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## **ORDINARY MEETING**

### **Late Items**

Notice is hereby given that a meeting of Burwood Council will be held in the Council Chamber, 2 Conder Street, Burwood on Tuesday 25 July 2023 at 6:00pm

Tommaso Briscese  
**General Manager**

# Agenda

**For an ordinary meeting of Burwood Council  
to be held on 25 July 2023 in the Conference Room, 2 Conder Street, Burwood immediately  
after the Public Forum commencing at 6.00 pm.**

## **General Business**

(Item 52/23)	Draft Economic Development Discussion Paper And Night Time Economy Strategy .....	4
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## **(Item 52/23) Draft Economic Development Discussion Paper and Night Time Economy Strategy**

File No: 23/28386

REPORT BY EXECUTIVE MANAGER PLACE MANAGEMENT & COMMUNICATION

### **Summary**

The Burwood After Dark Strategy (the strategy) sets a long-term vision and a cohesive roadmap for Burwood's night-time economy. Focused on Burwood (referring to Burwood Town Centre and Burwood North area), this Strategy seeks to make the area a more vibrant place with a diverse range of cultural activities, events and entertainment after dark.

This strategy has been informed by the preparation of the Burwood Economic Development Discussion Paper, and extensive community consultation with local residents, businesses and key private and government stakeholders. The implementation of a vibrant, diverse and safe night-time economy in Burwood is contingent on a successful After Dark Strategy. This Strategy explores how this vision can be achieved through four focus areas – Place, Connection, Experience and Destination.

### **Operational Plan Objective**

- C.9 Safe, clean and activated streets, centres and public places are enjoyed by people day and night
- P.34 Facilitate the growth and prosperity of local businesses and target the growth of business sectors and growth industries
- A.79 Undertake activities that support new economic growth in the Burwood North Precinct and Burwood Town Centre
- A.80 Implement activities or initiatives that enhance Burwood's night time economy

### **Background**

Over the past decade, Burwood has experienced substantial growth in the residential, commercial and employment sectors, benefitting from its strategic location between the two CBDs of Sydney and Parramatta. As a result, Burwood has cultivated a vibrant and multicultural night time economy that is out-competing other centres across Sydney.

It is however crucial to strike a balance between residential amenity and commercial growth in the town centre, particularly considering the anticipated population growth in Burwood, which is projected to double by 2041.

In particular, as we look at a post lockdown context and how lifestyles and consumer expectations have changed, now more than ever we need to consider how people want to live, work and play within an increasingly dense and changing suburb.

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. 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 Burwood Town Centre and its surrounds.

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.

## **Proposal**

That Council endorse the Draft Burwood Economic Development Discussion Paper and Draft Night Time Economy Strategy to be placed on public exhibition during the period 26 July 2023 to 6 September 2023.

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 and road-map, underpinned by our community's aspirations around building economic resilience. The draft prospectus will be tabled at the September 2023 Council meeting for endorsement.

## **Consultation**

Important to any project of this scale and context is the ongoing and iterative involvement of community, stakeholders and organisations active within the Burwood LGA and its surrounds.

The Discussion Paper has formed the basis for engagement with the Burwood Community and key stakeholders across Greater Sydney. The feedback received from this engagement was used to develop an After Dark Strategy to direct the future Night Time Economy of the Burwood Town Centre.

As part of the Burwood After Dark Strategy, over 400 participants and 40 businesses were engaged in meaningful conversations about Burwood's late-night potential. Participants were engaged through:

- 2 evening pop-up sessions between 6-8pm
- 1 late night pop-up session between 9:30pm – 12am
- 2 late night intercept surveys between 6pm – 8pm
- 1 workshop with existing businesses
- 2 days interviewing businesses via on-site door knocks
- Multiple in-depth interviews and site meetings with key local and external stakeholders
- Online survey and ideas map

## **Planning or Policy Implications**

The Burwood North precinct is expected to be a hub for residential, commercial, and retail development, with the aim of creating a vibrant, modern, and sustainable community. The area is likely to see the development of new residential and commercial buildings, as well as the upgrading of existing infrastructure and public spaces as a result of the new metro line and recently finalised WestConnex. The aim of the renewal is to create a more liveable, connected, and diverse community that meets the needs of residents, businesses, and visitors.

Council recognises the importance of this precinct to the town centre. A key component of these strategic documents was to understand its relationship to the town centre, and how learnings from this project can be applied and considered for future late night venues located within Burwood North.

This Strategy also builds on existing Council work and progresses outcomes from extensive desktop research and direct community consultation delivered as part of this project. Further to these documents, this Strategy sits within a broader strategic context and considers the input of the following strategies at both a local and State government level.

Burwood Council:

- Burwood 2036: Community Strategic Plan (CSP)
- Burwood Local Strategic Planning Statement (LSPS)
- Research into Local Employment and Investment in Burwood
- Burwood Place Management Framework (in development)



NSW Government:

- Greater Sydney 24-hour Economy Strategy
- Future Transport Strategy
- NSW Visitor Economy Strategy 2030

### **Financial Implications**

Council has engaged a consultant to assist with the preparation of these strategic documents. This engagement has been funded through Council's operating budget (Place Management) and grant funding (Burwood North Precinct Project).

A financial allocation of \$40,000 has also been made towards Economic Development activities in the 2023-24 financial year.

### **Conclusion**

Burwood is expanding its after dark identity. Recent population growth, an emerging destination identity, and future transformative urban projects are helping push our night time economy to the next level. With this evolving transformation, a bold vision for Burwood's night-time economy is in order. This After Dark Strategy heralds that change.

By recognising the inherent value of our evening hours and building upon the insights gained from the Economic Development Discussion Paper, we are poised to unlock the true potential of Burwood's night time economy. With strategic planning, collaboration, and a focus on enhancing cultural and entertainment offerings, we aim to create an inclusive and thriving after-dark atmosphere that not only stimulates economic growth but also fosters a sense of pride and connection within our community.

### ***Recommendation(s)***

That Council:

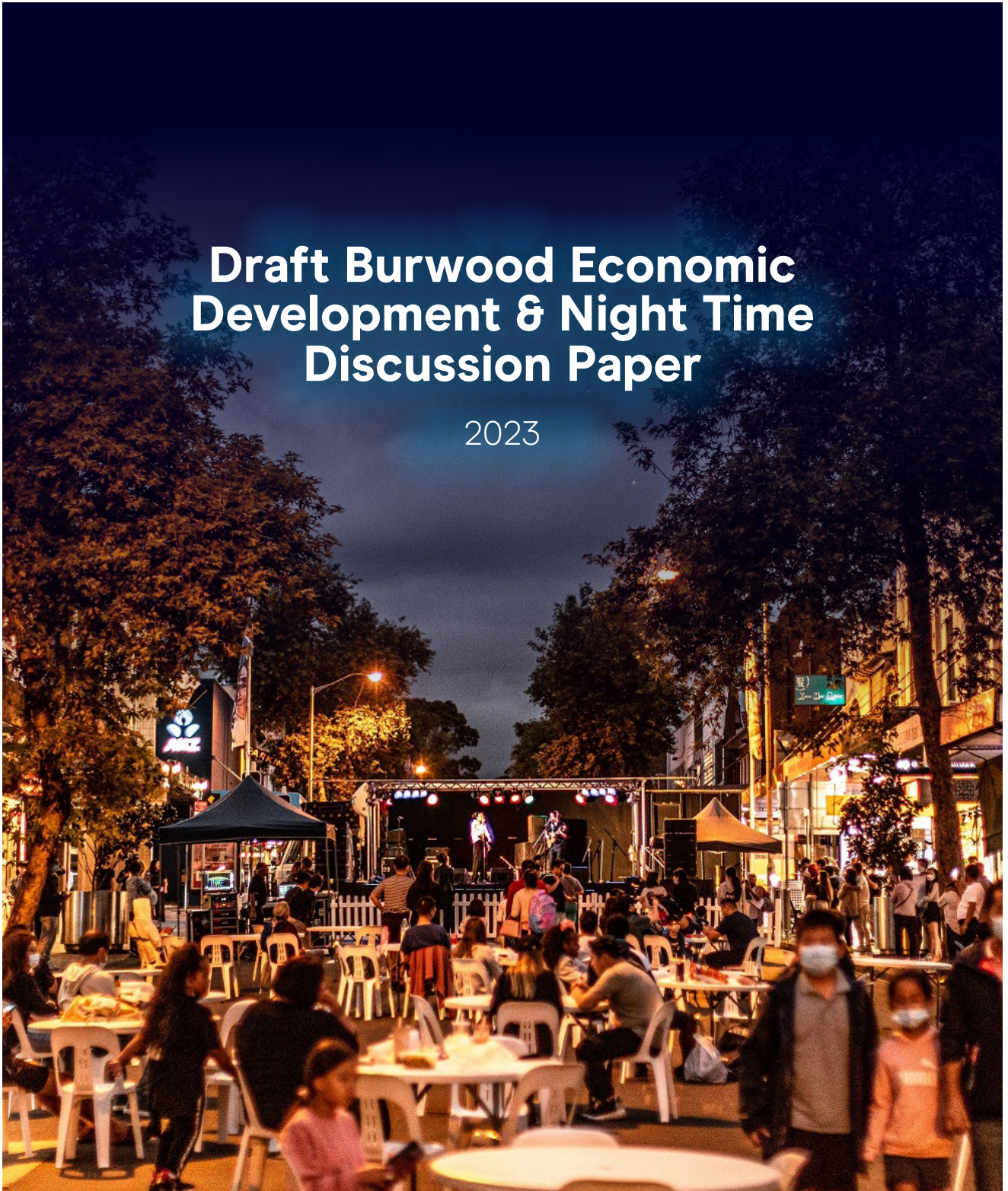
1. Adopt the Draft Economic Development Discussion Paper 2023 for public exhibition
2. Adopt the Draft Burwood After Dark Strategy 2023 – 2028 for public exhibition

### **Attachments**

- 1   Draft Economic Development Discussion Paper - July 2023
- 2   Draft Burwood After Dark Strategy - July 2023

# Draft Burwood Economic Development & Night Time Discussion Paper

2023



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## Acknowledgment of Country

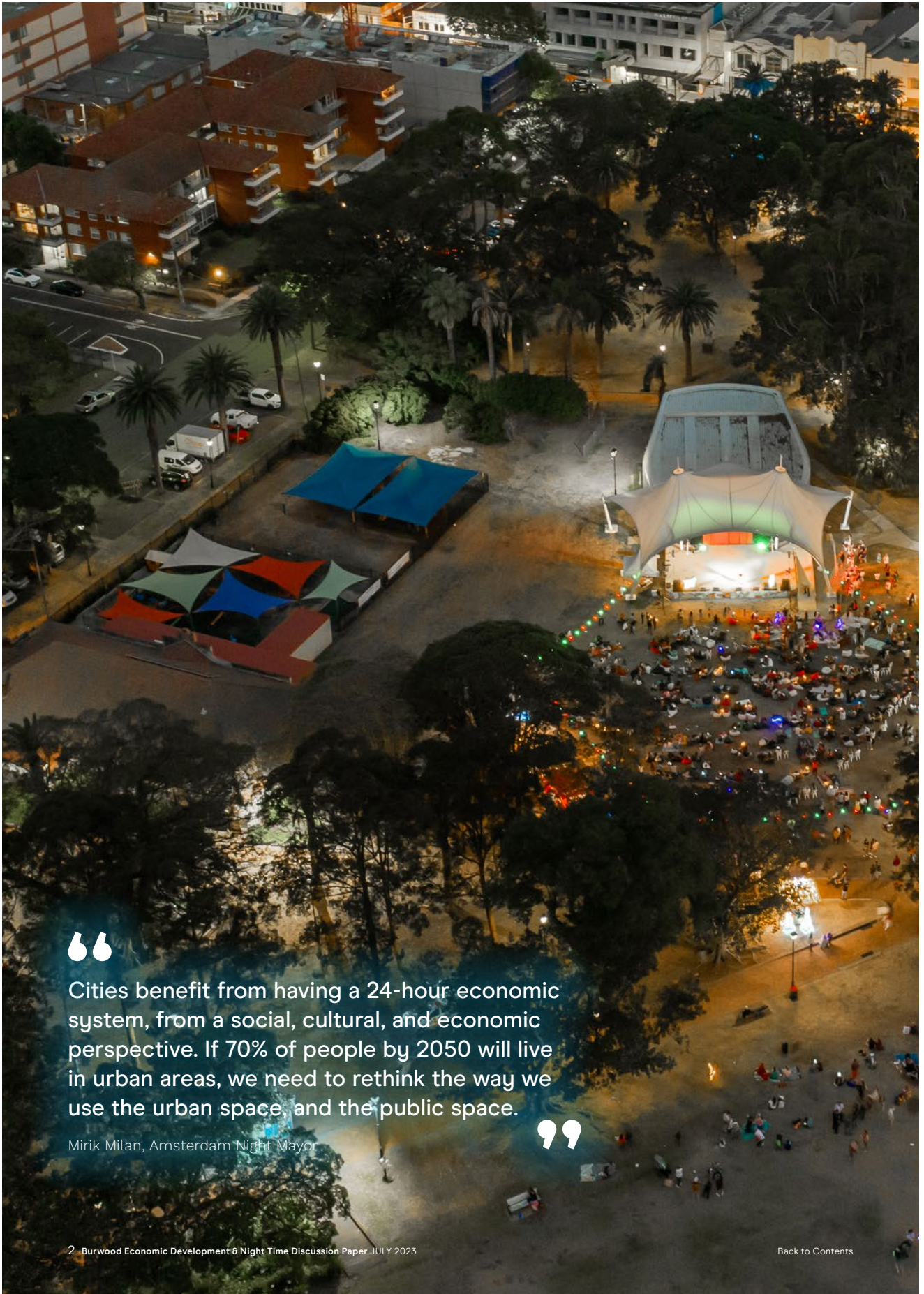
Burwood Council acknowledges the Wangal Clan of the Eora Nation, the traditional custodians of the lands in which the Burwood Local Government Area is located.

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

<b>Executive summary</b>	<b>3</b>	<b>Market overview</b>	<b>32</b>	<b>Where do we want to be?</b>	<b>58</b>
<b>Introduction</b>	<b>4</b>	Market conditions summary	32	<b>Barrier identification</b>	<b>60</b>
Purpose of this paper	4	Statistical analysis of night time & visitor economy	32	Background research	60
Our approach	4	Accommodation and short term rental analysis	33	Community Consultation	62
Study area	5	<b>How do we compare?</b>	<b>34</b>	<b>References</b>	<b>64</b>
Snapshot of Burwood	6	<b>Burwood's night time economy</b>	<b>39</b>	<b>Appendix A – Economic and market analysis</b>	<b>65</b>
Employment snapshot	8	<b>Our night time economy</b>	<b>40</b>	Economic overview	66
<b>How do we participate after dark?</b>	<b>11</b>	Place identity and activity	40	Market overview	68
Our people	12	Burwood's late night sub-precincts	41	How do we compare?	71
Drivers of change	14	Burwood Road Eat Street	42	Haymarket (Chinatown), Sydney	72
<b>What is the night time economy?</b>	<b>16</b>	Entertainment Central	43	Hurstville, Sydney	74
Night time business classifications	17	Cultural Quarter	44	Degraves Street & Flinders Lane, Melbourne	76
Opening hour classifications	17	Commercial Hub	45	Camden Town, London	78
Benefits of a night time economy	18	Innovation Hub	46	Melrose & Fairfax Avenues, Los Angeles	80
<b>Background research</b>	<b>19</b>	Starry Civic Green	47	Jalan Petaling, Kuala Lumpur	82
<b>How does this align with Council?</b>	<b>20</b>	<b>How are we changing?</b>	<b>48</b>	<b>Appendix B – Definitions</b>	<b>84</b>
Strategic document review	20	The future of Burwood	48		
NSW Government alignment	21	Key transformative projects	48		
The Last Lion mural	22	<b>Local-scale initiatives</b>	<b>50</b>		
Location & transport analysis	23	Projects & initiatives map	52		
<b>Economic overview</b>	<b>28</b>	<b>Recommendations and next steps</b>	<b>53</b>		
Macro-economic conditions	28	SWOT analysis	54		
Retail trends	29	Planning control and policy	55		
Broader night time economy conditions	29				





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.



### 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

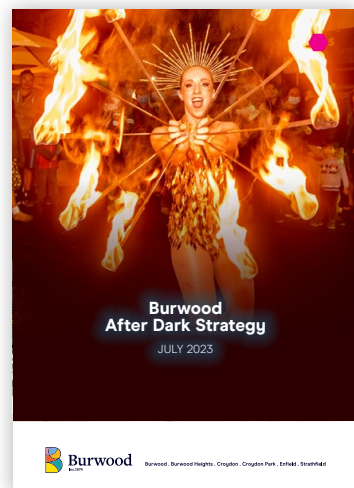
This Discussion Paper will form the basis for engagement with the Burwood Community and key stakeholders across the Town Centre and Greater Sydney. The feedback received from these engagement sessions has been used to develop an After Dark Strategy to direct the future Night Time Economy of the Burwood 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.

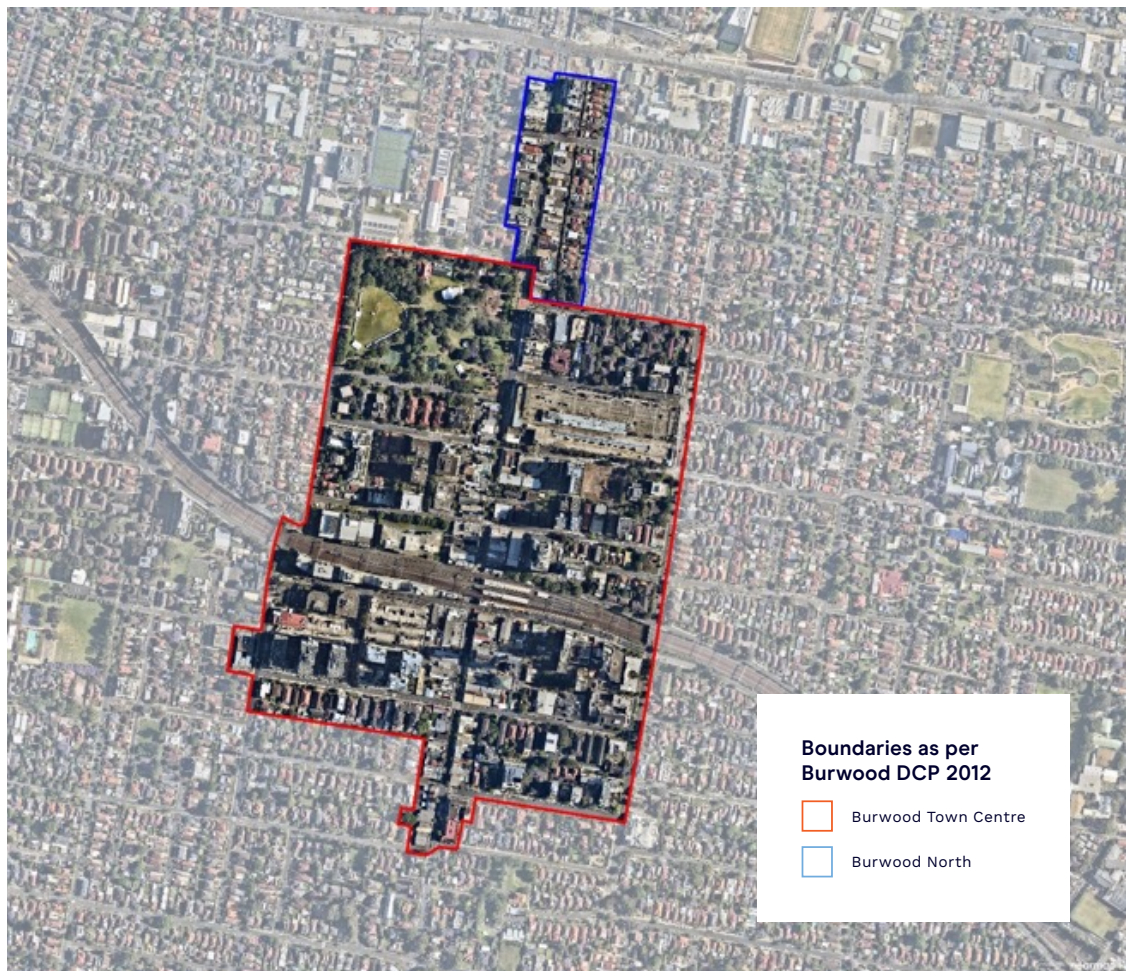


Figure 1: Study Boundaries

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.

### 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

ECONOMICS

## \$2.83b


Gross Regional Product (2021)

## 15.5%

Live and work in the area (2016)

## 37.8%

University qualification (Bachelor Degree or higher)



### People

# 40,397

### Median age

# 34 years


### Population density

5,651 people per km<sup>2</sup>

### 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%

## PEOPLE

## 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

[Back to Contents](#)

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 of dwellings **65.7%** 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**



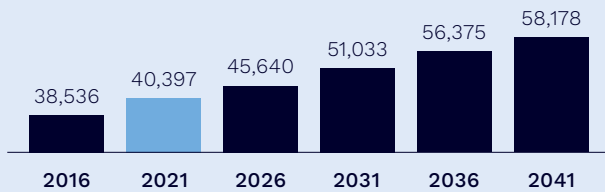
Family composition

- 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

Burwood Population Forecast



People

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



# 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.

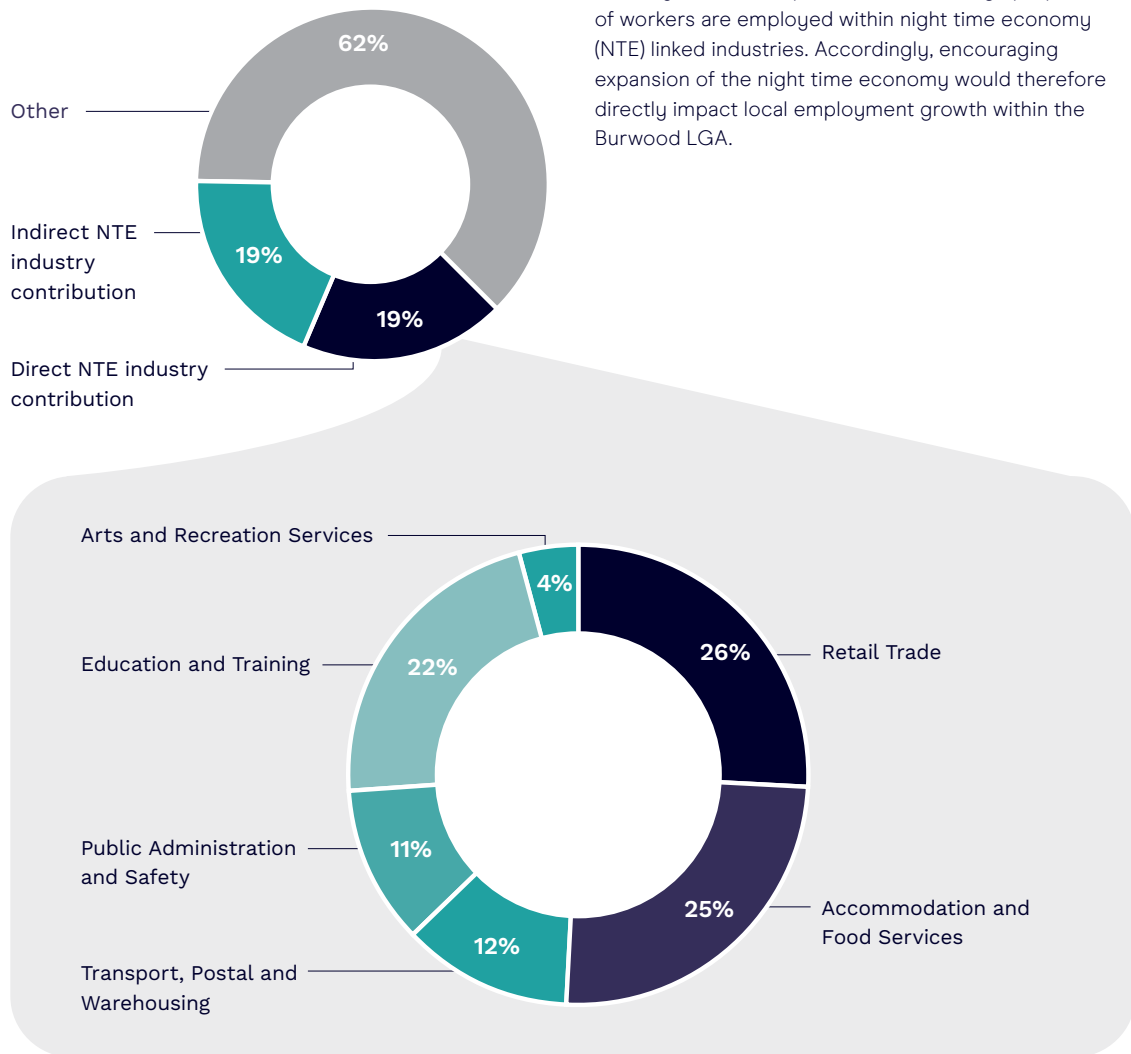


Figure 2: Employed Residents in the Burwood LGA  
 Source: Australian Bureau of Statistics, 2021



### 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%
<b>Total</b>	<b>1475</b>	<b>100%</b>	<b>2827</b>	<b>100%</b>



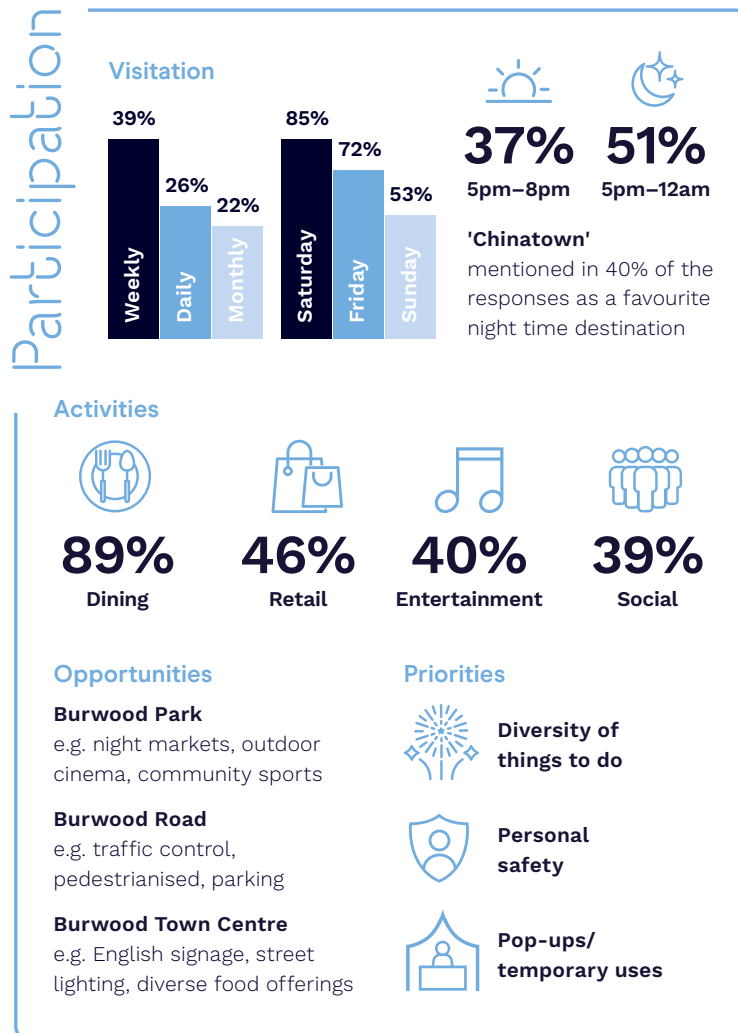


39% of participants visit Burwood Town Centre weekly, commonly for dining, retail, entertainment, and social activities.

# 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.



Source: Burwood After Dark Strategy Survey 2022

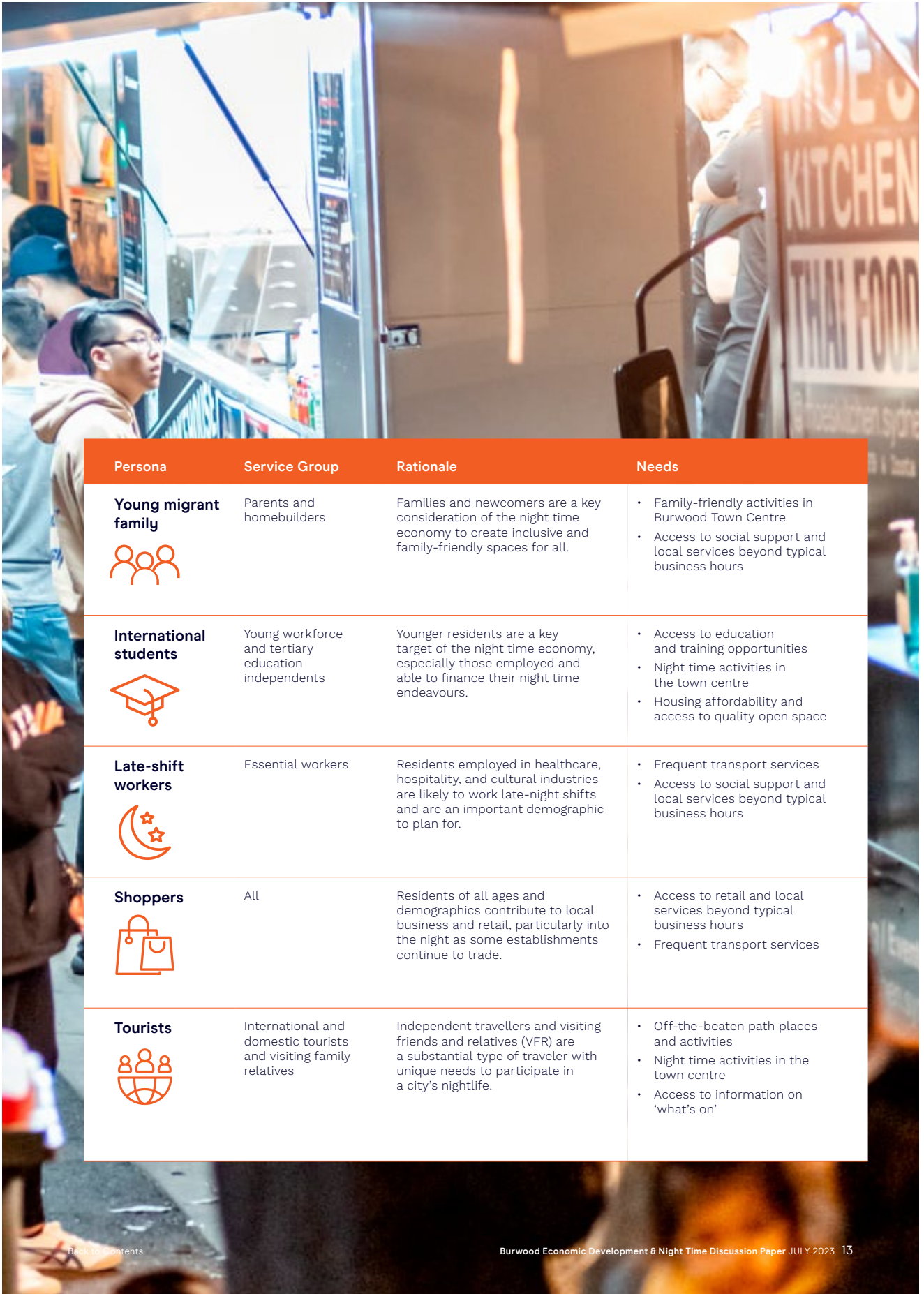











## Our people

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
<b>Young migrant family</b> 	Parents and homebuilders	Families and newcomers are a key consideration of the night time economy to create inclusive and family-friendly spaces for all.	<ul style="list-style-type: none"> <li>Family-friendly activities in Burwood Town Centre</li> <li>Access to social support and local services beyond typical business hours</li> </ul>
<b>International students</b> 	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.	<ul style="list-style-type: none"> <li>Access to education and training opportunities</li> <li>Night time activities in the town centre</li> <li>Housing affordability and access to quality open space</li> </ul>
<b>Late-shift workers</b> 	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.	<ul style="list-style-type: none"> <li>Frequent transport services</li> <li>Access to social support and local services beyond typical business hours</li> </ul>
<b>Shoppers</b> 	All	Residents of all ages and demographics contribute to local business and retail, particularly into the night as some establishments continue to trade.	<ul style="list-style-type: none"> <li>Access to retail and local services beyond typical business hours</li> <li>Frequent transport services</li> </ul>
<b>Tourists</b> 	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.	<ul style="list-style-type: none"> <li>Off-the-beaten path places and activities</li> <li>Night time activities in the town centre</li> <li>Access to information on 'what's on'</li> </ul>



# 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%)<sup>1</sup> 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%)<sup>2</sup>.

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<sup>3</sup>. Of those overseas arrivals, 33% arrived between 2016 to 2021 showing a recent surge of overseas arrivals<sup>4</sup>. 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<sup>5</sup> 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<sup>2</sup> of floor space<sup>6</sup>. Based on current trends, it is forecasted that there will be demand for an additional 52,780m<sup>2</sup> of floor space by 2036, or a 61% increase on the current retail floor area<sup>7</sup>. 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<sup>8</sup>.

**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<sup>9</sup>. 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.

<sup>9</sup> Burwood Local Housing Strategy, SGS Economics (2020)

<sup>10</sup> Burwood Local Housing Strategy (2020)

<sup>11</sup> Burwood Local Housing Strategy (2020)

<sup>12</sup> City Shaping Impacts of COVID-19, Greater Sydney Commission (2020)

<sup>13</sup> 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<sup>10</sup>, 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.

<sup>14</sup> InvestmentNSW, 2020 – Greater Sydney 24 Hour Economy Strategy.

<sup>15</sup> Australian Bureau of Statistics, 2019 – Apparent Consumption of Alcohol, Australia between 2017-18 Financial Year.

<sup>16</sup> Australian Institute of Health and Welfare, 2016 – National Drug Strategy Household Survey 2016: detailed findings.

<sup>17</sup> 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<sup>13</sup>, Residents of Sydney are demanding more late night activities that do not centre around alcohol, and allow them to socialise in more intimate settings<sup>14</sup>.

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<sup>15</sup>. In 2016 it was identified that Australians aged between 18 and 24 are drinking less frequently than those in older age categories<sup>16</sup> and the range of non-alcoholic late night businesses and activities was expanding<sup>17</sup>.

**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<sup>18</sup>:

- **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<sup>19</sup>. 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<sup>20</sup>.



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



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'<sup>21</sup>:

- **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)\*

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

<sup>18</sup> Sydney 24-Hour Economy Strategy, Investment NSW, 2020.

<sup>19</sup> Night Time Economy Strategy, City of Ryde, 2016.

<sup>20</sup> 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

#### 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

### Supporting

*\*Category adapted by Burwood Council from industry best-practice*

## 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<sup>22 23 24</sup>



<sup>22</sup> VisitEngland – *The Night Time & Evening Economy – Realising the potential for Destination Organisations*, 2012.

<sup>23</sup> NYC's *Nightlife Economy, Impact, Assets, and Opportunities – The Mayors Office of Media & Entertainment*, 2019.

<sup>24</sup> *Sydney Night Time Economy: A Cost Benefit Analysis*, City of Sydney 2011.

<sup>25</sup> VisitEngland – *The Night Time & Evening Economy – Realising the potential for Destination Organisations*, 2012.

<sup>26</sup> NYC's *Nightlife Economy, Impact, Assets, and Opportunities – The Mayors Office of Media & Entertainment*, 2019.

<sup>27</sup> *Sydney Night Time Economy: A Cost Benefit Analysis*, City of Sydney 2011.

<sup>28</sup> *Creating a Healthy Night-Time Economy: Key Culture Indicators for World Cities*, World Cities Culture Forum 2020.

## Economic Benefits

The night time economy is recognised as making a significant contribution to the wider city and national economy. Research from London<sup>25</sup>, New York<sup>26</sup> and Sydney<sup>27</sup> 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<sup>28</sup>.



# 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







## 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<sup>29</sup>.

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<sup>30</sup>.

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
<b>Final arrival</b>	1:30am (Saturday night, T1) 12:39am (Wednesday night, T2)	1:58am (Saturday night, N61) 2:07am (Wednesday night, N60)
<b>Final departure</b>	1:05am (Saturday night, T9) 12:21am (Wednesday night, T9)	1:49am (Saturday night, N60) 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<sup>31</sup>

<sup>29</sup> Memorandum – Burwood Town Centre – Traffic and Transport Opportunities and Constraints, AECOM, 2015.

<sup>30</sup> Based on TripPlanner data, 2023.

<sup>31</sup> 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<sup>32</sup>.

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

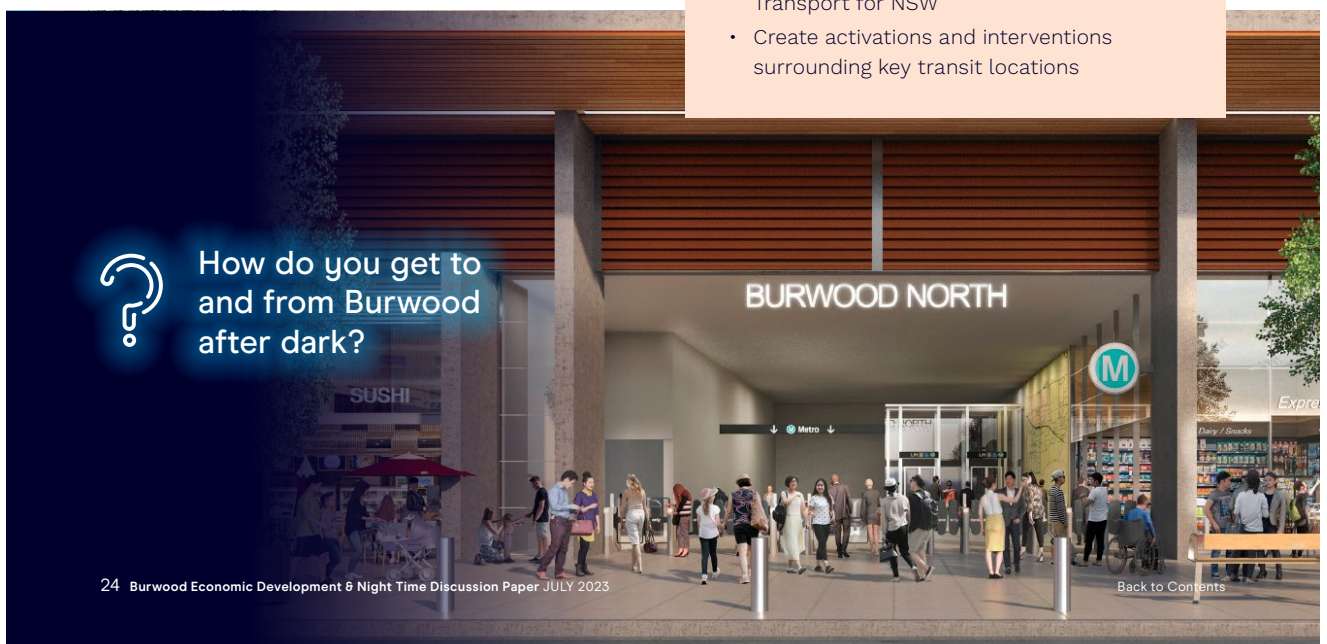
Micromobility is emerging as an informal transport mode focused on the use of small, lightweight vehicles for individual use, such as bicycles, e-bikes, and scooters. Bicycle routes (i.e. dedicated bicycle lanes, shared paths for use by pedestrians and cyclists, roads with mixed traffic lanes) are not 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<sup>33</sup>.

## 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



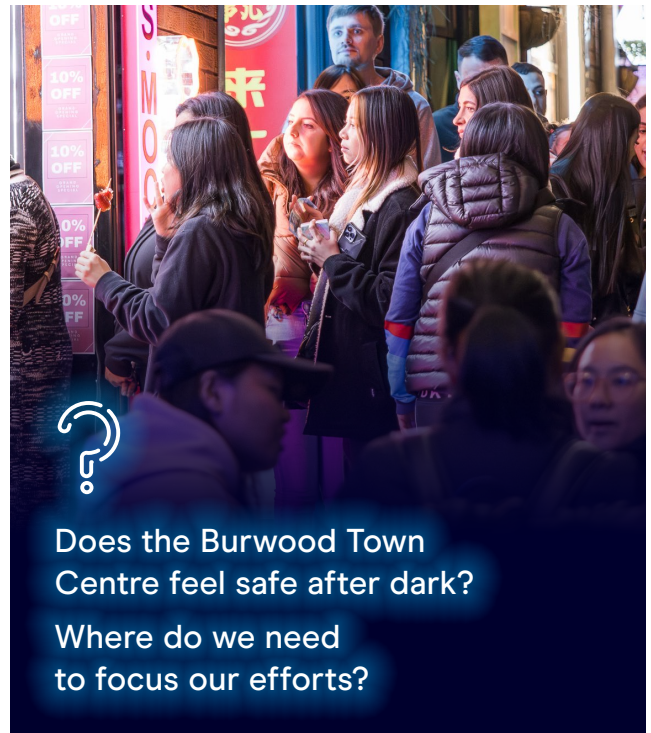
## Safety at Night

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<sup>35</sup>.

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<sup>36</sup>.

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)

The Burwood Town Centre is identified as a hotspot for incidents of non-domestic assault within the LGA. **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.

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

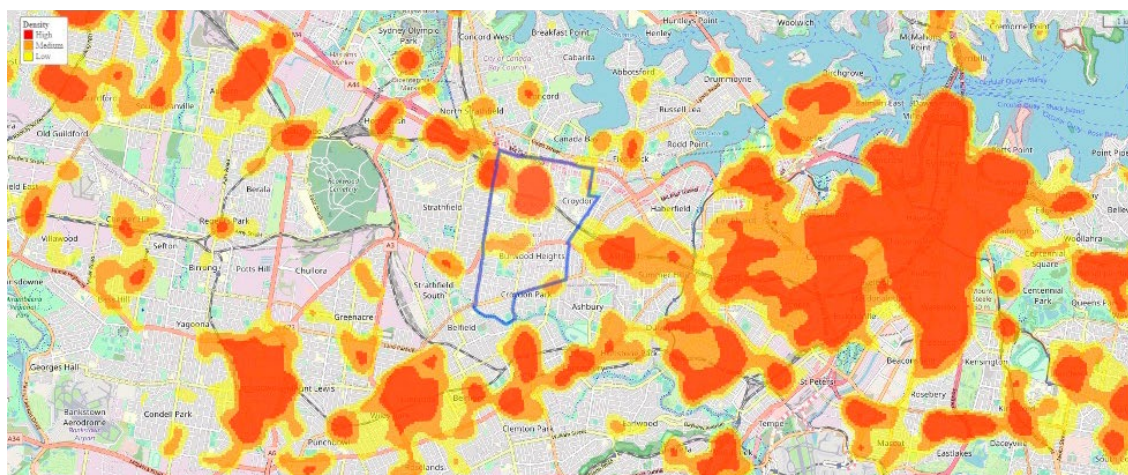


Figure 4: Incidents of Assault (Non-domestic) in Burwood (Jan 2022 to Dec 2022)  
 Source: BOSCAR 2022



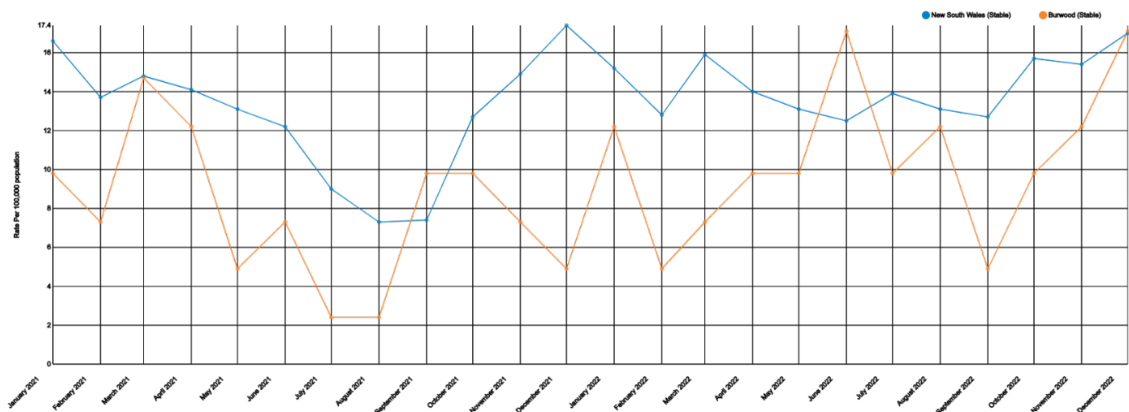


Figure 5: Incidents of Assault (Non-domestic) occurring at night in Burwood (Jan 2022 to Dec 2022)  
Source: BOSCAR 2022

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

As identified, the Burwood Town Centre is a hotspot for incidents of malicious damage to property. Despite this, rates of incidents are nearly half that of the NSW average.

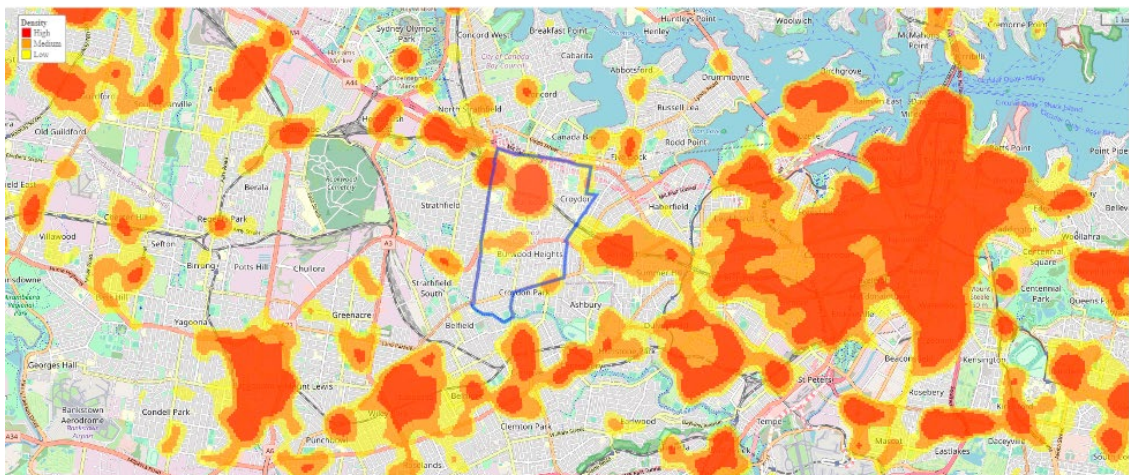


Figure 6: Incidents of Malicious damage to property in Burwood (Jan 2022 to Dec 2022)  
Source: BOSCAR 2022

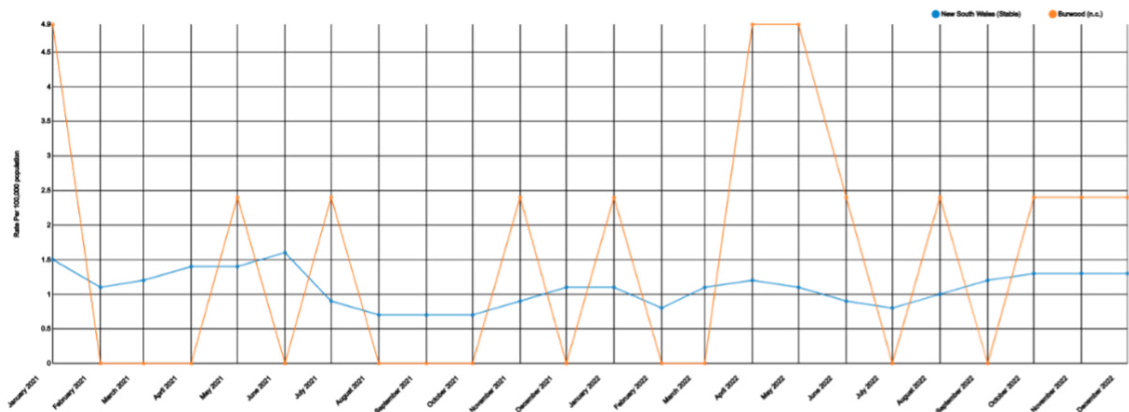
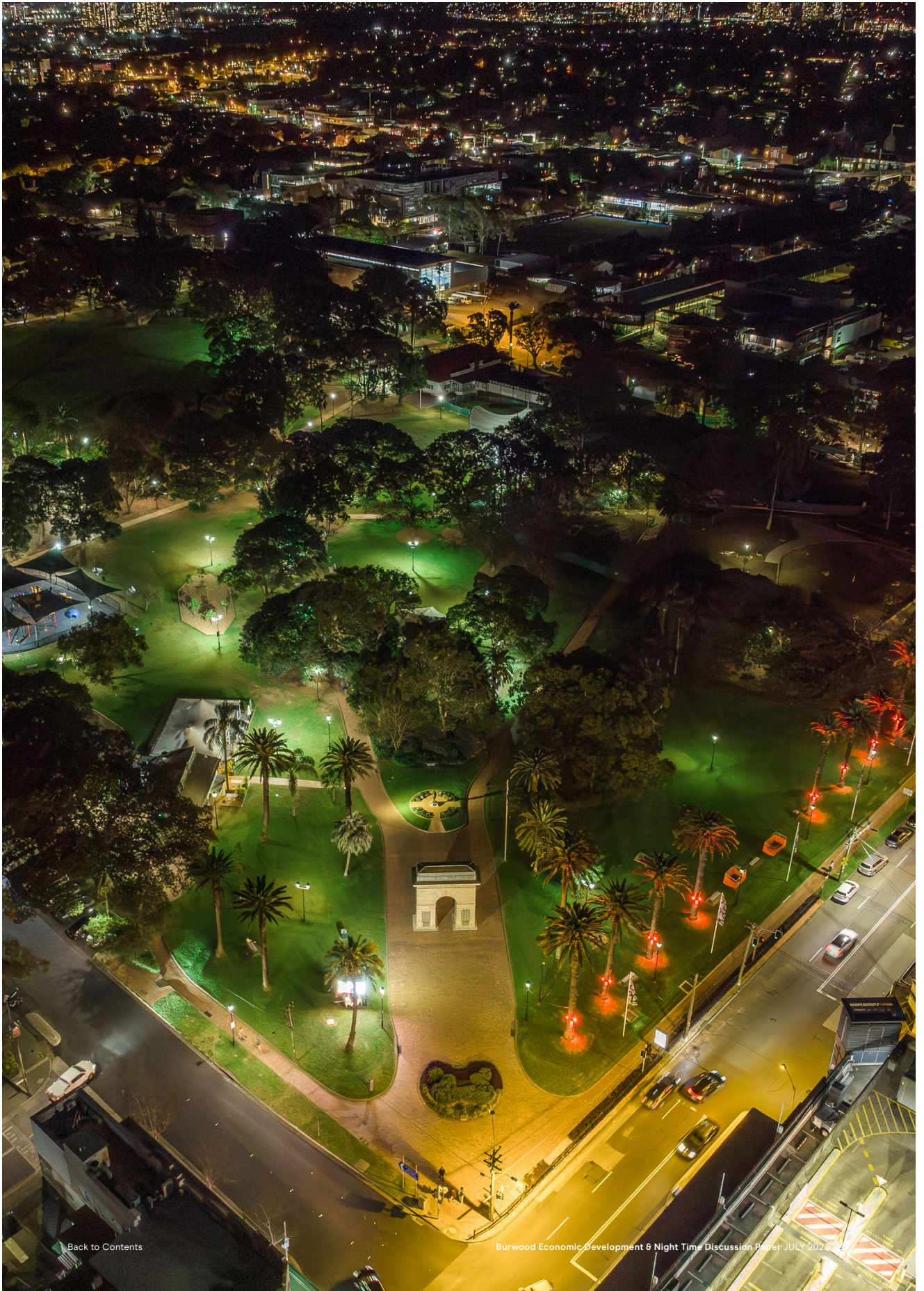


Figure 9: Incidents of Robbery at night in Burwood (Jan 2022 to Dec 2022)  
Source: BOSCAR 2022









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

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.

	<b>Quiet confidence of growing demand and diversity</b>
	<b>Opportunity to further grow the night time economy to an overall larger economic contributor</b>
	<b>Ongoing residual challenges from COVID &amp; Cost of living crisis</b>
	<b>Changing demand away from alcohol related activity but very sensitive to location</b>

### 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<sup>37</sup>. 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<sup>38</sup>.

<sup>37</sup> REMIX Summit 2022: Culture, Technology, Entrepreneurship, Sydney.  
<sup>38</sup> 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<sup>39</sup>.

**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<sup>40</sup>.



**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<sup>41</sup>.

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.

<sup>39</sup> Brickfields Consulting 2018, *Responsive Retail (The Place Report Trend #55)*, Sydney.

<sup>40</sup> Central Park Mall 2023, *Fortress Sydney*, media release.

<sup>41</sup> 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.

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.

### 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

#### Core night time economy venues

112

#### Supporting night time economy venues

52

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

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
<b>18%</b>	<b>9%</b>	<b>73%</b>
<b>30%</b>	<b>7%</b>	<b>63%</b>

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

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

### 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

#### 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.

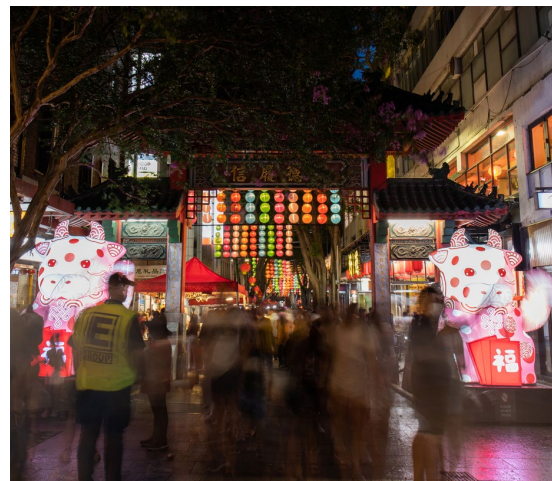






A comparative analysis of the night time economy in Burwood and five other night time economy destinations has been undertaken. The purpose is to understand the market factors, business composition and spread of activities and identify where Burwood’s strengths and opportunities lie relative to other 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
<b>Haymarket (Chinatown), Sydney</b>	182 core NTE venues Entertainment: 8% Drink activities: 23% Food activities: 69%	<ul style="list-style-type: none"> <li>Very high rent market with net face rents for retail and night time economy suitable spaces averaging around \$1,100/sqm per annum.</li> <li>The split in businesses in Haymarket reflects the evolution into a broader Asian precinct</li> <li>Noticeable mix of Thai, Japanese, Korean, and bars and cafés trading at night</li> <li>Larger ‘Drink Activity’ focus than Burwood</li> </ul>	<ul style="list-style-type: none"> <li>The average restaurant score for Haymarket is 3.98, based on google reviews with the average review number per venue of 458</li> <li>Haymarket is supported by some anchor institutions which can be important in creating a sense of place</li> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>The number of Chinese restaurants in Haymarket (50) is now similar to Burwood (41), however it is less dominant in Haymarket.</li> <li>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</li> </ul>
<b>Hurstville, Sydney</b>	103 core NTE venues Entertainment: 1% Drink activities: 7% Food activities: 92%	<ul style="list-style-type: none"> <li>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.</li> <li>The split in businesses in Hurstville is similar to Burwood in that Chinese restaurants comprise just over 40% of all NTE businesses.</li> </ul>	<ul style="list-style-type: none"> <li>The average restaurant score for Hurstville is 3.90, based on google reviews with the average review number of 280</li> <li>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.</li> <li>85% of Hurstville businesses close by 10pm on Friday nights.</li> </ul>	<ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>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.</li> </ul>

Case study	NTE Venue Count	Economic and Market Characteristics, Business Composition	Business Longevity & Review	Lessons for Burwood
<b>Degraves Street/ Flinders Street, Melbourne</b>	160 core NTE venues Entertainment: 4% Drink activities: 66% Food activities: 31%	<ul style="list-style-type: none"> <li>Degraves Street has a very high volume of 'drink activities' – many of which do cross over with food and entertainment</li> <li>Rental and capital values are far higher than Burwood.</li> <li>Larger 'Drink Activity' focus than Burwood</li> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>The average restaurant score for Degraves Street is 4.12, based on google reviews with the average review number of 609</li> <li>Criticality of anchor institutions to support a cycle of new and 'in' venues</li> <li>Overall later night profile than Burwood – the highest time period for closure is 2am when over 40% of venues have a listed closing time.</li> </ul>	<ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>Growing the late night NTE options further could be an aspirational target for Burwood.</li> </ul>
<b>Camden Town, London</b>	240 core NTE venues Entertainment: 9% Drink activities: 37% Food activities: 54%	<ul style="list-style-type: none"> <li>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</li> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>The average restaurant score for Camden is 4.11, based on google reviews with the average review number of 741</li> <li>Many of the higher reviewed anchor establishments have reviews over 4 stars</li> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>An aspirational target of 4 for average ratings should be able to be achieved.</li> <li>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.</li> <li>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.</li> </ul>
<b>Melrose/ Fairfax, Los Angeles</b>	152 core NTE venues Entertainment: 1% Drink activities: 31% Food activities: 68%	<ul style="list-style-type: none"> <li>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</li> <li>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.</li> </ul>	<ul style="list-style-type: none"> <li>The average restaurant score for Melrose is 4.29, based on google reviews with the average review number of 507</li> <li>The spread of night time activity in Melrose shows that it has an overall later night profile than Burwood</li> <li>Melrose has a very consistent night time close profile with no dominant closing slot</li> </ul>	<ul style="list-style-type: none"> <li>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.</li> </ul>



## Ta Hien Beer Street

Hanoi, Vietnam

Located in the heart of Old Quarter, Ta Hien 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.

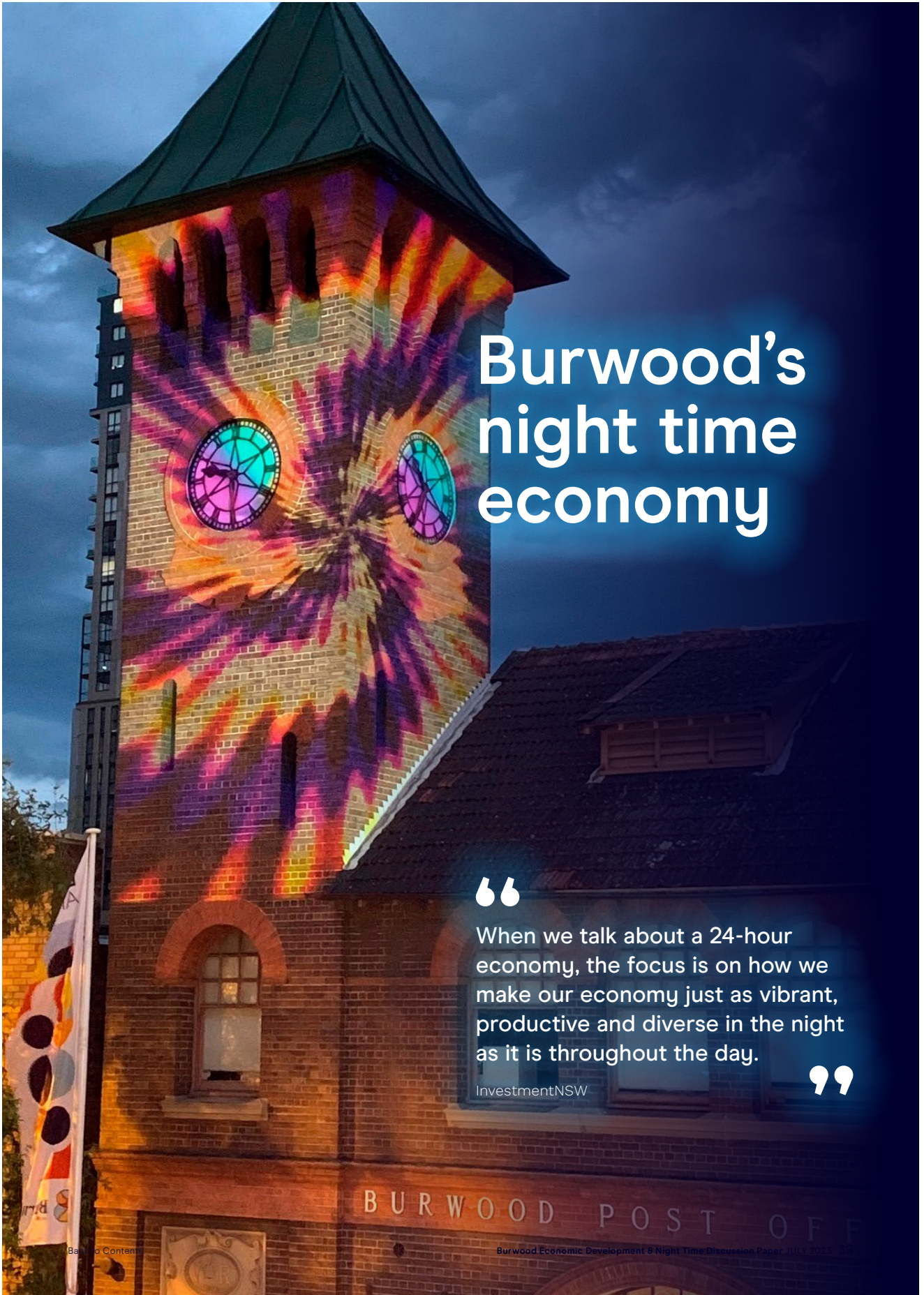
Beer Street is an international crossroad – a gathering place conducive to conversation across different cultures and generations. Ta Hien Beer Street is nearby the famous Thang Long Theatre and Hanoi Night Market – strategically located for a night-out.

*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:

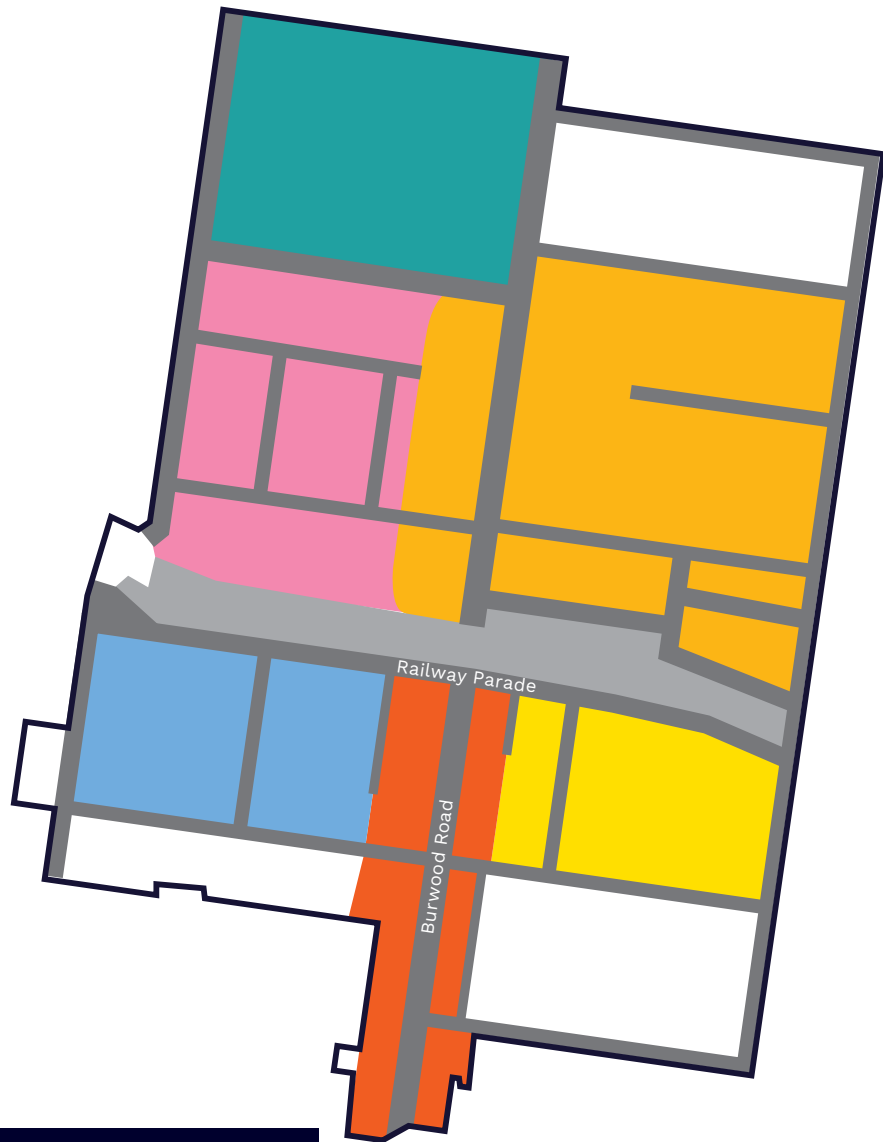
- Eat Street (Chinatown)
- Cultural Quarter
- Commercial Core
- Entertainment Central
- Education Hub
- Starry Civic Green


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.

### 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



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?

## 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.

### 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



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?





## 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?**

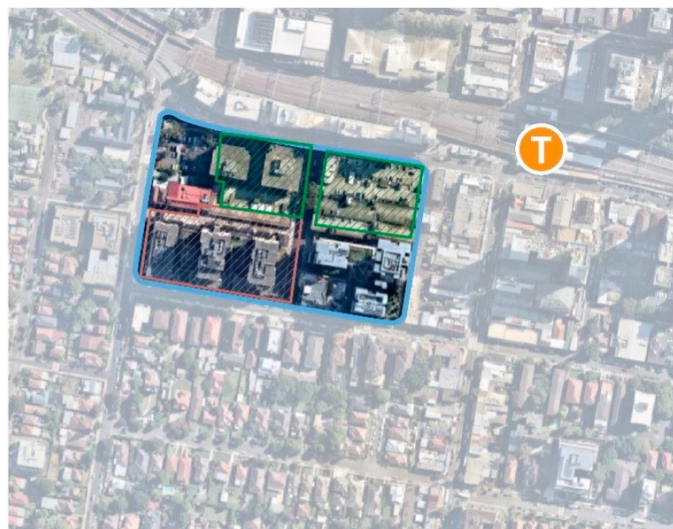
- Burwood Library
- Burwood Council Chambers
- Unity Place
- Department of Communities & Justice
- Burwood Public School



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 Guzhen 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?**

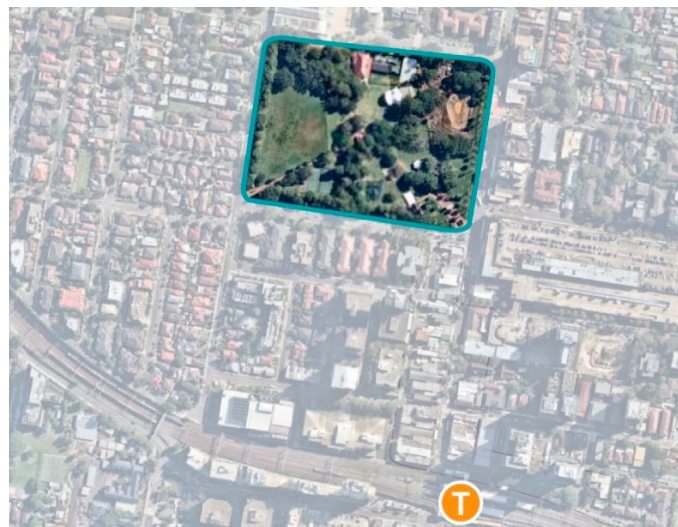
- Burwood Park Community Centre
- Burwood Park Pavilion
- The Picnic Burwood Café
- Burwood Montessori Academy Child Care



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?

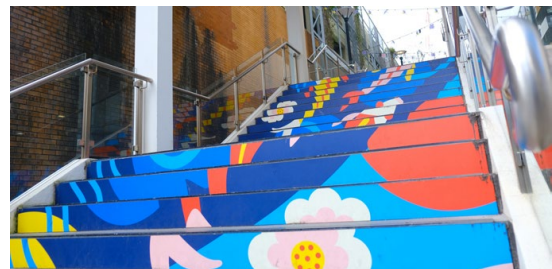






The Burwood Town Centre is undergoing an exciting and catalytic change. City-shaping projects and fine-grain interventions are transforming the experience of Burwood as a city and cultural destination. The following initiatives are driving this change.

### 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

### 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.

<sup>^</sup> Figure based on the retail floorspace figures mentioned within this report only

<sup>\*</sup> 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

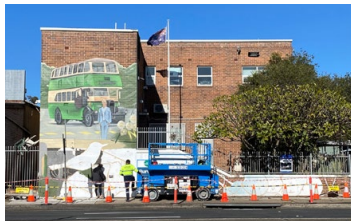
The Hornsey Lane (now, renamed as Unity Place) renewal project supported Council's strategic plan for a network of activated pedestrian laneways. The project involved large murals, landscaping, smart poles, and seating along Hornsey Lane – an iconic laneway adjacent to Burwood's Library and Community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

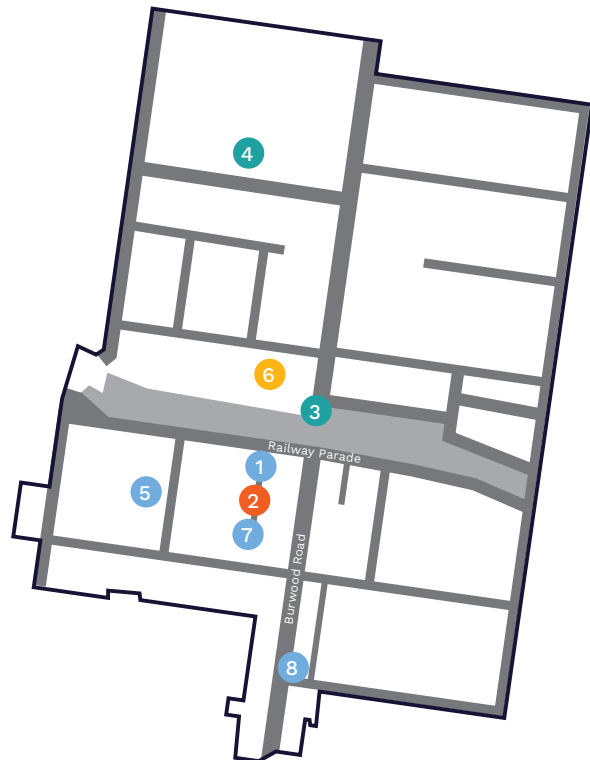


**Legend**

- 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
- + initiatives 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
<ul style="list-style-type: none"> <li>• Significant urban renewal and public investment into infrastructure, spurring significant social and economic change across the centre</li> <li>• Committed and long term public and private investment underway (Burwood North Metro Station, WestInvest Funding, Burwood Place, Club Burwood)</li> <li>• Authenticity and uniqueness of Burwood                         <ul style="list-style-type: none"> <li>– International and domestic visitors often go to The Rocks, Opera House, flagship destinations</li> <li>– Burwood as an alternative destination to the Sydney CBD</li> <li>– Corporate Sydney experience vs authentic Burwood experience – not corporate e.g. Marrickville, Newtown, Enmore</li> </ul> </li> <li>• A well-established and renowned dining and late night food scene that is growing</li> <li>• 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</li> <li>• A number of existing, under construction and approved public spaces and public domain upgrades that improves safety and amenity</li> </ul>	<ul style="list-style-type: none"> <li>• The strong reputation of the centre has not translated outside of migrant communities</li> <li>• A large portion of businesses stop trading at 10pm, making the centre feel empty after having your meal</li> <li>• There is limited economic diversity, with the bulk of the night time economy being restaurants</li> <li>• Quality of visitor experience is mixed, with footpaths, lighting, public realm varying substantially across the centre</li> <li>• Lots of temporary activation and places being created but some have struggled to transition to permanent features and solutions</li> <li>• Quality of offer is not diverse, with limited high end restaurants and retail in the centre</li> <li>• Limited quality short term accommodation</li> <li>• Limited employment opportunities</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>• Capitalise on the rapid urban renewal and change to deliver an active and vibrant night time economy</li> <li>• Develop Burwood into a true destination, and become a larger player in the Neon Grid of Sydney</li> <li>• Draw in large cultural and community events to leverage the existing restaurant and retail basis</li> <li>• 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)</li> <li>• Leverage our unique and "Authentic" identity to patron international and domestic visitors from Western Sydney Airport</li> <li>• Utilise and program of public open space for pop-up short term businesses</li> <li>• 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</li> <li>• Capture in audiences at Burwood on the way to/from CBD &amp; Parramatta</li> <li>• Ability to position to capture global connectivity/attention</li> <li>• Expand of health and knowledge services to provide a larger customer basis and address changing demands from consumers</li> <li>• Increased late night opening hours</li> </ul>	<ul style="list-style-type: none"> <li>• Rents skyrocketing - businesses going back to Sydney CBD because it's cheaper</li> <li>• Don't want to lose out on family run and small businesses</li> <li>• Lacking small independent retail – compare point of small independent retail</li> <li>• Westfield needs to be complementary to the centre</li> <li>• Limited availability and low vacancy rates driving high rents</li> <li>• Lack of 60-150m2, only vacancy around 30m2</li> <li>• Expectations of owners, want long-term tenants, which means start-ups miss out</li> <li>• Limited diversity in food and experiences offering (this is both a risk and a threat)</li> <li>• Expansion of licenced venues impacts 'family feel'</li> <li>• Absent or under-engaged landlords not investing in buildings / properties etc.</li> </ul>

# 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
<b>Land Use Table – B4 Mixed Use</b>	<p>The B4 Mixed Use zone is currently applied to all properties located within the study area of this project. It also includes the core commercial areas of the:</p> <ul style="list-style-type: none"> <li>• Burwood Town Centre;</li> <li>• Strathfield Town Centre; and,</li> <li>• Burwood North Precinct.</li> </ul> <p>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.</p> <p>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.</p>
<b>Part 6 – Additional local provisions</b>	<p>There are no current additional local provisions that directly relate to the night time economy.</p>

## Burwood Local Environmental Plan 2012

Section(s)	Observations
<b>Section 3.2 – General Building Design Controls in Centres and Corridors</b> <b>Section 3.3 – Areas Based Controls – Burwood Town Centre and Burwood Road North</b> <b>Section 3.11 – Public Domain and Amenity</b>	<p>The controls contained within the DCP are generally encouraging of street front activation and late night activities. Some minor additional considerations are listed below:</p> <ul style="list-style-type: none"> <li>• Section 3.2.3 – Council could consider specific lighting controls in high foot-traffic areas to increase visibility and safety at night</li> <li>• 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</li> </ul> <p>There are no current additional local provisions that directly relate to the night time economy.</p>



## 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
<b>Low Impact Venue Assessment</b>	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
<b>Special Entertainment Precincts</b>	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
<b>Public Domain Plans</b>	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
<b>Section 10.7 Certificates</b>	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
<b>Exempt and Complying Development (FUN SEPP)</b>	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: <ul style="list-style-type: none"> <li>Exempt development provisions for outdoor and alfresco dining on the footpath for pubs and small bars</li> <li>Complying development pathway enabling retail premises' change of use to small live music or arts venues</li> </ul>	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.

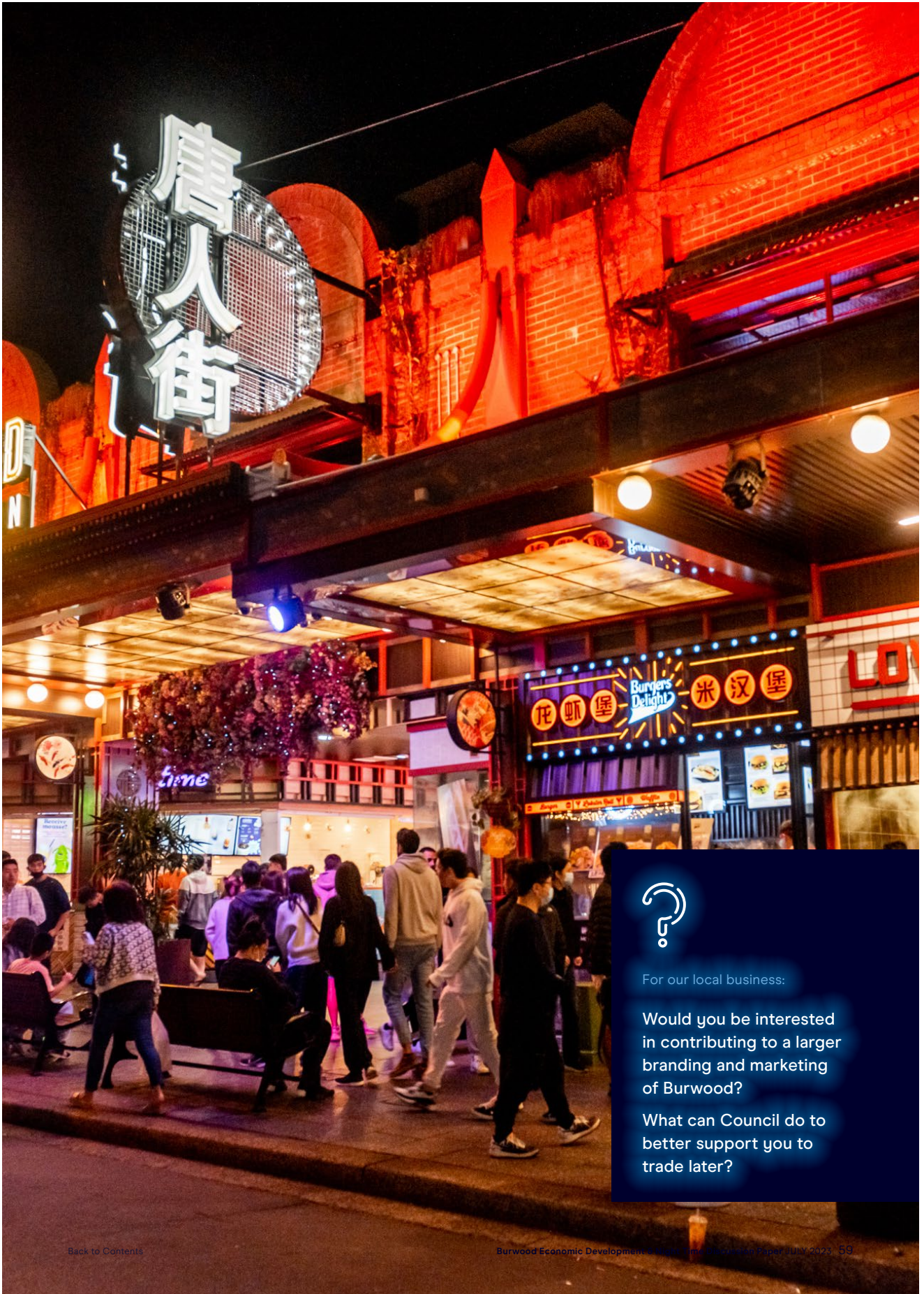


### Building on momentum

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?





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

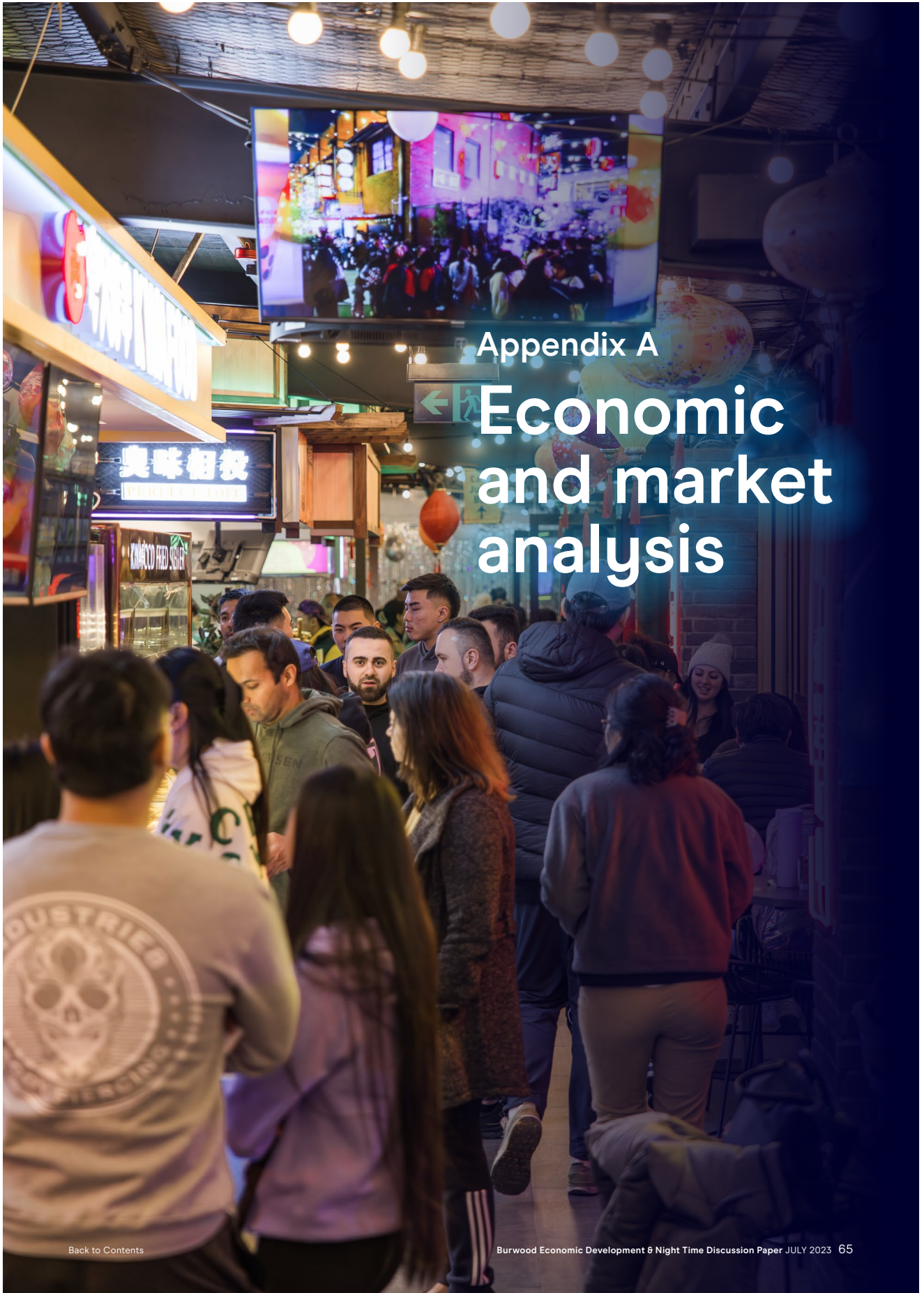
- Encourage businesses to open later strategically within their sub-precinct and cluster
- Address place-based safety concerns
- Undertake place-audits to understand key areas of concern and poor accessibility
- Encourage new local activations and events
- Encourage outdoor dining and use of the footpath 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<sup>1</sup>





	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<sup>2</sup>.

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%)<sup>3</sup>. 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

<sup>1</sup> Reserve Bank of Australia (2023) Monetary Statement – Economic Outlook May.  
<sup>2</sup> 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 night 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<sup>4</sup>.



### 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<sup>5</sup>. 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<sup>6</sup>.

<sup>3</sup> Council of Capital City Lord Mayors (2022) *Measuring the Australian Night Time Economy 2020-21*, Ingenium Research.

<sup>4</sup> KPMG (2022) *Australian Retail Outlook 2022*.

<sup>5</sup> PWC (2023) *February 2023 Global Consumer Insights Pulse Survey*.

<sup>6</sup> 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.

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<sup>7</sup>.

## 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.

### 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



#### 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
<b>18%</b>	<b>9%</b>	<b>73%</b>
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

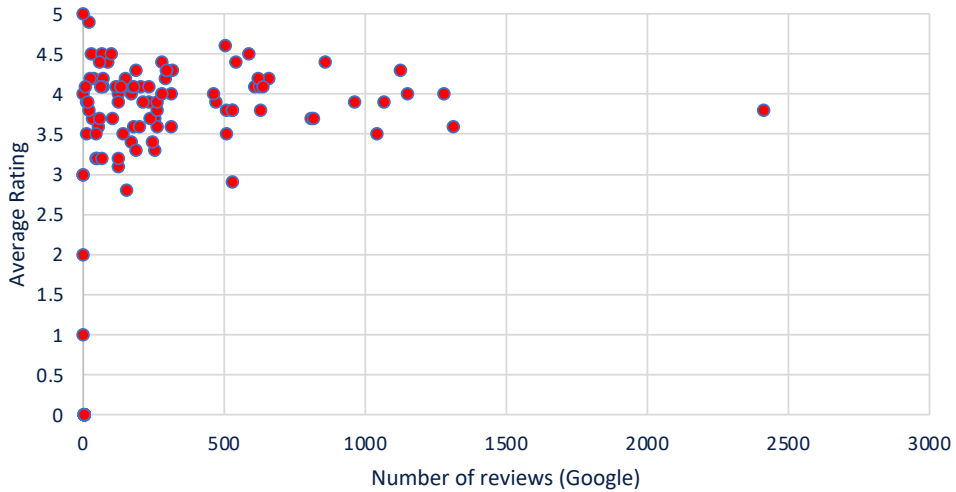
- Adult
- Amusement
- Asian Fusion
- Bar
- BBQ Restaurant
- Chinese restaurant
- Cinema
- Community
- Dance school
- Darts Bar
- Events
- Fast Food
- Halal restaurant
- Hotel and Events Venue
- Indian Restaurant
- Italian
- Italian restaurant
- Japanese restaurant
- Japanese restauranta
- Karaoke bar





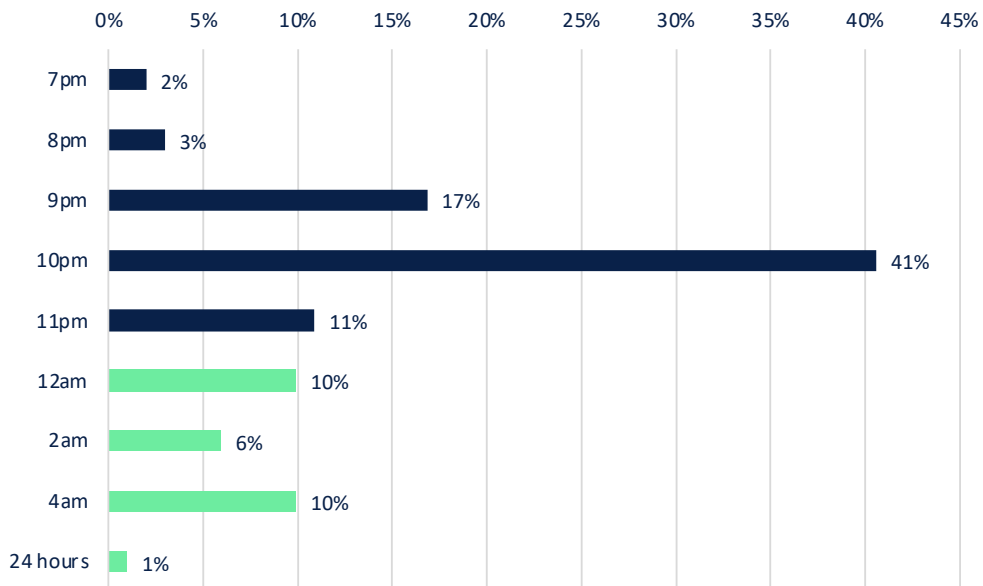
An analysis of the reviews and ratings of each Burwood NTE business has been undertaken. It shows that the average review of NTE venues in Burwood is 3.84 based on an average of 293 reviews per NTE business. There were seven venues with 1,000 reviews or more and 25 venues with over 500 reviews. Overall, 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 differences.

Rating and Review Score - Burwood



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.

Proportion of NTE by closing times



# 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
- Degraes 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.

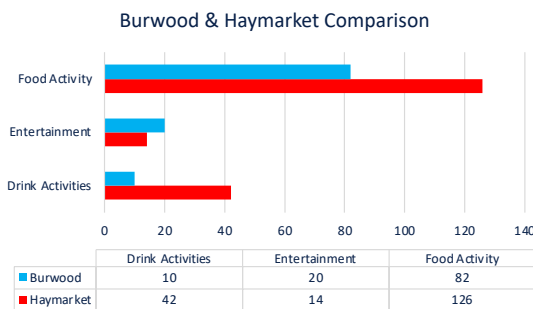
### Summary

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.



			
	14	48	126
	<b>8%</b>	<b>23%</b>	<b>69%</b>
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.

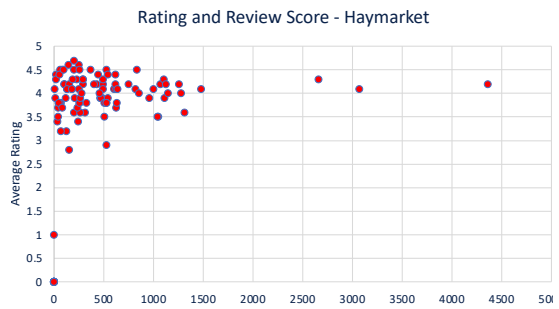


	Net Face Rents (\$/sqm)	Sale Price (\$/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~\$1,120	~\$20,588	95	5.5%
Burwood	\$684	\$14,100	29	4.8%

### 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.

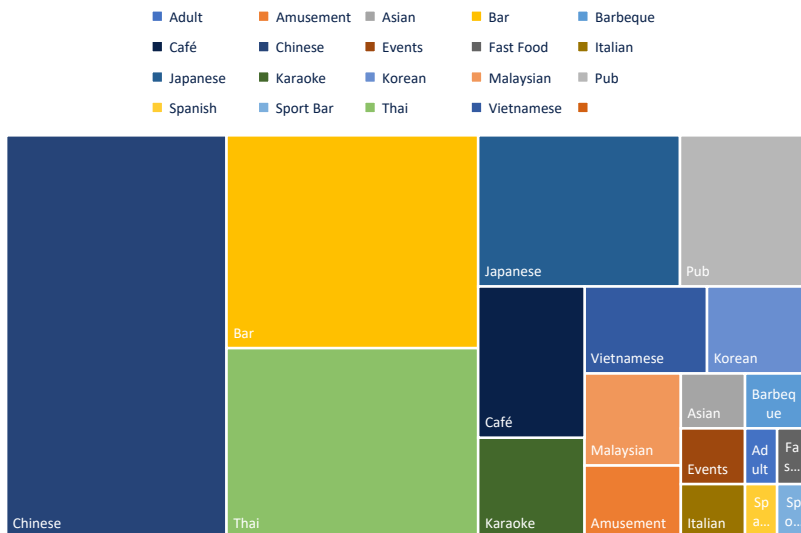
- Mamak Haymarket (Malaysian)
- Ho Jiak Haymarket (Malaysian)
- Dodee Paidang Haymarket (Thai)
- Chat Thai (Thai)
- YX Mini Hot Pot Haymarket (Chinese)



**Business composition**

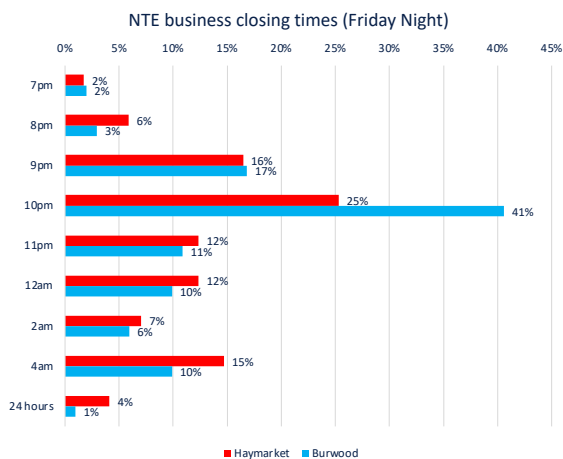
The split in businesses in Haymarket reflects the evolution into a broader Asian precinct. While Chinese restaurants are still the largest single grouping, there is a noticeable mix of Thai, Japanese, Korean as well as bars and cafés trading at night. It has a much larger ‘Drink Activity’ focus than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

Sub-category mix in Haymarket



**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.



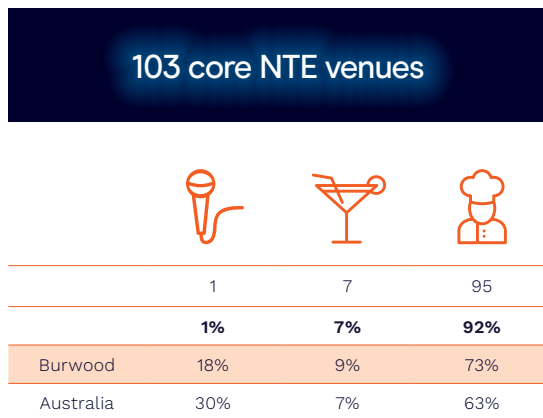
## Hurstville, Sydney

### Why Hurstville?

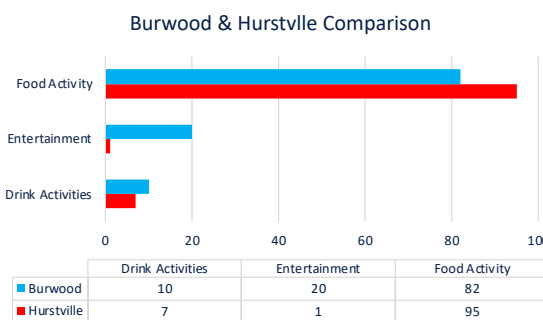
Hurstville is a major retail centre and transport interchange that shares many similar characteristics to Burwood. It has a busy railway station, a large independent dining scene, as well as a big box Westfield shopping centre within immediate proximity to the railway station. Hurstville is also known 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'.



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'.



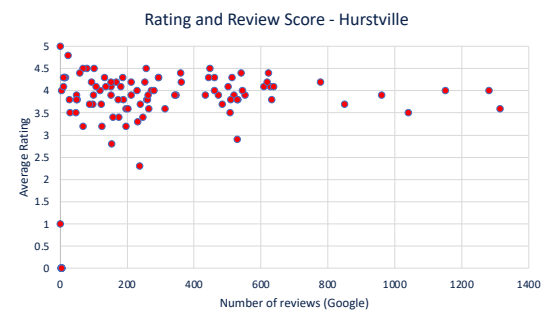
### Economic and market characteristics

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

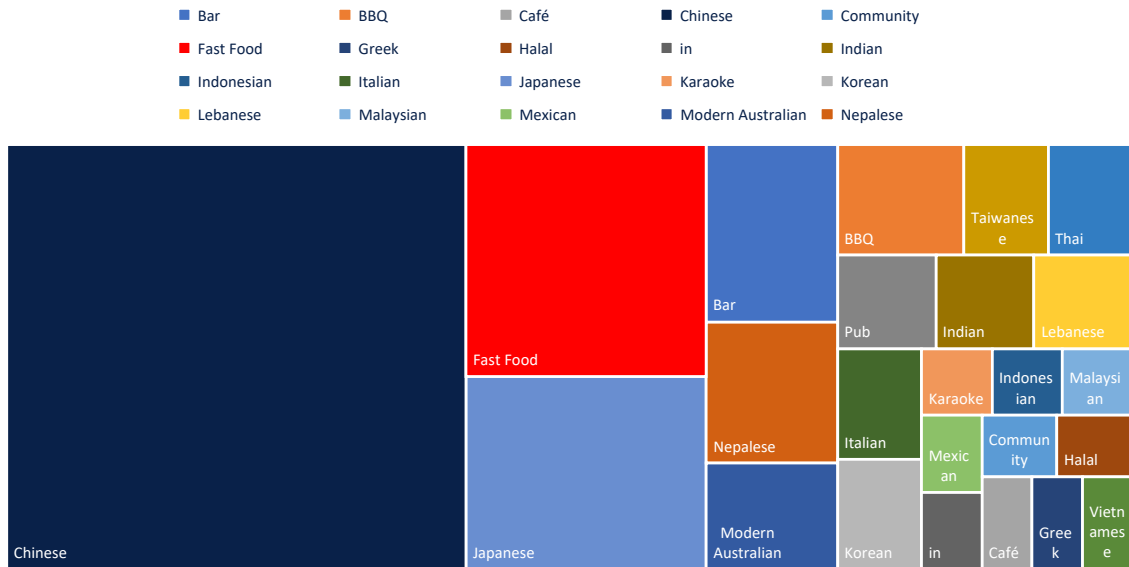
The average restaurant score for Hurstville is 3.90, based on google reviews with the average review number of 280. Again, this is very similar to Burwood. As the chart below shows however, overall in Hurstville, there are fewer venues than Burwood with over 500 reviews and a slightly lower scoring profile 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.



**Business composition**

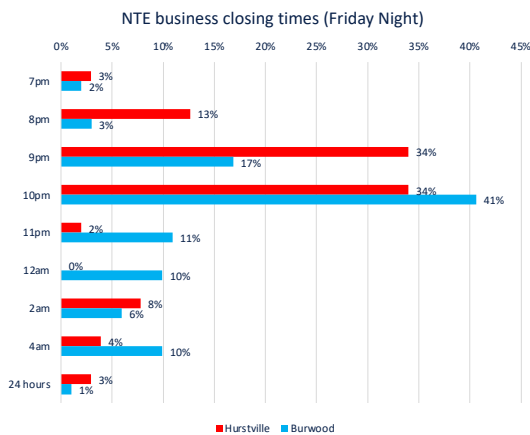
The split in businesses in Hurstville is similar to Burwood in that Chinese restaurants comprise just over 40% of all NTE businesses.

Sub-category mix in Hurstville



**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

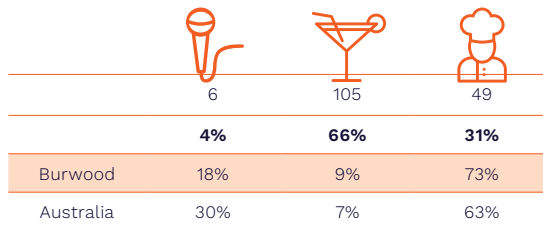
### Why Degraves Street & Flinders Lane, Melbourne?

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.

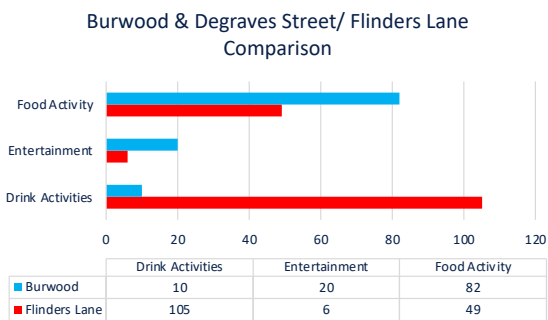
### Summary

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



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.



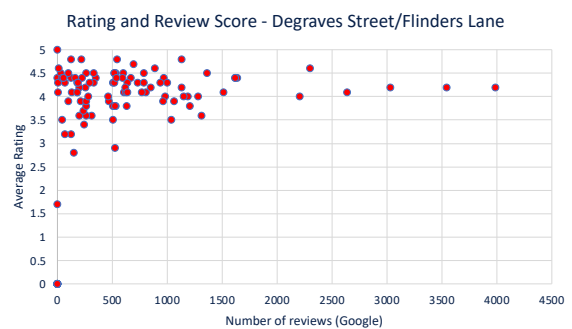
### Economic and market characteristics

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.

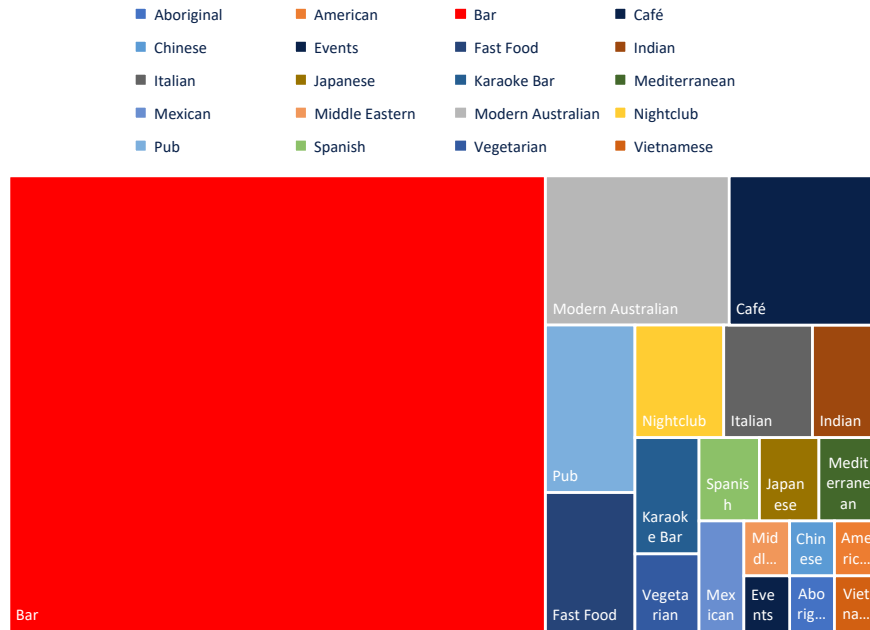




**Business composition**

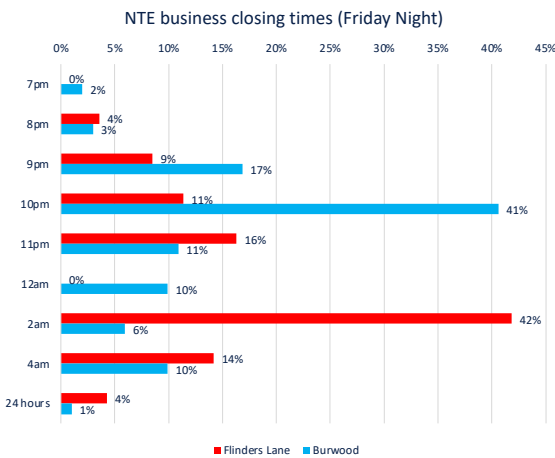
The split in businesses in Degraeves Street is markedly different from Burwood. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants.

Sub-category mix in Flinders Lane



**Night time spread**

The spread of night time activity in Degraeves 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**

- Degraeves 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.

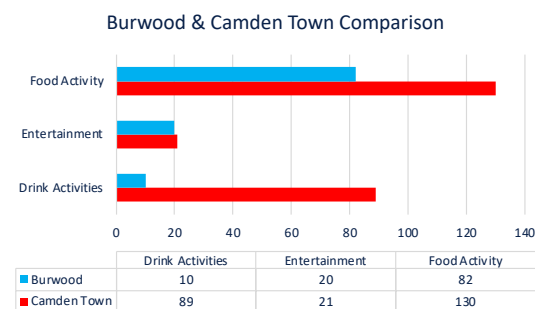
### Summary

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
	<b>9%</b>	<b>37%</b>	<b>54%</b>
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.



### Economic and market characteristics

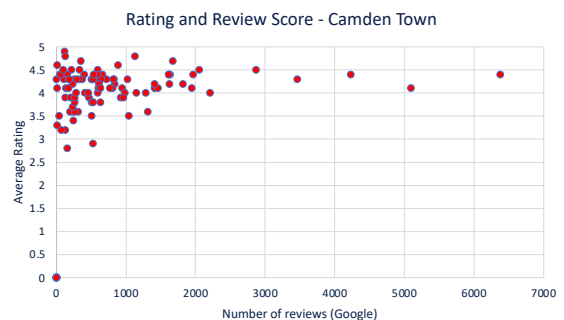
The market characteristics in Camden vary significantly from Burwood. The rental and capital costs reflect the high profile nature of the area, however the revenue ability may not actually be significantly greater on a sqm basis. The area has a very high capital transaction values which partly explains 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

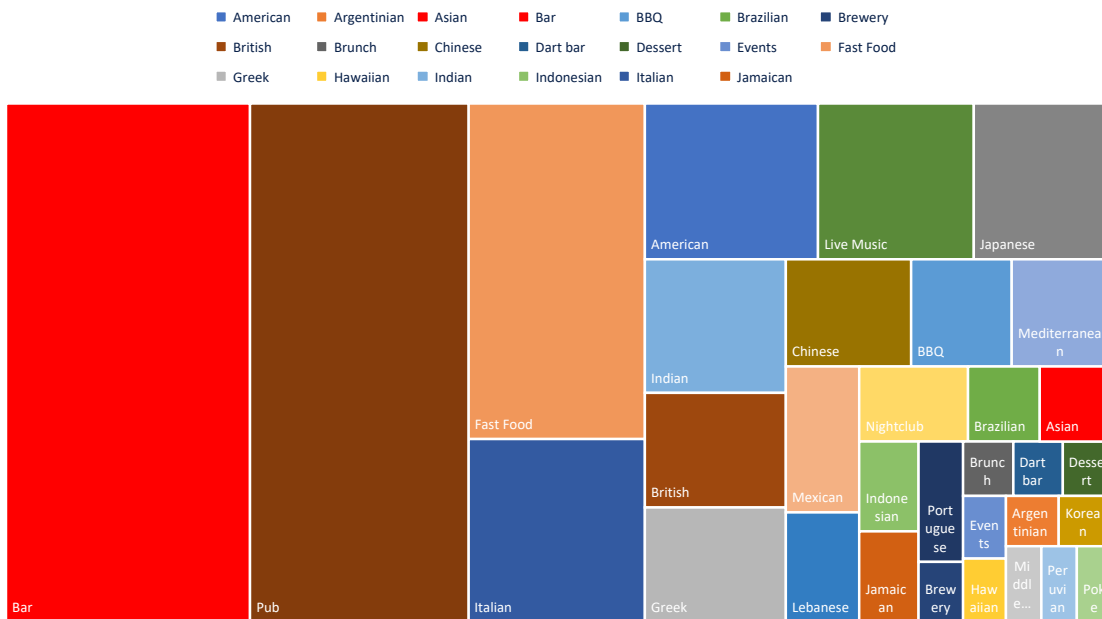
The average restaurant score for Camden is 4.11, based on google reviews with an average review number of 741. Similar to Degraes Street/Flinders Lane, the chart below shows the average number of reviews is very high with 23 venues having over 1,000 reviews and 7 venues, over 2,000 views. The chart also 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.



**Business composition**

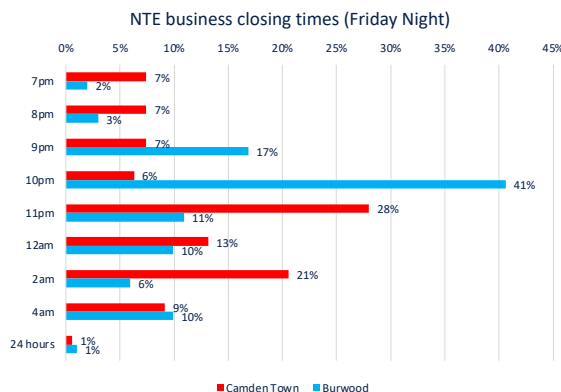
The split in businesses in Camden is markedly different from Burwood and reflects the bar, pub and alcohol-related night time environment. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants. For a Borough which is ethnically diverse (35.4% white British 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.

Sub-category mix in Camden Town (UK)



**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.

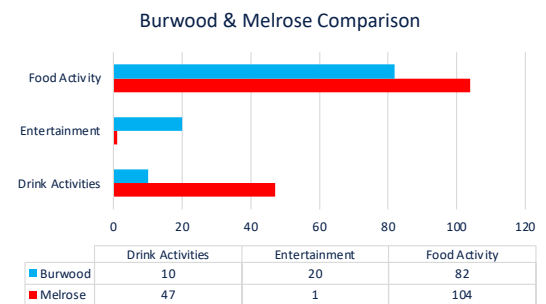
### Summary

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
	<b>1%</b>	<b>31%</b>	<b>68%</b>
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'.



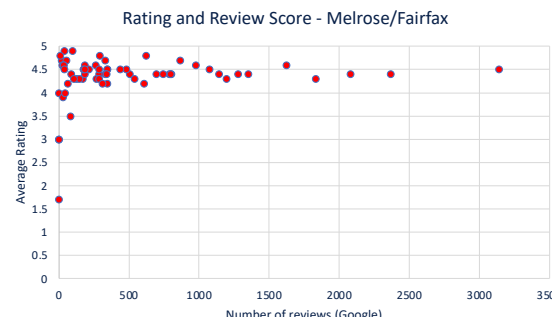
### Economic and market characteristics

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

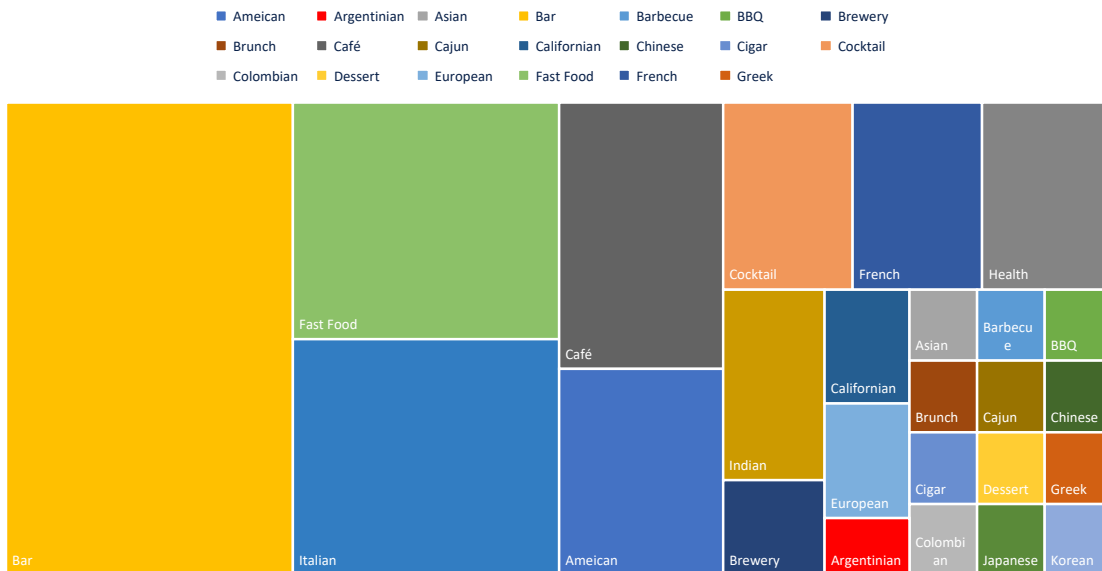
The average restaurant score for Melrose is 4.29, based on google reviews with the average review number of 507. The chart also shows a very high rating with almost all venues with over 250 ratings having an average review of 4 stars or greater. There are only 10 venues with over 1,000 reviews. The high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



**Business composition**

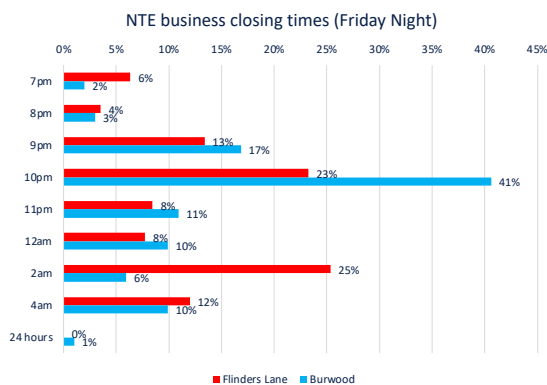
The split in businesses in Melrose is markedly different from Burwood. It shows a much higher prevalence of alcohol related establishments and much fewer Asian restaurants.

Sub-category mix in Melrose (Los Angeles)



**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.

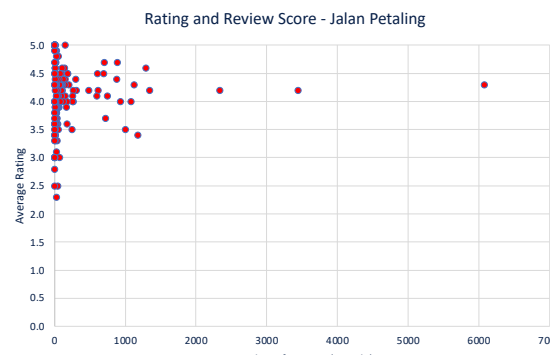
### Summary

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
	<b>30%</b>	<b>23%</b>	<b>47%</b>
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.

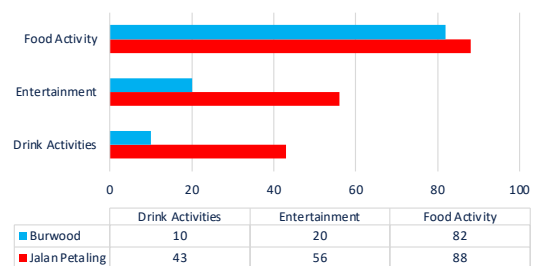


	Net Face Rents (\$/sqm)	Sale Price (\$/sqm)	Vacant Properties (Sale & Lease)	Approx Yields (%)
	~\$1,750	~\$45,000	5.2%	3.95%
Burwood	\$684	\$14,100	29	4.8%

### 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).

#### Burwood & Jalan Petaling Comparison





**Business composition**

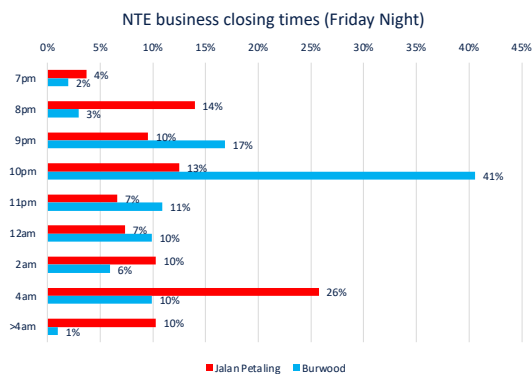
The split in businesses in Jalan Pataling reflects it’s central dining and entertainment district status. Interestingly it is night clubs which are the single largest individual category. Overall the mix of Malay Chinese, Malaysian, Chinese, Indian, South East Asian and Karaoke closely reflect Burwood.

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 Lumpur, 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.



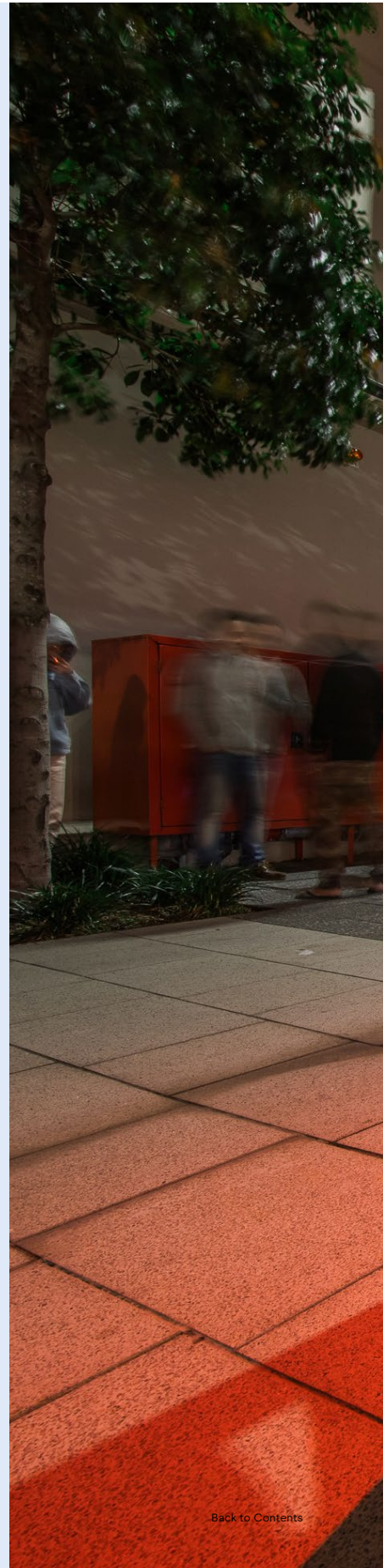
[Back to Contents](#)

**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











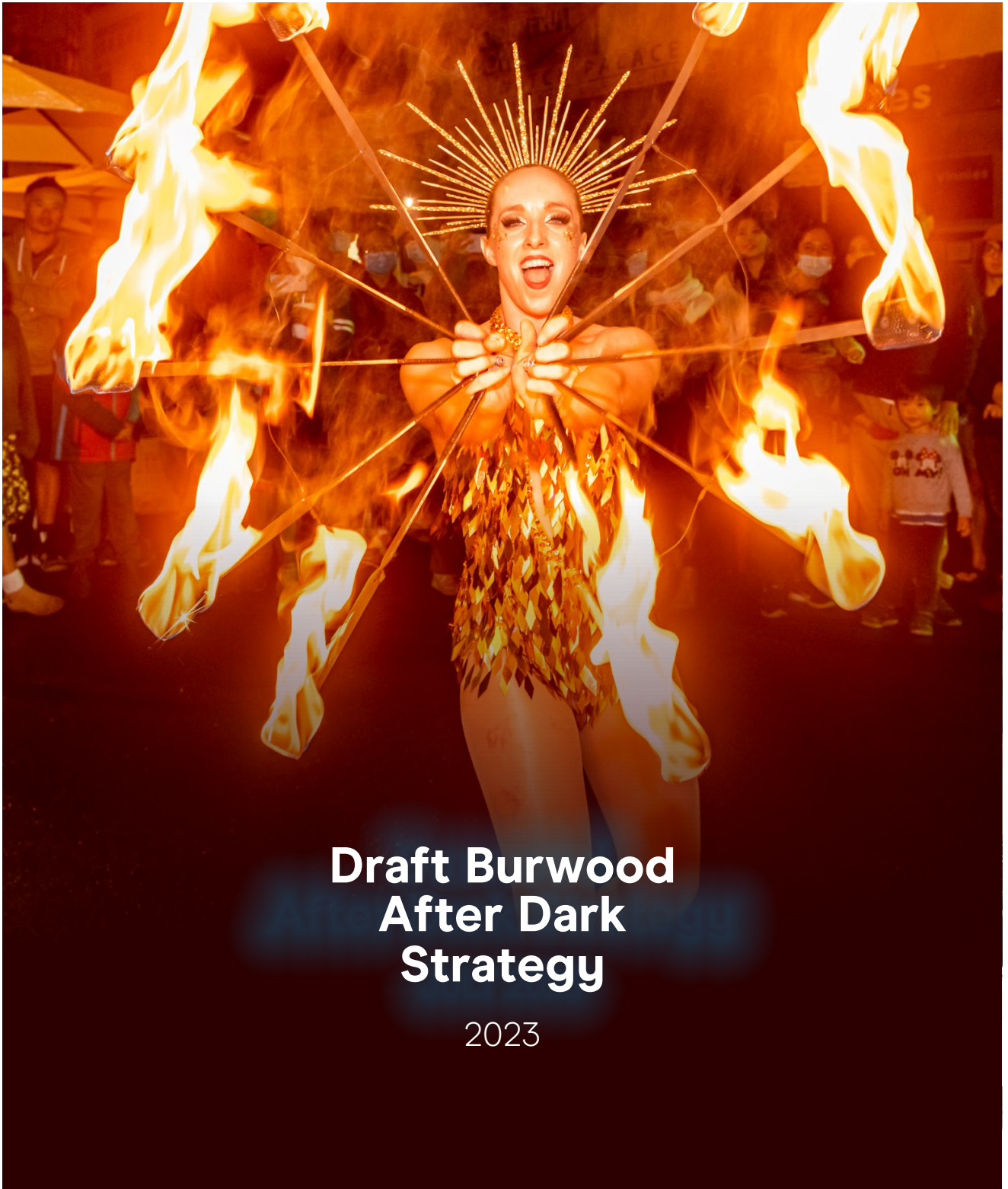
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**Burwood**  
Inc.1874



# Draft Burwood After Dark Strategy

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.



## Mayor's Message

After months of research and engagement with our residents, visitors, businesses and services, I am excited to present the Burwood After Dark Strategy to our community. This document represents a significant milestone in our journey towards creating a vibrant and thriving night time economy in our community.

The Burwood Local Government Area (LGA) has made leaps and strides in the past decade to become known as a lively, diverse and vibrant destination to rival any LGA throughout NSW. Our multiculturalism and entrepreneurship are known through Sydney, and now it is time for our night time economy to take the spotlight.

We are not starting from scratch – you only need to take a stroll through Clarendon Place, down Burwood Road, or through Unity Place after dark to be struck by the colour, entertainment and dining options on offer already. Our foundation is strong, and we have only scratched the surface of our true potential.

This Strategy is a blueprint that reflects our commitment to seizing and creating opportunities to

make our town centre more vibrant and diverse than ever, with a variety of activities and experiences that attract visitors whilst meeting local resident needs.

One of our key priorities as we move forward is safety. Burwood already enjoys a reputation as a safe, welcoming LGA, and we are dedicated to seeing this reputation extend into our expanded night time offerings.

Achieving our shared vision requires collaboration and partnership, and we will be working closely with businesses, local services, and our community to see Burwood's nightlife fulfil its enormous potential.

Thank you to all who have contributed their time and insight to this Strategy, and we look forward to delivering a dynamic night time economy with a range of exciting opportunities for all members of our community.



**Cr John Faker,**  
Mayor of Burwood



# Contents

<b>Acknowledgment of Country</b>	<b>2</b>	<b>Our Strategy</b>	<b>26</b>
<b>Mayor's Message</b>	<b>2</b>	Focus Areas	27
<b>Executive summary</b>	<b>3</b>	Focus Area 1 – Place	28
		Focus Area 2 – Connection	31
<b>Our night vision</b>	<b>4</b>	Focus Area 3 – Experience	34
Our focus areas	5	Focus Area 4 – Destination	37
What we heard	6	Implementing the Framework	40
Making it happen	9		
		<b>Our precincts after dark</b>	<b>41</b>
<b>Spotlight on Burwood</b>	<b>11</b>	Measuring our night time activity	44
What is the Night-time Economy?	11	Existing Night Time sub-precincts	47
Our Night-time Economy	12	Future Night Time sub-precincts	50
Strategic Alignment and Opportunities	13		
Who we are	14	<b>References</b>	<b>51</b>
Economic Trends	16		
Connected to Sydney and beyond	19		
Place Audit	20		
Lighting Audit	21		
Journey Mapping	22		
Drivers of Change	23		
Barriers and Challenges	25		







## Executive summary

**Burwood is expanding its after dark identity. Recent population growth, an emerging destination identity, and transformative urban projects are pushing our night time economy (NTE) to the next level. A bold vision for Burwood's night-time economy is in order to help our area transition. This After Dark Strategy heralds that change.**

The Burwood After Dark Strategy (the strategy) sets a long-term vision and a cohesive 10-year roadmap for Burwood's night-time economy. Focused on Burwood (referring to Burwood Town Centre and Burwood North area), this Strategy will make the area a more vibrant place with a diverse range of cultural activities, events and entertainment after dark.

Burwood is well-placed between the two CBDs of Sydney and Parramatta, allowing it to not only embrace, but champion the opportunities presented by the night-time economy. With investment into new infrastructure and a significant amount of urban renewal underway, now is the time to ensure our renowned offering continues to grow and expand for generations to come.

This strategy has been informed by the preparation of the Burwood Economic Development and Night Time Discussion Paper, and a thorough round of community consultation with our local residents, key private and government stakeholders, and local champions. The implementation of a vibrant, diverse and safe night-time economy in Burwood is contingent on a successful After Dark Strategy. This Strategy explores how this vision can be achieved through four focus areas – Place, Connection, Experience and Destination.





# Our night vision

In 2033, the Burwood Town Centre is a captivating and welcoming destination after dark. Burwood is a thriving metropolitan experience, renowned with an authentic and polished night-time experience centred around progressive ideas.

Burwood is at a crossroads of change, with city-shaping projects unfolding to support a growing population. Burwoods established retail and dining scene is illuminated with complementary cultural and creative activities.

Renowned as a cross-cultural late-night **destination**, Burwood attracts visitors from across Greater Sydney and corners of the globe. Burwood is well-**connected** to established and emerging centres of Sydney, Parramatta, and Sydney Olympic Park, enriched by new world-class transport infrastructure. Burwood offers diverse **experiences**, from food and gaming to live family-friendly entertainment. Burwoods urban fabric is a vibrant, safe and welcoming **place** that meets the needs of both locals and visitors by night.





## Authentic and unforgettable, the night pulse of Burwood is like no other.



# Our focus areas

The Burwood After Dark Strategy is supported by four pillars that achieve our exciting vision for Burwood

These focus areas have been shaped through community consultation and research on different aspects of the night time economy and its management. Beginning with 'Place' (i.e. Burwood's current state of the night), these focus areas build towards positioning Burwood as a 'Destination' (i.e. Burwood's future late-night potential).

Pillar	Justification	Description	Focus
 <p><b>Place</b></p>	<p>The physical place-based components such as streets, spaces and buildings that support everyday life.</p>	<p>Burwood's night-time economy is anchored by the foundations of a <b>great place that is safe, vibrant, and diverse.</b></p>	<p><b>Physical Infrastructure and Placemaking</b></p> <ul style="list-style-type: none"> <li>• Safety and community experience</li> <li>• Placemaking and integrated planning</li> <li>• Public spaces</li> <li>• Amenities</li> <li>• Capacity building</li> </ul>
 <p><b>Connection</b></p>		<p>Burwood's night-time economy is strengthened by <b>well-connected transport and infrastructure.</b></p>	<p><b>Transport and Infrastructure</b></p> <ul style="list-style-type: none"> <li>• Public transport</li> <li>• Road infrastructure</li> <li>• Geographic advantage</li> <li>• Movement and Place</li> </ul>
 <p><b>Experience</b></p>	<p>The destination-based components that support the quality of visitor experience.</p>	<p>Burwood's night-time economy is revitalised by a <b>diverse range of experiences.</b></p>	<p><b>Businesses and Restaurants</b></p> <ul style="list-style-type: none"> <li>• Retail and dining hospitality</li> <li>• Business diversification</li> <li>• Tailored experiences</li> <li>• Creative and cultural spaces</li> </ul>
 <p><b>Destination</b></p>		<p>Burwood's night-time economy is recognised as a <b>destination with local and visitor appeal.</b></p>	<p><b>Marketing and Promotion</b></p> <ul style="list-style-type: none"> <li>• Complementary assets</li> <li>• Place branding and marketing</li> <li>• Domestic and international appeal</li> </ul>

## What our community values

The Burwood Community Strategic Plan, Burwood2036, identifies key principles to guide Council's decision making processes:

1. Sustainability now and for the future
2. Bound by social justice – equity, access



# What we heard

As part of the Strategy, over 400 participants and 40 businesses were engaged in meaningful conversations about Burwood’s late-night potential.

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 everyone, Burwood Council has undertaken a thorough round of community consultation. This includes:



Online Survey



2 x Business Door Knocks through Burwood Town Centre



Online Ideas Wall



3 x Late Night Pop-ups between 6pm to 8pm



Social Media Posts



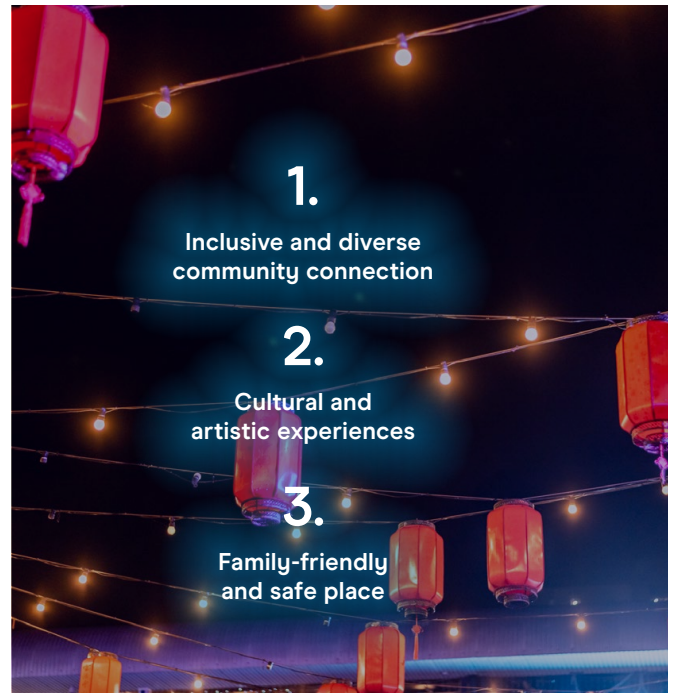
2 x Late Night Intercept Surveys



A workshop with existing businesses



Multiple meetings with key local and external stakeholders



1.

Inclusive and diverse community connection

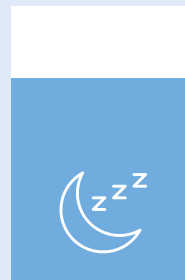
2.

Cultural and artistic experiences

3.

Family-friendly and safe place

## What are our priorities?



74%

of people surveyed said they **currently go home** by 9pm.



54%

of people surveyed said they **wanted to stay out** till at least midnight.



This represents a three hour gap between when people currently go home, and when they’d like to stay out



**Staying out late**



**Our community currently go home by 9pm, but there is a strong appetite to stay out** 74% of participants currently stay out in Burwood until 6pm – 9pm. However, 54% of participants expressed they would like to stay out until 11pm and onwards.

**Trading late**



**Businesses in Burwood felt they closed too early and are willing to extend trading hours.** Based on a typical Friday evening, 67% of surveyed businesses trade until 10pm, with a number of businesses closing by 7pm. All surveyed businesses expressed interest in extending business hours – evenly spread across 9pm, 10pm, 12am, 1am, 2am, and 3am or later.

**Barriers**



**Burwood’s biggest night time barriers for visitors and community members are associated with diversity of offering, late-night trading, parking and awareness.** When prioritising what prevented them from staying out, 51% of participants nominated “there’s not enough to see and do/I’d like more diversity of things on offer”, 42% thought “nothing is open late enough”, 22% said “it’s hard to get a parking space”, and 22% also expressed “I don’t know what’s on.”

**Expenditure**



**Burwood’s night-time patrons currently spend less – though are willing to spend more.** Based on a typical per person night-time spend, 35% of community participants budget \$20-\$49 for a night-out, 28% spend \$50-\$99, and 20% spend \$19 or less. When compared to potential spending habits, participants were willing to spend more – 35% are willing to spend \$20-\$49, 30% are willing to spend \$50-\$99, and 28% are willing to spend \$100-\$199.

**Opportunities**



**Burwood’s night-time opportunities are manifold and point to diversification beyond food activities to cultural, creative and recreational uses.** When asked to rank priorities for business programming, 83% of business survey respondents prioritised “outdoor recreation/gaming activities”, 67% nominated “outdoor art activities” and 67% selected “food activities.”



**51%**

Say there’s **not enough to see or do** and nothing is open.



**60%**

Of people surveyd said they’d **stay out later if there were more creative entertainment.**



**50%**

Of people surveyed were **willing to spend more than they currently do on a night out.**

50% of people who spend \$20-49 were willing to spend over \$50-99. 53% of people who spend \$50-99 are willing to spend over \$100-199.





# Making it happen



This Strategy builds on a strong foundation of existing Council strategies, alongside detailed desktop research and community consultation as part of this project. This Strategy is complemented by an Economic Development Discussion Paper and Visitation and Future Investment Prospectus, providing a holistic 'state of the night' of Burwood after dark. Combined, this suite of documents provides a roadmap to position Burwood as a more attractive night-time destination to entice new visitors while meeting local resident needs.



### Economic Development Discussion Paper

Provides a comprehensive overview of Burwood's existing night-time economy and destination values, testing an economic development vision and roadmap underpinned by community aspirations.



### Burwood After Dark Strategy (this document!)

Provides the direction and an implementation plan to deliver a dynamic night-time economy that includes cultural, hospitality and entertainment opportunities, which meet the needs of residents, visitors and business.



### Visitation and Future Investment Prospectus

Highlights the key attributes and features of our area that make Burwood a dynamic destination for business, entertainment and recreation

## Strategic alignment

This Strategy sits within a broader strategic context and considers the input of the following local and state government policies and frameworks:

Burwood Council	NSW Government
<ul style="list-style-type: none"> <li>Burwood 2036: Community Strategic Plan (CSP)</li> <li>Burwood Local Strategic Planning Statement (LSPS)</li> <li>Research into Local Employment and Investment in Burwood</li> <li>Burwood Place Management Framework (in development)</li> </ul>	<ul style="list-style-type: none"> <li>Greater Sydney 24-hour Economy Strategy</li> <li>Future Transport Strategy</li> <li>NSW Visitor Economy Strategy 2030</li> </ul>

## Drivers of change

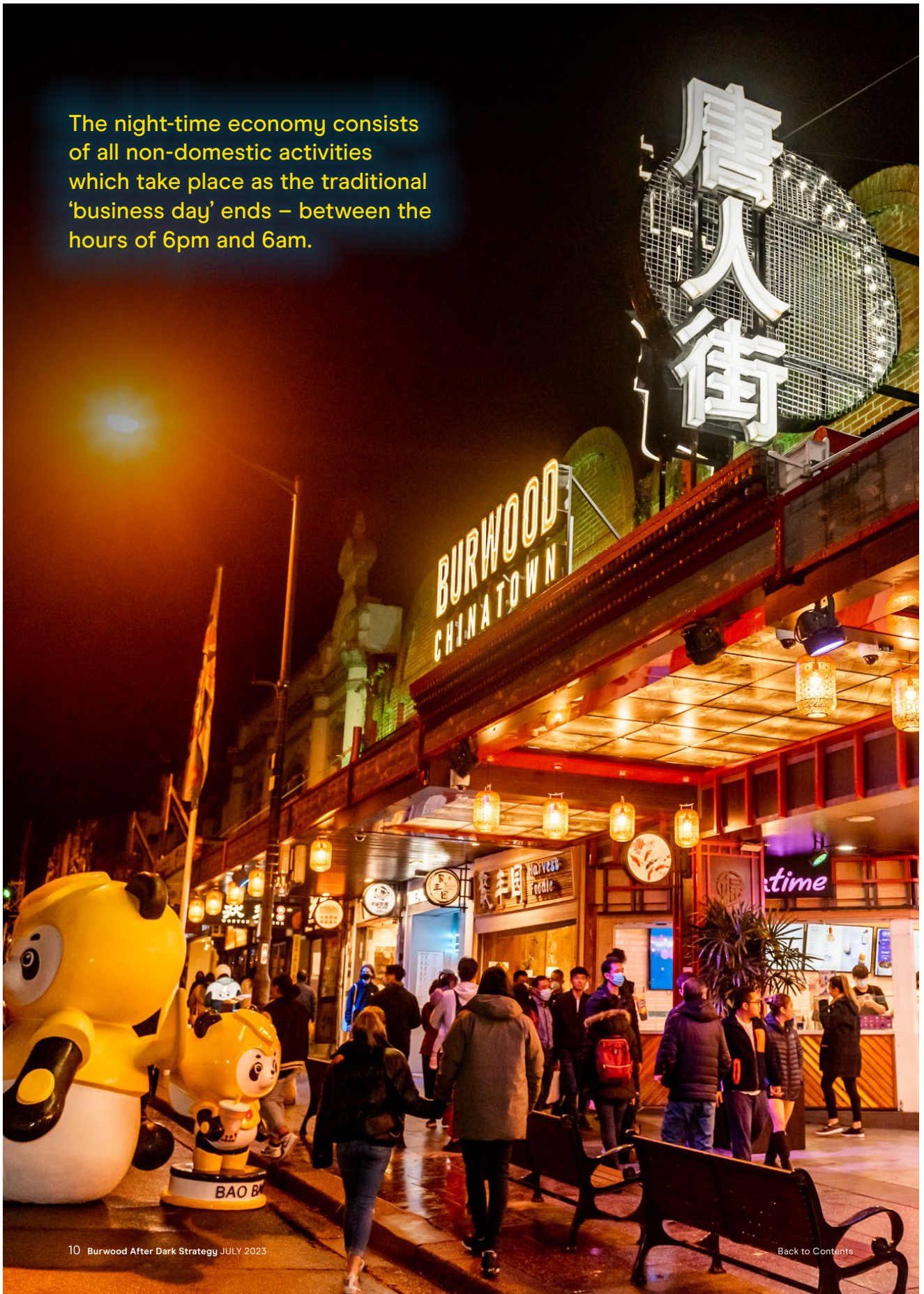
This Strategy considers and responds to several driving forces shaping the experience of Burwood at night, including:

- High population growth
- Retail floorspace demand
- Urban renewal
- Destination qualities
- Public transport
- Local focus
- Social and demographic changes

These drivers of change are described in further detail in page 23 of this Strategy, with research provided in the Economic Development Discussion Paper.



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.







# Spotlight on Burwood

## What is the Night-time Economy?

In an urban environment, night-time activities form a distinct environment to the day-time equivalent, organised within three distinct periods of time. Each phase has unique dynamics and community needs:

- Evening 6pm to 9pm
- Night-time 9pm to 2am
- Late night 2am to 6am

The first conceptualisation of the night-time economy in planning and urban governance appeared in Britain in the early 1990s<sup>2</sup>. 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, connection, experience and destination, meaning no two night-time economies will be the same<sup>3</sup>.

The night-time economy is diverse and vibrant, comprising a range of industries and activities. As identified in the Sydney 24-Hour Economy Strategy, these are classified as:

- Core night-time businesses
  - Entertainment (e.g. clubs, sports, galleries, and performing arts)
  - Food (e.g. cafes 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)\*

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

<sup>1</sup> Sydney 24-Hour Economy Strategy, Investment NSW, 2020

<sup>2</sup> Night Time Economy Strategy, City of Ryde, 2016

<sup>3</sup> Sydney Night Time Economy: Cost Benefit Analysis – A Report for the City of Sydney Council, Bevan & Turnham, 2011



# Our Night-time Economy

## Our Night Time Economy

Burwood is an established retail and dining destination within Greater Sydney. Burwood is currently home to vibrant late-night activity that reflects an equally vibrant international community. Significant regional drawcards such as Burwood Chinatown, Burwood Westfield and Emerald Square attract locals and visitors alike and drive traffic into the evening.

Burwood's current state of the night can be summarised in the following points of difference:

- ✔ Burwood has a **major contribution of Chinese restaurants** – 36% of total NTE businesses
- ✔ Burwood has a **mixed NTE business contribution** of bar, restaurant, karaoke and community use establishments
- ✔ Burwood has a **high average-rating of NTE venues** – 3.84 based on an average of 293 reviews
- ✔ Burwood has a **high proportion of newly established venues** which compete directly with long-standing venues across Greater Sydney
- ✔ Burwood has a **majority of early night-time establishments** – 27% of total venues shut from 12am

These strengths position Burwood as an attractive destination after dark characterised by authentic, diverse and high-quality offerings.

However, there are several barriers that have limited Burwood's night-time prosperity to date. These barriers are described in further detail on page 25 of this Strategy and in the *Burwood Economic Development Discussion Paper* (which supports this After Dark Strategy).

- ✘ **Activity drop-offs** – Burwood has a noticeable decline of business activity and pedestrian movement after 10pm.
- ✘ **Limited economic diversity** – Burwood has limited diversity in culinary and activity offerings.
- ✘ **Lack of creative and cultural drawcards** – Burwood does not have a central cultural or entertainment drawcard.
- ✘ **Marketing and branding** – Burwood is not strongly marketed as a night time destination to wider communities within Greater Sydney.
- ✘ **Place-based challenges** – related to lighting, safety and transport connectivity.
- ✘ **Limited 'spill-out' spaces** – Burwood Town Centre has limited public open space and outdoor store trading for people to utilise during or after a meal, limiting their ability to stay in the centre for long periods of time.

Importantly, these barriers within the NTE context present corresponding opportunities to unlock the night-time potential of Burwood as a local, regional and international destination. Relevant opportunities for Burwood after dark have been identified in various strategic documents, outlined on the following page.



I don't cook at home anymore. There's so many options (in Burwood) for food I just get takeaway!

Pop-up participant



When it comes to food, Burwood has everything

Pop-up participant





# Strategic Alignment and Opportunities

The following key takeaways relate to the key strategic documents related to this strategy. Further detail of the content of each document is provided in the supporting Discussion Paper.

## Burwood 2036: Community Strategic Plan (CSP)

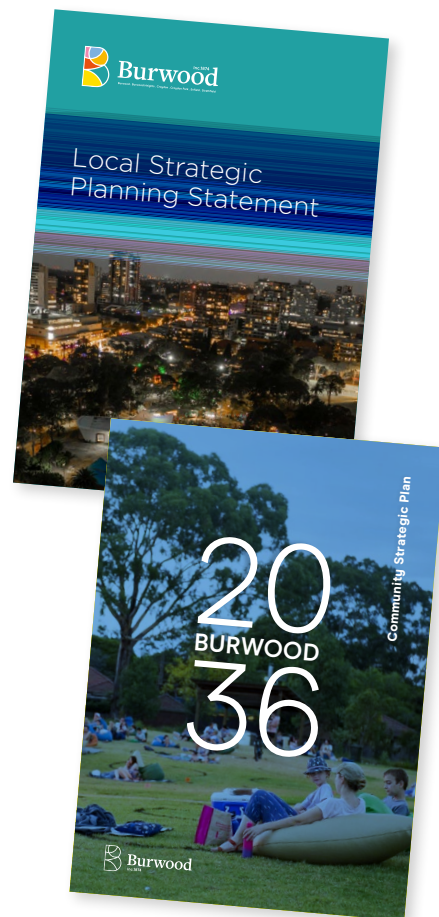
- The Burwood community desires public places that are safe and activated by day and night
- Transport and accessibility is a top value of the community, and similarly, traffic and transport is a key area residents would like to see improvement

## 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 offer
- 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



# Who we are

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.

## Finances

\$1,867 Household income  
 \$500 Median weekly rent  
 \$2,500 Media 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

ECONOMICS

**\$2.83b** Gross Regional Product (2021)

**15.5%** Live and work in the area (2016)

**37.8%** University qualification (Bachelor Degree or higher)



People  
**40,397**

Median age  
**34 years**

Population density  
 5,651 people per km<sup>2</sup>

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%

PEOPLE

**62.9%** Language other than English used 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 the majority (65.7%) living in medium to high density houses. Burwood's population is projected to grow by 17,781 (44%) 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%). Migration in and out of Burwood is primarily from nearby LGAs of Bayside, Parramatta, Liverpool, and Cumberland.

Housing

Private dwellings	<b>16,168</b>	Families	<b>14,817</b>	
Dwelling type of dwellings	<b>65.7%</b>	are medium to high density		
<b>Tenure type %</b>				
25.4%	Fully Owned	27.4% Couples with children		
21.6%	Mortgage	24% Couples without children		
45.4%	Renting	9.4% One parent families		
<b>Vehicle ownership %</b>				
22.5%	No vehicle	22.7% 1 person		
41%	1 vehicle	31.4% 2 persons		
21.6%	2 vehicles	19.7% 3 persons		
8.9%	3 or more vehicles	16% 4 persons		
		6.2% 5 persons		
		3.9% 6 or more persons		

People

### Burwood Population Forecast

<b>Local in migration</b>			<b>Local out migration</b>	
35,243	Bayside		37,596	Bayside
16,308	Cumberland		22,261	Parramatta
14,079	Parramatta		20,737	Liverpool
11,371	Liverpool		17,529	Cumberland

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





# Economic Trends

In developing this strategy, a number of economic and retail conditions have been analysed and observed. These will impact how our competitive strengths can be leveraged.



## Macroeconomic conditions:

- Short-term challenges of economic uncertainty within the next 12-24 months, before an expected pick-up in consumer confidence from 2025
- Night-time spending is more discretionary than day-time spending so providing an attractive experience will be critical to support the night-time economy
- Household spending is split as there has been strong wage growth and additional savings, offset by higher interest rates and inflationary pressure



## Broader night-time economy conditions:

- Burwood Burwood has an existing but limited night time economy, with a smaller proportion of night-time activity and smaller proportion of drink-related activities than other night-time areas in Sydney
- The majority of Australia's core night-time economy establishments belong to the food sector (63%), followed by entertainment (30%) and drink (7%)



## Market conditions:

- Burwood's market is strong, agile, and well-positioned for future growth
- The property market in Burwood is characterised by relatively low long term vacancy, steady transactions and rents that reflect the strong retail turnover densities and demand



## Retail trends:

- **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.
- **Crafting immersive retail experience:** 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 destination appeal as customers continue to seek the memorable over the material.
- **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<sup>4</sup>.



## Statistical analysis:

- Burwood has 112 core NTE venues and 52 supporting NTE venues
- Burwood has a unique mix of night-time activities, with venues classified as 62% food activities, 30% entertainment, and 7% drink activities.
- A growing proportion of new high-rating venues are out-performing more established venues
- The majority of NTE venues in Burwood close by 10pm, however over 27% shut at midnight or after.

<sup>4</sup> Brickfields Consulting, *Responsive Retail (The Place Report Trend #55)*, 2018.





**We can create more jobs if we support the night time economy**

As of 2021, the Burwood LGA had a total of 17,649 employed local residents persons. Analysing our resident workforce, nearly 40% of employed persons directly or indirectly intersect with the night time economy (see figure below).

Despite the night number of residents directly or indirectly employed within the night time economy, 81% of the resident workforce are employed outside the LGA. Accordingly, encouraging expansion of the night time economy would likely increase the self-containment of jobs in the LGA.

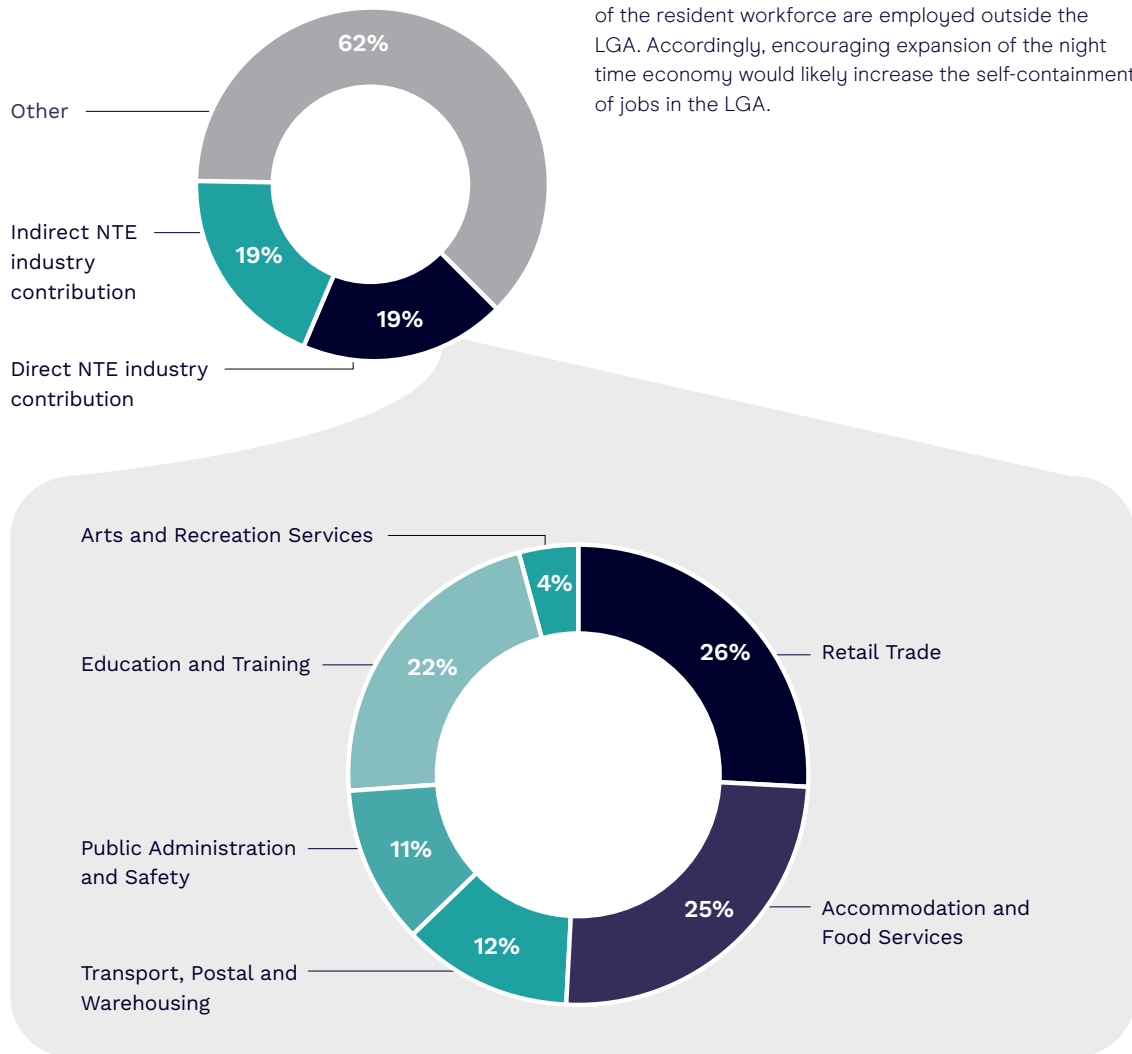


Figure 2: Employed Residents in the Burwood LGA  
 Source: Australian Bureau of Statistics, 2021



# Connected to Sydney and beyond

Burwood is strategically located within the inner west of Sydney, only a 15min train ride to Parramatta and the Sydney CBD.

Burwood has great north-south permeability and is well-served 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 – such as Sydney Metro Burwood North Station and WestConnex – Burwood can be positioned as a well-known and accessible night-time destination.

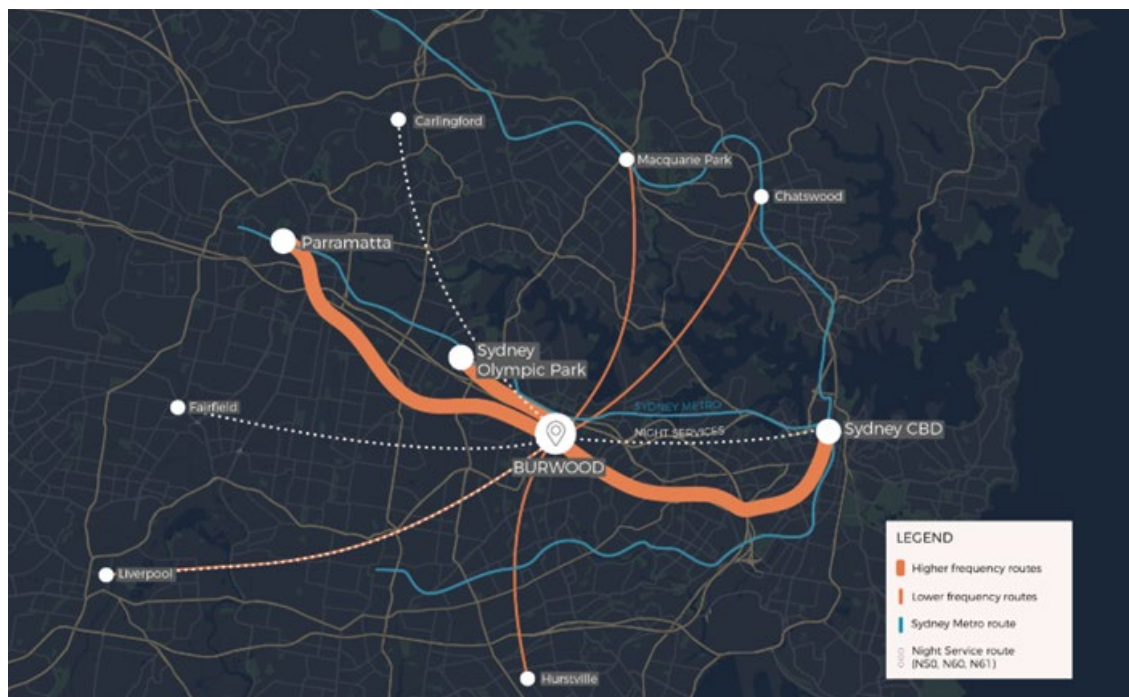
### Public transport

Burwood is serviced by several modes of transport from across Greater Sydney. This includes approximately 4 train lines, 20 unique bus routes, and the future Sydney Metro. Several of these routes capture Burwood as an origin and end destination, including M90 Liverpool to Burwood and 461X City Domain to Burwood. Burwood Station is the major

transport hub in the precinct – in 2019, Burwood was ranked the 15th busiest station on the Sydney Trains network, recording some 20,040 entry and exit movements on a typical weekday<sup>5</sup>.

Several dedicated night services also operate passing through Burwood – N50 (Liverpool to City Town Hall via Strathfield), N60 (Fairfield to City Town Hall via Strathfield), and N61 (Carlingford to City Town Hall via Strathfield). These bus services provide late-night connections to the CBD throughout the week, passing through Burwood Station every 30 minutes between 12:30am and 4:30am.

The following transport map highlights Burwoods primary connections to Sydney CBD, Parramatta and Sydney Olympic Park, in addition to second-order connections, Sydney Metro and night bus services.



5 Monthly Opal Usage Data, Transport for New South Wales, 2023.

# Place Audit



JOC Consulting undertook an audit of the Burwood Town Centre on a Tuesday night between 6pm to 8pm in July 2023. Winter months traditionally see lower patronage for late night venues. No events were underway on the night of the audit. Despite this, the three anchor late night uses being Westfield, Burwood

Chinatown and Emerald Square were noticeably busy with activity. Burwood Railway Square and the entrance to Burwood Westfield had a high number of pedestrian movement activities, averaging over 2000 pedestrians an hour between 6pm to 7pm.

<p><b>1. Burwood Railway Square</b> (cnr Burwood Rd &amp; Railway Pde)</p> <p><b>2202</b> pedestrians an hour</p>	<p><b>2. Burwood Westfield</b> (Burwood Rd entrance)</p> <p><b>2142</b> pedestrians an hour</p>	<p><b>3. Emerald Square</b></p> <p><b>1482</b> pedestrians an hour</p>	<p><b>4. Deanne Street Plaza</b></p> <p><b>459</b> pedestrians an hour</p>
<p><b>5. Cnr Clarence Street &amp; Burwood Road</b></p> <p><b>372</b> pedestrians an hour</p>	<p><b>6. Burwood RSL</b></p> <p><b>60</b> pedestrians an hour</p>	<p><b>7. Burleigh Street</b></p> <p><b>55</b> pedestrians an hour</p>	<p><b>8. Elsie Street</b> (Service NSW entrance)</p> <p><b>25</b> pedestrians an hour</p>



# Lighting Audit

Lighting at night is a crucial component of safety and wayfinding for users of a town centre. JOC Consulting conducted a lighting audit, testing each location against a series of questions informed by CPTED

principles. The outcome of this audit is detailed below. Four key areas were identified that required short-term prioritisation to address significant gaps in lighting.



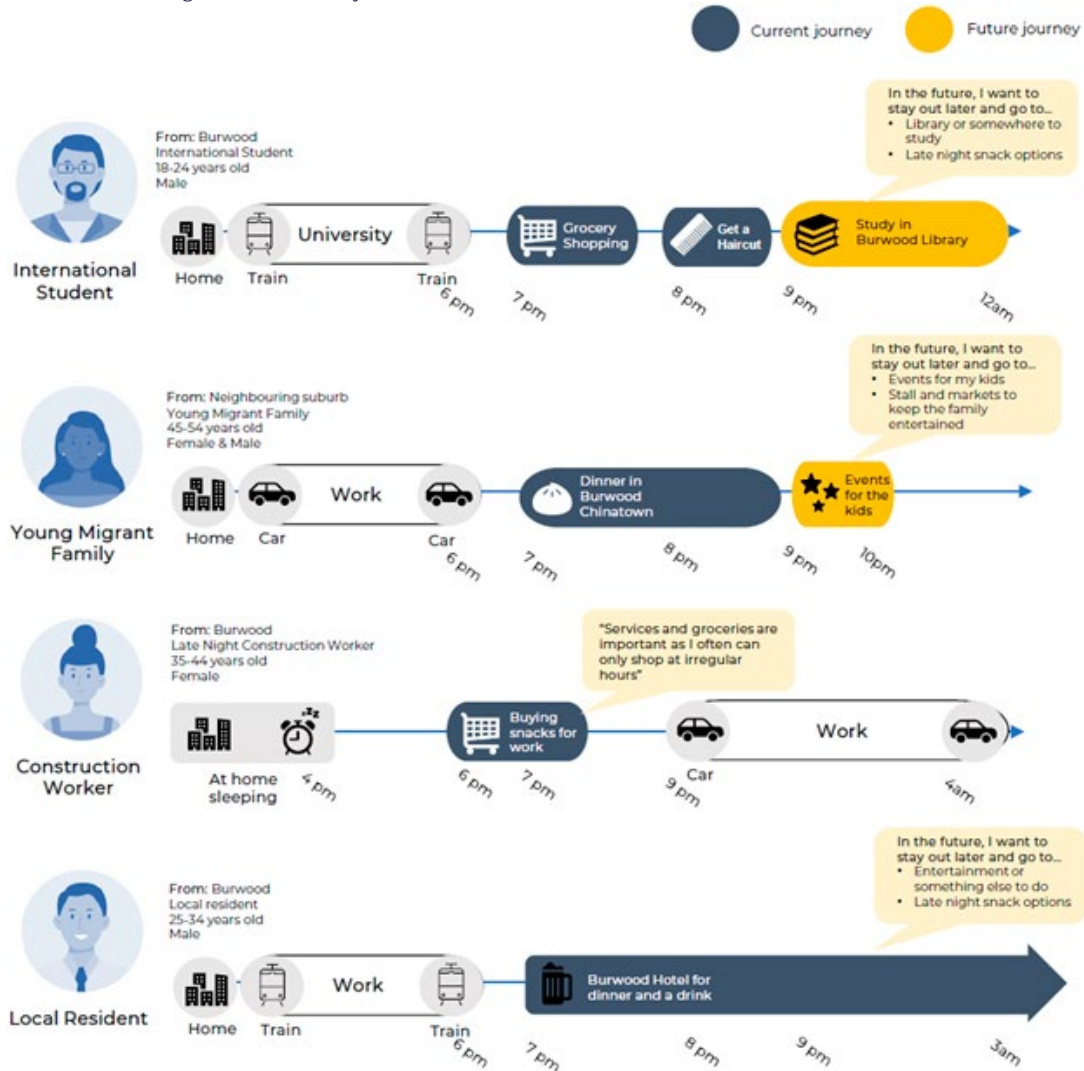
**Legend**

- Lowest scoring area (high priority)
- Medium score (medium priority)
- Highest scoring area (low priority)



# Journey Mapping

As outlined in the Discussion Paper, the Burwood Town Centre attracts a wide and diverse crowd. During engagement, JOC Consulting heard from a variety of these different groups. Their journey across the town centre, and desires for its night time economy have been detailed below.



## Our Late Night Workers

Burwood is home to a growing number of residents who work outside the traditional 9am to 5pm window. These workers have a very different set of needs and requirements compared to those who work day-time hours. Over 50% of survey respondents stated they do

their grocery shopping in the evening, and an analysis identified that up to 40% of residents who live in the Town Centre are employed directly or in-directly with late night businesses. This strategy will therefore also explore how our town centre can better support our late shift workers alongside expanding our destination qualities.

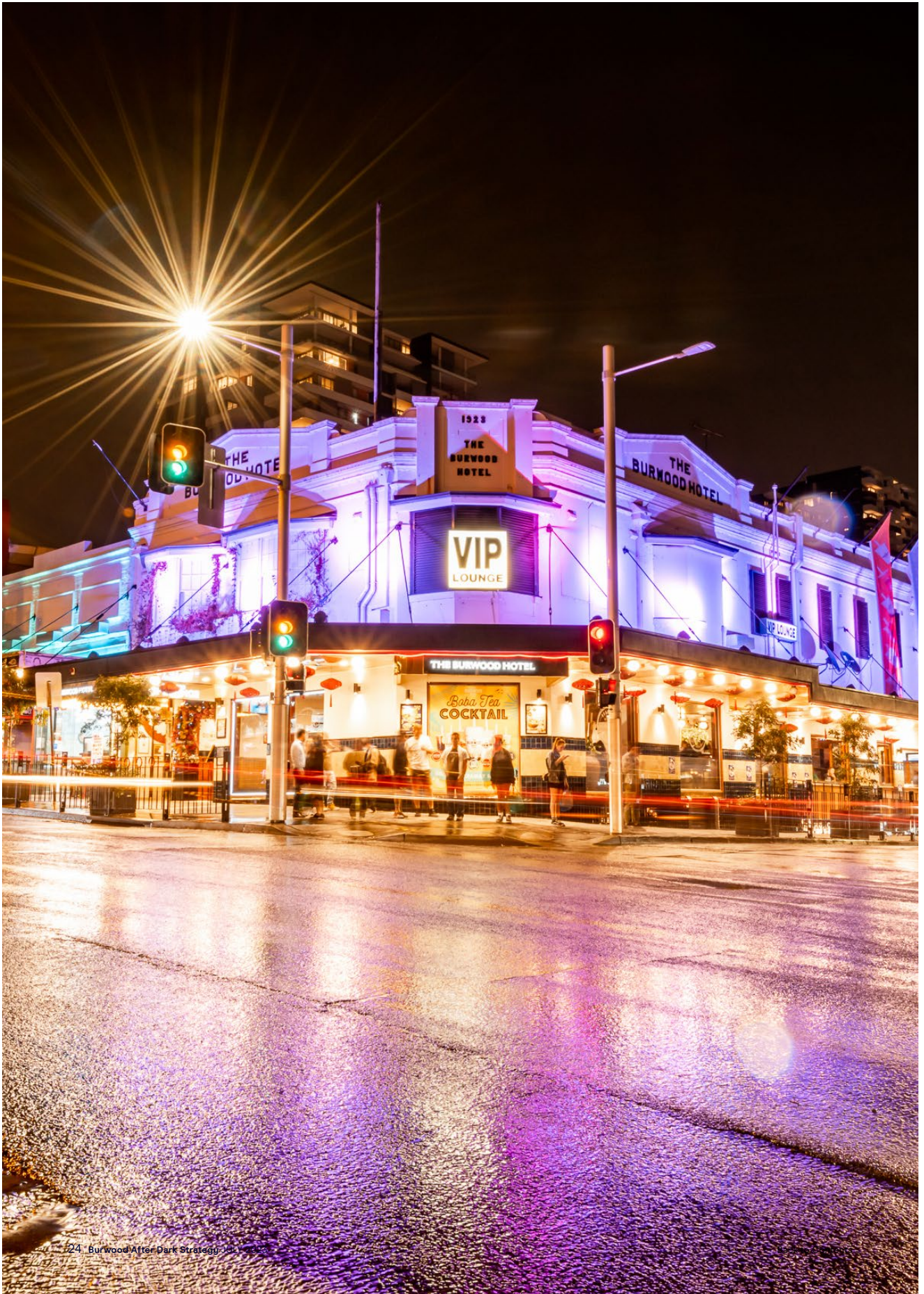
# Drivers of Change

Burwood is subject to several external factors that are driving and shaping trends and demand. These drivers present an immense opportunity for council to capitalise on their existing strengths and deliver

lasting changes that shape the way residents and visitors use the area’s night time economy. The key drivers of change have been listed below, with their opportunities identified.

	Description	Opportunity
<p><b>High population growth</b></p> 	<p>The Burwood LGA is forecasted to receive substantial population growth – more than double the projected population increase for NSW over 2021 – 2041.</p>	<p>Explore new retail models and businesses to capture a growing cohort of ethnically diverse young adults.</p>
<p><b>Retail floorspace demand</b></p> 	<p>Burwood is one of the largest retail centres in the area and will experience significant retail floorspace demand met by new development.</p>	<p>Leverage existing and dedicate new spaces for night time economy anchor uses, such as a large entertainment venue or late night hub.</p>
<p><b>Urban renewal</b></p> 	<p>Burwood will undergo significant urban renewal and redevelopment, particularly those with prominent locations along Burwood Road.</p>	<p>Fix legacy public domain issues within the town centre that impact the night time economy as sites are redeveloped in key locations.</p>
<p><b>Destination qualities</b></p> 	<p>Burwood has a growing reputation as a food and dining destination with an authenticity that is rivalling both established and upcoming markets.</p>	<p>Diversify the offering of the town centre that leverages the existing crowd and reputation and continues to grow the space.</p>
<p><b>Public transport</b></p> 	<p>The Burwood North Metro Station under construction will notably impact the urban fabric of Burwood and strengthen connections to a range of key destinations, including the future Western Sydney Airport.</p>	<p>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.</p>
<p><b>Local focus</b></p> 	<p>Burwood will experience an increased demand for local services as additional residents work from home and on flexible arrangements.</p>	<p>Leverage changing consumer patterns to encourage more activity and capture spending locally.</p>
<p><b>Social changes</b></p> 	<p>Burwood will capitalise on broader social attitudes and behaviours towards the night-time economy, demanding more late night activities that do not centre on alcohol.</p>	<p>Capitalise on the demand for late night venues that do not rely on alcohol, such as entertainment, cultural and creative venues.</p>









# Barriers and Challenges

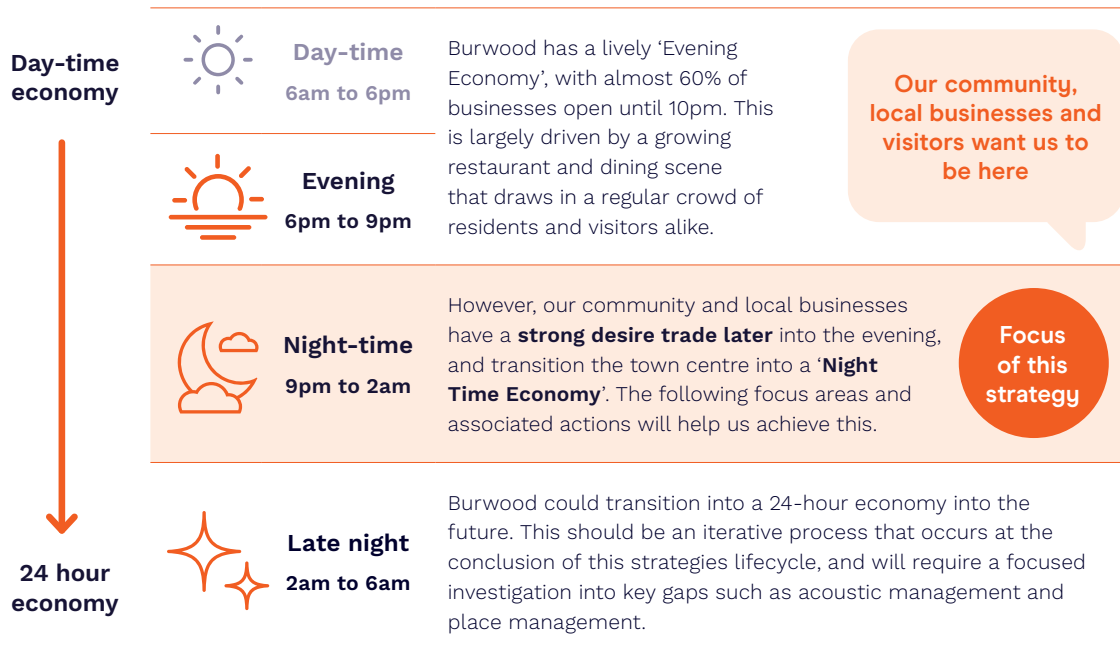
Burwood is a highly successful example of the organic growth of a local night time economy. Despite its success, there are a number of barriers that are preventing the area from reaching its true potential

as a late night destination within Greater Sydney. The following barriers have been identified as part of the background research undertaken for this Strategy.

	Description	Opportunity
<p><b>Marketing and branding</b></p> 	<p>Burwood has a strong food and restaurant scene popular within south Asian diaspora, though not strongly marketed to other communities within Greater Sydney.</p>	<p>Market Burwood to Sydney's residents, linking to larger regional events such as Sydney Fringe or Sydney Comedy Festival.</p>
<p><b>Limited economic diversity</b></p> 	<p>Burwood has a local and regional reputation as a hub of restaurants and food offerings, though limited diversity in culinary and activity offerings is a barrier to building on this reputation to bring in a broader audience.</p>	<p>Diversify local business offerings within Burwood, such as entertainment and cultural activations, to bring in a broader audience.</p>
<p><b>Activity drop-offs (after 10pm)</b></p> 	<p>The Burwood Town Centre has a noticeable drop-off of business activity and pedestrian movement after 10pm; businesses do not feel there is enough demand to open later, and pedestrians won't come out as it feels empty after 10pm.</p>	<p>Incentivise businesses to open up later and trade in public places, while fostering safe public spaces for pedestrians and vibrant business activity.</p>
<p><b>Place-based challenges</b></p> 	<p>The Burwood Town Centre has several sub-precincts with unique place-based challenges, related to poor lighting, safety, or transport connectivity – fine grain changes are critical to helping improve perceptions and dwell time in Burwood after dark.</p>	<p>Develop a targeted approach for each sub-precinct based on improvements to amenity, safety, and public enjoyment in Burwood.</p>
<p><b>Lack of creative and cultural drawcards</b></p> 	<p>Existing cultural draw-cards such as Burwood Chinatown are heavily food based. After having dinner, there are limited options for things to see and do.</p> <p>Burwood does not have a dedicated creative or cultural expression space that can draw a crowd, unlike other key night time destinations in Sydney. To continue diversifying the offering at Burwood, creative and cultural venues will need to be pursued.</p>	<p>Investigate opportunities to bring in a drawcard cultural venue of a complementary use to Chinatown, including opportunities emerging from the Burwood Place development – Arts and Cultural Centre.</p>
<p><b>Limited 'spill out' spaces</b></p> 	<p>Burwood currently has limited public open space within proximity to the existing late night activity on Burwood Road and Chinatown, preventing businesses from trading outside of stores and impacting pedestrian flows to and from the station.</p>	<p>Leverage opportunities presented by existing pedestrianised spaces such as Deane Street and new developments such as Burwood Place.</p>

# Our Strategy

Burwood 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. The pillars and actions in the following strategy will explore how we can continue to grow our night time economy.



## Focus Areas

A 10-year vision for improving the night time economy across Burwood Town Centre is supported by four focus areas.

<p><b>PLACE</b></p> <p>Burwoods night-time economy is anchored by the foundations of a great place that is safe, vibrant, and diverse.</p>	<p><b>CONNECTION</b></p> <p>Burwoods night-time economy is strengthened by well-connected transport and infrastructure.</p>
<p><b>EXPERIENCE</b></p> <p>Burwoods night-time economy is revitalised by a diverse range of experiences.</p>	<p><b>DESTINATION</b></p> <p>Burwoods night-time economy is recognised as a destination with local and visitor appeal.</p>

**Our community's ideas and priorities have confirmed these focus areas as key priorities for the Burwood After Dark Strategy.**

**The focus areas will help take Burwoods current stage of growing night time economy into an established stage where activity and investment is self-sustaining.**



# Focus Area 1 – Place

Burwood is a special place on the cusp of an urban transformation. Rapid urban growth provides an opportunity to embed safe and vibrant places within Burwood's public domain, nurturing a growing culture of placemaking. Ignited at night, Burwood is celebrated as a place for people.

## Context

At the core of any city's successful night-time economy is a well-designed place. From large-scale public domain works to fine-grain placemaking activations, there are a range of factors that contribute to a positive experience and the overall 'feel' of a place after dark. The safety, walkability, and activation of public space are essential considerations for the night-time economy. These interventions need to be complimented with well-designed new development to ensure the amenity of existing and future residents.

## The current state of the night

A range of large scale urban renewal projects and placemaking initiatives have been delivered such as the Deane Street Precinct transformation, Burwood Laneways, Unity Place Activation and Burwood Bounce Back. Commonly, these activations integrate arts and cultural development outcomes, such as public art and programmed entertainment that support local artists.

Burwood is also recognised as a generally safe area, with lower incident rates compared to the rest of NSW. Maintaining a safe night time environment and positive community perception of Burwood during late hours will be key to increasing night-time activity and visitation.

## What we heard



- Local residents living in new nearby residential development was the largest customer base of Burwood at night, and were strongly supportive of increasing the local offerings. Local residents cautioned the need to find a balance between activity and noise management.
- Participants identified that Burwood was 'suffering from success' with footpaths often overflowing to and from key anchor uses.
- Businesses and residents expressed a need for more placemaking interventions and public art to make the night time more exciting.
- Visitors identified there is limited space to spend time that aren't inside restaurants, and wanted more outdoor public space to spend time in.

## Our future state

- Burwood undergoes a **transformative change** driven by city-shaping developments, such as Burwood Place, which includes the creation of the Burwood Urban Park Arts and Culutral Centre.
- **Creative placemaking initiatives** are utilised to enhance safety measures and lighting across the city, creating an environment that feels secure and inviting.
- New interventions and events are introduced to redefine Burwood as a unique and vibrant place, attracting a **diverse range of residents and visitors**.
- **Pedestrianisation efforts** and human-scale placemaking initiatives are implemented, providing an enhanced experience for pedestrians and creating an inviting environment for people to explore.

## Actions

No.	Action	Role	Timeframe
1.1	Investigate amendments to local planning policy, including: <ul style="list-style-type: none"> <li>Implementation of a 'agent of change' principle such as a SEP to recognise the growing role of the NTE for Burwood</li> <li>Investigate strengthening noise attenuation requirements for new residential developments in the city, particularly for those within adjoining existing hubs of activity</li> <li>Enable later closing times for low impact venues through a simplified approval process</li> <li>Investigate planning mechanisms to allow low-risk and small scale cultural uses to be classified as exempt or complying development in the Burwood Local Environmental Plan (BLEP)</li> <li>Incentivise new cultural and creative floor space in new developments through planning controls</li> <li>Investigate land use controls to encourage the promotion of hotels and short-term stays within the Burwood Town Centre</li> </ul>	Implement	Ongoing, S, M, L
1.2	Support and encourage community and business led placemaking initiatives within night time sub-precincts, such as busking, events and activations	Advocate	Ongoing
1.3	Support and encourage community and business led placemaking initiatives within night time sub-precincts, such as busking, events and activations	Implement	Ongoing, S
1.4	Identify the Burwood Town Centre as a late night precinct in Section 10.7 certificates	Implement	M
1.5	Encourage and work with developers and existing venues to enable new spaces for new cultural and creative venues to establish themselves within the Burwood Town Centre	Collaborate	Ongoing, L
1.6	Explore improvements to lighting on a place-based approach, building on gaps identified in the lighting audit	Implement	L
1.7	Regularly audit and identify vacant commercial and Council-owned buildings and identify sites that may support pop-up, short or long term lease arrangements that support night time uses, with a focus on cultural and creative uses (such as live music)	Implement	Ongoing, M
1.8	Undertake detailed bi-annual lighting audits of the Burwood Town Centre to monitor safety	Implement	Ongoing, M
1.9	Partnering with public art, cultural and creative operators to enable new placemaking and events in Burwood	Collaborate	Ongoing, S



I want Burwood to be a place that invites, inspires and infuses a sense of place that is cosmopolitan, elevated and internationally flavoured

Survey participant



We want more lighting! People are drawn to 'instagrammable' places

Pop-up participant



We want VIVID to come to Burwood!

Pop-up participant



The Burwood Town Centre needs to balance the needs of residents who reside in and around the town centre whilst having an exciting night culture

Survey participant





## Focus Area 2 – Connection

Burwood is well-connected with a world-class transport system and geographical advantage. New infrastructure such as WestConnex and Sydney Metro West allow Burwood to leverage its strategic position between Sydney CBD, Parramatta and Sydney Olympic Park to facilitate movement for residents, commuters and visitors alike.

### Context

A successful night city is one that is well-connected and universally accessible. Public and active transport options are critical to ensure that night-time experiences are easy to get to and allow for a safe and easy trip home. Internal connections such as well-lit footpaths, laneways and wayfinding are equally important to allow visitors to connect and move through a space at night.

### The current state of the night

Burwood is strategically located as a central hub between Sydney CBD and Parramatta CBD. Burwood is generally well-served by the bus and train network during the day, with four train lines and over 19 existing bus routes operating through the Burwood Town Centre. Night bus services operate to Carlingford, Fairfield and Liverpool to the Sydney CBD.

Nearly two thirds of visitors to the town centre at night either take public transport or walk. In-fact our centre was so successful at night, a number of visitors stated the footpaths needed widening to accommodate the number of night time participants. Visitors positively responded to efforts to pedestrianise the town centre, but noted further work was still required.

Approximately one third of all participants said they drove to Burwood at night. Of those who drove, they experienced issues finding a parking space, or weren't aware of other carparks available across the centre.

### What we heard



- Two thirds of visitors either walk or take public transport to Burwood at night.
- Safety was a top priority for businesses, visitors and residents. It is noted that participants stated that Burwood felt much safer than other centres at night.
- Residents identified that while the high streets (such as Burwood Road) are well-lit, the back streets to residential apartments was dark and felt unsafe.
- A number of visitors identified it was hard to find venues at night, and were unaware of key anchor tenants in the town centre (such as Emerald Square).
- Finding a parking space was an issue for those who drove. It is noted that most participants were unaware of alternative parking spaces in the town centre (such as the Council owned carpark on George Street).

### Our future state

- **Active and public transport** continue to be the primary way our visitors move to and from Burwood at night
- **Parking** is available for residents and visitors in our centre at night
- Transport and parking across the town centre is **safe, easy and accessible** at night
- Key areas of activity feel visibly connected through **creative and functional wayfinding**

## Actions

No.	Action	Role	Timeframe
2.1	Collaborate with public transport providers to encourage additional train and bus services that match business closing times within the city centre at night	Advocate	Ongoing, L
2.2	Explore the further pedestrianisation and walkability of sub-precincts, focusing on Burwood Road Eat Street and Entertainment Central	Implement	S, M
2.3	Encourage businesses to implement outdoor dining as streetscapes are pedestrianised across the Burwood Town Centre and investigate opportunities to increase business take-up or expansions	Collaborate	Ongoing, S
2.4	Investigate parking schemes, including a modification to current parking policy for council owned carparks at night (e.g. timed parking after 6pm)	Implement	M
2.5	Develop and implement creative night time wayfinding to key anchor uses and precincts, building on the gaps identified in the Lighting Audit (e.g. between Chinatown and Emerald Square)	Implement	S
2.6	Investigate the use of defined set-down and pick-up points for Rideshare within the town centre	Implement	M
2.7	Advocate for the Burwood Town Centre to be accredited under the Purple Flag program and become part of a wider Neon Grid of Greater Sydney	Advocate	M





Buses, specifically the 410/420, only run every hour late at night

Survey participant



We need to activate Burwood Road and remove the cars

Survey participant



The footpaths are full, we need wider streets!

Pop-up participant



Burwood would be better if the main road was closed and only open to pedestrians and parking was better

Survey participant





## Focus Area 3 – Experience

Burwood is a place where you'll experience food, restaurants and dining that is found nowhere else in Australia. We have organically cultivated an authentic hub of diverse businesses and non-alcoholic offerings. This core business of night time activity needs to be supported and compatibly expanded into the future. This night time activity will also support our late night workers.

### Context

The most successful night-time economies around the world provide a mix of attractions that consider a diversity of cultures, ages, income-levels and interests – rather than focusing on strengthening a single sector. A range of offering types and costs means that residents and visitors are able to contribute to the night-time economy in accordance with their needs and desires. There is an interdependency amongst every part of the night-time ecosystem – restaurants, services and cultural institutions are integral to this mix.

### The current state of the night

The evening dining appeal of Burwood is already strong, championed by a number of key anchor tenants such as Burwood Chinatown, Burwood Westfield and Burwood RSL. Burwood also has a unique constellation of non-alcoholic offerings compared to other popular night-time centres across Sydney. With this established identity of great international food and authentic dining, Burwood can leverage opportunities for complementary creative and cultural activities that complete the night-time experience.

Burwood also has a growing resident workforce who work night shifts. Compared to those who work day-time hours, our resident night time workforce currently have limited access to the basic everyday services and stores needed such as groceries, pharmacies, doctors etc.

### What we heard



- Both businesses and community expressed they'd like to stay out much later than they currently do in the Burwood Town Centre but stated there was little to do after dinner.
- Visitors strongly desired more to see and do after dinner, such as indoor performance spaces with creative and cultural entertainment, dessert options and events at night.
- Businesses would like to trade later, but identified issues around getting approval, staff safety, outdoor dining permits and getting staff.
- Over half of participants surveyed were happy to spend double of what they currently spend now in Burwood, but found that there was a lack of places to spend on high end experiences and restaurants.
- Local residents wanted to access a number of key community venues such as Burwood Library and Burwood Park after dark, but weren't able to due to limited opening hours or limited lighting.

**Our future state**

- **Businesses open later** to meet the demand of residents, with areas of Burwood transitioning to 18-hour economies
- **Business diversification**, focused on encouraging a broader mix of offerings (cultural and creative uses) and price (both high end and low cost options)
- **Stores, services and community facilities**, are open later to support our growing number of late night workers, and residents who want access to services at night
- **Live music**, entertainment and recreational uses are drivers of night time activity across our town centre
- **Arts and cultural expression** are a part of Burwood’s urban fabric, showcased across the Town Centre in both visible and unexpected places



Lots of Western Sydney artists want to perform but can't find anywhere locally. They either perform in the east and feel out of place, or just don't perform at all and don't get a chance to grow. If we could perform locally we'd love to



**Indoor performance spaces**

was overwhelmingly identified as the number one priority by the community to stay out later

**Actions**

No.	Action	Role	Timeframe
3.1	Encourage core late night businesses (e.g. restaurants and food vendors) to open later (e.g. 12am) in alignment with the sub-precinct focus areas for trading hours	Collaborate	Ongoing, S
3.2	Encourage late night businesses to stay open later (e.g. 10pm) to service a growing population and late night workers	Collaborate	Ongoing, S
3.3	Attract or deliver a key landmark cultural events or festivals which complement the existing community and local businesses (e.g. adjoining Chinatown)	Implement	Ongoing, M
3.4	Investigate the potential to trial extended opening hours for Council facilities at night (such as Burwood Library) to become a 24hour hub	Implement	Ongoing, S
3.5	Maintain a dialogue with major retail tenants, developers and land owners to encourage business diversification that complement our existing offering, with a focus on attracting higher end restaurants and uses, and entertainment and cultural uses	Advocate	Ongoing
3.6	Ensure existing and future performance and cultural spaces (such as the Burwood Urban Park Arts and Cultural Centre) open late and are accessible to local artists	Collaborate	Ongoing, M
3.7	Encourage and work with existing and future licensed venues to adopt and make space for live music within the Burwood Town Centre	Advocate	L
3.8	Partner with social enterprise businesses/entertainment anchor tenants to participate in the night-time economy (e.g. Sydney Fringe Festival)	Collaborate	S, M
3.9	Trial the extended opening hours of community venues such as Burwood Library and Burwood Park	Implement	S
3.10	Establish a Public Art Program that promotes the role of interactive public art in unexpected places, such as an interactive night time public art trail	Implement	M



Live music, arts is where  
Burwood is lacking

Survey participant



I work late and its hard to  
get groceries after dark

Pop-up participant



Can we make the library  
open later? I often study  
late into the evening

Pop-up participant



If Chinatown has late night  
events we also stay open later  
and get lots of trade from it

Local business owner





## Focus Area 4 – Destination

Burwood is a late-night destination that is well-promoted for its cross-cultural identity. With a distinct domestic and international appeal, Burwood is the place to be – people feel genuinely attracted to visit and enjoy the business diversity on offer.

### Context

The most iconic and memorable places at night are those which are defined as a late-night destination – providing services and experiences after dark that cannot be matched elsewhere. These destinations are established through a combination of a uniquely diverse night-time offering, and marketing and promotional strategies that place it on the map. With a unified night vision cities can successfully attract domestic and international visitation to drive greater night-time activity and investment – in turn supporting their daytime counterpart.

### The current state of the night

Burwood is an established dining and retail destination well-known amongst the South-East Asian diaspora living in Sydney. Anchor tenants and individual groups have undertaken marketing campaigns and local place branding which has helped foster local awareness of Burwood. However, broader community and visitor awareness across Greater Sydney is limited.

Burwood's role as a destination for overseas migration has helped create an informal international profile for the town centre. The centre is also fortunate to be the home of well-known international chains and brands that are found nowhere else in Australia, reflecting our international reputation.

### What we heard



- Participants would like to see the Burwood Town Centre become a renowned destination for late-night unique dining, cultural and leisure activities, drawing inspiration from vibrant Asian cities such as Hong Kong, Singapore, and Seoul.
- Late night businesses that did not operate in the Burwood Town Centre were unaware of the existing night time economy that had established in Burwood, but were actively interested in how they could open up and compliment the offerings of the centre.
- Within Sydney, we aspire to be livelier and a bigger cultural hub than Newtown and the Sydney CBD.
- The Burwood Town Centre is a go-to destination for international brands and companies to setup within Sydney.

### Our future state

- Burwood is a **leading night time destination** within the Greater Sydney region
- **Domestic and international visitors** are aware of the availability and exciting things on offer in our town centre
- We attract businesses that **complement our anchor night time uses** such as Chinatown, Burwood RSL and Emerald Square
- Leveraging opportunities for **international appeal** by providing a range of cross-cultural experiences
- Burwood's cultural and creative identity is celebrated, **expanded and recognised across Greater Sydney** and beyond

## Actions

No.	Action	Role	Timeframe
4.1	Prepare a Visitation and Investment Prospectus that highlights Burwood's key assets	Implement	S
4.2	Develop place branding for the Burwood Town Centre	Implement	M
4.3	Collaborate with local venues and operators to deliver a business-led place activation program (e.g. Uptown Program that markets the Burwood Town Centre)	Collaborate	S
4.4	Undertake marketing campaigns targeting Sydney residents to raise the awareness of Burwood's Night Time Economy	Implement	Ongoing, M
4.5	Investigate and reach out to international partners who are marketing the Burwood Town Centre overseas	Collaborate	Ongoing, L
4.6	Consult and collaborate with international brands who have setup in Burwood to understand why they setup in the town centre, and how we can continue to attract new overseas businesses	Collaborate	Ongoing, L
4.7	Broker opportunities for potential anchor tenants in culture or entertainment to participate in the night-time economy (e.g. within the future Burwood Cultural Centre)	Collaborate	L
4.8	Establish a Community Public Art Project or similar collaborative initiative focused on creating a landmark cultural piece for Burwood Town Centre	Implement	Ongoing, M
4.9	Trial the extended opening hours of community venues such as Burwood Library and Burwood Park	Implement	S
4.10	Establish a Public Art Program that promotes the role of interactive public art in unexpected places, such as an interactive night time public art trail	Implement	M

“

I want Burwood nightlife to be similar to the nightlife in Asia, where nightlife is not only about drinking

Survey participant

”

“

We could be renowned for our Singaporean hawker stores and late night shopping

Survey participant

”

“

We should be Like Hong Kong, a city that never sleeps with art and culture

Survey participant

”

“

We aspire to have a night-life like Hong Kong, Bangkok, Kuala Lumpur, Shibuya, Taipei, Seoul, Shanghai

Survey feedback

”





# Implementing the Framework

## Delivery Types

Council recognises our responsibility in helping foster an inclusive and diverse night time economy. However, it is important to note that while Council can help enable and facilitate the late night economy, Council's capacity to directly act can be limited. To achieve our vision, it will require a collaborative effort with many different stakeholders who all play different roles in our cities future. The role of Council in delivering this strategy is outlined below:

Role	Description
<b>Implement</b>	Being the lead for the implementation of an action within the town centre. This can also involve being the leading collaborator with other stakeholders to deliver an action.
<b>Collaborate</b>	Working, supporting and partnering with a variety of stakeholders to enable a vibrant late night economy, where often Council is not the lead stakeholder.
<b>Advocate</b>	Council will pro-actively elevate the sentiment of our community, and use our platform and organisation to advocate changes from external bodies, such as State Government and Industry.



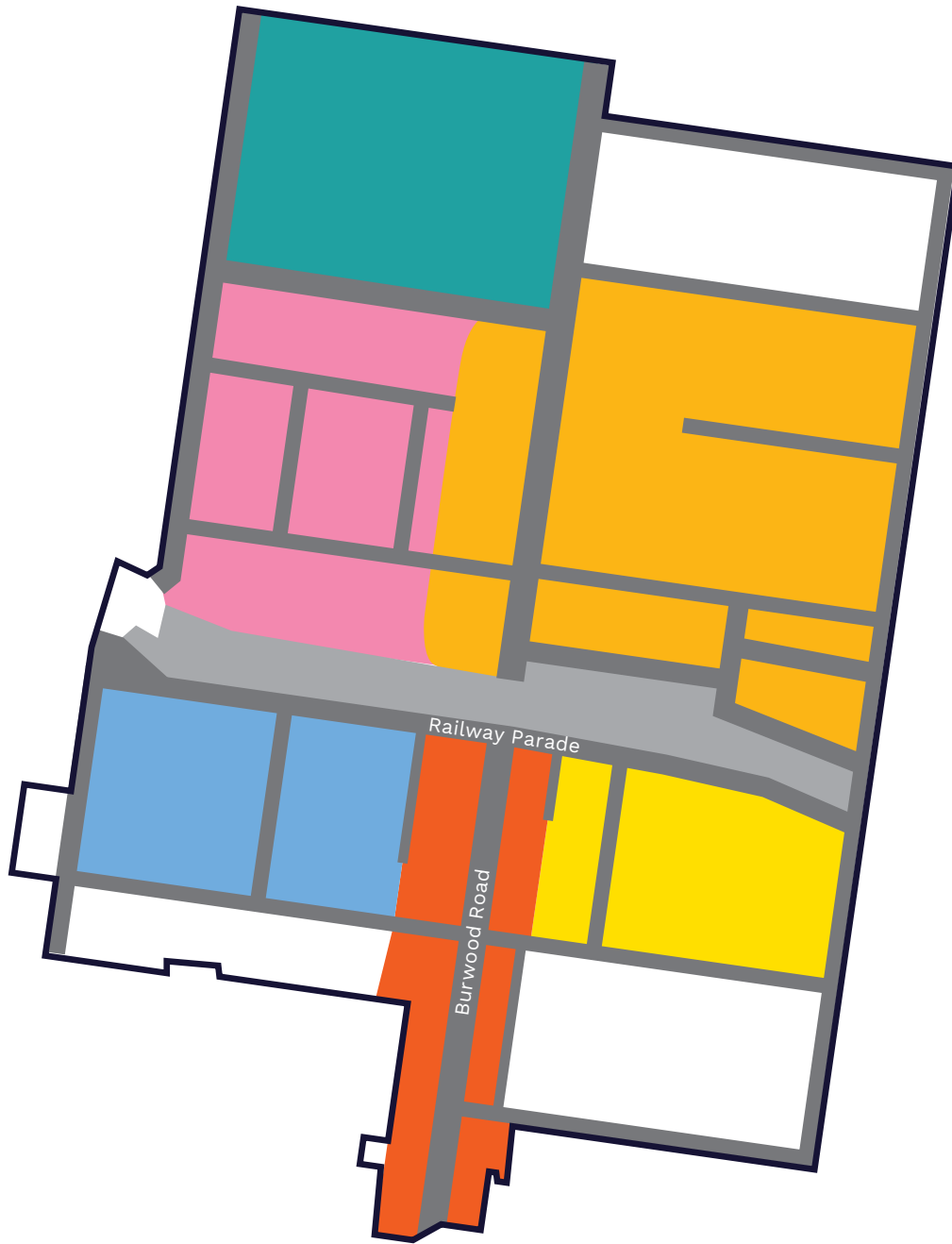
## Delivery Timeframes

Our action plan has been developed to provide deliverable and accountable actions aligned with Council's various strategies and reporting to enable the development of our city.

Ongoing	Short	Medium	Long
<b>Council to continue over the lifetime of this strategy</b>	<b>0-1 years</b>	<b>2-5 years</b>	<b>6-10 years</b>

# Our precincts after dark

Burwood is comprised of a diverse and dynamic network of places, each with their own unique identities and offering. These sub-precincts 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 our centre as a desirable place to live, learn, work, rest, and play.



**Legend**

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



The following pages identify seven 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:

Current	Future	
 <b>Burwood Road Eat Street</b>	 <b>Commercial Core</b>	 <b>Twilight Park</b>
 <b>Cultural Quarter</b>	 <b>Innovation Hub</b>	 <b>Burwood North</b>
 <b>Entertainment Central</b>		

[Back to Contents](#) [Burwood After Dark Strategy July 2023 107](#)



## Measuring our night time activity

The night time economy of Burwood is driven by the growth in a number of sub-precincts that span across the Town Centre. To help with the management of these sub-precincts, a series of benchmarking classifications have been developed which cover across the various social, environmental and economic attributes of place. These benchmarking classifications are intended to act as qualitative targets to achieve. As they are place-based, the hard targets of total businesses may not be applicable from one precinct to another.

### Economic Activity

The primary driver of the night time economy are the local businesses that attract an audience to a space. The classifications are heavily linked to the number of late night businesses that define both the activity and attraction to the area. Businesses trading hours and the diversity of offering are a large factor in driving the night time economy. Council, state government and local businesses play a role in the economic activity attribute.

### Environmental Place Measures

The Power of 10+ is a placemaking principle that contributes to the physical infrastructure of a space. A quality destination requires good infrastructure to support it. To compliment the economic data, sub-precincts are also analysed to understand how people can use and move across a space. Places with limited infrastructure will be constrained and prevented from growing. Both council and private businesses can contribute to this outcome.

### Social Place Branding

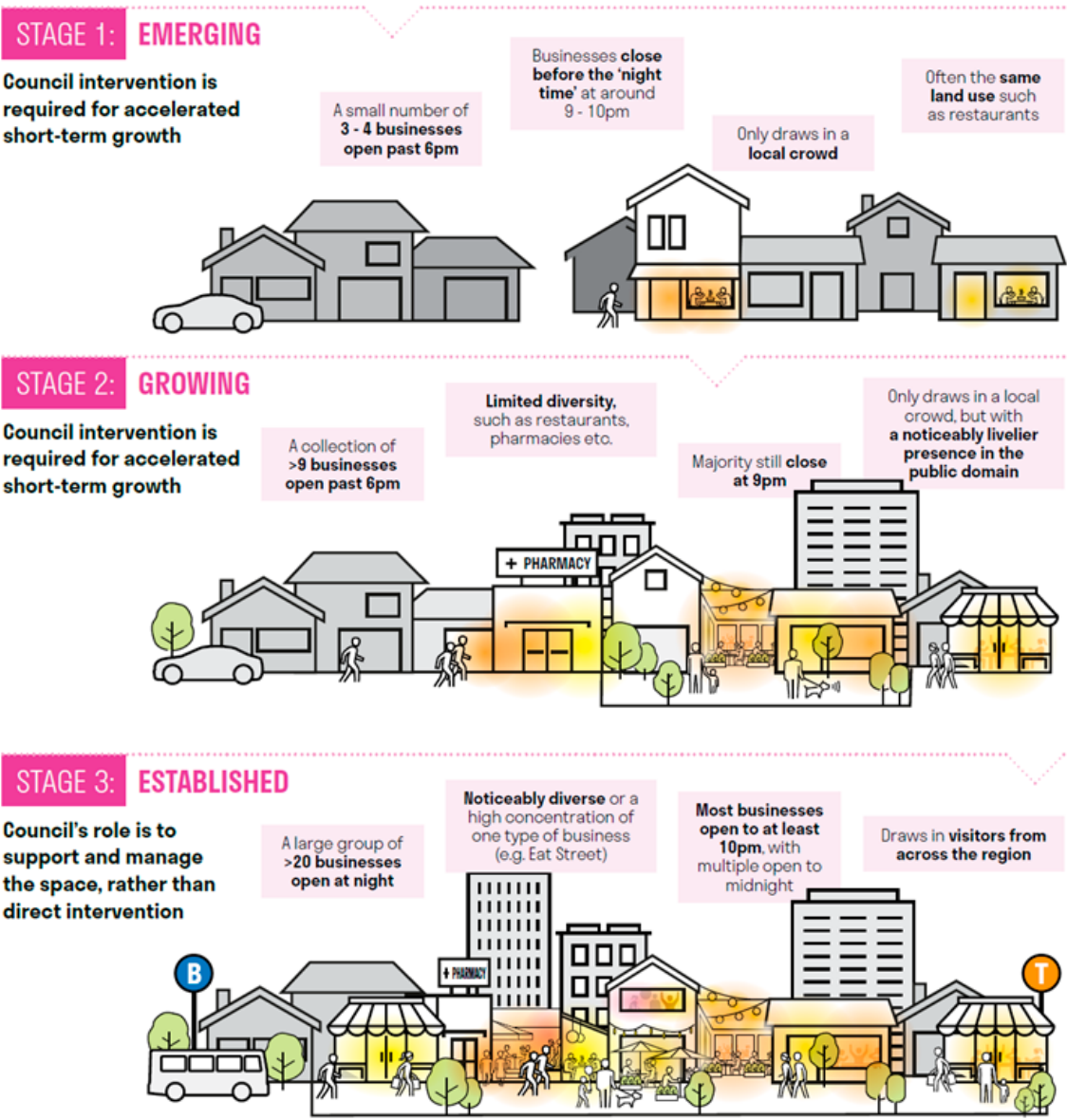
A softer and difficult to measure component of the night time economy is whether a place is in the public consciousness. A social place branding is crucial in generating interest and foot-traffic in a space, but will often require the combination of the economic and environmental attributes to help get it to this stage. While council can play a role in defining the brand of a space, this attribute is driven by the local businesses and visitors of a space.



Classification	Economic Activity	Environmental Place Measures	Social Place Branding	Draw
<b>Emerging</b>	A small grouping of businesses with minimal impacts	One to three factors	No branding	Local
<b>Growing</b>	A growing group of local businesses with a noticeable presence on the public domain	Three to five factors	Limited branding	Local
<b>Established</b>	A collection of established businesses with a regular crowd and event program	Six to eight factors	Established reputation	Regional
<b>Destination</b>	A go-to location for new hospitality and late night businesses and visitors	Nine or more factors	Regional icon	Regional







# Existing Night Time Sub-Precincts

Below is a summary of the key existing night time economy sub-precincts within the Burwood Town Centre. These sub-precincts already attract a consistent crowd to the area and will continue to do so into the future.

## Burwood Road Eat Street

Status: Established (Stable)

Time	We're here				We want to be here								
	6pm	7pm	8pm	9pm	10pm	11pm	12am	1am	2am	3am	4am	5am	6am
% businesses open	100%	97%	97%	82%	28%	13%	8%	3%	0%	0%	0%	0%	0%

The go-to destination for new visitors arriving in Burwood, the Burwood Road Eat Street is an established night time activity hub that draws in a regular crowd. Driven by Burwood Chinatown and the restaurants along Burwood Road, this sub-precinct has helped cement Burwood's night time branding as a food and non-alcoholic driven area. Connections of this sub-precinct to other key venues in the area such as the Burwood RSL are also critical in helping continue the growth of our night time economy.

Noting the types of businesses that already operate, and the availability of current and future public open space for events, this sub-precinct will continue to be the focus of the night time economy of Burwood. There is significant potential for this area to open well into the 'Night time' (9pm to 2am) given its limited alcohol offerings.





## Cultural Quarter

Status: Growing (Stable)

Time	We're here			We want to be here				1am	2am	3am	4am	5am	6am
	6pm	7pm	8pm	9pm	10pm	11pm	12am						
% businesses open	100%	86%	86%	57%	21%	21%	21%	3%	0%	0%	0%	0%	0%

The Cultural Quarter is a quickly growing sub-precinct that is primarily driven by the diversity of restaurants and entertainment available in Emerald Square. Despite being new to the area, this space has grown a reputation for its late night offering. It is important to note that this space will likely be impacted by the approved redevelopment of Burwood Place. Upon the completion of Burwood Place, this sub-precinct will gain a significant drawcard and benefit from the new public open spaces and residents living in the area.







## Entertainment Central

Status: Growing (Stable)

Time	We're here				We want to be here			1am	2am	3am	4am	5am	6am
	6pm	7pm	8pm	9pm	10pm	11pm	12am						
% businesses open	100%	97%	93%	79%	41%	31%	14%	14%	10%	10%	3%	3%	0%

This sub-precinct contains a number of well-established businesses that benefit from the spill-out of visitors moving between Burwood Station and Burwood Westfield. Restaurants and desert stores drive late night traffic and attract a regular audience to businesses. Westfield Burwood plays an important role as a source of consistent traffic, but can also have an expanded role as a late night destination itself.



## Future Night Time Sub-Precincts

Council recognises that there are a number of additional sub-precincts that currently have limited late night activity, but are likely to play a larger role in the future.

### Burwood North

Status: Growing (Increasing)

Burwood North will transition into a night time destination as new development occurs alongside the opening of Sydney Metro. This sub-precinct has an established retail offering that should be actively encouraged to open later to serve existing and future residents within the area.

### Commercial Hub

Status: Emerging (Increasing)

This sub-precinct has experienced recent urban renewal, which has allowed for new late night businesses to begin establishing themselves within the town centre. As additional development occurs, there will be further opportunities for population serving retail and hospitality stores to operate at night.

### Innovation Hub

Status: Emerging (Stable)

The Innovation Hub sub-precinct doesn't contain any existing late night businesses. It is anticipated this will change as urban renewal of key sites occurs, providing opportunities for ground floor activations. Population serving late night uses should be encouraged as this sub-precinct redevelops.

### Twilight Park

Status: Emerging (Stable)

Burwood Park is the sole land use within this sub-precinct. At night it serves as a local hangout space for residents after dark, with periodic large scale events. There is immense opportunity for further programming of this space to enable population serving uses, such as local sports and programmes.

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