PENRITH
NIGHT TIME ECONOMY

Study and Strategy
Final Report

Prepared by Urbis for Penrith City Council

PENRITH

urbis

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Template version 2015.1.0

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FIGURES

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1 Introduction

Penrith is a key regional centre offering a strategic role and community focus to a large catchment of residents, businesses, workers and visitors. It offers significant employment, recreational, cultural and educational opportunities. This is recognised in the metropolitan strategy for Sydney *A Plan for Growing Sydney* (see Figure 1), projecting significant future growth and opportunity for the City.

Penrith City Council is preparing for growth. This includes the development of a Late Night Economy that builds on current strengths and creates a diverse and vital offer that will meet the requirements of the current and future population.

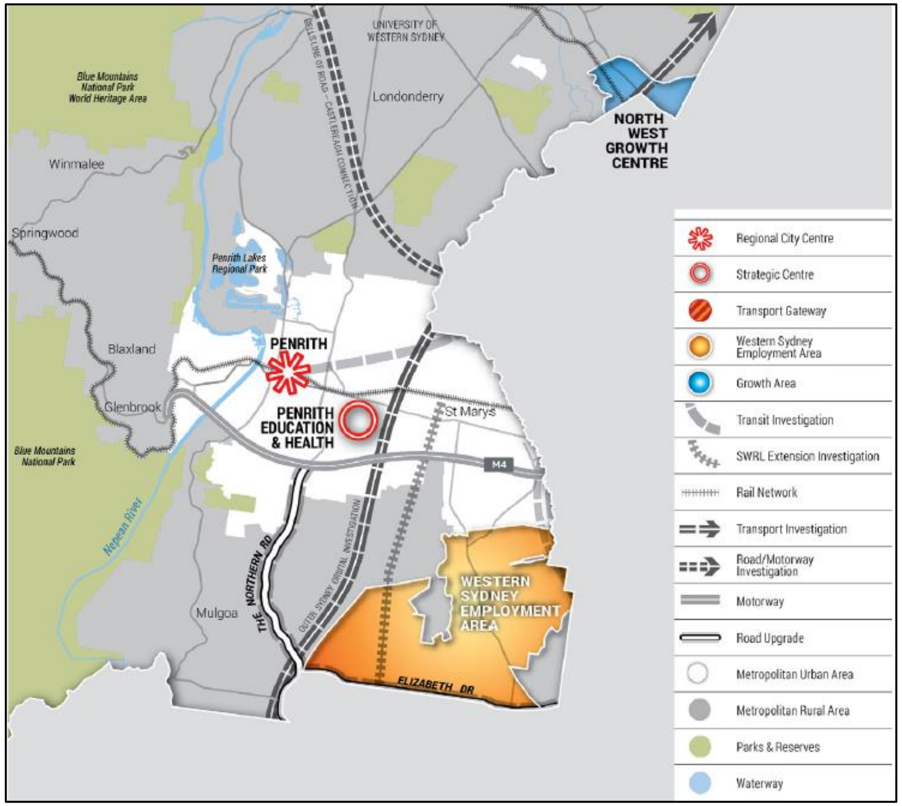
Council therefore commissioned a study to examine what a successful night time economy would look like for Penrith, and develop a strategy which will deliver and track outcomes.

The study aimed to:

- Understand the economic benefits and costs of a night time economy
- Define the strengths of the existing day and night time economy
- Review the existing situation for Penrith Regional City Centre with regards to existing night time activities
- Identify any impediments to creating a vibrant night time economy for Penrith Regional City Centre
- Examine the impact of an increase of city centre residents on the development of a night time economy.
- Prepare a detailed strategy that includes the identification of appropriate well researched baseline data.

The following map shows Penrith as part of the West Subregion from the Plan for Growing Sydney.

FIGURE 1 – WEST SUBREGION



Source: A Plan for Growing Sydney, NSW Government, 2014

2 This Strategy

This strategy was developed in three stages. Figure 2 outlines the approach to develop of the Strategy and Figure 3 outlines the key tasks undertaken. Appendix A provides further details.

FIGURE 2 – OVERVIEW OF METHOD TO DEVELOP PENRITH NIGHT TIME STRATEGY

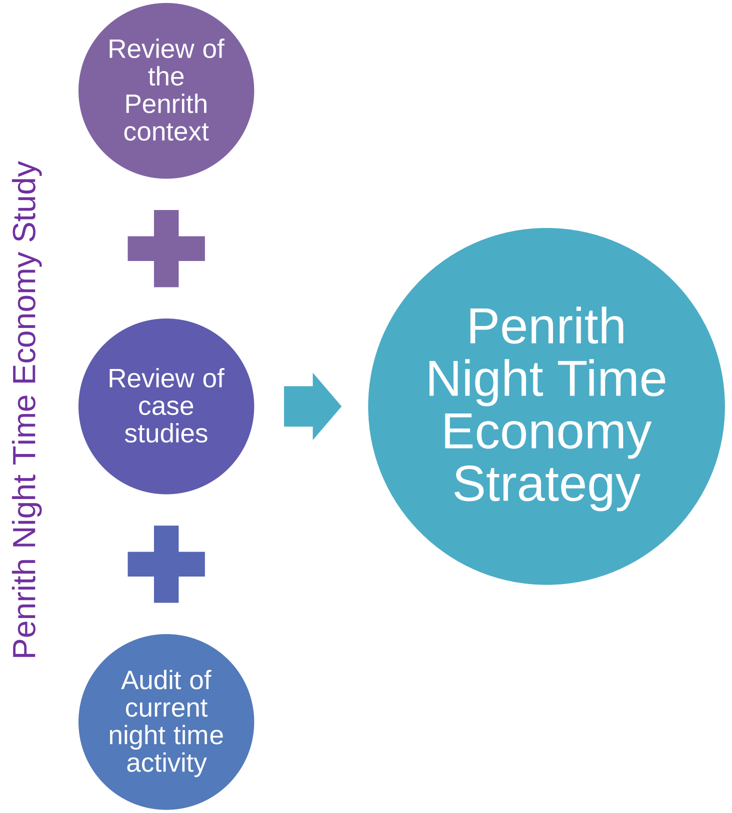


FIGURE 3 – METHOD AND KEY TASKS

3 Night Time Economies

WHAT IS A 'NIGHT TIME ECONOMY'?

While the precise definition remains a subject of debate, it is broadly accepted that the night time economy (NTE) is the range of "non-domestic activities" undertaken between 6pm and 6am.

The first conceptualisation of the NTE appeared in the early 1990s when cultural and urban theorists identified that town and city centres had unique qualities after dark. While these qualities did not entirely separate them from the 'day time', it was clear they produced distinct environments and raised issues different to those that drove city governance and management during the day.

Bevan and Turnham suggest that the NTE is driven by three key areas of business activity:

- food (e.g. cafes and restaurants);
- entertainment (e.g. clubs, sports and performing arts); and
- drink (e.g. pubs and bars).

Source: Bevan and Turnham, 2011

International and national research has identified the importance of the night time economy to other major cities including the City of Sydney, the City of Parramatta and the City of Melbourne. Research undertaken by the City of Sydney showed that businesses operating in the night time economy generated an estimated $15 billion in economic output and accounted for 28.4% of jobs in Sydney. Melbourne's night time economy is identified as a major factor in its status a world leading cultural city. In 2011 Parramatta's night time economy generated $760 million, 59% of which was generated by restaurants and cafes.

A literature review of night time economies around the world suggests:

- Night time economies are key features of attraction in major cities world wide
- Deregulation of liquor laws since the 1980s has led to increased night time activity in major cities in Australia
- Effective management of night time economies is a challenge in urban contexts
- Perceptions of antisocial behaviour and fear for personal safety are seen as a deterrent for potential patrons of the night time economy
- Mixed use areas help diversify night time activities, increasing the demographic range of participants and acting as a deterrent to antisocial behaviour
- Improved transport, well lit pedestrian access and better agency coordination have been used to manage some night time economies.

Further to the literature review, Appendix E presents case study research on the Night Time Economy in three distinct locations:

- Parramatta, Western Sydney, Australia
- Bendigo, Victoria, Australia
- Lexington, Kentucky, USA.

Key lessons from the case studies include:

- An integrated planning framework for day time and night time activity contributed to the successful re-vitalisation of the Lexington night time economy. This included public domain and streetscapes, as well as planning for commercial areas and residential areas
  - For Penrith, the development of the NTE Strategy should consider the wider strategic context for Penrith as well as locally targeted strategies which aim to improve the urban design or management of

the City Centre, including the Penrith Civic Improvement Plan and the Penrith City Centre Public Domain Masterplan (2013). The activities, actions and key focus areas for these strategies has been considered in the development of the strategy in Section 7

- The ability to attract a significant international event was a major catalyst for the revitalisation of the night time economy
  - Penrith City Centre is in close proximity to key regional, national, and internationally significant assets including sports and recreation assets such as Penrith Panthers, the Sydney International Regatta Centre, Penrith Indoor Sports and Recreation Centre, and acts as a gateway to the Blue Mountains National Park. These assets draw a large number of visitors each year, and host regular events. The NTE Strategy must seek to build on the strengths of these assets, and ensure measures are in place to enable identification of events which may support activation of the NTE, and ensure these opportunities can be realised by the NTE businesses in the City. In order to service large scale events, it is important that the NTE is of sufficient capacity, and sufficiently managed to support regular local events.
- Expansion of enrolment in tertiary institutions and their proximity to the downtown area has contributed to a younger demographic becoming patron of downtown areas
  - Penrith also benefits from proximity of Nepean College Campus, as well as the University of Western Sydney Kingswood campus. These can be major drivers to growth of the NTE in the City Centre. However this must be balanced with the needs of incoming residents, with residential growth also playing a significant role in Penrith. A diverse NTE can attract and cater for a range of patrons, and also help to normalise the city at night and reduce opportunities for anti-social behaviour
- A walkable city is seen as central to the success of revitalisation of the downtown district
  - Improvements to pedestrian access, and feelings of safety when walking through the city at night are key to activate the city, and encourage patrons to explore the city at night.

Overall, the literature and case studies reiterate that night time economies are defined by place and context, activity and aspirations. As those factors are unique to a place, no two NTEs can or should be the same. It is critical that Penrith’s NTE reflects the values and strengths of place and context.

4 Penrith City Context

The following provides a snapshot of the Penrith City context. A more detailed overview – including a full community profile, detailed crime statistics and economic data – is available at Appendix B.

4.1 STRATEGIC CONTEXT

Council's vision for Penrith is for dynamic regional City, which continues to prosper, while maintaining connections to safe vibrant places and surrounding natural areas.[1] *A Plan for Growing Sydney* has identified Penrith as a strategic centre, recognising its important role in delivering the NSW Government's vision for growth in Western Sydney. 'Growth' will include jobs and housing, as well increased access to facilities and activities for education, health, arts, culture, recreation and entertainment. Penrith Progression describes Penrith as a "vital hub", the "New West" and a "place of limitless opportunities".[2]

These visions for Penrith are supported by key directions identified recently, including:

- Build on the strengths of Penrith's current $7.24 billion economy[3]
- Adopt fresh ideas, projects and partnerships to help the City prosper[4]
- Retain a commercial core in Penrith to support employment growth[5]
- Encourage mixed-used developments[6]
- Facilitate 'inner city living', including a vibrant night time economy[7]

1 Penrith Community Plan, Penrith City Council, 2013
2 A Plan for Action, Penrith Progression, 2015
3 A Plan for Action, Penrith Progression, 2015
4 Penrith City Centre Vision, Regional Cities Taskforce, 2007
5 A Plan for Growing Sydney, NSW Government, 2014
6 A Plan for Growing Sydney, NSW Government, 2014

- Make business in the City Centre easy[8]
- Identify co-investment proposals for cultural infrastructure[9]
- Connect the Nepean River to the City Centre[10]
- Improve walking and cycling accessibility[11]
- Create better transport connections between Penrith and other strategic centres across Sydney[12]

Penrith has a number of key assets and strengths. Those include:

- A regional centre catering to the service, cultural and entertainment needs of a large proportion of Western Sydney, including the Blue Mountains
- Educational assets – Nepean College Campus and UWS's Penrith campuses at Werrington and Kingswood, which have an increasing student population
- Cultural assets – Penrith City Library and the Joan Sutherland Performing Arts Centre, which offers a range of live shows, as well as being an important facility for school performances and events
- Health assets – a major teaching hospital (Nepean Hospital)
- Westfield shopping mall, which is supported by a mix of eateries on Riley Street that help integrate Westfield with the rest of the City Centre
- Regionally significant commercial offices (including the NSW tax office)

7 A Plan for Action, Penrith Progression, 2015
8 Penrith City Centre Vision, Regional Cities Taskforce, 2007
9 A Plan for Growing Sydney, NSW Government, 2014
10 Penrith City Centre Vision, Regional Cities Taskforce, 2007
11 Penrith City Centre Vision, Regional Cities Taskforce, 2007
12 A Plan for Growing Sydney, NSW Government, 2014

- A traditional high street that is home to a variety of businesses, including cafes, eateries, pubs, clubs, clothing stores, mixed use arcades, pharmacies, variety shops, hairdressers, community services and banks

- The diverse urban landscape – appreciating the potential opportunities related to the different precincts within the city and the unique built environment. Including opportunities associated with public plazas, strip shopping, and arcades

- Existing access arrangements – including abundant car parking and public transport access

- Potential for growth – both in terms of increasing populations within the city, and also opportunities generated through major developments.

The following sections provide an overview of the demographic and NTE characteristics in Penrith and identifies key drivers for the NTE including population growth, and development drivers.

4.2 CURRENT DEMOGRAPHIC PROFILE

In 2011 the suburb of Penrith (including the city centre) had a population of 11,808[13], equivalent to 7% of the LGA population. The following provides an overview of key characteristics of the residential population in the Penrith suburb:

- The average age (39years) is older compared to the LGA and Greater Sydney area (35 years and 37 years respectively)

- A relatively high proportion of residents are aged 65+ years (17%)

- A large proportion of residents were born in Australia (77%)

- Two fifths of residents live in lone person households (43%)

- A large proportion of residents are renters (51%) compared to Penrith LGA and Greater Sydney (27% and 32% respectively)

- Over a third (35%) of Penrith residents are blue collar workers

- One in eight (12%) of Penrith residents have a Bachelor Degree, compared to one quarter (24%) in Greater Sydney

- The average household income in Penrith is $62,539 compared to $85,548 in Penrith LGA and $94,428 in Greater Sydney.

4.3 POPULATION GROWTH

Since 2011 it is estimated that the population living within Penrith suburb has increased to 13,036 (+10%).[14]

Over the next 16 years (to 2031) the population of the entire Penrith LGA will increase by 21%, with growth concentrated in key areas including the St Marys and Cadens Release Areas which combined will bring close to 13,000 new residents to the LGA by 2031. Penrith suburb will see a 37% increase in residents by 2031, equivalent to an additional 4,500 people. Figure 4 below presents population projections for key population growth areas in Penrith.

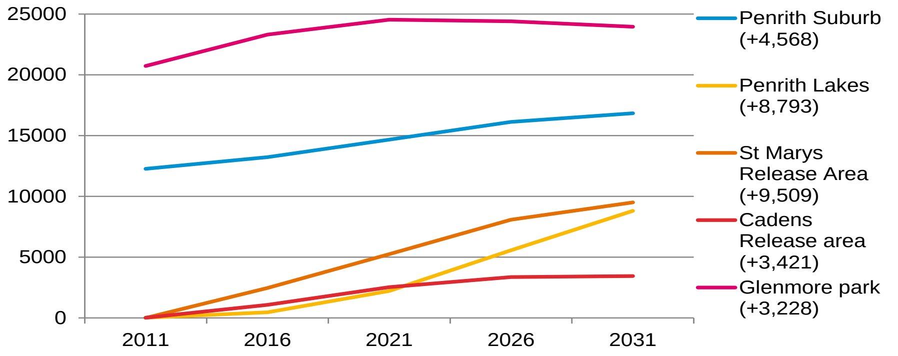
In terms of growth by age breakdown, the strongest growth in Penrith LGA overall will be seen in the older professional age group (30-44 years of age) with an additional 8,826 residents by 2031.

It is anticipated that Penrith suburb will see strong growth in the number of young professionals (20-34 years of age) residing in the city, with an additional 1,472 residents by 2031. The suburb is also expected to observed large increases in the number of residents over the age of 65 years (+915).

13 ABS Census, 2011

14 Forecast .id, 2015

FIGURE 4 – POPULATION GROWTH IN KEY GROWTH AREAS



4.4 DEVELOPMENT DRIVERS

Penrith LGA is characterised by predominantly rural-residential land (80%), and has seen the delivery of a significant proportion of Sydney's new housing over the past 40 years. This pattern of 'greenfield' development is expected to continue over the next 20 years, with several large release areas identified for urban development in the LGA – including in Caddens, St Marys, Claremont Meadows, Penrith Lakes, Glenmore Park, Kingswood, Werrington and Jordan Springs.[15]

Penrith City Centre is also expected to experience an increase in dwellings and population density. The City Centre has significant in-fill opportunities – being a regional city centre with a significant transport hub. Penrith Progression has identified a growth target of 10,000 people and 10,000 jobs in the City Centre. Council is encouraging mixed use developments, to improve vibrancy and increase employment opportunities in the City Centre.

A review of current development proposals within Penrith LGA is provided in Table 1 and indicates several significant projects in the pipeline.

TABLE 1 – RECENTLY APPROVED MULTI-UNIT DEVELOPMENT

PROJECT	DETAILS
St Hillier's Thornton	190 units
Kingswood mixed-use	8 storeys, 197 units
Kings wood residential	8 storeys, 158 units
Panthers Seniors living	127 ILUs, 126 bed residential care facility
Barber Street, Penrith	52 apartments
Lord Sheffield Ct, Thornton	9 storeys, 151 units, 151 affordable housing units
Jordan Springs	138 units
Phillip Street, St Marys	49 units
Great W Hwy, St Marys	53 units
Carson Lane, St Marys	289 units
South Penrith residential	28 units
Panasonic site	570 units in stage 1 of 5, recent purchased by SHMH
Riverside Restaurant	$5.8 m riverside dining, recreation and entertainment

Source: City of Penrith, 2015

A review of recent master planning projects indicates that the LGA is also likely to undergo broader transformation. Many of these projects reflect Penrith Progression's aims to make Penrith a tourism and medical research destination. Key master planning projects include:

[15] Profile id

TABLE 2 – RECENT MASTERPLANNING PROJECTS – PENRITH LGA

PROJECT	DETAILS
Sydney Science Park	▪ 340,000 sqm of research and development floor area ▪ 100,000 sqm of education floor area and student accommodation ▪ a Town Centre comprising up to 30,000 sqm of retail space ▪ 3,400 dwellings
Werrington Corporate Park	▪ Opened 16 April 2015 ▪ UWS 5-star green rating ▪ First step in developing a 58ha Business Park Precinct to bring 6,000 jobs over 20 years
Our River Masterplan	▪ Future directions for protection of the river and connection to Penrith City Centre ▪ Grant received in April 2015 ($187,500) for Our River Precinct to improve access and facilities ▪ Regatta Park precinct planning
Penrith Civic Heart	▪ Redevelopment of the Allen Place car park into a new "civic heart" park ▪ Potential development options currently being investigated

Source: City of Penrith, 2015

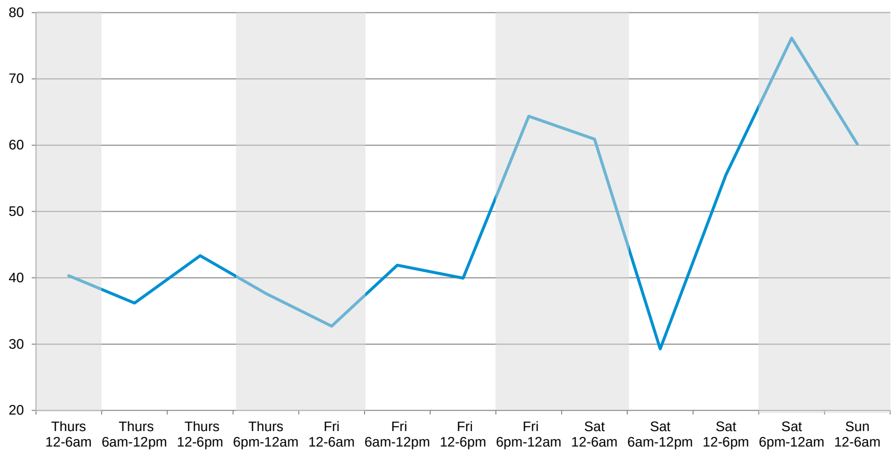
4.5 ANTI-SOCIAL BEHAVIOUR

In many cities, the NTE can experience issues associated with anti-social behaviour, therefore it is important to consider any existing anti-social issues in Penrith. This does not appear to be a current issue in the Penrith City Centre beyond what would be expected in any other urban centre. The opportunity for the NTE is to activate the City and encourage positive community interaction and enjoyment.

NSW Bureau of Crime Statistics (BOCSAR) data indicates that rates of crime are generally higher in Penrith LGA compared with NSW as a whole. The most common type of crime in the City was malicious damage to property and stealing from a motor vehicle. Also, most of the city, including along High Street, was identified as a hotspot for malicious damage to property, while Westfield was a hotspot for robbery incidents.

Figure 5 presents the timing for all major reported crime incidents in Penrith LGA, and indicates that most crime in occurred between 6pm-12am on Saturday, followed by Friday 6pm-12am.

FIGURE 5 – TIMING OF ALL MAJOR CRIME INCIDENTS IN 2015



Alcohol related crime was identified as a small proportion of all crimes recorded.

In summary this indicates that across the Penrith LGA:

- Crime rates are slightly higher compared with the NSW average, however this is expected as Penrith has a denser population compared to remote areas and therefore likely to experience more incidents
- The main crime issues are related to property or vehicles, which may be a result of urban design features of the City (eg poor passive surveillance) and result in security measures in the City (eg. Shutter doors) which create an unwelcoming atmosphere at night
- Also, most crime occurred at night on Friday or Saturday nights – the key NTE opportunity times. It is anticipated that activation of the city may be a key driver to mitigating these issues as they generally relate to opportunistic crime to property or vehicles not to people

- Alcohol related crime was low, but most commonly associated with the NTE during the weekend.
- The development of a diverse and active NTE can help to mitigate against anti-social, alcohol related behaviours.

Further detail is provided in Appendix B.

4.6 ECONOMIC CONTEXT

Penrith is an economically important Regional Centre within the Sydney metropolitan area due to its strategic location with good access to transport infrastructure (Rail and M4 motorway), major industrial zones, high order education and health services, large commercial centre, and large residential development opportunities.

Penrith generates $7.61 billion in Gross Regional Product (GRP), equivalent to 1.6% of the NSW Gross State Product, and supports 12,424 local businesses and 70,443 jobs. Key business sectors include construction, which accounts for 24% of all businesses. While the main employment sectors include Health Care and Social Assistance services (14%).

In terms of the sectors which typically characterise the Night Time Economy, Penrith has large number of jobs in retail (9,500), accommodation food and beverage (5,500) and art and culture (1,165). Penrith generated a greater number of jobs (5,250) and revenue ($223million) from food and beverage services compared to Parramatta LGA (3,694 and $56million). In terms of consumer spending, market information suggests that spending on take away food ($803) is higher than spending on cafes and restaurant dining ($712) and spend on take home liquor ($600) was higher compared to on premises liquor ($291).

It should be noted that this data is for the entire Penrith LGA and not just the Penrith City centre, and there are a number of large economic drivers in other areas of the LGA. Therefore the relative value of the NTE in the City may only be inferred from the data.

4.7 IMPLICATIONS

This section presents the following implications for the development of the NTE Strategy for Penrith:

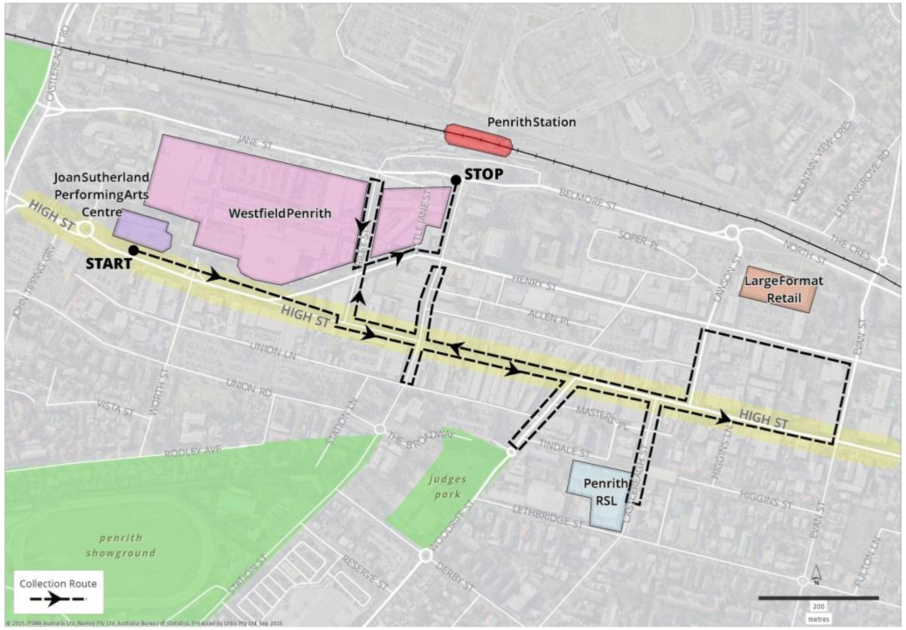
- There are a number of strategic stakeholders and partners who can work together to support the development of the NTE in the City (Penrith City Council, Penrith Progression, and Penrith CBD Corporation)
- Penrith is strategically located to support growth and is identified as a “vital hub” and key opportunity area
- The City has a number of key educational, cultural, health and commercial assets which it can leverage off to develop a regionally significant NTE
- The population in the City is growing, and growth is expected to increase demand for NTE activities and creates an opportunity to increase activity in the city at night
- Anti-social behaviour in the City at night is limited and activation of the NTE will help to manage the potential for any crime and safety issues.

5 The Night Time Economy in Penrith

An audit of the night time economy in Penrith was undertaken to assess the current NTE context, identify strengths and provide a baseline for future assessment. The audit looked at business type and activity, street activity and anti-social behaviour. This audit did not include activity associated with internal Westfield businesses and was focused primarily on the City Centre main streets, and only ground floor activity was observed.

The audit was undertaken on a Thursday and Saturday night between 6pm-9pm in July and on a Friday night between 9pm-12am in August. Undertaking such a study in winter provides the opportunity to observe the typical activity in the City without the summer peaks. Figure 6 below presents the survey audit route. Details on full methodology are available at Appendix A, while maps presenting the results of the Audit are presented in Appendix C.

FIGURE 6 – PENRITH NTE SURVEY AUIDT ROUTE



5.1 BUSINESS ACTIVITY

Figure 7 presents the proportion of all businesses open or closed and Figure 8 presents the number and type of businesses open. Table 3 overleaf provides a summary of the data.

Observations included:

- 220 businesses were counted in the study area
- Of these two fifths (40%) were retail businesses, a fifth (21%) were food and drink related, and one in ten (11%) were commercial
- On Thursday less than half (49%) of all businesses were open, less than one third (29%) were open on Saturday, and one in six (16%) were open on Friday – however this was later in the night
- Of those businesses that were open, most were food and drink establishments, followed by retail premises
- Food and drink premises comprised 39% of open trade on Thursday, 81% on Friday, and 64% on Saturday
- Thursday observed the most diverse NTE with large proportions of other businesses open – including 36% retail and 13% mixed arcade trade.

FIGURE 7 – PROPORTION OF BUSINESSES OPEN DURING AUDIT (N=220)

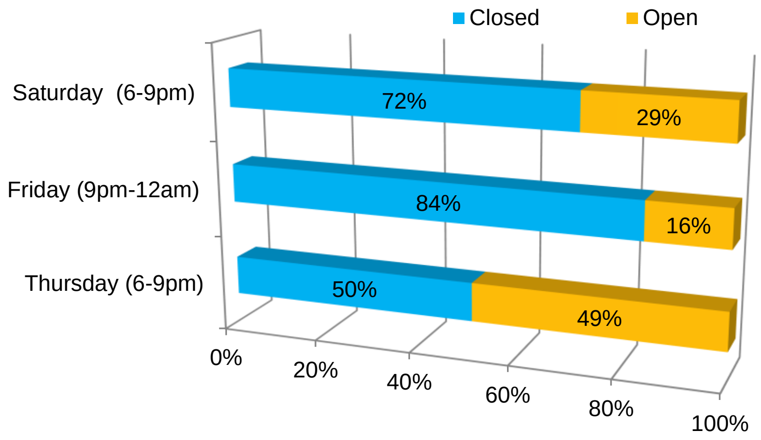


FIGURE 8 – NUMBER AND TYPE OF BUSINESSES OPEN DURING THE AUDIT

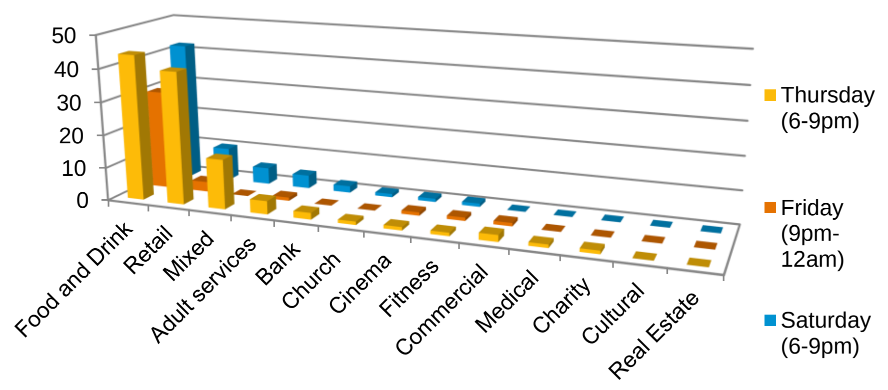


TABLE 3 – BUSINESS TYPES SUMMARY

BUSINESS TYPE	TOTAL		THURSDAY OPEN		FRIDAY OPEN		SATURDAY OPEN	
	NO.	%	NO.	%	NO.	%	NO.	%
Cultural	1	0%	0	0%	0	0%	0	0%
Retail	89	40%	40	36%	3	8%	8	14%
Commercial	25	11%	2	2%	1	3%	0	0%
Food and Drink	47	21%	44	39%	30	81%	38	64%
Adult	4	2%	4	4%	1	3%	4	7%
Mixed Arcade	15	7%	15	13%	0	0%	4	7%
Vacant	11	5%	0	0%	0	0%	0	0%
Real Estate	3	1%	0	0%	0	0%	0	0%
Bank	8	4%	2	2%	0	0%	2	3%
Medical	10	5%	1	1%	0	0%	0	0%
Charity	4	2%	1	1%	0	0%	0	0%
Church	1	0%	1	1%	0	0%	1	2%
Cinema	1	0%	1	1%	1	3%	1	2%
Fitness	1	0%	1	1%	1	3%	1	2%
Closed	-	-	115	-	193	-	164	-
Total	**220**	**100%**	**112**	**100%**	**37**	**100%**	**59**	**100%**

Additional observations regarding lighting and security features included:

- Over half (54%) of closed businesses had some lights on, either indoor or under awning
- Over a third (36%) of closed businesses had metal shutters pulled down over the shop frontage
- One third (30%) of premises had a clear alarm system
- One sixth (16%) had a clear CCTV system.

5.2 PATRON ACTIVITY

Figure 9 presents the number of patrons recorded by establishment type for each night. Table 4 provides a summary of the data.

Observations included:

- Saturday was the busiest evening with over 1,400 patrons recorded inside business premises, followed by Thursday (1,225 patrons)
- Friday was the quietest evening with just 31 patrons recorded, however it should be noted that the audit on Friday was taken at a later time (9pm-12am)
- Most patrons were visiting food and drink establishments, which includes restaurants, take-away food shops, clubs and pubs.

FIGURE 9 – PARTON ACTIVITY BY VENUE

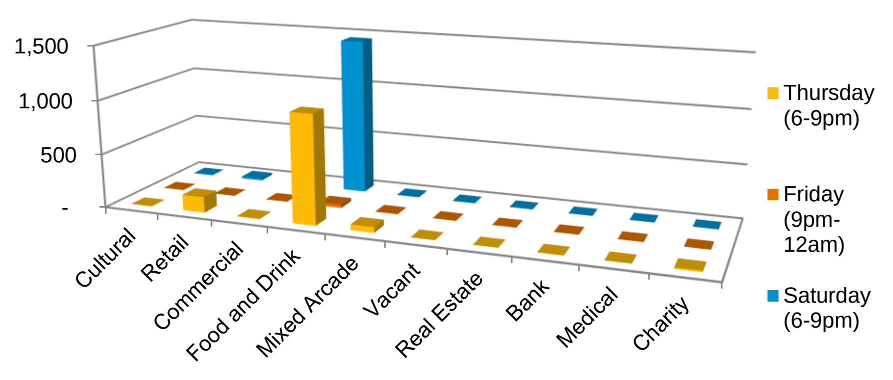


TABLE 4 – PATRON ACTIVITY BY VENUE

BUSINESS TYPE	THURSDAY		FRIDAY		SATURDAY	
	NO.	%	NO.	%	NO.	%
Cultural	0	0%	0	0%	0	0%
Retail	146	12%	0	0%	20	1%
Commercial	5	0%	0	0%	0	0%
Food and Drink	1,006	82%	31	100%	1,450	98%
Mixed Arcade	52	4%	0	0%	3	0%
Vacant	0	0%	0	0%	0	0%
Real Estate	0	0%	0	0%	0	0%
Bank	2	0%	0	0%	0	0%
Medical	2	0%	0	0%	0	0%
Charity	12	1%	0	0%	0	0%
Total	**1,225**	**100%**	**31**	**100%**	**1,473**	**100%**

5.3 OBSERVATIONS

The audit has highlighted the following implications for Penrith's NTE:

- Penrith City Centre already has a NTE – largely led by food and beverage businesses
- There are key areas of activity – the most active area is the Riley Street restaurant precinct
- Along the High Street open businesses are dispersed – with empty pockets of inactivity where groups of businesses are closed or vacant
- There is a small incidence of anti-social behaviour later in the night – however this comprises non-serious incidents such as horsing about and making noise.

There are several street activity and urban design issues which may contribute to negative perceptions about personal safety in Penrith at night. These include:

- Large at-grade car parking located on the periphery of the Centre with dim lighting
- Connections to the car parks are via arcades, with most businesses shut after 6pm and most arcades closed with shutters up at 9pm
- Lack of street activity on High Street when retail shuts – contribution to the feeling that Penrith is a "ghost town" in the evenings
- Lack of lighting on High Street when businesses turn off their lights
- Prominence of roller shutters and locks when businesses shut
- Many empty urban spaces, such as the High Street pocket parks and the area outside the Joan.

5.4 IMPLICATIONS

There are a number of strengths of the existing NTE in Penrith which can be built on and supported to expand activity across the City. They include:

- Limited ASB or issues associated with alcohol related violence. Current crime issues are related to lack of activity in the precinct. A vibrant NTE could help to reduce crime issues
- Proximity to large, active venues which attract patrons from a regional catchment, such as the Panthers, RSL, Westfield, Joan Sutherland Centre
- Good connectivity to train, and plentiful car parking to support visitors to the NTE
- Existing NTE activity hubs, especially along Riley Street, and large number of patrons at certain times
- Unique urban design features, such as the public plazas at the end of High Street, and Woodriff Street, and the arcades.

6 Aspirations for a Future NTE in Penrith

Night time economies are specifically influenced by the requirements of community, context and place. These aspects were explored in a series of discussions and workshops with local businesses, business and community representatives and Council officers, to form a sense of a desired vision and aspirations for a Night Time Economy in Penrith.

These discussions further informed the development of strategies and actions for implementation.

WHY IS A NTE IMPORTANT?

Stakeholders believe that a NTE is important because Penrith Regional City Centre will grow substantially over the coming years. New city centre residential development will create demand for night time businesses in close proximity to where people live.

WHAT DOES IT LOOK LIKE NOW?

Stakeholders characterise Penrith's current NTE in the following ways:

- Activity is currently concentrated around Riley Street, the Australian Arms Hotel and Memory Park (due to 24hr Pharmacy, late night take aways and adult premises in this area)
- Other areas of activity include the Tattersall's, The Red Cow and the RSL
- Divided patronage between a foot-traffic precinct (Westfield and Riley Street eateries) and a destination precinct (range of dispersed and diverse restaurants on High Street)
- A perception that Penrith is a "ghost town" outside normal business hours
- A perception that Penrith is not a place you would go to for "fine dining" and is "full of bogans"
- A perception that Penrith is a dangerous place after dark. Urban amenity and design issues create an "unwelcome" feeling in some areas including the arcades (where most businesses are closed) and the at-grade car parks (with have dim lighting and no security presence)
- Crime is relatively limited but there are some community safety issues later in the evening including property damage (hence the high incidence of roller shutters) and drunken behaviour
- The summer NTE experience is different, there is more activity in summer than in winter.

WHAT DO PEOPLE WANT IT TO LOOK LIKE?

Penrith's future NTE should include:

- Activity in the later afternoon, early evening and after dinner
- A diversity of uses and attractions ("not just nightclubs", "more refined drinking options", "more intimate opportunities")
- A family friendly destination at night
- Businesses that can transition from day to night (e.g. cafes with liquor licenses)
- A safe public domain through urban design improvements, better lighting, greater street activation
- A creative public domain through the establishment of small scale street art and creative lighting
- An integrated centre better connections through the integration of off-street parking with future land uses, improved wayfinding and connections between Riley Street and High Street
- Activation of the arcades to create interesting places to visit and walk through ("like Melbourne has done with its arcades and laneways")

- Activation of the Joan Sutherland Performing Arts Centre an leverage from activity generated by this important multi-faceted cultural facility
- A City of outdoor events focussed on bringing the region (including the Blue Mountains) to the Centre to enjoy trade fairs, food markets and outdoor concerts and displays
- Precincts of specialisation, building on current specialisations in health and wellness businesses and online trading businesses requiring shop fronts
- Local business entrepreneurs are supported through special arrangements to encourage creative business ideas and support diverse uses in strategic precincts

WHAT ARE THE BARRIERS TO OVERCOME?

The following were identified as barriers to consider in developing the future night time economy:

- There is a current lack of knowledge about demand. Do people want to go out at night? Where are they currently going? Where do they want to go? What do they want to do?
- Cost associated with urban amenity upgrades
- The length and narrowness of High Street discourages “foot traffic” and browsing, kerbside dining opportunities are limited
- People perceive that free all-day off-street parking and unrestricted kerbside parking is vital to the financial viability of businesses in Penrith, but perhaps this is not the case
- A lull in activity between 3pm-6pm as cafes close and restaurants are not yet open
- Strong competition from other destinations in the region including Glenbrook, Springwood and Penrith Panthers
- The City Centre is dominated by small individually owned lots, some site consolidation needs to take place to achieve a more integrated and effective NTE.

7 The Penrith City Night Time Economy Strategy

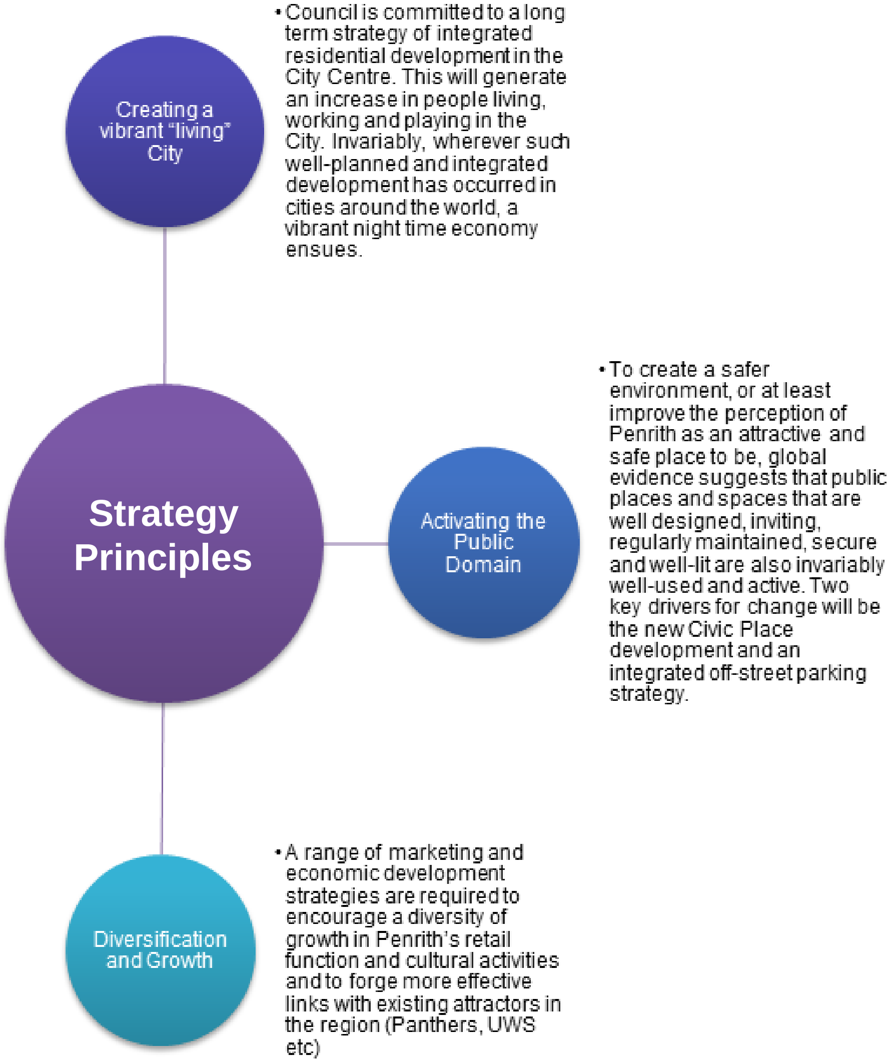
7.1 STRATEGY VISION

The vision from key stakeholders is for a night time economy which is safe, diverse and busy. This vision has informed the development of the Penrith NTE strategy.

7.2 STRATEGY PRINCIPLES

This strategy aims to:

- Build on Penrith's current strengths:
  - The diverse business base – including the range of retail, commercial, food and beverage outlets, including banks, clothes shops, estate agents, gymnasiums
  - The civic and cultural assets – such as the Joan Sutherland Performing Arts Centre, Penrith City Council chambers, Penrith City Library and the Nepean College campus
  - Existing nigh time economy – The popular restaurant and dining areas, take away food shops, and well established licensed premises
  - Significant leisure and recreation assets – Including the Penrith Panthers, Penrith RSL, and Joan Sutherland Centre, which attract a large number of patrons from a regional catchment to Penrith regularly
  - The diverse urban landscape – appreciating the potential opportunities related to the different precincts within the city and the unique built environment. Including opportunities associated with public plazas, strip shopping, and arcades
  - Existing access arrangements – including abundant car parking and public transport access
  - Potential for growth – both in terms of increasing populations within the city, and also opportunities generated through major developments
- Change perceptions: Penrith is active!
- Create an environment to support diverse range of activities and attractions
- Become a living City with an integral NTE
- Create more opportunities for growth



7.3 STRATEGY DIRECTIONS AND ACTIONS

The following sections present the key strategy directions and key actions for Council and stakeholders to support the development of a safe, diverse, and busy NTE in Penrith.

Key roles and responsibilities, as well as timeframes and indicators for success are also identified.

Section 7.4 identifies a number of Priority Precincts across the City which could be focused on to leverage existing activity and develop additional capacity to grow the NTE in Penrith.

PENRITH NIGHT TIME ECONOMY STRATEGY AND ACTIONS
1. COLLABORATION
1.1 Collaborate with all stakeholders to improve the NTE
1.2 Pilot improvement programs with the PCBDC for targeted precincts or business types
2. PUBLIC DOMAIN LIGHTING
2.1 Review the existing public domain lighting policy and consider options to improve lighting on footpaths and public spaces
2.2 Develop and implement a Lighting Improvement Plan for the centre that complements wayfinding and CCTV improvements
2.3 Develop and implement a Shopfront Display Lighting Program
3. PUBLIC DOMAIN SAFETY AND AMENITY
3.1 Review CCTV policy and implement as opportunities arise
3.2 Collaborate with all stakeholders to improve and maintain night time safety
3.3 Review current DCP controls for roller door / shutter installation
3.4 Review night time bus stop, way finding, and lighting design standards for inclusion in the Penrith Public domain Manual and implement as opportunities arise
4. PUBLIC DOMAIN INFRASTRUCTURE
4.1 Upgrade public footpaths and spaces in accordance with the Penrith Streetscape Improvement Masterplan
5. WAYFINDING
5.1 Review pedestrian access routes available during the Night Time
5.2 Prepare and implement a Wayfinding Plan which aims to link night time precincts, public transport and parking areas
6. MARKETING AND PROMOTION
6.1 Prepare a Marketing Plan to create a night time brand identity and market Penrith to the region

7.	**EVENTS AND ENTERTAINMENT PROGRAM**
7.1	Review the range of existing events taking place in the NTE, including those hosted at key assets (JSC, Panthers, RSL and Westfield)
7.2	Incorporate night time events and entertainment into the Annual Events calendar of Council and the PCBDC.
7.3	Support quality public street performers at night
7.4	Create an events plan which aims to activate the NTE.
8.	**ARCADE TRADE**
8.1	Work with arcade owners to improve amenity, identify and safety of the arcades
8.2	Work with arcade businesses to promote late opening hours
8.3	Work with owners and businesses on the potential to promote a trial on themed uses in arcades
9.	**CULTURAL / CIVIC PRECINCT**
9.1	Work with JSC to support late night activity prior and post events
9.2	Work with stakeholders, including JSC, Westfield, and Council to consider re-design and reconstruction of the precinct to support evening outdoor dining and events
9.3	Investigate integrating library programming with evening activation of the precinct
10.	**MONITOR**
10.1	Develop an annual NTE Monitoring Plan to assess the levels of activity, key issues, barriers and potential opportunities for the city at night
10.2	Undertake biennial audit of the NTE
10.3	Update the NTE Strategy every 5-years.

PENRITH NIGHT TIME ECONOMY STRATEGY AND ACTIONS					
STRATEGY	ACTIONS	RATIONALE	RESPONSIBILITIES	TIMEFRAME	INDICATORS
1. Collaboration	1.1 Collaborate with all stakeholders to improve the NTE 1.2 Pilot improvement programs with the PCBDC for targeted precincts of business types	▪ Collaboration with all stakeholders can help to identify issues and barriers to the NTE, opportunities and activities to maximise and grow the NTE, and support Council in the management of the NTE, and coordinate activities across the city.	Council: ▪ Setup and coordination ▪ Standing agenda ▪ Invitations PCBDC: ▪ Attendance and inputs	Short Term – Q4 2015	▪ Pilot projects implemented with PCBDC.
2. Public domain lighting	2.1 Review the existing public domain lighting policy and consider options to improve lighting on footpaths and public spaces 2.2 Develop and implement a Lighting Improvement Plan for the centre that complements wayfinding and CCTV improvements 2.3 Develop a Shopfront Display Lighting Program and work with local businesses to improve lighting.	▪ Lighting can help to activate areas and improve integration between precincts. It can also be an attractor in itself (eg. light shows) ▪ Lighting can improve perceptions of safety and help to minimise opportunities for crime ▪ Aligns with City Centre Public Domain Masterplan	Council: ▪ Review lighting policy, develop Special Places Program PCBDC: ▪ Shopfront Display Lighting Program All: ▪ Implementation of strategies	Short term - Review and policy development Medium term – Implementation	▪ Special Places Lighting Program adopted ▪ Shopfront Display Lighting Program adopted ▪ Existing public domain lighting improved in key areas (eg. Memorial Park) ▪ Increase of shopfront lighting and under awning lighting at night (currently 54%) along High Street
3. Public domain safety and amenity	3.1 Review CCTV policy and implement as opportunities arise 3.2 Collaborate with all stakeholders to improve and maintain night time safety 3.3 Review current DCP controls for roller door / shutter installation 3.4 Review night time bus stop, way finding, and lighting design standards for inclusion in the Penrith Public domain Manual and implement as opportunities arise	▪ Public domain improvements, passive and active surveillance, and activation of the city can help to reduce the opportunities for crime and reinforce feelings of safety ▪ Current fear of property damage has resulted in increased number of roller door shutters which create an unwelcoming environment and diminish amenity for pedestrians (eg. window browsing etc).	Council: ▪ Review of DCP and CCTV policy ▪ Coordinated activity with stakeholders Police: ▪ Review of CCTV All: ▪ Implementation	Short term – Review of policies Medium term – Implementation	▪ Reduction in proportion of shopfronts with roller door shutters down of an evening (currently 36%) along High Street ▪ Improved perceptions of safety ▪ Reduced rates of reported damage to property.
4. Public Domain Infrastructure	4.1 Upgrade public footpaths and spaces in accordance with the Penrith Streetscape Improvement Masterplan	▪ Improvements to the physical environment encourage people and businesses to use it at night	Council, PCBDC	Stage I construction during 2016-17	Construction of Stage I completed

PENRITH NIGHT TIME ECONOMY STRATEGY AND ACTIONS					
STRATEGY	ACTIONS	RATIONALE	RESPONSIBILITIES	TIMEFRAME	INDICATORS
5. Wayfinding	5.1 Review pedestrian access routes available during the Night Time 5.2 Prepare and implement a Wayfinding Plan which aims to link night time precincts, public transport and parking areas.	▪ Greater movement through precincts improves perceptions of safety, reduces opportunities for crime, and activates the city at night ▪ Adequate Wayfinding can signpost activity in other areas and lead patrons to areas and activity they may not be aware of ▪ There is currently limited pedestrian movement between precincts as pedestrian access is restricted (eg. closed arcades or poor lighting). Many patrons drive to, and park near, one destination in the city without moving through the precincts.	Council: ▪ Review, develop, and implement strategy.	Short term – Develop and implement Wayfining Plan.	Signage installed that: ▪ identifies each NTE precinct ▪ guides pedestrians between different NTE precincts.
6. Marketing and promotion	6.1 Prepare a Marketing Plan to create a night time brand identity and market Penrith to the region	▪ Marketing and promotion can attract people to the city at night by: – Tackling any negative perceptions – Inform patrons of what is on across the city and how to access activities – Can be targeted to specific groups – Attract people who may not have visited otherwise ▪ The Plan should: – Creates a brand identity for Penrith's NTE (eg. "Play Melbourne") and each of the distinct NTE Precincts – Outlines marketing activities to promote Penrith's NTE to the region – Identifies targeted promotion activity.	Council: ▪ Implement and feed into the process PCBDC: ▪ Lead the process and implementation of the strategy.	Short term – Development of brand identity and development of marketing plan Medium term - Implementation	Marketing collateral released promoting Penrith's NTE, NTE Precincts, and NTE activities to a local, regional, and state wide audience.

PENRITH NIGHT TIME ECONOMY STRATEGY AND ACTIONS					
STRATEGY	ACTIONS	RATIONALE	RESPONSIBILITIES	TIMEFRAME	INDICATORS
7. Events and Entertainment program	7.1 Review the range of existing events taking place in the NTE, including those hosted at key assets (JSC, Panthers, RSL and Westfield) 7.2 Incorporate night time events and entertainment into the Annual Events calendar of Council and the PCBDC 7.3 Support quality public street performers at night 7.4 Create an events plan which aims to activate the NTE.	▪ Events can attract diverse range of patrons, and be targeted to specific groups ▪ Events can be diverse including food and drink events (eg. street food, fresh food, or farmers markets), retail led (eg. craft fairs or exhibitions) or performance based (eg. concerts, festivals, or theatre shows) ▪ A clear events calendar throughout the year will support businesses to develop a case for operating in the night	Council: ▪ Review existing events and develop Council led events to activate the NTE PCBDC: ▪ Coordinate events Businesses: ▪ Support events	Short term – Review of events and development of events calendar Medium term – implement diverse range of events to activate NTE	Short term – One NTE event per month within the city Medium term – One regular NTE event per month, in the categories of food and drink, retail, and performance.
8. Arcade trade	8.1 Work with arcade owners to improve amenity, identify and safety of the arcades 8.2 Work with arcade businesses to promote late opening hours 8.3 Work with arcade owners and businesses on the potential to promote a trail on themed uses in arcades	▪ Activating the arcades can provide a diverse, unique, and attractive element to the night time economy ▪ There are approximately 11 arcades along High Street, containing a large number and diversity of business types ▪ Arcades are used a key access routes from car parking to the city during the day, however they are closed at night, restricting pedestrian access.	Council: ▪ Implement process PCBDC: ▪ Engage stakeholders and develop planning and implementation	Short term – review of opportunities within arcades Medium term – trialled late night trading in arcades Long term – regular late night trading in most arcades	5 years 30% of arcades (and 50% of businesses in the arcades) are open until 10pm
9. Cultural / Civic Precinct	9.1 Work with JSC to support late night activity prior and post events 9.2 Work with stakeholders, including JSC, Westfield, and Council to consider re-design and reconstruction of the precinct to support evening outdoor dining and events 9.3 Investigate integrating library programming with evening activation of the precinct	▪ Building on existing assets in the precinct and improving integration and connectivity between precincts to activate the NTE.	Council: ▪ Implement process PCBDC: ▪ Engage stakeholders and develop programs	Medium term – consider options for redesign and events Long term – reconfigure precinct to enable greater interaction	Reconfiguration works to improve access to other precincts

PENRITH NIGHT TIME ECONOMY STRATEGY AND ACTIONS					
STRATEGY	ACTIONS	RATIONALE	RESPONSIBILITIES	TIMEFRAME	INDICATORS
10. Monitor	10.1 Develop a NTE Monitoring Plan to assess the levels of activity, key issues, barriers and potential opportunities for the city at night 10.2 Undertake biennial audit of the NTE 10.3 Update the NTE Strategy every 5-years.	▪ Ongoing monitoring and evaluation of progress can support Council and stakeholders to identify progress, and gaps in activity, and focus future activity and actions	Council: ▪ Develop plan, and undertake audit and update of strategy	Short term – develop plan and undertake audit Medium term – update strategy	Audit of NTE undertaken and trends and progress identified Strategy updated.

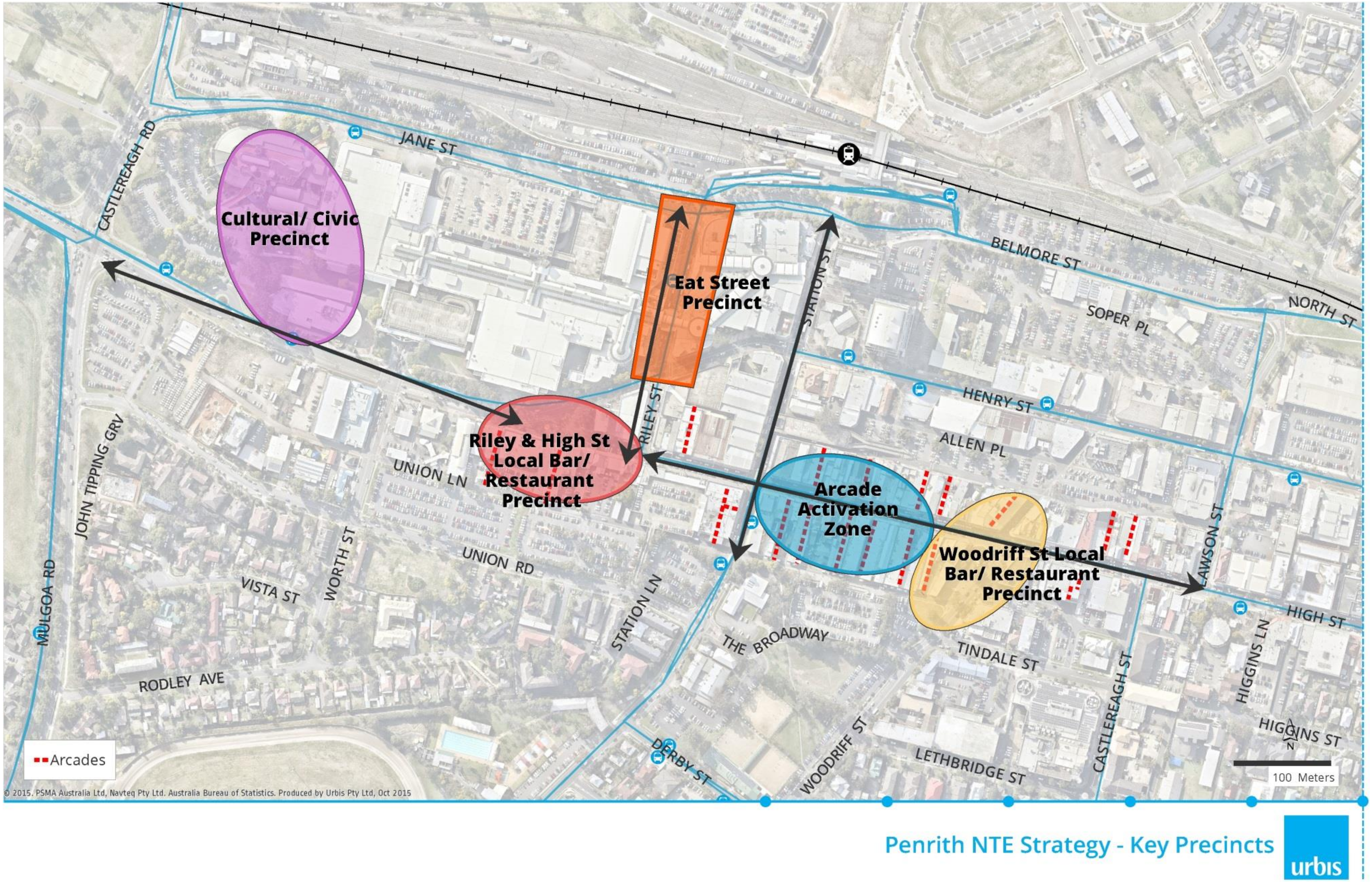
7.4 PRIORITY PRECINCTS

Penrith's current NTE is characterised by a number of areas of current activity, or areas for potential activity. Each area, or precinct, has unique characteristics and opportunities to support increased activity, build on existing strengths, and support the development of a diverse and vibrant NTE across the entire city.

Figure 10 below presents five distinct precincts in the city. Key issues, opportunities and focused actions have been identified for each precinct to build on the existing assets, maximise activity during the night time and contribute to the NTE in Penrith.

It is anticipated that the Strategies identified in Section 7.3 would be focused and integrated into planning for each of these precincts and key linked activities for each Precinct have been identified were relevant.

FIGURE 10 – PENRITH CITY NIGHT TIME PRECINCTS



7.4.1 CULTURAL AND CIVIC PRECINCT

The City benefits from significant cultural and civic assets located in close proximity to the main food and beverage areas and the High Street. These assets have the capacity to bring people into the city and create activity which can spill over into different parts of the city.

These assets include the Joan Sutherland Centre (JSC) which provides modern performing arts facilities and has an extensive calendar of performance events taking place each week. The Centre hosts evening events and includes a 580 seat concert hall, 378 seat drama theatre, 90 seat performance studio, 2 bars, and 27 meeting rooms, generating significant capacity for visitation.

Also, the precinct is characterised by the Penrith City Library, which closes at 8pm between Monday to Friday and 5pm on Saturday and Sunday, and the Penrith Civic Centre which closes to the public at 4pm.

ISSUES

- Limited activity after 5pm unless a performance is scheduled
- Hidden areas of open space create opportunities for antisocial behaviour
- Pedestrian barriers restrict access and integration with other night time precincts.

OPPORTUNITIES

- Maximise linkages between the precinct and other night time areas
- Activate the precinct at night, through extended opening hours, special events or outdoor events which attract people and create a “noisy buzz” which spills over into other precincts.

PRIORITY LINKED ACTIONS

- Strategy 9 Cultural and Civic Precinct – Council and JSC to work together to support late night activity prior and post programmed events
- Strategy 7 Events and Entertainment – Intergrade events and entertainment programming to activate the NTE
- Actions 5.1, 5.2 – Wayfinding improvements to allow greater access between night time precincts for mutual benefit.

7.4.2 EAT STREET PRECINCT

Currently the busiest area of the city at night is Riley Street passing through Westfield. The many cafes and restaurants in the area are busy up to 9-10pm of an evening. Premises provide high quality dining options with outdoor seating and dining. These premises play music into the street and create a vibrant atmosphere. These premises benefit from the significant patronage of the Westfield retail stores, and also the cinema.

OPPORTUNITIES

- Build on the success of this precinct by focusing on the diversification of other night time precincts to provide other options for after dinner activities

PRIORITY LINKED ACTIONS

- Action 5.1, 5.2 – Wayfinding improvements to allow greater access and integration between night time precincts for mutual benefit

7.4.3 SOUTH RILEY AND HIGH ST LOCAL PRECINCT

This area benefits from a wider pedestrianized section of High Street, new public plaza with seating, capacity to support outdoor dining, and a small pocket park. The precinct currently supports a number of local and unique food and beverage offerings including such as Talking Tables and Siam Thai with outdoor dining, and The Union Bar which provides a “hidden small bar” atmosphere which is growing in popularity.

ISSUES

- High St to the north acts as a pedestrian barrier between the precinct and the Cultural and Civic Precinct to the north
- Safety concerns relating to Union Lane and car parks to the rear
- Limited business activity of an evening near the new public plaza and seating area.

OPPORTUNITIES

- Maximising use of public realm improvements, including new seating, to activate the precinct at night
- Support diverse local food and beverage businesses to thrive during the evening
- Support outdoor dining and street activation.

PRIORITY LINKED ACTIONS

- Strategy 2 Public Domain Lighting – improve lighting in the area to attract evening outdoor dining
- Strategy 3 Public Domain Safety and Amenity – Review public domain safety, including CCTV policy and lighting, of the precinct, including Union Lane to the south
- Strategy 5 Marketing and Promotion – Marketing of the precinct as an alternative night time area providing local restaurants and bars
- Strategy 7 Events and Entertainment Program – Review options to activate the plaza at night, including performance events (eg. evening busking) and outdoor dining (eg. review DCP controls).

7.4.4 ARCADE ACTIVATION ZONE

Penrith's High Street is characterised by a number of unique arcades which make a valuable contribution to the public domain. There are approximately 11 arcades along High Street between Station Street and Woodriff Street. The arcades provide unique opportunities for a wide diversity of niche local businesses including book stores, clothes shops and health care shops. The arcades provide valuable pedestrian connectivity during the daytime between car parking areas and the High Street.

ISSUES

- Businesses in arcades are generally closed by 5pm, however arcades remain open later (closing between 9-10pm), creating deserted empty corridors between High Street and car parking to rear
- Poorly signposted entrances, "hidden" entrances, and lack of visibility from the High Street
- There are a number of security challenges created by arcades, including a lack of passive surveillance
- Potential limited capacity of small business tenant to operate into the night due to staffing or resourcing issues.

OPPORTUNITIES

- Maximise opportunities associated with the development of the Penrith Civic Heart park along Allen Place
- Improve diversity of the night time economy by supporting diverse retail and commercial activity as opposed to just food and beverage
- Activate the High Street and improve perceptions of safety in the night.

PRIORITY LINKED ACTIONS

- Strategy 8 Arcade Trade – Work with owners and businesses to develop options to support trailing of late night operation in the arcades
- Strategy 3 Public Domain Safety and Amenity – Collaborate with stakeholders to ensure arcades can operate safely at night
- Strategy 5 Wayfinding – Improve way finding and navigation to and from the arcades at night.

7.4.5 WOODRIFF STREET LOCAL PRECINCT

The Woodriff Street precinct is characterised by a number of popular restaurants located in former commercial buildings in the south (around Tindale St and Masters Place), the Memory Park, late night businesses along the High Street including takeaway food, restaurants, and a 24-hr pharmacy. Tot the north along Woodriff Street is a pedestrian walkway with access to Allen Place.

ISSUES

- Poor lighting in public park reducing potential activity

OPPORTUNITIES

- Build off the popularity of existing activity including the patrons of the 24hr pharmacy and nearby Penrith RSL Club

- Maximise the use of the pedestrianized area of Woodriff Street for outdoor dining, pop up stalls or markets, and opportunities associated with the development of Penrith Civic Heart

- Maximise usage of the public park and opportunities for outdoor dining or market stalls

LINKED ACTIONS

- Strategy 2 Public Domain Lighting – Review public domain lighting in side streets and public parks to enliven the areas and support outdoor activity at night

- Strategy 3 Public Safety and Amenity – Review CCTV arrangements and safety audit

- Strategy 4 Public Domain Infrastructure – Review of public spaces in accordance with Penrith Streetscape Improvement Masterplan and identify opportunities for outdoor dining, performance, or evening food markets.

7.4.6 ADDITIONAL PRECINCTS

Council has also identified two additional precincts which may support the development of the NTE in Penrith, they include:

- A Takeaway precinct to the east of Woodriff and West of Lawson Street – This area is currently characterised by a number of popular take away premises, as well as the Australian Arms Hotel

- A dining precinct on Henry Street – The area along Henry Street between Lawson and Evans Street includes a number of popular dining venues.

Appendix A Study Methodology

To address Council's objectives, the Penrith Night Time Economy Study has included the analysis of a range of data sources, in the following key stages.

FIGURE 11 – STUDY METHODOLOGY

Stage 1: Review of context

- Community profile - demographic and population projection data (ABS, Forecast.id)
- Economic profile - key economic indicators and patron spend data (ABS and Economic.id)
- Crime - crime rates (NSW BOCSAR)
- Policy - the strategic policy context
- Media perceptions - relevant media articles

Stage 2: Review of best practice

- Available literature on the night time economy
- Relevant national and international case studies

Stage 3: Audit of current night time activity

- Observation survey in key city centre streets to assess:
  - business and street activity
  - incidents of anti-social behaviour
  - security provisions
- Stakeholder consultation

AUDIT OF CURRENT NIGHT TIME ACTIVITY

The audit of current night time activity was undertaken using an observation survey methodology. Auditors surveyed key streets in Penrith City Centre over the following evenings:

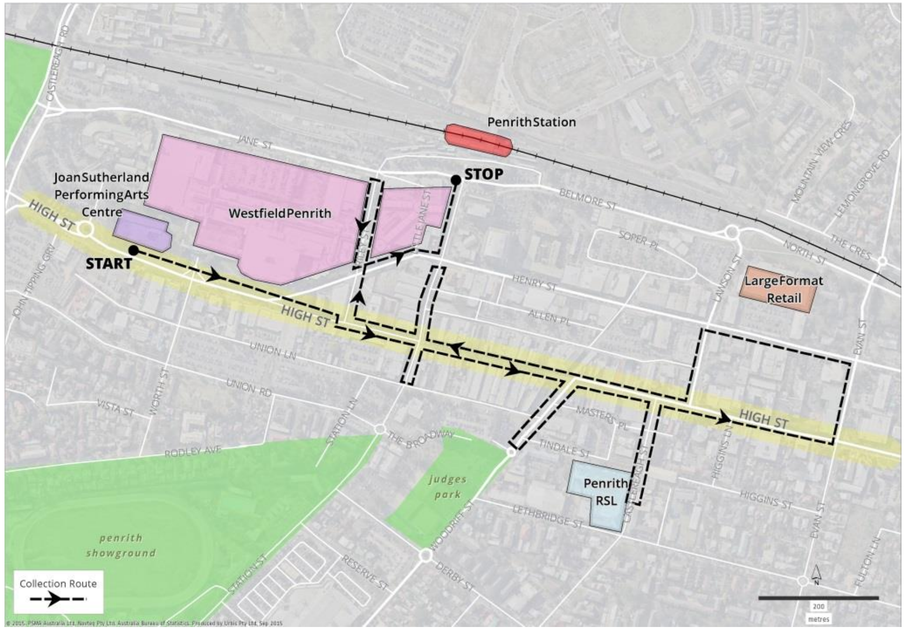
TABLE 5 – OBSERVATION SURVEY DATES AND TIMES

DATE	TIME	ROUTE REPETITIONS
Thursday 9 July 2015	6.00pm – 9.00pm	1
Saturday 11 July 2015	6.00pm – 9.00pm	2
Friday 28 August 2015	9.00pm – 12.00am	2

The weather was fair on Thursday and Friday audits, however raining on Saturday.

The observation survey route was developed in consultation with Penrith City Council. Figure 10 below outlines the survey route.

FIGURE 12 – OBSERVATION SURVEY ROUTE



Source: Urbis, 2015

STAKEHOLDER CONSULTATION

Stakeholder consultation was undertaken to test the findings of the study and develop future strategies. Specific consultation activities included:

- A focus group with internal Council officers
- A focus group with Penrith business and community representatives
- One-on-one interviews with local business owners.

The types of businesses interviewed included:

- A small bar
- A boutique weight loss studio
- A town planning practice.

Appendix B

Full community profile

CURRENT DEMOGRAPHIC PROFILE

The following provides a snapshot of the current[16] demographic profile of residents in the Penrith suburb (Penrith) and the Penrith Local Government Area (Penrith LGA), benchmarked against the Sydney Greater Capital City Statistical Area (Greater Sydney). A full demographic summary table is also available at Appendix D.

POPULATION SIZE AND AGE

In 2011 the total population of Penrith was 11,808, with 178,395 in Penrith LGA. The rural-residential nature of the wider Penrith LGA is reflected in its younger age profile, while Penrith has a slightly older population. Penrith is characterised by:

- An average age of 39.1 – compared to 34.9 in Penrith LGA and 37.1 in Greater Sydney
- A greater proportion of residents aged 65+years – 17% in Penrith, compared to 10% in Penrith LGA and 13% in Greater Sydney
- A smaller proportion of school age residents (5-19 years) – 16% in Penrith, 21% in Penrith LGA and 19% in Greater Sydney
- One in six residents (17%) is aged between 20 and 29 years – compared to 15% in Penrith LGA and Greater Sydney respectively.

PLACE OF BIRTH AND INDIGENOUS POPULATION

Penrith and Penrith LGA are characterised by a predominantly Australian-born and English-speaking population, with a slightly higher proportion of Indigenous residents than Greater Sydney.

- Over three quarters (77%) of Penrith residents were born in Australia compared to 78% in Penrith LGA and 64% in Greater Sydney
- Of the Penrith residents born overseas, the majority were born in the United Kingdom (6%), New Zealand (2%) or India (2%)

[16] Data is taken from the 2011 ABS Census

- Penrith has a slightly higher proportion of residents who identify as Aboriginal or Torres Strait Islander (0.4%) compared to Penrith LGA (0.3%) and Greater Sydney (0.2%).

EDUCATION, EMPLOYMENT AND INCOME

Penrith and Penrith LGA are characterised by a higher proportion of blue collar workers, lower levels of educational attainment and lower household incomes than Greater Sydney.

- Over a third (35%) of Penrith residents are blue collar workers, compared to 36% in Penrith LGA and 26% in Greater Sydney
- One in eight (12%) of Penrith residents have a Bachelor Degree, compared to 11% in Penrith LGA and 24% in Greater Sydney
- The average household income in Penrith is $62,539 compared to $85,548 in Penrith LGA and $94,428 in Greater Sydney
- Penrith has double the amount of households in rental stress (16%) compared to Penrith LGA (7%) and Greater Sydney (8%).

HOUSEHOLD STRUCTURE, HOUSING STATUS AND DWELLING STRUCTURE

Penrith is characterised by a high proportion of non-family households, renters and semi-detached dwellings.

- Two fifths (43%) of all Penrith residents live in lone person households compared to 19% in Penrith LGA and 23% in Greater Sydney
- More than half (51%) of all residents are renters, compared to 27% in Penrith LGA and 32% in Greater Sydney
- More than one in eight Penrith residents (14%) are public renters, compared to 5% in Penrith LGA Greater Sydney respectively
- One quarter (26%) of Penrith residents live in Semi-detached dwellings, compared to 11% in Penrith LGA and 13% in Greater Sydney
- A further quarter (26%) of Penrith residents live in flats, units or apartments, compared to 7% in Penrith LGA and 26% in Greater Sydney.

FUTURE DEMOGRAPHIC PROFILE

The following provides a snapshot of the future demographic profile of residents in the Penrith suburb (Penrith) and the Penrith Local Government Area (Penrith LGA).

POPULATION GROWTH BY AREA

Table 6 outlines projected changes to the population of the Penrith LGA over the next 16 years. The LGA as a whole is expected to grow 21%, with growth concentrated in key areas.

TABLE 6 – POPULATION PROJECTIONS – TOP TEN GROWTH AREAS IN PENRITH LGA

AREA	2011	2021	2031	TOTAL CHANGE 2011-31	% CHANGE 2011- 31
Penrith LGA	**184,722**	**206,195**	**223,631**	**+38,909**	**21%**
St Marys RA	3	5,260	9,512	+9,509	280,368%
Penrith Lakes	23	2,223	8,816	+8,793	38,960%
Penrith City	12,267	14,674	16,835	+4,568	37%
Caddens RA	22	2,534	3,443	+3,420	15,407%
Glenmore Park	20,721	24,537	23,949	+3,228	16%
Werrington	3,987	5,035	5,964	+1,977	50%
Kingswood	9,432	11,382	11,338	+1,907	20%
St Marys	11,695	12,413	13,030	+1,335	11%
Emu Plains	8,362	8,954	9,380	+1,018	12%
Cranebrook	15,217	16,072	16,200	+983	6%

Source: Forecast i.d., 2015

POPULATION GROWTH BY AGE

Table 7 outlines future population growth in Penrith and Penrith LGA by age breakdown. The greatest growth in Penrith will be seen in the young professional age group (20-34 years of age), with an additional 1,472 residents by 2031. The greatest growth in the wider Penrith LGA will be seen in a slightly older professional age group (30-44 years of age) with an additional 8,826 residents by 2031. The LGA will also experience strong growth in its population of young children. Both Penrith and the Penrith LGA will experience strong growth in the 65+ age group, with an additional 13,250 residents by 2031 in the LGA, 915 of which will live in Penrith itself.

TABLE 7 – POPULATION PROJECTIONS BY AGE

AGE CATEGORY	PENRITH			PENRITH LGA		
	2011 (%)	2031 (%)	TOTAL CHANGE (N)	2011 (%)	2031 (%)	TOTAL CHANGE (N)
Aged 0-4	7%	6%	**+170**	7%	7%	**+2,261**
Aged 5-9	5%	5%	**+240**	7%	7%	**+2,976**
Aged 10-14	5%	5%	**+206**	7%	7%	**+2,492**
Aged 15-19	5%	6%	**+424**	7%	7%	**+1,829**
Aged 20-24	8%	9%	**+553**	8%	7%	**+2,067**
Aged 25-29	9%	10%	**+465**	8%	8%	**+2,404**
Aged 30-34	8%	8%	**+455**	7%	8%	**+3,276**
Aged 35-39	7%	7%	**+296**	7%	7%	**+2,924**
Aged 40-44	6%	6%	**+278**	7%	7%	**+2,626**
Aged 45-49	6%	5%	**+140**	7%	6%	**+1,651**
Aged 50-55	6%	5%	**+122**	7%	6%	**+158**
Aged 55-59	5%	5%	**+182**	6%	5%	**+598**
Aged 60-64	5%	4%	**+123**	5%	5%	**+396**
Aged 65+	17%	18%	**+915**	9%	14%	**+13,250**
Total	100%	100%	**+4,568**	100%	100%	**+38,909**

Source: Forecast i.d., 2015

CRIME STATISTICS

Reported rates of crime are available from the NSW Bureau of Crime Statistics (BOCSAR) for the Penrith LGA. Table 8 below presents 2014 data on reported incidents of major crime types in Penrith LGA and NSW.

This indicates that the most common crime in Penrith LGA is malicious damage to property (1,160 incidents per 100,000 people) followed by stealing from a motor vehicle (733 incidents per 100,000 people).

This also suggests that compared to the rest of NSW, Penrith LGA has higher rates of reported crime per 100,000 residents for all major crime types with the exception of break and enter non-dwelling, steal from dwelling, and steal from person.

TABLE 8 – BOCSAR REPORTED CRIME 2014

OFFENCE	PENRITH LGA		NSW TOTAL	
	No.	Rate	No.	Rate
Assault - domestic violence related	1,066	560	29,070	392
Assault - non-domestic violence related	924	485	31,529	425
Sexual assault	154	81	4,737	64
Sexual offences	229	120	6,376	86
Robbery without a weapon	83	44	1,914	26
Robbery with a firearm	9	5	301	4
Robbery with a weapon not a firearm	48	25	1,204	16
Break and enter dwelling	1,057	555	33,932	458
Break and enter non-dwelling	292	153	12,734	172
Motor vehicle theft	559	294	14,861	201
Steal from motor vehicle	1,396	733	42,702	576
Steal from retail store	602	316	20,483	276
Steal from dwelling	539	283	22,335	301
Steal from person	146	77	6,131	83
Malicious damage to property	2,209	1,160	68,027	918

Notes:
No. = number of incidents
Rate = number of incidents per 100,000 population

Figure 11 and 12 present hotspots of reported incidents of malicious damage to property and robbery. Both demonstrate that the Penrith City includes hotspot areas for both crime types. While malicious damaged to property has been recorded across much of the city, including along High St, robbery has mainly been focused on the Westfield centre.

FIGURE 13 – REPORTED INCIDENTS OF MALICIOUS DAMAGE TO PROPERTY[17]

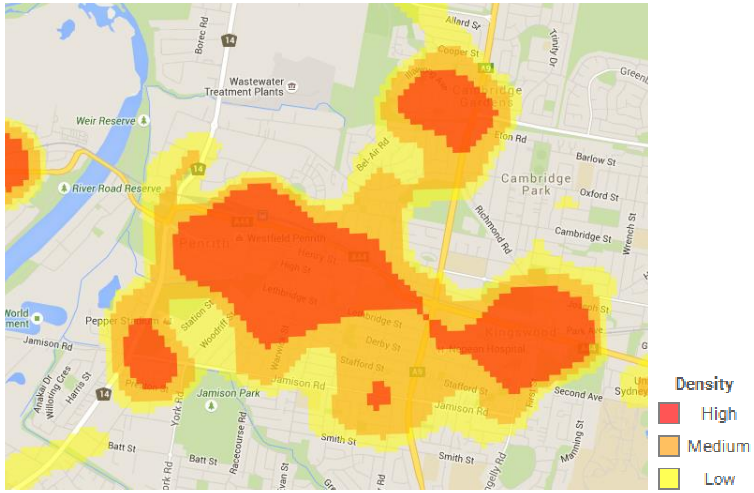


FIGURE 14 – REPORTED INCIDENTS OF ROBBERY

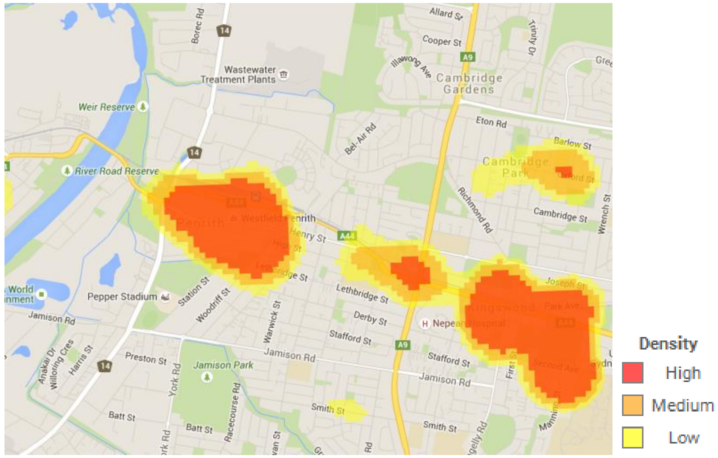
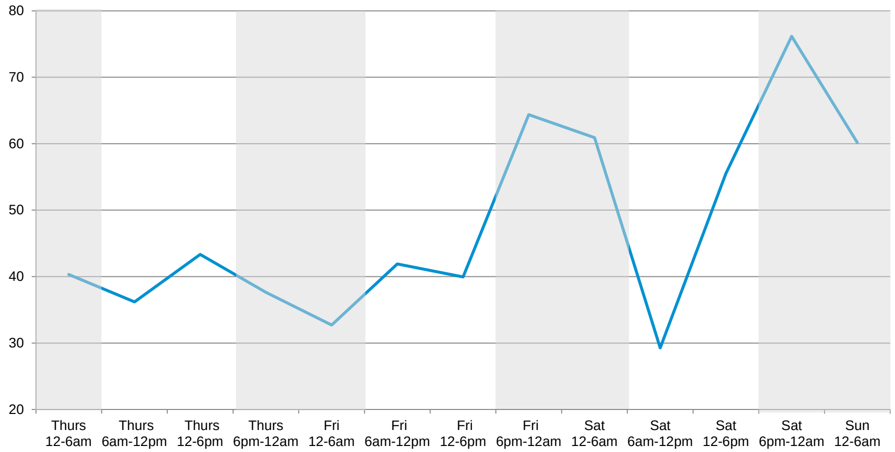


Figure 13 presents the timing of all major reported crime incidents in Penrith LGA in 2015. This indicates that most crime occurred in Penrith between 6pm-12am on Saturday, followed by Friday 6pm-12am.

FIGURE 15 – TIMING OF ALL MAJOR CRIME INCIDENTS IN 2015



17 BOCSAR. Crime mapping tool, 2015

Table 9 presents the number of reported crime incidents in Penrith LGA on Thursday, Friday and Saturdays in 2015 by day time (from 6am to 6pm) and night time (6pm to 6am the following day) periods. This indicates:

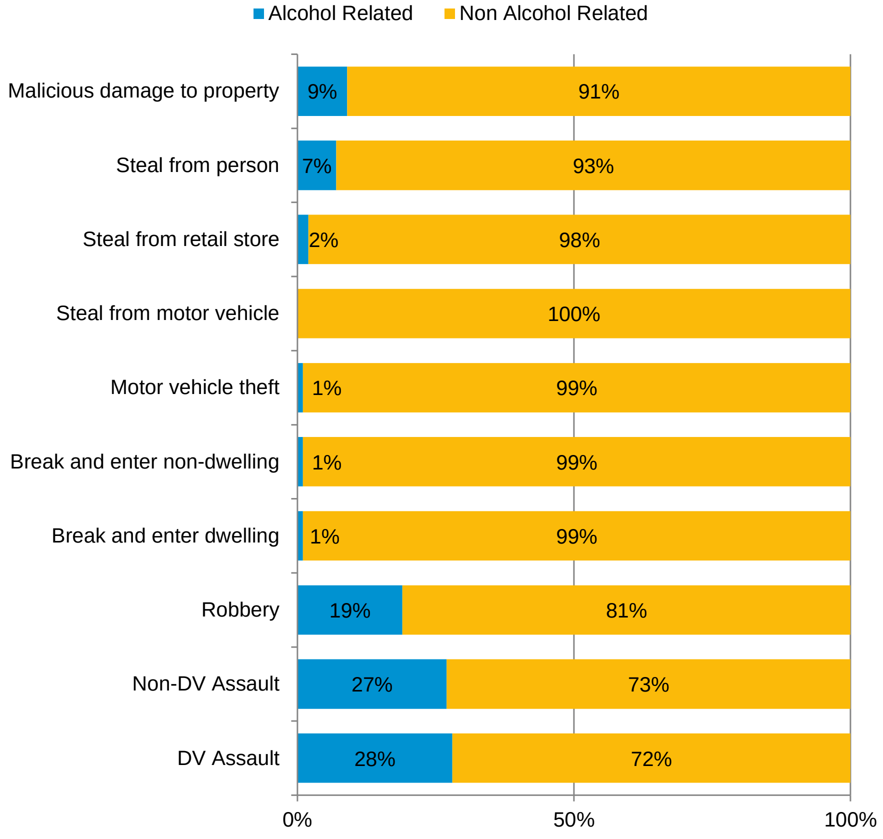
- In total, more major crime incidents were reported in the night
- time (332) compared to the daytime (246), equivalent to 58% of crime incidents over the period
- More incidents were reported on a Saturday night (136), followed by Friday night (125)
- All incidents of crime were more commonly reported in the night time, with the exception of sexual assault, break and enter to dwellings, steal from motor vehicle and steal from a person – all of which were more common in the day time
- Alcohol related assault was the most common crime reported during the night time (52.3 incidents) followed by break and enter to non-dwellings (38.3 incidents).

TABLE 9 – TIMING OF REPORTED CRIME INCIDENTS IN PENRITH LGA 2015

OFFENCE	THURSDAY		FRIDAY		SATURDAY		TOTAL	
	Day time	Night time	Day time	Night time	Day time	Night time	Day time	Night time
DV Assault	6.6	5.7	5.8	9.4	8.3	8.6	20.7	23.7
Non-DV Assault	8.4	6.1	5.9	10.5	6.6	13.7	20.9	30.4
Alcohol related assault	2.5	6.8	2.5	20.2	5.3	25.3	10.3	52.3
Sexual assault	8.0	3.4	5.7	5.7	9.2	5.7	23.0	14.9
Robbery	6.5	7.2	8.6	13.7	7.9	10.1	23.0	30.9
Break and enter dwelling	8.2	5.1	12.6	5.1	7.3	7.1	28.1	17.3
Break and enter non-dwelling	1.9	10.3	0.9	15.0	1.9	13.1	4.7	38.3
Motor vehicle theft	5.9	6.4	8.2	12.7	5.5	12.7	19.5	31.8
Steal from motor vehicle	7.3	5.4	9.4	5.9	10.6	7.8	27.3	19.1
Steal from dwelling	4.9	4.1	8.1	9.3	6.9	7.3	19.9	20.7
Steal from person	13.5	2.8	7.8	7.1	7.8	13.5	29.1	23.4
Malicious damage to property	5.9	7.0	6.2	10.6	7.6	11.4	19.6	29.0
TOTAL	**79.5**	**70.3**	**81.8**	**125.3**	**84.8**	**136.3**	**246.1**	**331.9**

Figure 14 presents the proportion of major incidents reported in Penrith which were related to Alcohol. This indicates that in Penrith in 2015 most crime incidents were non-alcohol related incidents. Over one quarter (28%) of domestic violence assaults were alcohol related, as were non domestic violence assaults (27%). One fifth of robbery crimes were alcohol related (19%) as were less than one in ten incidents of malicious damage to property (9%) or stealing from a person (7%).

FIGURE 16 – ALCOHOL RELATED REPORTED CRIME IN PENRITH 2015



ECONOMIC CONTEXT

The Penrith Valley Economic Corridor Study[18] highlighted why the Penrith Regional City Centre is economically important within Sydney metropolitan region for the following reasons:

- It's strategic location on the Western Railway Line and the M4 motorway and gateway location for passage between Sydney and western NSW
- Proximity to the world-heritage listed Blue Mountains National Park
- Key higher order commercial centre for Sydney's outer west and north west sub-regions and for Western NSW
- One of Sydney's most significant new residential frontiers
- Significant number of sporting and recreational assets
- Major industrial zones, with a number of business, transport and logistics business parks linked to the M7 motorway
- Penrith is a growing locational centre for higher order educational and health services.

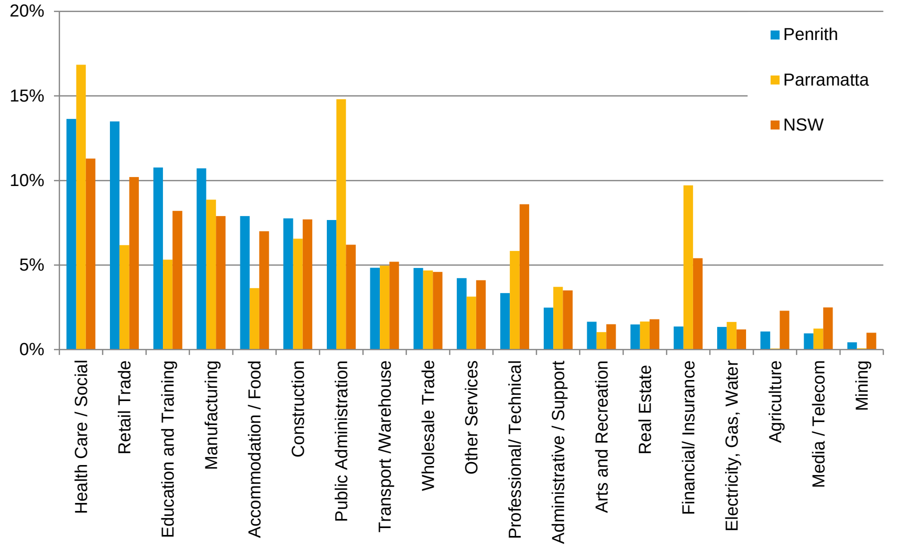
The UWS Economic Corridor Study showed diversification in the composition of its resident labour force, with a close match between the composition of local employment demand (i.e. jobs on offer) and the local labour supply (or household worker characteristics). Labour market analysis at that time showed that there were significant opportunities for the expansion of enterprises in non-traditional sectors in the Penrith LGA, many of which could be considered relevant to a burgeoning night time economy.

Key economic indicators for Penrith LGA include:

- Gross Regional Product (GRP) is estimated at $7.61 billion, equivalent to 1.6% of the NSW Gross State Product, with growth each year since 2008
- 12,424 local businesses supporting 70,443 jobs in the local area, equivalent to 2.0% of all jobs in NSW, with jobs growth each year since 2005
- Unemployment of 6.2% of residents, compared to 6.0% across NSW

Figure 15 presents the proportion of employment in key industry sectors. This indicates that Health Care and Social Assistance services employ more than one in ten (14%) people in Penrith, compared to 17% in Parramatta and 11% across NSW. It is anticipated that this is the largest employment sector due to the proximity of the Nepean Hospital medical employment centre.

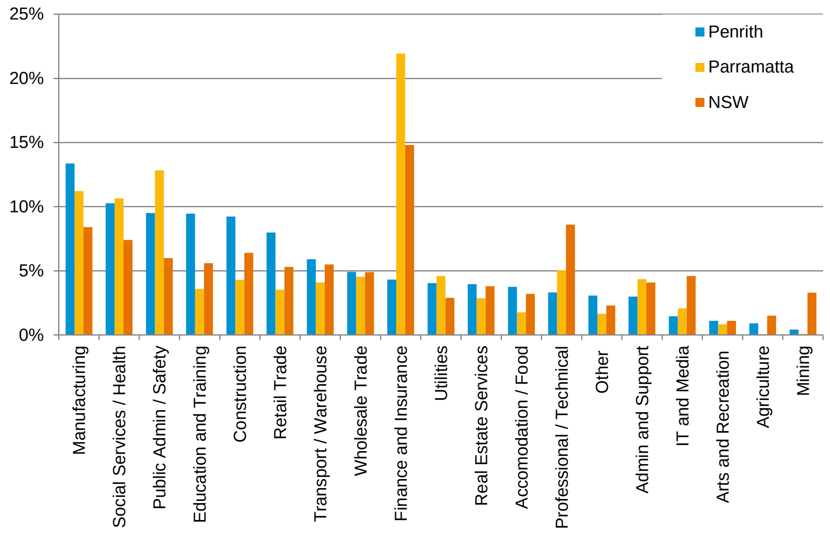
FIGURE 17 – PROPORTION OF EMPLOYMENT BY SECTOR 2013/14



The total value added by industry in Penrith in 2013/14 was $6.5billion. Figure 16 presents the proportion of this value added by industry sector. This indicates that manufacturing was the most productive industry in Penrith, generating 13% of all value added, equivalent to $869 million. By comparison, financial services were the largest value add sectors for Parramatta (22%) and NSW (15%). Also, in Penrith accommodation and food sector accounted for 4% of all value added to the economy.

18 Developing a Penrith Valley Economic Corridor, UWS, 2011.

FIGURE 18 – PROPORTION OF VALUE ADDED BY INDUSTRY SECTOR 2013/14



There are 12,424 local businesses in Penrith. Figure presents the proportion of businesses in each industry. This indicates that Construction accounts for close to one quarter (24%) of all business, while accommodation and food services account for less than 3%.

Table xx presents the number of jobs and total sales revenue by sectors which typically make up key night time economy activities, including food, beverage, accommodation and cultural activities. This indicates:

- Penrith LGA supports over 9,500 retail jobs, 5,500 accommodation and food and beverage jobs, and 1,165 jobs in art and culture
- Over $240million was generated by accommodation and food and beverage in Penrith LGA, similar to Parramatta ($264million)
- However Penrith LGA generated greater number of jobs (5,250) and revenue ($223million) from food and beverage services compared to Parramatta LGA (3,694 and $56million)
- Penrith LGA generates more jobs in cultural and heritage and sport and recreation (1,099) compared to Parramatta (860), yet recreation spending in Parramatta was higher due to the dominance of gambling activities ($9.6million in Penrith compared to $65.6million in Parramatta)

TABLE 10 – EMPLOYMENT AND SALES FOR KEY NTE SECTORS

	PENRITH LGA		PARAMATTA LGA	
INDUSTRY	JOBS NO.	SALES $MIL	JOBS NO.	SALES $MIL
Total Retail	**9,504**	**$518.6**	**7,417**	**$528.4**
Other	1,109	$103.0	1,512	$166.0
Food Retailing	3,082	$170.2	1,440	$100.0
Other Store Based Retailing	5,313	$245.4	4,465	$262.4
Total Accommodation and Food	**5,560**	**$243.6**	**4,371**	**$264.1**
Accommodation	310	$20.4	677	$207.8
Food and Beverage Services	5,250	$223.2	3,694	$56.3
Total Arts and Recreation	**1,165**	**$71.3**	**1,248**	**$125.5**
Other (cultural and heritage)	282	$10.8	270	$18.8
Sports and Recreation	817	$50.9	590	$41.1
Gambling Activities	66	$9.6	388	$65.6

Table 11 presents residents spending per capita, on selected goods and services, in 2012 for Penrith suburb, Penrith LGA and Sydney as a whole. It should be noted that this does not take into account the potential difference in income patterns between the areas. This indicates that:

- Spending on take away food ($803) was higher than spending on cafes and restaurant dining ($712) in Penrith. The converse was true for the rest of Sydney ($1,011 spent on restaurant dining)

- More than double was spent on take home liquor ($600) compared to on premises liquor ($291) in Penrith, which was similar to Sydney as a whole ($610 and $309 respectively)
- Spending on Cultural activities, cinema admissions, music and concerts and live theatre, were all lower in Penrith compared to Sydney as a whole.

TABLE 11 – SPENDING ON PRODUCTS AND SERVICES IN 2012[19]

SERVICE / GOODS	PENRITH SUBURB		PENRITH LGA		SYDNEY	
	$	%	$	%	$	%
Take-Away Food	$803	23%	$803	23%	$829	21%
Cafes & Restaurants	$712	21%	$704	20%	$1,011	26%
Take Home Liquor	$600	17%	$623	18%	$610	16%
Liquor on Premises	$291	8%	$279	8%	$309	8%
Beer Off Licensed	$259	8%	$276	8%	$216	6%
Wine Off Licensed	$162	5%	$161	5%	$239	6%
TAB	$145	4%	$170	5%	$116	3%
Sports Expenditure	$135	4%	$157	4%	$169	4%
Auto Accessories	$72	2%	$77	2%	$70	2%
Gym Membership	$68	2%	$64	2%	$76	2%
Cultural	$61	2%	$78	2%	$105	3%
Cinema Admissions	$52	1%	$52	1%	$65	2%
Music & Concerts	$37	1%	$36	1%	$45	1%
Live Theatre Spending	$21	1%	$20	1%	$28	1%
Dance & Nightclubs	$12	0%	$12	0%	$13	0%
TOTAL	**$3,430**	**100%**	**$3,512**	**100%**	**$3,900**	**100%**

19 Marketinfo 2012

Appendix C NTE Audit Maps

MAPS

Figure 19, Figure 20 and Figure 21 present a visual summary of business and patron activity on each night.

The maps show that there are key areas of activity – The most active area is the Riley Street restaurant precinct. The next most active (besides Penrith RSL) is some 500m away on the corner of High Street and Lawson Street (through to Henry Street).

Minor incidents of antisocial behaviour were observed on Thursday, with the main incident being congregation and loud shouting near the JSC, on Friday, with shouting and revving of car engines along High Street.

FIGURE 19 – NTE ACTIVITY AUDIT RESULTS THURSDAY 2015

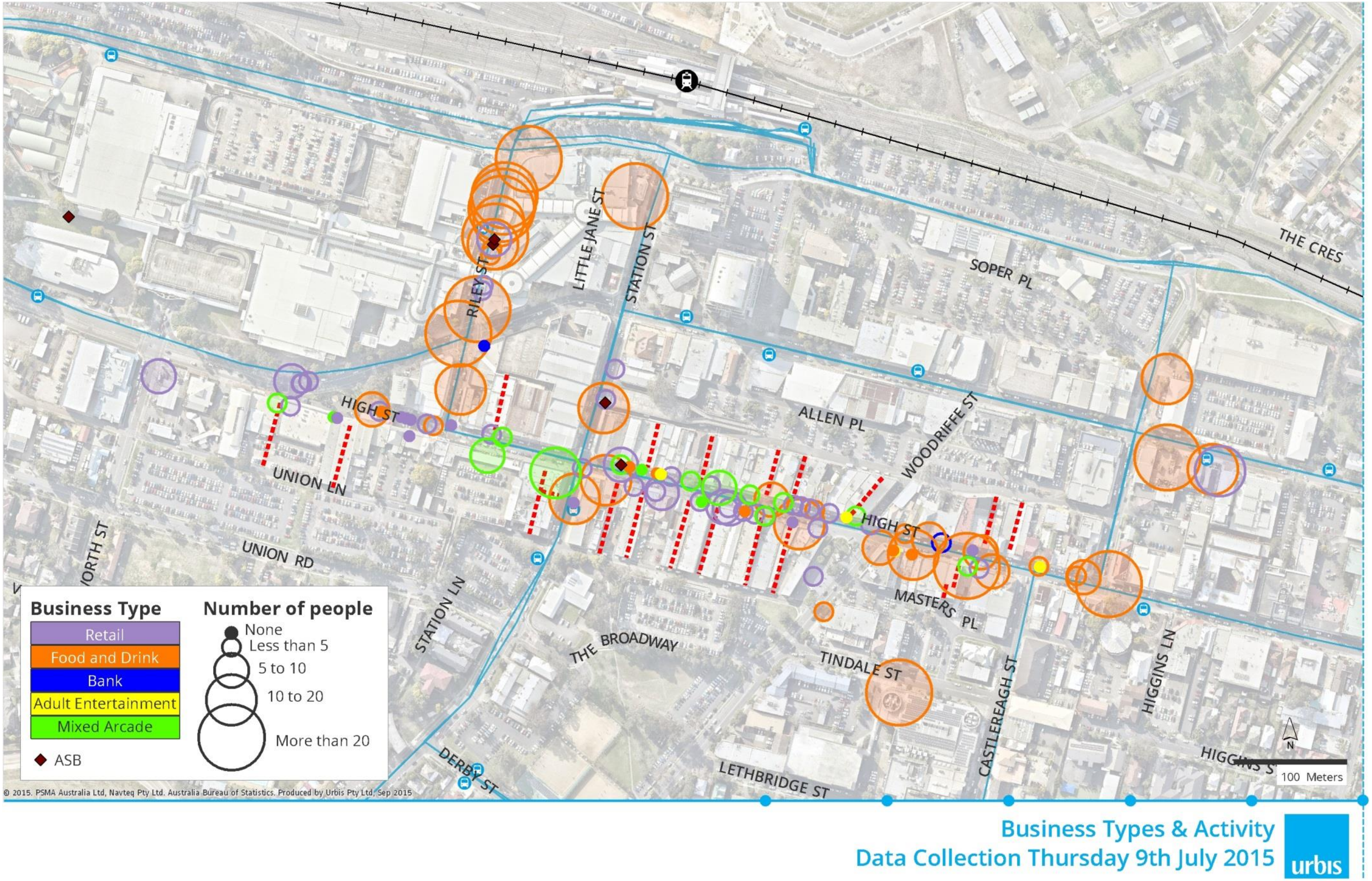


FIGURE 20 – NTE ACTIVITY AUDIT RESULTS FRIDAY 2015

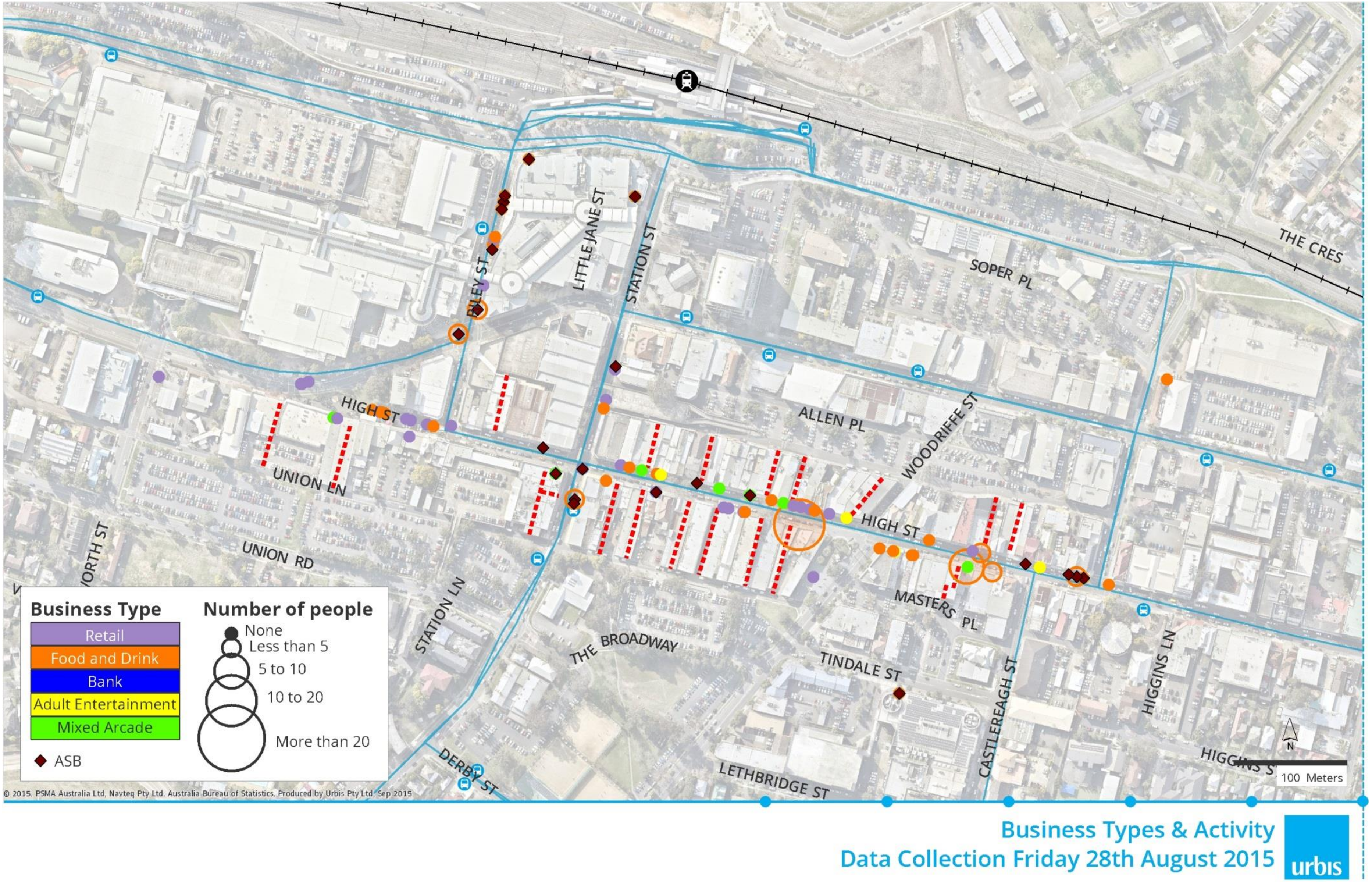
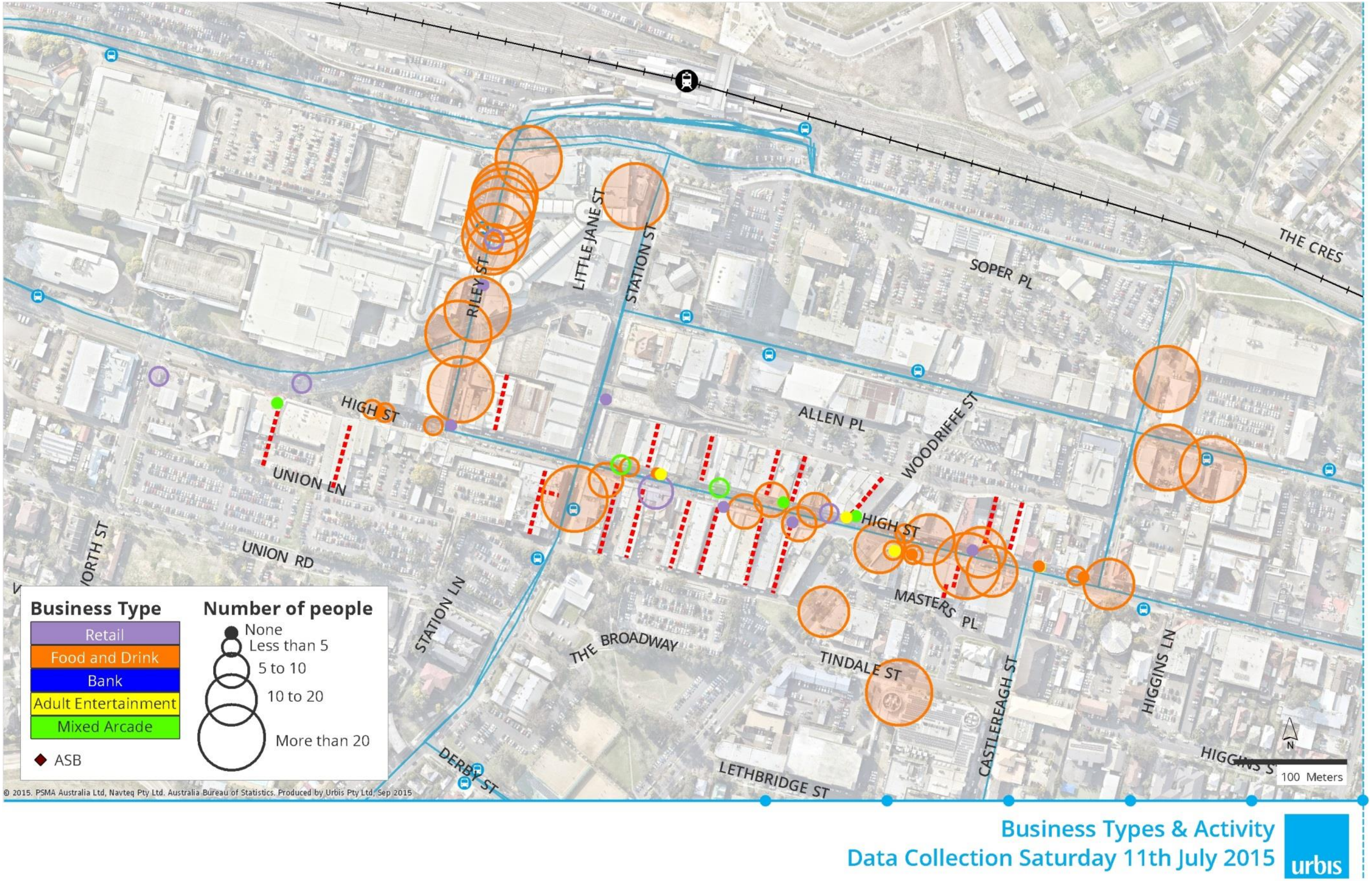


FIGURE 21 – NTE ACTIVITY AUDIT RESTULTS SATURDAY 2015



Appendix D

Current demographic profile: summary table

DATA ITEM	PENRITH SUBURB	PENRITH LGA	SYDNEY GCCSA
Total population	11,808	178,395	4,390,956
Age Distribution (%)			
Aged 0-4	6.9%	7.6%	6.8%
Aged 5-9	5.3%	7.0%	6.3%
Aged 10-14	5.2%	7.1%	6.1%
Aged 15-19	5.3%	7.3%	6.3%
Aged 20-24	7.8%	7.5%	7.0%
Aged 25-29	9.1%	7.5%	7.8%
Aged 30-34	7.5%	7.2%	7.6%
Aged 35-39	7.2%	7.3%	7.6%
Aged 40-44	6.1%	7.0%	7.3%
Aged 45-49	6.2%	6.8%	7.0%
Aged 50-55	6.1%	6.9%	6.6%
Aged 55-59	5.1%	6.0%	5.7%
Aged 60-64	5.1%	5.4%	5.1%
Aged 65+	16.8%	9.6%	12.9%
Aged 18+	79.5%	73.88%	77.07%
Country of birth and Indigenous identification			
Australia born	76.5%	78.1%	63.7%
Overseas born	23.5%	21.9%	36.4%
United Kingdom	6.0%	5.0%	4.4%
New Zealand	2.0%	1.9%	2.1%
India	1.6%	1.4%	2.1%
Indigenous population	0.4%	0.3%	0.2%

Household Income (%)			
$Neg/Nil	1.2%	1.0%	1.7%
$1-$10,400	2.1%	1.4%	1.7%
$10,400-$15,600	5.4%	2.5%	2.8%
$15,600-$20,800	12.2%	5.6%	5.7%
$20,800-$31,200	11.4%	8.4%	8.5%
$31,200-$41,600	11.1%	8.3%	8.0%
$41,600-$52,000	9.1%	8.1%	7.6%
$52,000-$65,000	10.0%	9.6%	8.1%
$65,000-$78,000	8.5%	8.8%	7.6%
$78,000-$104,000	12.0%	15.2%	12.6%
$104,000-$130,000	7.8%	12.2%	9.4%
$130,000-$156,000	4.8%	8.3%	10.6%
$156,000-$182,000	2.3%	5.3%	6.4%
$182,000-$208,000	1.0%	2.3%	3.3%
$208,000 plus	1.1%	3.1%	6.1%
Average Household Income	$62,539	$85,548	$94,428
Housing Status (%)			
Owner	22.6%	27.4%	31.1%
Purchaser	25.0%	44.7%	35.7%
Renter	51.0%	27.3%	32.4%
Public Renter	13.5%	5.2%	5.4%
Private Renter	37.5%	22.1%	27.0%
Households in Mortgage Stress (% households)	2.1%	4.0%	3.0%
Loan Mortgage Repayments (monthly $)	$1,864	$2,050	$2,424
Households in Rental Stress (% households)	15.8%	7.0%	7.8%

Rent Payments (weekly $)	$252	$289	$397
Household Structure (%)			
Family Households	57.3%	78.3%	73.1%
Non-Family Households	42.7%	21.7%	26.9%
Group	4.2%	2.5%	4.3%
Lone Person	38.5%	19.2%	22.6%
Family Composition (%)			
Couple family with no children	35.9%	29.5%	33.5%
Couple family with children under 15	24.7%	32.5%	32.5%
Couple family with no children under 15	11.0%	17.3%	16.4%
One parent family with children under 15	13.4%	10.3%	7.3%
One parent family with no children under 15	11.9%	8.9%	8.4%
Other	3.1%	1.5%	1.9%
Labour Force			
% Unemployed	8.1%	5.6%	5.7%
Labour Force Participation	61.8%	69.3%	65.6%
Occupation (%)			
White Collar (%)	65.5%	63.9%	74.3%
Blue Collar (%)	34.5%	36.1%	25.7%
Managers	9.7%	10.3%	13.5%
Professionals	17.6%	14.2%	26.0%
Technicians & trades workers	13.6%	15.5%	12.4%
Community & personal service workers	10.8%	9.9%	9.0%
Clerical & administrative workers	17.8%	19.4%	16.5%
Sales workers	9.7%	10.1%	9.2%
Machinery operators & drivers	11.1%	10.9%	5.8%
Labourers	9.8%	9.7%	7.5%

Tertiary Education (%)			
Bachelor Degree or Higher	12.3%	10.6%	24.1%
Adv. Diploma or Associate Degree	6.8%	7.1%	9.0%
Undertaking Tertiary Education	3.4%	3.9%	6.5%
Highest Level of Schooling Achieved (%)			
Year 8 or Below	7.8%	5.9%	5.3%
Year 9 or Equivalent	9.9%	8.6%	5.3%
Year 10 or Equivalent	33.0%	35.6%	21.0%
Year 11 or Equivalent	6.3%	6.2%	4.7%
Year 12 or Equivalent	42.3%	43.1%	62.3%
Did not go to School	0.6%	0.6%	1.5%
Dwelling Structure			
Separate House (%)	48.0%	81.6%	61.0%
Semi-detached (%)	25.7%	10.9%	12.8%
Flat, Unit or apartment (%)	26.1%	7.1%	25.8%
Other dwelling (%)	0.2%	0.4%	0.5%

Source: ABS, 2015

Appendix E Case studies

LESSONS FROM OTHER NIGHT TIME ECONOMIES

An important part of this project is to understand examples of how other cities have approached and planned for their Night Time Economies. The focus has been on initiatives from contextually relevant cities that have helped create a vibrant day and night time economy or are at least have been adopted in order to create a more active NTE.

Cities selected for case study review are:

- Parramatta, Western Sydney: Sydney's second centre is also Western Sydney's primary commercial centre. It is now renowned for having a successful night time economy that is built around the large number of employees and residents that now work and live there. A NTE built upon more people working and living in the Parramatta City Centre may be a key lesson for Penrith.
- Bendigo, Victoria: Greater Bendigo is a major regional centre servicing the towns and rural areas of the Loddon region, about 150 km's north-west of Melbourne. Its regional significance as a service centre to surrounding communities is similar to the role that Penrith plays. Bendigo also experiences a strong health, education and retail sector in the city, with an increase in. commerce, finance and government administration activities. Their attempt to build a night time economy based on these characteristics generates important lessons for Penrith.
- Lexington, Kentucky, USA: Lexington is a major regional City in the state of Kentucky, USA.

CASE STUDY 1: PARRAMATTA

STRATEGIC POSITIONING

A Plan for Growing Sydney, the NSW Government's metropolitan planning strategy, states that Parramatta is Sydney's western CBD. The Strategy states that the scale and mix of commercial, health and education facilities make it a centre of metropolitan significance. The Strategy also states that Greater Parramatta is diversifying with growth in knowledge industries and increasing numbers of more highly qualified people working in the area. As

Parramatta will continue to grow in significance to Sydney, there is a requirement for large-scale investment and greater diversity of activities in Greater Parramatta. To achieve this, the Strategy notes that to fulfil its role, Parramatta also needs expanded arts, culture and entertainment activities to increase its appeal as a dynamic and diverse place to work, live and play.

Council's vision for the City is for 'a successful and thriving CBD with a commercial heart' to provide better services and facilities and greater opportunities for residents. Council's economic objective is to develop the City as a centre of high value-adding employment and the driving force behind the generation of new wealth for Western Sydney.

Central to plans for the revitalisation of the Parramatta CBD is the Parramatta Square development on three hectares of council owned land which will include public space, corporate facilities, residential apartments, a new council headquarters and retail and dining spaces. This is due for completion in 2020.

The Parramatta CBD is also characterised by the following:

- It is the fourth largest commercial office location in Sydney
- It has a strong retail component, which is anchored by Westfield Shoppingtown adjacent to the railway station
- A cluster of retail outlets and food/drink establishments along its main north-south street (Church Street) between the railway station and Parramatta River
- Parramatta also has an increasing number of restaurants, bars and cafes on its main east-west streets (Macquarie, George and Phillip Streets) in support of the growing commercial and retail presence around the CBD
- It is well serviced by public transport, being located on the Sydney Trains Western and Cumberland lines, as well as being a major bus interchange for transit way services to north-west and south-west Sydney.

THE NIGHT TIME ECONOMY IN PARRAMATTA

A study undertaken for Parramatta City Council "The City After Dark. Cultural Planning and Governance of the Night Time Economy in Parramatta" (UWS, 2008) noted that while Parramatta had adopted an 'arts, culture and creativity-led strategy of re-invention' there was a disconnect between day time activities and the night time economy with an absence of a coherent, integrated night-specific place-making strategy. Limited connections existed between different city spaces and late night venues were sparsely located with irregular surges between licensed premises.

There is evidence, however, that since 2008 the night time economy in Parramatta has evolved. In a 2013 press release Council announced that Parramatta was now the fastest growing night time economy in Australia. Council suggested this underlined the work it has undertaken to activate key areas of the City by providing a more diverse range of experiences including food trucks in Church Street Mall, the Parramatta Lanes event as part of the Crave Sydney Food Festival and row boats by the River.

According to Parramatta Council, the CBD now has 180 restaurants, cafes, eateries and bars open at night. In addition, Parramatta hosts the Parramatta Farmers Market each Friday night. Hotels and bars range from traditional type pubs to cocktail bars and boutique beer cafes. A range of drama and musical events are performed at the Riverside Theatre and Parramatta Stadium hosts sporting events which helps generate regular weekend activity in Parramatta throughout the year. In addition annual festivals such as the Sydney Festival, Parramatta Lanes, Winterlight Festival, Loy Krathong, New Years Eve, Australia Day and Lunar New Year are held in Parramatta.

Figures cited by Council from the Local Government Alcohol and Drug Network 2013 report showed revenue from Parramatta's night time economy to be $760 million. This represented an increase of $44 million in sales revenue between 2009 and 2011 providing an additional 400 jobs. There was a 17.8% increase in the number of restaurants and cafes accounting for 59% of the total of night time revenue sales.

PARRAMATTA'S NIGHT TIME ECONOMY STRATEGY

The 2008 City After Dark study provided number of recommendations for the development of the night time economy in Parramatta. These included:

- The establishment of a 24-hour planning framework to nurture the three interconnected elements of people, place and creativity;
- Using the opportunity to make more creative use of civic spaces for diverse after-dark uses with an arts/culture emphasis;
- Using the opportunity for sports events to be integrated with the night time economy, particularly the high volumes of pedestrian traffic from events at Parramatta Stadium.

The study suggested the 24-hour planning framework should:

- combine land-use, infrastructure, cultural, economic and social planning processes;
- support both government and non-government service providers and local businesses;
- establish and maintain effective communication with local communities;
- ensure that urban planning and development is not focused narrowly on specific locations and sites;
- address the way in which spaces connect and are used at different times of the day.

Subsequent strategies and policies have started to address some of the issues raised in the 2008 study. Parramatta CBD Planning Strategy includes in its vision landmark buildings and high quality public space, respect for heritage, excellence in building design, jobs growth and streets that are active. It investigates the potential for expansion of the City Centre boundaries and outlines built form controls for different precincts in the CBD.

Parramatta City Council's 2010 'Parramatta City Centre Lanes Strategy' recognises lower traffic volumes in lanes create a potential to locate cafes and bars contributing to day time and night time social life in the city. The Strategy encourages the revitalisation of existing lanes and the establishment of new lanes in order to create greater pedestrian connectivity, more active uses, greater passive surveillance and safety through retail and dining and more public spaces. The 2014 Public Domain Guidelines also supports the activation of lanes.

A recent initiative of Parramatta City Council is 'Activate! Parramatta'. The initiative provides grants of up to $10,000 or in-kind support to businesses to help activate the public domain. According to the Lord Mayor of Parramatta the initiative has been designed to "activate public and commercial spaces to make Parramatta an even more exciting, vibrant and engaging place to live, work and play both day and night".

LESSONS FOR PENRITH

Relevant from Parramatta for Penrith Council to consider in generating a larger Night Time Economy are:

- Create a 24-hour planning framework that considers the effectiveness of land uses over a 24-hour periods, not just at different times of the day and night. Such a framework helps link day time activity to night time activity could be beneficial in the Penrith context.
- Parramatta's NTE growth has been led by the food and beverage sector. Penrith Council are in a good position to drive Penrith's NTE behind an already strong and diverse restaurant presence
- Parramatta Council has played a proactive role in encouraging innovative street activities. Consideration could be given to incentivise activation of street areas for a variety of land uses, functions and events.
- Parramatta have enlivened and activated areas that were once largely inactive at night e.g. lane ways, arcades. This is of particular relevance to Penrith's situation
- Parramatta consciously promoted the role that its sporting teams could play in generating synergies with the NTE. Again this is also relevant to Penrith, which has its main sporting stadia located adjacent to the City Centre.

CASE STUDY 2: BENDIGO

STRATEGIC POSITIONING‘

Bendigo’s vision for the city outlined in the City of Greater Bendigo’s ‘Economic Development Strategy 2014-2020’ is that the city will be acknowledged as one of Australia’s most progressive regional cities. It states that Bendigo will develop as the vibrant regional capital city serving north-central Victoria and central-southern NSW.

The City sees not only continued development in the region of traditional industries such as mining, manufacturing and farming, but an expansion of health, education and arts based economic development, which will be focussed in the City itself. The Economic Development Strategy predicts that with continued growth in numbers enrolled at the Bendigo campus of La Trobe University, Bendigo will be seen as a regional university city. There are also plans for the establishment of the university’s Bendigo Art Institute in conjunction with the Bendigo Art Gallery.

The CBD of Bendigo is located in a natural dish, the low point being Bendigo Creek along the northern and western edges. Rosalind Park located in the north east corner contains sporting facilities including and oval and aquatic centre. The Bendigo Economic Development Strategy predicts new residents will be attracted to live in the Greater Bendigo area, including residents who will be attracted to ‘inner city’ living within the CBD.

Bendigo CBD is also an important commercial centre, being the headquarters of institutions such as the Bendigo Bank. Significant educational institutions are located in the CBD including La Trobe University facilities, the Bendigo TAFE and Bendigo Senior Secondary College. The city also hosts an art gallery, theatre and Chinese gardens and museum.

One of the attractions of Bendigo for new residents and associated development, is its high level of urban amenity. This includes:

- A VicRail railway station connects Bendigo to surrounding suburbs and towns and to Melbourne and a tram runs through the centre of the city

- Its valuable heritage, preserved since its time as an early gold mining centre, which is reflected in many of the towns buildings which help to make the city a tourist destination

- Its strong retail core, which contains Myer, Hargreaves Mall, several supermarkets and department stores and the Market Place (an enclosed shopping mall)

- Cultural attractions such as the Bendigo Art Gallery, Bendigo Central Library and the Ulumbarra Theatre with an annual calendar of major events.

THE NIGHT TIME ECONOMY IN BENDIGO

Similar tom Penrith, there is limited retail activity in Bendigo at night with major shopping outlets closing most nights by 5.30 pm. Bendigo’s late night shopping night is Friday, with many retail businesses remaining open during this time. The advantage of Friday night is that it combines will activities associated with the end of the working week.

On the other hand, he Bendigo Tourism website suggests that an active NTE exists in Bendigo because of the large number of quality restaurants, cafes, wine bars, nightclubs, pubs and lounges now available.

Bendigo also has a thriving performing arts scene, with 150 live theatre and music events throughout the year, including evening performances at a number of venues including The Capital, Ulumbarra Theatre and The Engine Room.

One of the popular new additions to the NTE is the night time market, which opens over spring and summer once a month in Hargreaves Mall. As well as handicrafts the markets will feature live entertainment.

BENDIGO’S NIGHT TIME ECONOMY STRATEGY

The City of Greater Bendigo’s Economic Development Strategy supports civic beautification and activation programs in activity centres and encourages the development of restaurants, cafes and bars throughout central Bendigo. Council also seeks to encourage cafes, restaurants and select retailers to extend trading hours.

While it doesn't specify night time activity, the Greater City of Bendigo's draft 2015 'Commercial Land and Activity Centre Strategy' suggests retail activity in a regional context is generally the basic 'building block' for an activity centre network. Retail generates numerous trips to the centre, providing opportunities for co-location of other land uses. For example, multi-purposes trips may combine shopping with entertainment.

The Activity Centre Strategy establishes a retail hierarchy with Bendigo City Centre as the 'Central City'. It suggest the 'cultural retail' model which positions arts at the centre and combines museums, galleries, studios, arts, retailers, offices, dwellings in a mixed use precinct could provide a model for the Bendigo City activity centre. This model would require strong collaboration between the City, the arts community and local retailers. The Strategy notes the heavy investment by the City of Greater Bendigo in its cultural assets and its program of improvements to the public domain to showcase the built form heritage.

The Strategy also suggests low rent spaces in the city centre can be used for niche food and art venues (as per Melbourne's 'Creative Spaces' program).

The Bendigo CBD Plan supports action to encourage active frontages, creating more through site linkages and increasing access and safety in existing arcades.

EVIDENCE OF SUCCESS

It is apparent that the NTE that exists in Bendigo is not as well understood by its Council. In an article in the Bendigo Advertiser in April 2014, the Mayor of Bendigo was quoted as saying that late night trading for retailers would not be viable in Bendigo due to prohibitive penalty rates. He said that Bendigo doesn't have the population density of Melbourne and late trading would put retailers at a disadvantage. He is quoted as saying "Our trading is not good – Saturday afternoons and Sunday it all but ceases. It may be that Council are now more interested in how to "manage" the NTE, rather than necessarily plan for its growth. An article in the Bendigo Advertiser in August 2013 reported a 22.9% increase in assaults in 2012-2013 due mostly to alcohol and drugs. Bendigo police indicated increased patrols would occur in the peak spots of the CBD and around nightclubs.

LESSONS FOR PENRITH

- A strategy of retaining and enhancing high levels of urban amenity has resulted in increased demand to work and live in Bendigo. This has resulted in an increase in NTE activity, especially led by restaurants and live performances

- The issue of extending retail trading hours into the evening is difficult from a cultural and political perspective

- Any growth in the NTE activity needs to consider the associated growth in anti-social activity related to certain businesses and activities.e.g. around night club precincts.

CASE STUDY 3: LEXINGTON, KENTUCKY, USA

STRATEGIC POSITIONING

The Lexington-Fayette Urban County Government in 2008 published the 'Downtown Streetscape Master Plan for Lexington, Kentucky'. This plan recognised the reputation of the region as the "Horse Capital of the World". To protect the rural landscape and to position itself to be more competitive in the world economy, the Streetscape Master Plan noted the City has invested in improving the sense of place, environmental quality and economic potential of the Downtown. [20] It builds on recommendations from the 2006 Downtown Master Plan for the development of a more 'pedestrian oriented, vibrant streetscape environment' which was to be implemented in preparation for the 2010 FEI World Equestrian Games.

The World Equestrian Games (WEG) was seen as an opportunity to attract human capital and financial investment from outside local boundaries and establish Lexington's identity at a national and world level. WEG was credited with being the catalyst for a wave of redevelopments and improvements to downtown Lexington and significant investment from both the public and private sectors which continues today.

[20] Lexington-Fayette Urban County Government, August 2008. *Downtown Streetscape Master Plan for Lexington, Kentucky* accessed at http://lexingtondda.com/media/Lexington-streetscape-master-plan.pdf

A presentation to the Responsible Hospitality Institute Social City Leadership Summit by keynote speakers[21] entitled 'Kentucky, Lexington – Building Nightlife from the Ground Up' noted that prior to being award the World Equestrian Games Lexington had a limited nightlife, broken sidewalks and kerbs, unappealing public spaces and infrastructure in need of repair. The WEG resulted in a $201.5 million infusion into the Kentucky economy.

The authority driving development in downtown is the Lexington Downtown Development Authority (LDDA). Its mission statement is that it "promotes physical and economic development that strengthens and maintains downtown Lexington as the cultural and economic heart of Central Kentucky."

The LDDA describes Lexington in Fayette County, Kentucky as standing at the centre of an 'educational triangle' which includes the University of Kentucky campus, Transylvania University and the two campuses of the Bluegrass Community and Technical College with over 43,000 students enrolled in the city which provides a younger demographic to the downtown area. All three institutions have commenced expansion.

There are also three hospitals, a range of office spaces, government services and hi tech industries. A variety of housing types exist in the downtown area from urban lofts and dorms, to apartments and stand-alone houses. The downtown is described by the LDDA as a walkable city. The universities and key attractions such as the Lexington Convention centre are within a 10 minute walk from the centre of the city.

The 172 bars and restaurants in the CBD and surrounding neighbourhoods have been identified by the LDDA as key factors in the downtown renaissance. Sidewalk cafes have developed since 2010. There are also more than 20 studios and galleries, six theatres, 18 live music venues, nine local museums and over 70 outdoor festivals. The CBD also has the outdoor Fifth Third Pavilion which holds farmers markets on Saturday mornings and Thursday Night Live each week.

[21] Armstrong, K and Jackson, R 2014, *Kentucky, Lexington – Building Nightlife from the Ground Up* accessed at http://rhiweb.org/webinar/2014/lexington.pdf

The Lexington Convention Centre includes the Rupp Arena sporting complex and the Lexington Opera House. The downtown also contains a long established bourbon distillery combined with a visitor centre and new craft distilleries in the emerging distillery district.

Recent developments include the adaptive re-use of several historic buildings, one combining a boutique motel, contemporary art museum and restaurant and the other as a retail outlet.

THE NIGHT TIME ECONOMY IN LEXINGTON

Lexington's night life is a diverse mix of attractions for a wide range of people. It includes not only bars and restaurants but theatres, night time markets and sporting events.

Like many US cities, a city of downtown precincts has evolved based on distinct themes and specific characteristics. The main districts include:

- the Short Street restaurant district, which contains over 20 restaurants within three city blocks and is in close proximity to the remodelled retail precinct of The Square.
- the Jefferson Street precinct, which is an historic part of the downtown area to the west of the Centre, which hosts restaurants, bars, a European-style deli, and adaptive re-use of a historic building for a craft beer distillery/tap room.
- the Limestone North district, which is another historic area containing art studios, restaurants and the weekly Friday Night Street Fair, as well as a monthly Night Market described as a pop-up street festival.
- the Limestone South district, which is a corridor to the university containing a variety of international cuisine restaurants and bars.
- the National Avenue district, formerly the warehouse district, has become a corridor to the CBD containing boutique bakeries, a beer hall, brasserie, barbeque pit and fitness studios. This district's nightlife scene now also includes nine bourbon bars, six theatres and 18 live music venues. Thursday Night Live is a weekly, family friendly music event sponsored by the Central Bank.

NIGHT TIME ECONOMY STRATEGY

The 2006 ‘Downtown Lexington Masterplan – Envisioning the Future’ was developed for the Lexington Downtown Development Authority and the Office of Planning. The report was the result of workshops, public meetings and neighbourhood walks aimed at guiding revitalisation of the downtown district, maximising private investment and enhancing public domain. The local business community raised the funds to develop the Masterplan to be implemented through a combination of public and private finance. Goals outlined in the Masterplan were:

- The downtown shall be a place that unifies and supports the adjacent neighbourhoods, where both residents and visitors, at work or play, feel connected and responsible.
- The downtown area shall exemplify the region’s unique character and beauty, with civic spaces in which people feel comfortable coming together.
- The downtown area shall include plentiful spaces for human interaction that are memorable, safe, and of a commercial, residential and cultural benefit.
- The downtown shall be a place of common vision and physical quality and predictability for all new building, to ensure security of investment for property owners and developers as well as an aesthetic experience for users.
- The downtown shall nurture pedestrian life within the public realm while accommodating vehicular traffic.

The 2008 ‘Downtown Streetscape Master Plan’ builds on the 2006 Downtown Masterplan in developing streetscape guidelines which ‘enhance the public realm, redefine the pedestrian right-of-way, instill a stronger sense of place, and promote a higher quality of life . .’

The Lexington Downtown Development Authority, whose board is made up of representatives from the Lexington-Fayette Urban County Government, the university, community groups and public utilities and business continues to drive investment in the revitalisation of the downtown district.

In addition, Lextran, Lexington Transport Authority connects the downtown area to the neighbourhoods surrounding the city with a variety of buses, trolley cars and shuttle bus services.

EVIDENCE OF SUCCESS

The presentation by Lexington keynote speakers to the Responsible Hospitality Institute, Sociable City Summit reported that prior to 2010 there was a limited night time economy in Lexington. After a concerted effort by private and public sectors with significant investment in the streetscape, parks and new venues the city is reported to now have a thriving night time economy.

There are now 172 restaurants and bars within the CBD providing a range of dining and entertainment options. The arts and culture industry contributes $18.6 million annually to the local economy.

An average of 7,639 pedestrians walk through the downtown outdoor pavilion on a Saturday night and attendance at Thursday Night Live has gone from between 200 and 500 hundred people per week prior to 2010 to an average of 2,300 since 2010.

The number of police patrolling has increased but their role has reportedly changed from that of responding to incidents to ‘concierge policing’ – policing with a customer service orientation.

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