets, increasing the city's overall employment containment rate and contribution to a 30-minute city.

Table 4: Employment containment rates – Penrith LGA

Category	Accommodation & food services		Total industries	
	Number	%	Number	%
Live and work in the area	3,524	71%	36,641	53%
Work in the area, but live outside	1,458	29%	31,884	47%
Total workers in the area	4,982	100%	68,525	100%

Source: Economy ID

2.4 Tourism and visitor statistics

Over the last eight years, the proportion of international and domestic visitor nights in Penrith LGA has significantly increased (236% and 120%, respectively) when compared to that recorded across NSW (52% and 24%, respectively).

Continued strong growth in the number of tourists and visitors to Penrith LGA creates an opportunity for accommodation businesses to benefit and expand in St Marys and Penrith. Increased visitors to St Marys can also have beneficial flow-on effects to other NTE businesses in the centre, including those in the industries of:

- Cafes and restaurants
- Pubs and cubs
- Other night time associated services.

Table 5: Tourism and visitor nights

Year	Penrith LGA		NSW	
	International Visitor Nights	Domestic Visitor Nights	International Visitor Nights	Domestic Visitor Nights
2009/10	188,777	435,947	60,866,348	77,083,497
2016/17	634,978	957,300	92,293,842	95,228,948
Change #	446,202	521,353	31,427,494	18,145,451
Change %	236%	120%	52%	24%

Source: Economy ID

2.5 Anti-social behaviour

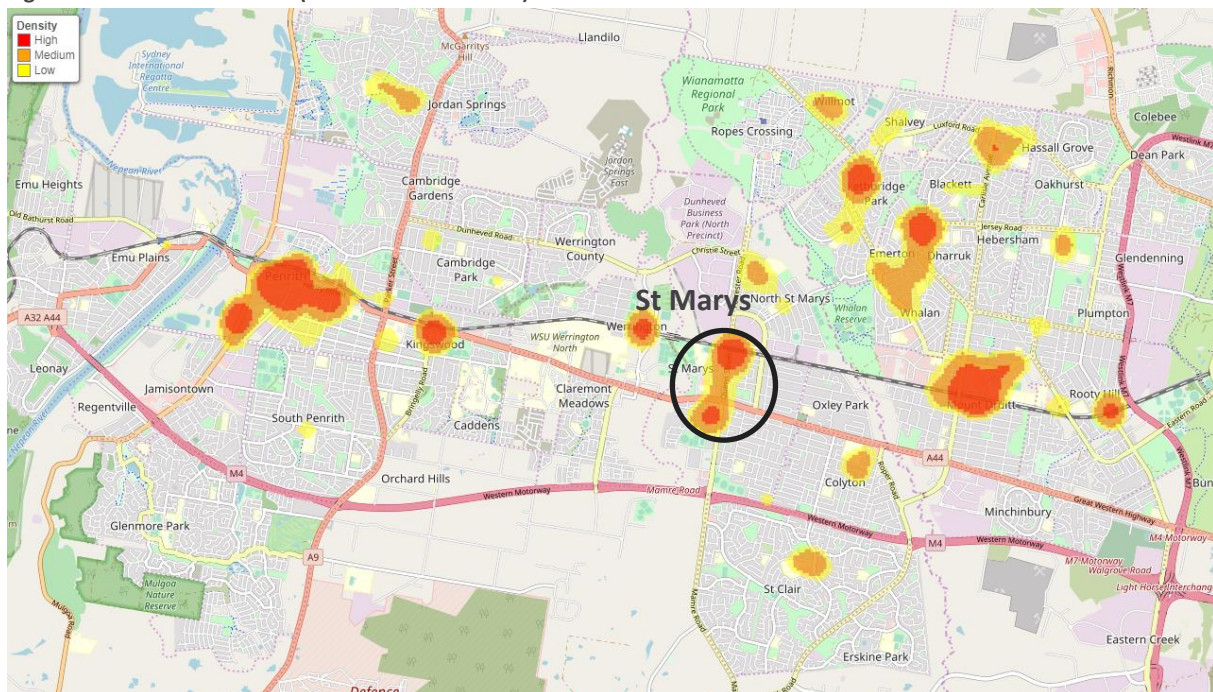
The NTE can experience issues associated with anti-social behaviour, therefore it is important to consider any existing anti-social issues in the St Marys location. The presence of anti-social behaviour, actual or perceived, can deter local residents, workers and visitors from participating in the NTE of an area.

As seen in the figure below, the NSW Bureau of Crime Statistics (BOCSAR) data indicates that St Marys has a high frequency of recorded non-domestic assault incidents.

These incidents of non-domestic assaults are predominately concentrated in and around the railway station and just to the south of the Great Western Highway. As seen in the following maps the centre is also a reported hotspot for incidents related to malicious damage to property and robbery.

Increased active and passive surveillance would be required in and around St Marys to encourage positive community perception of the centre in the late hours and therefore increased night time activity and visitation.

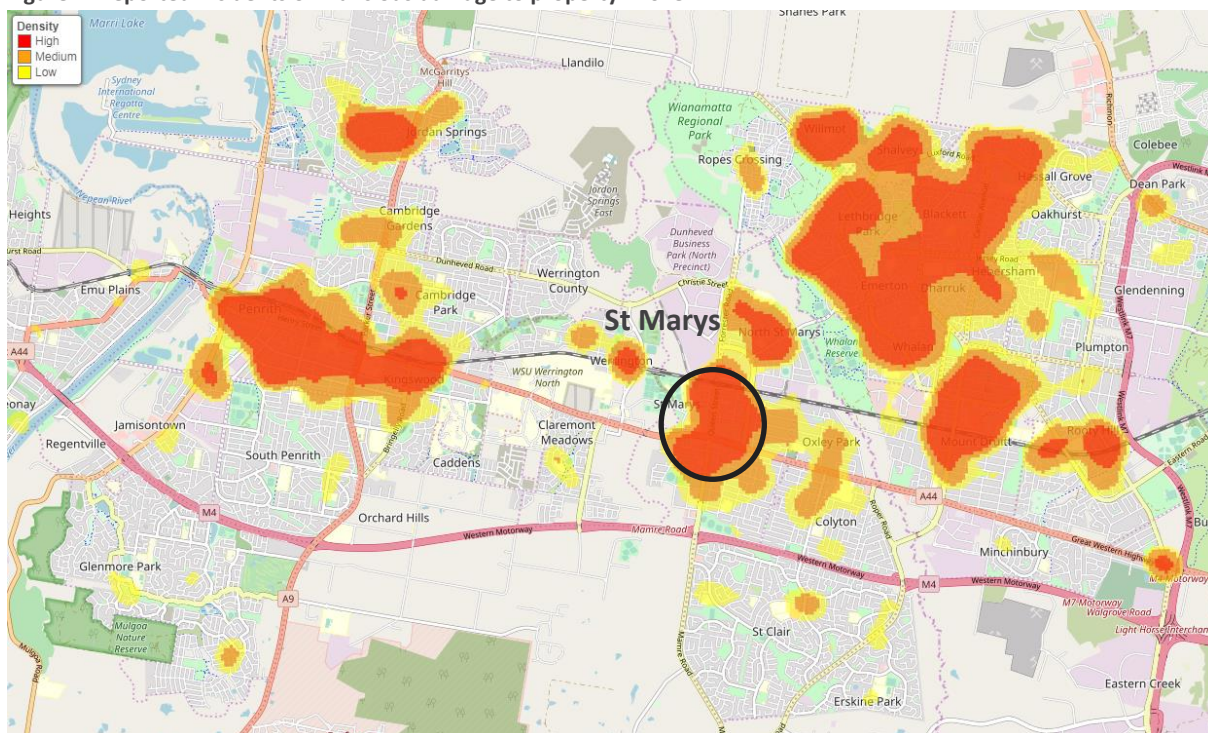
Figure 3: Incidents of Assault (Non-domestic assault) - 2018



Source: BOCSAR incidents recorded between October 2017 and September 2018

The below map shows that St Marys is also a hotspot area for reported incidents of malicious damage to property.

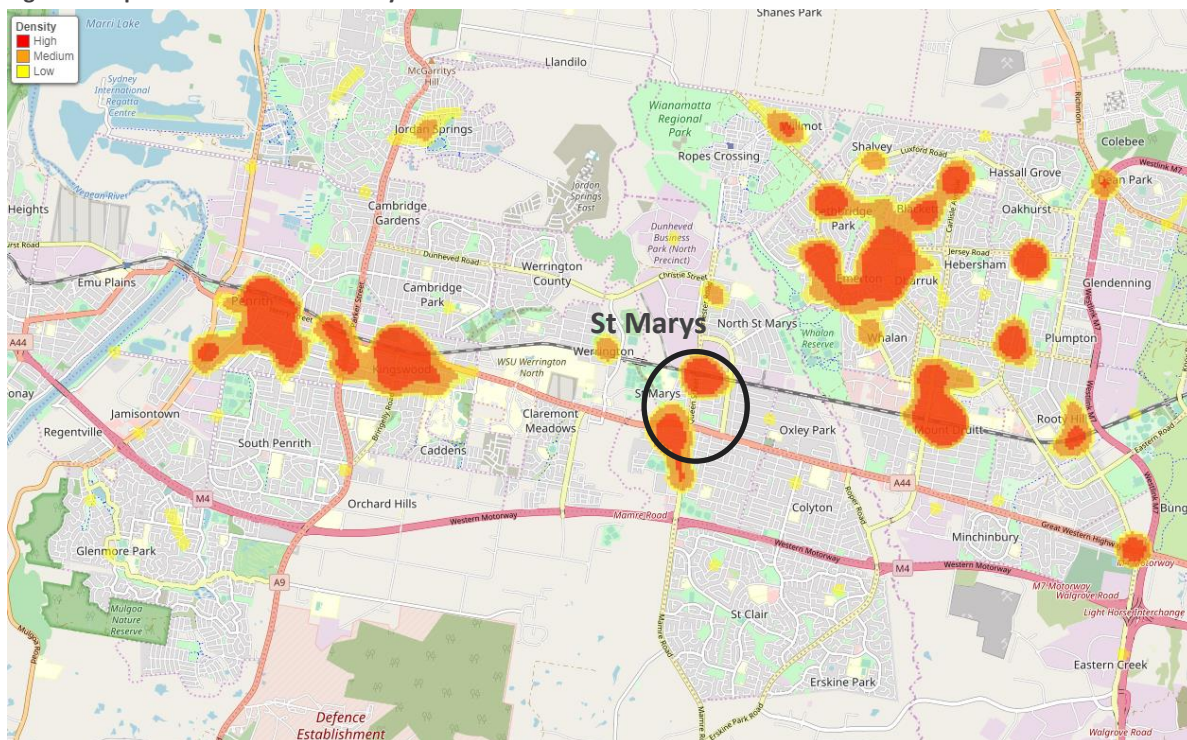
Figure 4: Reported incidents of malicious damage to property - 2018



Source: BOCSAR incidents recorded between October 2017 and September 2018

The below map shows that St Marys is also a hotspot area for reported incidents of robbery.

Figure 5: Reported incidents of robbery - 2018



Source: BOCSAR incidents recorded between October 2017 and September 2018

2.6 Key findings

- Proportionally, employment in NTE industries was more represented in St Marys when compared to the wider LGA. This implies that there may be a number of existing businesses in St Marys that either are contributing too or have the potential to enhance the NTE through such initiatives as extended trading hours
- Compared to the wider LGA, St Marys contained a higher proportion of employment in the industries of cafes and restaurants; health and fitness centres and gymnasias operations; and clubs. Business operators in these sub-industries could form the base for strengthening the centres NTE
- Although the industry of accommodation and food services was the fourth largest employment generator in the study area, by total number of businesses it ranked seventh. This implies that businesses in this category had higher employment densities when compared to other industries. An increase in the number of businesses within this industry would likely increase the total amount of people employed in St Marys when compared to a similar increase in other industries
- The high containment rates in the accommodation and food service industry imply that increased provision of NTE businesses would contribute to the Penrith LGA meeting its employment targets; increasing its overall employment containment rate; and contribution to a 30-minute city
- Continued strong growth in the number of tourists and visitors to Penrith LGA and St Marys would have beneficial flow-on effects to other NTE businesses in the centre
- St Marys has a high frequency of recorded non-domestic assault, malicious damage to property and robbery incidents. Increased active and passive surveillance would be required in and around St Marys to encourage positive community perception of the centre in the late hours and therefore increased night time activity and visitation.

3.0 NIGHT TIME ECONOMY AUDIT

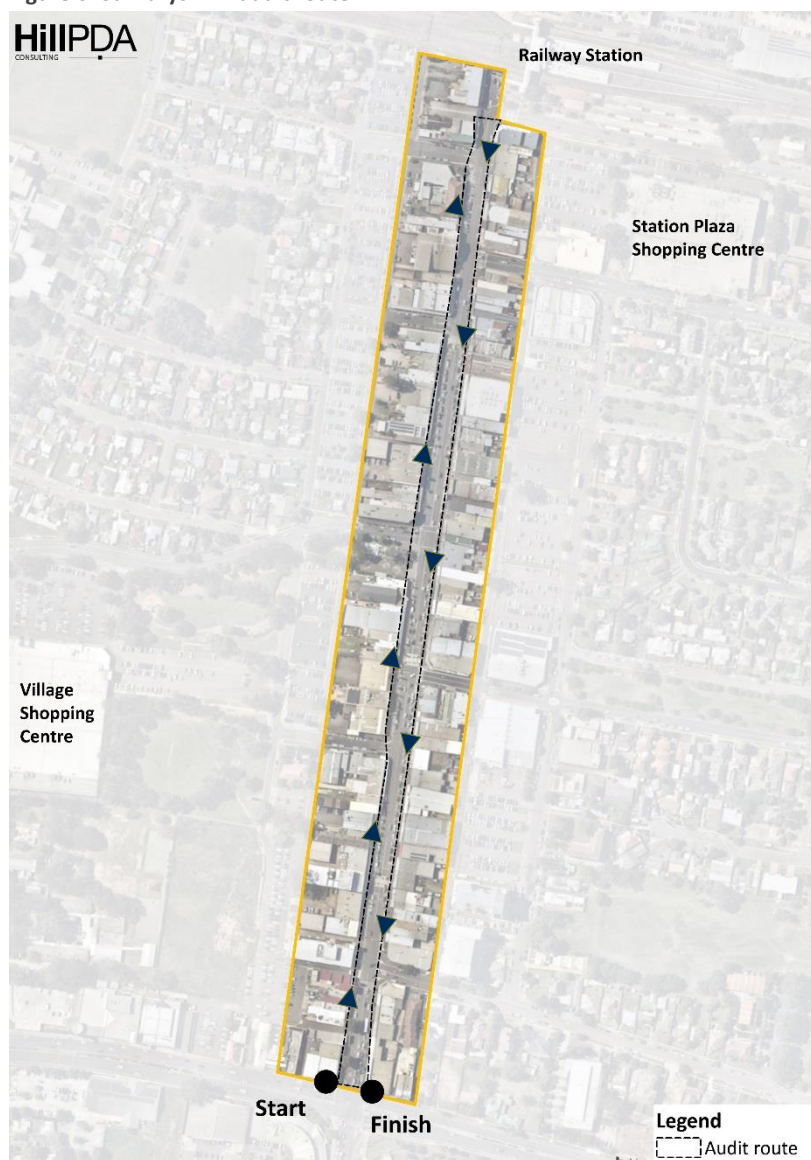
An audit of the NTE in St Marys was undertaken to assess the current level of activity, inform the SWOT analysis and provide baseline data for the development of a centre strategy for St Marys.

The survey recorded the type of business, the number of patrons within, if the premise was closed or open and anti-social behaviour. This audit did not include activity associated with internal businesses in the Station Street Plaza or Village shopping centres and was primarily focused on street activity along Queen Street.

The audit was undertaken on Thursday the 29th of November, Friday the 30th of November and Saturday the 1st of December between 4pm-10pm. A team of two HillPDA staff walked up and down Queen Street on the hour. During this time the number of patrons in each venue was counted and any anti-social behaviour was noted.

The figure below identifies the survey audit route.

Figure 6: St Marys NTE audit route



Source: HillPDA

3.1 St Marys NTE business activity

During our audit 53 businesses linked to the NTE were counted. Of these, almost a third (15 businesses) were categorised as a café/restaurant, one fifth (11 businesses) were speciality non-food and the third largest category were speciality food businesses with nine recorded.

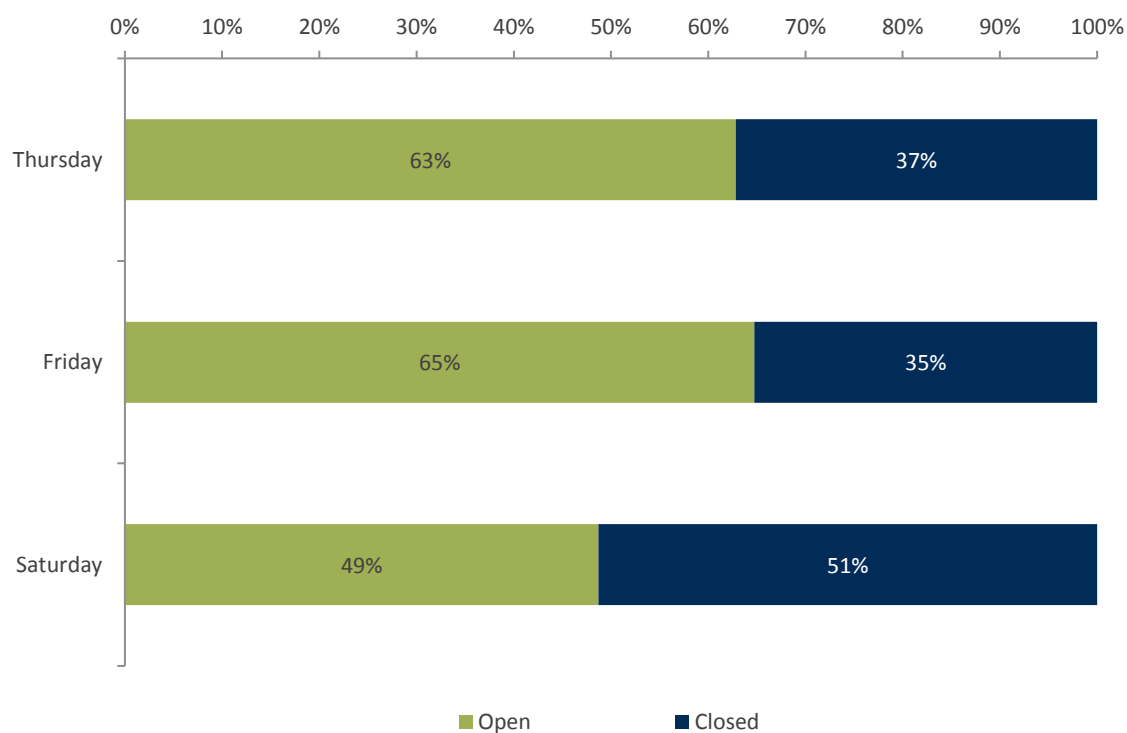
Table 6: NTE audit by business category

Business category	Count	%
Café/restaurant	15	28%
Specialty non food	11	21%
Specialty food	9	17%
Take away	7	13%
Fitness	2	4%
Supermarket/convenience	4	8%
Adult entertainment	2	4%
Community	1	2%
Commercial	1	2%
Hotel	1	2%
Total	53	100%

Source: HillPDA 2018 audit

Of these businesses, the highest proportion was open during Friday evenings audit followed by Thursday and lastly Saturday evening.

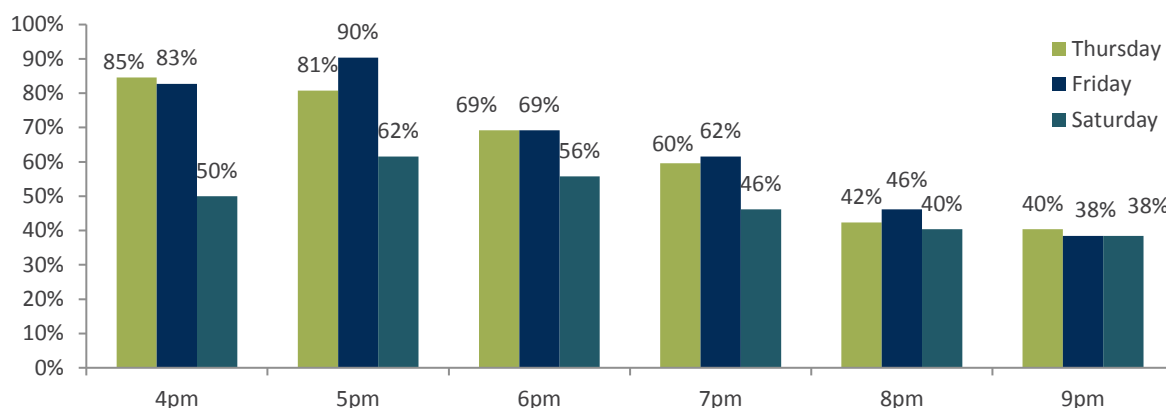
Figure 7: Proportion of businesses open versus closed during audit period (4pm to 10pm)



Source: HillPDA 2018 audit

A closer look reveals that over the three audit days the highest proportion of businesses were open around the 4pm to 6pm time period, with a steady decline in the proportion open post this period.

Figure 8: Proportion of businesses open versus closed during audit by period



Source: HillPDA 2018 audit

3.2 Patron activity

The table below presents the number of patrons recorded by business category type for each night of the audit.

From the audit we have observed:

- Over the three evenings around a total of 2,150 patrons were recorded inside the NTE business premises²,
- Friday was the busiest evening with a total of around 789 patrons recorded over the period, followed by Saturday (712 patrons)
- Thursday was the quietest evening with a total of 647 patrons recorded over the period
- Most patrons were visiting cafes and restaurants followed by the St Marys Hotel and fitness/gym premises (see Figure 9)
- Although Saturday recorded the lowest number/proportion of businesses open during the audit, it recorded the highest number of patrons dining out in cafes/restaurants.

Table 7: Patron activity by business category and audit evening

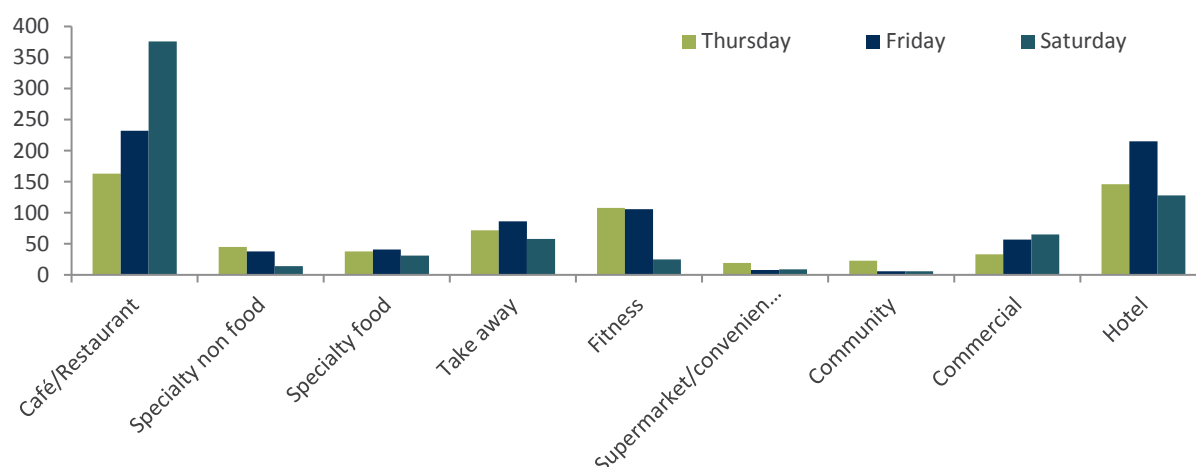
Category	Thursday	Friday	Saturday	Combined
afé/Restaurant	163	232	376	771
pecialty non food	45	38	14	97
pecialty food	38	41	31	110
ake away	72	86	58	216
itness	108	106	25	239
upermarket/convenience	19	8	9	36
ommunity	23	6	6	35
ommercial	33	57	65	155
otel	146	215	128	489
otal	647	789	712	2,148

Source: HillPDA 2018 audit

² Please note that given the difficulties recording patrons within adult entertainment premises, as discretion, security and privacy is highly valued/respected, patron numbers within these venues was difficult to recorded and as such excluded. We would recommend direct consultation with these businesses in the following St Marys strategy

The figure below shows total patron activity by business category and audit evening.

Figure 9: Patron activity by business category and audit evening



Source: HillPDA 2018 audit

The table below further breakdown total patron activity by business category and audit evening.

From the audit we have observed:

- Friday evenings audit, between 7-8pm, recorded the highest single patron level of the three evenings (176 patrons)
- Although the proportion of NTE businesses open past 7pm patronage steadily declines, during the Friday and Saturday audits the number of patrons remains relatively high
- During Saturday evening the number of patrons in café/restaurants post 7pm was highest over the three evenings, despite the evening having the lowest proportion of businesses open
- Café/restaurants significantly increase patron levels post 7pm and are the main NT activity in the centre
- Although the St Marys Hotel is a significant NTE activity, post 7pm the number of patrons decreases significantly.

Table 8: Parton activity by time period, business category and audit evening

Category	Thursday		Friday		Saturday	
	4pm-7pm	7pm-10pm	4pm-7pm	7pm-10pm	4pm-7pm	7pm-10pm
Café/Restaurant	42	121	27	205	137	239
Specialty non food	34	11	25	13	12	2
Specialty food	30	8	31	10	21	10
Take away	28	44	36	50	31	27
Fitness	57	51	43	63	13	12
Supermarket/convenience	19	0	5	3	7	2
Community	21	2	6	0	6	0
Commercial	25	8	42	15	45	20
Hotel	92	54	139	76	91	37
Total	348	299	354	435	363	349

Source: HillPDA 2018 audit

The figure below present a visual summary of patron activity recorded over the audit nights. The map shows that the key areas of activity were around St Marys Hotel, the area between Belar Street and Charles Hackett Drive and the western side of Queen Street - south of Crana Street.

Figure 10: Combined evening patron activity (4pm-10pm) – red circle, areas of high concentration



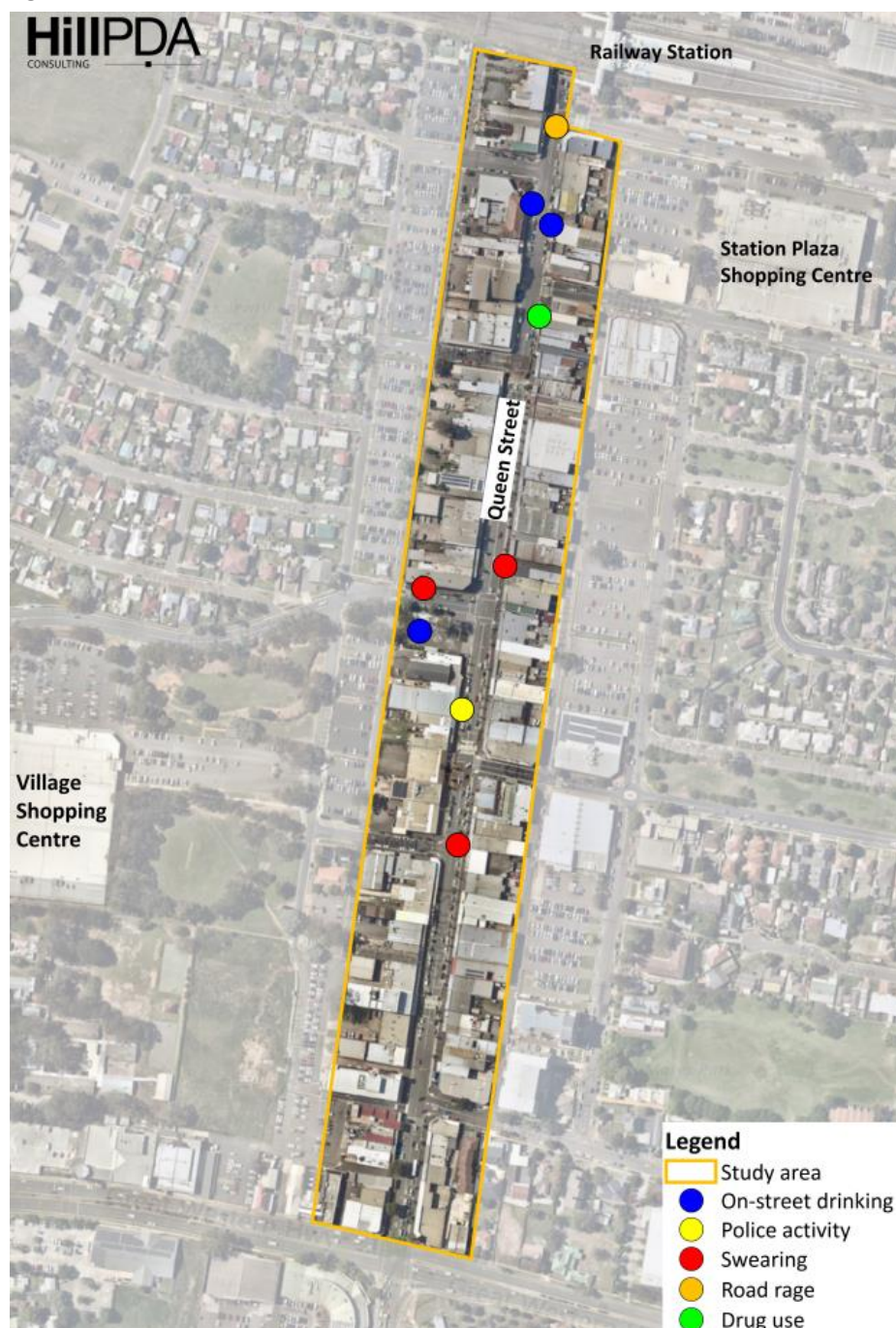
Source: HillPDA 2018 audit

3.3 Observed anti-social behaviour

During the audit there was a number of anti-social behaviour incidents observed, these were:

- Drinking on the street, predominantly around St Marys Hotel and Coachmans Park
- Swearing in public
- One account of recreational drug use
- One account of road rage, involving swearing
- One account of law enforcement involving the stopping and questioning of a driver
- It must be noted that no incidents of anti-social behaviour were observed on Saturday night.

Figure 11: Anti-social behaviour audit



Source: HillPDA 2018 audit

3.4 Visible security systems

During the audit observed visible security systems were noted. These systems included CCTV, visible alarms and two premises with security guards including the library. The approximate location of these security systems can be seen in the figure below.

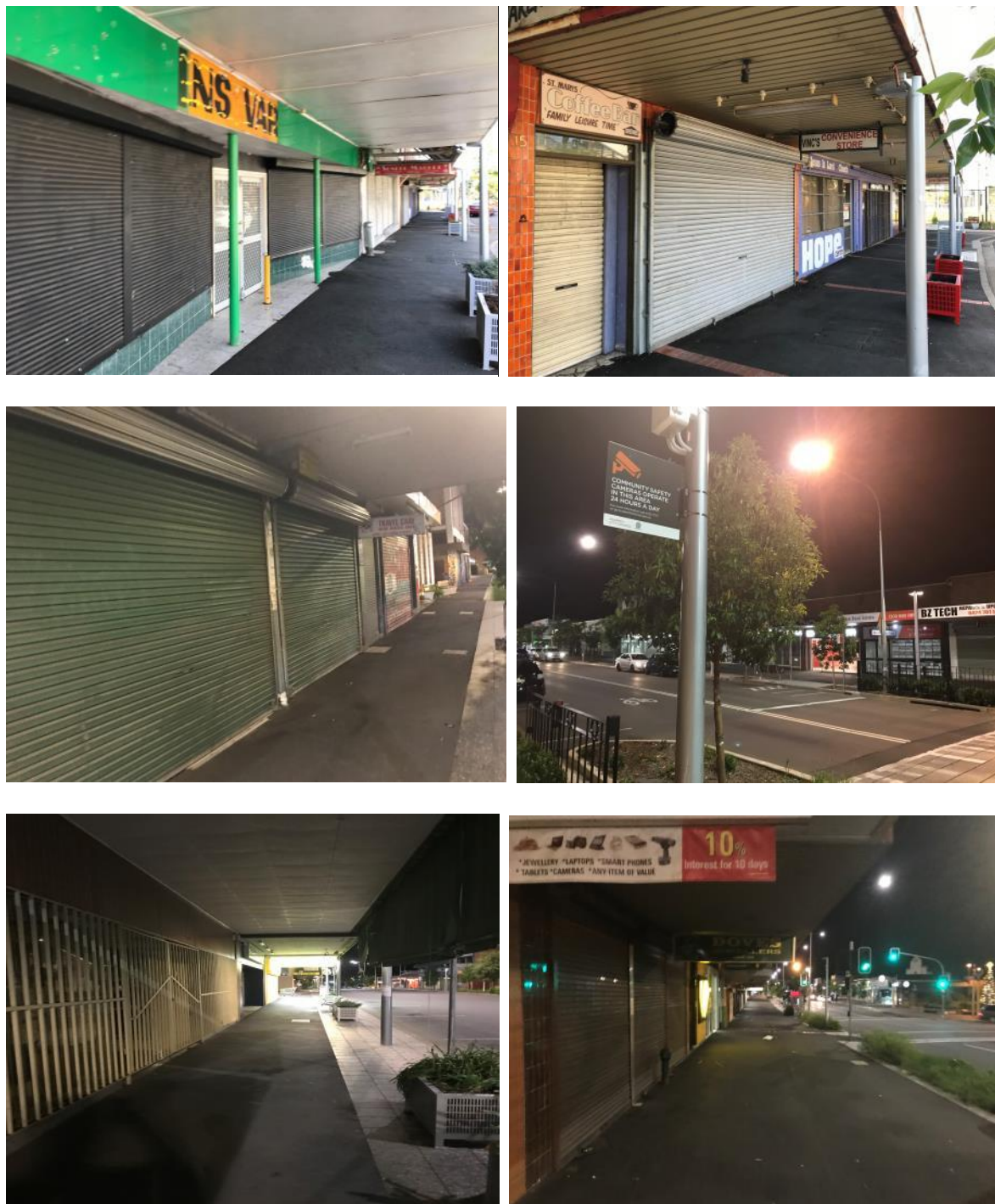
Figure 12: Visible security systems during audit



Source: HillPDA 2018 audit

A significant number of businesses also had gates and security shutter/roller doors during their closed period. Some of these can be seen in the photos below.

Figure 13: Observed security shutter and roller doors



Source: HillPDA 2018 audit

4.0 SWOT ANALYSIS

The SWOT analysis has been informed by the key findings in this report including, the on the ground observations of the NTE, the online business survey and consultation with businesses and key stakeholders associated with the St Mary's Town Centre. It is intended that the SWOT analysis can inform Council's future strategy development for St Mary's.

Table 9: SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> Large established centre Appealing public domain treatments Strong public transport connections Friendliness of business owners Established annual events calendar Culturally diverse centre Sufficient parking availability Established surrounding community. 	<ul style="list-style-type: none"> Lighting and safety issues in some areas (car parks) Poor building aesthetics High vacancy and turnover in some locations Limited NT retail offering Areas prone to antisocial behaviour Limited surrounding higher density residential Lack of integration across rail line Lacks a clear and appealing night time centre identity Limited family-friendly venues for night time activities Businesses indicated that the lack of night time events; safety in the centre and business mixture were barriers to night time activity Anecdotal lack of CCTV camera surveillance A businesses stated that <i>"theft, verbal abuse and drug use is common"</i> in the centre Supermarkets/enclosed retail centres disconnected from main street retailing. The roller doors, although there for security, detract from the appeal and attractiveness of the centre at night Lack of footpath activation and outdoor dining.
Opportunities	Threats
<ul style="list-style-type: none"> Strategic Centre status of St Marys Opportunity with the new rail link New development could improve the quality of built form and deliver public benefits Opportunity to encourage NTE business clusters Potential for strong population growth in surrounding low density areas Council owned assets in key locations could be leveraged to deliver improvements Council's commitment to public works improvements Strong café/restaurant activity on Saturday evenings Extend business operating hours and number of businesses in the NTE Consolidate NTE activity around station Creation of specific NTE precincts (food / entertainment) Improved connection between main street retailing and enclosed retail centres More outdoor dining and footpath activation would enhance vibrancy of centre. 	<ul style="list-style-type: none"> Further increases in vacancy rate detracting businesses Strengthening of competing centres Stigma for anti-social behaviour Possible larger retail centre in Werrington Campus Location and integration of new railway station Leakage of expenditure and demand to surrounding centres.

5.0 NIGHT TIME ECONOMY OPPORTUNITIES

Vibrant NTE's create new business opportunities and increase social cohesion. When vibrant streetscapes with imaginative lighting and events are created, cafes, restaurants and entertainment venues will be encouraged to extend their usual 9am to 5pm trading period into the late evening. This increased business growth, trading hours and pedestrian traffic will also result in a safer environment.

At the start of 2019, the NSW Government released a number of initiatives around the NTE in NSW including:

- Promoting the night-time economy
 - \$1.5 million to support the NTE through Create NSW and Office of Responsible Gambling – live music events
 - \$15,000 to support local initiatives that will bring positive improvements to public safety and amenity in and around licensed premises and in other public and private spaces
 - Supporting small bars to open and operate – including increasing capacity from 60 to 100 persons and relaxation on the type of drinks that small bars can serve after midnight.
- Making it easier to run a night-time business
 - Easier liquor licensing application process through two web-based tools
 - Implementing licensing improvements and red tape reductions to make it easier for restaurants and cafes to start-up and operate across NSW.

There may be opportunities for Penrith City Council to access funding to support some NTE initiatives.

Literature also establishes that a mix of uses provides the opportunity for retail markets to capitalise on pedestrian activity during the day and at night from residents, workers and visitors. Leveraging off existing events, creating street art and installing WiFi hot spots can support a distinctive identity and a sense of belonging that strengthens activity centres. A younger apartment-dwelling demographic with high annual retail expenditure is the ideal customer base for night-time businesses like bars and restaurants. A stronger night economy also supports local business services such as transport, cleaning and maintenance.

Below are some initiatives to support the delivering of a stronger NTE.

Initiative 1: Define a night time activity cluster

Supporting the growth of both day and night time activity level creates a more vibrant and safe environment. Extending trading hours past the standard '9-5' concept enhances consumer access to goods and services and the trading opportunity for businesses.

According to the business survey findings, hours of operation in St Mary's are relatively standard with a small number of businesses open for extended hours or during the evening. When businesses are open, they are generally distributed along the extent of the street, with no clear or defined area to encourage night time activities.

Defining a night time activity cluster can assist in enhancing activation, attracting particular businesses and managing community expectations. While it is important to maintain flexibility to accommodate the changing needs of businesses, establishing character statements can be helpful.

As identified in the workshop and through the business survey, the concept of a 'Twilight' economy was favourable, creating opportunities for small bars, restaurants, dessert bars and cultural venues at St Mary's. It was recognised that the most appropriate location for the night time activity cluster was towards the station, where there are some existing evening establishments and more accessible public transport linkages.

Strengthening the streetscape appeal and integration of the space around the station would encourage activation with a pleasant street environment and improved amenity, generally more conducive to outdoor dining or events. Incorporating night time events in public spaces, community facilities and a broader mix of uses may also encourage families and customers that would otherwise not visit the centre. Hosting markets or other free events in the centre after hours can also be conducive to enhancing activity. At present, there are limited spaces available in the centre that could support community events and they are not effectively linked with the existing retailers or transport links. Defining a clear night time activation space that is well lit, has the infrastructure to support outdoor entertainment and has passive surveillance, will be important.

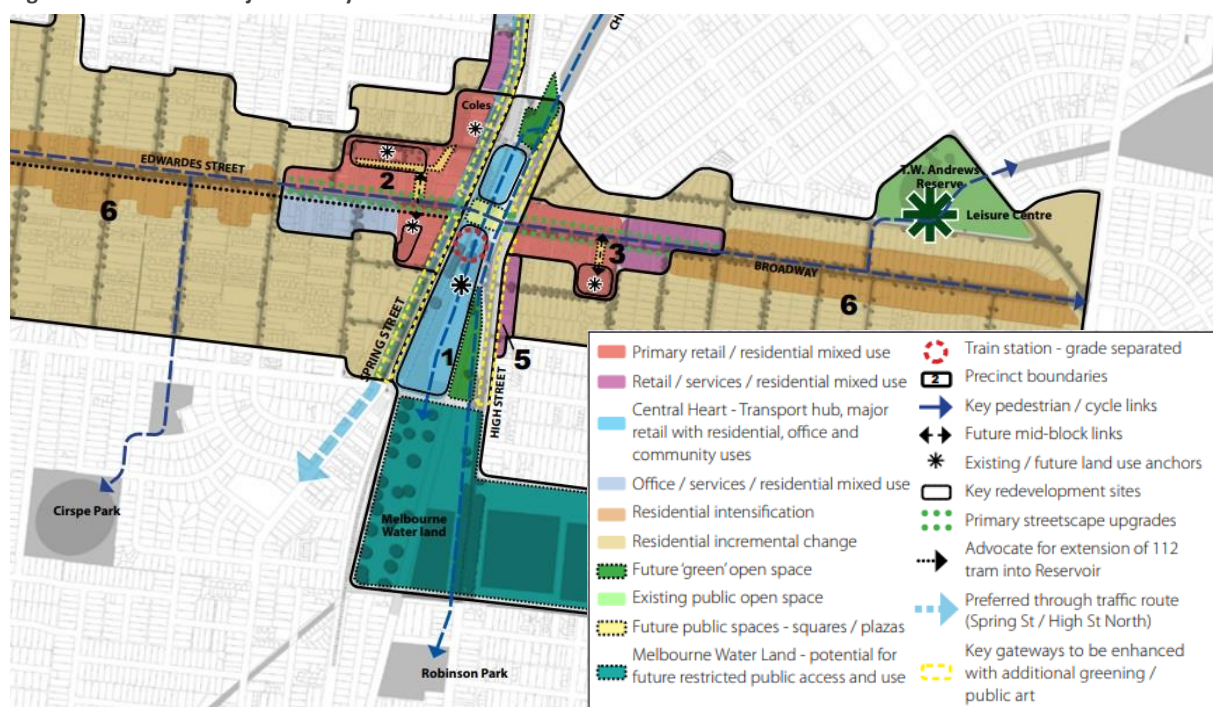
Figure 14: Night time activity cluster



Objective of initiative	Recommendations
<p>Cluster twilight activation in a more confined area to increase vibrancy and activity and leverage connections to public transport.</p>	<ul style="list-style-type: none"> ■ Define a clear night time activity “core area” to focus night to activation and events. Consider concessions to planning controls if night time uses are delivered/provided ■ Work with the private sector to facilitate the delivery of more outdoor dining, small bars and live music venues to create a point of difference ■ Encourage a diversity of uses with extended hours of operation, exploring concessions for businesses that positively contribute to the NTE ■ Consider partnerships with the private sector to deliver events such as regular weekend markets, outdoor cinema, outdoor music performances etc. that encourage people to visit the centre. ■ Investigate opportunities to upgrade the public plaza near the rail station to make it an attractive space for people and better integrate it with the main street.

Case study: Edwardes Street, Reservoir, Melbourne

Figure 15: Reservoir Major Activity Area Framework Plan



Source: Reservoir Structure Plan, 2012

The Reservoir area is located 14 kilometres north of the CBD and approximately 10km south of Melbourne's northern growth corridor. The South Morang rail line and two arterial roads pass through the Reservoir town centre and intersect at the station. The area saw substantial growth during the 1920s, and is characterised by detached houses and single story shops along Edwardes Street. Reservoir is ranked as disadvantaged on the SEIFA index, and is less affluent than State averages. Prior to the release and implementation of the Reservoir Structure Plan, the station's surrounds were characterised by underutilised retail space and a lack of safety or activity during the night. Traditionally, the area's NTE had consisted of small takeaway food parlours and international food restaurants. A masterplan process was part of Council's response to the State Government identifying Reservoir as a major activity area in the city's metropolitan plan.

Council developed planning controls to encourage the consolidation of allotments while ensuring a fine grain pattern of development facing Edwardes Street. They implemented streetscape upgrades that allowed for outdoor dining to occur within footpaths and kerb extension areas, and on short term they undertook a series of small low cost improvements to the area such as weeding of garden beds and high pressure cleaning of footpaths. As part of a community strategy 'Libraries After Dark', the Reservoir Library had its opening hours increased until 8pm and focussed on a series of night-time events such as author talks, craft workshops and discussions. Concurrently, several other shops nearby have extended opening hours including the Coles and the SUPA IGA. These changes have been supported by residential infill development happening on land surrounding the train station.

In 2015, the council worked with local real estate agents, landlords and local business to implement the 'Active Spaces in Darebin' project in vacant shops through the activity centre. The temporary retail offers provided a sense of discovery and attracting visitors to a more diverse retail offering. These Council-led actions have effectively initiated a night-time economy for small retail and community uses in the short to medium term. When the area increases in mixed use intensity as part of a State Government activity centre strategy, a younger demographic is expected to support bars, nightlife and a later night economy.

Intervention 2: Governance and regulation

Governance and regulation are not only about matters of control, but also planning and design that will enable a centre's night-time economy to diversify in terms of spaces, activities and participants³.

The audit identified that there is still a stigma about St Mary's as an unsafe environment, particularly in the evening and at night. There is evidence of anti-social behaviour around some establishments and a police presence in the centre. Implementing night time place making interventions to positively influence the perception of the centre would be encouraged through a strong governance strategy.

Ensuring there is a clear vision and intent for the area and specifying desired outcomes for the night-time economy is important in establishing a clear direction. St Mary's has an active Chamber of Commerce that seeks to enhance the vibrancy and potential of the centre. The Chamber would be suitable in facilitating ongoing events for the centre, however, funding and resourcing would likely be an issue. In collaboration with Penrith City Council, there is an opportunity to apply for state government grants to further improve the safety of the centre and unlock local NTE initiatives. It is likely that Penrith City Council would need to take an active role, in collaboration with the chamber, to facilitate initial catalyst events, rebranding and development incentives.

Businesses should be encouraged to extend their operating hours to 10pm. Extending the trading hours will not necessarily make shops open later. Businesses may raise concerns regarding additional costs to businesses or the lack of customers during extended hours. Therefore, there is a need to simultaneously market the area as a night time precinct to advertise businesses are open and customers can visit in the evening.

Objective of intervention

Facilitate a diverse, active and interesting evening economy that establishes St Mary's as an evening destination.

Intervention considerations

- Undertake a re-branding and marketing exercise to promote St Mary's a safe, vibrant and attractive location for families, couples and friends to meet and socialise
- Explore applying a 'change of use' exemption to allow small bars to operate in restaurants and cafes without a development application
- Enable shops and local businesses to extend their trading hours to 7am to 10pm without an approval. Consider the exemption for grocery stores, clothing stores, bookshops, news agencies, pharmacies, gyms, hair dressers, beauty salons, dry cleaners, travel agents and banks
- Explore family friendly events including night time markets, night time cinemas, music events that are held in public spaces. Make these regular so people know that if they go to the location there will be something on
- Utilise existing Council facilities and land to catalyse night time activities, such as 'Libraries after dark' for author talks, book signings etc.
- Encourage empty shop-fronts to be utilised as pop-up art galleries, restaurant, music venues etc. to activate the street and drive more creative and cultural opportunities.
- Where development occurs around the station or in the night time activity cluster, encourage developers to contribute floorspace that support night time activation.

³ University of Western Sydney, 2008 'The City After Dark - Cultural Planning and Governance of the night-time economy in Parramatta' Centre for Cultural Research

East Atlantic Avenue, Delray Beach, Florida

Figure 16: Atlantic Avenue, Delray Beach, Florida



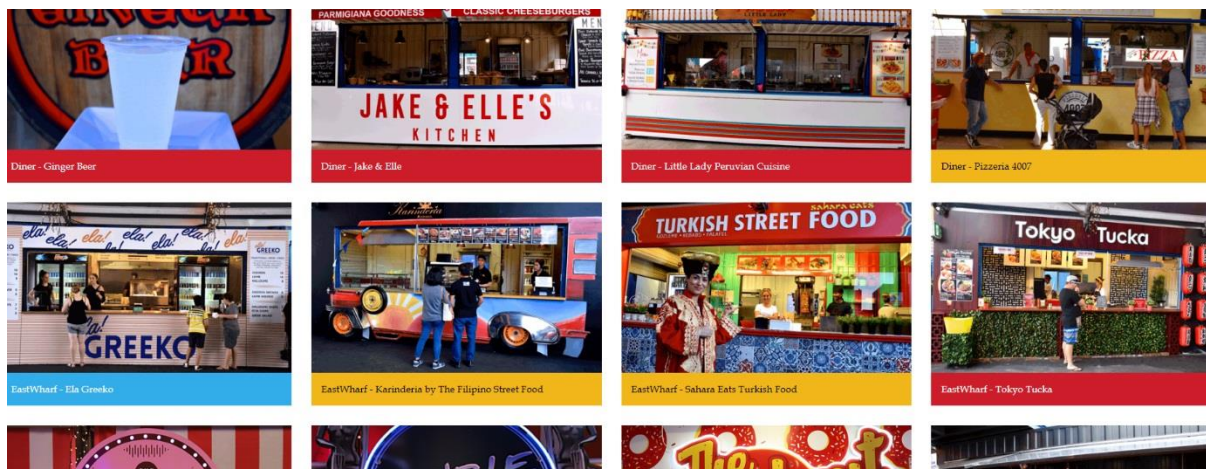
Source: VIP Consulting Group Delray Beach, FL [<https://www.pinterest.com.au/pin/443745369508787247/?lp=true>]

Delray Beach is a city located in the greater Miami metropolitan area. It has been working since 1983 to overturn its reputation as a dangerous town with a dying cultural industry. In the 1980s, Delray Beach was considered dark, unkempt and dangerous. The campaign, led by the Downtown Joint Venture (DJV), divided the city into eight zones, each of which were assigned their own strategy according to their unique needs, one of which was the East Atlantic Avenue area.

The Downtown Join Venture was a conglomerate of the City of Delray Beach, several merchant groups and two development authorities in the municipality. Established in the early 1990s, the DJV began by convening an alliance of key nightlife stakeholder groups in Delray Beach including government agencies, business districts, hospitality businesses, neighbourhood organisations and academic institutions. They organised a procedural system to document data on crime, traffic injuries, disorderly conduct, density of social occupancy, infrastructure (e.g. sidewalk width), parking and transportation services, demographic trends and the economic impact of nightlife. This evidence base and long-term timeframe allowed the Council to change and to create rules to discipline developers as property value rose.

The DJV consulted with the City of Delray Beach to streamline permitting and licensing which increased compliance with regulations and reform licensing. They reformed these licencing changes in tandem with a redevelopment of the East Atlantic Avenue, a stretch of road which in 1993 had 80% vacancy rates. The Council implemented streetscape upgrades including street trees, footpath widening, more bins, and bike racks. They enforced a fifteen metre height limit and large setback requirements along East Atlantic Avenue to maintain a smaller-scale streetscape with plenty of natural light. With support from the merchant groups and tenants, the DJV led a marketing strategy to attract people to the restaurants and bars. Enjoying afternoon meals and sunset drinks along the Avenue has become popular for the older demographic in the northern Miami area. The process of renewal took over 20 years.

Case study: Eat Street Markets



Eat Street Markets aim to promote local food produce, local artists and the artisan food industry by providing a space and curating a regular event to promote all things local. *Eat Street Northshore* was originally a temporary installation to promote those who are passionate about the food they produce, however, has since become a permanent installation open Thursday to Sunday. Entry is \$3 or free for children under 12 years of age.

Food stalls are set up in shipping containers or food trucks on a designated site. Live music and performance stages are then distributed throughout the location providing a festival type atmosphere. The market has become a popular destination for local and visitors and has assisted in the formal launch of a number of companies.



Considering the number of substantial surface car parks located behind Queen Street, there is significant opportunity to curate a regular event, such as an eat street market, that draws people in to the centre on weekends.

Intervention 3: Density within a walkable catchment

Centre performance is intrinsically linked to the density within the trade catchment. Increasing the residential and commercial density of a walkable catchment can enhance the vitality and viability of retail and reduces the reliance of private vehicle trips. A balance of both commercial and residential within the catchment can extend centre activation both during the day and into the evening.

Encouraging a balance of commercial and residential uses in the centre can enhance activation both during the day and night. Workers are imperative to the vitality of the centre during the daytime and early evening hours, where residents increase activation after hours and weekends.

The population of Penrith LGA is projected to increase by around 28.2 per cent over the next 20 years (Forecast Id.). A portion of this growth may be accommodated in or around the study area. Providing increased residential density in locations with strong access to public transport and employment opportunities is encouraged by all levels of government. Increasingly, people are choosing to live in or in close proximity to centres as a lifestyle choice due to the enhanced access to services. There is merit in enabling further infill residential development in or on the fringe of St Mary's main street. New development would also enhance the amenity and feel of the location, particularly if coupled with ground floor active uses that contribute to the day and evening economy.

Increasing the permanent population of residents and workers within the 400-metre catchment of Queen Street would boost centre vitality. It would also enable more people to live closer to jobs if additional commercial floorspace is also delivered in the catchment.

Further opportunities to expand and grow the centre in line with future population projections and associated residential and commercial demand would benefit the centre, contributing to a lively and active place. Provisioning a variety of housing types including affordable options for key workers would encourage greater diversity.

<p>The objective of intervention:</p> <p>Increase the worker and residential population within the trade catchment.</p>	<p>Planning considerations</p> <ul style="list-style-type: none"> ■ Consider allowing a greater density of residential and office space within the walkable catchment to support centre activation ■ The large car parks behind the main street provide a real opportunity for Council to encourage and deliver high quality residential or mixed use outcomes increasing both NTE businesses and residential densities ■ Provision for a mix of housing (including affordable housing) to cater to a diversity of age groups and incomes.
--	--

Intervention 4: Active street frontages

Active street frontages can increase the perceived vibrancy of a centre and optimise surveillance. Where commercial floorspace is over delivered, however, tenancies can be left vacant, having the opposite effect.

As per the Standard Instrument Model Clause active frontages provide:

Continuous business or retail land uses that open directly to the footpath provide active, people-oriented street frontages. It enhances public security and passive surveillance and improves the amenity to the public domain by encouraging pedestrian activity. It can also assist in supporting the economic viability of the centre⁴.

Encouraging outdoor dining along street frontages can enhance the activation of streets and encourage community interaction. The visibility of outdoor dining invites and attracts passing trade, benefiting not only the restaurant but the surrounding retail precinct.

Stakeholder engagement identified that many restaurants in the area were not inclined to have outdoor dining despite the recent streetscape upgrade. Stakeholders identified that this may be due to poor amenity, instances of anti-social behaviour and climate. It was also identified that businesses that were not open in the evening, generally closed roller doors, which further depreciated from the aesthetics of the environment. Street trees and awnings can also create a sense of human scale and intimacy in the environment, providing protection from the weather and improving amenity. Although a number of street trees have been planted, they are yet to reach full maturity and do not have the same aesthetic appeal for the environment. As these trees grow, they will positively contribute to streetscape amenity.

Uses that have higher levels of customer interaction, such as retail and dining, should be encouraged along the main pedestrian thoroughfares, where amenity is stronger. These uses are encouraged to maximise their hours of operation to facilitate vibrant pedestrian thoroughfares for longer periods. Encouraging entertainment uses, bars, restaurants, art galleries and late night shopping that operate after hours can also create more vibrant NTE and contribute to safer environments. More passive service uses such as banks, real estate agencies, showrooms etc. are more appropriate for secondary pedestrian thoroughfares or outside the night time activity cluster. These businesses generally benefit from enhanced business exposure and can activate frontages without taking up premium retail space.

Council can assist in the facilitation of an active street frontage through a number of initiatives.

Objective of intervention	Planning considerations
Encourage active and dynamic frontages along the main pedestrian thoroughfares.	<ul style="list-style-type: none"> ■ Optimise activation by encouraging more active uses such as retail and dining along the high pedestrian thoroughfares with strong amenity. Uses that do not generate active trade should be encouraged to locate above ground level ■ Encourage busking and street performances to add to the vibrancy of the centre ■ Offer incentives for outdoor dining or reducing the cost of footpath permits ■ Street art and lighting installations.

⁴ NSW Government – Model Local Clauses for Standard Instrument LEPs – viewed at: www.planning.nsw.gov.au

Central Fremantle, Perth

Figure 17: Fremantle High Street



Source: Marcel, Swiss Nomads,

[<https://www.swissnomads.com/destinations/oceania/australia/things-to-do-in-fremantle/>];

An evening and NTE is a key strength of the Fremantle City. Situated 19km south-west of Perth, Fremantle is an old port city experiencing unprecedented levels of investment and urban renewal, with a pipeline of about \$1.3 billion. Fremantle's centre hosts a mix of uses, with a strong retail and tourism element, as well as a connection with Notre Dame University.

The assets that have facilitated Fremantle's NTE include:

- Efficient and convenient public transport links
- Diverse and well attended events
- Diverse retail offering that caters for a wider range of budgets
- Attractive heritage market-place hosting speciality night-markets
- Offices in the area help support after-work drinks

The City of Fremantle owns a number of historic buildings in the area, which they have renovated to catalyse strategic projects. An example is the renovation of heritage buildings to establish the Walyalup Aboriginal Cultural Centre and the Kidogo Arthouse in accordance with their arts and culture strategy. This brought early-evening activity in the western end of High Street Fremantle, with more pedestrian traffic in the later hours, especially on weekends. The City of Fremantle pedestrianised some areas along High Street, converted a length to red tarmac and brought in a street artist to design a landmark artwork across several buildings.

These public works established a better pedestrian realm to connect the office and arts buildings in the west end with the central core of Fremantle that already hosted a thriving NTE.

A strong relationship between the University of Notre Dame and the City of Fremantle has been important for supporting local businesses. Notre Dame has expanded its night-school classes, extended library open hours. The University and its residential colleges constitute a large portion of floor space in the western end of Fremantle, and their population supports local pubs, shops and eateries during weekdays.

Undertaking public realm upgrades, committing expenditure to heritage restoration and arts projects has contributed to Fremantle's NTE.

Today, while mid-rise apartment buildings are being steadily approved in the surrounding area (often redevelopments of old car parks), East Atlantic Avenue remains a quaint sanctuary and the NTE is thriving because of the initial plans and ground rules put in place decades prior.

5.1 Key findings from case studies

- Advocating state government agencies to provide more public transport for extended hours can increase activity in the area later at night
- Collaborating with non-government agencies and the police to help deliver services in the late night can be helpful for reducing harm or crime
- Small scale public works and community initiatives can help facilitate an evening activity in the short to long term
- An improved public realm supports on-street evening and night time dining opportunities
- Council-owned facilities can act as land use anchors for night time activities (e.g. library, arts and culture centre)
- A greater intensity of residential, commercial and retail is crucial for establishing a NTE
- Engagement with retail owners or groups is important for securing interest and understanding issues
- Street art, wayfinding and re-painting buildings can be a fast and cost-effective way of place-making
- Establishing a NTE is a long term process, and early-stage master planning is important to direct growth and encourage retail.

Disclaimer

1. This report is for the confidential use only of the party to whom it is addressed ("Client") for the specific purposes to which it refers and has been based on, and takes into account, the Client's specific instructions. It is not intended to be relied on by any third party who, subject to paragraph 3, must make their own enquiries in relation to the issues with which this report deals.
2. HillPDA makes no representations as to the appropriateness, accuracy or completeness of this report for the purpose of any party other than the Client ("Recipient"). HillPDA disclaims all liability to any Recipient for any loss, error or other consequence which may arise as a result of the Recipient acting, relying upon or using the whole or part of this report's contents.
3. This report must not be disclosed to any Recipient or reproduced in whole or in part, for any purpose not directly connected to the project for which HillPDA was engaged to prepare the report, without the prior written approval of HillPDA. In the event that a Recipient wishes to rely upon this report, the Recipient must inform HillPDA who may, in its sole discretion and on specified terms, provide its consent.
4. This report and its attached appendices are based on estimates, assumptions and information provided by the Client or sourced and referenced from external sources by HillPDA. While we endeavour to check these estimates, assumptions and information, no warranty is given in relation to their reliability, feasibility, accuracy or reasonableness. HillPDA presents these estimates and assumptions as a basis for the Client's interpretation and analysis. With respect to forecasts, HillPDA does not present them as results that will actually be achieved. HillPDA relies upon the interpretation of the Client to judge for itself the likelihood of whether these projections can be achieved or not.
5. Due care has been taken to prepare the attached financial models from available information at the time of writing, however no responsibility can be or is accepted for errors or inaccuracies that may have occurred either with the programming or the resultant financial projections and their assumptions.
6. This report does not constitute a valuation of any property or interest in property. In preparing this report HillPDA has relied upon information concerning the subject property and/or proposed development provided by the Client and HillPDA has not independently verified this information except where noted in this report.
7. In relation to any valuation which is undertaken for a Managed Investment Scheme (as defined by the Managed Investments Act 1998) or for any lender that is subject to the provisions of the Managed Investments Act, the following clause applies:

This valuation is prepared on the assumption that the lender or addressee as referred to in this valuation report (and no other) may rely on the valuation for mortgage finance purposes and the lender has complied with its own lending guidelines as well as prudent finance industry lending practices, and has considered all prudent aspects of credit risk for any potential borrower, including the borrower's ability to service and repay any mortgage loan. Further, the valuation is prepared on the assumption that the lender is providing mortgage financing at a conservative and prudent loan to value ratio.

8. HillPDA makes no representations or warranties of any kind, about the accuracy, reliability, completeness, suitability or fitness in relation to maps generated by HillPDA or contained within this report.

Liability limited by a scheme approved under the Professional Standards Legislation



SYDNEY

Level 3, 234 George Street
Sydney NSW 2000
GPO Box 2748 Sydney NSW 2001
t: +61 2 9252 8777
f: +61 2 9252 6077
e: sydney@hillpda.com

MELBOURNE

Suite 114, 838 Collins Street
Docklands VIC 3008
t: +61 3 9629 1842
f: +61 3 9629 6315
e: melbourne@hillpda.com

WWW.HILLPDA.COM

APPENDIX A: CONSULTATION SUMMARY

On Wednesday the 5th of December businesses, stakeholders and the Chamber of Commerce in the St Mary's Town Centre were given an opportunity to participate in a two hour workshop and focus group session regarding the NTE. All businesses in the centre were invited to attend through a letter mailed by Council.

The workshop involved three exercises as outlined below.

1. Brainstorming strengths, weaknesses, opportunities and threats as a group.
2. Mapping answers to the following three questions:
 - a. Where does night time activity currently occur?
 - b. What are the barriers to night time activity?
 - c. What initiatives could be done to improve night time activity/patronage?
3. Defining three words or statements that define St Mary's NTE now and three words of how participants would like to see St Mary's NTE in the future.

A.1 SWOT analysis activity

Strengths	Weaknesses	Opportunity	Threat
<ul style="list-style-type: none"> CCTV Pedestrian lighting Strong public domain / street cleanliness Wide footpaths Good presence of banks New development with ground floor retail Greater options for floor plates New business investment Financial assistance program for shop front improvement has been established Food is tasty Strong take-away economy. 	<ul style="list-style-type: none"> Perception of anti-social activities Chemists do 'take-aways' Needs more diversity of uses Social housing in new development may incur more anti-social behaviour Shop-frontages are fairly poor aesthetically Trees are gone / new growth which exposes the poor frontages Car park near station is known for anti-social behaviour Aesthetics of the shops fronts is poor Not marketing the restaurants adequately More lighting and foot traffic needed Bus shelter doesn't have weather protection Floor plates don't allow big restaurants / entertainment Centre lacks 'overall experience' Surrounding catchment has lower levels of disposable income. 	<ul style="list-style-type: none"> Encourage a more diverse offering of night time uses More and larger trees in the street Family atmosphere at beginning of night Greater diversity – encourage bars, ice cream shops, restaurants Increase density in the walkable catchment Encourage new development in town to renew old shop fronts Create opportunities for families to move to the centre Night time markets More convenience stores Create gateway to the centre at both ends Encourage large function space or bigger restaurants Close to universities – target students as a market Breakdown barriers with land lords. 	<ul style="list-style-type: none"> Takes a long time to encourage change and upgrade of shopfronts Difficult to shift perception Anti-social behaviour including assault, drugs, domestic violence is a deterrent The centre has a stigma (attached to the former clinic) that is hard to get rid of Lack of funding Village is no longer 24/7 Investors who own shopfronts don't live / work in centre Competition from surrounding centres including Penrith, Parramatta Parking is at the back (perception of safety) Safety Local people don't speak highly of St Mary's Attitude is not supportive

A.2 Mapping exercise

Figure 18: Where does night time activity currently occur?

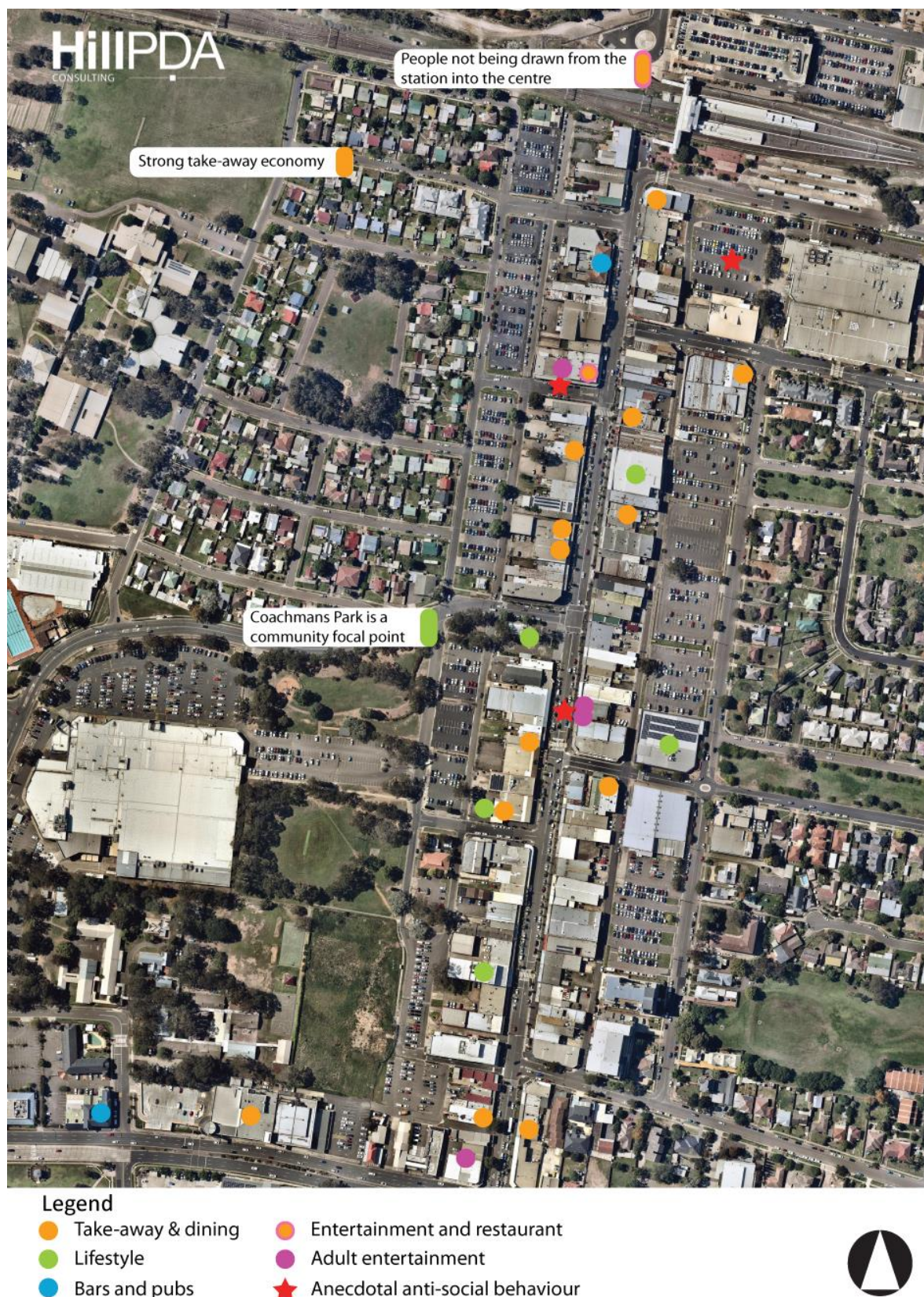


Figure 19: What are the barriers to night time activity?

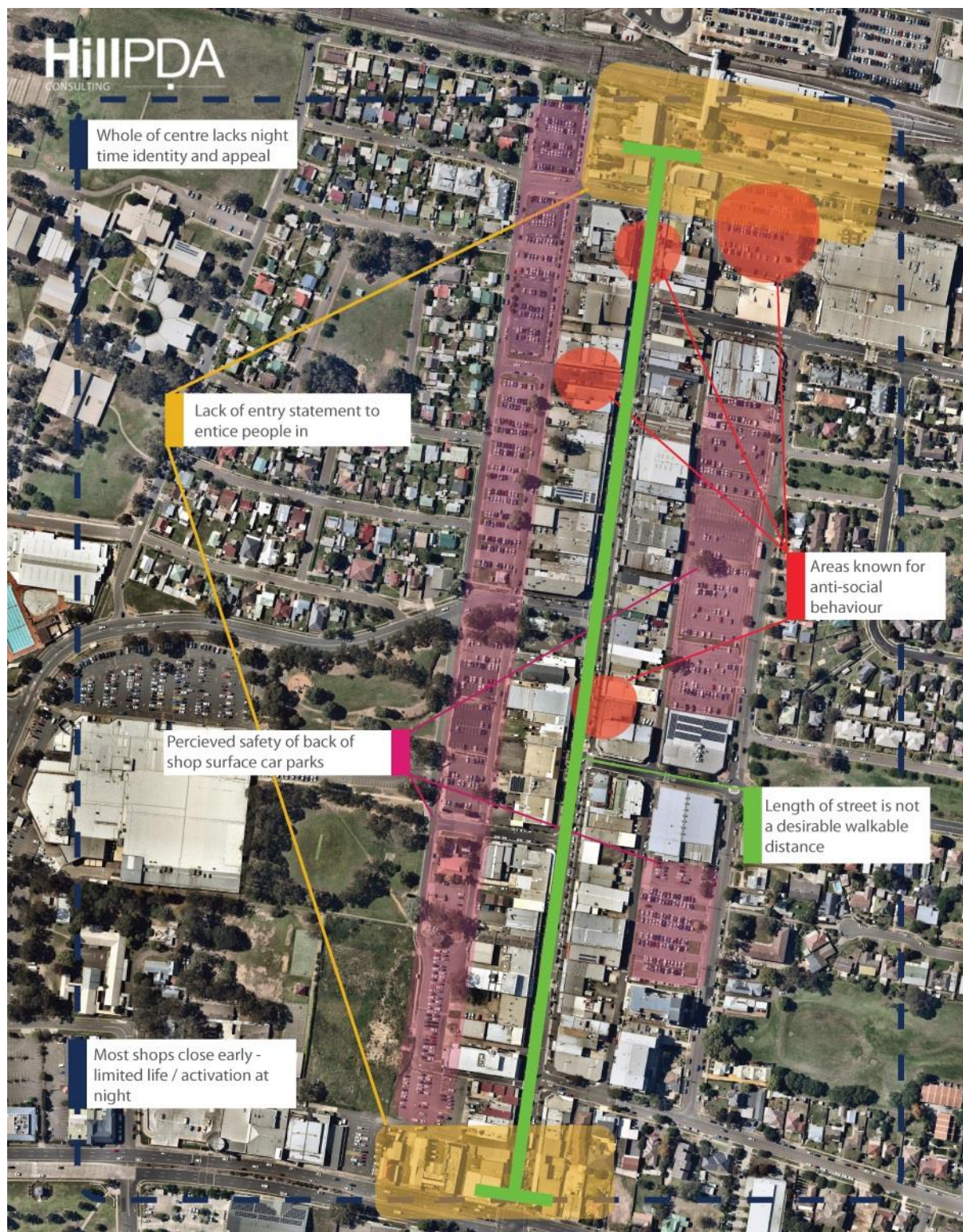


Figure 20: What initiatives could be done to improve night time activity/patronage?



A.3 St Mary's now and in the future

Now	Future
<ul style="list-style-type: none"> • Not attracting visitors due to poor visual appearance • Quiet • Unsafe • No reason to come into St Marys • Rundown • Unsafe perception • Lacks variety / interest • On the brink • Opportunity • Safe and clean • Unique • Small • Shops • Quiet • Old school 	<ul style="list-style-type: none"> • More employment • More attractive to investment • Increased development • Variety • Atmosphere • Safety • Vibrant • Creative hub • More residents • Destination • Vibrant • Trendy • Diverse • Transport hub

A.4 General discussion items

■ General comments

- The construction works to upgrade the streetscape was said to cause a decline in foot traffic.
- If there was higher foot traffic in the evenings, there is anecdotal evidence that more businesses would stay open.
- Competing centres are seen as Mt Druitt, Penrith and Werrington.
- Lack of entertainment facilities for families/family attractors.

■ Current initiatives

- Four community events are held each year at Christmas, Spring, Halloween and Easter. These events have reasonably high patronage with some businesses benefitting and others not.
- Shop front upgrade program already established.

■ Opportunities

- Improve the connection between the town centre and surrounding business areas to create a symbiotic relationship.
- Consider a possible bonus initiative to encourage ground floor NTE tenants.
- Encourage the clustering of night time activities, at the moment they are too spread out.
- The main street needs to strengthen its community related events/offering on a more regular basis. Investigate the opportunity for night markets.
- Opportunity to do multi-storey development over car parks to increase density within the walkable catchment.
- Encourage more outdoor dining, particularly considering the width of the footpaths.
- Deter more adult entertainment establishments from establishing in the town centre, particularly when in proximity to premises that serve alcohol.

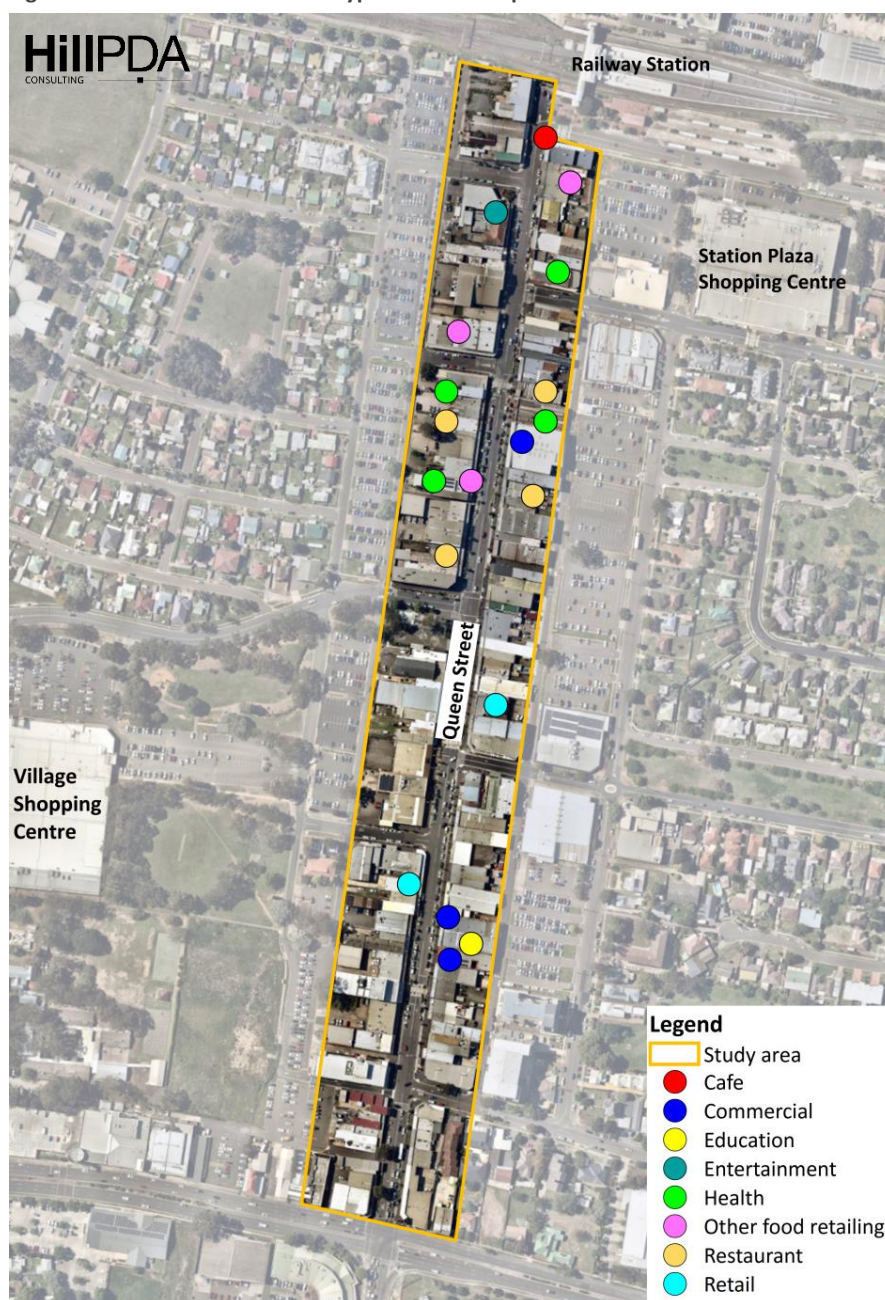
APPENDIX B: ONLINE BUSINESS SURVEY

To capture a wider number of business or those that could not attend the focus group session, an online business survey was developed as part of the consultation process. Each business in the centre was provided with a link to the online survey via a letter mailed out by Council.

In total, 22 businesses completed the survey, with the following being a summary of their responses to the seven questions asked. The results of this survey have been used to inform the SWOT analysis.

The location and type of businesses that responded is provided in the figure below. Please note that there was an additional café respondent, however, they did not provide an address.

Figure 21: Location and business type of online respondents

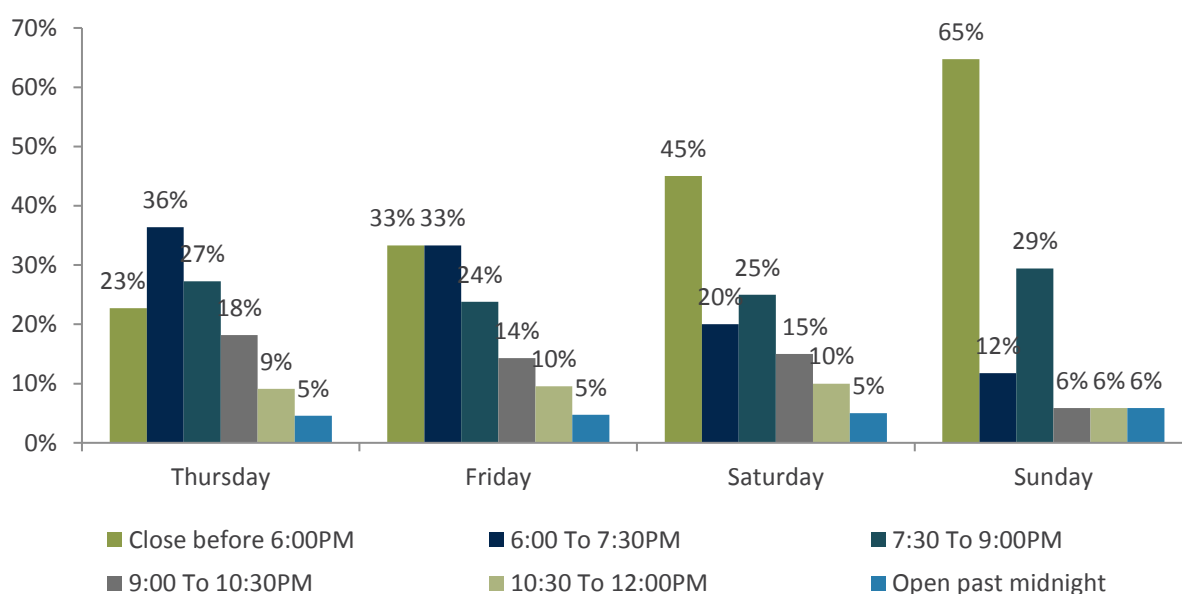


Source: HillPDA

B.1 What time is your business open until, on the following days

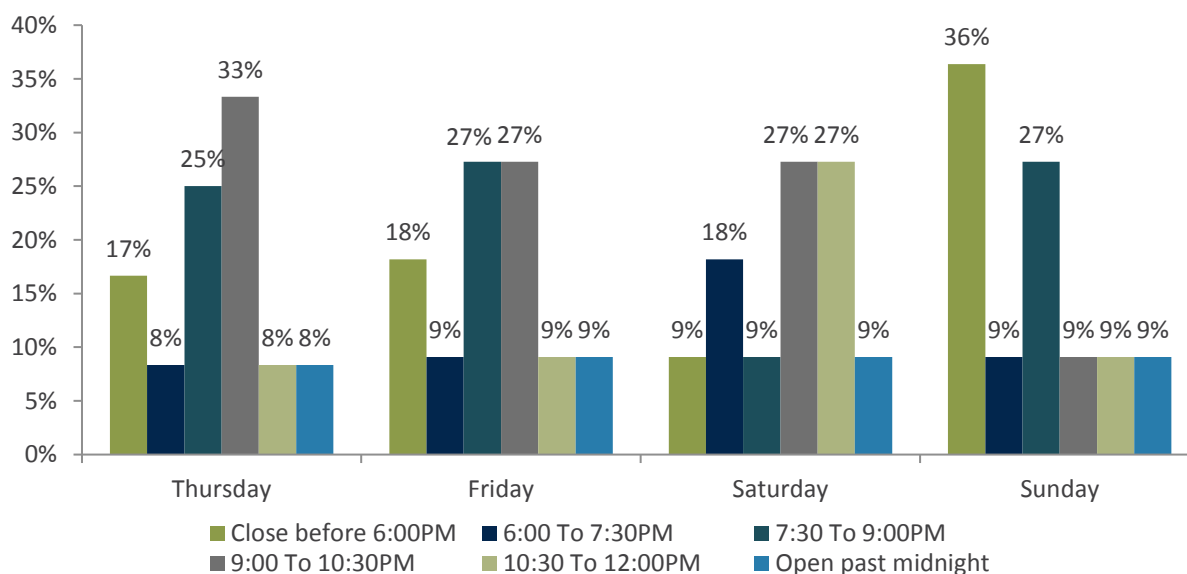
Across the days provided in this question, the rates of businesses that responded ranged between 17 to 22. Of the respondents, the following can be observed:

- Except for Thursday, the majority of businesses closed before 6pm
- Thursday had the highest proportion of businesses open into the evening/late night
- Thursday and Friday had the highest proportion of businesses open between 6pm and 9pm
- Although Sunday had a high portion of businesses open until 9pm (29%), overall it had the lowest proportion of businesses open into the evening/late night.



A closer look at businesses linked to the NTE (cafes, restaurants and gym) identified the following:

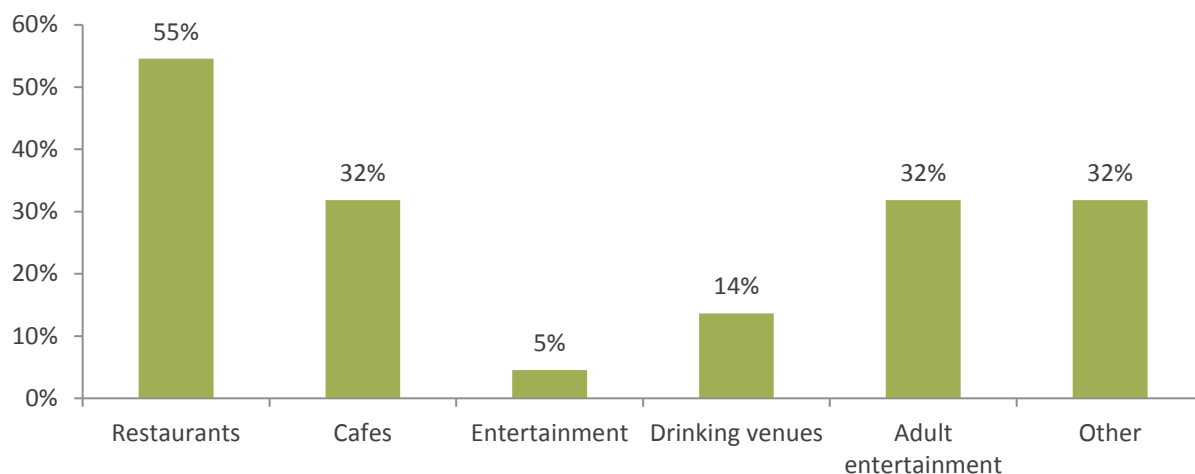
- An increase in the proportion of businesses closing between 7:30pm and 10:30pm
- A slight increase in the proportion of businesses still open past 9pm on Sunday.



B.2 What types of night time activities currently occur in the centre?

All 22 businesses responded to this question. The majority indicated that cafes and restaurants were the main night time activity occurring in the centre (55% and 32% of respondents, respectively). Adult entertainment was also indicated as a major night time activity (32% of respondents).

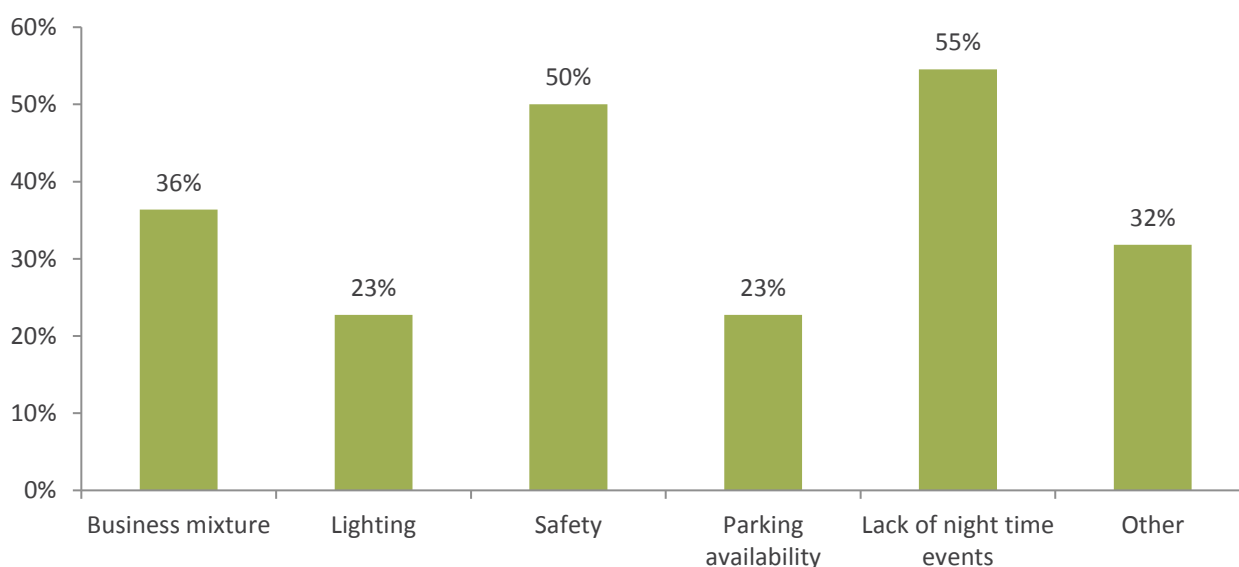
Responses in the other category included: supermarket; shopping; takeaways; and chemists.



B.3 What are the barriers to night time activity

All 22 businesses responded to this question. The majority indicated that the main barriers to night time activity were the lack of night time events (55% of respondents), followed by safety in the centre (50% of respondents) and business mixture.

Responses in the other category included: lack of CCTV surveillance; the area and people; anti-social behaviour including theft, verbal abuse and public drug use; and the ingrained negative stigma of the centre.



A closer look at businesses linked to the NTE (cafes, restaurants and gym) highlights that the lack of night time activation was identified as being the greatest barrier to night time activity. This was followed by the perceived

safety in the centre and business mix. Responses in the other category consisted of the village nature of the centre and “people”.



B.4 What initiatives do you think could be implemented to improve the actual or perceived safety of St Marys in the evening/night time to encourage patronage?

Twenty-one of the businesses responded to this question. Of the responses, there were five main themes, these being:

- Increased security (CCTV, lighting and police presence)
- Increased awareness of security
- Increased number and diversity of cafes and restaurants
- Increased lighting in carparks
- Increased outdoor dining.

APPENDIX C: LAND USE AUDIT MAPS

An audit of the NTE in St Marys was undertaken to assess both the current level of activity, inform the SWOT analysis and provide baseline data for the development of a centre strategy for St Marys.

The map below shows the location and broad type of businesses recorded.

Figure 22: St Marys business audit by category



Source: HillPDA 2018 audit

The figure below present a visual summary of patron activity recorded on Thursday evening. The map shows that the key areas of activity were around St Marys Hotel, the area between Belar Street and Charles Hackett Drive and the western side of Queen Street - south of Crana Street.

Figure 23: Thursday evening patron activity (4pm-10pm)



Source: HillPDA 2018 audit

The figure below present a visual summary of patron activity recorded on Friday evening. The map shows that the key areas of activity were around St Marys Hotel, the area between Belar Street and Charles Hackett Drive and the western side of Queen Street - south of Crana Street.

Figure 24: Friday evening patron activity (4pm-10pm)



Source: HillPDA 2018 audit

The figure below present a visual summary of patron activity recorded on Saturday evening. The map shows that the key areas of activity were around St Marys Hotel, the area between Belar Street and Charles Hackett Drive and the western side of Queen Street - south of Crana Street.

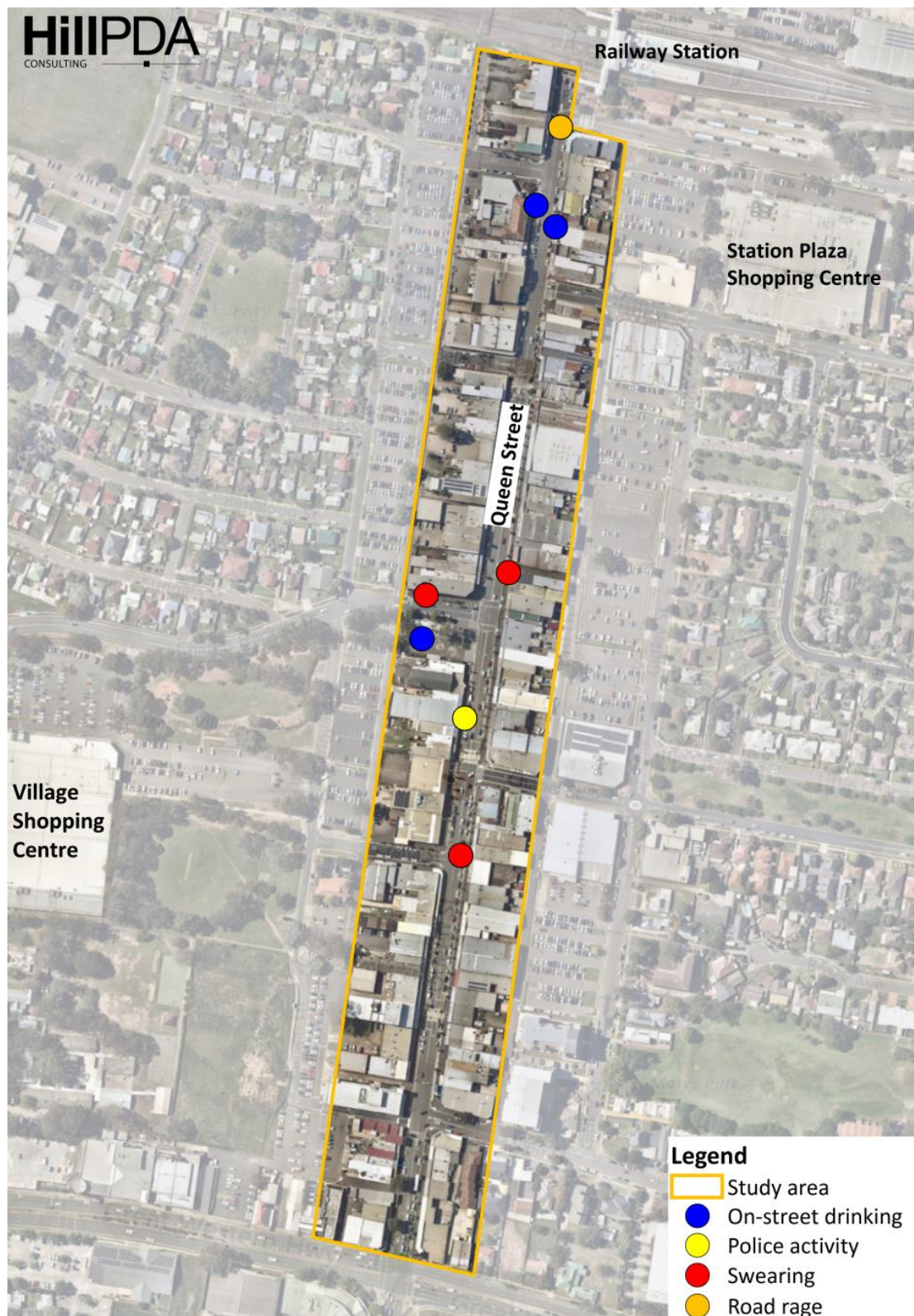
Figure 25: Saturday evening patron activity (4pm-10pm)



Source: HillPDA 2018 audit

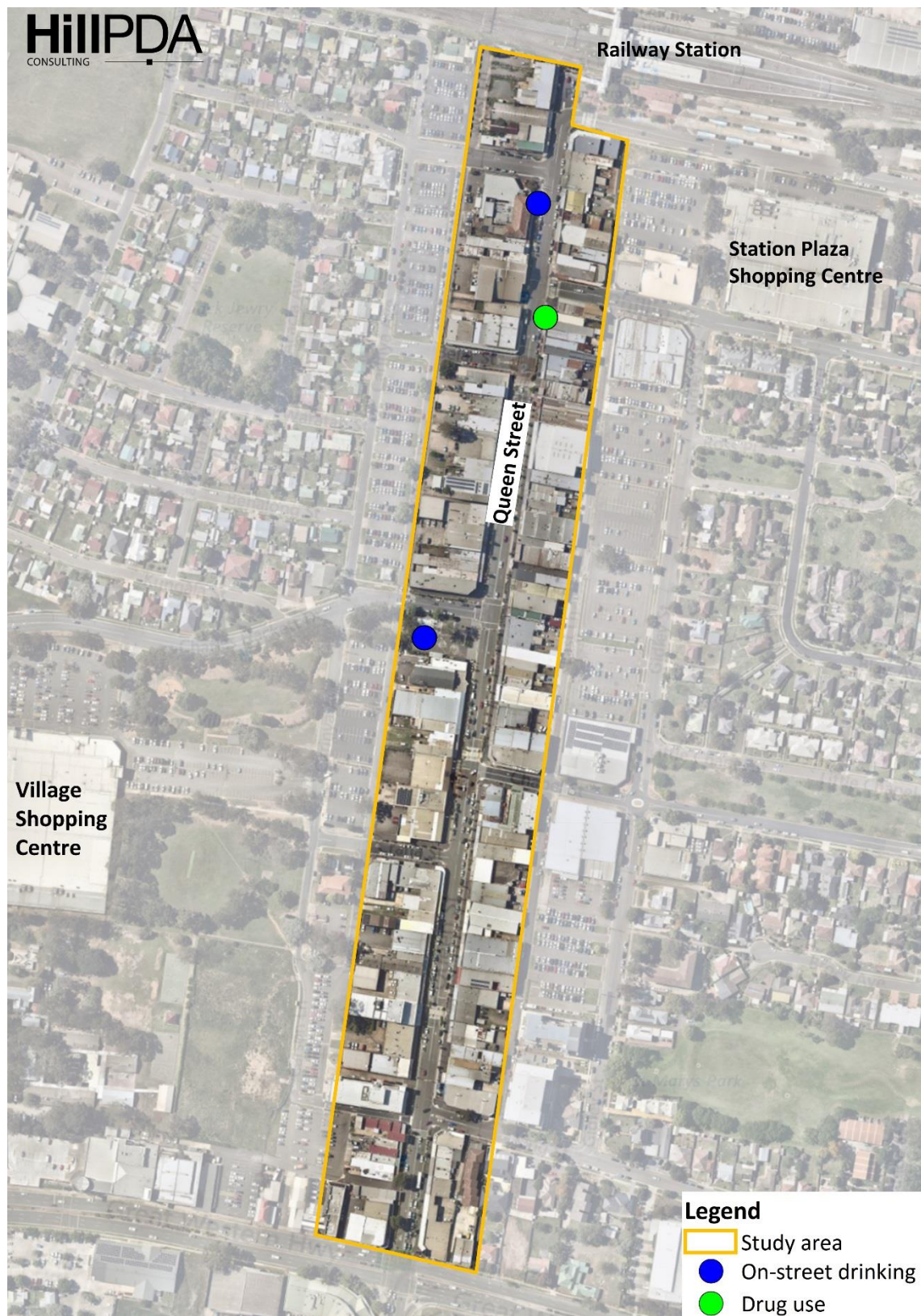
The following maps show and detail anti-social behaviour incidents observed during the land use audit. Please note that no anti-social behaviour incidents were observed during the Saturday evening audit.

Figure 26: Thursday observed anti-social incidents



Source: HillPDA 2018 audit

Figure 27: Thursday observed anti-social incidents



Source: HillPDA 2018 audit