



Environmetrics
social and market research

Report

Redfern Business Precinct Study

Prepared for City of Sydney

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Environmetrics Pty Ltd

ABN 61 003 546 192

144-148 Pacific Highway, North Sydney, NSW 2060

Locked Bag 2116, North Sydney, NSW 2059

Report contact

Gillian Savage Environmetrics

Report contributors

Gillian Savage Environmetrics
Ilona Van Galen City Marketing

Report details

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1. Executive Summary

1.1 Study Brief

Environmetrics and City Marketing were commissioned by the City of Sydney Council to undertake a study of the Redfern Business Precinct, centred on the Redfern town centre. The objectives of the study were to gather information on the dynamics of the Redfern Business Precinct, examine issues affecting the viability of the Precinct and make appropriate recommendations for strategies and actions to promote and enhance the Precinct. A secondary aim of the study was to foster better relationships and communication between local businesses, Business Associations and the City of Sydney.

The study followed a major street upgrade of Redfern Street in 2007, and focuses on the next steps in revitalising the economy of the area.

1.2 Study Location + Character

The Redfern town centre, which is the subject of this study, comprises Redfern Street (between Chalmers Street to Regent Street) and Regent Street (between Cleveland Street and Henderson Road/Raglan Street).

Redfern is located about 3km from the Sydney CBD and it is bisected by the main railway line and two one-way streets (Regent and Gibbons Streets). Redfern is close to the University of Sydney and to the urban renewal areas of Alexandria and Waterloo.

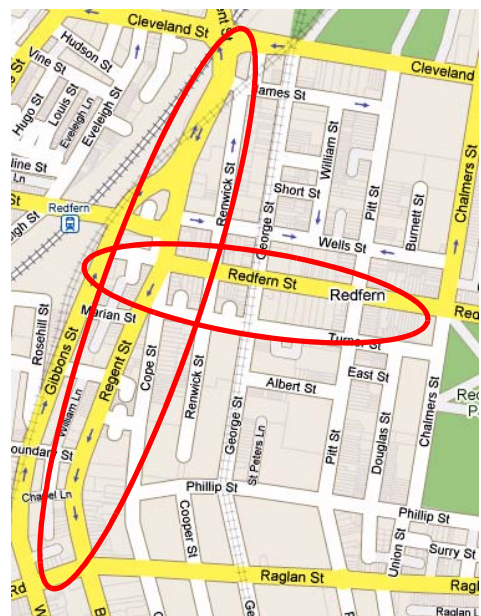
The Redfern-Waterloo area is the traditional home of the Gadigal Clan of the Eora Nation.

After WWII, Redfern, along with other inner suburbs, declined when the aspirations of new generations were realised in new suburbs that offered free standing houses on quarter acre blocks. The urban renewal of inner suburbs that started in Paddington in the 1970s reversed this trend and in recent years Redfern has benefited from this shift as terrace houses are renovated and medium density housing replaces industrial sites.

Redfern is a centre of major significance to Aboriginal people who have a strong association with the area and contribute to its sense of identity.

The Council undertook a Floor Space Employment Survey in 2006 and the data for the study area was analysed by Environmetrics. It was found that there was a total of 300,673^{sqm} floorspace comprising 217 operating businesses and 65 vacant premises, giving a vacancy rate of 23%.

Businesses in the study area employ 1,833 people of which retail trade comprises 12% of jobs. Government, Police, Charities and Health/Community services dominate the



employment profile. In contrast, Glebe businesses employ 1,555 people, of which retail trade comprises 56.4%, and Newtown businesses employ 3,490 people of which retail trade comprises 58.9%

The Redfern Business Precinct comprises four zones which can be characterised as:

Zone 1. Food and functional shops on Regent Street and Raglan Street, centred around the IGA supermarket.

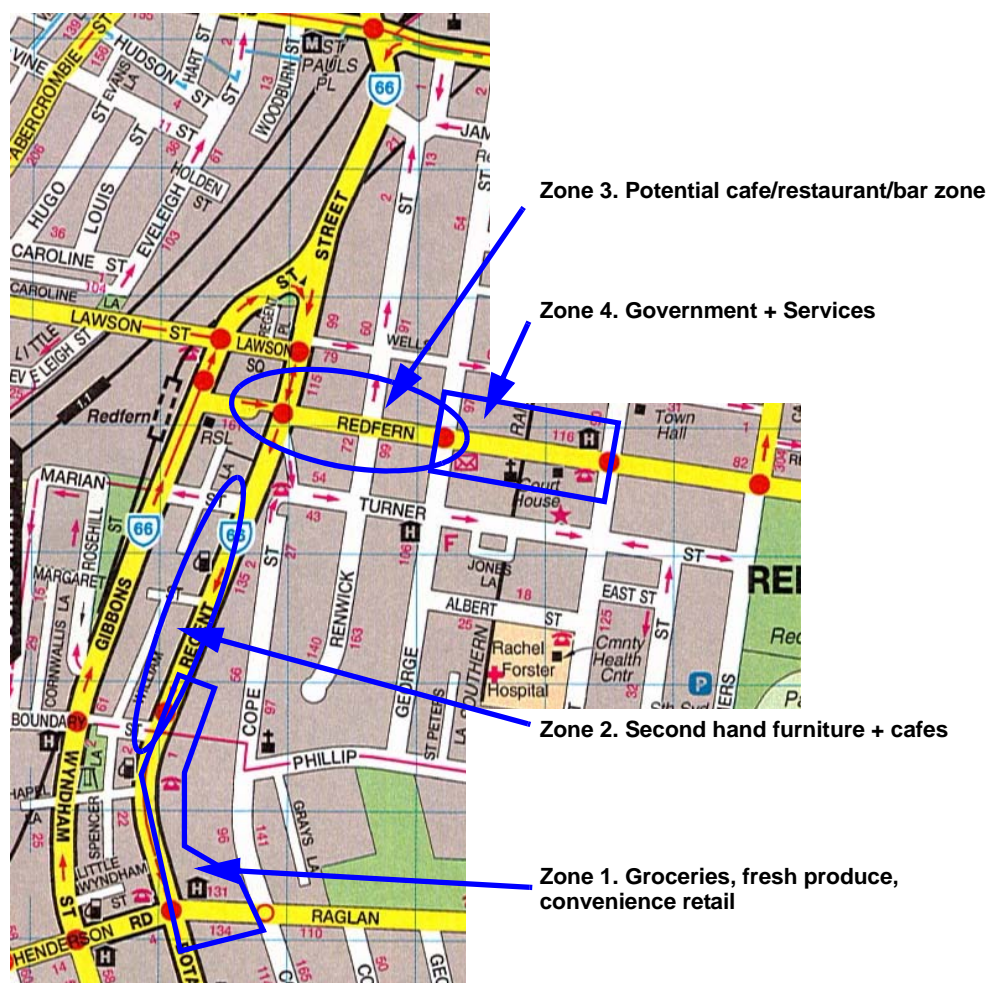
Zone 2. Second hand furniture and cafes on the Western side of Regent Street.

Zone 3. Redfern Street – the section between George and Regent Street has the potential to develop into a cafe/restaurant area operating during the day and evening.

Zone 4. Redfern Street – the section between George and Pitt Street has a cluster of Government, Community and Employment service organisations.

Each of these Zones can be described as 'emergent', and each one has considerable scope for enhancement and growth.

Fig 1. Retail zones in study area



1.3 Key Findings of the Study

Shopper Study – 205 shoppers on Redfern Street and Regent Street

- Most shoppers lived, worked or studied locally and were in the shopping precinct specifically to use one of the business. 'Convenience' was the main reason given for using shops and businesses in Redfern.
- Most shoppers had walked to the Redfern retail precinct and most (80%) stayed less than an hour.
- The high proportion (89%) of locals who walked to the business area shows the extent to which trade is confined to a very local catchment area. It is likely that to some extent current trade is limited to those who are unable to go elsewhere.
- Both locals and non-locals had a mixture of positive and negative impressions associated with Redfern. The positive impressions can form a basis for positive stories about the business area. Locals had a particular appreciation for the multicultural character and diversity of the area.
- Shoppers mentioned a number of limitations of the Redfern shopping area: the limited range of shops, need for Station upgrade and street cleaning, and concerns about personal safety, crime and beggars.
- Three priority areas were identified for future action:
 - Improve sense of safety + security
 - Improve Redfern image
 - Attract businesses to empty shopfronts
- The predominant feature that would encourage shoppers to use Redfern more was a wider variety of shops.
- For most categories of goods, the CBD was the predominant main shopping location, however Redfern was the main location for groceries and banking.
- The survey confirms that Redfern currently serves a very local catchment and that shopping activity is very limited (very short visits). The priorities for renewal are: wider diversity of shops, improved safety and security, and an improved image that is matched by the shopping experience.

Business Survey – 83 business returned survey forms

- The current business community is a stable one, they have operated in Redfern for a long time and one-third own their premises. Many are low-turnover businesses that see themselves as 'Useful and convenient' and 'Good value'.
- Most businesses, especially retailers, identified their customers as local residents, workers and students.
- Businesses favoured a future direction that focused on more businesses that provide basic services for locals, and more cafes, bars and restaurants.
- Businesses placed high priority on improving the sense of safety and security in Redfern, and attracting businesses to empty shopfronts.
- To attract more customers, they emphasised the need for better access (parking and transport), greater security, more specialty shops, reduced social problems on the streets and better image for Redfern.
- The survey confirms the strong localism of current business operations and the



urgent need to attract more shopfront businesses to the main trading streets.

Business Consultation – Three Forums

Local business owners identified the following priorities for improving the Redfern Business Precinct.

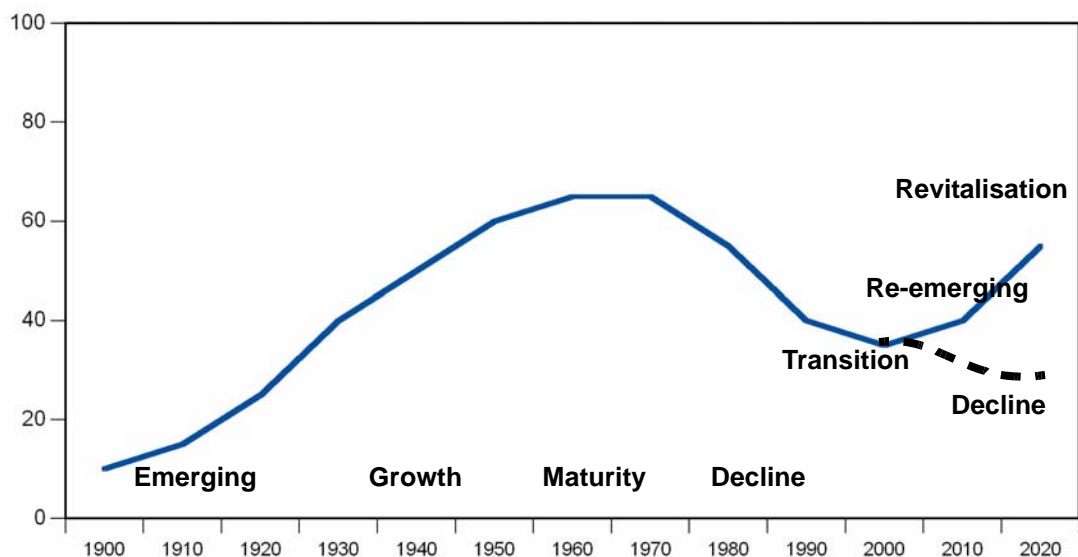
- Marketing and communication strategy
- Plan to address perceptions of safety
- Plan to reduce vacant frontages and increase the number of shops and businesses
- Tidy up shop fronts, remove shutters and external bars, and arrange temporary use of empty shops
- Traffic management to address parking and pedestrian access
- Convert Regent and Gibbons Streets to two-way streets
- Plan to address social problems (drunks, beggars, junkies, pilferers, etc.)
- Prepare program of events to attract visitors to the area
- Find ways to encourage Indigenous enterprises to establish in Redfern.

The third Business Forum endorsed the Vision and Six Action Steps outlined in this report.

1.4 Conclusions

This study notes that the Redfern Business Precinct is at a low point in the long term trading cycle, illustrated in the following graph. This situation indicates that economic renewal in Redfern will take sustained effort over several years, and that this effort will need to be adequately planned, resourced and managed.

Fig 2. Economic cycle of Redfern town centre



Current business activity in the Redfern town centre is restricted largely to basic goods and services for locals who find it inconvenient to go elsewhere. Renewal from this low base will require strong efforts to:

- support the businesses that already exist;
- seed a small group of related businesses (e.g. cafe/restaurant, creative arts) to form a cluster that can be the foundation of a new identity for Redfern.

This will form the core of a centre of gravity that will attract customers, and this in turn will attract more businesses, thus establishing a 'virtuous loop' dynamic with its own impetus for growth. It is likely to be several years before all elements are in place for this dynamic to take effect.

This study recognises that economic renewal depends on improvements across four domains –

- Physical setting – remove shutters, upgrade older premises, activate empty shopfronts, and initiatives to soften the public domain and encourage 'resting' places;
- Economic mix – attract wider range of businesses, building on the four precincts that are already emerging;
- Perception/image and communication – immediate and ongoing need for good news stories, and longer term Brand and Marketing Strategy; Calendar of Events and Signature Community Event;
- Business community, government and stakeholders – need for more resources to support communication and coordinate initiatives between these groups over several years.

Accordingly, this study recommends the following strategy to achieve these outcomes.

1.5 Recommended Strategy

The study has identified that local businesses and important stakeholders need to agree on a Vision for the character and focus of the Redfern Business Precinct. This study has proposed the following Vision which has the support of the Redfern Waterloo Chamber of Commerce.

Redfern will be known as an edgy, alternative, urban, gritty, artistic precinct with a specialty focus on Indigenous art, culture and enterprise.

The study has identified six strategies for working towards this agreed Vision.

Issue	Strategy
1. The Offer Redfern currently has a limited retail offer with restricted appeal. There is a high shop vacancy rate.	Prepare and implement a Targeted Tenancy Plan.
2. Image & Branding Redfern has a reputation for social problems and lack of safety.	Commission good-news Fact Sheet campaign and a Brand and Marketing Strategy.



<p>3. Physical Place</p> <p>Run down buildings and roller shutters detract from the amenity of the precinct. Parking is limited and one-way traffic on Regent Street and Gibbons Streets fragment the business precinct.</p>	<p>Remove shop shutters and activate shops with displays.</p> <p>Encourage property owners to upgrade/redevelop buildings.</p> <p>Enhance the public domain with 'soft' elements that encourage people to pause or stay longer.</p> <p>Review parking arrangements and develop strategies.</p> <p>Initiate discussions to remove the one-way traffic arrangements.</p> <p>Review planning instruments to avoid generic architecture and sub-optimal retail spaces.</p>
<p>4. Local Business Coordinator/Place Manager</p> <p>Local businesses have limited capacity to contribute to economic revival.</p>	<p>Consider the appointment of a Local Business Coordinator/Place Manager.</p>
<p>5. Events</p> <p>Redfern is perceived as still the same old problematic place.</p>	<p>Develop a unified calendar of events.</p> <p>Identify one new signature event that could encapsulate the vision for Redfern.</p>
<p>6. Social Character</p> <p>Social problems dominate perceptions of Redfern.</p> <p>Beggars and alcohol/drug-affected people interfere with shoppers.</p>	<p>Develop a communication strategy that tells the good news stories.</p> <p>Establish a cross-agency working party to consider ways to reduce negative effects on public domain.</p> <p>Review location of services to avoid negative impacts on business.</p> <p>Build on positives of local history and community, especially the Indigenous community.</p>



2. Project Background and Scope

2.1 Introduction

Redfern and Regent Streets are the traditional commercial strips of the Redfern town centre. While this has been a thriving retail centre in previous times, in recent years the area has become run down and decayed.

The City of Sydney *Sustainable Sydney 2030 Strategic Plan* identifies Redfern Street as an Activity Hub.

The NSW *Metropolitan Strategy* identifies Redfern as a Village with a commercial use.

There are several major urban renewal projects in and adjacent to the Redfern town centre that will impact it.

- The Australian Technology Park has grown into an employment and education centre.
- The Redfern Waterloo Authority has responsibility for coordinated development of an area encompassing the town centre.
- The North Eveleigh site will be redeveloped to provide a mixed-use precinct including workplaces, residential and community facilities.
- The Redfern Rail Station will be upgraded to improve access.
- The City of Sydney has implemented a major street upgrade in Redfern Street and Regent Street and upgraded Redfern Park and Oval.
- There have been a number of residential developments in Redfern which have added new apartments to the area, many of which have vacant retail spaces at ground level.

This weight of new development within and adjacent to the Redfern town centre will provide an impetus to the renewal of commercial activity. However, this impetus may have a muted impact on the town centre due to the disconnection between the western side of the railway line where Australian Technology Park (ATP) and North Eveleigh are located, and the town centre.

In addition, the commercial area is so extensively decayed that both time and resources will be required to rebuild in all respects – physical presentation, business expertise, cooperative networks and associated activities.

The Redfern Waterloo Employment Enterprise Plan (2006) notes that Redfern and Regent streets are under performing as the area's retail focus. These streets are not seen as pleasant to visit due to safety and security perceptions and, particularly in the case of Regent Street, are regional traffic arteries subject to clearway conditions and therefore limited parking provision.

The Employment Enterprise Plan notes the need for streetscape improvements and indicated that in the longer term increasing resident and worker populations will help to revitalise business in these streets. It also noted that:

Removal of regional traffic from Regent Street and reinstating two-way traffic movement would significantly reduce the detrimental impact of regional traffic on the retail precinct. The RWA in partnership with the Roads and Traffic Authority has developed proposals that



could revert Regent to two way, remove regional and heavy traffic off Regent Street and provide additional parking to service the businesses along Regent Street. While the RTA has not yet committed to this, the RWA considers the proposal to be feasible.

Redfern Waterloo Employment and Enterprise Plan 2006

The City of Sydney Sustainable Sydney 2030 Strategic Plan identifies Redfern Street as an Activity Hub which will provide a focus for community and transport.

Community hubs where shops, cafes, markets, libraries, government services and employment are centrally located within walking distance of every City resident.

Sustainable Sydney 2030 Strategic Plan

Vibrant local communities and economies are an important direction in the Plan. The current study supports the following goals, articulated in the Plan.

- Create a network of Activity Hubs as places for meeting, shopping, creating, learning and working for local communities
- Maintain and enhance the role and character of the villages
- Develop and support the economic role of Activity Hubs
- Prepare an integrated cultural strategy, including community based events

The City of Sydney carried out a major refurbishment of Redfern Park and Oval in 2007-8. Major streetscape improvements were implemented by the City of Sydney in 2007. They involved new paving, light poles, street furniture, undergrounding of cables, pedestrian 'bump outs', revised parking arrangements, upgraded park at Cope Street Reserve and a major artwork at the corner of Redfern Street and Regent Street. During the upgrade, businesses along Redfern Street experienced considerable disruption.

Following the streetscape improvements, the current study was commissioned to gain an understanding of the dynamics of the Business Precinct and the issues that affect its economic viability. The study provides a set of strategies and actions for improving the economic vitality of the Business Precinct in the immediate future.

The study also helps build relationships between the Economic Development Unit of the City of Sydney and local business associations in order to provide support for the maintenance and vibrancy of the Redfern Business Precinct.



2.2 Project Methodology and Deliverables

This study involved the following key tasks.

- Inception meeting with Council representatives to discuss the scope, objectives, requirements and resources for the study.
- Analysis of the Floor Space Employment Survey provided by the City of Sydney.
- Review of policy and planning documents.
- Analysis of ABS census data.
- Consultation meeting with South Sydney Business Forum.
- Two consultation meetings with Redfern Waterloo Chamber of Commerce.
- Meetings with Redfern Waterloo Chamber of Commerce and Council representatives.
- Review of relevant Council documents.
- Survey of 205 shoppers conducted face to face.
- Survey of 83 businesses, by mail.

This report documents the information collected and present recommendations for future direction and next steps.



3. Situation Analysis

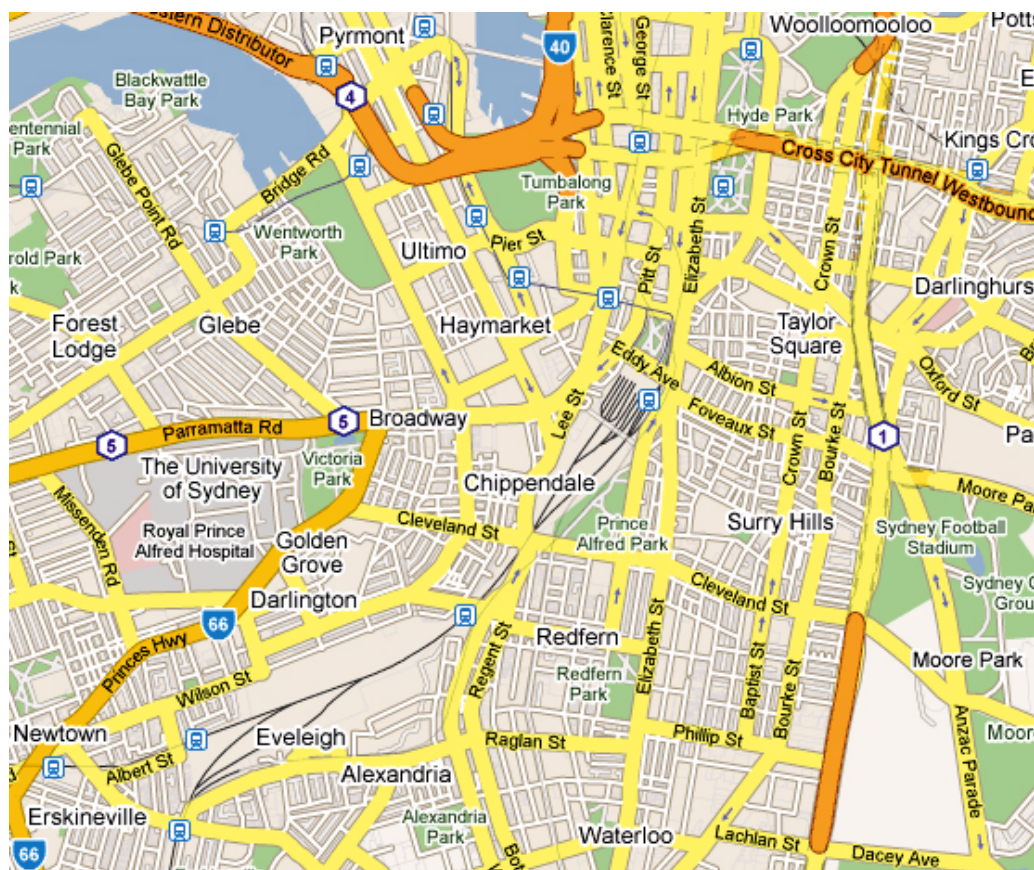
3.1 Physical, Social, Economic Situation

3.1.1 Geography

Redfern is located about 3km from the Sydney CBD. It is bisected by the main railway line. Redfern Station provides excellent accessibility due to the high number of services that stop here. Bus routes provide east-west and north-south connections through Redfern.

Redfern is close to the University of Sydney and to the urban renewal areas of Alexandria and Waterloo.

Fig 3. Map of Redfern and surrounds



The railway line separates the Redfern town centre from the commercial area at the Australian Technology Park (ATP) and North Eveleigh.

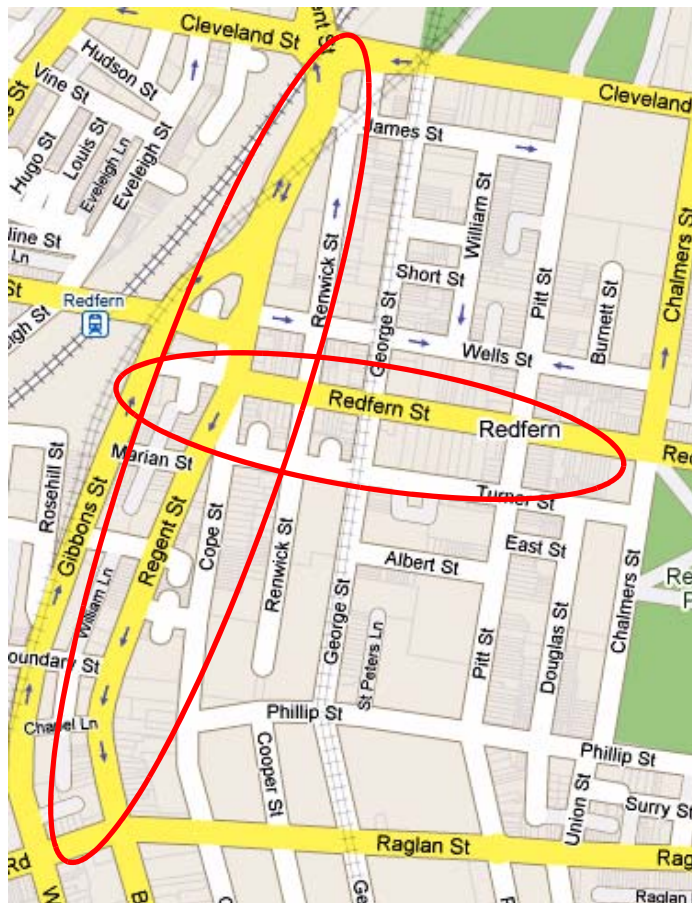
Regent Street and Gibbons Street are one way roads that encourage fast-moving through-traffic and form an additional barrier separating the Redfern town centre from activity on the other side of the railway line.



The Inner South community has the second highest population density in the City of Sydney, nearly nine times higher than the average for the Sydney metropolitan area.

The Redfern Business Precinct, which is the subject of this study, comprises Redfern Street (between Chalmers Street to Regent Street) and Regent Street (between Cleveland Street and Henderson Road/Raglan Street).

Fig 4. Study Area



Implications for Business Precinct

The Redfern Business Precinct is conveniently located in large catchment of potential users.

Train, bus and road systems provide good connectivity.

The railway line and the two one-way streets (Regent and Gibbons) separate the Redfern Business Precinct from businesses at ATP and North Eveleigh.



3.1.2 History

The Redfern-Waterloo area is the traditional home of the Gadigal Clan of the Eora Nation. Redfern is a centre of major significance to Aboriginal people who have a strong association with the area and contribute to its sense of identity.

Redfern has a strong industrial history dating back to the mid 1800s when it attracted industries such as tanneries, brickworks, wool washing and market gardens. Redfern Railway Station was built in 1855 and Eveleigh Railway Workshops drew workers to the area in the late 1800s. Terrace housing was constructed to provide housing for workers. During the 1920s, Aboriginal people were drawn to Redfern by the prospect of work on the railways as fettlers and the availability of cheap rent.

In the 1940s, Waterloo had 17,227 workers and Redfern 15,208 workers.

Due to the poor condition of housing in the mid 1900s, the County of Cumberland Plan (1948-1951) provided for houses to be demolished and replaced with high rise apartment blocks in a landscaped setting. This continued for several decades so that 55% of public housing in Redfern/Waterloo was built in the 1970s or later. The Department of Housing towers remain a strong built feature in the landscape and continue to reflect the very high proportion of public housing tenancies in the area. The concentration of public housing in Redfern and Waterloo is evident in the following table showing the percentage of all housing that is public housing.

Table 1. Public Housing as percentage of all housing

Redfern	29%
Waterloo	92%
NSW	6%

Source: Housing NSW 2006

After WWII, Redfern, along with other inner suburbs, declined when the aspirations of new generations were realised in new suburbs that offered free standing houses on quarter acre blocks. The urban renewal of inner suburbs that started in Paddington in the 1970s reversed this trend. In recent years Redfern has benefited from this shift as terrace houses are renovated and medium density housing replaces industrial sites.

The Redfern Waterloo Authority (RWA) was established in 2005 and has responsibility for revitalising the Redfern-Waterloo area through urban renewal.

In 2006, the Department of Housing strategy was to improve the match of public housing supply to demand by converting existing properties, more flexible allocation strategies and redevelopment where viable but without the loss of public housing. Ms Keneally, local MP and Minister for Ageing, Minister for Disability Services at the time, said the NSW Government was committed to ensuring that the amount of public housing in the Redfern-Waterloo area will not decrease¹.



1. Source: www.redwatch.org.au/media/061201sshk/

The buildings in the Redfern town centre reflect the history of the suburb. We see the fine civic buildings of the Town Hall, Court House and Post Office along with the neat rows of terrace houses from the nineteenth century. The post-WWII period has seen the construction of the Department of Housing towers and also the decay of older buildings in the Business Precinct.

Twenty years ago, Redfern had a strong business area based on Factory Outlet shops that attracted customers from the wider metropolitan area. Most of these shops have closed in the past 15 years, due to increased competition from outlets in Alexandria and purpose built centres. Other businesses have not moved into Redfern, leaving empty premises and no commercial 'offer' to attract out-of-area customers.

At this point in time, the Business Precinct is at a very low point in the cycle of success and failure. Important steps on the upward path towards success have been taken by the City of Sydney through recent investments in upgrading the public domain. It is likely that the upward path will extend across some years for several reasons:

- The current situation of the Business Precinct is extremely limited and there are entrenched views about Redfern that will take time to dissolve.
- The development of the business area will depend on simultaneous efforts on several fronts including the physical environment, the offer (new businesses), promotion of the area and growth of mutual supports among business and community. These improvements are inter-dependent and no single action will be sufficient in itself.
- The context for business development is a fluid one as major changes in local population and adjacent business areas unfold.

Implications for Business Precinct

The current environment of rapid change due to major redevelopment projects may create a unsettled trading environment with some uncertainties for local businesses.

The improvement of the Redfern Business Precinct should be seen as a long term project that will require clear vision and sustained resources over the coming years and decades.



3.1.3 Community profile

Key data from 2006 Census (ABS)

The following table outlines age, place of birth and education level for Redfern, Glebe and Newtown, compared with City of Sydney and Sydney SD.

Table 2. Population Characteristics 2006

	Redfern	Glebe	Newtown	CoS LGA	Sydney SD
Population	11,482	11,062	13,548	156,572	4,119,190
Males	56.1%	46.8%	50.3%	53.2%	49.2%
Females	43.9%	53.2%	49.7%	46.8%	50.8%
Age Distribution					
0-14	6.9%	9.9%	9.4%	7.2%	19.5%
15-29	25.0%	28.4%	31.8%	34.4%	21.2%
30-44	31.8%	25.9%	35.7%	31.0%	23.2%
45-59	18.3%	20.2%	14.7%	15.8%	19.3%
60-74	11.9%	10.8%	6.0%	7.9%	10.7%
74+	5.7%	4.8%	2.4%	3.6%	6.1%
Place of birth					
Australia & Oceania	49.7%	58.6%	58.1%	43.9%	63.1%
Europe	14.5%	9.3%	9.2%	8.4%	8.9%
Asia	10.8%	8.4%	7.5%	14.4%	10.6%
Americas	2.1%	1.5%	1.5%	1.3%	0.6%
North Africa + Mid East	2.1%	0.6%	0.4%	0.6%	2.5%
Sub-Saharan Africa	0.4%	0.3%	0.4%	0.5%	0.7%
Other/not stated	19.9%	21.3%	22.8%	30.9%	13.7%
Highest level non school education					
Post Graduate Degree	8.2%	13.7%	11.3%	9.8%	7.1%
Graduate Diploma / Certificate	2.9%	3.4%	3.8%	2.4%	2.3%
Bachelor Degree	27.6%	32.5%	36.1%	29.8%	25.5%
Advanced Diploma / Diploma	11.4%	9.5%	9.8%	9.9%	14.1%
Certificate	14.0%	11.4%	10.6%	10.0%	26.0%
Not State / Inadequately Described	35.8%	29.4%	28.4%	38.0%	24.9%

Source: ABS Census 2006

Key points to note from ABS Census:

- In the 2006 Census, there were 11,482 persons usually resident in Redfern.
- There were slightly more men (56%) than women (43%), especially in comparison



with Glebe, Newtown and Sydney SD.

- There was a higher proportion of people aged 30-44 years, especially compared with Glebe and Sydney SD.
- There was a smaller proportion of Australian-born residents compared with Glebe, Newtown and Sydney SD.
- Education levels appear to be somewhat lower in Redfern, but differing levels of 'not stated' tend to cloud the data.
- 2.4% were Indigenous persons, compared with 1.1% Indigenous persons in Sydney SD.
- 55.9% spoke only English at home. The most common languages other than English spoken at home were: Cantonese 3.0%, Russian 2.4%, Greek 2.4%, Mandarin 2.2% and Arabic 1.7%

Table 3. Dwelling and Household Types 2006

	Redfern	Glebe	Newtown	CoS LGA	Sydney SD
Home Ownership					
Owned or Being Purchased	30.0%	32.8%	42.0%	35.3%	65.0%
Rented	48.2%	63.0%	55.2%	60.7%	31.3%
Other/Not Stated	21.9%	4.2%	2.8%	4.0%	3.7%
Household Structure					
Family Households	43.3%	49.5%	47.6%	45.0%	72.7%
Lone Person Households	42.4%	40.4%	36.9%	41.2%	23.1%
Group Households	14.4%	10.1%	15.5%	13.8%	4.2%
Family Type					
Couple family with children	22.4%	25.9%	29.0%	22.1%	49.3%
Couple family w/o children	58.8%	49.1%	56.3%	59.7%	33.2%
One parent family	14.7%	20.6%	11.5%	12.3%	15.6%
Other family	4.1%	4.5%	3.1%	5.8%	1.9%
Dwelling Type					
Separate house	1.4%	14.4%	6.7%	5.3%	63.6%
Terrace/townhouse	30.6%	41.4%	56.4%	22.4%	11.8%
Flat-Unit-Apartment	66.4%	42.5%	34.1%	71.0%	23.9%
Other dwelling	1.3%	1.6%	2.6%	1.1%	0.6%
Not stated	0.4%	0.1%	0.1%	0.2%	0.1%
Usual Residence Last 5 Years					
Same Usual Address as 5 years ago	34.7%	39.1%	30.6%	25.6%	56.4%
Different Usual Address in the last 5 years	45.2%	44.8%	50.6%	49.3%	35.7%
Not Stated	20.1%	16.1%	18.8%	25.1%	7.9%

Source: ABS Census 2006



Key points to note from ABS Census:

- Redfern has a similar proportion of lone person households to Glebe, Newtown and City of Sydney LGA, and substantially lower than Sydney SD.
- It is similar to Glebe in the proportion of families with children, and substantially lower than Sydney SD.
- Redfern has a much higher proportion of Flat/Unit/Apartment dwellings than Glebe, Newtown and Sydney SD.
- A high proportion of landlords in Redfern were State housing authorities.
 - 45.3% were rented from a real estate agent (Australia = 50.5%)
 - 38.0% were rented from a State or Territory housing authority (Australia = 14.9%)
 - 14.8% were rented from other landlord type.
- In terms of mobility, the Redfern population appears to be similar to Newtown and Sydney LGA, and much more mobile than Sydney SD.

Table 4. Employment and Income 2006

	Redfern	Glebe	Newtown	CoS LGA	Sydney SD
Labour Force					
Managers	14.6%	13.5%	13.7%	15.4%	12.5%
Professionals	34.4%	37.0%	39.1%	34.8%	22.5%
Community & Personal Services Workers	9.4%	7.6%	8.3%	8.7%	7.6%
Clerical and Administrative Workers	14.6%	14.3%	13.9%	13.3%	15.8%
Sales Workers	7.8%	7.6%	6.9%	7.9%	9.0%
Technicians & Trade Workers	8.8%	6.1%	7.2%	7.1%	12.0%
Machinery Operators & Drivers	2.8%	1.9%	1.8%	1.8%	5.7%
Labourers & Related Workers	5.4%	3.9%	3.1%	4.1%	7.6%
Inadequately described or N.S.	2.2%	1.9%	1.3%	1.8%	2.0%
Unemployed	5.5%	6.1%	4.7%	5.3%	5.3%
Weekly Household Income					
\$0-\$399	22.9%	20.0%	11.6%	16.7%	12.8%
\$400-\$799	13.2%	16.4%	14.1%	13.5%	17.9%
\$800-\$1,399	16.5%	16.9%	19.5%	18.0%	20.8%
\$1,400-\$2,499	18.7%	16.3%	23.0%	20.2%	21.2%
\$2,500+	17.7%	20.3%	22.0%	21.9%	16.0%
Partial income stated	7.1%	6.9%	8.0%	7.2%	8.6%
All incomes not stated	3.9%	3.1%	1.7%	2.5%	2.7%
Median Weekly Household Income	\$1,083	\$1,068	\$1394	\$1,204	\$1,154

Source: ABS Census 2006



Key points to note:

- Level of unemployment is similar to City of Sydney LGA and Sydney SD
- Strong proportions of Managers and Professionals compared with Sydney SD
- Median weekly household income is lower than City of Sydney LGA and Sydney SD.
- Of people in the labour force:
 - 69.8% were employed full-time
 - 20.7% were employed part-time
 - 5.5% were unemployed.
- The most common industries of employment were:
 - Cafes, Restaurants and Takeaway Food Services, 4.8%
 - Tertiary Education, 3.2%
 - Legal and Accounting Services, 3.0%
 - Architectural, Engineering and Technical Services, 2.8%
 - Auxiliary Finance and Investment Services, 2.8%
- Although individual incomes in Redfern were higher than the national average (Redfern \$630: Australia \$466), household incomes were the very similar to the national average (Redfern was \$1,083, compared with \$1,027 in Australia), but lower than City of Sydney LGA and Sydney SD.

Residents living in the Waterloo and Redfern public housing estates add to the area's character and vitality. More than 40 per cent of these residents have a non-English speaking background. Many are elderly Russian, Chinese, Vietnamese, Arabic, Spanish or Greek speaking women. Redfern also has a notable gay and lesbian community, and a notable number of young families.

Implications for Business Precinct

Managers and Professionals predominate amongst local residents who work, and this indicates an opportunity for local businesses.

The Redfern Business Precinct serves a large local community of low income people with considerable cultural and social diversity.

It is important that commercial services in the business area continue to meet the needs of these community members.



3.1.4 Social Issues

Compared to the Sydney region the Redfern-Waterloo area experiences higher levels of economic and social disadvantage. This is attributed to lower incomes, education, home ownership and labour force participation, high levels of unemployment and public housing occupancy.

To meet the special needs of these community members, Redfern has many Government and private service organisations. In 2007, Helen Campbell listed 34 community service organisations in the Redfern Waterloo area. In addition, Centrelink and associated Employment Service Providers comprise a prominent cluster of businesses in Redfern Street.

It is clear that these services are essential in this community. However, in a typical retail precinct prime locations attract higher rents and service organisations choose to occupy secondary locations. This is a natural dynamic with a feedback loop which means that businesses that depend on high passing traffic will occupy prime locations if they can generate the revenue to pay the rent. Generally, businesses that are not dependent on passing traffic will occupy secondary locations because it will be inefficient for them to pay the rent at prime locations.

When service organisations occupy prime retail locations, as they do in Regent Street (see Fig 9), they often offer unappealing facades because they do not need to attract passing traffic. This has a negative impact on street appeal to pedestrians and impedes the development of a vibrant retail centre.

While many social support services can co-exist harmoniously with retail business, there are some services that may have negative effects on nearby businesses. An example that was raised in this study was the proposal to locate an injecting room on Redfern Street when the Community Health Centre is relocated. Local business and community members held the strong view that injecting rooms bring users whose behaviour and example often undercut the appeal of the locality for shoppers, visitors and residents. They noted that the negative impact of injecting rooms is recognised in restrictions on location with respect to schools, and that the same principle should apply to retail precincts that depend on passing foot traffic for their business.

Place making principles recognise the need to identify conflicting uses and address them separately. For example, active and passive uses are catered for separately in planning for outdoor spaces. A town centre that is intended to function as an inviting place for the whole community is likely to be compromised by the presence of an injecting room that has the capacity to deter many community members.

The housing renewal that is underway in Redfern is changing the profile of the local community by attracting young professionals and other middle-income groups. This has the potential to result in the 'gentrification' of Redfern and this may alienate current community members. Another possibility is that the new residents may avoid the Redfern Business Precinct in favour of nearby shopping precincts such as Newtown, Broadway or Danks Street. Neither of these alternatives would benefit the Redfern Business Precinct in the longer term.

Surveys conducted by Environmetrics of Redfern shoppers and businesses indicated that three major issues related to social disadvantage are currently limiting retail success:



- antisocial behaviour in the public domain (beggars; drug/alcohol affected; mental illness; graffiti)
- personal safety (assault)
- crime (stealing, pilfering).

Implications for Business Precinct

It is important to balance the needs of socially disadvantaged community members with the needs of new residents so that the Business Precinct appeals to the broad spectrum of the local community and meets their needs in an efficient and effective manner.

Local businesses should work with Police and Council to implement strategies to counter safety/security issues, including actual and perceived issues.

The potential impact of locating an injecting room within the retail precinct should be examined carefully. Considerable thought should be given to the social benefits that will result from a thriving Business Precinct in Redfern and the social costs of failing to achieve this.

3.1.5 Economic Development

The Redfern-Waterloo Authority (RWA) is responsible for revitalising Redfern, Waterloo, Eveleigh and Darlington through urban renewal, improved human services and job creation. As well as overseeing development within its defined operational area, the Authority is the consent authority for eight specified State Significant sites within the operational area. The study area comes within the RWA operational area.

There are several major redevelopment sites in or adjacent to Redfern, including: Australian Technology Park (ATP), North Eveleigh and South Eveleigh.

The City of Sydney Economic Development Unit has overseen Precinct Development Strategies to guide and support economic development.

Recent commercial development initiatives in the area include:

- Redfern Street upgrade to improve the streetscape, and make it much more attractive and usable.
- Redfern Oval and Redfern Park redevelopments underway in 2007-08.
- A new tenancy (Group Colleges Australia) in 10 levels of old TNT building will bring about 1,000 students to English language classes from March 2008.
- A new research facility at ATP will see 600 employees of National ICT and Defence Science Australia relocate in early 2008.
- Construction of a media facility at ATP will become operational in late 2009 with around 700 workers at the Seven Network, Global Television and Pacific Magazines.
- Redfern Courthouse and Police Station will house a Community Health Centre.
- \$45 million will be invested by the Indigenous Land Corporation (ILC) to purchase and transform the former Redfern Public School into a new National Indigenous Development Centre.



- The Rachel Forster Hospital will be redeveloped to provide 150 dwellings.
- The Redfern RSL is proposing a \$35million upgrade to club headquarters comprising new club headquarters and 10,000 sqm of commercial space on their prime site directly opposite Redfern Railway Station.

These developments have the potential to impact the Redfern Business Precinct in both direct and indirect ways:

- New workers at ATP or Eveleigh may be attracted to businesses in the Redfern Business Precinct if they offer a strong reason to walk or drive the distance, overcoming the barriers (real and perceived) of the railway line and general amenity of the streets along the route.
- New populations of students, workers and residents in the immediate vicinity of Redfern and Regent Streets may be attracted by the convenience of location.
- The upgrade of the public domain (streets and park) will support the Business Precinct by improving the general amenity of the area as a pleasant place to be.

Implications for Business Precinct

The Redfern Waterloo Authority has a major role to play in supporting the invigoration of the Redfern Business Precinct.

The Redfern town centre will be restricted to a very local catchment unless businesses that can draw customers from beyond the immediate area are established in the Precinct.

The new developments at ATP and Eveleigh will not benefit the Redfern Business Precinct, unless there is strong planning coordination and improved physical connections between the two locations.

New businesses in Redfern town centre will need to have a strong offer if they are to attract users from ATP and Eveleigh.

The City of Sydney recognises the contribution of local businesses to the life of the City. By helping to encourage and stimulate local business precincts, the City aims to build strong and animated local communities, activity hubs, create sustainable business and employment opportunities and address identified social issues within its communities.

In *Sustainable Sydney 2030*, Redfern is specifically identified as an action area in relation to the desire to plan for a new hub around Redfern Street (action 6.2.2) and to focus on the cultural and creative aspect of Redfern's activity hub (action 7.4.6).

The Economic Development Unit of the City of Sydney has a key role in understanding and promoting the economic development of the City.



In 2006, the City of Sydney carried out a comprehensive Floor Space Employment Survey. The following table shows the total number of jobs provided by businesses in three of the City's 'villages'.

Table 5. Number of jobs in local businesses

Redfern	1,833
Glebe	1,555
Newtown	3,490

Source: City of Sydney Floor Space Employment Survey, 2006.

The following table shows the Redfern employment figures for major Industry Divisions.

Table 6. Employment (FTE) Profile of Business

	Redfern		Darlinghurst	
	No.	%	No.	%
Accom, Cafes & Restaurants	107	6.9%	444	9.4%
Business Services	220	14.3%	807	17.1%
Communication Services	10	0.6%	160	3.4%
Construction	6	0.4%	3	0.1%
Cultural & Recreational Services	38	2.5%	96	2.0%
Education	10	0.6%	214	4.5%
Finance & Insurance	67	4.3%	74	1.6%
Government Admin & Defence	354	23.0%	1768	37.5%
Health & Community Services	103	6.7%	150	3.2%
Manufacturing	86	5.6%	69	1.5%
Mining	10	0.6%	50	1.1%
Personal & Other Services	352	22.8%	256	5.4%
Retail Trade	149	9.7%	463	9.8%
Transport & Storage	22	1.4%	128	2.7%
Wholesale Trade	8	0.5%	28	0.6%
Total	1542		4710	

Source: City of Sydney Floor Space Employment Survey, 2006.

The data indicate that Redfern has a relatively narrow profile of employment types. The main employers are Government, Administration and Defence (23.0%); Personal and Other Services (22.8%) which in Redfern is dominated by 245 jobs in Registered Charities and Police; and Business Services (14.3%).

Only (16.6%) of employment is provided by shop front businesses like Cafes & Restaurants and Retail Trade.



Implications for Business Precinct

There is scope for increased employment in the retail, business services and hospitality sectors that are vital to a thriving commercial precinct.

The preponderance of employment in government and service agencies reflects the social disadvantage of the area and the magnitude of the task of revitalising commercial activities in the Business Precinct. This is a task that will require clear strategy supported by consistent effort that is resourced across several years.

This study recommends a multi-pronged strategy that starts with a clear vision for the quality and character of the Redfern Business Precinct. The first steps towards establishing this vision as a reality require: improved street appeal through upgraded business premises, a plan to attract appropriate tenants in a balanced retail mix, communication plan to broadcast positive messages, key events that attract the local community and others.



3.2 The Retail Setting

3.2.1 Physical Characteristics

The Redfern commercial centre extends along Redfern Street and Regent Street. The recent street upgrade has created a pleasant pedestrian environment on Redfern Street and helped to provide an area on Regent Street that encourages pedestrians to linger – the park, paving and artwork at the corner of Regent and Redfern Streets.

The upgrade has addressed paving, lighting, seating, tree planting and cleanliness.

Several new apartment buildings on Regent Street include street-level commercial space. In some cases, these shop fronts have been recessed or separated from the footpath and some are shielded by building support pillars or dividing walls.

Shop awnings on both Redfern and Regent Streets are intermittent, providing patchy shelter from sun and rain.

Many shops on both streets have external roller shutters that are closed outside business hours. Many unoccupied shops are permanently shuttered.

Built form in the commercial centre includes a mixture of 11 storey towers and two-four storey buildings, with some notable heritage buildings (Town Hall, Post Office and old Court House).

The Redfern-Waterloo Built Environment Plan describes the Redfern Town Centre as:

The centre lacks active uses at street level and is visually unappealing.

Redfern Waterloo Built Environment Plan

The Redfern-Waterloo Built Environment Plan notes:

Despite the extensive movement network, transport options and grid street system, connectivity for pedestrians and residents to some key destinations, such as the Redfern Railway Station, the Town Centre and between North and South Eveleigh is restricted. This is primarily due to the rail corridor, rail yards and major roads carrying through traffic. The result is a disconnected suburban structure and development sites enclosed by the transportation network.

Redfern Waterloo Built Environment Plan, 2006



Regent Street at Redfern Street



GCA Towers



On Redfern Street



In 'Great Streets'¹, Allan Jacobs outlines underlying principles for excellence in street design, and uses case studies of real streets for illustration. One key requirement of a great street is that it provides places for people to walk with some leisure based on personal safety, adequate space and interesting things to see. Another requirement is physical comfort with respect to shelter from wind, rain and sun.

The recent street upgrade in Redfern has gone a long way towards providing the fundamentals identified by Jacobs in 'Great Streets'. He identifies two features that are particularly relevant to Redfern – Special Design Features and Pausing Places along the way.

With respect to Special Design Features, there are opportunities to further soften the streetscape, especially Redfern Street, by including more elements such as benches, feature lighting, paint schemes, flower planters/baskets and art works. For example Ashfield Council has a very successful mural program² throughout the municipality. The murals are designed to not only beautify the area, but also deter graffiti.

The proposed Eora Journey project may provide a focus for introducing a number of softening elements including art, poetry, plantings, symbolism and connections, to the Redfern town centre.

In addition, the Council may consider further ways to incorporate Pausing Places along Redfern Street. A Pausing Place may be an intersection, a set back, small plaza or widening that fosters stops, pauses and reflection points along a path. The Memorial to Mum Shirl, and the new artwork at the corner of Redfern Street and Regent Street are examples of Pausing Places.

Implications for Business Precinct

There is considerable scope for further improvement of the physical aspects of the town centre. In particular, run-down and shabby business premises need upgrading to present a clean, cheerful and inviting presence.

Security shutters, grills and bars should be renovated to present a minimal visual impact.

Continuous shop awnings would provide all-weather protection for people using the town centre. They are particularly important on exposed corners.

There is an urgent need to activate empty shop fronts.

Elements that soften the streetscape in Redfern Street would improve the amenity of the street.

1. Jacobs Allan B., *Great Streets*, Massachusetts Institute of Technology. 1993.

2. Ashfield Council Mural Program. www.ashfield.nsw.gov.au/community_services/Murals.htm



3.2.2 Transport and Parking

Redfern Railway Station provides ready access from outside the area. The station is the tenth busiest in the metropolitan network with 31,000 movements on a typical week day. More Citirail suburban and inter urban trains stop at Redfern Railway Station than any other station, with the exception of Central, providing Redfern with excellent accessibility.

RailCorp indicates that over 55% of commuters walk to the station and about 37% travel by bus.

RWA and Railcorp have commenced a major upgrade of Redfern Station to provide:

- Enhanced station access, including access for families with prams, the elderly and people with disabilities;
- Increased capacity;
- Improved entry and better connection with the surrounding area; and
- More efficient interchange facilities for passengers.

Redfern is will served by bus routes providing regular services to Sydney CBD.

Regent Street and Gibbons Street are one-way streets that carry large volumes of traffic.

The Redfern-Waterloo Built Environment Plan notes:

The Redfern-Waterloo area channels significant volumes of regional traffic and people to other destinations in Sydney, rather than being a key destination. Currently, large volumes of regional traffic travelling north-south along Gibbons and Regent Streets physically dissect the Redfern Railway Station from the Redfern Town Centre area. This limits physical connections, restricts pedestrian movement and reduces pedestrian safety.

The Department of Planning has advised that over the next 10 years traffic in the Sydney CBD to Airport corridor is anticipated to increase by 20,000 road trips in the morning peak. The continuing strong growth in the movement of vehicles and trucks through the Airport and Port Botany will increase traffic on the regional transport network. Without any action to address the increasing traffic from the Airport and Port Botany, regional traffic will continue to increase through Redfern-Waterloo impacting on pedestrian amenity and safety. Unless carefully managed, this will continue to negatively impact on the already poor business environment along Regent and Gibbons Streets and reduce the pedestrian amenity.



Group Colleges Australia information



Regent Street



Implications for Business Precinct

The business environment on Regent Street could be improved dramatically by converting Regent and Gibbons Streets to two-way streets. This would allow Regent Street to reach its potential as a pleasant street for pedestrians to browse and linger.

The proximity to Sydney CBD along with frequent rail and bus services are strengths for businesses operating in the Redfern town centre.



3.2.3 Buildings

Heritage qualities

Redfern has a number of fine landmark buildings dating from the nineteenth century. These include the Town Hall, Post Office and Court House.

Fig 5. Landmark buildings



Redfern Town Hall, Post Office and Court House

The streets are also notable for numerous modest nineteenth century terrace houses that have potential for considerable charm. Some premises have made use of this potential by converting small cottages to commercial use, or by preserving the decorative details of upper floors as illustrated by these images of properties in Redfern Street.

Fig 6. Redfern Street premises with heritage charm



Despite some examples of good practice, many of the older buildings on Redfern Street and Regent Street are in a state of disrepair and neglect.

Fig 7. Run down and neglected premises



Notwithstanding some neglect, it is apparent that many of the older buildings on both Redfern and Regent Streets have strong potential for refurbishment that would contribute to a very attractive streetscape with historic qualities. A Terrace Pattern Book similar to that prepared for Pyrmont could provide encouragement and assistance to Redfern landowners to renovate neglected terrace houses for adaptive reuse for retail purposes.

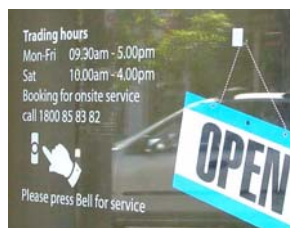
Fig 8. Regent Street properties with potential for refurbishment



Shuttered and locked

The consultants observed that many shops currently present a 'closed' front to the street, either through roller shutters, locked doors or other security measures. These measures present an unwelcoming face and raise concerns about personal safety.

Fig 9. Locked, shuttered and barred shops



Buzz to enter shop



Shutters closed



Variety of window bars

Bland and undistinguished

Regent Street has a number of new buildings comprising residential apartments above retail spaces at street level. In general, the new shops in modern buildings are bland and undistinguished. In many cases, the shops are recessed from the street and have pillars, walls or changes in level that impede easy access.

The following images of new shops on Regent Street give a clear indication of the degree to which some of these shops are isolated from the street. Some recesses (e.g. the first example below) may be conducive to cafes that could bring life to the recessed area with tables and chairs, but in other cases the set-backs act as a barrier to access.



Fig 10. New shops on Regent Street



The one-way traffic and limited parking on Regent Street, and the lack of continuous shop awnings detract from the environment for outdoor dining.

Local business owners have commented that the very small sizes of some retail spaces (c.45-60 sqm) may limit the business potential of these properties.

Implications for Business Precinct

It is vital that run-down business premises in the town centre are upgraded, well-maintained and kept clean.

There is potential for many of the nineteenth century terrace houses to be upgraded and adapted for commercial use. A Terrace Pattern Book could help encourage this process.

Planning requirements that are designed to activate streets should be reviewed to ensure they are delivering commercial spaces with the fundamentals of market appeal in terms of size, location and connection to the street.

Planning requirements and the approval process should encourage new buildings that add distinctive character to the area and avoid the proliferation of bland and generic architecture.



3.2.4 Business Overview

In 2007, the City of Sydney undertook a comprehensive Floor Space Employment Survey and provided the consultants with data for the Redfern area.

The study area provides 300,673^{sqm} of floor space of which 118,521^{sqm} is non-residential. It comprises 217 occupied businesses.

This data allows for a range of comparisons between four study areas: Redfern, Darlinghurst, Glebe and Newtown. In this section we show the data from these four areas to the extent that it was available to us. We had the full FES data for Redfern and Darlinghurst, and extracts from Glebe and Newtown.

Some of the differences shown in these comparisons reflect the differing profiles of the four areas, however, some differences may be due to the definition of the study area.

Size of study areas. It is notable that the Redfern study area is less than half the size of the Darlinghurst study area. In overall size, it is similar to Glebe and Newtown.

Redfern	300,673 ^{sqm}
Darlinghurst	755,799 ^{sqm}
Glebe	292,153 ^{sqm}
Newtown	419,696 ^{sqm}

Source: City of Sydney Floorspace and Employment Survey 2007

Private Households. The four areas have similar proportions of Private Households in the study areas with Glebe having the highest proportion of residential and Newtown the lowest.

Redfern	46%
Darlinghurst	47%
Glebe	56%
Newtown	37%

Source: City of Sydney Floorspace and Employment Survey 2007

Retail Use. The proportion of space given to Retail is lowest in Redfern and Darlinghurst, and highest in Newtown.

Redfern	4%
Darlinghurst	6%
Glebe	10%
Newtown	20%

Source: City of Sydney Floorspace and Employment Survey 2007

Vacant premises. The following table shows the proportion of vacant businesses in the four precincts.



Table 7. Occupied and vacant business establishments

	Redfern	Glebe	Newtown	Darlinghurst
Occupied businesses	217	245	780	632
Vacant establishments	65	43	112	81
Total	282	288	892	713
Percent	23.0%	14.9%	12.6%	11.4%

To gain a clearer picture of business activity in the study area, it is useful to look at the non-residential use of premises. This allows a closer look at commercial use along with uses such as health, education, utilities and services.

The following table shows the distribution of floorspace across major industry categories, excluding residential uses, for Redfern and Darlinghurst.

Table 8. Floorspace allocation (excluding residential) for Redfern and Darlinghurst

	Redfern		Darlinghurst	
	Sq Meters	Percent	Sq Meters	Percent
Vacant	23,301	20%	39,728	14%
Accommodation	-	-	21,029	7%
Business Services	13,237	11%	17,969	6%
Café + Restaurant	2,458	2%	13,541	5%
Communication	7,207	6%	2,706	1%
Construction	807	1%	248	*
Cultural + Creative	3,235	3%	5,274	2%
Education	1,357	1%	25,792	9%
Entertainment (pubs, clubs)	6,548	6%	19,677	7%
Entertainment (sport + rec)	-	-	4,969	2%
Finance + Banking	2,331	2%	1,615	1%
Government	8,440	7%	35,713	12%
Health + Community Services	5,658	5%	22,143	8%
Insurance + Superannuation	-	-	570	*
Manufacturing + Primary	9,098	8%	1,789	1%
Property Services	-	-	1,914	1%
Public Services	10,430	9%	11,658	4%
Retail - Automotive	3,524	3%	711	*
Retail - Food & Beverage	2,835	2%	12,108	4%
Retail - Home + Personal	8,338	7%	40,806	14%
Retail - Repair	256	*	89	*
Transport	8,093	7%	2,554	1%
Utilities	150	*	1,667	1%
Wholesale	1,530	1%	2,058	1%
	118,833		286,327	

Source: City of Sydney Floorspace and Employment Survey 2007

* less than 1%



This analysis shows the scale of vacant premises in Redfern, where one-fifth (20%) of non-residential floorspace is vacant, compared with 14% in Darlinghurst.

The data shows the relative strength of Darlinghurst in the areas of Accommodation, Cafes & Restaurants, Retail–Home and Personal, Government and Health/Community.

Redfern is relatively stronger in Business Services, Communication (Post/Telecommunications), Manufacturing, Public Services (Religious, Charity, Police) and Transport (Parking Services).

In terms of fostering a thriving main street commercial precinct in Redfern, this data shows that two types of business are less prominent in Redfern than in Darlinghurst.

- Retail – Home and Personal
- Retail – Food and Beverage
- Cafes and restaurants

This suggests that there may be opportunities to attract these kinds of businesses to Redfern.

The following table compares the number of businesses in Redfern and Darlinghurst.

Table 9. Number of businesses in Redfern and Darlinghurst

	Redfern		Darlinghurst	
	Number	Percent	Number	Percent
Accommodation	-	-	10	2%
Business Services	24	11%	102	16%
Café + Restaurant	21	10%	72	11%
Communication	3	1%	5	1%
Construction	2	1%	1	*
Cultural + Creative	9	4%	21	3%
Education	1	*	20	3%
Entertainment	6	3%	34	5%
Finance + Banking	3	1%	6	1%
Government	12	5%	5	1%
Health + Community Services	15	7%	25	4%
Insurance + superannuation	-	-	6	1%
Manufacturing + Primary	11	5%	4	1%
Property Services	-	-	11	2%
Public Services	14	6%	18	3%
Retail - Automotive	9	4%	5	1%
Retail - Food and Beverage	20	9%	51	8%
Retail - Home + Personal	56	26%	224	35%
Retail Repair	5	2%	2	*
Transport	3	1%	3	*
Wholesale	3	1%	7	1%
	217		632	

Source: City of Sydney Floorspace and Employment Survey 2007

* less than 1%



The data confirms that Redfern lags in proportion of businesses in key retailing and business sectors: Retail–Home + Personal, Business Services.

One-fifth (21%) of current businesses in Redfern comprise the service sector including Health, Community, Public and Government Services, and Employment services.

Of current businesses in Redfern, about 51% comprise retail shop fronts, while the remaining premises are occupied by service providers like Health and Community, Public and Government Services, Business Services as well as some manufacturing and wholesale businesses.



Service providers
offer blank facades
to Regent Street



The total floorspace occupied by retail and office businesses is 50,002sqm. The following table shows the breakdown of floorspace for the main types of retail and businesses for Redfern and Darlinghurst.

Table 10. Retail/Office Floorspace (sqm) in Redfern Business Precinct

	Redfern		Darlinghurst	
	Sq meter	Percent	Sq meter	Percent
Business Services	11621	23%	14080	12%
Communication	7138	14%	2706	2%
Pubs & Clubs	6210	12%	19677	16%
Retail Automotive	3524	7%	711	1%
Retail Food & Beverage	2835	6%	12108	10%
Cafes & Restaurants	2458	5%	13541	11%
All Services	2359	5%	8567	7%
Finance & Banking	2331	5%	1615	1%
Culture & Recreation	2216	4%	3208	3%
Legal & Accounting	1616	3%	3889	3%
Other Retail Home + Personal	1503	3%	7230	6%
Clothing & Footwear	1067	2%	10463	9%
Cultural Industry	1018	2%	2066	2%
Antiques & Used Goods	836	2%	558	*
Department & Variety	614	1%	557	*
News, Books & Stationary	534	1%	2563	2%
Furniture & Carpet	523	1%	3462	3%
Hardware & Housewares	424	1%	571	*
Entertainment	338	1%	4969	4%
Retail Repair/Chemist/Music/ Appliances/Communication/ Fabric/Cultural/Travel/Garden/ Sport/Jewellery	836	2%	6926	6%
	50,002		119,463	

Source: City of Sydney Floor Space Employment Survey, 2006.

* less than 1%

The data shows that Redfern has a higher proportion of space occupied by Business Services such as legal, accounting, and consulting businesses relative to Darlinghurst. Postal and telecommunications are also higher. In contrast, Darlinghurst has a higher proportion of space given to businesses that foster an active main street, including pubs and clubs, cafes and restaurants, and food retailers.

This confirms the opportunity for Redfern to re-balance the business mix by attracting more of the kinds of businesses that will activate the main street.

Given the risky nature of establishing a new business, and potential failure rates of small businesses, it is likely that new businesses would benefit from support and encouragement from formal and informal business support programs. The Redfern Waterloo Authority and the Department of State and Regional Development fund a



relevant service for businesses within the Redfern Waterloo area and for Aboriginal businesses. The service offers free one-on-one confidential advice through an experienced business advisor who has over 20 years experience helping start new businesses or grow existing ones.

The following table shows the number of people employed in Redfern and Darlinghurst according to Space Use Division.

Table 11. Workforce employed in Redfern and Darlinghurst

	Redfern		Darlinghurst	
	Number	%	Number	%
Community	49	3%	61	1%
Entertainment/Leisure	9	*	89	1%
Industrial	138	8%	68	1%
Office	1290	70%	4012	66%
Restaurant/Eating	158	9%	821	14%
Shop/Showroom	189	10%	902	15%
Other	-	-	83	1%
Total	1833		6036	

Source: City of Sydney Floor Space Employment Survey, 2006. Total employment (including Full time and Full time equivalent)

* less than 1%

The data indicate that in Redfern only 19% of the local workforce is engaged in the retail sectors of shop/showroom and Restaurant/eating, compared with 29% of the Darlinghurst workforce. The total workforce is less than one-third the size of the Darlinghurst workforce.

This confirms that the Redfern retail sector is under-developed compared with Darlinghurst.

Implications for Business Precinct

The most immediate need is to address the high proportion of vacant premises.
More commercial enterprises are needed to balance the high proportion of social services currently present.
More main street retailing businesses are needed to balance the high proportion of business services and theoretically should be supportable.



The following map shows some key characteristics of different sections of the study area.

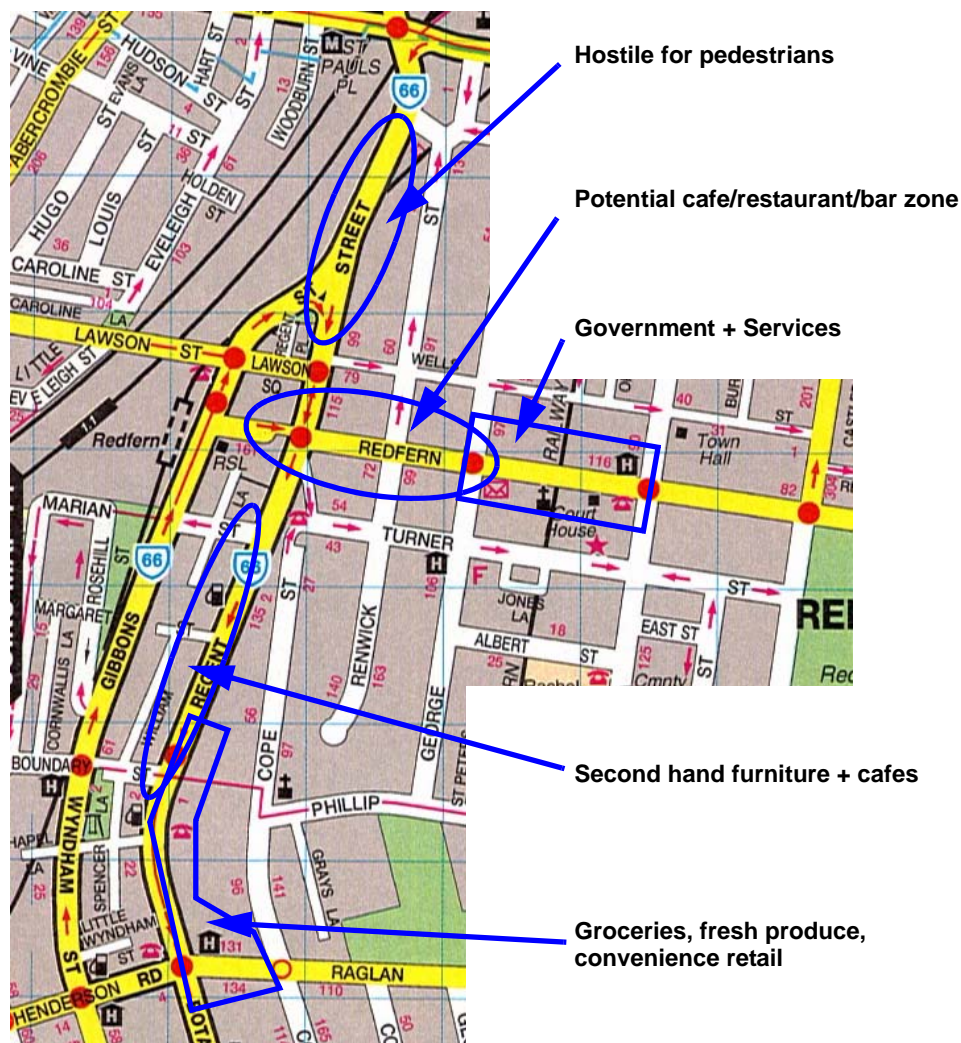
The northern section of Regent Street is quite hostile for pedestrians because there are few active shopfronts and one way traffic flows swiftly alongside the footpath where there is no buffer provided by parked cars.

The footpath upgrade on Redfern Street, along with a number of high visibility corner sites provide strong potential for developing a cafe/restaurant zone between Regent Street and George Street.

Two thematic zones have emerged on Regent Street. On the eastern side, the IGA anchors a food and functional retail zone, while second hand furniture and cafes have begun to establish on the western side.

On Redfern Street between George and Pitt Street a cluster of Government, Community and Employment service organisations is emerging.

Fig 11. Zones within the study area



Implications for Business Precinct

There are opportunities to support the emerging thematic zones identified in Fig 11 and thus reinforce positive synergies between compatible businesses.



3.3 Retail Analysis

3.3.1 Current Economic Climate

ABC News reported (2 June 2008) that sales in retail and hospitality outlets are falling in 2008, based on ABS data. These falls reflect the impact of higher interest rates and increased petrol prices on discretionary income. Sydney's rent crisis is also exerting pressure on discretionary spending as more money goes into paying higher rents.

The ABS figures show that the biggest cuts in household spending were on recreational goods and food. For the moment, clothes and department store sales have been immune to the pressures. Rises of 2.9% and 1.9% in these sectors have surprised some economists.

It may be anticipated that the factors suppressing discretionary spending may continue for several years. Petrol prices, Sydney rents and interest rates are likely to remain high or to rise in coming years.

Implications for Business Precinct

This economic climate of reduced discretionary spending, may impact the development of leisure and lifestyle businesses in Redfern by reducing potential market demand. However, it may provide market opportunities for businesses that offer unique goods at low prices (e.g. second hand furniture).

Low-cost premises such as those in Redfern are likely to be attractive to new businesses that seek to reduce risks while getting established.

Low-cost premises often appeal to creative industry enterprises that can add fine-grain character to precincts.

3.3.2 Competitors

Redfern's biggest competitor is the Sydney CBD only 3km away. With 14 major shopping centres, thousands of retailers, hundreds of restaurants and service providers, the CBD offers the experiences and choice of a world-class city. In addition to high-end retailing, the CBD is well served with low-cost offers for the lower end of the market, especially in the Haymarket area which is the closest part of the City to Redfern.

At present, Redfern has little to attract non-locals, and it struggles to keep even local business from going to the CBD or elsewhere.

At a smaller scale, the many local retail strips of inner Sydney attract business from outside their area by offering attractive settings for interesting and distinctive retail experiences. A revitalised Redfern which has a strong identity and coherent retail offer



will be able to compete effectively with distinctive local shopping areas such as: Newtown, Danks Street, Surry Hills, Erskineville, Glebe and Leichhardt.

Implications for Business Precinct

If Redfern is to capture more of the expenditure that currently occurs in the CBD, it will need to consolidate a reputation for a unique retail offer that cannot be fulfilled by 'going to town'.

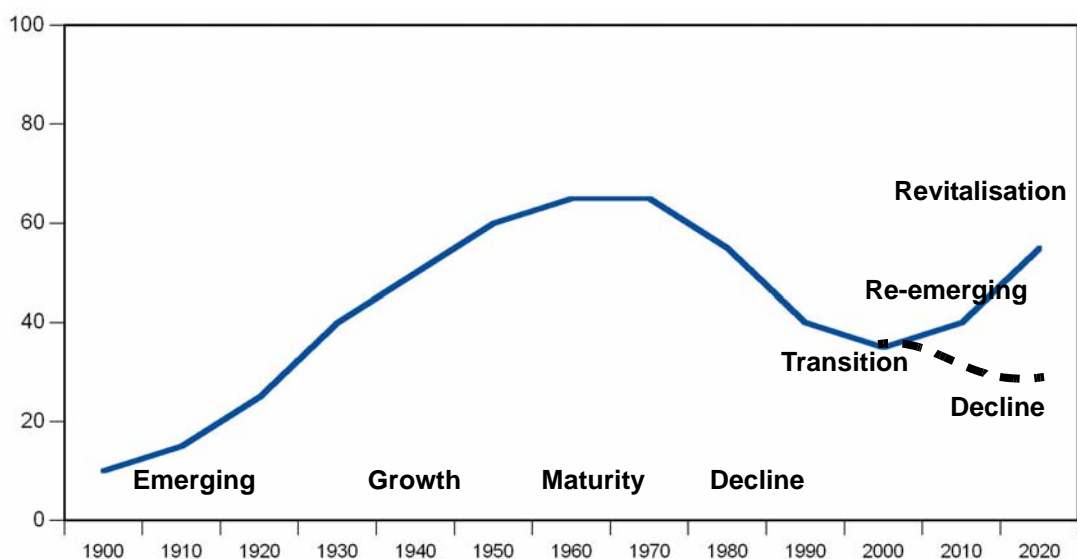
To compete with other local strips, Redfern will need to develop its own identity and retailing experience. It will compete with other local strips by being different from them in character and focus. It will complement them rather than competing like for like.

3.3.3 Business Cycle

As noted in Section 3.1.2 History, Redfern has experienced cycles of change through the nineteenth and twentieth centuries. Redfern emerged economically as a local village in the early part of the 1900s. It accelerated into growth during the post war industrialisation and reached maturity in the late industrial economy of the 60s-70s.

The following diagram gives a notional illustration of the economic cycle. It shows that Redfern is currently in a state of transition, poised before two alternatives – stagnation/decline or economic re-emergence.

Fig 12. Economic cycle of Redfern town centre



This cycle needs to be considered in planning for future development especially with respect to likely timeframes for business renewal. Economic cycles unfold across decades, and re-emergence from the current low point in the economic cycle is likely to occur across decades. The initial years of economic renewal will be characterised by foundational initiatives across all the essential activity spheres:

- physical domain
- stakeholder cooperation and organisation
- economic structure
- promotion

These initial activities will establish a platform for future growth and re-emergence. The platform needs to build on strengths and nurture opportunities to deepen and broaden the economic base.

One feature of this low point in the economic cycle is that current businesses have a strongly local focus (our shopper survey showed 68% of shoppers were locals). There is the potential for Redfern to grow in stages:

1. Stronger offer for local catchment – attract more business from locals who currently go elsewhere for much of their shopping.
2. Stronger offer for sub-regional catchment – begin to be known as a destination that attracts users from wider area.

To grow into a sub-regional centre, Redfern will need to establish a centre of gravity that acts as an attractor for customers and then for other related businesses that can add to the hub. This centre of gravity will need seeding support for the time it takes to become established and to develop its own sustainable dynamic.

Redfern has a unique opportunity to occupy a position with authority in relation to Indigenous culture. This potential sets it apart from other inner city retail precincts such as Darlinghurst, Newtown and Glebe.



3.4 Policy Context

Sustainable Sydney 2030 sets a vision for Redfern and identifies objectives and outcomes that need to be considered as they will shape the opportunities and directions.

Vibrant Local Communities and Economies (Strategic Direction 6):

The City is made up of diverse communities who come together in villages of different character. Villages play an important economic and employment role. Action is needed to enhance social wellbeing across the city, ensure equitable distribution and access to social infrastructure, provide spaces for small and local businesses and enhance the distinctive character of villages.

Included in the objectives are:

- Maintaining and enhancing the role and character of villages (objective 6.1);
- Creating a network of activity hubs as places for meeting, shopping, creating, learning and working for local communities (6.2);
- Developing and supporting local economies and employment (6.4)

A Cultural and Creative City (Strategic Direction 7):

The City provides a platform for creative expression and has cultural diverse communities as a result. The City's culture extends beyond arts to lifestyle, heritage and the natural environment. Arts and cultural activities are fundamental to liveability, tolerance, quality of life and increasingly, to economic development. The City has a large and growing cluster of businesses engaged in creative industries. As such, action is needed to:

- Encourage the contemporary expression of ATSI cultural heritage (objective 7.1);
- Support creative and cultural industries (objective 7.3);
- Provide cultural leadership and establish cultural partnerships (objective 7.4).

Redfern is specifically identified as an action area in relation to the desire to plan for a new hub around Redfern Street (action 6.2.2) and to focus on the cultural and creative aspect of Redfern's activity hub (action 7.4.6). A key lead project is the Eora Journey which it is conceived would celebrate and share the story of the world's oldest living culture through a cultural walk from Redfern to the harbour, as a means to build social, cultural and economic sustainability for Sydney's Aboriginal and Torres Strait Islander community.

Implications for Business Precinct

Economic renewal in Redfern will be encouraged by local and State governments through their planning strategies.

The City of Sydney recognises the importance and relevance of Indigenous heritage to the future of Redfern.



4. Research and Consultation

4.1 Business Consultation

Three Business Forums were conducted to gather input from local business owners. In addition, we gathered information from landowners and agents about vacant buildings.

1. South Sydney Business Breakfast, coordinated by Souths Leagues Club. 19 March 2008. This Forum considered the broad directions for future development of the Redfern Business Precinct, what specific shops and businesses they would like to see in Redfern, and the strategies and plans needed for future action.

Four key issues for future action were identified.

- Marketing Strategy
- Plan to address perceptions of safety
- Plan to reduce vacant frontages, reduce number of shop shutters and tidy up facades. Temporary use of empty buildings.
- Traffic management to address parking and pedestrian access.

2. Redfern Waterloo Business Forum, coordinated by Redfern Waterloo Chamber of Commerce. 6 May 2008. This meeting considered the broad directions for future development of the Redfern Business Precinct, what specific shops and businesses they would like to see in Redfern, and the strategies and plans needed for future action.

The meeting proposed the following actions.

- Establish a long term direction for the future of the business area.
- Devise a plan to remove shop shutters, starting immediately. Explore options for support from City of Sydney and insurance companies. Share the experiences of shops that don't have them.
- Devise a plan to use empty shops in constructive ways, starting immediately (e.g. student projects).
- Talk with owners to discover the reasons why shops and business premises are untenanted.
- Establish a program of community events (e.g. Redfern Festival) that will attract locals and visitors to the area.
- Establish a program of promotions and activities that encourage locals and visitors to come.
- Consider ways to encourage Indigenous businesses to establish in Redfern.
- Explore issues around the location of the Needle Exchange Bus, especially the perspectives of local residents, businesses, health and police professionals.
- Develop better communication networks so that local activities are highly visible locally (e.g. Indigenous Youth Festival planned for end of May should have posters



in shop windows).

- Develop better communication networks to share local news (e.g. fall in crime stats mentioned at meeting by Local Area Command).
- Devise a communication strategy that finds good news stories and communicates them regularly and responds to bad news stories with examples of positive news events (e.g. strategy that has helped redefine perceptions of Cabramatta over 10 years).
- Consider how the separate sub-locations (e.g. Regent Street vs Redfern Street) might be encouraged to 'specialise', and develop meaningful ways that linkages can be developed between them.
- Promote Police services such as 'Safer by Design' assessments for businesses. The Local Area Command has the resources to provide this service.
- Promote City of Sydney Bizsafe program.
- Consider whether greater use of CCTV would enhance safety and perceptions of safety.
- Encourage local community support for long-range initiatives such as the mooted Australian Indigenous Cultural Centre and developments at ATP/Eveleigh.
- Develop local interpretation and walks, aimed at Sydney Uni students, Sydneysiders and tourists. RWCC could have a presence at Orientation Week.

3. Redfern Waterloo Business Forum, coordinated by Redfern Waterloo Chamber of Commerce. 17 June 2008. This meeting reviewed seven actions required for future development of the Redfern Business Precinct.

The meeting endorsed the seven actions that are documented in Section 6 of this report.

4. Owners and Agents views on vacant premises. Only one owner responded to our survey, he indicated that he was ready to lease his property but there was no interest.

Interviews with six leasing agents revealed the following common threads.

- It is hard to lease property in Redfern due to the poor reputation of the suburb, especially crime, safety, beggars/loiterers, anti-social behaviour on the streets and Indigenous Australians.
- Premises are old and some owners are reluctant to renovate.
- Some owners are attempting to redevelop or considering redevelopment.
- Lack of parking for staff.
- Parking meter time limits too extreme for a struggling precinct.
- Rental expectations are slightly too high.
- Absentee landlords who have held property for a long time.
- Difficult to amalgamate sites to provide larger areas.
- Retail trade in Redfern is depressed. It needs a critical mass of places to go – cafes and restaurants.



- Too much retail stock. The planning controls force developers to put retail at ground level but the result is 'rubbish stock' with columns everywhere and set backs that reduce visibility and exposure.

Councils should be learning that not every building needs retail at the ground floor.

Leasing Agent, 2008

Implications for Business Precinct

The depressed state of business activity in Redfern was confirmed in this consultation. Coming off a low base, the renewal process will take considerable resources applied consistently over a long period of time.

The consultation reflected the necessity to work on several fronts at the same time to improve the physical environment (shutters and empty shop fronts), the retail mix (more businesses), image (positive messages) and social conditions (anti-social behaviour on streets).

The RWCC has been activated, but it has limited resources, especially in the light of the problems faced.

There is an opportunity to initiate a common forum involving owners, agents and businesses to address cooperative strategies for precinct development.



4.2 Business Survey

A business survey was developed in conjunction with the City of Sydney to gather profile information about businesses along with their perceptions about future directions for the Business Precinct.

Surveys were sent by mail to 217 businesses, using addresses provided by City of Sydney from the Floor Space Employment Survey. There were 83 responses, giving a response rate of 38% which is excellent for a mailed survey.

Of the 83 completed surveys, 55% represented retail businesses and 45% represented non-retail businesses.

Summary and implications

The current business community is a stable one, they have operated in Redfern for a long time and one-third own their premises. Many are low-turnover businesses that see themselves as 'Useful and convenient' and 'Good value'.

Most businesses, especially retailers, identified their customers as local residents, workers and students.

Businesses favoured a future direction that focused on more businesses that provide basic services for locals, and more cafes, bars and restaurants.

Businesses placed high priority on improving the sense of safety and security in Redfern, and attracting businesses to empty shopfronts.

To attract more customers, they emphasised the need for better access (parking and transport), greater security, more specialty shops, reduced social problems on the streets and better image for Redfern.

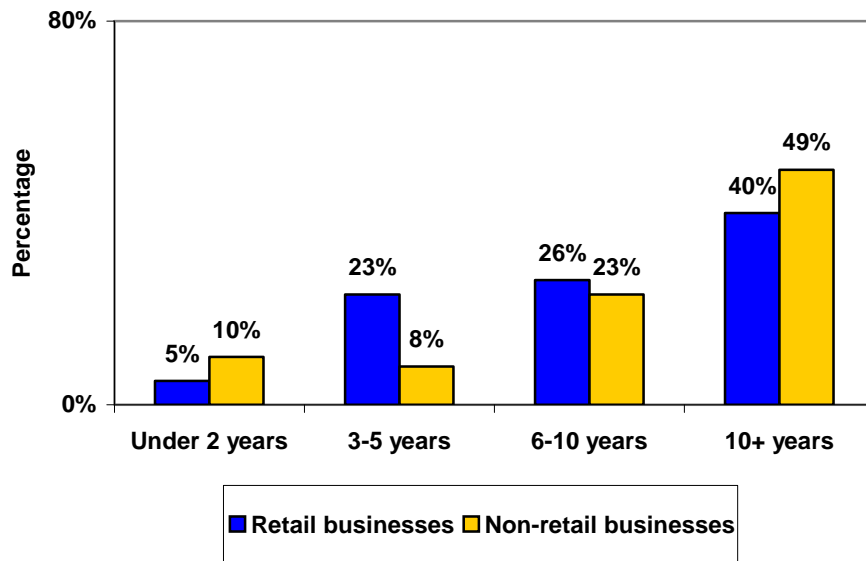
The survey confirms the strong localism of current business operations and the urgent need to attract more shopfront businesses to the main trading streets.

4.2.1 Duration of business

Most businesses were well-established and had been trading for many years. Nearly half (49%) the non-retail businesses had been operating for more than 10 years, compared with 40% of retail businesses. Retail businesses tended to be somewhat 'younger' with 28% operating for less than five years.

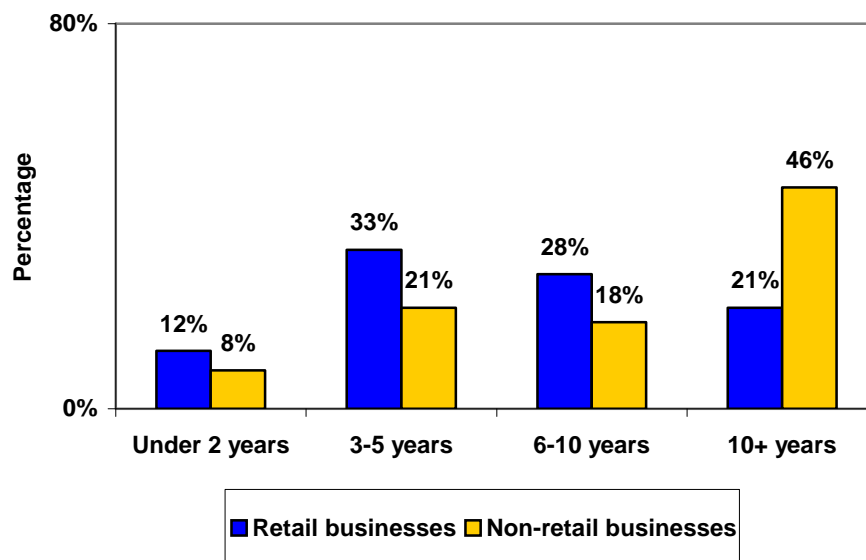


Fig 13. Length of time in business



Similarly, most respondents to the survey had worked in the business for long periods, as the following graph illustrates.

Fig 14. Length of time manager/owner has worked in the business



Only 14% of businesses surveyed were members of the Chamber of Commerce.

In terms of owning or leasing the premises, survey results show that 71% of businesses leased their premises, and 29% owned them. This is high compared with a recent survey in Glebe where only 14% of business owned their premises. (Glebe Business Precinct Study, Hill PDA, 2007).



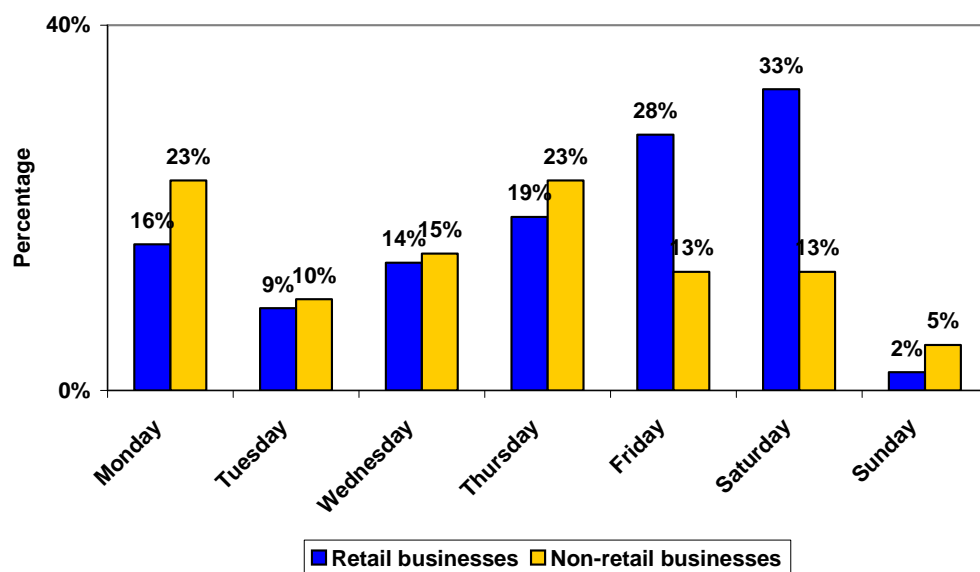
4.2.2 Operations

Businesses were asked to nominate their busy days and times. The following graph shows that most businesses do not operate on Sunday.

Friday and Saturday are busy days for retail businesses, while non-retail businesses reported Mondays and Thursdays as their busiest days.

Observation confirmed that Redfern Street is largely inactive on Sundays, however there are pockets of activity in Regent Street around the supermarket on one side and the furniture shops/cafes on the other side of the street.

Fig 15. Busy days



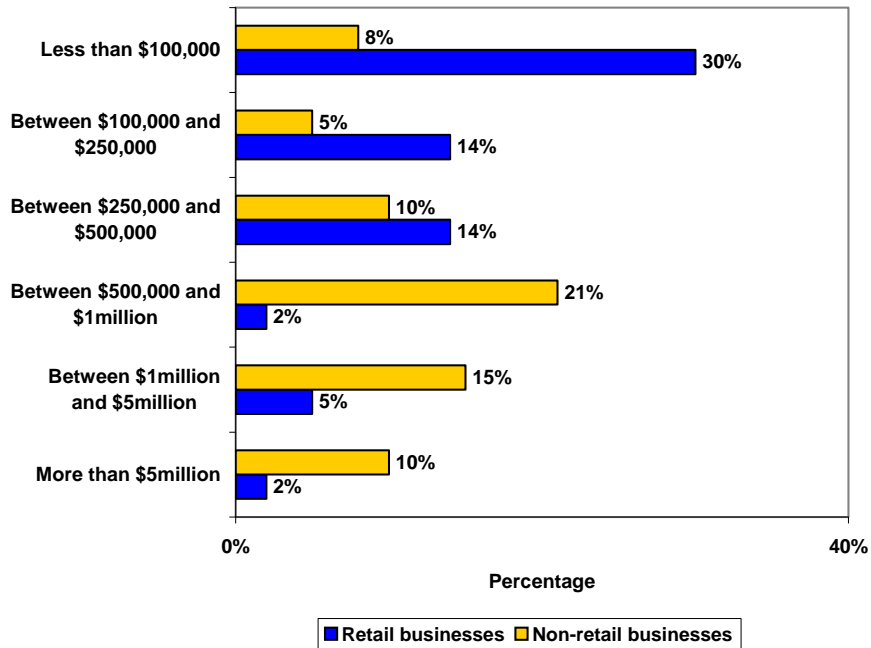
Sunday activity on Regent Street

Two-thirds of respondents gave an indication of their turnover. The following graph shows that 30% of the retail businesses had a turnover less than \$100,000 and only 7%



had turnover of more than \$1million. Non-retail businesses were considerably larger – 25% had turnover of more than \$1 million.

Fig 16. Turnover



In terms of marketing activities, only 33% of the businesses interviewed responded that they were undertaking marketing. Most of these were non-retail businesses which had been operating for more than five years. This is low compared with Glebe where 53% of businesses reported that they were undertaking some form of marketing.

The most common types of marketing were website, internet, and newspaper advertising.

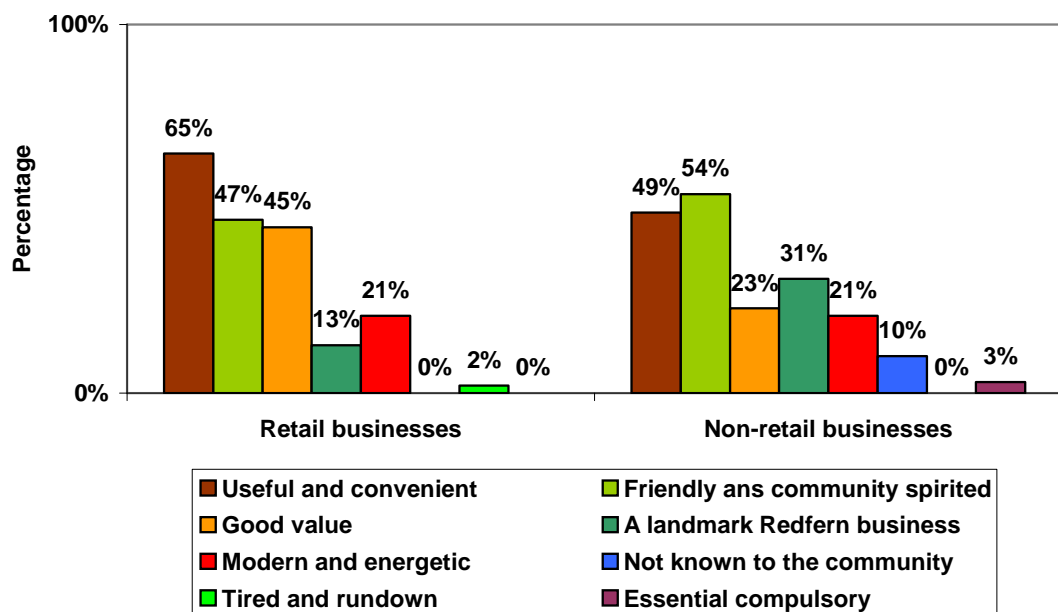


4.2.3 Perception of businesses

When asked to say how their business was seen by the community, retail businesses thought they were characterised mostly as:

- Useful and convenient
- Friendly and community spirited
- Good value for money

Fig 17. Perceptions of businesses



Only a small proportion of businesses thought they were seen as 'Landmark' Redfern businesses or 'Modern and Energetic'. Some types of businesses that identified themselves as Landmarks were:

Post Office, Police, Bar/Hotel, Retail Women's Clothing, Pharmacy, Newsagency, Centrelink, Hairdresser and Art Gallery.

Some types of businesses that identified themselves as Modern and Energetic were:

Art Gallery, Psychologist, Mens Clothing, Hairdresser, Legal Office, DVD rent and retail, Pharmacy, Centrelink, Cafe, Retail Liquor Store, Public Relations and Customs Brokers.

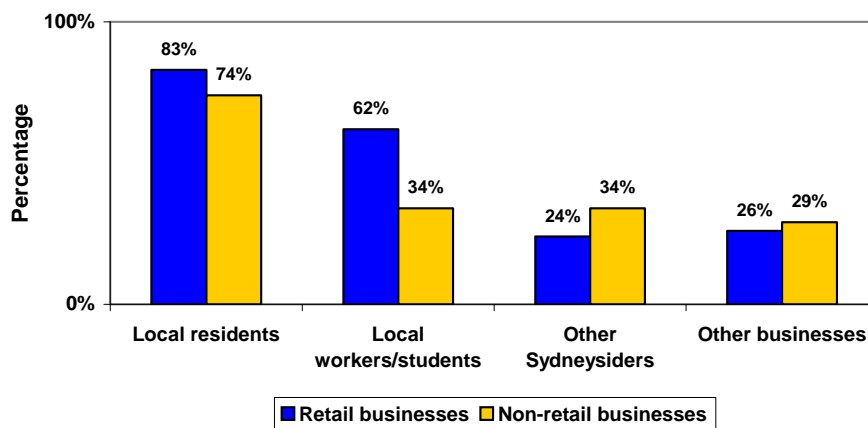


4.2.4 Customers

Most retailers in the survey estimated that their customers were mostly local residents or people who worked/studied in the local area. While these customers also predominated for non-retailers, non-locals and other businesses were also served, as the following graph illustrates.

Non-local customers were most likely to come from the Inner West, City and City South (67%), and the Eastern Suburbs (63%).

Fig 18. Source of customers



4.2.5 Perceptions of street upgrade

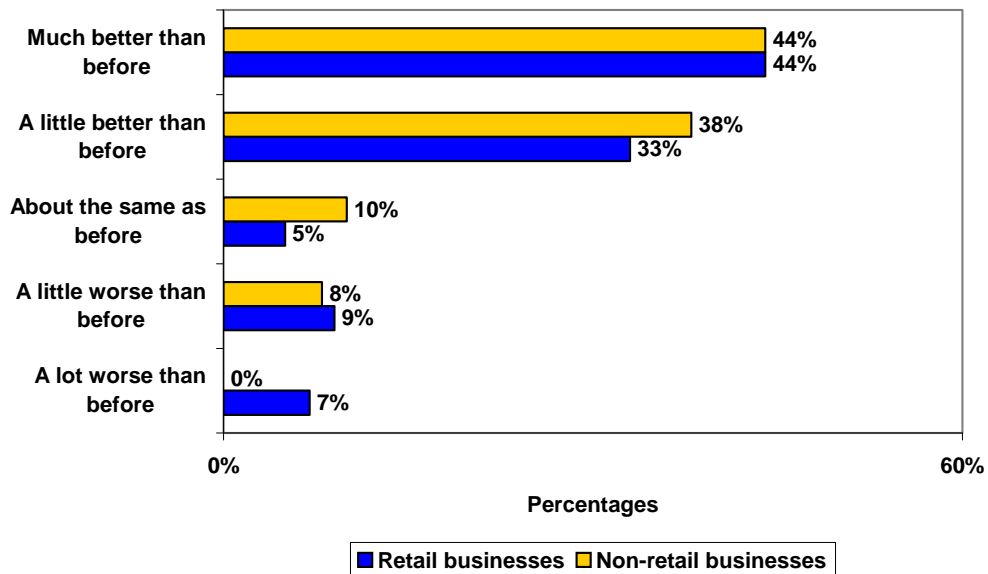
Businesses were asked their view on the recent Redfern Street upgrade. Most businesses, both retail and non-retail, thought that the upgrade made the area 'much better' (44%) or 'a little better' (35%) than before.

A small proportion (16%) of retail businesses thought that the outcome was 'a little worse' or 'much worse'. Consultation with businesses indicated that there were two main areas of complaint about the upgrade. One was that the disruption had harmed businesses, and the other was that there was less parking on Redfern Street after the upgrade (lack of parking, expensive parking, loading zone times and marking of car spaces.).

There were comments in the survey that the footpaths needed regular cleaning or were slippery. Some respondents also noted that Redfern needs further assistance to improve safety and negative perceptions.



Fig 19. Effect of street upgrade



Some specific comments are shown here.

The paving on Redfern Street is extremely slippery in the rain and it's only a matter of time before someone is seriously injured and the Council is sued.

The upgrade does aesthetically look a lot better, however there is a significant decrease in parking spaces provided to our customers.

Parking has become more restricted and therefore harder on businesses to attract passing customers.

Our business has suffered a loss of \$30,000/month during six months of reconstruction and has not recovered from the severity of its loss.

4.2.6 Future Focus for Redfern

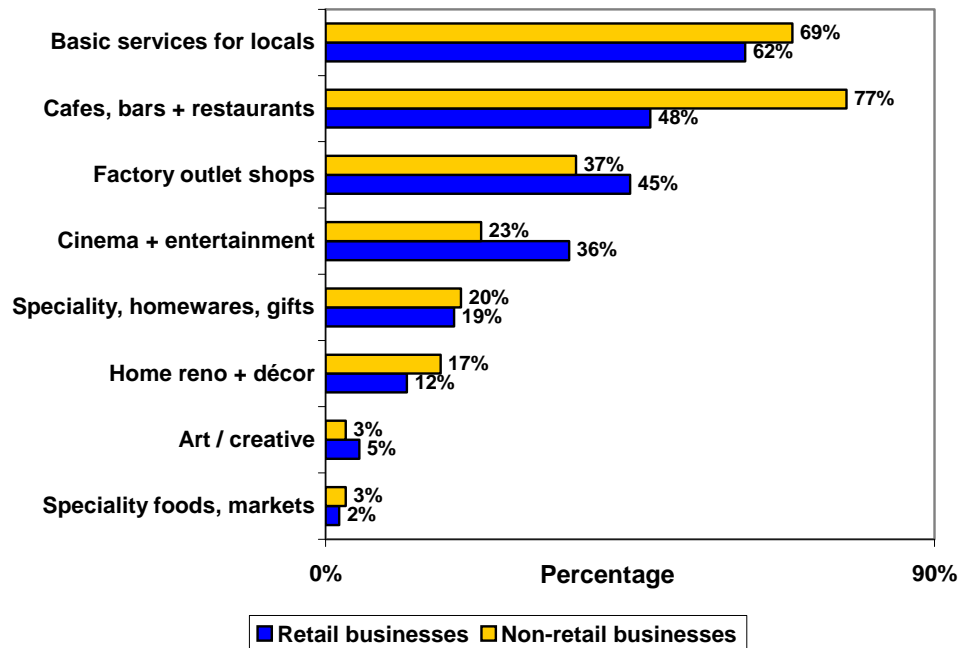
Respondents were asked to select from a range of future directions for Redfern. The following graph shows that businesses in this survey tended to favour the introduction of more basic services for locals along with cafes, bars and restaurants. There was moderate support for factory outlet shops, cinema and entertainment, and specialty shops offering homewares, gifts, home decor and renovation supplies.

There was little support for arts and creative outlets or specialty foods/markets as a focus for future development.

Retailers were much more in favour of cafes, bars and restaurants than non-retail businesses.



Fig 20. Focus for future direction for Redfern



Participants made perceptive comments about their vision for the future of the Redfern Business Precinct.

To encourage other specialty small businesses in the area not just cheap budget shops. Local residents want better shops and basic amenities: deli, butcher, fruit and vegetables, breadshop, supermarket, art galleries (Aboriginal art gallery or shop).

Quirky/low rent/close to Sydney/arts and locals. The Brunswick Street of Sydney.

That businesses be encouraged to move into the precinct. That all the shops along Redfern street be occupied and done up.

I think that the area needs to be marketed in a more appealing light. It could become quite funky and useful.

More outdoor cafes, more street banners, more exciting Christmas and Easter decorations. Less alcohol and drugs.

A lot more new and modern shops, outdoor dining and better parking facilities, no more shutters.

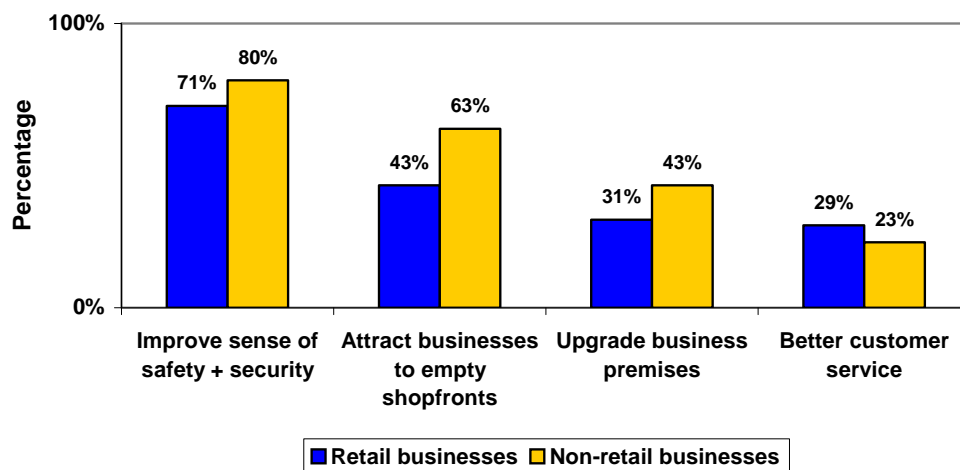
I would like to see more passing trade more great shops, less people begging for money. Safer!

I'm trying to envisage it being completely free of Westfield abominations. I see preservation of historical buildings and trees.



Participants were asked to prioritise five actions that could lead to improvements. Most businesses thought that improving the sense of safety and security was a top priority. Attracting businesses to fill the empty shop fronts was also a top priority for a majority of businesses, especially non-retail businesses. Upgrading business premises was also seen as a priority by a substantial proportion of survey respondents.

Fig 21. Priority Actions



Participants were asked to make suggestions for attracting more users to the Redfern shopping and business precinct. The following graph shows the main suggestions that were made.

Overall non-retail businesses made more suggestions than retailers, however, both types of businesses tended to make similar suggestions.

Some suggestions related to positive features of the shopping experience:

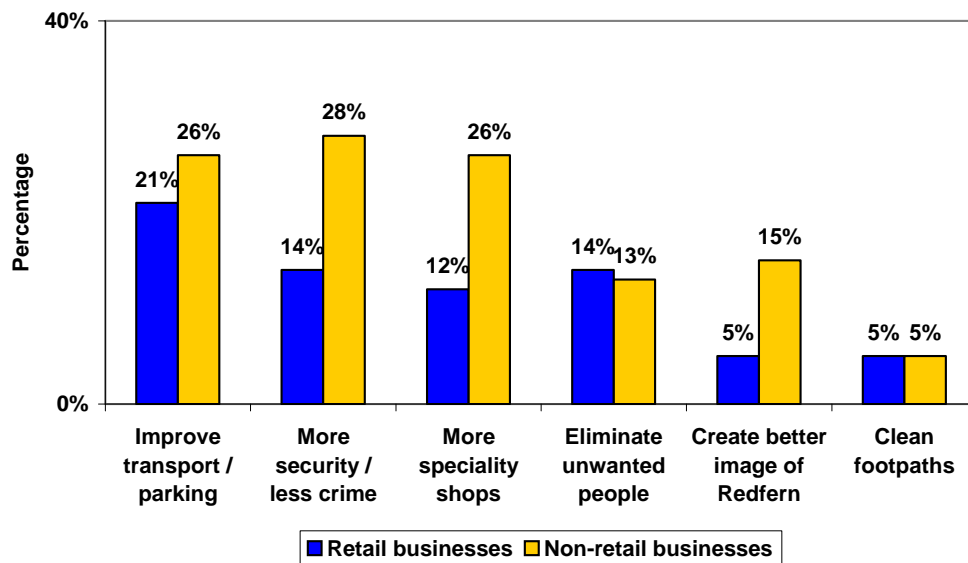
- provide more specialty shops.

Other suggestions related to removing negative aspects of the shopping experience:

- improve parking and transport
- better security and safety
- remove beggars and drug/alcohol affected people
- tackle the legacy of negative images associated with Redfern
- clean footpaths/remove roaming dogs.

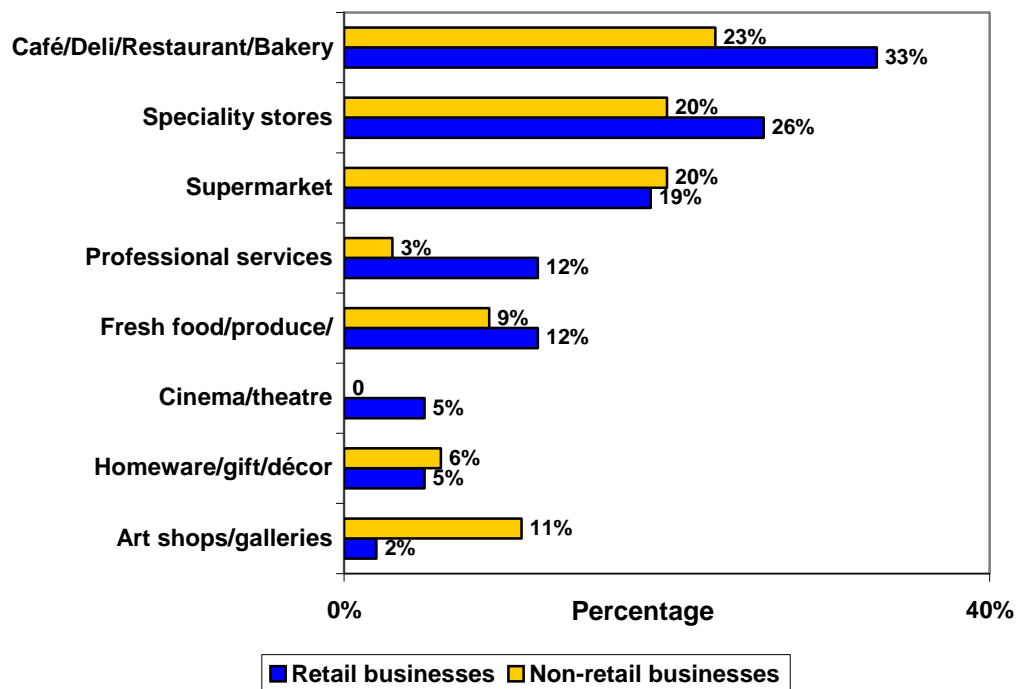


Fig 22. Suggestions for attracting more customers



Participants suggested the following types of new businesses for Redfern.

Fig 23. New businesses for Redfern



4.3 Shopper survey

A shopper/visitor survey was conducted in March 2008. 205 shoppers were surveyed on Redfern Street and Regent Street, on weekdays and weekends – 66% of the interviews were conducted on weekdays and 34% at weekends.

There were somewhat more women (59%) than men (41%) in the sample. Interviews were conducted across the day as follows:

8.00-11.00am	28%
11.00am-3.00pm	51%
3.00-7.00pm	20%

Weather conditions were dry and either warm or hot.

Summary and implications

Most shoppers lived, worked or studied locally and were in the shopping precinct specifically to use one of the business. 'Convenience' was the main reason given for using shops and businesses in Redfern.

Most shoppers had walked to the Redfern retail precinct and most (80%) stayed less than an hour.

The high proportion (89%) of locals who walked to the business area shows the extent to which trade is confined to a very local catchment area. It is likely that to some extent current trade is limited to those who are unable to go elsewhere.

Both locals and non-locals had a mixture of positive and negative impressions associated with Redfern. The positive impressions can form a basis for positive stories about the business area. Locals had a particular appreciation for the multicultural character and diversity of the area.

Shoppers mentioned a number of limitations of the Redfern shopping area: the limited range of shops, need for Station upgrade and street cleaning, and concerns about personal safety, crime and beggars.

Three priority areas were identified for future action:

- Improve sense of safety + security
- Improve Redfern image
- Attract businesses to empty shopfronts

The predominant feature that would encourage shoppers to use Redfern more was a wider variety of shops.

For most categories of goods, the Sydney CBD was the predominant main shopping location, however Redfern was the main location for groceries and banking.

The survey confirms that Redfern currently serves a very local catchment and that shopping activity is very limited (very short visits). The priorities for renewal are: wider diversity of shops, improved safety and security, and an improved image that is matched by the shopping experience.



4.3.1 Patterns of use

Most (81%) shoppers said that they had come specifically to use one of the businesses, and 18% said they were using the shops/businesses while on their way elsewhere. This was slightly higher (23%) before 11.00am.

The following table shows that most shoppers had strong connections with the local area.

Table 12. Local connections

	(205)
Live locally	73%
Local friends/relatives	67%
Work locally	30%
Study locally	10%

Live locally

Darlinghurst – 50%
Newtown – 20%
Glebe – 46%

The actual proportion of shoppers who study locally is probably higher than this indication because many English-language students at GCA did not have sufficient English to participate in the survey.

Most shoppers travelled by foot, as the following table summarises. As expected, non-locals were less likely to walk, even so, the low use of cars is notable. Most participants (82%) thought that Redfern is adequately served by public transport, and this was the same for locals and non-locals.

Table 13. Transport

	Local (140)	Non Local (64)
Walking	89%	19%
Train	2%	52%
Car	5%	17%
Bus	2%	8%
Bicycle/taxi/motorcycle	1%	6%

Walked

Darlinghurst – 49%
Newtown – 28%
Glebe – 55%

As would be expected, people who lived locally tended to shop more frequently as shown in the following table. There was little difference between people who were shopping for food or using takeaways/cafes and those who were using others shops and services.



Table 14. Frequency

	Local (140)	Non Local (64)	Food/ cafe (120)	Non food (81)
Every day	39%	39%	44%	33%
Several times a week	45%	31%	38%	44%
About once a week	9%	11%	6%	14%
Less often	7%	19%	13%	8%

Shoppers were asked for their main reason for visiting the shops/businesses. The overwhelming reason, especially for more frequent shoppers, was convenience. Three-quarters (76%) said they shopped in Redfern for convenience. A further 7% nominated value for money as their main reason.

Locals were particularly likely to nominate convenience, whereas non-locals had a broader range of reasons for using Redfern shops and businesses, as shown in the following table.

Table 15. Main reason for using shop/business

	Local (140)	Non Local (64)
Convenience	86%	52%
Value for money	5%	11%
Close to work/study	1%	14%
Appointment	2%	6%
Unique products	-	8%

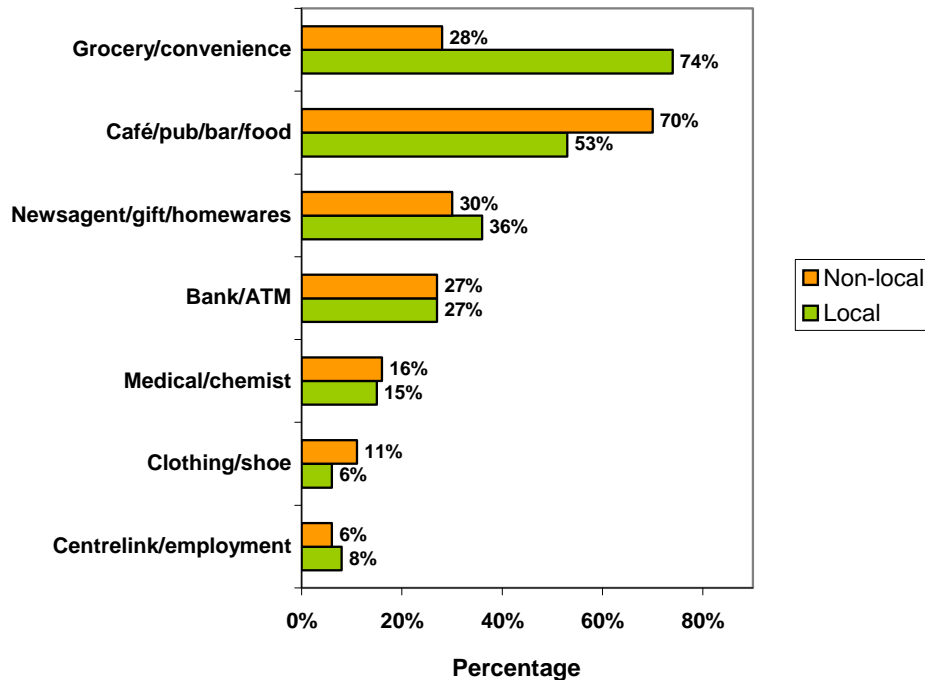
The following graph shows the main types of shops and businesses that were used by locals compared with non-locals at the time of the interview.

It is notable that grocery and convenience stores were used more by locals, whereas cafes/pubs/bars and food outlets (and clothing/shoes stores to a lesser extent) were used more by non-locals. Other shops and services were used by locals and non-locals to a similar degree.

People who used cafe/pub/bar/food outlet were twice as likely as others to use a bank or ATM.



Fig 24. Type of business used



Shoppers/visitors were asked how long they expected to spend in the Redfern shopping area. Non locals and less frequent shoppers were likely to spend longer periods in Redfern. In contrast, Darlinghurst shoppers tended to stay much longer.

The following table summarises the overall responses.

30 minutes or less	44%
30-60 minutes	36%
1-2 hours	8%
More than 2 hours	12%

Darlinghurst

30 min or less – 22%

30-60 min– 22%

1-2 hours– 22%

2+ hours – 33%

4.3.2 Perceptions of Redfern and its shopping

Survey participants were asked to nominate the main things that come to mind when they think about Redfern. Both locals and non-locals had a mixture of positive and negative impressions associated with Redfern.

Locals were inclined to see Redfern as ‘their place’ where they were at home with family, friends and community. They appreciated the local shops and the convenience of Redfern Station and some thought that Redfern was an improving, up and coming area.

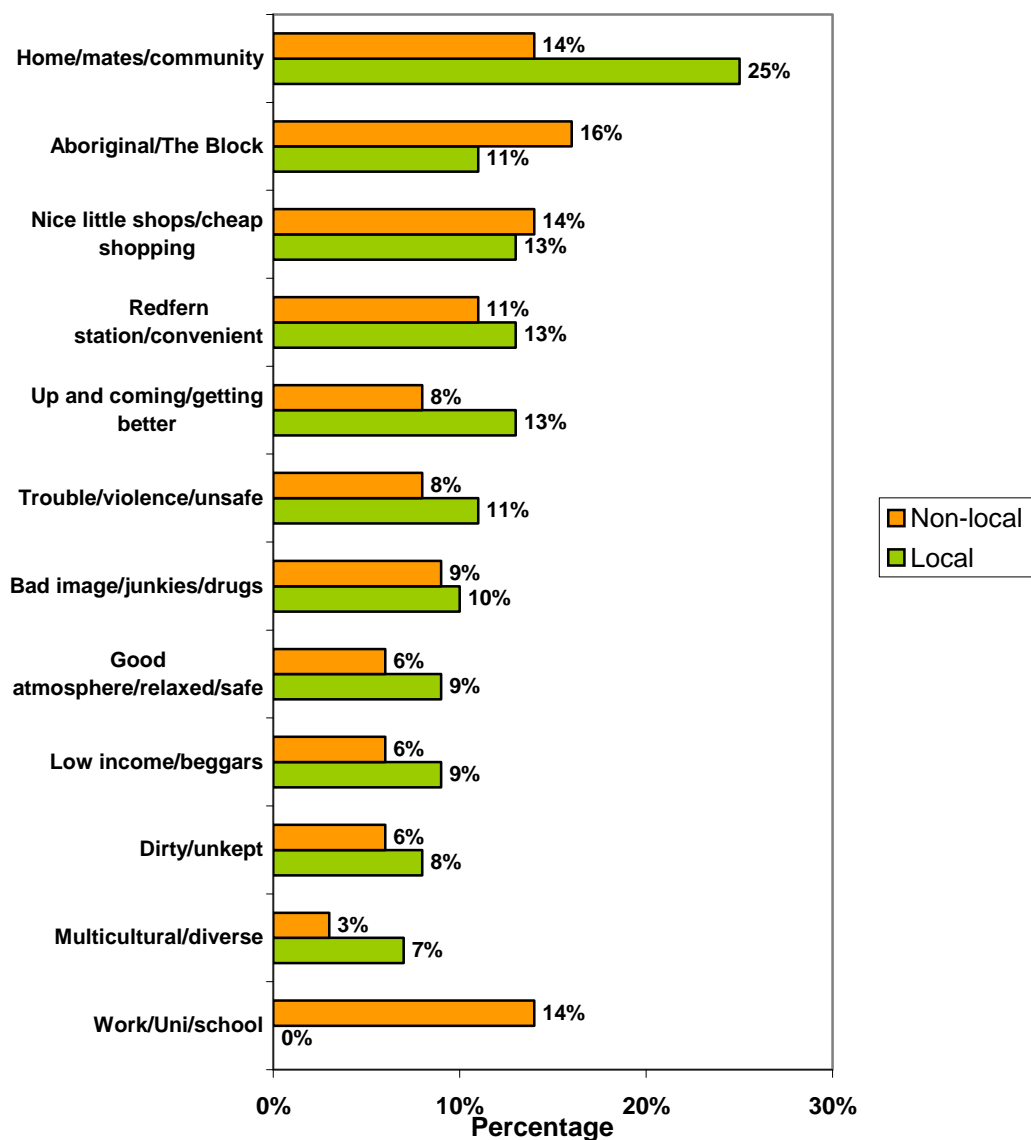


A high proportion of non-locals also held these important perceptions of Redfern. Non-locals were somewhat more likely to associate Redfern with the Aboriginal community, or see it simply as the place where they worked or studied.

Negative perceptions of Redfern were mentioned by both locals and non-locals: Unsafe and violent, bad image of junkies and drugs, low income/beggars and dirty/unkept. Many of these negative images were mentioned slightly more by locals than by non-locals.

In this image of Redfern there are many positive aspects that can form the basis for positive stories about the area.

Fig 25. Perceptions of Redfern



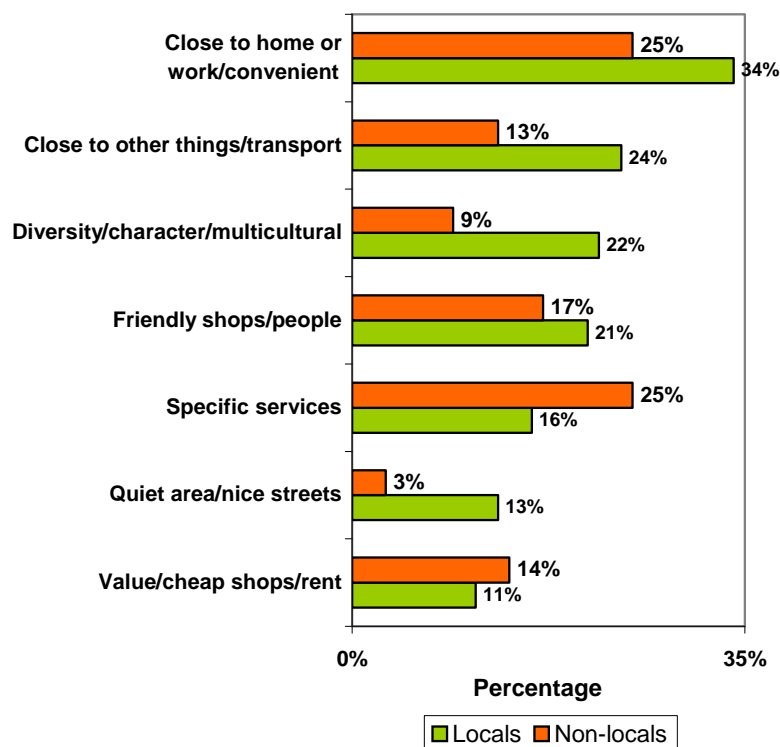
Likes and dislikes

Shoppers were asked to nominate the main things they liked about the Redfern shopping area. There were quite marked differences between locals and non-locals however convenience was important to both locals and non-locals, though locals placed more emphasis on it.

Locals also placed more emphasis on the Diverse/Multicultural character of the local area and the quiet attractive streets.

Non-locals tended to place more emphasis than locals on specific services available in Redfern and value for money.

Fig 26. Things liked about the Redfern shopping area

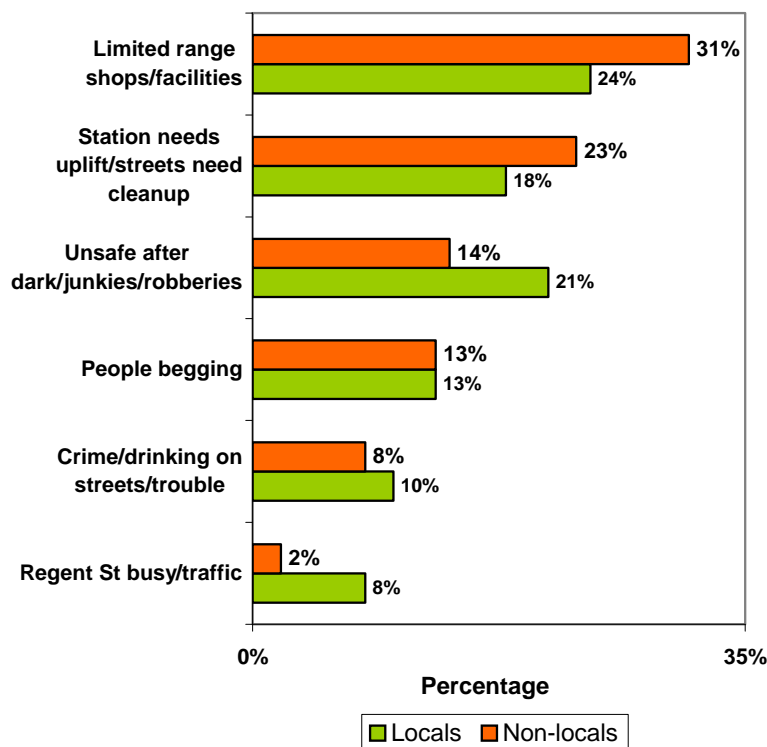


Shoppers were asked to nominate the main things they disliked about the Redfern shopping area. The main dislikes are shown in the following graph. There were three main negatives mentioned:

- limited retail offer
- environmental drawbacks – rundown/dirty streets and facilities, and busy traffic on Regent Street
- unsafe/unpleasant social interactions on the streets – drunks, junkies, beggars.

In general, locals appeared to be more aware of the limited shopping offer and busy traffic, while non-locals appeared to be more concerned by unsafe/unpleasant social interactions on the streets.

Fig 27. Things disliked about Redfern shopping area



Shoppers were asked to nominate specific places in Redfern that they liked. Some common responses were:

- The IGA and food shops nearby.
- The plaza area at IGA.
- Cope Street Reserve.
- The heritage buildings, e.g. Post Office.
- Appetite Cafe was mentioned by six people.
- The street upgrade with its wider footpaths and new paving.
- The \$2 shops.



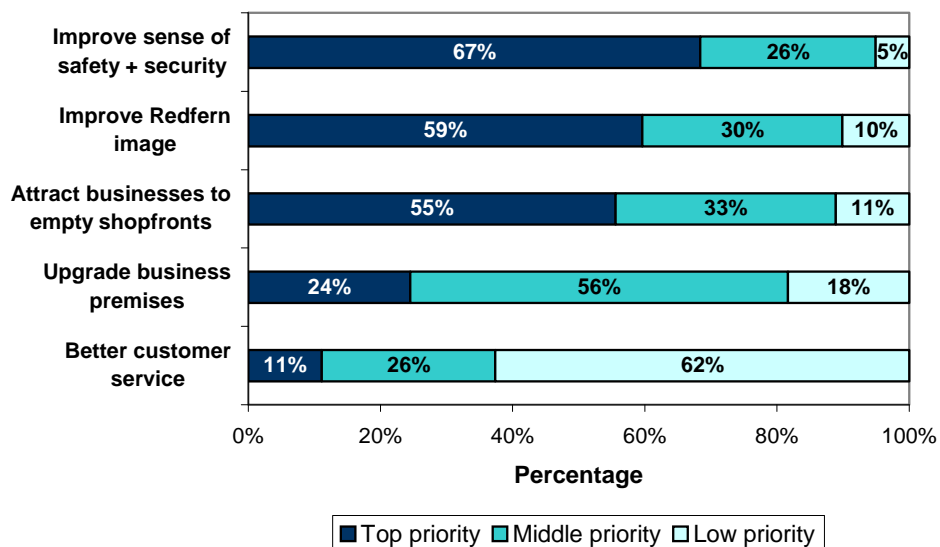
A variety of places were dislikeded, though not as numerous as the places liked. Some common responses were:

- Laneways and back streets (associated with drugs and delinquents).
- The Block (associated with beggars).
- Dirty streets (especially dog poo).
- Methadone Clinic.
- IGA (too expensive).
- The area around the Station.
- The vacant shops.

4.3.3 Priorities and future direction

Shoppers were asked to prioritise five actions for improvement. The following graph shows that shoppers placed greatest emphasis on Safety and Security, the Image of Redfern, and attracting new shops. Locals and non-locals had very similar priorities.

Fig 28. Priority actions

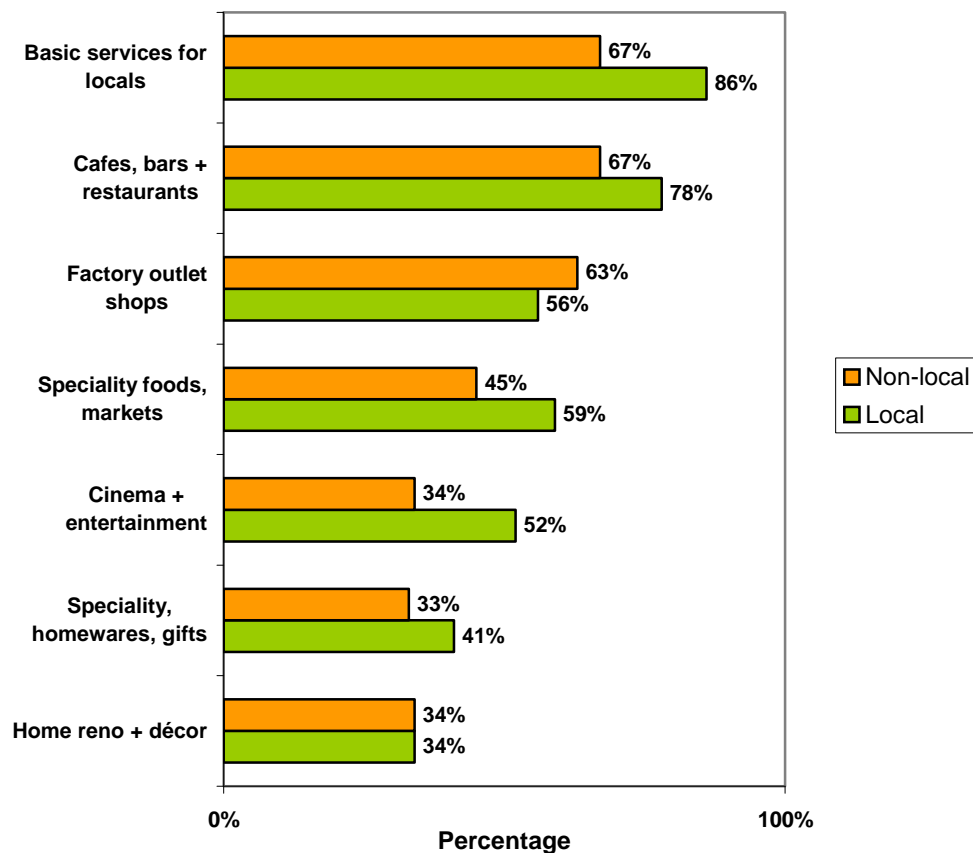


When asked to select a specific direction for future retailing in Redfern, shoppers saw potential in a number of directions. As might be expected, there was strong endorsement for better basic services for locals and for a cluster of cafes, bars and restaurants.

There was moderate support for Factory Outlet Shops and Specialty Foods/Markets, or Cinema/Entertainment.

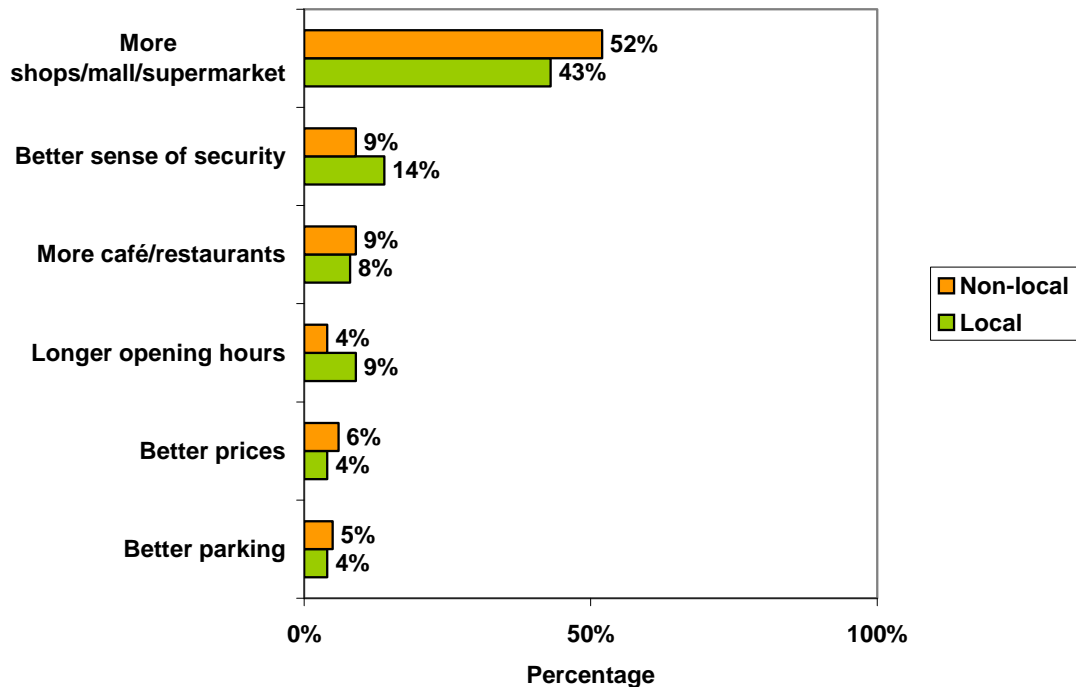
Specialty homewares and gifts, or Home Renovation and Decor also attracted support.

Fig 29. Focus for future direction



When asked to nominate the things that would encourage them to use the Redfern shopping area more often or at different times, the main response was a better range of shops, or a major supermarket as shown in the following graph.

Fig 30. Factors that would encourage more use



When asked for suggestions for specific shops or services they would like to see, shoppers made the following suggestions:

- Major supermarket
- Cafes, restaurants, food shops – Chinese, Indian, Turkish, Italian, Greek, European, fish and chips, pizza, outdoor eating on quiet street
- Child-friendly cafes and shops
- Aboriginal art, culture and community enterprises
- Better quality fresh food shops – bakery, deli, butcher, fish shop
- Art galleries, book shop, art supply shop, craft shop
- Cultural Centre, tourism enterprises.

Shoppers were asked to name the places where they bought a range of goods. The following table sets out the main responses.

Redfern/Waterloo was the main location for both Grocery shopping and Banking. It was also dominant for Personal Items and Personal Services.



The City was the other dominant shopping location. It was favoured particularly for Clothes, Technology, Personal Items and Personal Services.

Other centres that attracted notable proportions of business from Redfern shoppers were: Broadway, Bondi Junction, Marrickville and Surry Hills for a wide range of goods, and Newtown for Banking and Personal Items/Services.

Table 16. Usual shopping locations

	Redfern /W'loo	City	Bdway	Bondi Junct	Surry Hills	Marrick ville	Newtwn
Groceries	37%	*a	4%	3%	19%	11%	*
Clothes	10%	34%	6%	7%	5%	6%	*
Personal items	23%	24%	5%	*	*	9%	4%
Personal services	20%	21%	4%	5%	10%	4%	5%
Technology	5%	33%	10%	6%	*	5%	*
Household items	16%	22%	6%	7%	7%	*	*
Banking	31%	16%	*	*	*	*	5%

a. * signifies 'less than 3%.

Please note that these figures give broad indications and not definitive measures. In each category a number of people gave multiple responses or said 'anywhere', 'nowhere' or 'it depends'.

Banking: 12% said they did their banking on the Internet.



5. Retail issues

5.1 Shopping Centre vs Local Strip Retailing

Major shopping centres are effective partly because they are able to exert strong control over key aspects of the shopping experience such as what shops and services are offered and where they are located as well as the overall environment of an indoor centre with associated parking, along with marketing initiatives and messages.

While local retailing strips do not have the level of control of shopping centres, nevertheless they can benefit from adopting some of the strategic thinking that underpins retail success in large centres. They can identify factors that underpin retail success and look to influence those factors.

Large shopping centres are a successful retail model in Sydney. They are, however, complemented by many successful local retail strips. Indeed, local strips have enjoyed a resurgence of appeal, especially when there is a clear vision of the alternative they offer to the large centres.

In retailing language, local retail strips that incorporate a focus on leisure retail are sometimes called 'Lifestyle Centres'. In many cases, the term 'Lifestyle Centre' is applied to purpose-built centres. A US study by Shopping Centers Today notes that:

Lifestyle Centers are open-air and usually include at least 50,000 square feet of space devoted to upscale national chain specialty stores. These stores offer apparel, home goods, books and music. The most commonly occurring stores at the centers shown in the table, for example, are Ann Taylor, Banana Republic, Barnes & Noble, Bath & Body Works, Gap, GapKids, Pottery Barn, Talbots, Victoria's Secret and Williams-Sonoma.¹

Given that businesses and shoppers in this study wanted Redfern to be seen as an authentic expression of local community characteristics and values, we prefer to think of the Redfern town centre as a 'Distinctive local shopping strip' and not a 'Lifestyle Centre'. Typically, local shopping strips are made up of retailers along with a mix of businesses so that the shops serve local workers as well as residents and visitors. As such, Redfern will function as an Activity Hub with essential local services as a basis for economic and community life.

Like other traditional shopping strips, the challenge for Redfern will be to redefine itself as place with a sufficient critical mass of both convenience and specialty shopping to provide an alternative 'shopping as leisure experience'.

Implications for Business Precinct

The concept of a 'Distinctive local shopping strip' will provide a direction for the Redfern town centre that will be readily understood by businesses, the local community and potential shoppers.

1. Shopping Centers Today: www.icsc.org/srch/sct/sct0402/page59.php



5.2 Clustering

Retail clusters occur when similar retailers choose to co-locate. This is a beneficial organising principle that occurs spontaneously (e.g. furniture shops in Crows Nest, restaurants in Riley Street, outdoor suppliers in Kent Street) and has been replicated by Shopping Centre managers in the layout of Shopping Centres and development of themed centres (Bulky Goods, Lifestyle, etc.).

Cluster development has been adopted world-wide largely on the basis of the potential economic benefits. Michael Porter (Harvard Business School) notes that cluster development improves competition by:

- increasing the productivity of companies based in the area;
- driving the direction and pace of innovation;
- stimulating the formation of new businesses within the cluster.

Competitive advantage is stronger in cluster development due to the greater efficiency of relationship networks that build knowledge and encourage motivation. Despite globalisation made possible by rapidly improving communication networks, the local sphere provides networking advantages that can give a competitive edge.

Effective cluster development can deliver social benefits in two ways:

- benefits that result indirectly via economic growth (e.g. higher employment and improved local services)
- benefits that are a direct result of cluster activities (e.g. stronger community networks, local events and programs).

The importance of stronger community networks, or social capital, is recognised in the Sydney Metropolitan Strategy, Ministerial Directions Paper (May 2004) which notes:

Australian research demonstrates that correlations between indicators of disadvantage (such as unemployment and imprisonment) can be reduced considerably in areas where community support and spirit (known as community capital) is strong.

Retail and business development in Redfern will benefit from policies and practices that support the emergence of complementary retail clusters. This study has identified four Zones in the study area which are shown on the map on the next page.

Zone 1. Food and functional shops on Regent Street and Raglan Street, centred around the IGA supermarket.

Zone 2. Second hand furniture and cafes on the Western side of Regent Street.

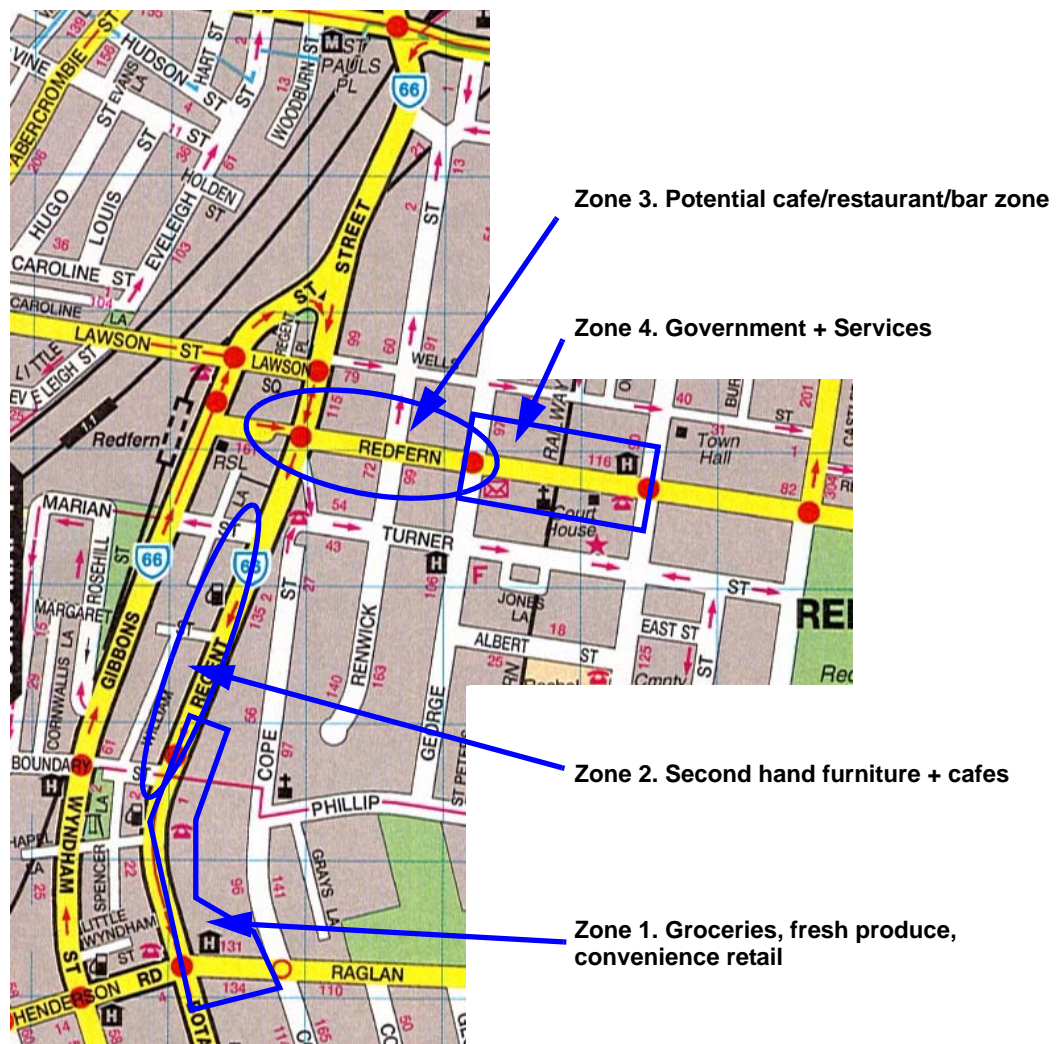
Zone 3. Redfern Street – the section between George and Regent Street has the **potential** to develop into a cafe/restaurant area operating during the day and evening. This potential is supported by the amenity of the street upgrade; ease of access by train, bus and road; and proximity to students and workers in the office buildings near the Station. The basis of this cluster is present in the current bars and cafes. In addition, the RSL Club plans a major upgrade, and the Post Office building is suited to a landmark restaurant or entertainment venue.



Zone 4. Redfern Street – the section between George and Pitt Street has a cluster of Government, Community and Employment service organisations. This will be reinforced with the Community Health Centre moves to this location.

Each of these Zones can be described as ‘emergent’, and each one has considerable scope for enhancement and growth.

Fig 31. Retail zones in study area



Implications for Business Precinct

The four emergent zones provide the foundation for building strong retail offers that are clearly visible to potential users and benefit from centre of gravity synergies.



5.3 Parking

Traditional strip retailers worry about parking and its potential impacts on their businesses. They look at shopping centres promoting abundant, free parking and forget that parking is a means to an end, not an end in itself. Parking allows people to drive to the places where they want to shop, play, or work, in the same way that buses, trains, cycling and walking allow alternative means of transport.

The decision to park a car at a destination follows a decision to, first, go somewhere, and, second, to drive there.

Parking at a destination then involves an unspoken type of cost/benefit analysis. Unless a parking spot is directly outside the store or service of choice, there is always a cost, regardless of whether or not the parking spot is free.

The 'cost' may be the time taken to walk to the destination, it may be the burden of carrying shopping back to the car, it may be the price of feeling insecure in a poorly lit street or an unmanned parking station.

In Redfern there is a sense that the cost associated with on-street parking meters is too expensive for the current retail offer, and in some senses this may be true. The current retail offer is ill-defined, characterised by high vacancy, and lacking a coherent critical mass.

This retail offer will not be improved by free on-street parking. Other efforts must be made to attract new businesses to Redfern. But there may be scope to better align the current 'costs' of parking in Redfern to the current poor retail mix.

The City of Sydney might choose to investigate a range of alternatives to better manage both the supply and costs of parking, e.g.:

- Ensure that businesses discourage staff from driving to Redfern and occupying parking spaces which would otherwise be available for customers.
- Encourage businesses to consider providing incentives for staff who use alternate options other than a car to travel to work.
- Encourage the Council to investigate variable pricing (different rates for peak and off-peak parking times).
- Encourage the Council to investigate short stay parking spaces for convenience trips.
- Encourage the Council to investigate the locations of loading zones.
- Conduct a behavioural (rather than traffic) study tracking the way people use Redfern and move between parking, shops and services. Such a study could investigate total time spent, distances walked and whether or not cars are moved in order to remain in Redfern but avoid parking fines.

The University of New England conducted an intriguing study in Armidale in 1995. In 'Tracking Armidale' Witherby and Baker analysed the movements of 170 shoppers from where they parked their cars to the shops visited on their trip. The results are summarised as:

1. The average walking distance for Armidale shoppers from the carpark centroids to



the furthest shop is 130 metres. The result is consistent with estimates from the USA.

2. The average walking distance for supermarket shopping from the carpark centroid is 95 metres.
3. The average time spent shopping was 25.4 minutes.
4. The average number of shops visited was 2.7 and this compared favourably with 2.8 from pedestrian surveys in Umea Sweden.
5. Time-constrained shoppers rely on their cars to provide them with space and time accessibility to a narrow range of shops.
6. The sequencing of trips demonstrated the importance of supermarkets and banks as the first stop in shopping. The location of supermarkets is pivotal to spin-off shopping and secondary visits on average would be less than 285 metres from the supermarket carpark location.

While Redfern is not a country town like Armidale, the study provides useful indications of shopper behaviour such as the sequencing of shopping trips, time spent and average walking distances. The 'Grocery, fresh produce and convenience retail' zone on Regent Street serves locals within walking distance, commuters who walk past as well as car-travellers who can park in nearby streets.

The Wahroonga Traffic and Parking Study¹ conducted in 2008 noted that the shift towards more cafe and restaurant establishments in the study area has led to more people seeking to park, particularly at lunch time, and that these people tend to park longer than other shoppers. If a section of Redfern Street is to be identified as a potential cafe/restaurant zone, provision will need to be made for adequate parking that suits this use.



Implications for Business Precinct

There may be scope to better align the current 'costs' (money costs and convenience costs) of parking in Redfern to the current poor retail mix by:

- modifying business and worker behaviour/expectations
- encourage Council review of some parking conditions
- commissioning a behavioural (rather than traffic) study tracking the way people use Redfern and move between parking, shops and services.

The Armidale study highlights the importance the integrity of the Four Zones identified at Redfern. The location of banks and supermarket will influence the viability of secondary businesses.

The Wahroonga study suggests that if a section of Redfern Street is to be identified as a cafe/restaurant zone then provision should be made for adequate parking that suits this use.

5.4 Communication: Cabramatta Case Study

During stakeholder workshops, Cabramatta was raised as a precinct which has managed to forge an identity as a foodie destination despite a focus (from time to time) on drug related crime.

In 1998, Nicole Sheridan and Ilona Van Galen of City Marketing Pty Ltd were retained by the NSW Premier's Department to prepare a 4 year Tourism Action Plan for Cabramatta. In 2002, we were again retained to review progress against the Plan and prepare new recommendations for the next four years.

The 1998 Tourism Action Plan identified that Cabramatta's strengths as an authentic fresh Asian food and restaurant precinct would be attractive to the emerging daytripper tourism market of gourmet 'foodies' prepared to travel to seek out new and exotic food experiences.

As a result of our recommendations to begin public relations activities, develop a Cabramatta media kit including a gourmet food brochure, and begin marketing to foodies under the positioning of 'Day Trips to Asia', Cabramatta received extensive positive media coverage in lifestyle media particularly during 1998, 1999, 2000, 2001 and 2002.

We recommended promoting gourmet food tours to Cabramatta, including a tour operated by local expert and renowned food writer Carol Selva Rajah.

Carol's Gourmet Asian Cuisine Tours continue to this day, as do Maeve O'Meara's Gourmet Safaris, which began including Cabramatta in 2000.

In 1998, the internet was still a fairly new means of communication for tourism promotion, and no websites promoted Cabramatta as a visitor destination. By 2002, at



least four mainstream tourism sites were using material from the Cabramatta media kit to expose the positive aspects of the precinct.

In 2008, Cabramatta is featured on about 20 major gateway sites, including:

www.eatability.com.au
www.openroad.com.au
www.gourmetsafaris.com.au
www.gourmetshopper.com.au
www.eatanddrink.com.au
www.yourrestaurants.com.au (ninemsn)
www.travelmate.com.au
www.discovergreatersydney.com.au

In 2008, the Lonely Planet BlueList describes Cabramatta as:

where (Sydney's) oriental action is. Stepping out of the train you feel like you've flown to one busy city centre in Asia, with street stalls and markets selling fresh grocery to Asian snacks. Pop into a local restaurant for a bowl of steaming hot noodle soup. You can't feel more oriental than this!

Between 1998 and 2002, the positive media attention and positive experiences associated with rising daytripper visitation to Cabramatta had lifted the overall mood of retail and business stakeholders. Cabramatta stakeholders continued to feel most positive whilst law and order issues were being addressed. Nevertheless a positive change in trading conditions meant that local businesses were prepared to provide funding support for new tourism initiatives identified in 2002.

From the outset, Cabramatta's Tourism Action Plan recognised that it could not and should not try to overcome negative press associated with real or perceived crime. Instead it was designed to leverage an authentic alternative aspect of the Cabramatta experience to generate alternative positive media coverage, carefully targeted to a specific audience.

The success of this strategy to address an image problem by providing the media with new information about unknown positives continues today, 10 years later. Cabramatta is now seen as a 'mainstream' gourmet destination – one of Sydney's Top 10 fine foodie destinations - and the precinct continues to benefit socially and economically from daytrippers from other parts of Sydney and regional NSW.

While Redfern does not currently have the strong product offer that was already established in Cabramatta in 1998, nevertheless, the approach of actively promulgating good news stories is relevant to Redfern.



Implications for Business Precinct

To be most effective in supporting business development, the stories should relate to products and services available in Redfern, and to events/activities that give people a reason to visit Redfern.

5.5 Business Organisations

Local businesses can be a powerful force that in the revitalisation of a business precinct, especially if they cooperate to coordinate business activity and promotion. There are a number of frameworks that foster cooperative action amongst local businesses:

- Traditional Chamber of Commerce
- Main Street Program
- Business Improvement District
- Business Coordinator/Precinct Manager/Place Manager

Traditional Chamber of Commerce

Chambers of Commerce provide their members with key advantages:

- a channel of communication with government to input policy making;
- a forum for meeting other business people to discuss key issues and meet potential clients, suppliers, partners and competitors.

Australia has had a Chamber of Commerce since 1826 when the Sydney Chamber of Commerce was established.

The Redfern Waterloo Chamber of Commerce has been re-invigorated in 2008 and is poised to implement activities that will build on the 2007 street upgrade. A new Executive has targeted three priorities for the coming year:

- Membership growth
- Support of the “Roll up Redfern” removal of shutters initiative
- Sustainable funding support for the appointment of an Executive Officer for the Chamber

Relative to other business precincts in the City of Sydney, Redfern has fewer business premises and a high vacancy rate. In addition, a proportion of businesses serve the lower end of the market where margins are tight. These factors limit the resources (numbers, time and money) that are available to Redfern businesses to undertake cooperative activities.



Main Street Program

Main Street programs originated in the United States 25 years ago with a community-driven methodology used to revitalize older, traditional business districts. The popularity of the program is evident in its uptake with 1,200 active Main Street programs in the US alone.

The underlying premise of the Main Street approach is to encourage economic development within the context of historic preservation in ways appropriate to the marketplace. The Main Street Approach advocates community self-reliance, local empowerment, and the rebuilding of traditional commercial districts based on their unique assets: distinctive architecture, a pedestrian-friendly environment, personal service, local ownership, and a sense of community.

The program has four elements:

- **Organization** involving a governing board and standing committees to structure the the volunteer-driven program. Volunteers are usually coordinated and supported by a paid program director. This structure not only divides the workload and clearly delineates responsibilities, but also builds consensus and cooperation among the various stakeholders.
- **Promotion** of a positive image of the commercial district to encourages consumers and investors to live, work, shop, play and invest in the Main Street district. Promotion strategies include advertising, retail promotional activity, special events, and marketing campaigns carried out by local volunteers.
- **Design** of the physical environment to capitalize on assets such as historic buildings and pedestrian-oriented streets. An inviting atmosphere, created through attractive window displays, parking areas, building improvements, street furniture, signs, footpaths, street lights, and landscaping, conveys a positive visual message about the commercial district and what it has to offer. Design also includes good maintenance as well as rehabilitating historic buildings, encouraging appropriate new construction, developing sensitive design management systems, and long-term planning.
- **Economic Restructuring** strengthens existing economic assets while expanding and diversifying the economic base. The Main Street program helps sharpen the competitiveness of existing business owners and recruits compatible new businesses and new economic uses to build a commercial district that responds to consumers needs. Converting unused or underused commercial space into economically productive property also helps boost the profitability of the district.

The National Trust Main Street Center¹ advises that for a Main Street program to be successful, it must embrace Eight Principles.

- **Comprehensive:** For successful, sustainable, long-term revitalization, a comprehensive approach, including activity in each of Main Street's Four Points, is essential.
- **Incremental:** Successful revitalization programs begin with basic, simple activities

1. Source: www.mainstreet.org



that demonstrate that new things are happening in the commercial district. As public confidence in the Main Street district grows and participants' understanding of the revitalization process becomes more sophisticated, Main Street is able to tackle increasingly complex problems and more ambitious projects. This incremental change leads to much longer-lasting and dramatic positive change in the Main Street area.

- **Self-help:** No one else will save your Main Street. Local leaders must have the will and desire to mobilize local resources and talent.
- **Partnerships:** Both the public and private sectors have a vital interest in the district and must work together to achieve common goals of Main Street's revitalization. Each sector has a role to play and each must understand the other's strengths and limitations in order to forge an effective partnership.
- **Identifying and capitalizing on existing assets:** Business districts must capitalize on the assets that make them unique. Every district has unique qualities like distinctive buildings and human scale that give people a sense of belonging. These local assets must serve as the foundation for all aspects of the revitalization program.
- **Quality:** Emphasize quality in every aspect of the revitalization program. This applies to all elements of the process — from shopfront designs to promotional campaigns to educational programs.
- **Change:** Changes in attitude and practice are slow but definite — public support for change will build as the Main Street program grows and consistently meets its goals. Change also means engaging in better business practices, altering ways of thinking, and improving the physical appearance of the commercial district.
- **Implementation:** To succeed, Main Street must show visible results that can only come from completing projects. Frequent, visible changes are a reminder that the revitalization effort is under way and succeeding. Small projects at the beginning of the program pave the way for larger ones as the revitalization effort matures.

Business Improvement District

A business improvement district (BID) is a public-private partnership in which businesses in a defined area elect to pay an additional tax in order to fund improvements to the district's public realm and trading environment. A BID is, in some ways, similar to a residential community association, but an appropriate analogy would be that of a suburban shopping mall, from which the idea for BIDs is modelled. Malls are generally single properties managed by one entity that rents out retail spaces to various tenants. Tenants pay a common maintenance fee to pay for services that enhance the appearance of the mall's common areas and provide cooperative advertising for the mall and its various stores. BIDs operate in much the same way.

BIDs are often grassroots organizations driven by community support. They do, however, require legislative authorization by the government in which it resides, in order to be established.

BIDs typically provide services such as street and footpath maintenance, public safety officers, park and open space maintenance, marketing, capital improvements, and



various development projects. The services provided by BIDs are a supplement to the services already provided by the municipality.

BIDs began in the United States, and have been established in Canada, UK, Germany. The number of BIDs is an indication of their current popularity:

There are 57 BIDs within New York City. Toronto has 60 BIAs within its city limit. In the province of Alberta, they are termed “business revitalization zones” and there are nine zones in the city of Calgary and 10 in Edmonton.

In Australia, a group of Gosford City Centre business operators and property owners set up a BID in 2008 in collaboration with Gosford City Council¹. They note that

This BID enables business and property owners to decide which services - over and above those already provided by Council - are needed to meet Gosford's needs and to devise ways to deliver them.

It will be funded by the CBD Special Improvement levy that has been in place for many years and originally helped build the Baker Street Car Park, and upgrade both the Mann Street and Kibble Park.

www.gosfordcity.com.au/index.php

Local Business Coordinator/Precinct Manager/Place Manager

Place Manager is a funded role that provides resources and consistency for planning, implementing and coordinating business activities. The role can give local business precincts some of the power of indoor shopping centres to guide cooperative activities such as physical improvements, marketing, operating hours and parking arrangements.

The success of any Business Improvement Strategy depends on coordinated and sustained implementation and follow-through. This requires persistence, commitment and energy.

A Place Manager would carry forward the recommendations of this Study, to guide their implementation, application and dissemination. If resources permit, Council could consider appointing a Place Manager.

Implications for Business Precinct

The Redfern Waterloo Chamber of Commerce is active and focused. It needs support and encouragement to develop its activities so it can make an important impact on local trading conditions.

Council could appoint a Local Business Coordinator to contribute expertise, time and energy, along with consistency of effort over an extended time.

It is important to match expected outcomes with the magnitude of the task and the resources available to bring about change. Stakeholders should be realistic about what can be achieved in the short term.



6. Future Directions

This study has identified a future direction for helping the business area develop into a thriving commercial area that serves locals and visitors.

The aim is to establish a platform of socio-economic development for the Redfern town centre. It should be recognised that the town centre is at a low point in its economic cycle and that the path towards revitalisation will take considerable time and resources.

Business renewal requires coordinated activity on several fronts simultaneously and it takes time to lay the foundations in several spheres. Recent City of Sydney investment in street, park and oval upgrades in Redfern were an essential element. The aim for the next five years will be to lay similarly effective foundations in other important spheres.

In five years time, the Redfern Business Precinct should see some signs of improved trading in terms of lower vacancy rates, improved condition of shopfronts, and coordinated promotional activities, supported by higher profile community events.

This will be an important step towards building the business base and fostering commercial enterprises while maintaining a healthy socio-economic balance. It will lay the foundations for sustainable development towards a mature local economy.

This section sets out a Vision for the future of the Redfern business precinct and essential actions that will support the Vision.

In summary, the Vision is that Redfern will be seen in the wider community as a unique, authentic, positive and attractive place to visit and shop. This Study supports the following vision.

Redfern will be known as an edgy, alternative, urban, gritty, artistic precinct with a specialty focus on Indigenous art, culture and enterprise.

The table on the following page summarises the six steps towards achieving this Vision.



Issue	Direction	Strategy
1. The Offer Redfern currently has a limited retail offer with restricted appeal. There is a high shop vacancy rate.	Develop a suitable mix of business offers relating to the core identity.	Prepare and implement a Targeted Tenancy Plan.
2. Image & Branding Redfern has a reputation for social problems and lack of safety.	Communicate compelling reasons to visit Redfern and use the businesses.	Commission good-news Fact Sheet campaign and a Brand and Marketing Strategy.
3. Physical Place Run down buildings and roller shutters detract from the amenity of the precinct. Parking is limited and one-way traffic on Regent Street fragments the business precinct.	Clean and fresh shopfronts will present interesting visual information to visitors. Visitors know where to park conveniently and will enjoy the streetscape.	Remove shop shutters and activate shops with displays. Encourage property owners to upgrade/redevelop buildings. Enhance the public domain with 'soft' elements that encourage people to pause or stay longer. Review parking arrangements and develop strategies. Initiate discussions to remove the one-way traffic arrangements. Review planning instruments to avoid generic architecture and sub-optimal retail spaces.
4. Local Business Coordinator/Place Manager Local businesses have limited capacity to contribute to economic revival.	Businesses will be supported in their initiatives to attract new business, promote the area and encourage better business practice.	Council could consider the appointment of a Local Business Coordinator/Place Manager.
5. Events Redfern is perceived as still the same old problematic place.	A calendar of activities, events and promotions will establish perceptions of Redfern as a dynamic and interesting locale.	Develop a unified calendar of events. Identify one new signature event that could encapsulate the vision for Redfern.
6. Social Character Social problems dominate perceptions of Redfern. Beggars and alcohol/drug-affected people interfere with shoppers.	Redfern will be known for its inclusive, multi-faceted community. It will be recognised as a pleasant and friendly precinct.	Develop a communication strategy that tells the good news stories. Establish a cross-agency working party to consider ways to reduce negative effects on public domain. Review location of services to avoid negative impacts on business.



The Vision

What is this place about?

The issue. *Successful business areas/precincts have a recognisable character that is both distinctive and positive. Their appealing character attracts current users to come again, and also draws new users. Where does Redfern stand and how does it create a strong, positive identity for the future? What does it want to be known for?*

At present, Redfern is better known for its problems than for its assets. While community and business agree that this should change, the way forward is often seen more clearly in negatives, i.e. what Redfern should NOT be rather than a clear vision for a positive identity – not a failure, not gentrified, not a clone made up of franchise stores. Or the vision is very general – successful, vibrant, attractive.

The first step forward is to identify a specific kind of business precinct that will guide activities and energise them, that is, develop a Vision. To be believable, the Vision should be **authentic**; to be powerful, it should be **unique**; to be useful it should be **achievable**.

Redfern is widely perceived as the main centre of the Aboriginal community in Sydney. Indeed, Redfern has iconic status among Aboriginal people Australia-wide. With respect to local business, this has the potential to become a strong positive quality, nevertheless, it has, in the past, often been characterised by social problems.

The potential to become the focal point of a strong and positive Aboriginal culture that engages with the wider community through both commercial and social exchanges is a unique positioning for Redfern. This is a very powerful possibility, because no other precinct in Sydney can occupy this positioning with authenticity.

Redfern could be known internationally as THE centre for Aboriginal art and culture.

Business owner, 2008

A core challenge will be to foster and develop a number of Indigenous enterprises that offer opportunities for commercial engagement with Indigenous arts, heritage and culture.

Support for this direction can be found in the regular cultural activities around the Redfern Community Centre, the new Indigenous media centre for Koori Radio in Cope Street, and the City of Sydney 2030 Sustainable Sydney Strategy proposal for the Eora Journey from the Harbour to Redfern, and a proposed Australian Indigenous Cultural Centre.

Redfern will be restored to a beautiful and historic inner-city village.

Lord Mayor, Clover Moore, 2007

A Vision is a destination, or a point on a compass to guide the traveller. It may have more to do with where you go than where you are now. Nevertheless, to be authentic, it needs to speak to the present as well as the future.



Future Direction. This study found support for a Vision of Redfern as edgy, urban, authentic, Indigenous, and thriving.

- **Redfern will be known as an edgy, funky, alternative, urban, gritty, interesting, artistic and creative shopping strip with a specialty focus on Indigenous art, culture and enterprise.**

The following table sets out the current strengths and weaknesses of Redfern with respect to this vision.

Strengths	Weaknesses
Attractive public domain that is newly upgraded	Lack of Aboriginal enterprises
Historic village character	Lack of variety in speciality retail offer
Strong sense of community	Limited parking
Mix of small retail stores	Run down buildings / ugly shop shutters
Excellent public transport access	Reputation as unsafe
Available premises	One way traffic on Regent Street is not conducive to leisure shopping

This Vision supports a range of uses:

- an attractive and relaxed place for passing time and shopping
- unique/specialty goods and services that are attractive to people outside the area
- a place to shop in varied ways, e.g. indoors and outdoors
- a place to meet locals and people from other places
- a place to eat outdoors and enjoy the village-scale setting
- a place to access arts and culture through book shops, art galleries, places of learning (school, workshop, community centre)
- a place to buy specialty foods (organic, Indigenous, hand made, etc.)
- a convenient place for locals to meet daily needs.

The Vision is grounded in current reality, however it offers a strong direction for future development. In the next few years of business development in Redfern, this Vision will be more of a private goal than a public statement about the place now. In effect, the place will grow into the Vision in a process that may take years of transformation to achieve.

In this Vision, the economic development of the business area will be supported by educational and cultural resources/services that can contribute to a comprehensive lifestyle experience.



As a Distinctive Local Retail Strip, Redfern will be similar in scale and coherence to other nearby retail centres, including Danks Street, Erskineville and Newtown. A key defining difference that can make the Redfern experience compelling will be the depth and variety of enterprises that offer goods and services related to contemporary urban culture and Indigenous arts and culture.

The Strategy. Promote a shared vision for Redfern as edgy, funky, alternative, urban, gritty, interesting, artistic and the Gateway to Urban Indigenous Heritage and Culture.

Timeframe. The Vision should be adopted immediately as the foundation for all business development activity. As business develops over the years, the Vision can be reviewed for its relevance and power to energise ongoing activity.

The Outcome

Redfern businesses will have a clear view of how to develop the area to attract shopper and visitors to come to Redfern for a unique shopping and recreational experience. Redfern will present itself as a Distinctive Local Retail Strip that offers a balance between indoor and outdoor experiences of retail, food and entertainment in an attractive and safe village setting.



6.1 The Offer

Why would I go there?

The Issue. *A good mix of appealing shops and services is essential to a thriving business area. Redfern currently has many empty shops and a limited range of shops/businesses. Shoppers interviewed in this study identified the lack of shops/cafes/restaurants as the main restriction on using the retail area more often.*

Distinctive Local Shopping Strips are often characterised by their retail mix which may take many different characters. While large retail centres operate with strongly defined retail mixes, local shopping precincts that offer lifestyle experiences are able to sustain a wide variety of retail themes and combinations of shops/businesses.

Some of these variations appear due to locational or historic factors. For example, Leichhardt became known for Italian food when Italian migrants gravitated there after WWII, and Willoughby attracted a cluster of home renovation suppliers when older houses on the North Shore needed renovation or extension.

Some of Sydney's local business precincts with clear identities are shown here. In most cases, the precinct provides 'enough' of a particular type of shop/service to constitute a centre of gravity around which supplementary retail develops.

Locality	Focus	Comment
Crows Nest	Restaurants and furniture shops	The furniture shops continue to spread along the Pacific Hwy, as the precinct expands towards St Leonards.
Cabramatta	Vietnamese food and goods	Strategic marketing helped build the positive image of the retail centre.
Penshurst St & Willoughby Rd, Willoughby	Renovator services and supplies	Renovator supply shops are expanding into nearby streets.
Petersham	Portuguese food and culture	The Annual Festival helps maintain the Portuguese character of this shopping strip.
Leichhardt	Italian food and culture	Post-war Italian migrants clustered here.
Danks Street	Design, decor and food	The Danks Street Depot put the area on the map.
Balmain	Restaurants, books and decor	The Balmain markets (hand crafted goods) were a major stimulus for development of the retail area.
Newtown	Food and funky clothing/decor	Influence of local student population.
Chinatown	Restaurants and low-price markets	Historic market precinct.



As well as having a core offer, successful retail strips have a combination of shops and services that create synergies and boost business for all concerned. Some key synergistic elements are:

- Food retailers
- Food and beverage outlets
- Banks/ATM, PO, newsagent
- Medical (doctor, dentist, chemist)

In particular, food retailing is of strategic importance to many suburban shopping strips as it accounts for a high proportion (42%) of total retail spending in Australia. A strong food retailer is an important anchor because supermarket users are more likely than other shoppers to use at least one other store during their visit.

Retail gaps should be identified, including type of business such as distinctive one-off retail, retail for local community needs, creative industry sector uses, niche professional businesses, accommodation, and activities for leisure and tourism.

It is important that analysis recognises the intended character of the retail area as a Distinctive Local Retail Strip. As such, it is likely that national brand name shops will not be ideal choices for the Redfern area.

As well as considering the mix of retailing, the physical layout of business premises can have an important impact on profitability. For example, when food retailers like bakers, greengrocers and butchers are located close to a supermarket, all of the shops perform better. The IGA supermarket on Regent Street comprises the focal point for a cluster of functional shops, including food, discount, DVD rental, pharmacy, medical centre, newsagent, convenience and pub, etc.

Another important consideration is the combination of daytime economy and evening economy of the area.

Local business precincts cannot have the same degree of control over retail tenancies as private shopping centres. However they will benefit from adopting similar strategic directions and using the available means to steer the tenancy mix towards more fruitful combinations. For example, Redfern businesses could work with the Council, land owners and Real Estate professionals to:

- coordinate property and tenancy interests;
- raise funds;
- research market trends;
- implement strategies;
- improve the physical presentation of the business area;
- implement joint marketing and promotional campaigns.

Currently, Redfern has a high proportion of services and businesses that serve the socially disadvantaged community of the local area. These include, for example, Centrelink, Employment Service Providers, Community Services, Two Dollar shops and take away food stores. As these businesses meet real needs of the local



community, it is likely that they will continue to serve their constituents while new businesses are established to serve new residents/workers and to attract visitors.

Strategic planning for new businesses in Redfern should take account of four thematic zones in the retail area:

Zone 1. Food and functional shops on Regent Street and Raglan Street, centred around the IGA supermarket.

Zone 2. Second hand furniture and cafes on the Western side of Regent Street.

Zone 3. Redfern Street – the section between George and Regent Street has the potential to develop into a cafe/restaurant area operating during the day and evening.

Zone 4. Redfern Street – the section between George and Pitt Street has a cluster of Government, Community and Employment service organisations.

Future Direction. New businesses will be attracted to serve new residents/workers and to attract new markets. Businesses will be located within the Redfern Retail Strip to maximise potential synergies.

The following table sets out the current strengths and weaknesses of Redfern with respect to this direction.

Strengths	Weaknesses
There is a good supply of vacant premises available for new businesses to enter the area.	The current retail mix is quite limited.
There are strong opportunities to serve new markets as the current offer is very narrow.	The IGA and adjacent food retailers are quite distant from the Redfern Street strip.
Redfern Street suits outdoor dining.	One-way traffic on Regent Street limits the potential for leisure retail, despite attractive paving and trees.
Growth on the ATP site will bring large numbers of new workers to the area.	Poor connectivity to ATP/Eveleigh.



Regent Street – trees provide attractive setting



The Strategy. Prepare a Targeted Tenancy Plan that identifies retail mix and location issues and suggests ways to move towards a more effective mix of shops and businesses in both the short term and the longer term.

The Targeted Tenancy Plan should identify key properties (e.g. the Post Office building and the shops on the very visible corners of Redfern Street and Regent Street) and consider high profile businesses for these locations. These businesses will play a key role in establishing to the Vision for the Redfern Retail Area.

Timeline. The Targeted Tenancy Plan should be commissioned as soon as possible because it is vital to improve the retail offer. The Plan should address immediate or interim steps as well as longer term activities.

The Outcome. An interesting range of retailers and commercial businesses that align with the agreed Vision for the precinct and serve the local community of residents and workers while attracting visitors from outside the area.



6.2 Image and Branding

Getting the word out

The Issue. *The Redfern retail area is widely regarded as having a negative image. In the shopper survey in our study, negative perceptions of Redfern were mentioned by both locals and non-locals: Unsafe and violent, bad image of junkies and drugs, low income/beggars and dirty/unkept. Many of these negative images were mentioned slightly more by locals than by non-locals.*

Redfern stakeholders were adamant that the negative image of Redfern belies its experience as an edgy, funky, alternative, urban, interesting, artistic and creative, vibrant mixed enterprise precinct in a heritage setting. They tended to see Redfern as relaxed, friendly and multicultural, and saw it as an up and coming area.

They are anxious to undertake work to realign perceptions and to improve Redfern's image through professional place Branding.

Future Direction. Communicate compelling reasons to visit Redfern and use the businesses. This should be done through two means:

1. Fact Sheets
2. Professional Place Branding

Fact Sheets

There is an immediate need to disseminate good-news stories about Redfern, especially stories about:

- Redfern as a pleasant place to visit
- Redfern businesses and creative enterprises.

These good-news stories will not aim at attracting shoppers/visitors directly and they will not depend on a strong retail offer, because this does not exist at present. Instead, they will bolster impressions of Redfern as an interesting suburb that is evolving into something new.

Redfern should consider engaging a professional writer with media contacts to develop a series of fact sheets about the positive (edgy, funky, alternative, urban, gritty, interesting, artistic and creative, exciting, vibrant mixed enterprise precinct in a heritage setting) aspects of the precinct.

The fact sheet stories should not seek to 'counter' any negative perceptions of Redfern but should instead present the positive aspects in their own light.

They should be targeted at appropriate media (edgy, funky, alternative, urban, artistic, creative, heritage) or the relevant sections within mainstream media.



Professional Place Branding

At the same time, it is important to prepare a more comprehensive Brand Strategy to establish an identity for Redfern that will attract shoppers and visitors.

Stakeholders recognise that place Branding does not merely attach new labels. A clear and effective Brand is:

- Based on truth
- Unique to its owner
- A summary of all the things, tangible and intangible, that no-one else owns.

For many precincts in search of a Brand, the natural reaction is to design a new logo or begin using a new tagline. In fact, logos and taglines are not Brands, they are simply elements of a Brand expression, a way to consistently communicate the unique experience that is the true personality of the place.

A Brand Expression can be words, an image, a tagline, or a combination of any of these.

Three guidelines should underpin the creative process:

- The Brand Expression for Redfern must express the Unique Qualities, Personality and Promise of Redfern;
- The Brand Expression for Redfern will not replace the existing identity of Redfern Waterloo Chamber of Commerce; and
- The Brand Expression for Redfern must be designed to co-exist with other identities and expressions — the logos of government and non-government organisations.

A Brand does not exist on paper: it exists only in the mind of the consumer. It is the sum of what the market thinks when it hears the Brand name. It is the set of expectations the customer holds about the product or place, and the scale against which the actual experience of the product or place is measured.

‘Destination BrandScience’, a 2005 publication, goes further by suggesting that place Branding relies on a community wide commitment to the elements that differentiate one place from another, as well as a community wide effort to effectively communicate and create that unique destination experience for the customer. Rather than advertising based, place Branding focuses on delivering an exceptional experience that is memorable and emotional.

Everything about the experience (the buildings, the stores, the service, as well as advertising, events, promotions, signage, web presence and logos) must express the Brand qualities to build and support the Brand.

The process of building a Brand takes time and money. The more money, the less time is required. Conversely, the less money, the more time it takes to ‘fix’ the Brand into the minds of consumers.

Most local governments and/or business groups do not have the financial resources to successfully launch a community Brand on their own.

For Redfern, partnership between Council and the community will be necessary to launch and consolidate the Brand. A key strategic question to be answered is who



should be the Brand Custodian: the ultimate manager and leader of the Brand who encourages consistency of use amongst all stakeholders.

The key to successful Brands is effective Brand Management, the maintenance of consistency in positioning, personality and distribution of the Brand message. The City of Sydney Council must provide the leadership to unite community partners and become the focal point to add value through the combined marketing efforts of multiple precinct stakeholders.

The Business Coordinator, recommended in this Study, may be the effective Brand Custodian, leading the process of developing the Brand Expression and investing time and money into gaining acceptance, adoption and implementation of the new Brand.

The Brand Custodian will lead by:

- Developing the Brand Expression (which may or may not include a logo and tagline)
- Identifying the various ways that the Brand Expression can be used by different stakeholders
- Making it as easy as possible for external stakeholders to communicate the Brand
- Ensuring that activities, events and communications pieces work together cohesively to build the Brand.

Unless a Brand is adopted, supported and given 'life' by a community's stakeholders it will never be anything more than an image or tagline on a piece of paper. It is essential that the Business Coordinator focus on engaging the efforts and resources of the Redfern community.

Fortunately, it seems that many Redfern stakeholders are poised to become 'Brand Champions' if they are provided with consistent tools and messages. Brand champions are energetic supporters who spread and protect the brand vision and values.

Strategy. Adopt a two-pronged approach to –

- Commission a series of Fact Sheets for disseminating good-news stories to appropriate media.
- Develop a creative brief to develop the Brand and Marketing Strategy, especially the Brand Expression, through a professional Place Branding exercise.

Timeline. The **immediate and ongoing** need is to commission the Fact Sheets that will disseminate good news stories about Redfern.

The **next step** is to commission a Place Branding exercise in 2009. The exercise will help to activate and focus relevant stakeholders early in the rejuvenation process, and it will be foundational in sharpening all subsequent activity.

In the longer term, the Eora Journey will help reinforce the desired vision for Redfern.



Outcome. Redfern will gradually become better known for the positive aspects of its character and a new perception of Redfern will become established to support business activity in the area. Businesses and stakeholders will have a common view of the emerging character of the Redfern town centre and they will have some resources that help them champion that view.



6.3 Physical Place

What is it like there?

Issue. *The street upgrade has improved the physical amenity of Redfern Street, but many retail properties are rundown or present blank facades to the street due to roller shutters and security bars. The area is widely seen as relatively unsafe. Regent and Gibbons Streets are one-way and this creates an unsympathetic environment for pedestrians making it less pleasant to shop there. How can the physical setting, sense of safety and retail architecture be improved?*

Rundown buildings and 'ordinary' architecture. While many older buildings in the business area have very attractive historic architectural characteristics that could bring decorative charm to the streetscape, they are often poorly maintained or compromised by unsympathetic renovations.

In addition, many shop fronts show the build up of traffic grime because they are not cleaned regularly. This applies to new premises as well as old premises. Rundown and dirty buildings are not consistent with a thriving retail area.

We're aiming for character without grunge.

Business owner, 2008

In a number of instances, old buildings have been replaced with 'generic' modern buildings that lack character and local identity.

In consultation, stakeholders expressed concerns that character-laden old buildings will be replaced by bland architecture that is inconsistent with a local character of 'edgy, funky, creative and gritty'.

Roller shutters and security grilles. The predominance of roller shutters and aggressively obvious security grilles in the retail area conveys the sense that Redfern is a high-crime area.

The Redfern Local Area Commander advised a Redfern Waterloo Chamber of Commerce Business Forum that some crime rates in the locality are falling. The Bureau of Crime Statistics and Research reports that the following categories of crime have fallen by 8-9% in the past 5 years in the Sydney LGA: Break and enter (non-dwelling), motor vehicle theft, stealing from person. Retailer theft appears to have remained constant in the LGA.



Contemporary buildings on Regent Street



Shutters on Redfern Street



It is likely that perceptions of safety may not reflect current crime rates in some cases.

Stakeholders in this study thought that shutters and grilles 'sucked life out of the streets' by presenting blind fronts that offered nothing to pedestrians or passing cars.

Parking. Business stakeholders noted that the Redfern Street upgrade has reduced parking availability and they felt this was affecting their businesses. Owners of discount/economy businesses noted that parking fees were unacceptable to their clients, however, it must be noticed that the Shopper Survey found that 89% of locals walk (not drive) to the Redfern shops.

One way streets. Regent Street and Gibbons Street are one way streets that encourage fast flows of through-traffic. As such, they discourage drivers from stopping in the area and make it harder for pedestrians to cross the road and get around.

Sections along Regent Street with 'no parking' mean that there is no buffer zone to protect pedestrians from fast moving traffic in these sections. These areas are hostile to pedestrians.

Viable shops. Shop designs that are separated from the footpath or isolated from main pedestrian pathways (e.g. on 'island' developments) may not provide the necessary conditions for thriving retail businesses. Similarly, too many shops with small floorspace will limit the range of businesses that can be effective in the area.

Goals. Clean and fresh shopfronts will present interesting visual information to passers-by. Visitors know where to park and they enjoy the streetscapes, protected from fast moving traffic.

Strategy. Implement programs to remove shop shutters and aggressive security bars, and clean and activate empty shops with displays.

Encourage property owners to upgrade/redevelop buildings to maintain the traditional character of the area. Consider Heritage Paint Scheme incentives and the Terrace Pattern Book model.

Review parking arrangements and develop appropriate strategies.

Initiate discussions with a view to removing the one-way traffic arrangements on Regent Street and Gibbons Street.

Review planning instruments to ensure:

- they do not foster bland and generic architecture
- they encourage new retail spaces that are well-designed for commercial effectiveness.

Liaise with the Redfern Waterloo Authority to support effective retail architecture on the Western side of Regent Street.



Timeline. The **immediate and ongoing** need is to implement a program to remove shutters and external bars from shop fronts in Redfern town centre, and to clean and activate empty shop fronts.

In 2009, it will be important to:

- Initiate discussions with a view to removing the one-way traffic arrangements on Regent and Gibbons Street.
- Encourage property owners to upgrade/redevelop buildings to maintain the traditional character of the area (e.g. Terrace Pattern Book).
- Review parking arrangements and develop appropriate strategies.
- Liaise with Department of Planning to review planning instruments to ensure they do not foster bland and generic architecture and that they encourage new retail spaces that are well-designed for commercial effectiveness.
- Liaise with RWA to support effective retail architecture on the Western side of Regent Street.

In the longer term, the Eora Journey project may bring a focus that supports on Indigenous art and enterprise, and also enhances the public domain.

Outcome. Redfern will offer attractive settings that will encourage shoppers and business users to stay longer and use the local facilities. Visitors will be encouraged to move around the area to discover interesting businesses and experiences.



6.4 Local businesses – Business Coordinator/Place Manager

What can business do?

Issue. *Local businesses have not optimised the benefits of cooperative activities. How can local businesses be helped to play a more effective role in renewal of the Redfern Business Precinct?*

Businesses in the Redfern town centre have faced more than a decade of economic decline as the local economy has deteriorated. This decline has sapped energy and resources, and drained capacity from the business community. The recent street upgrade was welcomed by business, but it added further stress to trading conditions during implementation.

For local businesses to play a part in the renewal of the Redfern Business Precinct, they will need support in re-energising cooperative structures and activities. In addition, the skills involved in running a small retail business are quite different from the skills required to initiate and coordinate precinct-wide activities.

A Local Business Coordinator/Place Manager would be a useful resource to the business community. This role, should it be possible, would provide continuity of direction and effort over the coming years and would coordinate and support the voluntary contributions of those participating in local business organisation committees.

A Local Business Coordinator/Place Manager would work with all stakeholders including business operators, land owners, RWA, City of Sydney, service providers and community organisations, to foster consensus on long-term goals for the local economy and the steps required to achieve them.

Some roles a Local Business Coordinator/Place Manager would undertake would be:

- Liaise with all stakeholders to confirm the long term Vision as articulated in this study.
- Draw up a timeframe for implementing the specific steps outlined in this report, taking account of the available resources for implementation.
- Oversee implementation of the specific steps outlined in this report.
- Be a point of communication between businesses, local organisations, RWA and Council.
- Identify funding sources and opportunities to secure contributions from local businesses, landowners, RWA and Council.

Strategy. Consider the appointment of a Local Business Coordinator/Place Manager.

Timeline. This appointment would be most useful in the early phases, so that the program of renewal activities can be coordinated for more effective implementation.

Outcome

The Local Business Coordinator/Place Manager would support local business and other stakeholders in implementing business renewal.



6.5 Events

What's going on?

Issue. *While local residents, shoppers and businesses have a sense that Redfern is changing for the better, others see Redfern as the same old problematic place. How can the local business community show that Redfern is on the move?*

Stakeholder meetings in this study provided opportunities for businesses and community members to share information about local events and activities. Many participants were surprised to hear about events such as 'Gathering Ground' which were only dimly perceived.

Why aren't there posters up in shop windows?

Business operator, 2008

There was considerable enthusiasm for past community events like the old Redfern Festival, or proposed markets at the Carriageworks. If markets are to be developed for Redfern, it is important that they complement existing businesses and do not compete with them. They should include genuine art/craft/designers rather than the professional itinerant stallholders who sell mass produced things produced offshore. Ideally markets in Redfern should focus on:

- Indigenous design
- Gourmet Indigenous food

During the consultation for this study, the Chamber constituted a sub-committee to help coordinate a major community festival event in 2009. However, while local business people are well-motivated and have ideas for improvement, they are limited by the time they can devote to the range of initiatives that are necessary for economic renewal.

Strategy. Develop a unified calendar of all existing events/activities/promotions in Redfern. This calendar should be widely disseminated and kept up to date.

Identify one new key event that could encapsulate the vision for Redfern, such as a spectacular community festival that involves retailers as well as entertainment and community participation. Work to establish that as a signature event for the future.

Timing. There is an immediate need to draw up a unified calendar of events/activities/promotions that are currently offered. Work should begin now to identify a signature event and plan for an inaugural offering in 2010.

Outcome. Redfern will be known for its inclusive, multi-faceted community. It will be recognised as a pleasant and friendly area with interesting shops and places to visit.



6.6 Social character

The Issue. *Successful business precincts attract and serve diverse customers. The Redfern locality is home to a high proportion of socially disadvantaged people. This has resulted in a low income base for local retailers and there are socially inappropriate behaviours in the public domain which restrict the commercial appeal of the area. How can these factors be ameliorated?*

At present, Redfern and Waterloo have a high proportion of public housing properties, so that 90% of dwellings in Waterloo are owned by the Department of Housing.

The area also includes many long-time residents who are proud of the suburb's working class heritage. However, the unemployment level of the Inner South is double that of Metropolitan Sydney.

More control over 'undesirables', including drunks, beggars and people involved with drugs.

Business owner, 2008

The Redfern area is undergoing significant urban renewal as new apartments replace rundown industrial, educational and medical facilities. Population estimates provided by the City of Sydney forecast the following increases in residents and workers in the broad Redfern/Waterloo area between 2006 and 2031.

Table 17. Population growth estimates

	2006	2031	Increase
Residents	20,250	30,231	9,981
Workers	8,875	25,258	16,474

Source: City of Sydney, Summary estimates of residential population and employment, 1996-2031. Preliminary Data.

Professionals and young families are moving into the new dwellings, and over time this will create a new social mix. This change in the local population catchment will provide opportunities for new businesses that serve the new residents and workers. It may also contribute to renewed social pressures to implement moves that abate antisocial behaviours.

A key issue raised in the Business Forums relates to the location of social support facilities for disadvantaged groups and the impact on local businesses. Business owners had the strong view that it is not appropriate to locate some facilities close to businesses that serve the general public because the user groups are not compatible. In Redfern, there were objections from the business community to the location of the Needle Van in a residential area, and there were objections to the proposal to move the Methadone Clinic to Redfern Street as part of the relocation of the Community Health Centre.



Future Direction. Redfern businesses will expand to serve new community members while also providing for current residents and workers. Businesses will contribute to a tolerant and inclusive society that values pro-social behaviour.

The following table sets out the current strengths and weaknesses of Redfern with respect to this future direction.

Strengths	Weaknesses
City of Sydney has a 2007 Local Action Plan that addresses issues of antisocial behaviour in the public domain, e.g. Alcohol Free Zones and Graffiti Removal.	There are communication gaps between agencies (such as the police and social service providers) and local business and resident communities.
The Chamber of Commerce is invigorated to represent local businesses and provide a channel of communication between agencies and businesses.	
Police liaison with the local community is active. Local crime rates have fallen in past year ^a .	
There is a good supply of vacant premises available for new businesses to enter the area.	

a. Verbal communication of Local Area Commander to Redfern Business Forum, 2008.

The Strategy. Local businesses will cooperate to develop channels of communication with authorities and service agencies, stay up to date with developments and provide input and information for precinct planning. Local businesses will cooperate to attract appropriate new businesses to meet the evolving community of residents, students and workers.

Develop a communication strategy that tells the good news stories.

The Council will establish or strengthen a Working Party with relevant Agencies (Health, Housing, Police, Employment, etc.) to consider appropriate ways to reduce negative effects on the public domain.

The Council will review planning instruments to ensure that service facilities are located in appropriate locations where they can serve their users without detracting significantly from economic activity.

Timeline. Channels of communication will be supported by the appointment of a Local Business Coordinator. The cross-agency Working Party should be established, or strengthened should such a form exist, in 2009.

The Outcome. Redfern will be known for its inclusive, multi-faceted community. It will be recognised as a pleasant and friendly place to visit, shop and do business.



7. Phasing and Partnerships

Strategy	Phasing	Partnerships
1. Vision		
Promote a shared vision for Redfern as edgy, funky, alternative, urban, gritty, interesting, artistic and the Gateway to Urban Indigenous Heritage and Culture.	2008 and regular review	Key. Local Business Coordinator, Council, RWCC Supporting. Local businesses, property owners, local residents
2. The Offer		
Commission a Targeted Tenancy Plan that identifies retail mix and location issues and suggests ways to move towards a more effective mix of shops and businesses in both the short term and the longer term.	2009	Key. Local Business Coordinator, Council, RWCC Supporting. Local businesses, property owners
3. Image & Branding		
Commission Good News Fact Sheets	2008 + ongoing	Key. Local Business Coordinator, RWCC Supporting. Local businesses, property owners, local residents, Council
Commission a Brand and Marketing Strategy	2009	
4. Physical Place		
Implement programs to remove shop shutters and aggressive security bars, and activate empty shops with displays.	2008-2009	Key. Local Business Coordinator, RWCC, Council Supporting. Local businesses, property owners, RWA, police and insurance industry.
Encourage property owners to upgrade/ redevelop buildings to maintain the traditional character of the area.	2009 + ongoing	Key. Local Business Coordinator, Council, RWA, RWCC Supporting. Local businesses, property owners, RWA, police and insurance industry.
Review parking arrangements and develop appropriate strategies.	2009	Key. Local Business Coordinator, RWCC, Council Supporting. Local businesses, property owners, RWA.



Strategy	Phasing	Partnerships
4. Physical Place		
Initiate discussions with a view to removing the one-way traffic arrangements on Regent Street and Gibbons Street.	2009	Key. RWCC, RWA, RTA Support. Council
Review Dept Planning planning instruments to ensure: <ul style="list-style-type: none"> they do not foster bland and generic architecture they encourage new retail spaces that are well-designed for commercial effectiveness. 	2009	Key. RWA, Council, Dept Planning
Liaise with RWA to support effective retail architecture on the Western side of Regent Street.	2009	Key. RWA, Council, RWCC
5. Local Business Coordinator		
Consider the appointment of a Local Business Coordinator	2009	Key. Council, RWCC Supporting. Local businesses, property owners
6. Events		
Develop a unified calendar of events. Identify one new signature event that could encapsulate the vision for Redfern.	2009 Inaugural signature event in 2010 Ongoing	Key. Local Business Coordinator, RWCC, RWA Supporting. Local businesses, property owners, Council, local residents, Uni Sydney, community groups
7. Social Character		
Better channels of communication between businesses, Council, agencies and local social organisations.	2008 - ongoing	Key. Local Business Coordinator, RWCC Supporting. Local businesses, Council, RWA, Dept Housing, Dept Health, NSW Police, Centrelink, community service providers
Establish or strengthen a Working Party with relevant Agencies (Health, Housing, Police, Employment, etc.) to consider appropriate ways to reduce negative effects on the public domain.	2009 - ongoing	Key. Local Business Coordinator, Council Supporting. Local businesses, Council, RWA, Dept Housing, Dept Health, NSW Police, Centrelink, community service providers
7. Social Character		



Strategy	Phasing	Partnerships
Review planning instruments to ensure that service facilities are located in appropriate locations where they can serve their users without detracting significantly from economic activity.	2009	Key. Council, RWA Supporting. Local Business Coordinator, Dept Planning, Dept Health, NSW Police, community service providers



Appendix 1

Document List

Bibliography of documents reviewed in the course of this study.

Redfern Waterloo Employment and Enterprise Plan (2006)	Redfern Waterloo Authority
Redfern-Waterloo Built Environment Plan (2006)	Redfern Waterloo Authority
Floor Space and Employment Survey (2006)	City of Sydney
2007 Local Action Plan, Inner South	City of Sydney
Corporate Plan 2008-2011	City of Sydney
City of Sydney Strategic Plan 2006-2009	City of Sydney
City of Sydney Social Plan 2006-2010	City of Sydney
Terrace Pattern Book (Draft 3 June 2008)	City of Sydney
Sustainable Sydney 2030 Strategic Plan	City of Sydney
Glebe Business Precinct Study (2008)	Hill PDA
Newtown Business Precinct Study (2008)	Hill PDA
NSW Government Metropolitan Strategy	NSW Government



Appendix 2

List of Implications

The Redfern Business Precinct is conveniently located in large catchment of potential users.

Train, bus and road systems provide good connectivity.

The railway line and the two one-way streets (Regent and Gibbons) separate the Redfern Business Precinct from businesses at ATP and North Eveleigh.

The Redfern Business Precinct serves a large local community of low income people.

The current environment of rapid change due to major redevelopment projects may create a unsettled trading environment with some uncertainties for local businesses.

The improvement of the Redfern Business Precinct should be seen as a long term project that will require clear vision and sustained resources over the coming years and decades.

The Redfern Business Precinct serves a large local community of low income people with considerable cultural and social diversity.

It is important that commercial services in the business area continue to meet the needs of low-income community members.

Managers and Professionals predominate amongst local residents who work, and this indicates an opportunity for local businesses.

It is important to balance the needs of socially disadvantaged community members with the needs of new residents so that the Business Precinct appeals to the broad spectrum of the local community and meets their needs in an efficient and effective manner.

Local businesses should work with Police and Council to implement strategies to counter safety/security issues, including actual and perceived issues.

The potential impact of locating an injecting room within the retail precinct should be examined carefully. Consideration should be given to the social benefits that will result from a thriving Business Precinct in Redfern and the social costs of failing to do this.

The Redfern Waterloo Authority has a major role to play in supporting the invigoration of the Redfern Business Precinct.

The Redfern town centre will be restricted to a very local catchment unless



businesses that can draw customers from beyond the immediate area are established in the Precinct. The new developments at ATP and Eveleigh will be irrelevant to the Redfern Business Precinct, unless new businesses in the town centre have a strong enough offer to attract users from these developing locations.

gillian

There is scope for increased employment in the retail, business services and hospitality sectors that are vital to a thriving commercial precinct.

The preponderance of employment in government and service agencies reflects the social disadvantage of the area and the magnitude of the task of revitalising commercial activities in the Business Precinct. This is a task that will require clear strategy supported by consistent effort that is resourced across several years.

This study recommends a multi-pronged strategy that starts with a clear vision for the quality and character of the Redfern Business Precinct. The first steps towards establishing this vision as a reality require: improved street appeal through upgraded business premises, a plan to attract appropriate tenants in a balanced retail mix, communication plan to broadcast positive messages, key events that attract the local community and others.

There is considerable scope for further improvement of the physical aspects of the town centre. In particular, run-down and shabby business premises need upgrading to present a clean, cheerful and inviting presence.

Security shutters, grills and bars should be renovated to present a minimal visual impact.

Continuous shop awnings would provide all-weather protection for people using the town centre.

There is an urgent need to activate empty shop fronts.

The business environment on Regent Street could be improved dramatically by converting Regent Street and Gibbons Street to two-way streets. This would allow Regent Street to reach its potential as a pleasant street for pedestrians to browse and linger.

It is vital that run-down business premises in the town centre are upgraded and well-maintained.

There is potential for many of the nineteenth century terrace houses to be upgraded and adapted for commercial use. A Terrace Pattern Book could help encourage this process.

Planning requirements that are designed to activate streets should be reviewed to ensure they are delivering commercial spaces with the fundamentals of market appeal in terms of size, location and connection to the street.

Planning requirements and the approval process should encourage new buildings



that add distinctive character to the area and avoid the proliferation of bland and generic architecture.

The most immediate need is to address the high proportion of vacant premises.

More commercial enterprises are needed to balance the high proportion of social services currently present.

More main street retailing businesses are needed to balance the high proportion of business services.

There are opportunities to support the emerging thematic zones identified in Fig 11 and thus reinforce positive synergies between compatible businesses.

This economic climate of reduced discretionary spending, may impact the development of leisure and lifestyle businesses in Redfern by reducing potential market demand. However, it may provide market opportunities for businesses that offer unique goods at low prices (e.g. second hand furniture).

If Redfern is to capture more of the expenditure that currently occurs in the Sydney CBD, it will need to consolidate a reputation for a unique retail offer that cannot be fulfilled by 'going to town'.

To compete with other local strips, Redfern will need to develop its own identity and retailing experience. It will compete with other local strips by being different from them in character and focus. It will complement them rather than competing like for like.

Economic renewal in Redfern will be encouraged by local and State governments through their planning strategies.

The City of Sydney recognises the importance and relevance of Indigenous heritage to the future of Redfern.

The depressed state of business activity in Redfern was confirmed in this consultation. Coming off a low base, the renewal process will take considerable resources applied consistently over a long period of time.

The consultation reflected the necessity to work on several fronts at the same time to improve the physical environment (shutters and empty shop fronts), the retail mix (more businesses), image (positive messages) and social conditions (anti-social behaviour on streets).

The RWCC has been activated, but it has limited resources, especially in the light of the problems faced.

The current business community is a stable one, they have operated in Redfern for a long time and one-third own their premises. Many are low-turnover businesses that see themselves as 'Useful and convenient' and 'Good value'.

Most businesses, especially retailers, identified their customers as local residents,



workers and students.

Businesses favoured a future direction that focused on more businesses that provide basic services for locals, and more cafes, bars and restaurants.

Businesses placed high priority on improving the sense of safety and security in Redfern, and attracting businesses to empty shopfronts.

To attract more customers, they emphasised the need for better access (parking and transport), greater security, more specialty shops, reduced social problems on the streets and better image for Redfern.

The survey confirms the strong localism of current business operations and the urgent need to attract more shopfront businesses to the main trading streets.

Most shoppers lived, worked or studied locally and were in the shopping precinct specifically to use one of the business. 'Convenience' was the main reason given for using shops and businesses in Redfern.

Most shoppers had walked to the Redfern retail precinct and most (80%) stayed less than an hour.

The high proportion (89%) of locals who walked to the business area shows the extent to which trade is confined to a very local catchment area. It is likely that to some extent current trade is limited to those who are unable to go elsewhere.

Both locals and non-locals had a mixture of positive and negative impressions associated with Redfern. The positive impressions can form a basis for positive stories about the business area. Locals had a particular appreciation for the multicultural character and diversity of the area.

Shoppers mentioned a number of limitations of the Redfern shopping area: the limited range of shops, need for Station upgrade and street cleaning, and concerns about personal safety, crime and beggars.

Three priority areas were identified for future action:

- Improve sense of safety + security
- Improve Redfern image
- Attract businesses to empty shopfronts

The predominant feature that would encourage shoppers to use Redfern more was a wider variety of shops.

For most categories of goods, the Sydney CBD was the predominant main shopping location, however Redfern was the main location for groceries and banking.

The survey confirms that Redfern currently serves a very local catchment and that shopping activity is very limited (very short visits). The priorities for renewal are: wider diversity of shops, improved safety and security, and an improved image that is matched by the shopping experience.



The concept of a 'Distinctive local shopping strip' will provide a direction for the Redfern town centre that will be readily understood by businesses, the local community and potential shoppers.

The four emergent zones provide the foundation for building strong retail offers that are clearly visible to potential users and benefit from centre of gravity synergies.

There may be scope to better align the current 'costs' (money costs and convenience costs) of parking in Redfern to the current poor retail mix by:

- modifying business and worker behaviour/expectations
- encourage Council review of some parking conditions
- commissioning a behavioural (rather than traffic) study tracking the way people use Redfern and move between parking, shops and services.

The Armidale Parking study highlights the importance of the integrity of the Four Zones identified at Redfern. The location of banks and supermarket will influence the viability of secondary businesses.

The Wahroonga parking study suggests that if a section of Redfern Street is to be identified as a cafe/restaurant zone then provision should be made for adequate parking that suits this use.

While Redfern does not currently have the strong product offer that was already established in Cabramatta in 1998, nevertheless, the approach of actively promulgating good news stories is relevant to Redfern. To be most effective in supporting business development, the stories should relate to products and services available in Redfern, and to events/activities that give people a reason to visit Redfern.

The Redfern Waterloo Chamber of Commerce is active and focused. It needs support and encouragement to develop its activities so it can make an important impact on local trading conditions.

A Local Business Coordinator position would add an important resource in terms of expertise, time and energy, along with consistency of effort over an extended time.

Redfern will be known as an edgy, funky, alternative, urban, gritty, interesting, artistic and creative shopping strip with a specialty focus on Indigenous art, culture and enterprise.



Appendix 3

Survey Forms



The City of Sydney has commissioned Environmetrics to conduct a survey of businesses and retailers as part of a coordinated approach to the future of the Redfern Business Precinct.

The survey is aimed at local business operators around the Redfern Business Precinct and will help to establish greater links between local businesses and retailers, local business associations and chambers of commerce, and the City of Sydney.

The survey is entirely voluntary. The information you provide will be kept strictly confidential as per the City of Sydney privacy policy.

1. Your role (*Circle ONE only*)

- Business owner. 1
Business manager 2
Staff member. 3

2. What is the main industry of the Business?

(e.g. Retail – Women's Clothing)?

.....

3. How many years has this business been in Redfern?

.....

4. How many years have you owned, or worked in the business?

.....

5. Does this business lease the premises or own them?

- Lease 1
Own. 2

6. What are your Trading Hours?

- Weekday
Thursday
Saturday
Sunday

7. What is the busiest day of the week for this business?

- Sunday 1 Thursday 5
Monday 2 Friday 6
Tuesday 3 Saturday 7
Wednesday 4 No particular day 8

8. What are the two busiest times of day for this business?
(circle up to TWO times for each day)

	Before 8.00am	8:00am to 11.00am	11:00am to 1.00pm	1pm to 5.00pm	After 5.00pm	Closed
Sun	1	2	3	4	5	6
Mon	1	2	3	4	5	6
Tues	1	2	3	4	5	6
Wed	1	2	3	4	5	6
Thur	1	2	3	4	5	6
Fri	1	2	3	4	5	6
Sat	1	2	3	4	5	6

9. Why are those times busy for your business?

.....
.....
.....

10. Who are your main customers? (*Can circle more than one*)

- Local residents. 1
Local workers/students 2
Other Sydneysiders 3
Tourists 4
Other businesses. 5
Other 6
Don't know/Can't say 7

11. If 'Other Sydneysiders'. What areas of Sydney do they come from? (*Can circle more than one*)

- Inner West, City and City South. 1
Eastern Suburbs 2
North Shore 3
Western areas of Sydney 4
Other (specify)

12. Are you undertaking any current marketing activities?

- Yes 1
No 2

13. If 'yes'. What marketing activities are you doing?

.....
.....
.....

14. How is your business seen by the community? *(Please circle as many as apply, based on your general impressions.)*

Useful and convenient 1
 A landmark Redfern business 2
 Good value for money 3
 Tired and rundown 4
 Friendly and community-spirited 5
 Modern and energetic 6
 Other (specify)

15. Thinking of the Redfern Street upgrade, would you say it makes Redfern ...

Much better than before 1
 A little better than before 2
 About the same as before 3
 A little worse than before 4
 A lot worse than before 5

16. Do you have any specific comments about the street upgrade?

.

17. In future years, the Redfern business precinct may develop a fresh focus. Which of the following directions do you think would be good for Redfern? *(Can circle more than one)*

Factory outlet shops 1
 Cafes, bars and restaurants 2
 Specialty homewares and gifts 3
 Home renovation and decor shops 4
 Cinema and entertainment area 5
 Basic services for locals 6
 Specialty foods – makers, markets, shops 7
 Other (specify)

18. What is your vision for the future of the Redfern business precinct?

.

19. Thinking now about some activities that could help the Redfern business precinct, what priority do you put on the following actions?.

	Top priority	Middle priority	Low priority	Don't know
Better customer service in businesses	1	2	3	4
Attract businesses to empty shopfronts	1	2	3	4
Upgrade business premises	1	2	3	4
Improve Redfern image	1	2	3	4
Improve sense of safety and security	1	2	3	4

20. What suggestions do you have for attracting more users to the Redfern shopping and business precinct?

.

21. What additional types of business would you like to see in Redfern?

.

22. Are you a member of of the Redfern Waterloo Chamber of Commerce?

- Yes 1
No 2

The following information will help classify businesses in this survey. The information for individual businesses will not be reported and it will be used to compare with future growth trends.

23. What is the approximate annual sales/gross revenue (turnover) of your business or organisation?

- Less than \$100,000 1
Between \$100,000 and \$250,000 2
Between \$250,000 and \$500,000 3
Between \$500,000 and \$1 million 4
Between \$1 million and \$5 million 5
More than \$5 million 6
Don't Know 7
Would rather not say 8

24. How many people work in your business?

- Full time
Part time
Casual

REMINDER: The information you provide will be kept strictly confidential as per the City of Sydney privacy policy.

As part of this study, we plan to conduct Business Forum meetings for local businesses.

Are you able to participate in a Business Precinct Forum in your area?

- Yes 1
No 2

Would you like to receive updates on this Business Development Project?

- Yes 1
No 2

Please provide your contact details so we can keep you informed.

Name

Phone

Email

THANK YOU FOR YOUR HELP. IT WILL HELP THE CITY OF SYDNEY TO PLAN IMPROVEMENTS TO THE REDFERN BUSINESS AREA.

If you have any questions about this study, please feel free to contact me.

Gillian Savage, Environmetrics.

Phone: 9954 0455

Email: gillian@environmetrics.com.au

PLEASE RETURN THIS SURVEY BY FRIDAY 28 MARCH 2008.

Mail: use the reply paid envelope

Fax: 9954 9046

Email: Scan your completed form and email it to – gillian@environmetrics.com.au

Hello, today we are doing a short survey of Redfern shoppers, can I ask you a few questions?

(If they ask how long it will take, you can say the interview will take 5-6 minutes.)

1. Are you passing through the shopping area on your way somewhere else, or did you come specifically to visit a shop or use a service? CIRCLE ONE ONLY.

On the way somewhere 1
Came specifically 2

2. Do you ... READ OUT

	Yes	No
Live in the local area	1	2
Work in the local area	1	2
Study nearby	1	2
Have friends or family who live locally	1	2

3. What was the MAIN form of transport you used to travel to the Redfern shops today? CIRCLE ONE ONLY

Train/light rail. 1
Bus 2
Car 3
Taxi 4
Bicycle. 5
Walking 6
Motorcycle. 7

4. How often do you visit shops/businesses in Redfern?

Every day 1
Several times a week 2
About once a week 3
About once a fortnight. 4
About once a month 5
A few times a year. 6
Once every few years 7
First time 8

5. What is your **main reason** for visiting shops/businesses here today? Is it for ... READ OUT. CIRCLE ONE ONLY

Convenience 1
Range of products. 2
Value for money/price 3
Uniqueness of products 4
High level of expertise. 5
Good staff 6
Other (specify). 7

6. Which shops and services will you use in Redfern today?

Cafe/pub/bar/food outlet 1
Bank/Credit union/ATM 2
Medical service/chemist. 3
Centrelink/employment office 4
Hardware store 5
Grocery/convenience store 6
Clothing/shoe store 7
Hairdresser/barber/beauty 8
Newsagent/gift/homewares 9
Other (specify)

7. How long do you expect to spend in the Redfern shopping area today?

30 minutes or less 1
30-60 minutes 2
1-2 hours 3
More than 2 hours 4

8. What are the main things that come to mind when you think about Redfern? PROBE FOR DETAILS

.....
.....
.....
.....

9. Thinking of the shopping area – What are the main **things that you like** about the **Redfern shopping area**? PROBE FOR CHARACTERISTICS

.....
.....
.....
.....
.....

10. What are the main **things that you DON'T like** about the Redfern shopping area? PROBE FOR CHARACTERISTICS

.....
.....
.....
.....
.....

11. What are some specific **places in the Redfern shopping area that you like**. PROBE FOR SPECIFIC PLACES

.....

.....

.....

12. And what are some specific **places in the Redfern shopping area that you DON'T like**? PROBE FOR SPECIFIC PLACES

.....

.....

.....

13. Thinking now about some of the ways the Redfern shopping area could be improved, what priority do you put on the following actions? READ OUT. ROTATE ORDER..

	Top priority	Middle priority	Low priority	Don't know
Better customer service in businesses	1	2	3	4
Attract businesses to empty shopfronts	1	2	3	4
Upgrade business premises	1	2	3	4
Improve Redfern image	1	2	3	4
Improve sense of safety and security	1	2	3	4

14. In future years, the Redfern shopping area may develop a fresh focus. Which of the following directions do you think would be good for Redfern?

Factory outlet shops 1

Cafes, bars and restaurants 2

Specialty homewares and gifts 3

Home renovation and decor shops 4

Cinema and entertainment area 5

Basic services for locals 6

Specialty foods – makers, markets, shops 7

Other (specify)

15. What would encourage you to use the Redfern shopping area more often, or at different times?

.....

.....

.....

16. Are there any specific shops or services you would like to see (more of) in this area?

.....

.....

.....

17. Where do you usually go for the following goods and services? (Suburb or centre)

Groceries 1

Clothes 2

Personal items 3

Personal services 4

Technology 5

Household items 6

Banking 7

18. What suburb do you live in?

.....

19. Do you think the Redfern shopping precinct is adequately served by public transport?

Yes 1

No 2

And finally —

20. What year were you born?

21. Could I have your name and contact phone number in case my supervisor needs to check any details of this interview? Your contact details would only be used by my supervisor and will be destroyed at the end of the project.

Name

Phone

THANK YOU FOR YOUR HELP. IT WILL HELP THE CITY OF SYDNEY TO PLAN IMPROVEMENTS TO THE REDFERN BUSINESS AREA.

22. Record gender

Male 1

Female 2

23. Record date [dd/mm/yyyy] ____ / ____ / 2008

24. Record location

25. Record time
- 7.00-11.00am 1
- 11.00-3.00pm 2
- 3.00-7.00pm 3

26. Weather Hot/Moderate/Cool Wet/IDry

Interviewer name (please print)

.....