

Item 6.

Public Exhibition - Haymarket and Chinatown Revitalisation Strategy

File No: X098596

Summary

Haymarket and the CBD South village area is one of Sydney's most iconic precincts and has long been recognised as a focal point for Asian food, culture, and community both locally and internationally. It offers a vibrant and unique urban experience.

The precinct is home to significant landmarks including Dixon Street marked by the Chinatown Ceremonial Gates, Paddy's Market/Market City, the Chinese Garden of Friendship and Belmore Park. It is a well-known destination for entertainment and nightlife and is home to the famous Lunar New Year festival and the Friday night markets.

The area is of great significance to Chinese Australian communities. Chinese people began arriving in Australia as early as 1818 and by the 1930s Haymarket became the social, cultural, and economic centre for Chinese people in Sydney. From the 1970s the Chinese population has expanded and diversified, and immigration patterns have shifted, bringing more students and highly educated workers from different regions within China and from other Asian countries.

Haymarket is now a diverse Asian precinct, with a distinct Asian Australian identity. This diversity can be seen on the streets through the variety of businesses and activities, as well as the emergence of Thai Town centred around Campbell Street. This diversity is rare in other cities with a well-known and established Chinatown.

In response to concerns about the impact of Covid-19 on economic activity and competition from Darling Square, the City undertook:

- Haymarket visioning engagement to understand what the community feels is important and could be improved about the area;
- Haymarket and Chinatown Economic and Land Use Study to provide an economic 'health check' of the area; and
- Chinatown Thematic History to provide a foundational understanding of the key themes from Chinatown's history to inform future heritage work.

Overwhelmingly, the community would like to see Haymarket become a vibrant and bustling place that celebrates diverse Asian cultures and a place that preserves its history and character while embracing contemporary forms of cultural expression.

The draft Haymarket and Chinatown Revitalisation Strategy provides a coordinated response to the community vision and evidence-based studies. It identifies actions in five areas:

1. Renewal of the heart;
2. Planning and heritage;
3. Public domain and public art;
4. Culture, events, and activations; and
5. Collaboration and partnerships.

In addition to community feedback, the strategy is consistent with a number of resolutions of Council including 3.2 Supporting Haymarket and Other Businesses (9 March 2020) and 10.4 Project Definition and Scope – Dixon Street Improvements (21 November 2022); A planning proposal to heritage list the Chinatown Ceremonial Gates and the draft Haymarket Public Domain Plan are part of the draft Revitalisation Strategy for Haymarket and are the subject of separate reports.

The actions identified in the draft Strategy are intended to illustrate opportunities for revitalising the precinct to facilitate consultation with community stakeholders, landowners, businesses, cultural institutions, and NSW Government agencies about the future direction of the area. Following community consultation, fully developed actions and projects will be developed for Council consideration.

This report seeks Council's approval to publicly exhibit the draft Haymarket and Chinatown Revitalisation Strategy. It is recommended the draft Strategy be placed on public exhibition for a minimum period of four weeks to seek comment on proposed actions and priorities (in parallel with the draft Haymarket Public Domain Plan). After exhibition, the draft Strategy will then be updated to respond to feedback and formally presented to Council for adoption as the Haymarket and Chinatown Revitalisation Strategy.

Recommendation

It is resolved that:

- (A) Council note the 9 March 2020 Resolution of Council - Supporting Haymarket and Other Businesses put forward via a Lord Mayoral Minute requesting that the Chief Executive Officer further investigate street attractions and activations, including changes to signage, streetscape and traffic movements in Haymarket to reinvigorate the area and increase foot traffic and the 21 November 2022 Resolution of Council endorsing the Project Definition and Scope for the Dixon Street Improvements;
- (B) Council note the findings of the Haymarket Visioning Engagement Outcomes Report as shown at Attachment B to the subject report, Community Vision for Haymarket as shown at Attachment C to the subject report, Haymarket and Chinatown Economic and Land Use Study as shown at Attachment D to the subject report, and Chinatown Thematic History as shown at Attachment E to the subject report;
- (C) Council approve the public exhibition of the draft Haymarket and Chinatown Revitalisation Strategy as shown at Attachment A to the subject report, for a minimum period of 28 days;
- (D) Council note that the Haymarket and Chinatown Revitalisation Strategy including any recommended changes will be brought back to Council for adoption following the exhibition period;
- (E) Council note that further reports will be brought back to Council following heritage assessment of any further items for heritage listing;
- (F) Council note that following the exhibition period if it is confirmed that the Dixon Street frontage upgrade program and the Haymarket activation grants are endorsed by Council, additional budget of an estimated \$900,000 over three years to co-fund the Dixon Street frontage upgrade program and an estimated \$600,000 over three years for additional Haymarket activation grants will be required. In this eventuality a further report will be brought back to Council for consideration and public exhibition of the new programs as required;
- (G) Council note following the exhibition period, if it is confirmed that significant implementation activities are endorsed by Council, funding will be required for an additional Full Time Equivalent (FTE) position for a Haymarket Coordinator and this will be required to be incorporated into future budgets for public exhibition and endorsement by Council; and
- (H) authority be delegated to the Chief Executive Officer to make minor amendments to the draft Haymarket and Chinatown Revitalisation Strategy for clarity or correction of drafting errors prior to public exhibition.

Attachments

- Attachment A.** Draft Haymarket and Chinatown Revitalisation Strategy
- Attachment B.** Haymarket Vision Engagement Outcomes Report
- Attachment C.** A Community Vision for Haymarket: What we heard from you
- Attachment D.** Haymarket and Chinatown Economic and Land Use Study
- Attachment E.** Chinatown Thematic History
- Attachment F.** Council Resolutions - Supporting Haymarket and Other Businesses (9 March 2020) and Project Definition and Scope – Dixon Street Improvements (21 November 2022);

Background

1. Haymarket, incorporating Chinatown, is one of Sydney's most iconic neighbourhoods and has long been recognised as a focal point for Asian food, culture, and community both locally and internationally.
2. Haymarket offers a vibrant and unique urban experience, being both part of Central Sydney and being one of the City's densest residential neighbourhoods.
3. The precinct is home to significant landmarks including Dixon Street marked by the Chinatown ceremonial gates, Paddy's Market/Market City, the Chinese Garden of Friendship and Belmore Park.
4. Haymarket is a well-known destination for entertainment and nightlife and is home to the famous Lunar New Year festival and the Friday night markets.
5. The area is of great significance to Chinese Australian communities. Chinese people began arriving in Australia as early as 1818 and by the 1930s Haymarket became the social, cultural, and economic centre for Chinese people in Sydney.
6. Over time, the population has diversified. Second and third generation Chinese Australians have developed their own identities and cultures. Immigration patterns have shifted bringing more students and highly educated workers from different regions within China (notably more Mandarin speakers) and from other Asian countries.
7. The 2021 census shows that Haymarket's residents were born in China (21.4 per cent), Thailand (17.5 per cent), Australia (13 per cent), Indonesia (11.2 per cent), Malaysia (3 per cent) and South Korea (2.8 per cent). This co-location of different Asian diasporas is relatively rare in other cities with a well-known Chinatown.
8. Haymarket is now a diverse Asian precinct, with a distinct Asian Australian identity. This diversity can be seen on the streets through the variety of businesses and activities, as well as the emergence of Thai Town centred around Campbell Street.
9. Haymarket is characterised by the predominance of Asian shops, restaurants and businesses, the vibrant signage, as well as the high levels of activity, narrow frontages and the diversity of heritage and building forms.
10. In March 2020, a Lord Mayoral Minute noted the Covid-19 pandemic was having a disproportionate impact on the Chinatown precinct, and that businesses and restaurants in Haymarket were seeing a significant downturn in trade of up to 80 per cent.
11. Senior business leaders called on the City of Sydney to develop a plan to support the local business community, drive footfall to the Haymarket area and to assist in reducing the spread of misinformation about Covid-19 in the community. The City was asked to investigate:
 - (a) opportunities to assist businesses across the city, such as waiving fees and charges;
 - (b) street attractions and activations, including changes to signage, streetscape and traffic movements in Haymarket to reinvigorate the area and increase foot traffic; and

- (c) a heritage study for Chinatown which would include assessing the Dixon Street gateways for listing, which are of cultural significance to the Chinese community.
12. In response, the City has undertaken:
- (a) Haymarket visioning engagement to understand what the local community feel is important and could be improved about the area, which is at Attachments B and C;
 - (b) Haymarket and Chinatown Economic and Land Use Study to provide an economic 'health check', which is at Attachment D;
 - (c) Chinatown Thematic History to provide a foundational understanding of the key themes from Chinatown's history to inform future heritage work, which is at Attachment E; and
 - (d) a heritage assessment of the Chinatown Ceremonial Gates, which is the subject of a separate report; and
 - (e) preparation of the draft Haymarket Public Domain Plan, which is subject of a separate report.
13. The scope and findings from these three streams of work are summarised below.
14. The engagement and evidence-base studies have informed the City's draft Haymarket and Chinatown Revitalisation Strategy at Attachment A to this report.
15. In addition to community feedback, the strategy is consistent with a number of resolutions of Council including 3.2 Supporting Haymarket and Other Businesses (9 March 2020) and 10.4 Project Definition and Scope – Dixon Street Improvements (21 November 2022); A planning proposal to heritage list the Chinatown Ceremonial Gates and the draft Haymarket Public Domain Plan are part of the draft Revitalisation Strategy for Haymarket and are the subject of separate reports.

Draft Haymarket and Chinatown Revitalisation Strategy

16. The draft Haymarket and Chinatown Revitalisation Strategy (draft Strategy) provides a coordinated response to the community vision and identifies actions in five key areas:
- (a) Renewal of the heart: Dixon Street is of great significance to the community as the historic heart of Chinatown, but it needs improvement. The City has committed funding to upgrade the public domain with design work already underway. Improvement is also needed to the presentation and the offer of the buildings and shops. A co-funding program could kick-start this renewal by incentivising landowners in Dixon Street to upgrade their buildings over a three year period. Potential actions include:
 - (i) main street improvement program for Dixon Street south to incentivise facade, awning and food and beverage shopfront improvements via a streamlined DA process. Improvements to be eligible for a co-funding program for a limited period of time (three years)
 - (ii) food and beverage shopfront improvements could bring food preparation to the shop front window as form of theatre and street interest

- (iii) introduce a design guide and planning concierge service for the owners of private buildings: in relation to facade, awning and shopfront upgrades for Dixon Street
- (b) Planning and heritage: Haymarket is different in character to the rest of Central Sydney, with a historic fine grain land ownership pattern reflected in the narrow frontages and high density of small businesses. Signage, lighting, and art is more vibrant, particularly at night, with a distinct Asian character. The planning rules could be adapted to embrace these points of difference and to recognise and conserve buildings of significance to the Chinese community. Potential actions include:
 - (i) allowing more freedom of cultural expression in signage controls and creative building lighting to enhance the night time economy
 - (ii) encourage retention of the fine grain by lifting the street wall heights in the special character area (other than in Dixon Street itself) in order to make upgrades and renewal more feasible without consolidation
 - (iii) strengthen heritage narratives: update locality statements, statements of significance, and identify new items for listing to recognise Chinese history
- (c) Public domain and public art: Recent public domain upgrades have been made to the southern section of George Street, Hay Street and Ultimo Road, and designs are being prepared to improve Dixon Street. The community told us they want to see more creative lighting, pedestrian-friendly streets, outdoor dining, public amenities like seating and public toilets, and better cleaning and maintenance. The draft Haymarket Public Domain Plan (subject of a separate report) explores future opportunities to improve Haymarket's streets and public spaces and directions for public art.
- (d) Culture, events, and activations: A changing calendar of events, festivals and culture brings added life to the precinct. They are an opportunity to celebrate Asian cultures, while inviting visitors to explore. To catalyse the revitalisation of the area, the City could support additional festivals, events and cultural programs which celebrate Asian cultures as a point of difference. Potential actions include:
 - (i) support additional festivals and events or more regular activities which celebrate Asian cultures and activate the precinct
 - (ii) identify opportunities for additional historic interpretation, for example, walking tours, hoardings and plaques
 - (iii) explore opportunities to secure long-term legacy and place benefits of SXSW Sydney
- (e) Collaboration and partnerships: Through engagement, we heard that community representatives act as cultural custodians, with a great of sense of responsibility for the future of Haymarket. They expressed a desire to work together with the City. We met many local champions who are already contributing to the revitalisation of the area but need coordination. Potential actions include:
 - (i) fund a new Haymarket coordinator to channel the various actions for community members, businesses and landowners who want to be involved

- (ii) provide a planning and heritage 'concierge service' for Dixon Street building owners (for a limited period) to navigate the planning system
- (iii) set up an informal Haymarket Forum of existing societies, chambers, groups and champions to share information and to coordinate projects for the revitalisation of Haymarket

Haymarket visioning engagement

17. Engagement was carried out between August and October 2022 to understand what makes Haymarket and Chinatown special, the places that people love and what could be improved. More than 1,150 people shared their ideas for the future of Haymarket, with around 110 people attending the Lord Mayor's forum in August 2022. Over 950 community surveys were completed in English, traditional and simplified Chinese, Thai, Korean and Indonesian.
18. When we asked the community what they would like Haymarket to be in the future, respondents described:
 - (a) a vibrant, bustling place
 - (b) a place that celebrates diverse Asian cultures
 - (c) a place that preserves its history and character while embracing contemporary forms of cultural expression
19. Respondents identified the following priorities for improvement:
 - (a) more lighting to create a safe and colourful atmosphere
 - (b) greater range of quality, authentic and affordable food and retail options
 - (c) more outdoor dining options and public amenities like seating and public toilets
 - (d) improved access to and connections within Haymarket
 - (e) increased attractiveness of the area through street cleaning and maintenance
 - (f) contemporary cultural expression
 - (g) preservation of local character and cultural heritage
 - (h) using the streetscape to bring colour and to celebrate diverse Asian cultures
 - (i) extended trading hours and thriving nightlife
20. Respondents identified the places that should be improved, including:
 - (a) Chinatown and Dixon Street
 - (b) Paddy's Market
 - (c) the southern end of George Street
 - (d) Sussex Street

- (e) Belmore Park
21. Community representatives spoke as cultural custodians. They expressed a great sense of responsibility for the future of Haymarket and a desire to work together with the City of Sydney.

Haymarket and Chinatown Economic and Land Use Study

22. The Haymarket and Chinatown Economic Study was commissioned by City Planning to provide a deep dive into the trends and changes affecting the area. Atlas Economics were appointed in August 2022 carry out the economic research that was completed in March 2023. The Study Area comprised that broadly bounded by Elizabeth Street in the east, Belmore Park/Central Station to the south, Quay Street/ Darling Drive to the west and Bathurst Street to the north.
23. The research of the Study Area noted that:
- (a) Haymarket benefits from its strong cultural identity and distinct character, established food and beverage offer, urban feel and fine grain character, and the attractiveness of the historic buildings.
 - (b) Haymarket has one of the highest population densities in Sydney. The Study Area's 16,300 residents are predominantly young and middle-aged adults, with 83 per cent being born overseas (73 per cent born in Asia). Most residents live in unmarried single or couple households with no children, and almost 75 per cent are renting.
 - (c) Approximately 39,000 workers are located across the Study Area representing a significantly lower worker density than the rest of Central Sydney.
 - (d) The Study Area recorded a decline in employment over 2016-2021, falling by some 1,500 jobs (decline of ~4 per cent) compared to positive growth (5 per cent) in the same period in broader Central Sydney.
 - (e) Small and microbusinesses and non-employing businesses dominate, with the Study Area contributing some \$6.5 billion in economic value in 2020-21
 - (f) In 2017, the dominant uses of floor space (excluding residential) were tourist, cultural and leisure; government; professional and business services; and transport and logistics.
 - (g) An estimated 67,600 students, both tertiary and vocational students, were located in Haymarket pre-pandemic, with a large proportion being international students that returned home during the pandemic.
 - (h) 500,000 domestic overnight visitors were recorded in the year to March 2022, 50 per cent fewer than 2019 levels, with international visitors only now just beginning to return.
24. The Study noted the following around activity levels:
- (a) Recovering from the Covid-19 pandemic, activity across the Study Area rose by approximately 30 per cent in 2021–22.

- (b) Mobility data shows that in 2022 activity levels remained low, with weekday and weekend activity in 2022 down 40 per cent and 29 per cent respectively on 2019 activity levels.
 - (c) A comparison of activity levels over 2019-2022 in the Study Area against those in the broader Central Sydney area demonstrates the disproportionate impact of the Covid-19 pandemic on Haymarket.
 - (i) In the Study Area weekday and weekend activity levels fell by 40 per cent and 29 per cent respectively over 2019-2022. By comparison, weekday and weekend activity in Central Sydney declined by 33 per cent and 18 per cent over the same period.
 - (ii) Activity levels appear particularly lower around the core Chinatown area on both the weekday and weekend compared to other parts of the Study Area
 - (iii) Activity appears to be focused around Central Station, major hotels, World Square shopping centre, Darling Square and George Street.
 - (iv) The Study Area also has a much lower level of day-time activity compared to the broader Sydney CBD, with a clear spike in activity over the 6pm-8pm period.
 - (v) Weekend activity levels across the Study Area are notably higher than weekday.
 - (vi) The Precinct Activation Grant-funded event 'Neon Playground' produced a marked increase in activity levels across Haymarket during the October-November 2022 period.
25. To investigate concerns about vacant shop fronts in the Study Area, a ground floor land use audit was also carried out. It found:
- (a) Retail uses are the most common ground floor uses accounting for 65 per cent with food catering the most prolific category with 450 businesses/tenants. Food catering is most prolific in the core Chinatown area comprising 23 per cent of tenancies.
 - (b) Haymarket had a very high vacancy rate of 18.3 per cent. 252 vacant units were identified, including 88 in Dixon House and Unison House which have been vacated for redevelopment.
 - (c) The vacancy rate is higher than the rest of Central Sydney (6.9 per cent), and higher than Haymarket's pre-pandemic levels of 9.8 per cent. A healthy vacancy rate would be around 3 – 5 per cent which reflects normal occupier fluctuations.
 - (d) Vacancy rates are most pronounced in the sub-precincts around Dixon Street (26 per cent) and Thomas Street/market area (21 per cent).
 - (e) Darling Square has the lowest vacancy rate within Haymarket (2.6 per cent) followed by the sub-precinct in northern Haymarket around Kent and Sussex Streets (6.4 per cent).

- (f) Retail demand projections suggest that the amount of retail space in the Study Area is appropriate to meet the needs of its trade catchment. It is the quality of the retail offering that is the issue.
 - (g) Trends analysis and stakeholder engagement indicates that the place and amenity expectations of the Study Area's customer audiences are increasing. Authentic, immersive experiences in attractive settings have become the 'baseline' expectations in a post Covid-19 environment.
26. The Study also identified a number of challenges, which included:
- (a) The Study Area's trade catchment has not yet returned to pre-pandemic levels
 - (b) The existing retail is not meeting the needs of key visitor categories
 - (c) There are limited visitor generators or anchors
 - (d) There are high vacancy levels
 - (e) Parts of the Study Area are not heritage but look tired and dated
 - (f) Some tenancies are too large, making them difficult to lease with prohibitively expensive fit-out costs for small businesses
 - (g) There is a lack of and resistance to consolidated ownership
 - (h) Some landowners are unwilling to 'meet the market' in term of rent levels
 - (i) Recent high public transport accessibility connects the precinct to a wide visitor and customer base, however, feedback suggests that access for vehicles has become difficult, less legible and more inaccessible
 - (j) Disruption to businesses from recent construction works
 - (k) Activity is low for much of the day, with a strong peak between 6pm-8pm
27. Off the back of those challenges there were a number of opportunities identified including:
- (a) Embracing strong social and cultural history, community connections, character and identity to develop more reasons to visit
 - (b) The Haymarket Visioning engagement has reignited relationships and drawn out local 'champions'
 - (c) Build on the strong momentum from precinct activation grants
 - (d) Capitalise on the investment into Museum of Chinese Australia
 - (e) A successful city events and public art programme which can be further developed
 - (f) Potential for a revitalised offer at Paddy's Market to attract more people
 - (g) An active public domain upgrade programme with potential to improve the appearance of the precinct, meeting customer expectations

- (h) Some consolidated blocks in prominent locations, enabling revitalisation through redevelopment
- (i) Embrace and enhance the fine grain character through incremental forms of development
- (j) Urban appeal of the area making it suitable to leverage ongoing investment and transition to a more innovation-focused economy as part of Tech Central
- (k) Entertain and service increased worker population through future development within the Tower Cluster areas located in the north and south of the Study Area.

Chinatown Historic Thematic Study

- 28. City Planning commissioned GML Heritage to undertake a Thematic History of Chinatown. A copy of the Study is provided at Attachment D.
- 29. The Study is not an extensive history of the area but draws on other sources to provide a foundational understanding of the significance of Chinatown and the overarching historical themes. The Thematic History will guide future heritage work in the area.
- 30. As part of the preparation of this Thematic History, the City wanted to ensure that the themes responded to the place and its people. As such, community members were asked to participate in workshops to give their feedback on the draft Thematic History. Two sessions were held, and 13 submissions were made.
- 31. The Thematic History Study was updated in response to the feedback from consultation. The report identified the following key themes:
 - (a) Theme 1: Evolving Chinatown: Chinatown as a destination, a place name and a unified urban area of Sydney evolved much later in the twentieth century. Concentrations of Chinese residences and businesses tell the story of evolving patterns of migration and a diversifying economy.
 - (b) Theme 2: Living and working in Chinatown: The theme of living and working in Chinatown spans a vast range of historical experience. Formerly high-density neighbourhoods have vanished, but new homes and businesses have taken their place. Discrimination against Chinese communities directly impacted on the function of business and their homes. However, the strength and diversity of Chinese people and businesses ensured a thriving network with international reach.
 - (c) Theme 3: Belief, culture and community: Chinatown evolved over time from a place offering shelter and sanctuary to a hub of social, cultural, religious and political activity for Sydney's Chinese community and an international gateway for business.
 - (d) Theme 4: Change and renewal in Chinatown: Like many Chinatowns globally, Sydney's Chinatown has been shaped by a range of factors. Development pressures, population decentralisation and shifting demographics have changed the fabric and boundaries of its communities. Consequently, the role of Chinatown has also evolved as it straddles its history and the new demands of our increasingly globalised world.

Other activities by the City

32. Many actions are already underway or on-going in Haymarket, including:
- (a) The City has committed \$5 million for public domain improvements to Dixon Street. Designs are currently being prepared. Early concept designs will be consulted on alongside the draft Revitalisation Strategy and draft Public Domain Plan.
 - (b) A heritage assessment has been produced for the Chinatown Ceremonial Gates (subject to a separate report) and restoration works will take place alongside the Dixon Street public domain works.
 - (c) Public domain improvement works are at or nearing completion for southern end of George Street, Barlow Street Forest, Hay Street and Ultimo Road.
 - (d) The City has provided an accommodation grant for the creation of the new Museum of Chinese in Australia (MOCA) in the former Haymarket Library building on George Street. MOCA is due to open in 2023/24.
 - (e) Fees are waived for outdoor dining until 2025.
 - (f) The City produces the annual Sydney Lunar New Year and Lunar Lanes events.
 - (g) The City supports the Friday night markets which are currently in Dixon Street.
 - (h) Two Sydney Streets events are organised in Haymarket each year.
 - (i) SXSW Sydney, a week-long event exploring tech, innovation, games, music, screen and culture, will be based in Darling Harbour and Haymarket in October 2023 and is planned to be an annual event for the next five years.

Key Implications**Strategic Alignment - Sustainable Sydney 2030-2050 Continuing the Vision**

33. Sustainable Sydney 2030-2050 Continuing the Vision renews the communities' vision for the sustainable development of the city to 2050. It includes 10 strategic directions to guide the future of the city, as well as 10 targets against which to measure progress. This report is aligned with the following strategic directions and objectives:
- (a) Direction 1 - Responsible governance and stewardship – The draft Strategy draws on evidence to inform decision making. It also directs us towards participatory forms of governance, engaging and partnering with the local community to revitalise Haymarket.
 - (b) Direction 2 - A leading environmental performer – The draft Strategy encourages improved performance of buildings through incentivising renewal, increases to tree canopy through public domain improvements and supports a culture of walking, cycling and public transport.
 - (c) Direction 3 - Public places for all – The draft Strategy together with the draft Public Domain Plan will balance all public space uses and identify opportunities to reallocate road space in response to an increased demand for more space for pedestrian movement and street life.

- (d) Direction 4 - Design excellence and sustainable development – The draft Strategy responds to the distinctive character, history, heritage, and iconic places valued by communities in Haymarket.
- (e) Direction 5 - A city for walking, cycling and public transport - The draft Strategy together with the draft Public Domain Plan will improve pedestrian amenity by creating an attractive, comfortable, and safe environment with improved connections to a busy public transport interchange.
- (f) Direction 6 - An equitable and inclusive city – The draft Strategy has been informed by extensive community engagement. The Strategy looks to make Haymarket accessible to all by improving public spaces, events and culture and collaboration with the communities.
- (g) Direction 7 - Resilient and diverse communities – The draft Strategy responds to the diverse communities of Haymarket and identifies opportunities for Haymarket's economy to be diversified, strengthening its resilience.
- (h) Direction 8 - A thriving cultural and creative life – The draft Strategy responds to community feedback and identifies new opportunities for cultural events and activities in Haymarket.
- (i) Direction 9 - A transformed and innovative economy – The draft Strategy is rooted in a strong understanding of the precinct's economic challenges and advantages and identifies actions to support thriving economic activity.

Social / Cultural / Community

- 34. The Strategy recognises that the area has high social and cultural significance, particularly to Asian communities. Community representatives expressed a great sense of responsibility for the future of Haymarket and a desire to work together with the City of Sydney. Engaging and partnering with the community will be critical to achieving the desired social and cultural outcomes.

Environmental

- 35. The Strategy is aligned with the City's environmental actions and strategies. The next stages of work will consider any impacts on environmental outcomes related to potential actions, for example related to changes to planning controls or guidance.

Economic

- 36. The Strategy is underpinned by economic evidence and identifies potential actions to support local businesses, attract investment and to support the vitality of the area through improvements to place quality. The Strategy is in alignment with the City's Economic Strategy.

Financial Implications

- 37. Many of the actions are already identified and funded in the City's Capital Works program, like the Dixon Street public domain upgrades, and the existing budgets.

38. Some key aspects are not yet accounted for. These include:
 - (a) Dixon Street shopfront improvement program – an estimated \$900,000 over three years
 - (b) additional precinct activation grant funding – an estimated \$600,000 over three years
 - (c) Haymarket coordinator position for three years
 - (d) SXSW Sydney – being an estimated \$100,000 per year.
39. Any future expenditure not currently budgeted for, including for grants programs and staff to support implementation of the strategy, will be subject to future public exhibition processes under the Local Government Act 1993.
40. Improvement schemes would be limited in both time and money to catalyse transformation and introduce changes which become self-sustaining. For example, shopfront improvements would be limited to three years with a total funding cap. These grants would be match-funded by landowners to encourage the reimagining of shopfronts and offers and generate activation and attraction on Dixon Street.
41. Overall, most of the actions for revitalisation in this draft Strategy can be accommodated within existing budgets and resources, and those with longer lead in times can be factored into iterations of the City's Long Term Financial Plan.

Critical Dates / Time Frames

42. It is proposed to exhibit the draft Strategy for a minimum period of four weeks and report a final Strategy back to Council in late 2023.

Public Consultation

43. The following public consultation has been undertaken:
 - (a) Early Engagement - February to April 2022. This included:
 - (i) engagement with key stakeholders (February 2022) to inform engagement activities
 - (ii) doorknock of Chinatown businesses (March 2022) in Dixon Street, Little Hay Street, and Thomas Street, to seek their feedback on the markets and how Dixon Street could be improved.
 - (iii) a consultation stall at the Dixon Street night markets (April 2022)
 - (b) Community Engagement, 'Have your Say on Future of Haymarket', from 10 August to 21 September 2022. This included:
 - (i) an online survey (in English, Traditional Chinese, Simplified Chinese, Thai, Korean, Indonesian), completed by more than 950 people;

- (ii) a Lord Mayor community forum at Lower Town Hall House on the 24 August 2022, attended by about 110 people; and
 - (iii) pop-up consultation stands in five Haymarket locations:
 - a. Dixon Street on 6 September and 16 September 2022
 - b. Thomas Street near Ultimo Road on 6 September 2022
 - c. Campbell Street at George Street near Light Rail stop on 8 September and 16 September 2022.
 - d. George Street at Goulburn Street near World Square on 13 September 2022
 - e. Pitt Street near Goulburn Street on 15 September 2022
 - (c) Key themes arising from public consultation undertaken to date have been described in the Engagement Outcomes Report provided at Attachment B and summarising in the Community Vision for Haymarket Attachment C.
44. To inform the Economic Study, 14 stakeholder interviews were held in Q3 2022, including landowners, businesses, property agents, researchers, and public bodies. This feedback is summarised in the Study (Attachment D) and has informed the findings and conclusions of the report.
45. Panel and community consultation on the draft Historic Thematic Study, including two workshops on 20 December 2022 and 17 January 2023 and 13 submissions were made. This revised Chinatown Historic Thematic Study (Attachment E) has been updated to respond to this feedback.
46. Engagement with key stakeholders has continued throughout 2023, including briefings with 23 key stakeholders on the draft Revitalisation Strategy in June 2023.
47. Consultation and engagement with the community on the draft Strategy will inform its finalisation. Consultation, for a minimum of 28 days, will include a range of actions to ensure community feedback is received on the draft Strategy and ensure the local community is aware of the draft Strategy. Consultation would take place in parallel with the draft Haymarket Public Domain Plan.
48. Consultation activities will include:
- (a) multi-lingual advertising and information
 - (b) 'Have your say' page on the City's website
 - (c) survey of views on projects and priorities
 - (d) Lord Mayor forum on 5 September 2023 and
 - (e) pop up consultation stands in Haymarket.

GRAHAM JAHN AM

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