



FLOUR MILL

Impact Report

How placemaking has improved The Flour Mill Summer Hill



Flour Mill View
from Greenway

Comparing three independent place audits:
August 2025 · February 2026 · June 2026

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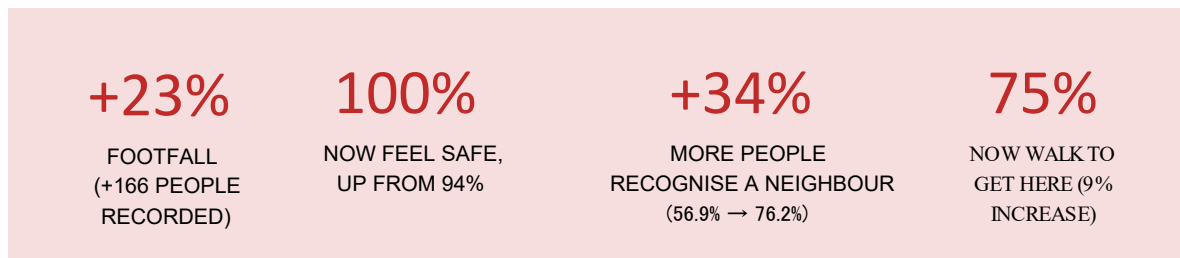
EXECUTIVE SUMMARY

A Growing Precinct

Over the past year, the courtyard and green spaces of **The Flour Mill of Summer Hill** have been the focus of a dedicated placemaking and marketing campaign, developed to strengthen ties between the precinct's local businesses, residents and visitors, and to establish this heritage site as a genuine community hub.

To understand what has actually changed, rather than relying on impressions alone, independent "place audits" were carried out at three points in time: **before the campaign began (August 2025), at its midpoint (February 2026), and after its first full year (June 2026)**. Trained observers spent full days (weekdays outside of school holidays, public holiday or special events) on site, counting visitors, recording how they used the space, and speaking with them directly about their experience. We note from observation and trade weekends are higher on all reported metrics.

The results point to a clear and consistent pattern: **more people are visiting, more people are staying, and more people feel a genuine sense of belonging in the precinct**. Over the same period, participating businesses reported a 45.7% rise in monthly revenue, evidence that a better-loved public space and a stronger local economy are moving together.



August 2026 - June 2026

METHODOLOGY

How We Measured It

This report is built on the same rigorous, independent methodology used in public space studies internationally, developed from the work of urban researcher Jan Gehl. On each audit day, trained place auditors spent the full day on site (7am–6pm) and recorded:

- **Movement** —how many people passed through the precinct, and how (walking, cycling, with a pram, and so on)
- **Time in Place** —how many people stopped to stay, for how long, and what they did while there
- **Interviews** —short conversations with visitors about how the space makes them feel, why they came, and what would improve it
- **Observations** —on-the-ground notes capturing detail that the numbers alone don't tell you
- **Digital campaign** — results from online marketing

Because the same method was applied consistently, the three audits can be compared directly, giving an evidence-based picture of change over time.

AUDIT	MILESTONE	TOTAL PEOPLE ON SITE
6 August 2025	Baseline —before the campaign	735
11 February 2026	Midpoint —six months in	973
1 June 2026	One year on —after the 12month "Uptown" program, activation strategy and Greenway opening	901

FINDING ONE:

A Busier Place, Every Day.

The clearest indicator of the campaign's impact is the most straightforward one: **more people are choosing to spend time here.**

On an average weekday, the number of people moving through the Flour Mill precinct climbed from 473 in August 2025 to 617 in June 2026, a rise of **30%.**

473 605 617

PEOPLE MOVING THROUGH, PER DAY

+30%

GROWTH IN TRANSIENT TRAFFIC

INSIGHT

The growth has proven durable rather than seasonal.

February's peak of 973 people a day fell in the middle of a Sydney summer, while the June 2026 audit was conducted in winter — traditionally the quietest season for outdoor public life. Even so, June retained 93% of the February peak, and remained 23% above the original baseline.

A winter weekday at the Flour Mill now draws nearly as many people as the earlier baseline drew in its best conditions, suggesting the precinct's appeal is becoming a routine habit rather than a fair-weather one.

"2025 vs 2026 — definitely felt like more people around, more of a vibe. People overall seemed a lot more positive than last year."

— Place auditor observation, February 2026



Foot and cycle traffic through the plaza

How people arrive at and move through the precinct is a key measure of how accessible and well-used the space has become. The data shows the precinct is attracting a larger overall audience, and a growing share of that traffic is arriving on foot rather than by other means, reinforcing its role as a walkable, pedestrian-first destination rather than one people drive or cycle to.

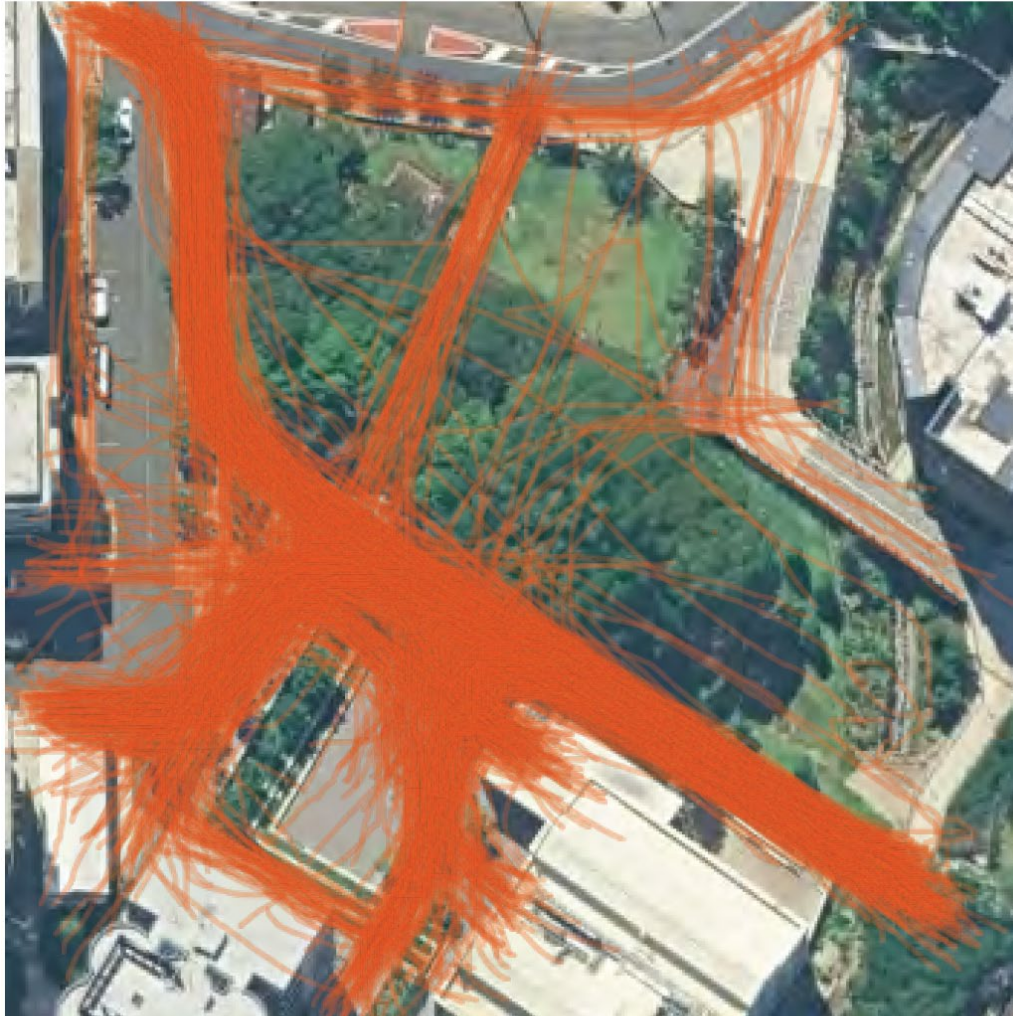
At the same time, growth in through-traffic has slightly outpaced growth in people stopping to dwell, meaning a marginally smaller share of visitors are lingering even as the raw number doing so continues to rise. That said, the number of people stopping in the Flour Mill precinct to sit, eat, play or simply relax rose from 262 to 284 a day, up 8.4%, with an even stronger midpoint reading of 368 in February 2026.

TRANSITIONS AND DWELL	AUG 2025	FEB 2026	JUN 2026	CHANGE (AUG ²⁵ JUN)
Foot traffic (total people on site per day)	735	973	901	+23%
People moving through the precinct (transiting)	473	605	617	+30%
People dwelling in the space (daily total)	262	368	284	+8.4%
Dwelling as a share of total people (dwell ÷ total)	35.6%	37.8%	31.5%	-4.1pts
Transiting as a share of total people	64.4%	62.2%	68.5%	+4.1%
Arrive on foot	437	536	585	+2.6%
Arrive by bike	25	44	20	-39.6%
Arrive by other means (wheelchair, mobility scooter, pram, skateboard)	11	25	12	-17.4%

Notes on the data: figures reflect aggregated Movement and Time in Place data from each weekday audit. Percentage-point ("pts") changes are used for survey-based measures reported as percentages. Transport data derived from 'tracked movement modes (not the interviews). The reduction in visits to local shops/cafes expressed as a percentage, is offset by an increase in total number. Businesses have self-reported revenue increase.

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Patterns of movement



Mode

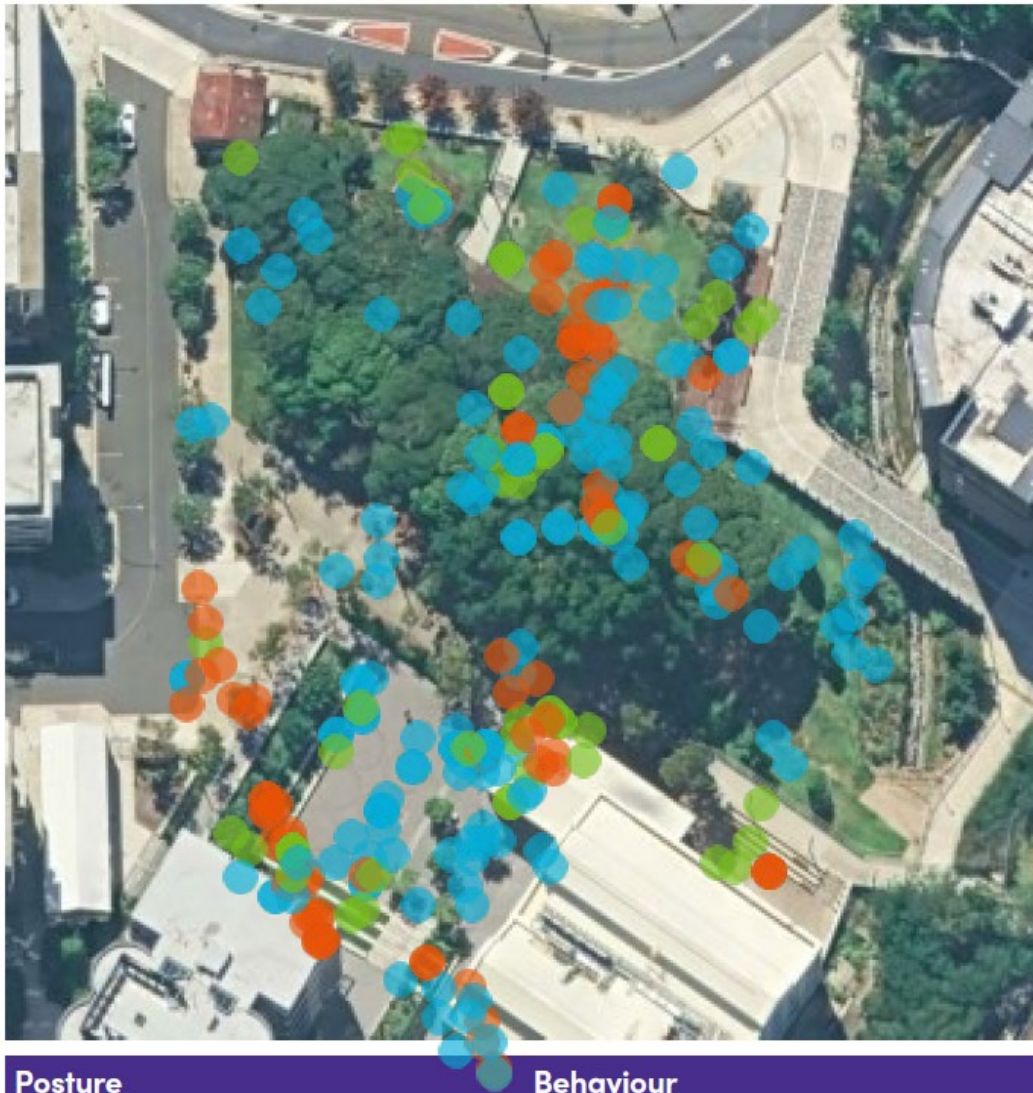


Visual representation of the movement patterns through the Precinct in February 2026.

Unwind FLOUR MILL winds

Activation of place

● < 10 mins
 ● 10-20 mins
 ● 20-30 mins



Posture



Behaviour



Visual representation of the dwell locations and activities across the Precinct in February 2026.

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"Love this space, it is beautiful and relaxed."

— Visitor, August 2025

" Friendly people and good community here."

— Visitor, August 2025

"Really really really love the Little Big House... I love [it] because it's got more of a community feeling, like Turkish culture. [My] sister lives here and has a new baby, some other family in the area, moved here four years ago, so {we} associates the area with safety and belonging."

— Visitor, February 2026

Across every audit, the community activities are mentioned unprompted as the emotional centre of the precinct, a strong signal that the campaign's brand identity is resonating with the people who use the space every day.



Passive use of outdoor space at the Flour Mill

FINDING TWO

A Safer, More Familiar Place

Two of the most meaningful shifts in this report concern not how many people came, but how those people felt once they arrived. **Every visitor interviewed in the June 2026 audit reported feeling safe in the space**, up from 94.1% at baseline.

The number of visitors who said they recognised someone else in the precinct rose **from 56.9% to 76.2%**, a gain of more than 19 percentage points. It dipped to 46.9% at the February midpoint, most likely as the newly opened Greenway drew in a wave of first-time visitors; by June, the community had evidently grown into that larger footprint.

100%

FEEL SAFE
JUNE 2026

76.2%

RECOGNISE
SOMEONE
HERE

"I love how safe it feels here with such a great community.."

—Visitor, June 2026

This is precisely the social outcome the campaign set out to achieve: a precinct that not only looks better, but feels like somewhere people belong.



Sense of safety and familiarity are strong indicators of a well-functioning public space. The data shows a clear positive shift across all three measures between the first and most recent audits: more people feel safe in the space, more people recognise others when they're there, and more people are striking up conversations with someone new. Together, these trends suggest the precinct is becoming not just safer, but more socially connected over time, with rising familiarity and conversation reinforcing the sense of safety, rather than moving independently of it.

It is worth knowing these results build off an already strong and positive base.

SENSE OF SAFETY AND FAMILIARITY				
Spoken to someone new in the Precinct (Conversation)	38.8%	41.9%	47.6%	+8.8pts
Feel safe in the space	94.1%	100%	100%	+5.9pts
Recognise someone else here	56.9%	46.9%	76.2%	+19.3pts

When patrons were asked how the space makes them feel, visitors gave a consistently positive, answer across all three audits:



FINDING THREE

Getting Here is Getting Easier

Walking remains, and has become even more so, the way locals get to the Flour Mill. The share of visitors arriving on foot rose from **68.6% to 75%**, while car arrivals fell from 19.6% to 15%.

The new Greenway connection has clearly marked a turning point for the precinct's sense of connectivity. At the February midpoint, light rail and Greenwaylinked arrivals spiked to 18.2% of all visitors, as locals discovered the newly opened link for the first time:

"The greenway opening has really opened up the suburb for us."

—Visitor observation, February 2026

"Now that I know that it's here, I'll definitely be back. Water for humans and dogs needed. Signage from Greenway needed."

—Visitor, February 2026

One area worth continued attention: the number of cyclists crossing the precinct rose sharply to 44 individual bikes on the day of the audit in February (midpoint of the program) before easing back to 20 individual bikes by June, still below the August 2025 baseline of 25. Feedback across all three audits has consistently called for better cycling infrastructure and clearer wayfinding, both practical opportunities to build on the Greenway's early momentum.



Cyclist and pedestrians accessing the Flour Mill

FINDING FOUR

Local Business the Heart of the Precinct

Business patronage at Flour Mill Precinct has held broadly steady across the audit period. Within that overall pattern, the mix has shifted: daily patronage rose noticeably (23.5% to 38.1%), while weekly patronage fell by a similar margin (58.8% to 38.1%), suggesting a smaller but more habitual core of regular visitors rather than a broader casual base. Encouragingly, the share who never visit local businesses in the precinct nearly halved, from 7.8% to 4.8% indicating increase loyalty in the area.

Qualitative feedback across all three audits tells a consistent story that hasn't shifted with the visitation numbers: strong, repeated loyalty to Headland Coffee and The Granary, and an ongoing call for more variety, affordability and later trading hours. That consistency across three separate audits, spanning almost a year, suggests these are structural gaps in the offering rather than one-off suggestions.

BUSINESS PATRONAGE				
Daily	23.5%	33.3%	38.1%	+62.1%
Weekly	58.8%	33.3%	38.1%	-35.2%
Fortnightly or less frequently (Fortnightly + Monthly + Annually)	9.9%	18.2%	14.3%	+44.4%
First time	N/A	N/A	4.8%	-
Never	7.8%	66.6%	76.2%	-38.5%

A core aim of the campaign was to strengthen collaboration between the Flour Mill's local businesses, and the community's feedback suggests this is taking hold. **Headland Coffee** and **The Granary** are named, unprompted, as neighbourhood favourites in every audit, and the precinct's markets and community programming are consistently cited as reasons to return.

"Headlands has the best coffee in Sydney. Lunch from Egyptian. Attended community events in Little Big House. Love H&F."

—Visitor, June 2026

The proportion of visitors frequenting local shops and cafes weekly or more has remained high throughout — **82.3% in August 2025 and 76.2% in June 2026** — a strong, sustained pattern of local patronage as the precinct's retail and hospitality mix has continued to develop despite the current economic landscape*.

The Greenway connection, in particular, is prompting visitors to think about the precinct's commercial future, not just its present:

"Location on Greenway is brilliant, let's make something of it with more retail and cafes and options. Great for the locals as well."

—Visitor, June 2026

Feedback also points to a modest, precinct-wide opportunity: broadening retail variety and evening trading hours to match the growth in foot traffic, particularly around markets and community events. This is a natural next step for a campaign that has already strengthened the precinct's core commercial anchors.



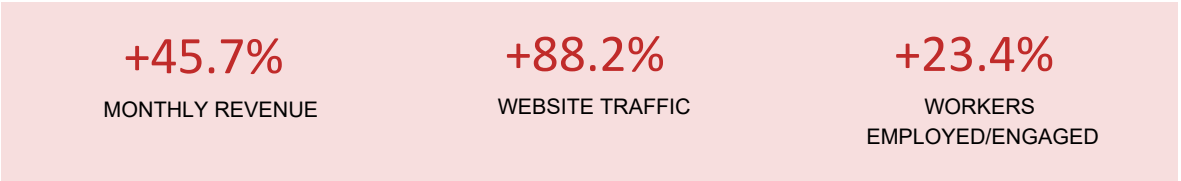
Business Activity at the Flour Mill of Summer Hill

**Current economic landscape: Sydney's small business environment is under real pressure. The Reserve Bank's cash rate is 4.35% (as of 12/08/2026), with inflation at 3.5% in July 2026. Unemployment has risen to 4.5% nationally (July 2026), the highest postCOVID level. Small business sentiment specifically has fallen hard: Business NSW's May 2026 survey put confidence at -78.0, a record low and a third straight quarterly decline. 60% of businesses reported cost rises of at least 10% since February 2026 (fuel, freight, taxes/levies leading), hiring intentions are weak, 16% have cancelled growth plans, 37% of owners have used personal savings to stay afloat, and around 1 in 10 describe themselves as "at breaking point."*

FINDING FIVE

The Online Picture

The place audits capture how people use and feel about the physical precinct. Alongside this, participating businesses were asked to report their own performance over the same 12-month period, from checkpoint to checkpoint. Together, this data gives the clearest evidence yet that the campaign's impact extends well beyond the plaza and into the commercial performance of the precinct itself.



The full set of aggregate results, each measured as a 12-month percentage change, is set out below.

CATEGORY	METRIC	12-MONTH CHANGE
Workforce	Workers employed or engaged	+23.4%
Digital & Social	Website traffic (active users, Mar-May)	+88.2%
Digital & Social	Facebook followers	+35.9%
Digital & Social	Instagram followers	+18.9%
Digital & Social	LinkedIn followers	+31.1%
Digital & Social	Google reviews	+26.4%
Digital & Social	Google Business Profile interactions	+51.6%
Digital & Social	Email database	+19.9%
Financial	Monthly revenue (at checkpoint date)	+45.7%

Figures are aggregated across participating Flour Mill businesses and reflect 12-month percentage change to the most recent checkpoint.

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INSIGHT

Growth on the ground is matched by growth online. A near-doubling of website traffic, combined with double-digit gains across every social channel and a 51.6% increase in Google Business Profile interactions, indicates the precinct's brand identity is reaching well beyond the people who visit in person. Paired with a 45.7% rise in monthly revenue and a 23.4% increase in workers employed or engaged, this is tangible commercial evidence that the campaign is doing more than improving how the precinct feels — it is strengthening how it performs.

This directly reinforces two of the campaign's core objectives: it gives prospective investors and sponsors a measurable performance story to consider, and it demonstrates that stronger local business collaboration is translating into real commercial outcomes for the businesses involved.

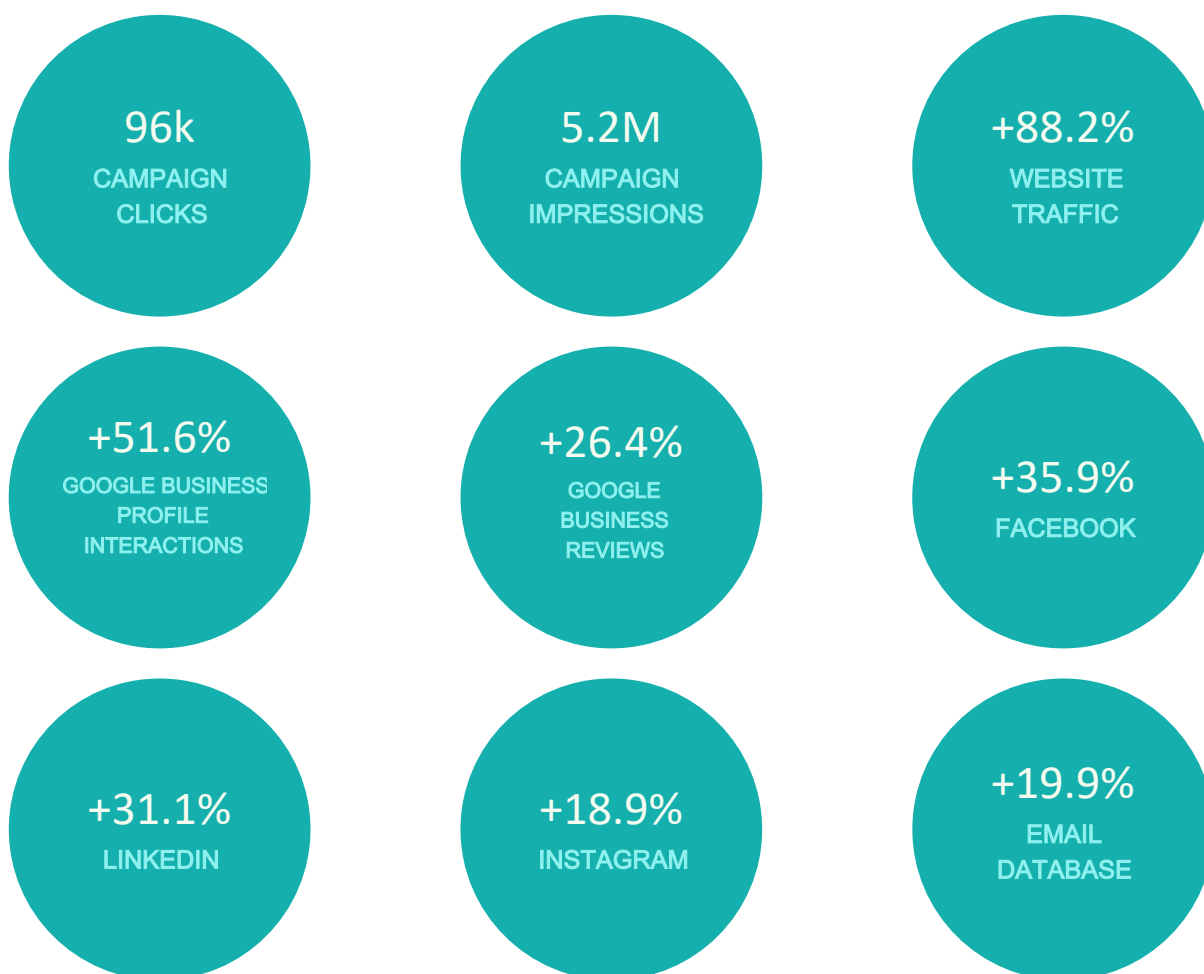


Flour Mill Customers

Digital Marketing Success

A coordinated digital marketing campaign was delivered over the course of the year. This commenced with a brand refresh and campaign theme and set out to build awareness of the precinct well beyond the people who happened to be walking past.

The campaign combined paid and organic activity across several channels: Meta advertising to build awareness of the precinct and its member businesses, broader digital advertising to extend reach into relevant local audiences, and a refreshed website with SEO-focused technical improvements and a new "What's On" feature to make events easier to discover. This was supported by strengthened Google Business Profile and Google Maps presence, an urban street poster and outdoor signage campaign, and a new membership with Inner West Mums to reach an established local audience.



INSIGHT

The digital campaign didn't just grow numbers in isolation — it shows up in how people talk about the precinct in person. Independent place audits recorded a 19.3 percentage-point rise in visitors recognising someone else in the space, and member businesses report the same effect from their side: businesses surveyed pointed to "greater awareness and appeal of the Flour Mill precinct" as one of the Collective's clearest wins, with one member crediting the Collective directly with building "awareness to the community about the existence of my business." Digital reach and on-the-ground recognition appear to be reinforcing each other, rather than running as two separate stories.

This growth in digital reach and business-level engagement directly supports the campaign's objectives around district brand identity and consumer engagement. Alongside the partnerships and revenue growth detailed elsewhere in this report, this gives prospective investors and sponsors a measurable digital footprint to sit alongside the precinct's physical one.



SPECIAL EVENTS & ACTIVATIONS

When The Precinct Comes Alive

Two flagship recurring activations were also independently audited using the same Inhabit Place methodology: the Sunday Flour Mill Market and a Friday Night Food Festival. Both events pulled in more people in a single four-hour session than the precinct sees across an entire standard weekday.

SPECIAL EVENT

Sunday Markets

Sunday Flour Mill Market · 7 June 2026 · 9:00am-1:00pm

2014

TOTAL PEOPLE
ON SITE

100%

FEEL SAFE

59.2%

STANDING
TOP BEHAVIOUR

41

VENDOR STALLS

The Sunday Flour Mill Market drew 2,014 people through the precinct in just four hours (9am–1pm)—more than double the entire day’s tally recorded in the standard June 2026 weekday audit (901 people over 11 hours).

Nearly half of all visitors interviewed (47.8%) said the market itself, rather than passing through, was the reason they came, and every single person interviewed reported feeling safe. “Community” was both the most common reason given and the most common feeling the space left people with.

“This is my happy place —I’m here to get some food and soak up the vibes.”

—Visitor, 7 June 2026



The Flour Mill Markets

SPECIAL EVENT

Night Food Festival

Friday Twilight Christmas Market · 21 November 2025 · 4:00pm–8:00pm

2,109

TOTAL PEOPLE
ON SITE

81.8%

FEEL SAFE

16.7%

EATING & DRINKING

30

VENDOR STALLS

Even on a cool, drizzly evening, the Friday night market and food festival pulled in the single largest crowd recorded across any audit in this program—2,109 people in a single four-hour window (4pm–8pm), again well over double a typical full weekday's tally. Food trucks, live music, a balloon artist and a facepainting stall anchored the evening, and auditors repeatedly noted visitors mingling under umbrellas rather than heading home early. It's early, practical evidence that the afterdark programming flagged in this report's recommendations already works when it's tried.

"It was a miserable day but it is a lovely night."

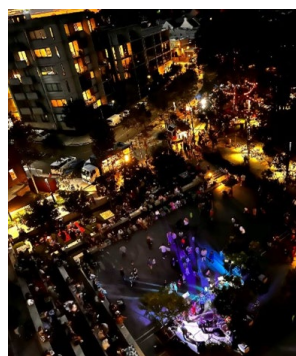
—Visitor, in passing, 21 November 2025

INSIGHT

Special events routinely draw two to three times the footfall of an ordinary weekday, and vendor infrastructure held up perfectly under that load—71 stalls assessed across the two events, all rated "good" condition, none "poor." Programming more of these moments, not just preserving the ones already running, is a direct route to the recurring-events and evening-trading opportunities identified elsewhere in this report.



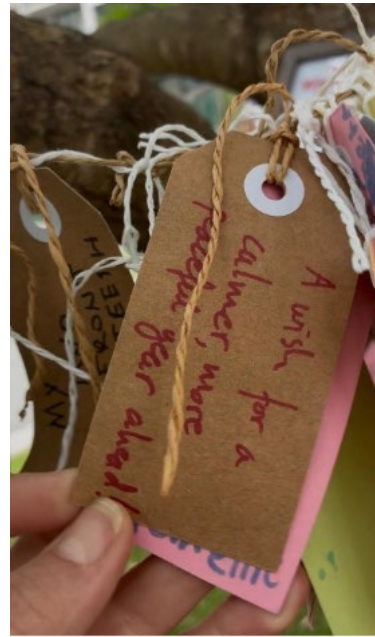
The Flour Mill Food Festival



Moments in Every Day

Not every reason to visit the Flour Mill comes from a headline event. Alongside the markets and flagship festivals, individual member businesses have run smaller, often volunteer-led activations that give the precinct its everyday rhythm. Activations included weekly art classes, courtyard wellness sessions, and a community tree that fills with handwritten wishes each December.

Each is modest in scale, but together they create regular, low-cost reasons for locals to return, and reflect a Collective that isn't just delivering one central campaign, but a community pitching in on its own initiative.



Christmas Wishing Tree and Mother's Day 'Leaves of Love' Tree

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School Holiday Programs – Eddy Spaghetti (magician and face painting)



Outdoor Fitness Group

Unwind FLOUR MILL winds



School Holiday Programs –Art in the Park

Unwind FLOUR MILL winds



Community Yoga



LISTENING TO THE COMMUNITY

What Locals Are Still Asking For

A credible report documents what is still missing, not only what has improved. Across all three audits, three requests recur regardless of how busy or well-regarded the space has become:

- **More shade** —particularly over the playground and plaza during the warmer months
- **Upgraded play equipment** —for a wider range of ages, from toddlers through to primary-school-aged children
- **Better public toilet access** —visitors consistently note it is hard to find, or difficult to use for those with mobility needs

None of these are signs that the campaign is falling short; if anything, the opposite is true. They are the kind of requests that come from a space people are using more, staying in longer, and caring enough about to want it to keep improving.



CONSLUSION

A year into the Flour Mill Unwinds campaign, the clearest achievement is how far the precinct's brand has travelled —both online and in the minds of the people who use the space. Website traffic is up 88.2%, Google Business Profile interactions up 51.6%, and social followers have grown across every platform (Facebook +35.9%, LinkedIn +31.1%, Instagram +18.9%), on the back of a digital campaign that generated over 96,000 clicks, 5.02 million impressions and 1,300 new followers.

This digital reach is matched by what independent place audits found on the ground: the share of visitors recognising someone else in the precinct rose 19.3 percentage points over the year, direct evidence that the Flour Mill's identity is becoming familiar, not just visible.

Member businesses report the same shift from their side of the counter. Businesses surveyed pointed to "greater awareness and appeal of the Flour Mill precinct" as one of the Collective's most significant contributions, with The Granary Cafe crediting the Collective specifically with building "awareness to the community about the existence of my business" —recognition that has translated into commercial confidence, with Little BIG describing how the campaign's measurement work let it "put real numbers on the Markets' economic benefit to businesses and sentiment/brand benefit to the community."

A year ago, the Flour Mill of Summer Hill was a well-regarded but largely locally-known corner of the Inner West. The evidence gathered since —refreshed branding, a near-doubling of digital reach, and a community that increasingly recognises itself and its businesses —shows a precinct that has moved from being known by its neighbours to being known as a destination in its own right. Sustaining that requires the same investment that built it: continued coordination, continued campaign activity, and continued measurement to prove the story as it keeps unfolding.

It is a positive trajectory, and one worth continued investment to sustain.

Report Sources

This report draws on three independent Inhabit Place audits of the Flour Mill Precinct, Summer Hill (August 2025, February 2026 and June 2026), and special event audits (November 2025, June 2026) using the Gehl Institute's Public Life and Public Space framework. Full data available on request.

Digital Marketing information has been provided direct from sources.

Business financial reporting provided by the businesses and present as averages.



PROJECT TEAM

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The Flour Mill Business Collective

Established in 2025, the Flour Mill Collective is a not-for-profit association supported by the NSW Government, along with contributions from its members and partners. Our mission is to collaborate closely with Flour Mill businesses and the local community to unlock the full potential of this vibrant precinct, fostering connection, creativity, and shared purpose.

Strategy, brand development, district and campaign rollout:



Place Auditing:



Flour Mill Collective Members



Little BIG Foundation



Headlands Coffee



The Granary Cafe



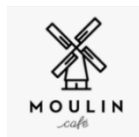
Paper, Rock, Scissors Art Studio



Flour Mill Markets



Hampton & French



Moulin Cafe



Bekya Egyptian Spice



Bubba Desk - Child Care and Coworking



Jannawai Children and Families centre



Reclaim the Future



Asterisque Dessert Bar