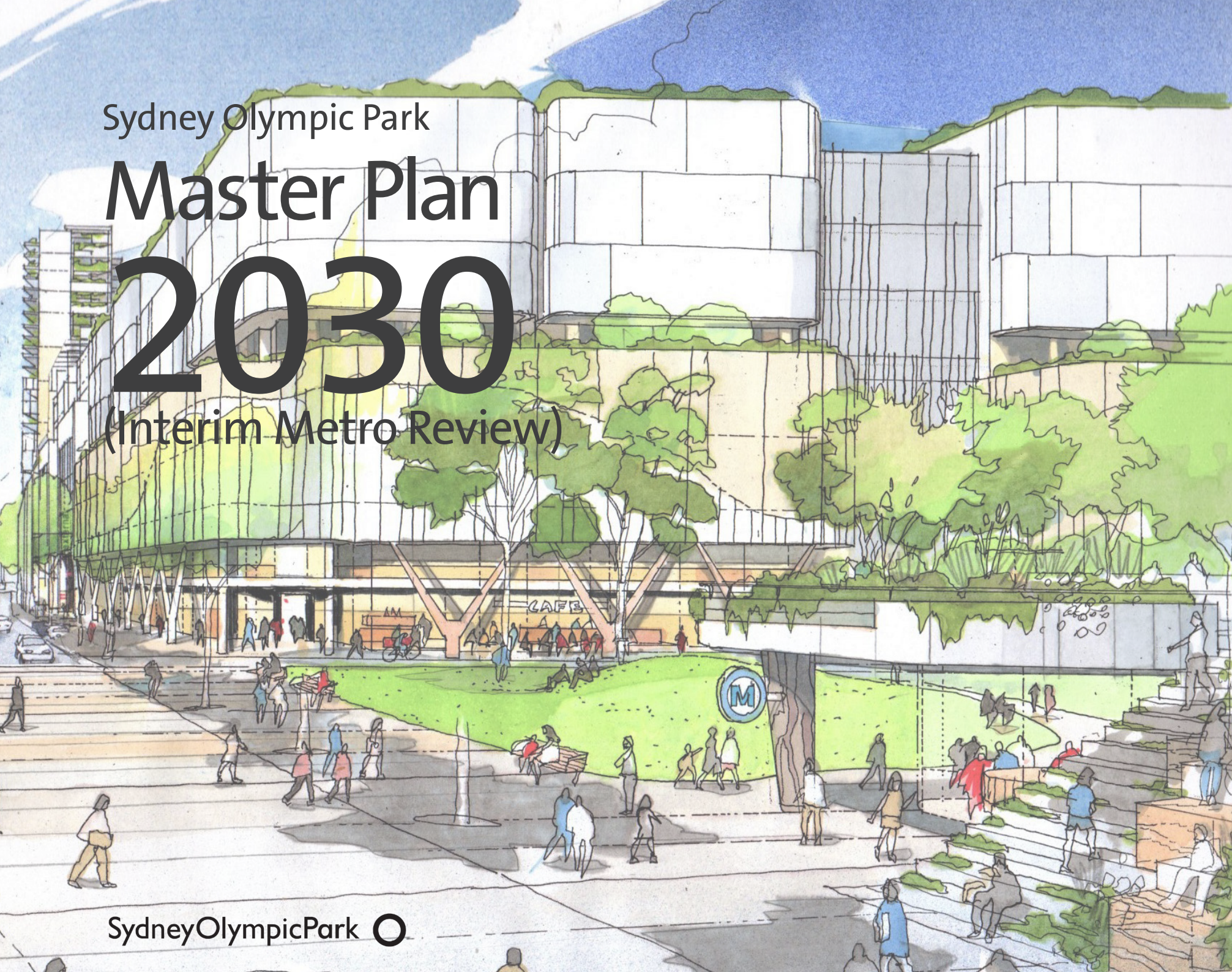


Sydney Olympic Park

Master Plan

2030

(Interim Metro Review)



SydneyOlympicPark 

ANNEXURE 10: RETAIL MASTER PLAN,
VISION & STRATEGY

SYDNEY OLYMPIC PARK

RETAIL MASTERPLAN VISION AND STRATEGY

JULY 2021

An immense precinct, evolving from a place of global sporting excellence into a mixed-use 'Lifestyle Super Precinct'.



EXECUTIVE SUMMARY

OVERVIEW

Having capitalised on its beautiful eastern suburbs and shoreline in the past, Sydney's future will now be forged to the west. From the Western Parklands City and Aerotropolis in towards Parramatta and through towards the OBD fringe, vast acts of urban renewal will recast the experiences made available to Sydney's growing population.

Sydney Olympic Park is a highly visible and socially significant piece of the western growth puzzle. It is an immense precinct, evolving from a place of global sporting excellence into a mixed-use 'Lifestyle Super Precinct' that bears a distinct local feel. Retail has an exceptionally important role to play in this transformation, both in adding to the spectacle and by creating experiences that underpin an everyday quality of life for future residents and regular visitors.

SOPA has commissioned a Sydney Olympic Park Retail Masterplan Vision & Strategy to ensure that this important kind of economic and social activity makes the greatest possible contribution to place.

KEY FINDINGS

MARKET SIZE

The retail market size is forecast to grow rapidly. The population of the market trade area (both Primary and Secondary) was 78,000 in 2016. By 2041, the Market Trade Area will grow to 160,000 – an increase of 104%. The Primary Trade Area will grow from 4,500 in 2021 to nearly 27,000 by 2041 (Source: forecast.id and TfNSW).

RETAIL DEMAND

There is significant future retail demand. Sydney Olympic Park's projected audience growth of residents, visitors and workers will require 122,000 SQM of retail by 2031 (Hill PDA).

RETAIL POSITIONING

Sydney Olympic Park's verdant landscape, First Nations, colonial and Olympic significance provide a unique opportunity to create a competitive retail destination. While regional retail competition is formidable, the site's unique attributes and its own Metro Station support the development of a significant retail offer.

RETAIL DELIVERY

There is a real need for cohesion. Retail success at Sydney Olympic Park is highly dependent upon a clear precinct-wide vision, collaboration between large stakeholders and separation of retail offer between sub-precincts.

KEY OUTCOMES

Sydney Olympic Park's retail offer will bring the 'lifestyle super precinct' to life through a mix of products and places that are genuinely unique within the city, Australia and even the world.

The primary objectives of the retail are:

1. To adjust perception of Sydney Olympic Park from being solely a great place for events to also having layers of desirable everyday experience
2. To define each of the sub-precincts as a unique proposition
3. To create a thriving local economy the creates and sustains employment
4. To drive social cohesion

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CONTEXT

PLACE NARRATIVE

Few places offer such contrasting experiences as Sydney Olympic Park: it's busy then quiet; it's urban then green; it's man-made, but full of nature; it's close to the central city, but can feel far away.

Sydney Olympic Parks transition from destination to place has not progressed evenly, but as government investment in infrastructure comes to life and private sector investment in property follows, the precinct is shape-shifting into a new mixed-use place that aims to make Sydney as proud as it was in 2000.

Sydney has many great places to go to but it needs more great places to be from. Sydney Olympic Park is addressing this imbalance.



Wangal Country

Past, present and future sacred lands that have co-evolved, been cared for and cultivated over millennia



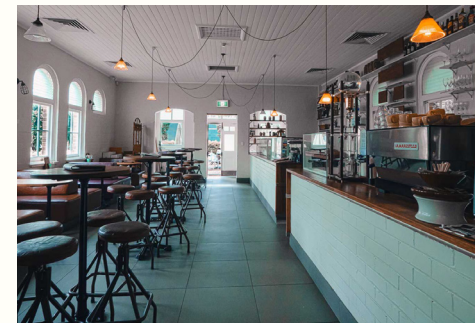
Green Games

A sporting legacy that involved the vast restoration of parkland's



Multimodel

A ground plane with diverse forms of moment co-existing in harmony



In between

A key piece of The Metropolis of Three Cities story as the links begin to bridge The East and The West



Connected

Linked by international best-in-class transport connections



Dense

A populated, energised and compacted place with a diversity of people and experiences on hand

PAST

WANNAL COUNTRY

Sydney Olympic Park is Wannal Country. Until European arrival, the Wann clan had lived with the estuarine ecosystems for thousands of years, sustainably harvesting resources and using the waterways as a transport network.

MATERIAL ECONOMY

A range of European industries began – horse racing, logging, salt pans and cattle farming – and at the turn of the 20th century SOP's value to the burgeoning city was realised. State-significant industries were introduced including an armoury, brickworks and an abattoir.

GREEN GAMES

As the land became polluted, occupied by aging industries, the state created a long-term plan to restore the land, transforming the area into a large green park with event infrastructure at its heart, culminating in the 2000 Olympic Games.

PRESENT

MULTI-MODEL

Large infrastructure and events create an energy and rhythm that dominates the experience of SOP. The public spaces, retail and transport are all geared to operating in different passive, active and super-activated modes.

IN-BETWEEN

Sydney Olympic Park sits between the two great urban centres of Parramatta and central Sydney. It is also in a critical transitional phase as it shifts from being an events space to an urban place. This opportunity brings excitement, but also risk and uncertainty.

EMERGENT

Around 16,000 people work in SOP in 2021 at the moment. New shoots of culture are emerging in the area as the residential population grows and develops its own habits and character.

FUTURE

CONNECTED

Over the next 10–15 years major transport projects will weave SOP into the urban fabric of the city. WestConnex, Metro West, Parramatta Light Rail and cycling and pedestrian routes will transform SOP's relationship with the broader city.

DENSE

Around 2,000 people live in Sydney Olympic Park at the moment, but this number is expected to grow to over 20,000. This will happen in a relatively small footprint, creating a new vertical city within a large parkland.

DISTRIBUTED

The new Sydney Olympic Park will demand, and create, new and distributed areas of public and commercial activity. A new Town Centre, increased patronage of parks and activated public spaces will make for a vibrant distributed suburb.

PLACE

URBAN DYNAMICS

"It's time for a change of perspective and a change in the way we all imagine Greater Sydney. Greater Sydney needs a true city at its centre, close to its heart."

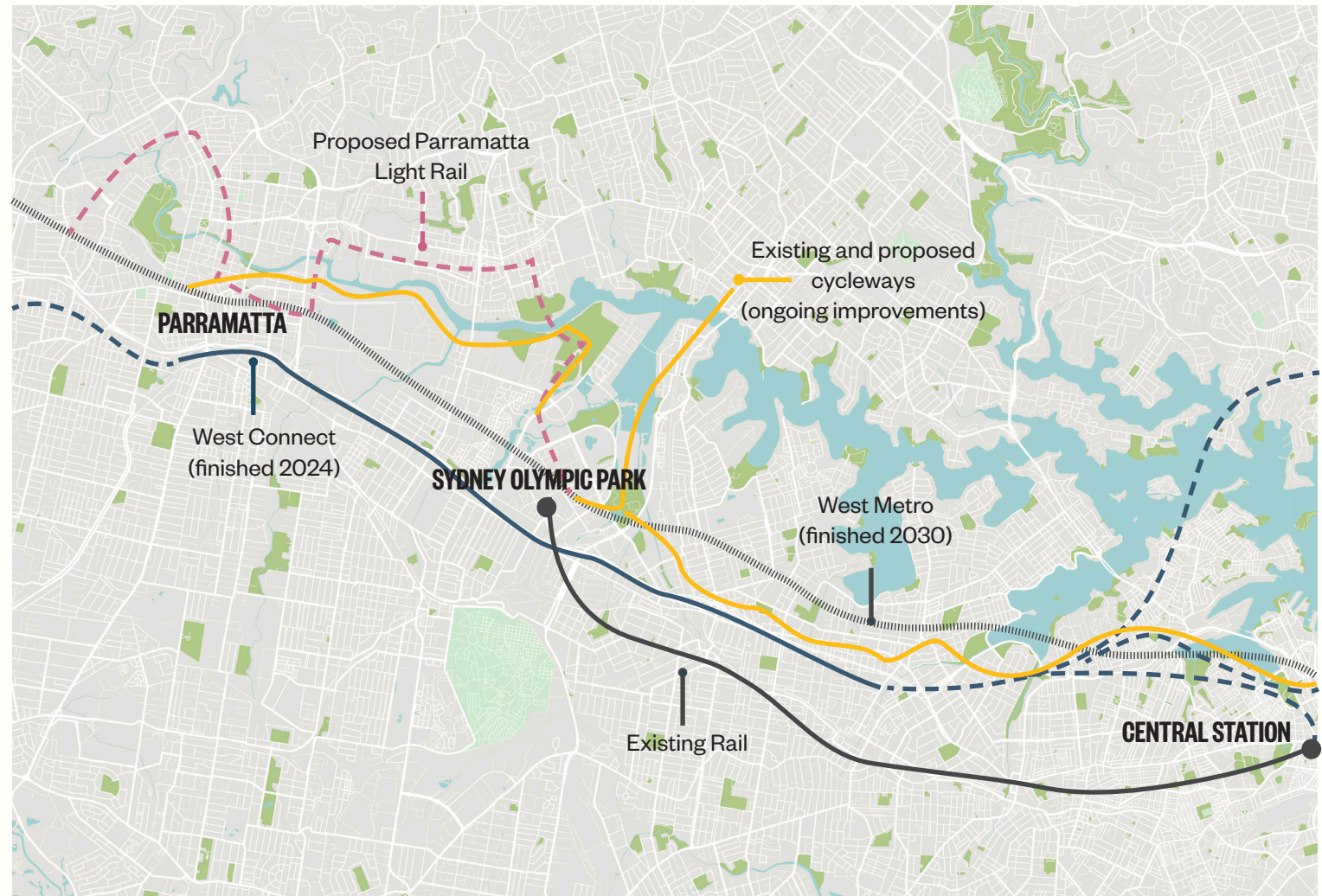
Lucy Turnbull, Commission for Greater Sydney

The Sydney Olympic Park of the not too distant future will be radically different to the Sydney Olympic Park of today. As immense public and private investment in the Western Growth Corridor comes to fruition the site will move from a peripheral to central place in the mind of Sydneysiders.

Connections to the surrounding suburbs and two major business areas will be improved.

Key travel times:

- **Rail:** 18 minutes to Parramatta / 30 minutes to CBD
- **Future West Metro:** peak service every four minutes – 6 minutes to Parramatta / 14 minutes to CBD
- **WestConnex:** 10 minutes to Parramatta / 20 minutes to CBD
- **Parramatta Light Rail:** 30 minutes to Parramatta
- **Cycling:** 1 hour to the CBD (around 100,000 people live within a 15 minute ride of SOP)



PEOPLE FORECASTS

FUTURE CUSTOMER CATEGORIES AND PROFILES

RESIDENTS

- YOUNG PROFESSIONALS
- YOUNG FAMILIES
- RETIREEES

WORKERS

- OFFICE WORKERS
- EVENT AND RETAIL WORKERS

VISITORS

- LOCAL EVENT-GOERS
- LOCAL NON-EVENT-GOERS
- OVERNIGHTERS

OTHER

- STUDENTS
- ATHLETES

Detailed Customer Profiles are provided in the Appendix to this document.

RESIDENTS

YOUNG PROFESSIONALS

WE ARE:

Young, mainly Chinese and Korean, professionals who work in the CBD or Parramatta

WE WANT:

To balance the best of Sydney's lifestyle with some Pan-Asian experiences



YOUNG FAMILIES

WE ARE:

Parents with young kids who willingly live in apartments

WE WANT:

A safe and healthy place with fun places for kids and adults



RETIREES

WE ARE:

Cashed-up downsizers looking for a relaxing place to live

WE WANT:

All the benefits of the city but none of the stress and noise



WORKERS

OFFICE WORKERS

WE ARE:

White collar workers in the knowledge and service industry who work in an office at Sydney Olympic Park

WE WANT:

Convenience, affordability and healthy spaces underpinning an enjoyable work life



EVENT AND RETAIL WORKERS

WE ARE:

Blue collar and casual employees who work events and in retail around Sydney Olympic Park

WE WANT:

Connectivity, excellent amenity, sophisticated industry standards



VISITORS

LOCAL EVENT GOERS

WE ARE:

Fans who want to see our favourite team, artist or event

WE WANT:

Primary action (the performance) and secondary action (the social experience)



LOCAL NON-EVENT GOERS

WE ARE:

Families and locals from nearby suburbs and visitors exploring Sydney

WE WANT:

To experience things that the city doesn't offer – retail, the Olympic story, unique landscapes, and quiet parklands



OVERNIGHTERS

WE ARE:

Visitors staying the night, often from interstate to see their favourite team and to explore Sydney from a central location

WE WANT:

To visit world class venues with excellent amenity, have a great time before and after



OTHER

SCHOOL STUDENTS

WE ARE:

Kindergarten to Year 12 learning in the natural environment about sustainability, arts and sport

WE WANT:

Immersive and captivating education experiences



ATHLETES

WE ARE:

Amateur and professional athletes with a passion for our chosen sport

WE WANT:

A place with world-class facilities and supportive amenity and infrastructure



UNIVERSITY STUDENTS

WE ARE:

International students mainly with migrant, refugee or educationally-disrupted backgrounds.

WE WANT:

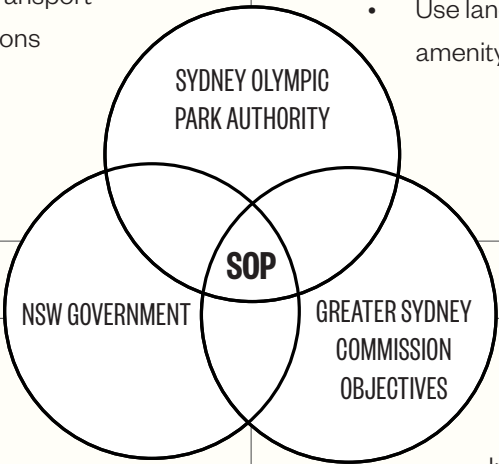
Education that is integrated with the community.



POLICY
DASHBOARD

SOP's governance structure is carried over from its Olympic legacy and gives it a unique capacity to deliver positive change.

PHYSICAL OBJECTIVES	ENVIRONMENTAL OBJECTIVES
<ul style="list-style-type: none">Invest in transport with the new Sydney Metro West to support significant housing growth (GSC 2018)Develop 'modern, sustainable and flexible commercial office space within a green oasis' (GSC 2016)Identify as a 'Lifestyle Super Precinct' requiring a world 'total transport solution', cycling and walking infrastructure, and car share options (GSC 2016)	<ul style="list-style-type: none">Embed sustainability as a core priority for all decision making for the precinctRetain Green Star Community 6-star rating (SOP 2019)Protect 430 hectares of conservation land, supporting over 250 native animal species and over 400 native plant species (Environmental Guidelines 2008)Use landscaping corridors and smaller green parks to provide ecological amenity to urban areas. Masterplan 2030 (2018 Review)
CULTURAL OBJECTIVES	SOCIAL OBJECTIVES
<ul style="list-style-type: none">A world-leading precinct where Aboriginal and Torres Strait Islander peoples and cultures are seen, celebrated and valued.Retain existing capacity to host world-class events to 'showcase inspiring and inclusive city-scale events' (GSC 2016) while also developing a local cultural economyCreate new Place and Activation Strategy Team to build local culture (SOPA 2018)Provide ongoing opportunities and support for the Aboriginal and Torres Strait Islander communities and their unique knowledge (SOPA RAP 2019)	<ul style="list-style-type: none">Increase health and education facilities to support population growth (GPOP 2019)Include affordable options amongst a range of housing typologies (GSC 2016)Broaden economic trading hours (18-24 hours) to enhance the night-time economy (Masterplan 2018)Access and inclusion: access isn't just about buildingsBecoming Australia's events capital for cultural, entertainment, recreation and sporting eventsCreating a sustainable community to live, work and study



RETAIL MARKET KEY INSIGHTS

The number of people who will live or work within striking distance of Sydney Olympic Park is considerable, supporting retail scale and diversity.

MARKET TRADE AREA

- The population of the Market Trade Area (MTA), (both Primary and Secondary Trade Area - STA) was 78,000 in 2016
- By 2041, the Market Trade Area will grow to 160,000 – an increase of 104%
- The Primary Trade Area will grow from 4,500 in 2021 to nearly 27,000 by 2041
(Source: forecast.id and TfNSW)

RETAIL SPEND

- Almost \$1.5B in Market Trade Area by 2021
- By 2041 expected to increase to \$2.8B
(Source: Hill PDA 2020)

TWO SPEED

- Overall, about 46% of annual town centre precinct electronic sales (pre-COVID) were generated on Event Days, with more than half of this generated after 5pm on Event Days (Quantium)

COMMONALITY

- The MTA and STA audiences are defined more by their retail and financial similarities rather than differences (Hill PDA 2020)

OUTSIDERS

- Local residents only contribute 14% of precinct electronic spend, and about 19% on non-Event days (Quantium)

COMPETITION

- Traditional malls and underwhelming strips, with a few culturally-led great spots such as Ashfield (Hill PDA 2020)

ONE-SHOP WONDERS

- Sydney Metro Visitors repeat visitation is less than 20% (Quantium)

ROOM TO DO THINGS

- Retail demand projections by Hill PDA forecast a further 66,471 sqm of new retail in SOP to 2031 (Hill PDA 2020)

RETAIL MARKET COMPETITOR MAPPING

Sydney Olympic Park sits within a highly competitive retail market with both neighbourhood strips and shopping centres vying for trade area spend.

TRADE MARKET AREA

- Primary Trade Area
- Secondary Trade Are

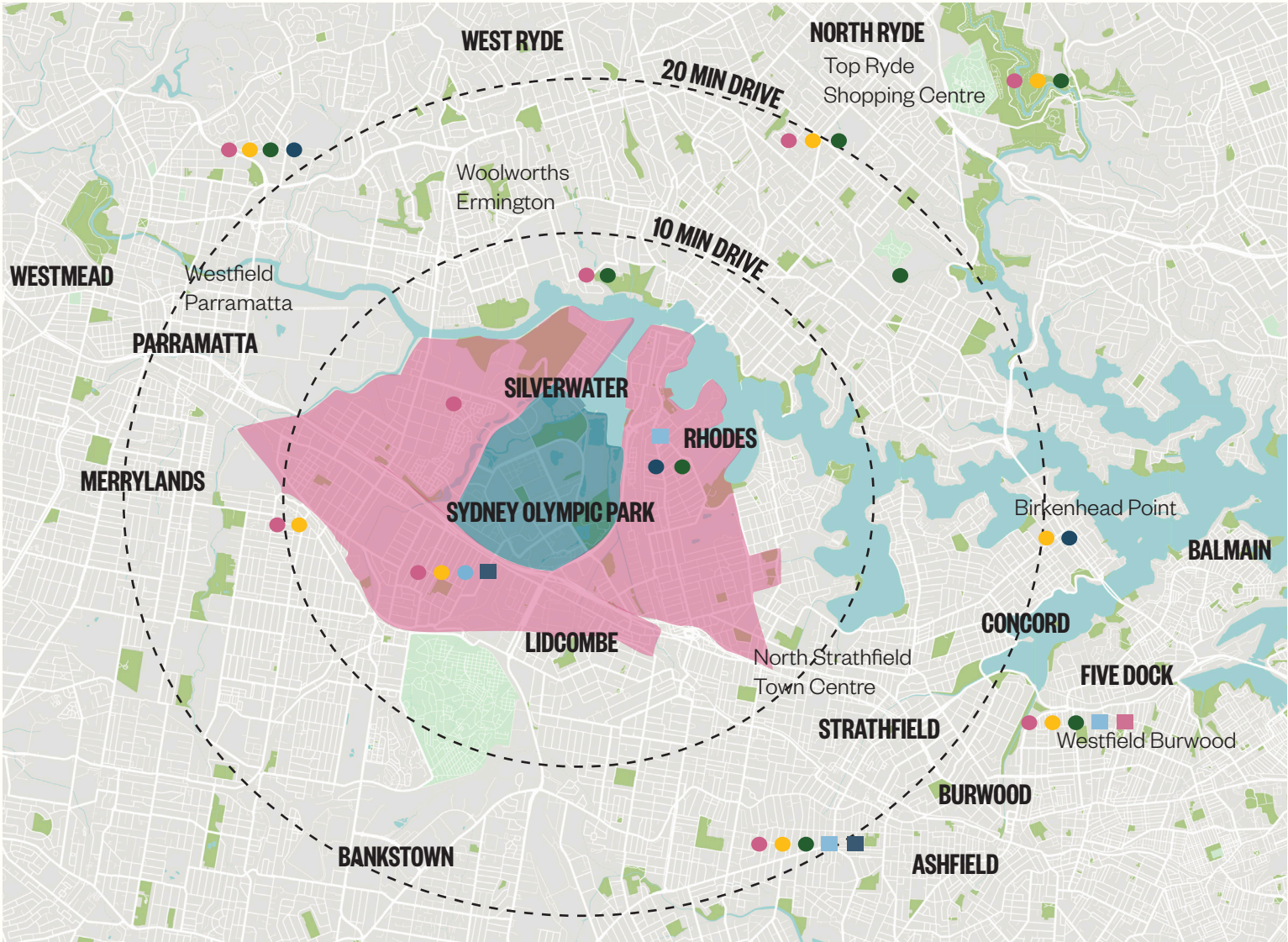
Supermarkets

- Woolworths
- Coles
- Aldi
- Supa IGA
- Cost Co - Wholsale

Department Store

- David Jones
- Myer
- Big W
- Kmart
- Target

* A summary of retail competitors is provided in the Appendix to this report



RETAIL VISION

RETAIL VISION STATEMENT

Great retail is about much more than a transaction of money for goods. It also builds community, strengthens place identity and creates local economic opportunity.

As Sydney Olympic Park continues its positive evolution from a focal point for global sporting excellence into a mixed-use neighbourhood with a proud Olympic legacy, retail will become an increasingly significant part of the overall precinct experience. The shops, markets and retail moments within Sydney Olympic Park are a precious opportunity to make positive impressions on customers through service and product.

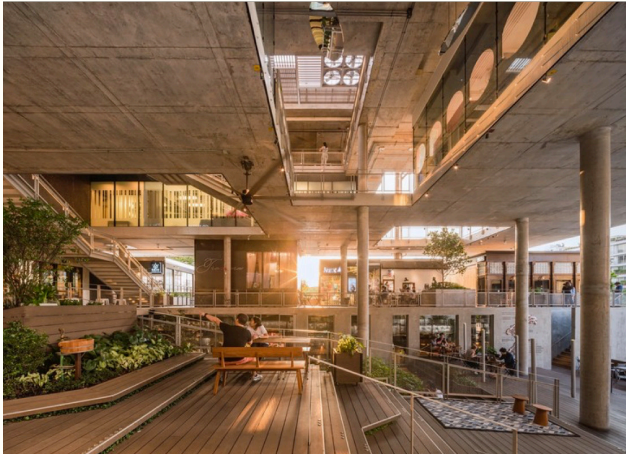
Sydney Olympic Park's retail offer will bring the 'lifestyle super precinct' to life through a mix of products and places that are genuinely unique within the city, Australia and even the world. On leafy retail lanes, in high-impact brand stores, up in buildings, down in basements, on podiums and along streets, retail will create a psychic charge for Sydney Olympic Park and carve out an even clearer reason for people to return again and again.

Sydney Olympic Park's retail offer will bring the 'lifestyle super precinct' alive through a mix of products, services and places that are genuinely unique within the city, Australia and even the world.



RETAIL EXPERIENCE MOODBOARD

On leafy retail lanes, in high-impact brand stores, up in buildings, down in basements, on podiums and along streets, retail will create a psychic charge for Sydney Olympic Park.



'Healthy' shopping plazas
The Commons, Bangkok



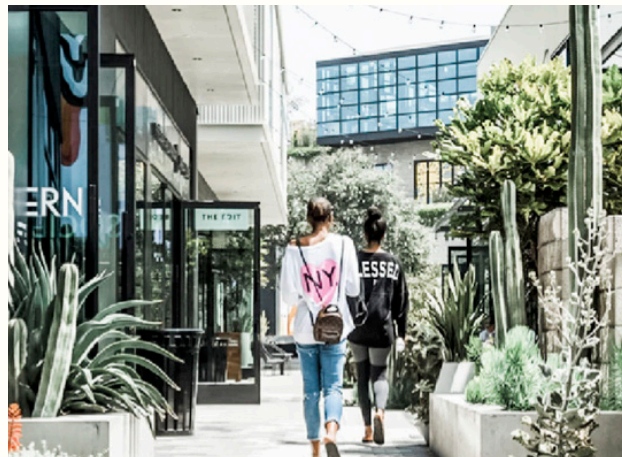
Retail knitted into stadia
Navy yards, Washington



Amplified verticality
Tokyu Plaza, Tokyo



Wellbeing design and biophilia
Murir, SEO



Blurred edges
James Street, Brisbane



Rooftop activation
Burwood Brickworks, Melbourne

RETAIL VISION SUCCESS CRITERIA

The retail success criteria provide an aspiration rather than a set of mandatory obligations.

A set of retail success criteria has been developed to guide discussion, concept development and decisions on retail.

Crucially, these criteria also ensure that the offer aligns with the broader values and vision for Sydney Olympic Park, making retail a powerful tool for creating the kind of place that SOPA and the people of Sydney want to see.

Viewed at the scale of an individual retailer, a sub-precinct or across the entirety of Sydney Olympic Park, they call out the qualities that will drive the highest and best retail outcomes.

1) DESIRABLE

Will people want it?

2) FEASIBLE

Is it technically/practically possible?

3) VIABLE

Is it self-sustaining economically?

4) SUSTAINABLE

Does it minimise its ecological footprint?

5) SOCIAL

Does it enable interactions between people?

6) RESPECTFUL

Does it include everyone and acknowledge the history of the site?

RETAIL VISION MASTERPLAN VIEW

PROPOSED AND EXISTING RETAIL 2031:

Central Precinct:	61,050 sqm
Stadia Precinct:	10,000 sqm
Existing Retail	13,000 sqm
Carter Street:	12,000 sqm

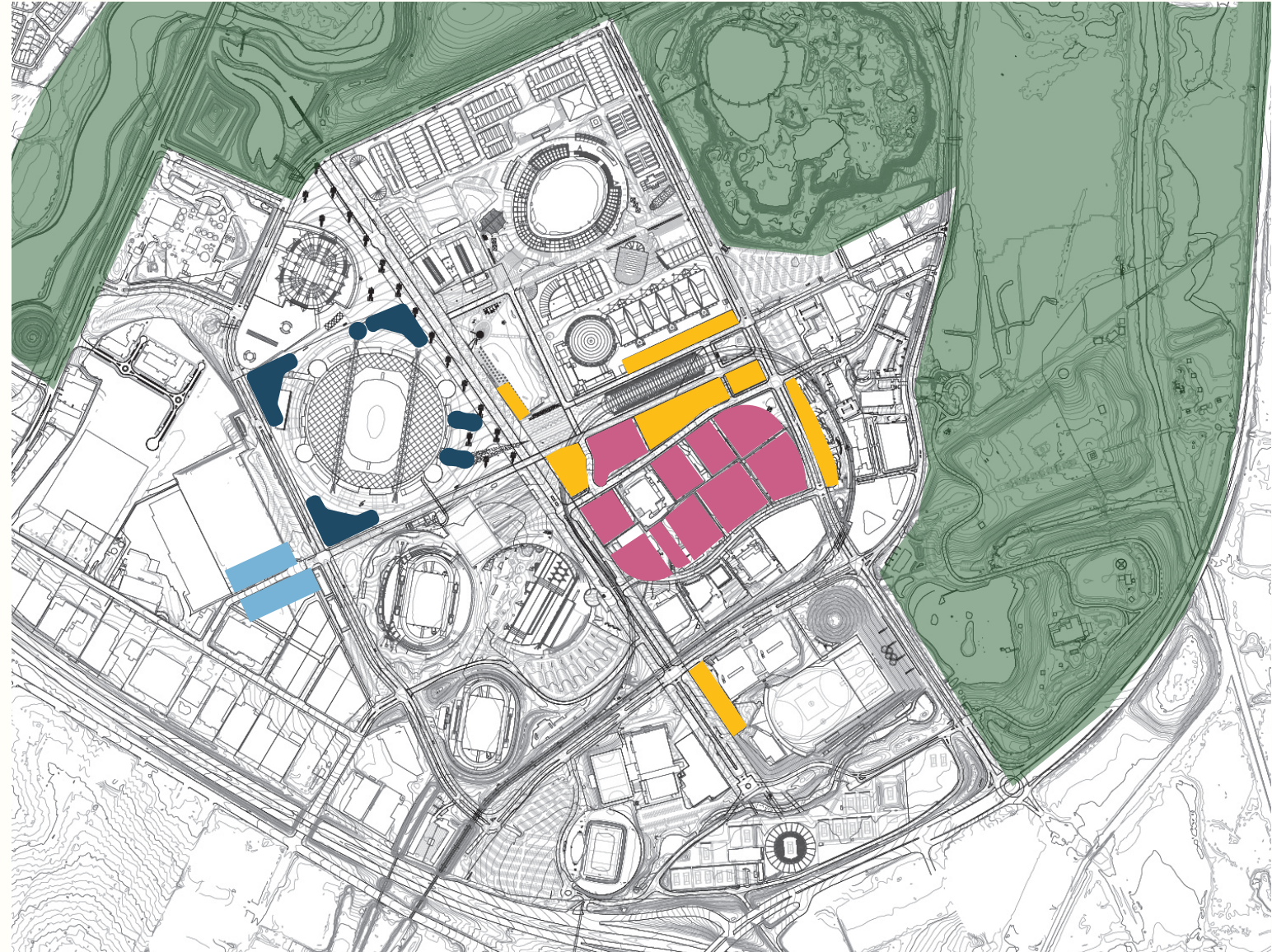
Total: 95,050 sqm

RETAIL DEMAND 2031 (HILL PDA):

- 122,000 sqm

DEMAND GAP 2031:

- 28,000 sqm



PRECINCT DESCRIPTORS

CENTRAL PRECINCT

THE OUTDOOR MALL

CENTRAL PLAZA

VERTICAL RETAIL STACKS

WELLNESS & BEAUTY HUB

THE ABATTOIR GREEN

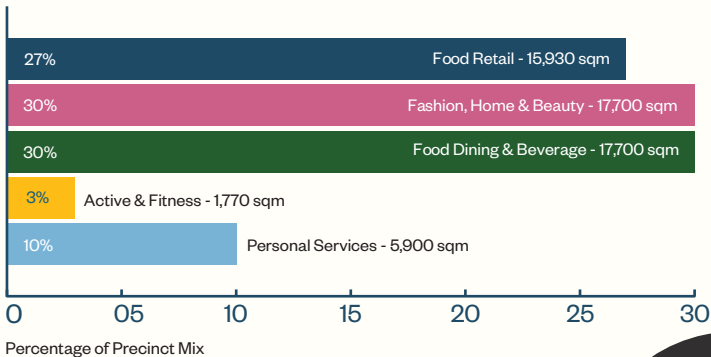
CENTRAL PRECINCT OVERVIEW

The scale of a mall with the feel of a neighbourhood.

Central Precinct will be Sydney Olympic Park’s ‘retail neighbourhood’.

The site’s unfair advantage is that it draws upon both people welling up from the Sydney Metro station below and people coming down from the apartments above. The critical mass of customers supports a retail offer that has the scale of a mall, but which can feel more like a neighbourhood of retail-lined streets and social shopping experiences.

RETAIL MIX



AUDIENCE HIERARCHY

- Resident
- Visitor
- Worker
- Other

LEAD CONCEPTS

- Outdoor Mall
- Central Plaza
- Vertical Retail Stacks
- Wellness & Beauty Hub
- The Abattoir Green

RETAIL NEIGHBOURHOOD

EXPERIENCE DRIVERS

- Convenience
- Socialising
- Exploration

CENTRAL PRECINCT INDICATIVE MASTERPLAN

Area Breakdown

- The Outdoor Mall
- Central Plaza
- Vertical Retail Stacks
- Wellness & Beauty Hub
- The Abattoir Green



CENTRAL PRECINCT MOODBOARD



Vertical exploration
Tokyu Plaza, Tokyo



Cool and green
Costa Rica Athletic Centre, Costa Rica



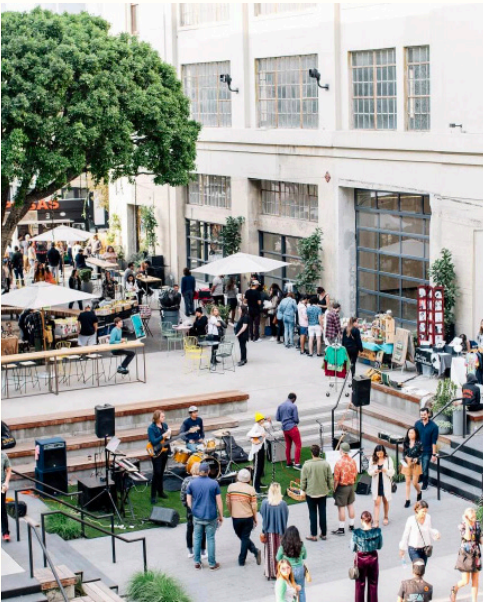
Soft Streets
James Street, Brisbane



The Outdoor Mall
The Commons, Bangkok



Complementary to residential
Piazza at Schmidts, Philadelphia



Products and experiences
Row DTLA, Los Angeles



Nighttime economy
Janet Echelmann Sculpture, SEO

LEAD CONCEPT: THE OUTDOOR MALL

DESCRIPTOR

SOP undeniably needs a mall to service its residential population and drive visitation, but to be distinctive in a highly competitive trade area it needs a unique proposition: an outdoor mall.

An outdoor mall has both scale (nearly 60,000 sqm) and diversity of retail to provide a compelling product offer within the retail trade area, but by accentuating outdoor spaces and fine-tuning the internal design to bring nature inside, the Central Precinct will be able to provide all the choice of a shopping centre with the feeling of a neighbourhood street.

KEY MOVES

- Ensure the sustainability agenda is visibly present
- Maximise and hero retail street frontages, encouraging people to move outside as much as possible
- Curate blocks or buildings so they have a unique product focus (e.g. a fresh food quarter, fashion and lifestyle street, technology tower)
- Make it feel like a street and function like a mall

SOP undeniably needs a mall, but to be distinctive it needs a unique proposition: an outdoor mall.



The Commons, Bangkok

OUTDOOR MALL: EXPERIENCE BENCHMARKS

RETAIL STREETS FASHION WALK, HONG KONG

Hong Kong's Fashion Walk is a four city-block collection of reputable fashion and F&B retail. The genius behind the precinct is the way it manages traffic in a very busy city. The streets on the perimeter function as normal, but within the precinct they are reserved for deliveries in the morning and transposed to food and beverage seating in the afternoons/evenings. This makes people feel safe, slow down and spend time adequately browsing.



BREATHABLE BUILDINGS THE COMMONS, BANGKOK

The Commons has two locations in Bangkok, bringing its uniquely scaled retail malls (6,000 sqm) and natural design into the heart of the city. By opening up retail to views and fresh air and providing internal dwell spots, The Commons have become oases and create a level of comfort which encourages browsing and socialising.



NATURAL WAYFINDING CENTRAL EMBASSY, BANGKOK

Central Embassy's main atrium includes a multi-storey hanging garden and waterfall. It's beautiful to look at and supports a refreshing micro-climate, but what makes it most useful is that it is an orientation device seen hanging down between the levels of the mall from almost anywhere you stand. This enables shoppers to find their bearings, their stores and their friends without blinking screens and flashing arrows for wayfinding.



STREET RITUALS GINZA, TOKYO

Tokyo's most luxurious shopping district has almost every global flagship in the world, creating a unique experience of product. But what gives it an edge is its ritual street closure. Every day through summer and autumn the main street is closed to traffic from midday to 5pm, allowing retailers and the local prefecture to populate the spine of the precinct with food kiosks, seating and performance.



GREEN PATHS LOG ROAD, TOKYO

Log Road in Daikanyama, Tokyo uses trees, ferns and beautiful street furniture to make even the narrowest of journeys relaxing and enjoyable. The urban design logic of the Central Precinct will provide both streets and lanes, but additional care must be given to pedestrian pathways that provide a different scale and intensity of passage through the site.

OUTDOOR MALL: IMPLICATIONS

RETAIL MIX

- The outdoor mall as a concept will be applied to the streets, lanes and squares of retail that include the sub-precincts of: The Wellness Hub; Central Plaza; Metro and the Town Centre.

DESIGN

- Create a true neighborhood feeling with connected open-air streetscapes, lanes, squares and atriums so people feel connected to the time of day and outside conditions.
- Future-proof the experience with naturally ventilated healthy and hygienic spaces that accommodate for the “new normal” COVID-type conditions of 1.5m spacing rules and a contactless customer journey.
- Use various architectural forms, natural palettes and embellishments as a means to define buildings and create memorable streetscapes to place sub-precincts.
- Utilise biophilic principles with lots of natural light, abundant landscaping and unusual planting to style and create a unique customer experience as a way to differentiate Central Plaza from a typical mall.
- Cater for all-year weather comfort and conditions, taking into account the sun, wind and rain with operable devices, high-level roofs and screens to maximise comfort levels.

OPERATIONS

- Design in contactless deliveries and pick-up points to ensure the retail is future-proofed for pandemic conditions and a digital consumer.
- Ensure operations and staff are able to maintain high standards of health and hygiene with additional amenities, cleaning, bussing and sanitisation locations throughout.
- F&B operators encouraged to provide and maintain own amenities within premises to provide the best customer experience.
- Ensure retailers adopt new digital technologies to allow customers to order direct from tables, tablets and mobile phones as well as contactless checkouts.

COMMERCIAL

- Factor in the full life cycle energy and operational cost savings to be made with designing for the use of natural light and ventilation.

LEASE CONDITIONS

F&B

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

Speciality Retail

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

Supermarket

- 10–20 yr lease gross rent (incl. outgoings/promo levy) + % rent (turnover)

LEAD CONCEPT: CENTRAL PLAZA

DESCRIPTOR

Central Plaza is the public realm area between the Metro station and the Stadia Precinct, and highly important from a retail and place perspective.

As the location where crowds alight from the Metro station to watch the action in the Stadia Precinct, Central Plaza should create an immediate sense of arrival, providing a warm welcome and starting the action of SOP immediately. This high-intensity pedestrian path will maximise every metre of the customer's journey from the station into the precincts, making it a high-value retail position.

KEY MOVES

- Use technology, performance and retail brands to create a spectacle
- Surround the plaza with multi-height retail space housing casual food and beverage for social interest
- Provide different-intensity pedestrian flows through responsive wayfinding and intuitive landscape design

A warm welcome to
Sydney Olympic Park
via its future #1 door.



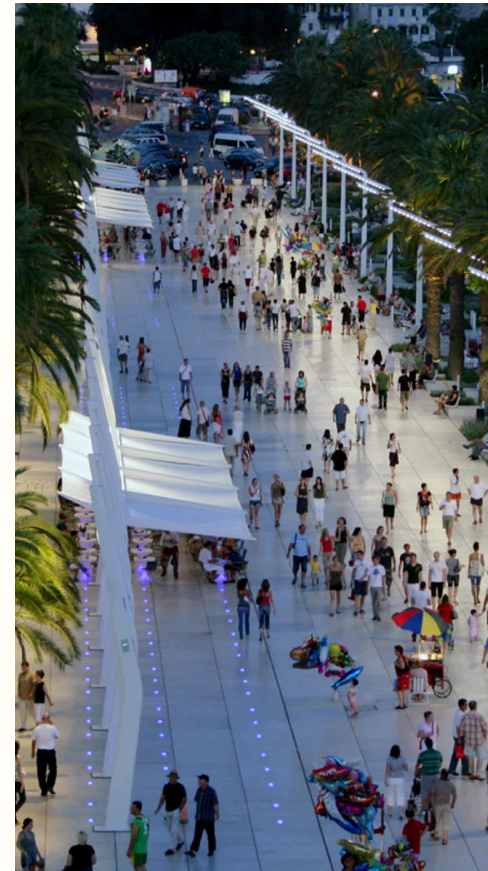
Shibuya Crossing, Tokyo

CENTRAL PLAZA: EXPERIENCE BENCHMARKS

SIGHT & SOUND SHIBUYA CROSSING, TOKYO



Shibuya Crossing is a scramble crossing that processes up to 3,000 people at a time – the busiest and best-known pedestrian crossing in the world. A sensorial wonderland with large screens showing digital art, news headlines and lucrative advertising slots, the crossing is home to one of Starbucks' busiest stores, Tsutaya Books' flagship and many more retailers who understand that people watching is a powerful attractor.



SELF-ORGANISING PATHWAYS ↑ SPLIT ESPLANADE, SPLIT

Split's esplanade effortlessly processes large crowds who want to stroll and smaller crowds seeking out the food and beverage offer along the waterfront. The key to its success is its lack of heavy-handed wayfinding. Through smart and beautiful planting, lighting and furniture the crowds naturally organise themselves into streams of lower and higher intensity, allowing a brisk walk or a leisurely browse.



ARCHITECTURAL ICON ↑ TIMES SQUARE TKTS BOOTH, NEW YORK CITY

Beating 631 entrants, a local Sydney architectural firm won a fierce competition to design a new ticket booth for New York's Times Square. Their TKTS building – featuring the famous red steps – is beautiful, practical and unconventional, and has immediately become one of the city's most photographed and used public spaces, proving the placemaking power of bold architecture.

CENTRAL PLAZA: IMPLICATIONS

RETAIL MIX

- All-day café dining
- Quick service takeaway
- Restaurants
- Everyday needs
- Smaller brand pop-up
- Larger experiential pop-up
- Supermarket

DESIGN

- The design of Central Plaza needs to create an exciting place that makes you feel like you have arrived at the centre of the action, a space that can flex and adapt with moving parts to change pace from slow to peak, during event and non-event times.
- Provide tiers of activity and views from above.
- Create a high-energy vibe by activating upper-level perimeter façades with large-scale art or imagery on LED screens.
- Landscape the ground plane to define fast to slow traffic zones as well as define main event locations and smaller activations.
- Allow for flexible streetscapes with operable awnings and lighting allowing for additional remote licensed seating areas and intimacy that appear during hospitality peak periods and pack away when large-scale events are on.
- Place supermarkets or convenience in discreet locations so as not to bring down the high energy.

OPERATIONS

- Provide cultural and entertainment programming to cultivate a streetscape filled with activity and excitement all year round.
- Provide event-ready infrastructure for bookable events (i.e. sound, lighting, screens, storage, etc.)
- Invest in a quality sound system and lighting effects that activate the plaza, allow control over the atmosphere from peak to non-peak periods and give the ability to really put on a show.
- Design in contactless deliveries and pick-up points to ensure the retail is future-proofed for pandemic conditions and a digital consumer.
- Ensure operations and staff are able to maintain high standards of health and hygiene with additional amenities, cleaning, bussing and sanitisation locations throughout.
- Encourage F&B operators to provide and maintain own amenities within premises to provide the best customer experience.

COMMERCIAL

- Derive additional brand space income with large-format digital super screens. Ensure content is relevant to its audience with guidelines for brands.

LEASE CONDITIONS

Supermarket

- 10–20 yr lease gross rent (incl. outgoing/promo levy) + % rent (turnover)

F&B

- 5–7 yr lease gross rent (incl. outgoing/promo levy) + % rent (turnover)

Hero Pub

- 10–15 yr lease gross rent (incl. outgoing/promo levy) + % rent (turnover)

Speciality Retail

- 5–7 yr lease gross rent (incl. outgoing/promo levy) + % rent (turnover)

Pop-up

- 6–12 yr month fixed + % of sales

LEAD CONCEPT: VERTICAL RETAIL STACKS

DESCRIPTOR

Central Precinct must deliver a great ground plane experience, with destination appeal beyond good retail streets.

Vertical stacks of retail, either as stand-alone retail buildings or to-podium stacks, turn the height of the built form proposed into a unique characteristic through great retail offers that rise up off the ground. The stacks enable interesting architecture led by brands, create highly visual landmark retail spaces to orientate people within the precinct, and allow the clustering of like-minded retailers so that a building, street or even a precinct can be known for a particular type of shopping.

KEY MOVES

- Multiple (at least two) stand-alone stacks, ideally near the Metro station
- Higher than three levels of podium to enable vertical stacks in towers that have residential or commercial above
- Explore multi- and single-brand offers

Creating reasons for people to journey both vertically and horizontally.



Tokyo Plaza, Tokyo

VERTICAL RETAIL STACKS: EXPERIENCE BENCHMARKS

MULTI-BRAND OFFER TOKYU PLAZA, TOKYO

Located on the nexus of Tokyo's hyper-busy Harajuku and Omotesando precincts, Tokyu Plaza provides one of the city's most interesting vertical retail precincts, tying together fashion, interior design, beauty, food and beverage. While the retail offer is perfect for the market, what makes Tokyo Plaza work is its public realm experiences including a highly photographable fractal mirror entry and a landscaped rooftop garden that allows customers to unwind in one of the city's only down-tempo spots.



SINGLE BRAND OFFER SAMSUNG 837, NEW YORK CITY

Samsung 837 combines art, fashion, sport and technology in unprecedented ways. It's a place filled with ideas, experiences and Samsung's latest devices. Anyone can try out cutting-edge experiences, take part in interactive art installations or watch a larger-than-life, three-storey screen. It is a home for live music performances, exclusive screenings and podcast recordings. The space is a brand come to life in an entire building that features an amphitheatre area, AR studio, sound studio, customer service and experience area, and café.



LIFESTYLE STACK HYUNDAI CARD LIBRARY, SEOUL

Hyundai Credit Cards delivered a multi-storey retail building in Seoul that provides a reference tool (library) for all of the fantastic lifestyle experiences that could be enabled through their credit card platform. The building includes a book section, travel agent and cooking school, but what makes it fantastic is the use of height; from multi storey-high bookshelves to winding stairways it's a store that encourages exploration and lingering.

VERTICAL RETAIL STACKS: IMPLICATIONS

RETAIL MIX

- Multiple lifestyle brands and F&B in a single building
- Single brand buildings

DESIGN

- Design a collection of buildings with civic scale to bring about a feeling that you have arrived at a true town or neighbourhood centre with tiers of activity to explore.
- Use the buildings' scale to create multi-level, light-filled retail experiences at important corners or nodes that are highly visible and create street presence.
- Provide clear and considered vertical transport throughout that is easy to navigate and arrive at all levels.
- Create a sense of arrival at all entry points.
- Activate the building façades with night illumination.
- Include smart lifts for fast, accessible and inclusive design.
- Design for ease of access to shopper services on all levels (i.e. amenities, guest services, wayfinding, etc.).

OPERATIONS

- Design in contactless deliveries and pick-up points to ensure the retail is future-proofed for pandemic conditions and a digital consumer.
- Ensure operations and staff are able to maintain high standards of health and hygiene with additional amenities, cleaning, bussing and sanitisation locations throughout.
- Ensure retailers adopt new digital technologies to allow customers to order direct from tables, tablets and mobile phones as well as contactless checkouts.

COMMERCIAL

LEASE CONDITIONS

Speciality Retail

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

F&B

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

LEAD CONCEPT: WELLNESS & BEAUTY HUB

DESCRIPTOR

Wellness is a long-term ascendant lifestyle driver, as society moves away from the hyper-performance, self-optimising style of health and into softer, more cerebral and relaxing forms. With its residential population forecast to be working hard and earning high discretionary income, Central Precinct is well positioned to incorporate a wellbeing sub-precinct.

Removed from the energy and intensity of the Metro station, the Wellness Hub could be a specific building or be spread across a few streets, pathways and lanes, like a neighbourhood. Gathering hair and beauty, medical, massage, allied health, F&B, studio fitness and boutique lifestyle fitness brands will create an environment that is genuinely relaxing, healthy and coherently mixed, unlike what mall retail competition can provide.

KEY MOVES

- Identify location away from the action but not too far away
- Cluster wellness retail across the ground plane, in quieter sections
- Combine a true diversity of retail and services that help people feel better
- Design low-intensity, natural spaces

Central Precinct is well positioned to incorporate a wellbeing sub-precinct.



Murir, SEO

WELLNESS & BEAUTY HUB: EXPERIENCE BENCHMARKS

DISTRIBUTED WELLNESS JAMES STREET, BRISBANE

Amongst a broad retail offer spanning grocery to luxury, James Street includes athleisure wear, beauty and yoga – but rather than gathered in one building, the offer is dispersed across buildings and lane ways, creating an ant-trail for health-conscious shoppers. This decentralised approach works because James Street is such an enjoyable place to walk, with shaded pavements and great low-scale architecture. This spread-out approach could also work for Central Precinct.

NEO-MEDICAL RETAIL EKH CHILDREN'S HOSPITAL, BANGKOK

Neo-medical retail is a fast-growing industry sector incorporating Allied Health, cosmetics and other products or services that require clinicians and sterility. As the beauty industry booms and the population becomes more Asian, this broad sub-category of wellness retail is expected to expand, providing an opportunity for the Central Precinct to house a critical mass of practices in the Wellness & Beauty Hub.



HYBRID HEALTH PARAMOUNT RECREATION CLUB, SYDNEY

Paramount Recreation Club in Surry Hills provides its members and general public drop-ins with an experience to improve their physical, mental and social health. Across three different rooms and a rooftop terrace, the club provides active and passive fitness classes, meditation, nutrition, a café and regular social events. It's a busy club, but still a low-intensity use for a rooftop in a dense residential neighbourhood. This means it has become a kind of wellbeing oasis for the surrounding population and it avoids significant issues with compromising residential amenity through disruptive uses.

WELLNESS & BEAUTY HUB: IMPLICATIONS

RETAIL MIX

- Beauty services – laser, treatments, hair salon, barber
- Beauty retail (preferably organic)
- Boutique multi-modal gym - spin, boxing, group and personal training
- Yoga, reformer pilates, barre, mediation studio
- Boutique athleisure fashion
- Healthy food café's with boutique coffee and organic wine
- Healthy juice bar
- Sushi bar
- Health food, naturopath, vitamins and supplements store
- Sports chiro and physio
- Recovery – float, infra-red sauna, massage etc.

DESIGN

- Using a rustic simplicity or less is more approach to create space in the mind and an oasis and escape from the frenetic pace of urban life.
- Bring the outside in with open aired designs filled with plants and natural light.
- A restrained natural palette with minimal materials and clean simple details will create a sense of calm and slower pace.
- Careful attention to unusual planting, landscaping, lighting and sound to create a domestic warmth and scale to the streetscape and interiors.
- The use of colour should be restrained and kept to neutral natural tones, whites or light colours. This is to reflect the natural organic environment and bring one closer to nature.

OPERATIONS

- Create a frictionless convenient tailored experience, where technology is used throughout the physical and digital journey, to connect with the audience 24/7 and allow seamless services, bookings and promotions to happen with ease.
- Design in contactless deliveries and pick up points to ensure the retail is future proofed for pandemic conditions and a digital consumer.
- Ensure operations and staff are able to maintain high standards of health and hygiene with additional amenities, cleaning, bussing and sanitization locations throughout.
- Ensure retailers adopt new digital technologies to allow customers to order direct from tables, tablets and mobile phones as well as contactless checkouts.
- Encourage F&B operators to provide and maintain own amenities within premises to provide the best customer experience.

COMMERCIAL

- Consider incremental income opportunities from hosting bookable events that enhance the wellbeing message.

LEASE CONDITIONS

Speciality Retail

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

F&B

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

Small Gym

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

LEAD CONCEPT: THE ABATTOIR GREEN

DESCRIPTOR

The former Abattoir buildings and their surrounding lush gardens are one of the most precious parts of SOP. The heritage overlays on the site will protect its unique identity and provide a low-intensity alternative to the human and architectural density elsewhere in SOP.

Combining family-friendly F&B with key community services and informal meeting places will position the Abattoir Green as a community heart with intimate, social and hyper-local retail experiences. Well-suited to light-hearted social interactions, it needs to be moderately lively from morning to evening, with retailers that can trade well at different times of the day.

KEY MOVES

- Light-touch, practical redesign of heritage buildings
- Create multiple tenancies
- Link F&B retail space with gardens
- Make gardens practical for short-term uses such as markets

The Abattoirs and their lush gardens are one of the most precious parts of SOP.



The Sir George, Jugiong

THE ABATTOIR GREEN: EXPERIENCE BENCHMARKS

INDOOR OUTDOOR ROCHELLE CANTEEN, LONDON

Rochelle Canteen is a place only locals know – a relief from the weekend crowds that maraud the High Street. There’s no fanfare on the outside of the award-winning café and on the inside there is a down-to-earth menu, fitout and garden. Abattoir Green could learn from how Rochelle Canteen has become beloved by locals rather than visitors. The design plays a part, but more than anything it is the owner, who is local and amazing at what she does, that keeps the neighbours happy.



HERITAGE UPCYCLED THE SIR GEORGE, JUGIONG

Jugiong is in the middle of nowhere... at least by retail standards. But despite the geographic disadvantage, it has become a regional tourism mecca for NSW and the ACT. Its retail relevance is almost single-handedly attributable to The Sir George – a tenaciously renovated old pub which now includes a traditional bar, outdoor café, indoor restaurant, lifestyle and fashion retail, small-scale accommodation, a bottle shop and ice-creamery. The old buildings have been largely preserved, the new buildings are relatable and the mix of retail offer provides something for everyone.

PRODUCT SELECTION THE GROUNDS OF ALEXANDRIA, SYDNEY

Until recently The Grounds of Alexandria was Australia’s highest grossing café, reportedly trading over \$1 million per week. It’s important to acknowledge the clever range of experiences and products available. By doing coffee and cocktails well, The Grounds can bookend a day with its strongest and most profitable products.



THE ABATTOIR GREEN: IMPLICATIONS

RETAIL MIX

- Healthy all-day cafés and food
- Bakery desserts with boutique coffee
- Organic wine bar with farm-to-plate menu
- Bike repair workshop
- Plant and garden shop
- Pet grooming and supplies
- Weekly pop-ups
- Community space

DESIGN

- Protect and preserve the heritage buildings, but use the landscape and spaces between to adapt for retail and community space needs.
- Create open-air spaces that accommodate for all-year weather conditions with careful selection of outdoor seating zones.
- Highlight the heritage but focus on a loose fit to enable maximum flexibility in the future and for day-to-day operations to happen with ease.
- Brand the precinct to position it as a community hub, connecting people with the past, nature and each other.
- Ensure the gardens are easily accessible to non-paying customers.

OPERATIONS

- Design in contactless deliveries and pick-up points to ensure the retail is future-proofed for pandemic conditions and a digital consumer.
- Ensure operations and staff are able to maintain high standards of health and hygiene with additional amenities, cleaning, bussing and sanitisation locations throughout.
- Ensure retailers adopt new digital technologies to allow customers to order direct from tables, tablets and mobile phones as well as contactless checkouts.
- Encourage F&B operators to provide and maintain own amenities within premises to provide the best customer experience.

COMMERCIAL

LEASE CONDITIONS

F&B

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

Speciality Retail

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)
- Leave space for a small amount of community services that co-exist with retail

Community Uses

- Rent free

STADIA PRECINCT

SCALABLE STORES
PERFORMANCE FITNESS CLUSTER
STADIA RETAIL LANDMARK

STADIA PRECINCT OVERVIEW

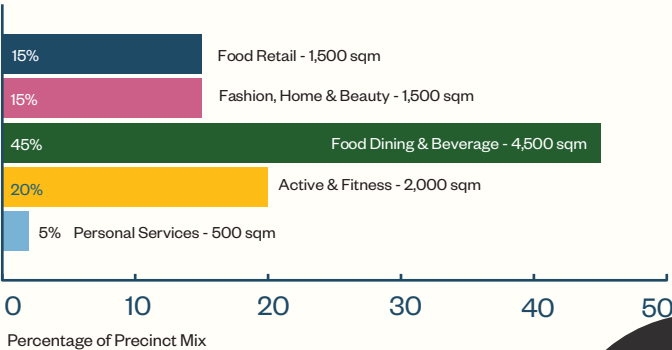
Expands its appeal as an event destination, giving it a competitive advantage in attracting both performers and spectators.

The Stadia Precinct will always be the home to great large-scale performances, but as SOP evolves into a more balanced precinct the responsibility for providing a spectacle must also be shared by the retailers.

Augmenting the core function of the stadia with retail that is exciting to experience and enjoyable to watch is the most appropriate response for the Stadia Precinct and expands its appeal as an event destination, giving it a competitive advantage in attracting both performers and spectators.

Through a carefully selected composite of fitness, F&B, merchandise and temporary retail, the Stadia Precinct will provide new experiential layers around the big event but will also attract non-event customers on every day of the week, making it a place of greater relevance and resonance within SOP.

RETAIL MIX



AUDIENCE HIERARCHY

- Visitor
- Resident
- Other
- Worker

LEAD CONCEPTS

- Scalable Shops
- Performance Fitness Cluster
- Stadia Retail Landmark




PERFORMANCE RETAIL

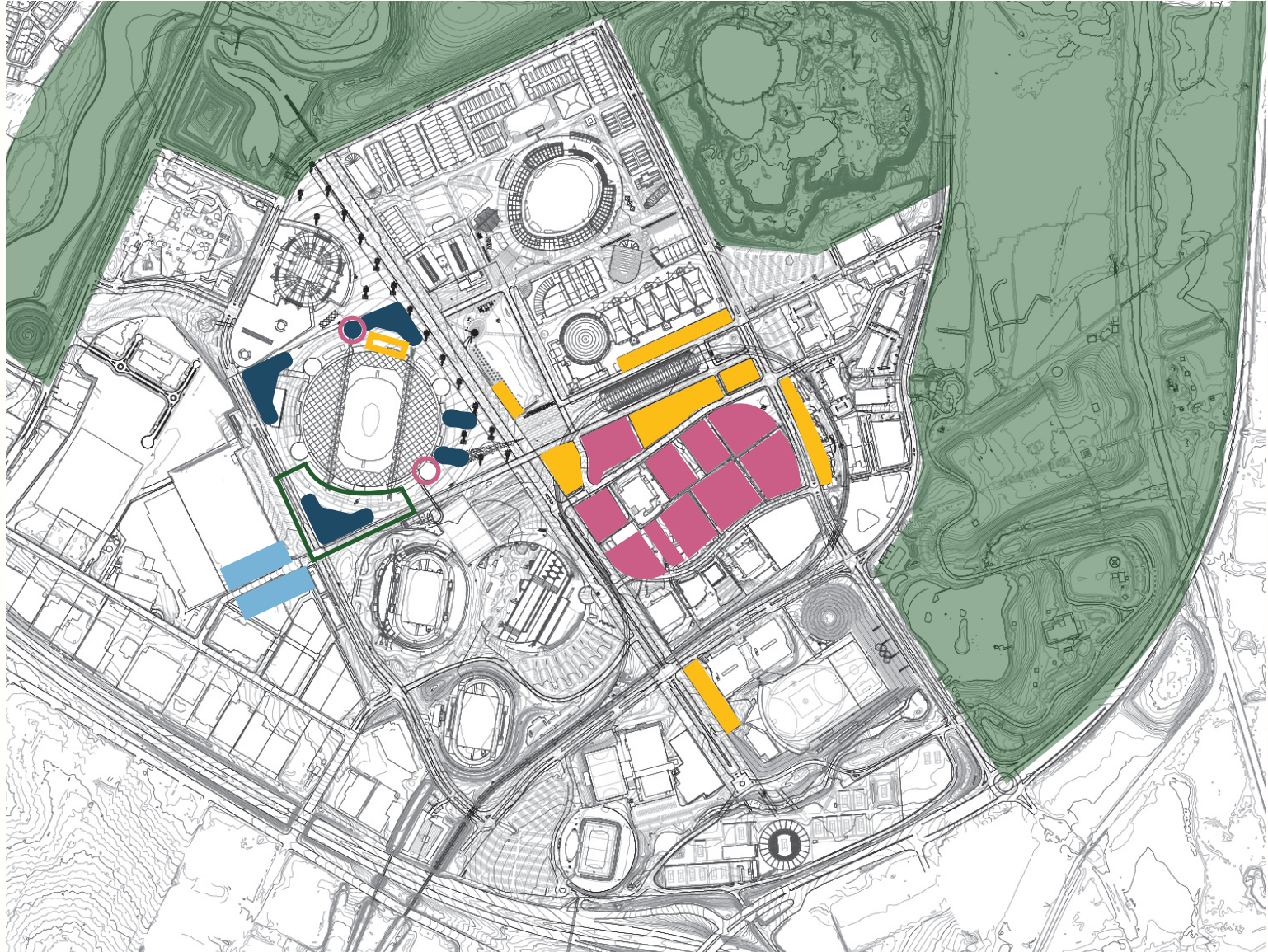
EXPERIENCE DRIVERS

- Spectacles
- Socialising
- Entertainment

STADIA PRECINCT INDICATIVE MASTERPLAN

POTENTIAL SITE FOR NEW BUILDINGS

- Potential Landmark Building 
- Scalable Anchor: Microbrewery 
- Performance Fitness Cluster 



STADIA PRECINCT MOODBOARD



Athletic excellence on display
FIFA Centre of Sporting Excellence, Istanbul



NIKE VirtuLabs Interactive Agency
New York, United State of America



Large-scale F&B
The Lighterman, London

Stadium voyeurism
Navy Yards, Washington



Big-event retail activation
Tokyo Dome, Tokyo



Building as a beacon
Barangaroo House, Sydney



Global brand display
AREA3, Johannesburg

LEAD CONCEPT: SCALABLE STORES

DESCRIPTOR

The addition of new built form around Stadium Australia creates an opportunity to address the Stadia Precinct's two-speed economy by spreading the retail more evenly across both time and space.

Scalable stores, which contemplate peaks and troughs in visitation, are viable in both busy and quiet times due to their product type, mix and retail design. A micro-brewery with a café can serve many F&B customers on a game day but also ship product to take advantage both of crowds and SOP's connection to roadways and the western suburbs.

Another option is a hub and spoke café model, where a larger format café has access to external kiosks on busy days, maximising service points without the infrastructure that can often lie dormant.

KEY MOVES

- An anchor micro-brewery
- White label retail space for one-off brand activations and merchandise
- User-friendly public realm designed for temporary retail activation
- Natural-feeling F&B tenancies to connect with the green public realm

Scalable stores are viable in both busy and quiet times.



Boatbuilders Yard, Melbourne

SCALABLE STORES: EXPERIENCE BENCHMARKS

STADIA MANUFACTORY BLUEJACKET BREWERY, WASHINGTON DC



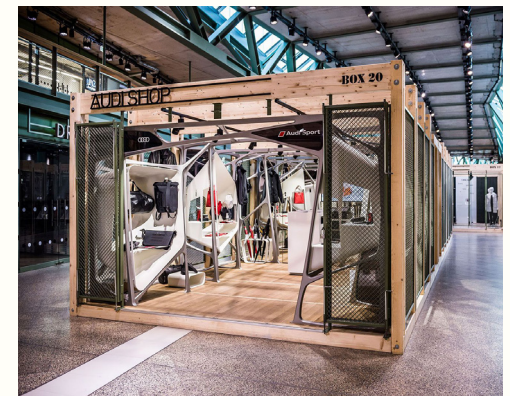
Located adjacent to Nationals Stadium in DC, Bluejacket Brewery has over 550 sqm of pure craft beer production, two large barrel rooms and a 200 sit-down restaurant and stand-up bar that buzzes when the Cardinals play home games. With a distribution footprint that covers the USA from coast to coast and underpins the business, the hospitality offer on-site can afford to have quieter days. That's not to say the business owners sit on their hands outside of game days; the business's private dining, functions and craft beer tourism make it busy every day of the year.



FLEXIBLE F&B THE BOATBUILDERS YARD, MELBOURNE



Located next to Melbourne's Convention Centre and within walking distance from Etihad Stadium, The Boatbuilders Yard effortlessly accommodates wildly varying patron numbers from day to night. The venue, essentially a pub with decent food, is licensed for 1,800 people, making it a focal point for crowds before and after games at the stadium. Its casual, family-friendly design and layout creates a feeling of safety and comfort without looking like it is anticipating unruly crowds – the result: next to zero patron issues and a beautiful venue which is now a place icon.



WHITE LABEL RETAIL SPACE ↑ BIKINI, BERLIN

Berlin's coolest shopping mall knows that nothing really lasts in fashion. Rather than commit to large, expensive, formal tenancies it has a modular system of micro-tenancies which allow brands to occupy and look good for small periods of time... sometimes just a few hours. This has allowed Bikini to host brands ranging from established operators like Audi to start-up fashion brands. The moving program keeps people coming back and the design provides a clue to SOP on how to be flexible and intentional with pop-up retail.

SCALABLE STORES: IMPLICATIONS

RETAIL MIX

- Allow 500 sqm plus for a genuine micro-brewery with production and dining
- Studios and showrooms with commercial offices
- Food factory retail and dining concepts
- Experiential pop-ups

DESIGN

- Create a raw and industrial aesthetic by using architectural forms akin to warehouses while exposing the structure as well as the mechanical, electrical and hydraulic services.
- Expose the inner workings of retail production and operations to create theatre, allowing the retailer to hero the product and tell their story in an authentic setting. Less is more when it come to interior finishes.
- Retailers should be encouraged to create unique and fun dining and educational experiences by including tasting rooms, makers spaces, classes and workshops centralised within production rooms surrounded by the inner workings of a retail factory.

OPERATIONS

- Promote corporate and private venue event hire to increase turnover during off-peak times.
- Design in contactless deliveries and pick-up points to ensure the retail is future-proofed for pandemic conditions and a digital consumer.
- Ensure operations and staff are able to maintain high standards of health and hygiene with additional amenities, cleaning, bussing and sanitisation locations throughout.
- Ensure retailers adopt new digital technologies to allow customers to order direct from tables, tablets and mobile phones as well as contactless checkouts.
- Encourage F&B operators to provide and maintain own amenities within premises to provide the best customer experience.

COMMERCIAL

LEASE CONDITIONS

Large Brewery/Production

- 10–15 yr lease gross rent (incl. outgoings/promo levy) + % rent (turnover)

F&B

- 5–7 yr lease gross rent (incl. outgoings/promo levy) + % rent (turnover)

LEAD CONCEPT: PERFORMANCE FITNESS CLUSTER

DESCRIPTOR

The business of fitness includes myriad businesses, institutions and services at the performance end of the market: professional and everyday athletes in high-spec gyms, sports medicine, sports education, sport performance retail, sponsorship brand activations, wearable technology brands and nutrition stores. Importantly, performance fitness runs seven days a week, morning until late.

Clustering performance fitness retail in a dedicated area of the Stadia Precinct creates a place for sport performance and an experience for those who watch rather than perform – a way to spend time before, during and perhaps post-game without having to enter a high-intensity social environment.

KEY MOVES

- Identify one corner of the Stadia Precinct as the focal point for a hub
- Integrate industry, education, exercise and retail
- Approach a highly recognised retail brand to create a signature tenancy

A focal point for a hub with integrated industry, education, exercise and retail.



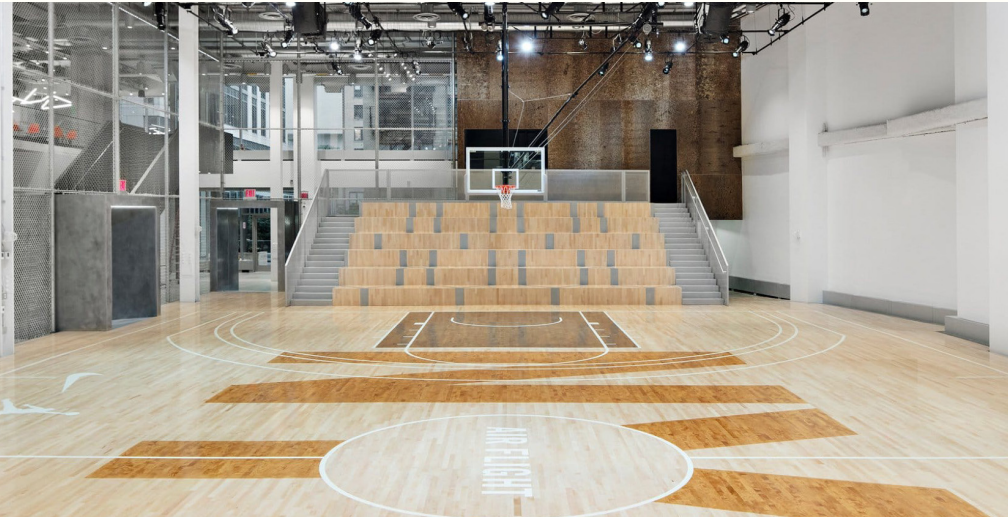
Nike, United States of America

PERFORMANCE
FITNESS CLUSTER:
EXPERIENCE
BENCHMARKS

SPORT BRAND ANCHOR
NIKE HQ, NEW YORK CITY



Nike head office in New York City is primarily a workplace, secondarily a demonstration space and thirdly a retail place. At street level it's for customers, but up above a custom-built basketball court and theatrette hosts talks and pro demonstrations; above that the Nike marketing staff do their work.



INTEGRATED EDUCATION
FIFA CENTRE OF MEDICAL
EXCELLENCE, ISTANBUL



FIFA chose the 4,500 sqm Acibadem Fulya Sportsmen Health Center in Istanbul as the "FIFA Medical Center of Excellence". The certificate was awarded by the FIFA Medical and Research Center, established in 1994, to protect the health of football players and minimise risks for injuries. The centre integrates performance training with health and medical services, catering to a professional and amateur audience.



PERFORMANCE FITNESS CLUSTER: IMPLICATIONS

RETAIL MIX

- Fully equipped 24hr gym
- Mid-scale group training gym
- Mid-scale boxing, cycle studio
- Global and local well-known athleisure brands
- Allied health services: physio, chiro, osteo, podiatry, occupational therapy
- Healthy food café or juice bar
- Health food, naturopath, vitamins and supplements store

DESIGN

- Create a raw and industrial aesthetic by using architectural forms akin to warehouses while exposing the structure as well as the mechanical, electrical and hydraulic services.
- Expose the inner workings of retail production and operations to create theatre, allowing the retailer to hero the product and tell their story in an authentic setting. Less is more when it come to interior finishes.

OPERATIONS

- Design in contactless deliveries and pick-up points to ensure the retail is future-proofed for pandemic conditions and a digital consumer.
- Ensure operations and staff are able to maintain high standards of health and hygiene with additional amenities, cleaning, bussing and sanitisation locations throughout.
- Ensure retailers adopt new digital technologies to allow customers to order direct from tables, tablets and mobile phones as well as contactless checkouts.
- Encourage F&B operators to provide and maintain own amenities within premises to provide the best customer experience.

COMMERCIAL

LEASE CONDITIONS

Commercial/Office

- 3–5 yr lease gross rent (incl. outgoings)
- Speciality Retail
- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

Large Gym

- 10–15 yr lease gross rent (incl. outgoings/promo levy) + % rent (turnover)

Small Gym

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

LEAD CONCEPT: STADIA RETAIL LANDMARK

DESCRIPTOR

A large format and highly visible retail building on the north east corner of the Stadia Precinct will help signal the zone's retail activity and draw crowds in from the Central Precinct. F&B will best serve this building, and it will require an operator who can cope with dramatic increases and drops in patronage between event and non-event days.

Exceptional retail experience at this physical location starts the Stadia Precinct experience before the turn-style, providing a place to wait, meet and socialise. However, if well-designed and executed the building is equally capable of drawing across non-event day audiences from the Central Precinct making it a buzzing everyday place and putting the Stadia Precinct on the retail map.

KEY MOVES

- A dramatic architectural statement
- A big-name operator
- A fluid and open ground plane so that customers can easily pass on deeper into the Stadia Precinct

A dramatic architectural statement, creating a warm welcome to the precinct.



Barangaroo House, Collins and Turner, Sydney

CONCEPT
MOODBOARD



Casual inspiration
Serpentine Pavilion by Elliason, London



Spill over retail
Barangaroo, Sydney



Conversational design elements
Serpentine Pavilion by Hadid, London



Activated squares
The Lighterman, London



Tiered levels of engagement
Barangaroo, Sydney



Design encouraging lounging
Oslo Opera House, Norway



Multipurpose design
1111 Lincoln Road by Herzog de Mueron, Miami

STADIA RETAIL LANDMARK: IMPLICATIONS

RETAIL MIX

- 1,500 SQM plus of F&B
- An established microbrewer with a strong food offer will ensure the viability of the business on quieter days
- Alternatively, an operator with credentials at scale (Matt Moran who runs the Sydney Opera Bar, Dave Sharpy who runs Melbourne's Boatbuilders Yard)
- Multiple products positioned within the building to serve a broad audience (ie. Rooftop bar, Level 2 dining, Level 1 café)

DESIGN

- A high-impact statement building
- Patrons inside to be made visible to the outside so it becomes a kind of living billboard for Stadia Precinct
- At least two clear entries/faces to that it is attractive to people entering or leaving ANZ Stadium
- Form follows flow – the building must be able to process large volumes of people with a minimum of friction

OPERATIONS

- Vertical transit that can deal with high customer volumes is essential
- Clear tenancy boundaries will aide security

COMMERCIAL

LEASE CONDITIONS

F&B

- 5–7 yr lease gross rent (incl. outgoings/ promo levy) + % rent (turnover)

ADDITIONAL CONSIDERATIONS

PRE-EXISTING SPACE

A number of immediate tactical interventions could help energise the current offer and grow 'green shoots' in underutilised spaces.

OVERVIEW

While it is nice to envision a great future, it is also important to remember that today's Sydney Olympic Park is not without retail – 13,000 SQM to be precise. These current operators were already exposed to the difficulties presented by a two-speed retail economy before Covid-19 hit and made survival even harder. As new retail comes into the precinct it will be equally important to support and nurture the early-movers who have already set up shop at Sydney Olympic Park.



Paramount Coffee Project, Sydney

SHORT-TERM SMALL IDEA: FINE GRAIN INTERVENTIONS

OVERVIEW

The current retail offer at Sydney Olympic Park lacks density and diversity. A number of immediate tactical interventions could help bring new retail operators, product and experiences into the precinct in the short-term, helping energise the current offer.

KEY MOVES

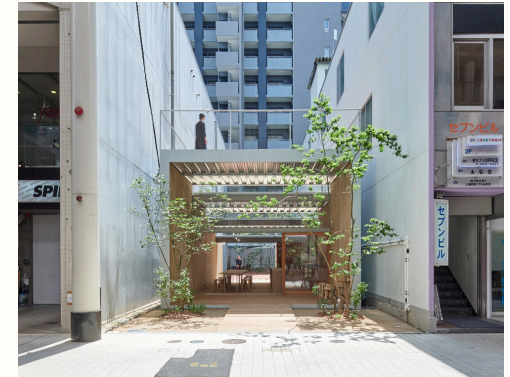
- Under-utilised space audit to pin-point opportunities for fine-grain retail. The audit should include vacant retail tenancies, under-utilised space on The Abattoir Green and any other small areas that can be creatively adapted to suit a retail offer.
- The opportunity to activate the fine-grain spaces should be offered to current SOP retailers as a second shop, alongside new retailers.
- The commercial model for the fine-grain spaces should maximise financial upside and flexibility for the retailer.
- Turn-over rent model capped at market rate (10%):
 1. Low-to-no base financial commitment
 2. Month-by-month tenancies
 3. Low-to-no exit fees beyond make-good on tenancies



Pocket tenancies
Alex Coffee, London



Intimacy created by 'village-ness
Loncafe Stand Nakameguro, Tokyo



Retail in the cracks ,
Omoken Park Event Space, Japan



Cabin inspired bar and kitchen
Pink Moon Saloon, Adelaide

LONG-TERM BIG IDEA: STATION UPCYCLE

OVERVIEW

The new Metro station will open in approximately ten years, and completely change the way that people travel to Sydney Olympic Park. As a consequence, the current train station may present alternative opportunities for larger retail and commercial space activation. Station F in Paris provides a brilliant example of this kind of re-purposing: what was a former rail freight depot is now Europe's most successful start-up hub with exceptional retail across F&B, lifestyle, health and wellbeing.

KEY MOVES

- Forecast space surplus for current station
- Develop adjunct commercial, entertainment and retail opportunities for the surplus space
- Adapt as public transport usage patterns shift

The upcycling of defunct train stations around the world has created some of the better-known placemaking success stories.



Station F, Paris

SUSTAINABILITY

RETAIL SUSTAINABILITY

SOPA's intent is to align retail firmly with the precinct's ambitious sustainability objectives that are primarily set out in the SOP Master Plan 2030 and the Environmental Guidelines for Sydney Olympic Park. As a highly visible and participative experience for almost every person who comes Sydney Olympic Park, retail has the capacity to communicate and manifest sustainability efforts and engage customers in practices that are better for planet, place and people.

Working back from a definition of sustainability that incorporates environmental, social, cultural and economic objectives, SOPA is investigating a broad range of ways in which it can support and incentivise more sustainable practices. The initiatives attempt to address the full value chain including manufacture and supply, development partners, individual retailers, their staff and customers.



Burwood Brickworks, Melbourne

SUSTAINABILITY

PRODUCT

- The inclusion of social benefit retailers (including First Nations enterprises) within the mix is highly desirable. SOPA will prioritise this category of retail within The Abattoir Green and assist the Central Precinct development partners to identify and incorporate this important component of a genuine local economy
- The emphasis on family-friendly food and beverage retail across Sydney Olympic Park is an intentional tactic to promote social sustainability. SOPA will continue to focus on delivering and supporting the creation of safe social environments at scale
- An emerging farmer's market proposition for the Sydney Showground will be fully explored as a commitment to local produce and the agricultural economy of Sydney's food bowl

DESIGN

- Green buildings: all new buildings in Sydney Olympic Park will have a Green Star rating, so retailers taking out leases in these buildings will be well placed to deliver a sustainable retail offer
- Green fit-outs: SOPA is currently investigating the potential for Green Star fit-out targets and a goal of all retail receiving that accreditation. Such an undertaking will drive environmental and financial performance within the shop

OPERATIONS

- Waste reduction is a key objective for SOPA who are seeking waste diversion from landfill by 80%. Food organics present an particularly acute problem and SOPA is currently investigating the ways and means for it to assist retail align with this important project outcome
- Procurement and supplies. Ideally the retail offer at Sydney Olympic Park will be subject to a no single use plastic mandate, assisting SOPA's intent to become a 'plastic free park'
- Travel Plans: will be developed to ensure staff have access to great public transport to limit private vehicle use. Public transport information and access for customers is also a key feature of the Sydney Olympic Park experience further driving down vehicular impact
- SOPA will explore a sustainable retailer award program to motivate vendors and communicate their good efforts with customers through social media

COMMERCE

- Green Leases will be provided both for retail and commercial office space to make sure the landlord stays committed to sustainability outcomes, assists with monitoring performance and provides upgrades when required
- SOPA are broadly encouraging businesses (including retailers) to give back to the community. SOPA intends to expand its current assistance with corporate volunteering opportunities and can connect new retailers to the precinct with local charities

APPENDIX

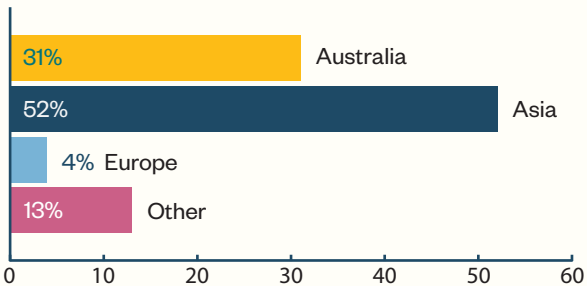
PEOPLE PROFILES

RESIDENTS DASHBOARD

FACTS AND FIGURES

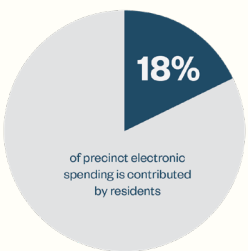
BIRTHPLACE

Residents are more likely to be born overseas



ENGAGEMENT

Limited engagement with precinct



Residents will increasingly become the most significant customer category.

PROFILES



YOUNG PROFESSIONALS



YOUNG FAMILIES



RETIREES

RESIDENTS YOUNG PROFESSIONALS

WE ARE:

Young, mainly Chinese and Korean professionals who work in the CBD or Parramatta

WE WANT:

To balance the best of Sydney's lifestyle with some Pan-Asian experiences

UNDERLYING FACTS

- SOP is ethnically diverse and young; in 2016 the ancestry of its 2000 residents was 25% Chinese, 11% Korean, 8% English, 6% Australian and 5% Indian, and the median age was 31 (Census 2016)
- 45% of SOP residents have Bachelor degrees or higher, nearly double the state and national averages (Census 2016)

FUTURE LIFESTYLE DRIVERS

- Contemporary Pan-Asian retail with a focus on F&B
- Retail that supports a longer body clock – from early morning to late at night
- Comprehensive technology provision
- A calm, clean and relaxed environment to live in
- Retail that can't be found anywhere else in the city
- Places to build community and develop attachments
- Health and wellbeing amenity

FUTURE EXPERIENCES



Aspirational health & wellbeing

Boutique fitness that meets or exceeds the standards in Sydney's eastern suburbs



Village-scale retail

Informal, approachable fringe retail that energises pedestrian links



Third spaces

Loosely programmed that provide opportunities for casual interaction, work and socialising

RESIDENTS YOUNG FAMILIES

WE ARE:

Parents with young kids who willingly live in apartments

WE WANT:

A safe and healthy place to raise our children

UNDERLYING FACTS

- SOP has a famous school holiday program, Kids in the Parks, and hundreds of events for children and families each year (SOPA 2020)
- 100% of housing in SOP is apartments, 67% of which are inhabited by family households (Census 2016)

FUTURE LIFESTYLE DRIVERS

- Retail that suits both parents and families
- A calm, clean, safe and relaxed environment to live in
- Big public spaces to compensate for the apartment living
- Childcare, child support and medical facilities
- High-quality options for a parents' night out away from the kids

FUTURE EXPERIENCES



Softened edges

Fringe and large format retail that spills into the public realm



Village square

Lifestyle retail that reflects a coastal or mediterranean climate



Social retail

Grocery and lifestyle retail that elevates the experience to the social dimension

RESIDENTS RETIREES

WE ARE:

Cashed-up downsizers looking for a relaxing place to live

WE WANT:

All the benefits of the city but none of the stress and noise

UNDERLYING FACTS

- In 2016, over-65s made up 2.1% of the SOPA population, comparatively low compared to the rest of Sydney with 13.9% (Census 2016)
- But this is changing quickly; Mirvac expects 20% of its new 1,460 build-to-rent apartments in SOP to be taken up by retirees (downsizing.com.au 2020)

FUTURE LIFESTYLE DRIVERS

- Room to relax and entertain
- A signature place for dinner which will impress visiting friends from the city
- A retail mix that has great breakfast, lunch and dinner
- Space to run and play with the grandchildren
- Easy access to art and culture
- Regular walks that include both nature and people

FUTURE EXPERIENCES



Passive entertainment

Casual retail fronting public squares and piazzas for people watching softened with greenery



Cultural retail

That encourages lingering and perusing



Sense of sanctuary

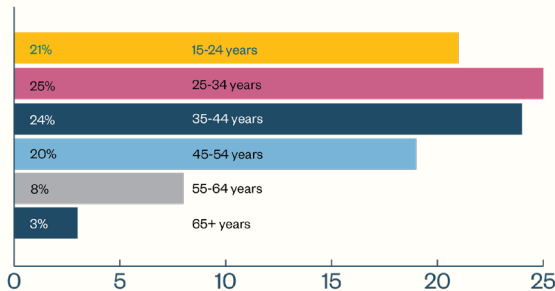
Low-energy areas to relax and dine

WORKERS DASHBOARD

FACTS AND FIGURES

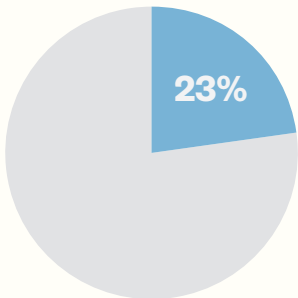
AGE

Workers are predominately young to middle aged adults



ENGAGEMENT

Local workers are particularly important in driving trade during weekdays during lunch-time leasing to an average contribution of 23% of spend



Workers will be a more and more active part of the daily life of Sydney Olympic Park.

PROFILES



OFFICE WORKERS



WORKERS

WORKERS

OFFICE WORKERS

WE ARE:

White collar workers in the knowledge and service industry who work in an office at Sydney Olympic Park

WE WANT:

Convenience, affordability and healthy spaces underpinning an enjoyable work life

UNDERLYING FACTS

- In 2018 there were just over 12,000 workers at SOP, excluding event day and casual workers (SOPA Annual Report 2017-18)
- Workers skew towards a younger and more affluent demographic with around 45% of workers aged 15-34 (Quantium)

FUTURE LIFESTYLE DRIVERS

- Wellbeing and fitness amenity that takes advantage of the parks and recreation opportunities at SOP
- Affordable but reliable food options for lunch
- Access to good coffee and morning breakfast options
- Places to unwind with a casual drink with colleagues after work
- Places to relax for lunch

FUTURE EXPERIENCES



Post-work entertainment

Some after-hours recreation and leisure options for mid-week escapism



Cheap and cheerful dinner options

Good coffee and quick food at the right moment



Activated edges

Restorative landscapes for lunch

WORKERS

EVENT AND RETAIL WORKERS

WE ARE:

Blue collar and casual employees who work events and in retail around Sydney Olympic Park

WE WANT:

To have meaningful employment without travelling too far

UNDERLYING FACTS

- There are around 5,000 casual workers in SOPA (SOPA Annual Report 2017-18)
- Details about this group are not captured in the current analyses of SOP but as the volume of retail grows they will become an increasingly important group to consider – both as workers and consumers

FUTURE LIFESTYLE DRIVERS

- Safe transport options to work and back home again
- Affordable 'grab and go' options and afterwork drinks
- Public places to relax and enjoy being part of the culture of SOP

FUTURE EXPERIENCES



After-work drinks

Accessible shopping opportunities for after work



Casual seating

Relaxed options to soak up the atmosphere and recharge



Low-key, high-quality coffee shop

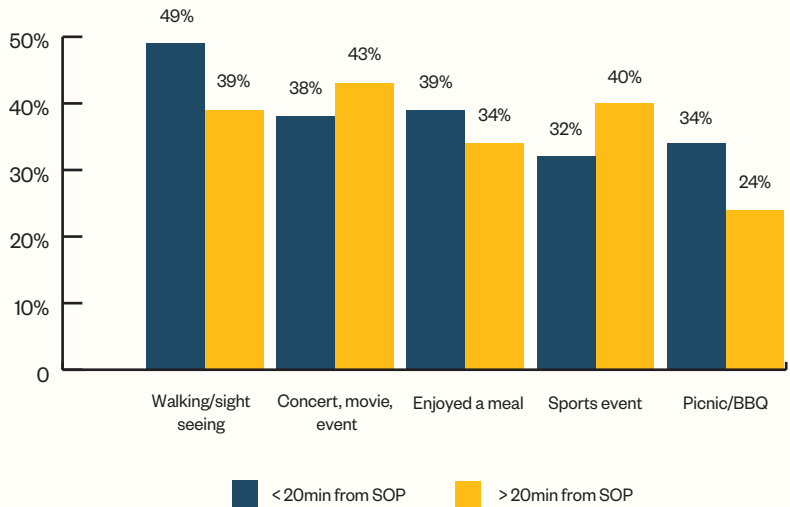
Places to relax and be part of the social fabric

VISITORS DASHBOARD

FACTS AND FIGURES

ACTIVITIES

Those who live near the precinct use the facilities more regularly, while those who live more than 20min from the precinct tend to have a more distant relationship with the precinct.



EY Sweeny 2020 report

Visitors are the glue that has long held SOP together; they are a critical part of its future success.

PROFILES



LOCAL EVENT-GOERS



LOCAL NON-EVENT-GOERS



OVERNIGHTERS

VISITORS LOCAL EVENT GOERS

WE ARE:

Fans who want to see our favourite team, artist or event

WE WANT:

World-class facilities that are easy to access, and places to go before and after the events we love

UNDERLYING FACTS

- SOP park has around 160 event days with major events; over 10 million people attend over 5,000 events each year (SOPA 2018)
- About 46% of annual electronic sales (pre-COVID) were generated on event days, with more than half of these generated after 5pm (Quantum)

FUTURE LIFESTYLE DRIVERS

- Relatable and casual Australian F&B
- Easy access to stadiums and arenas
- Public realm and retail spaces that provide a place to recharge when needed
- Safe and well-managed public spaces to enjoy
- Meaningful places to relax after events

FUTURE EXPERIENCES



Edgy bar or brewery

Scalable drinking areas that retain a sense of place



Open kitchen dining

Dining that provides a point of focus and respite among the chaos



Thrill of the game

High energy and low energy experiences should consider the user journey

VISITORS

LOCAL NON-EVENT GOERS

WE ARE:

Families and locals from nearby suburbs, and visitors exploring Sydney

WE WANT

To experience things that the city doesn't offer – retail, the Olympic story, unique landscapes and quiet parklands

UNDERLYING FACTS

- SOP has 2.7 million parkland visitors and over 1 million cyclist visits compared with 2 million paid car parking visits (SOPA annual report 2018–19)
- 18,860 school students participated in environmental excursions and education events within the parklands (SOPA annual report 2018–19)

FUTURE LIFESTYLE DRIVERS

- Good public amenities that support long, relaxed stays in the area
- A calm, clean, safe and relaxed environment to visit
- Recreational infrastructure such as shaded areas, BBQs and active transport
- High-quality and appropriately scaled retail in the park

FUTURE EXPERIENCES



Moments of pause

Soft interface with retail that harmonises with nature



Discovering

Outward facing events that encourage spontaneous engagement



Day and night markets

A reason to visit during the day or hang around at night

VISITORS OVERNIGHTERS

WE ARE:

Visitors staying the night, often from interstate, to see our favourite team and to explore Sydney from a central location

WE WANT:

To visit world-class venues and have easy access to the rest of Sydney's highlights while we're here

UNDERLYING FACTS

- Five hotels within SOP generate around 225,000 visitor nights annually, and this is expected to increase to over 400,000 by 2031 (HillPDA 2020)
- It is estimated that overnight guests spend on average \$100 per day, compared to \$60 for other visitors (HillPDA 2020)

FUTURE LIFESTYLE DRIVERS

- A diversity of accommodation and associated retail, from five-star to everyday options
- To visit a place that has its own culture
- To have special treatment beyond the normal visitor
- To use SOP as a base to explore both eastern and western Sydney

FUTURE EXPERIENCES



Green relief
Opportunities to engage with Sydney's splendour



Holiday indulgences
Remarkable hospitality and bluespaces



Iconic eateries
A taste of the best the region has to offer

OTHER STUDENTS

WE ARE:

Ranging from kindergarten to Year 12 participating in education programmes in sustainability, arts and sport

WE WANT:

To be in a place that makes it exciting to be a student

UNDERLYING FACTS

- There are currently 1,500 students studying at SOP, with a goal to increase this to 5,000 by 2030 (SOPA Annual Report 2018–19)
- Students at SOP predominantly attend the SP Jain School of Global Management, the Australian College of Physical Education and the new UNSW campus

FUTURE LIFESTYLE DRIVERS

- Places to become part of the community and history of SOP
- Retail that supports the needs and budgets of students
- Social F&B to meet other students, locals and visitors
- Integration with the rest of the city so that SOP doesn't feel like an island

FUTURE EXPERIENCES



Instagram worthy activities

Interactive elements that relevant sustainability, arts and sport



Kidsplay

Indoor activities for rainy days



Learning about food production

Veggie gardens and horticulture

OTHER ATHLETES

WE ARE:

Amateur and professional athletes with a passion for our sport

WE WANT:

A place with world-class facilities, supportive amenity and infrastructure to fuel our passion

UNDERLYING FACTS

- The modern form of SOP was created around the needs of athletes
- SOP hosts thousands of athletes each year for training and events supporting children, university, amateur and professional athletes of all ages and abilities

FUTURE LIFESTYLE DRIVERS

- Ongoing upgrades and improvements of existing facilities for athletes
- Lifestyle and retail options that align with functional training and competing needs
- Opportunity to introduce flagship athletic retail that supports elite sports
- Healthy and public lifestyle options

FUTURE EXPERIENCES



Big name concept stores
Flagship shoe and clothing retail



Aspirational health food
Healthy lifestyle retail



Social sport opportunities
Facilities that are integrated into public life

RETAIL MARKET INSIGHTS

RETAIL MARKET COMPETITOR SUMMARY

WESTFIELD PARRAMATTA & PARRAMATTA TOWN CENTRE



Supports a catchment area of over one million people - one of Australia's largest shopping centres with a diverse population.

- 120+ tenants
- GLA – 34,000 sqm
- ARS – \$227.3m
- 2413 car parks

DFO HOMEBUSH



Premium affordable shopping destination with a focus on fashion, located in North Ryde. Features Myer and David Jones and over 20 mini majors.

- 125 tenants
- GLA: 28,000 sqm
- ARS: \$285.3m
- 2045 car parks

Sydney Olympic Park sits within a highly competitive market area.

RYDE CITY SHOPPING CENTRE



Regional shopping centre redeveloped in 2010 and struggled, went into receivership in 2015 with recent success shifting away from fashion towards food.

- 84 tenants
- GLA: 24,000 sqm
- ARS: over \$200

WESTFIELD BURWOOD



Regional shopping centre located near Burwood shopping strip and Burwood train station - first opened in 1966.

- 150 tenants
- GLA: 33,000 sqm
- ARS: \$303m
- 1351 car parks

RETAIL MARKET COMPETITOR SUMMARY

RHODES WATERSIDE



OCO-located with large IKEA store, with a focus on dining, within a broader commercial and residential precinct owned by Mirvac.

- 120+ tenants
- GLA – 34,000 sqm
- ARS – \$227.3m
- 2413 car parks

DFO HOMEBUSH



Modern shopping centre with international name-brand outlets and a food court – opened in 2002 and refurbished 2014.

- 125 tenants
- GLA: 28,000 sqm
- ARS: \$285.3m
- 2045 car parks

ASHFIELD TOWN CENTRE



Important Inner-West shopping strip along Liverpool Road near the train station – encompasses offices, street level shops and Ashfield Shopping Mall.

- 84 tenants
- GLA: 24,000 sqm
- ARS: over \$200

BIRKENHEAD POINT



Mirvac-owned, fashion-focused outlet centre with a marina and apartment complex – includes Aldi and Coles.

- 150 tenants
- GLA: 33,000 sqm
- ARS: \$303m
- 1351 car parks

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Right Angle Studio acknowledges the traditional owners of the land and pay our respects to the Elders past and present.

