


Draft Northern Beaches Economic Development Strategy

Business on the beaches



northern
beaches
council



An elderly Indigenous Australian woman with white hair tied back, wearing a white lace top, is performing a smoking ceremony. She is holding a bundle of green eucalyptus leaves over a piece of burning wood, with smoke rising from it. In the background, two other people are visible but out of focus.

Acknowledgement of Country

We acknowledge the traditional owners of this land and elders past, present and future. We recognise Aboriginal people as the original custodians of the Northern Beaches.

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Message from the Mayor



Over the last few years, our local economy and business community have shown strong resilience in the face of COVID-19 and natural disasters, with many incredible stories of our local businesses adapting to changing conditions.

We're also seeing more and more businesses starting up and growing on the Northern Beaches, reflecting the entrepreneurial spirit of our community.

We know that many people choose to run a business on the Northern Beaches for lifestyle reasons, seeking a greater work/life balance, and many want to reflect our local community values and support our environment, while running their business.

While it's a great place to do business, it doesn't come without its challenges, including traffic congestion, finding the right staff, the absence of a major CBD and the current pressure on existing industrial lands, making it hard to find affordable business space.

Council has prepared this draft Economic Development Strategy to tackle these challenges. Council wants to highlight what makes the Northern Beaches economy distinct and set out what sort of economy we want for the future. This strategy sets the proposed strategic directions to support a more sustainable and resilient economy over the next decade and beyond.

Together with the business community and government agencies, the strategy aims to create the conditions to encourage new businesses, nurture innovation, revitalise our town centres and help businesses transition to a low carbon economy.

Your feedback as a community is invaluable so let us know how we can work together to continue to attract, sustain and support businesses on the Northern Beaches.



Michael Regan
Mayor



Executive summary

Sydney's Northern Beaches offers a lovely natural environment and enviable lifestyle. Many know the area as a recreational and tourism hub, yet few realise the rich and diverse economic opportunities on offer.

This lack of awareness reduces demand for locally produced products and services, and limits the ability for businesses to attract talented staff. We need to establish an economic vision for the Northern Beaches that can support business and employment growth, to avoid the area becoming a dormitory suburb.

This approach can guide the creation of more job opportunities that align with the skills of the working population.

Latest Census data shows a deficit of 38,000 jobs compared to resident workers and that the jobs in the local government area (LGA) do not align with the skills of residents.

This jobs-and-skills mismatch means many residents commute long distances for work, and local businesses recruit staff from outside the LGA.

This increases traffic congestion, gives people less free time and negatively impacts both liveability and productivity.

The COVID-19 pandemic highlights the importance of a resilient local economy. Australia's closed international borders exposed the vulnerability of the tourism sector and interrupted supply chains across multiple industries.

Local lockdowns particularly impacted hospitality and retail businesses. The solutions to these pressures lie in helping businesses adapt to changing conditions.

This strategy aims to help in the post-COVID-19 recovery while planning for a sustainable economy long into the future. It sets out how Northern Beaches Council can attract, sustain and support businesses by answering the following questions:

- What challenges do businesses face?
- What are the opportunities to increase the number of local jobs?
- What sort of economy do we want for the future?

Challenges

Traffic congestion

This common frustration of business owners slows transport for staff, customers and suppliers, thus reducing profits.

No major CBD

It is harder to attract major corporates and provide jobs that match residents' skills without a significant CBD.

Lower paid roles

The absence of international students and working travellers, as well as rising housing costs that force many key workers to live outside of the LGA, has limited the pool of workers for lower-paid roles.

Industrial and warehousing areas

These areas must be protected as they allow for existing and emerging industries that support the ongoing performance and functioning of the Northern Beaches economy.

Opportunities

Innovation

New spaces or hubs could attract knowledge-based businesses and workers that align with the skills and aspirations of residents.

Entrepreneurship

With some of the most talented professionals in Sydney and higher levels of home-based businesses, a focus on start-ups, could grow the culture of entrepreneurship through information sharing, promotion and networking opportunities.

Town centres

Through a combination of promotion, events, public domain improvements and regulations to encourage outdoor dining, we can welcome locals and visitors back to the area's town centres.

Cultural and creative industry

The Northern Beaches is home to the largest concentration of cultural and creative businesses outside of Sydney CBD, offering scope for further growth by establishing creative hubs.

Green economy

With local consumers wanting sustainable products and a high proportion of residents have skills that could support a green economy, potential to explore and promote emerging investment opportunities in this sector.

Vision

***The Northern Beaches is
a more diverse, innovative,
vibrant and green economy.***

Diverse

refers to the variety of different industry sectors, a mix of business sizes, and people with different skills and backgrounds participating in a more resilient economy.

Innovative

refers to the entrepreneurial and creative economy that encourages start-ups, home-based businesses and creative and cultural industries.

Vibrant

refers to thriving and welcoming town centres that attract residents and visitors during the day and into the evening.

Green

is about protecting and enhancing the natural environment as the economy grows.

We have established objectives, actions and measures under each of these themes, as part of a economic development strategy that we'll use to partner with business, community groups and other levels of government, to deliver.

As we implement and monitor this strategy over the next decade and beyond, we will measure success across a range of indicators, such as:

- closing the gap between the jobs available locally and career aspirations of the community
- increasing business start-up rates
- growing visitation and local spend
- reducing CO2 emissions and supporting a more circular economy.



1 Introduction

1.1 Purpose

The Northern Beaches Economic Development Strategy outlines the key economic challenges and opportunities that we need to both address and embrace to provide a positive direction for the future. It sets out the critical issues and how we as Council can support businesses and jobs.

It builds on what we've heard from surveys of businesses and residents, and several comprehensive studies of the LGA's economy. You can view these studies on our website.

1.2 Defining economic development

We've used the following definition from the World Bank to shape our work:

The purpose of local economic development (LED) is to build up the economic capacity of a local area to improve its economic future and the quality of life for all. It is a process by which public, business and non-governmental sector partners work collectively to create better conditions for economic growth and employment generation.¹

Given the context of the Northern Beaches economy, we've then used a broader definition of sustainable economic development that considers the environment, inequality and living standards.²

In this regard, we consider **sustainable economic development** as:

- building up the area's economic capacity and resilience
- improving people's quality of life and access to opportunity
- encouraging increased levels of entrepreneurship and innovation
- aligning economic growth with environmental opportunities.

¹ Swinburn, Goga & Murphy, Local Economic Development: Developing and Implementing Local Economic Development Strategies and Action Plans, The World Bank, 2006, p. 1.

² N Leigh & E Blakely, Planning Local Economic Development: Theory and Practice, Sage, Los Angeles, 2017, p. 87.

1.3 Our role

Our role as Council is to provide leadership, good governance, advocacy and a competitive business-enabling environment. Specifically, we:

- provide leadership, corporate planning and governance
- manage land and property development through the approval process
- provide and maintain critical infrastructure and services
- provide environmental management and health services
- manage town centres and place activation
- maintain and communicate economic statistics and information.

Some of our recent dedicated support for the business community and local economy include:

- Business Support Service: a one-stop-shop to navigating Council approval processes or accessing NSW Government support
- Back to Business program: streamlined processes to help business reopen in COVID-safe conditions
- Business events and webinars: from digital marketing, resilience and recovery to financial planning and energy efficiency
- Beaches Biz News: a monthly newsletter to 14,000 local businesses that covers Council and NSW Government business news and support
- Employment precincts: structure plans and place plans for economic activity in existing and emerging employment areas
- Public domain improvements: from footpath upgrades to new public spaces
- Town centre activations and events: to encourage visitation to local centres and increase local spending
- Networks: including the Sustainability Business Network and Culture Map Live to encourage businesses to network and share best practice
- Waste education: encouraging a circular approach to waste, through initiative such as Swap for Good

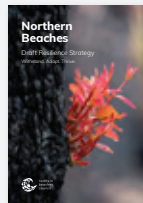
Community Vision

Northern Beaches - a safe, diverse, inclusive and connected community that lives in balance with our extraordinary coastal and bushland environment

Community Strategic Plan 2040



Wholistic Lead Strategies



Resilience Strategy

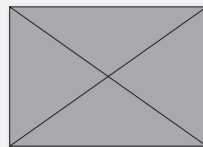


Local Strategic Planning
Statement - Towards 2040

Pillar lead strategies (10 years+)



Environment and Climate
Change Strategy

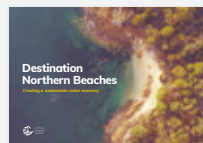


Economic
Development
Strategy



Social
Sustainability
Strategy

Action plans



Destination Management Plan

1.4 Planning framework

This strategy sets a long-term vision (10+ years) for the Northern Beaches economy. It fits within the existing planning framework for the Northern Beaches, and also responds to directions from NSW Government from the Greater Sydney Regional Plan and the North District Plan.

1.5 What businesses seek from Council

In a survey of nearly 100 local business owners across all industry sectors and sizes, we heard we can best support the Northern Beaches economy by:

- advocating for NBN and improved internet speeds (14%)
- promoting local training and job opportunities (12%)
- retaining industrial and warehousing spaces (12%)
- addressing housing affordability for key workers (11%)
- promoting the Northern Beaches as a genuine business location (10%).

Individual businesses want us to assist them by:

- providing information on grants and financial support (13%)
- ensuring affordable rental space for start-up businesses (12%)
- supporting greater networking amongst businesses (12%)
- encouraging Northern Beaches residents to buy local (11%)
- streamlining council processes (e.g. DAs) (7%).



1.6 Resident's views

The Living in Place survey of nearly 1,300 residents in March 2022 identified what the community believes makes somewhere a good place to live and how people experience their local area against 16 attributes. By combining residents' values and with their local area experiences, we found that Northern Beaches residents had a high overall level liveability (67.8/100) compared to residents in rest of NSW (62.9).

Several of these attributes relate to the local economy, highlighting how the local economy influences people's decision making on where to live and also how it impacts their satisfaction with that place.

A prosperous economy

While rating as third last in importance, residents rated their experience as overall positive (7.2/10).

Good job prospects

Younger residents (18-34) rated this as higher in importance, but their experience was rated quite poorly (5.2/10).

Affordable decent housing

Again, younger residents (18-34) rated this as significantly high in importance but was the least positively experienced attribute (3.6/10).

High quality education opportunities

While only 12th in importance, residents rated their experience as positive (6.7/10).

A diverse range of shopping, leisure and dining experiences

This was rated as relatively important (5th) and local experience was generally positive (7/10).

Lack of road congestion

This was rated as relatively important (7th), but experience was significantly poor (4/10).

We also asked residents to rate their personal financial circumstances, with an average rating this as 6.7/10 (compared to 6.5/10 for rest of NSW). When asked about the future, 27% forecast that their personal financial circumstances will get better in 12 months and 18% believed they will get worse.

In terms of broader local economy, when asked if they thought the economic situation in the local area will change over the next year, 30% said it would get worse, 51% said it would stay the same and 19% said it would get better.

2 Economic overview

We have derived the following information from the background analysis, which you can read on our website.

Figure 1

Economy at a glance

(Based on Australian Bureau of Statistics (ABS) Census data from 2016-2021, unless shown otherwise.)

\$18.41b GRP in June 2021	↑ \$1.4b from 2016 ³	136,226 Employed residents in 2021	↑ 6,536 from 2016
263,554 Population in 2021	↑ 10,676 from 2016	53.8% live/work locally in 2021	↑ 1.7% from 2016
38,024 residents moved out	↓ 12,540 net loss of residents	44% Work from home in 2021	↑ 37% from 2016
35,687 Local businesses in 2021	↑ 5,554 from 2016 ⁴	3.7% Unemployed in 2021	↑ 0.8% from 2016 ⁵
98,335 Local jobs in 2021	↑ 10,101 from 2016	1.97m Visitors in 2020-21	↓ 389k from 2016 ⁶

Fastest growing industries (jobs)

↑ 3,106 health care and social assistance	↑ 1,719 professional, scientific and technical services	↑ 1,181 construction	↑ 984 education and training
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2.1 Industry analysis

Slow and steady growth

Over the past 10 years, the Northern Beaches economy has maintained a steady average growth rate of 2.0% per annum, yet this is slower than the NSW average of 2.4%. In more recent years, the number of local jobs has increased more than the number of employed residents.

Low unemployment

Rates of unemployment are consistently lower; over the last eight years to June 2019, the average Northern Beaches unemployment rate of 2.9% compares to 4.8% for Greater Sydney. At the height of the COVID-19 pandemic, unemployment reached a peak of 4.6% in September 2020.

³ (.ID consulting)

⁴ (Australian Business Register)

⁵ (.ID consulting)

⁶ (Tourism Research Australia)

Strengths

The sectors that contain the highest number of local jobs are, in order: health care and social assistance; retail trade; professional, scientific and technical services; and construction. Manufacturing and wholesale trade are responsible for half of exports from Northern Beaches (33% and 18% respectively). The arts and recreational services sector, has the highest concentration of jobs compared to the NSW average.

Entrepreneurial spirit

Approximately 36,000 businesses on the Northern Beaches equates to nearly one business for every three local jobs or one business for every four resident workers. There's a high proportion of business owners among the resident workforce, and 60% of Northern Beaches businesses are sole traders and 30% are small businesses employing fewer than five staff.

Highly skilled resident workforce

The Northern Beaches is home to a high concentration of mid-late career professionals. Strong growth in rates of educational attainment and high socio-economic status help to explain the strong entrepreneurial culture, as residents have the skills, experience, contacts and capital - ingredients that support entrepreneurial success.

Visitor economy

Visitation grew considerably in the five years prior to COVID-19 with 2.7 million visitors in 2019-20 of which 80% were day trippers. That year the tourism sector directly generated 9,360 jobs and another 4,316 indirectly, accounting for 12% of all local jobs - twice the NSW average. While visitor numbers dropped by 717,000 in 2020-21, international travel and domestic overnight stays are starting to rebound.

Cultural and creative sector

The 7,000 local jobs in the cultural and creative sector generated \$1.6 billion in output and \$790 million in value added in 2018-19, or 6.5% of the Northern Beaches economy. Businesses include specialised design services, photography, book and magazine wholesaling, arts education, architectural services, musicians, writers and performers, and advertising services. Almost half of these workers run their own business.

Home-based businesses

In the 2016 Census, 6.1% of the workforce were working at home and were owners or managers, compared to 2.5% for Greater Sydney. The most common industry was professional, scientific and technical services (37% of total). The largest number of home-based businesses were in Warriewood, Mona Vale, Manly, Fairlight, Frenchs Forest and Brookvale. The recent increase in professional co-working spaces will support this growing sector.

2.2 COVID-19

Australia's closed international borders impacted the Northern Beaches economy and had variable economic impacts across the LGA.

COVID-19 is fundamentally shifting spending patterns on the Northern Beaches. Three lockdowns between March 2020 and October 2021 acutely reduced local spending. However, there has been a relatively strong recovery since restrictions lifted, as residents stayed home and shopped locally.

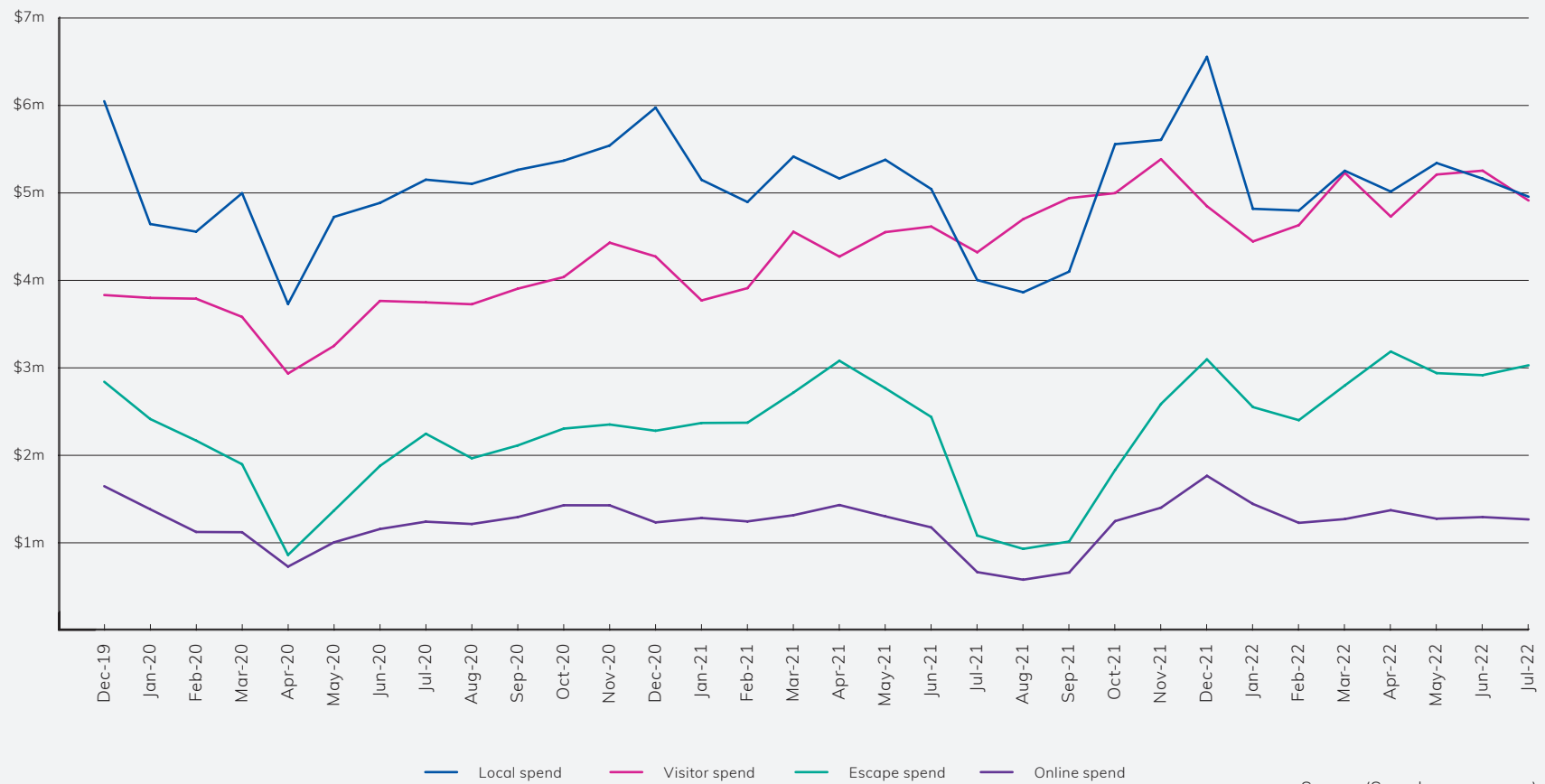
Online spending increased in the last two years as consumers and businesses adapted to new ways of purchasing. With the growing trend to work from home, spending outside the Northern Beaches (called 'escape spend' in the diagram below) has been slower to recover than local spending.

While total spending on the Northern Beaches is showing signs of recovery to pre-pandemic levels, impacts differ. Dining and entertainment, which were subject to the greatest restrictions, saw a volatile spending pattern, whereas essentials such as grocery shopping have been stable. Bulky and household goods and trades have enjoyed strong demand over the last two years.

Those centres that rely more on Dining and Entertainment and visitor spend, such as Manly, have seen more turbulent spending patterns during COVID-19, compared to population servicing centres such as Mona Vale.

Figure 2

Trends in spending on the Northern Beaches December 2019 to July 2022



Source: (Spendmapp.com.au)









3 Employment precincts

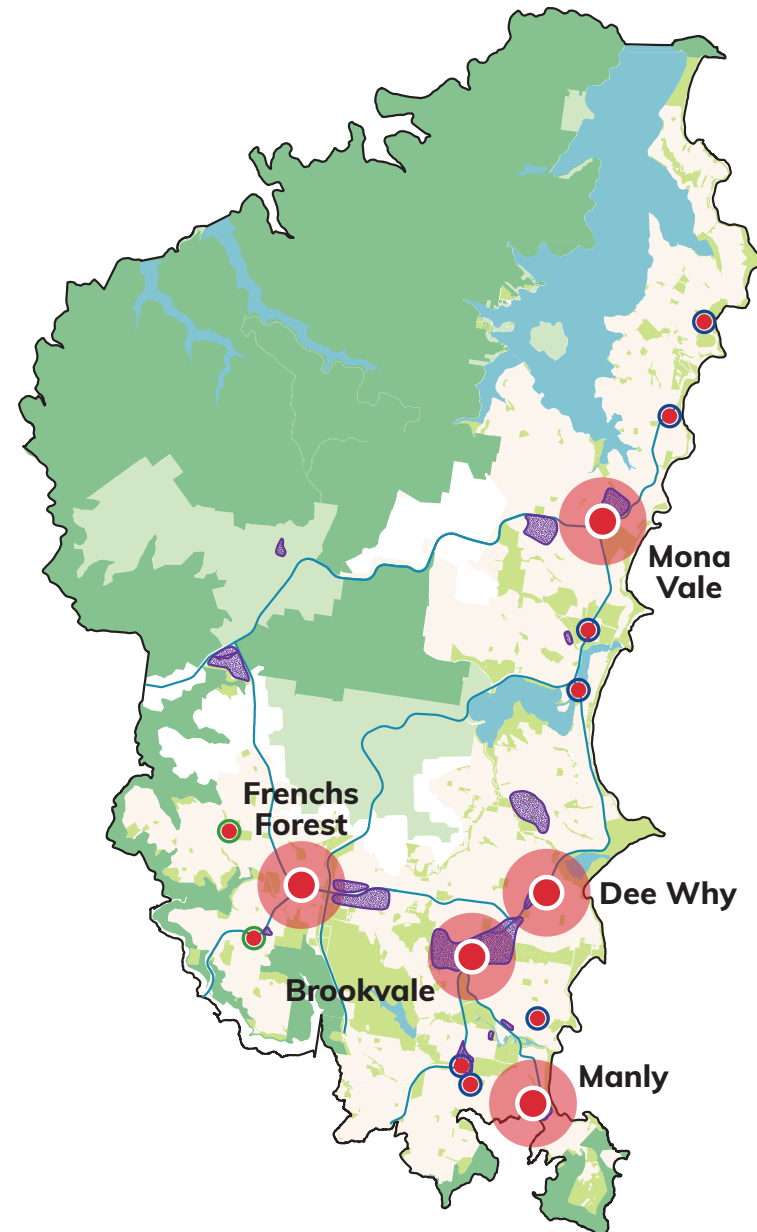
To inform the Economic Development Strategy, we sought to understand the different employment precincts in the LGA.

The following employment precinct analysis is informed by our existing planning work, as well as the background studies that are listed on our website.

By looking at the jobs (current and forecast), spending, floorspace breakdown, and challenges and opportunities for each precinct, we find that the Northern Beaches economy offers an array of business settings and economic functions across industrial precincts, business parks, and strategic and local centres.

Key

 Urban area	 Strategic centre
 National park	 Coastal village
 Major public parkland/ bushland	 Forest village
 Public transport and active travel connection	 Employment hub







3.1 Frenchs Forest

Frenchs Forest is transitioning to a strategic centre with a Health and Education Precinct anchored by Northern Beaches Hospital. Frenchs Forest Business Park will build upon its 9,000+ existing jobs and support clusters of health services; specialised transport, postal and warehousing activity; and growing advanced manufacturing activity, including pharmaceutical and med-tech companies such as Pharmaxis, Conmed and Kirsch Pharma.

The NSW Government's Frenchs Forest 2041 Place Strategy aims for Frenchs Forest to be a major driver of job growth and economic activity and a hub of knowledge-intensive jobs, innovation and service delivery. It plans for more than 2,000 new jobs within the new town centre, primarily in allied health, recreation, education and accommodation sectors.

Image: Frenchs Forest new town centre.
Artist's impression courtesy of CHROFI

Challenges

Planning for Frenchs Forest will address the sense of disconnection between the hospital and the business park to encourage greater collaboration. We will need to protect the business park's current functions from population serving activity to enhance its operational capacity and support the new town centre.

Opportunities

Frenchs Forest's strengths are the health sector (including the hospital), the planned town centre and business park. These assets can attract new allied health, professional services and education businesses.

Planned new commercial and retail spaces in the town centre will attract businesses and investment. The dedicated commercial spine along Warringah Road will accommodate more than 16,000 sqm of commercial floor space such as free-standing offices (including co-worker space for start-ups) and other uses such as medical hotel and allied health.

An additional 20,000 sqm of retail floor space will be focused on a Civic Heart, with eateries surrounding public open spaces, and a Market Quarter for shopping and everyday services.

The 8,000 sqm of planned education, training and research facilities could see the business park evolve as a medical-related corporate business park, alongside the hospital and a potential tertiary education presence.

In the longer-term infrastructure investment, including the proposed Beaches Link tunnel, will make it easier for people to get to work and improve connections to Sydney's Eastern Economic Corridor.

Key industries

Health care and social assistance,
Transport, postal and warehousing

Jobs in 2016 - 10,791

Jobs by 2036 - 13,682 (+2,891)

Floor space

Retail - 12,117m²

Commercial - 516,365m²

Health and education - 68,313m²

Community - 103,123m²

Local spending in centre 2021/22

\$270 million

Top spending categories

Groceries and supermarkets - 31%

Professional Services - 26%

Dining and Entertainment - 18%



3.2 Brookvale

Brookvale has the strongest concentration of employment on the Northern Beaches and is home to the largest industrial precinct in Greater Sydney's North District (at 86 ha). There is a wide mix of small businesses and covering the construction and automotive industries, small-scale manufacturing, wholesale trade and professional services. Warringah Mall provides higher order retail and services, complemented by Northern Beaches TAFE, Brookvale Community Health Centre and the B-line bus stop.

Brookvale will evolve as a place to work, create and innovate. Businesses are attracted to the centre as a place to make noise and do things that are not suitable anywhere else. The resurgence of the brewery scene in Brookvale, creative industries and specialist recreation functions, complement the centre's broader economic function while providing places for workers, visitors and nearby residents.

Image: Revised Draft Brookvale Structure Plan
Artist impression - The Core/Pittwater Road view

A revised draft Brookvale Structure Plan has been prepared to provide the strategic land use planning framework for Brookvale over the next 15 years and reinforce its role as a Strategic Centre. While Brookvale will continue to be a place for jobs, new housing will be provided to leverage infrastructure improvements such as the B-line. Based on updated traffic modelling, the draft Structure Plan identifies growth potential for 975 new jobs and 1,300 dwellings.

Challenges

Brookvale's mix of land uses lacks a central focal point or heart of activity. Its city-serving industrial functions are essential and must be protected given then continued strong demand for industrial floor space to 2036 and constrained supply elsewhere.

Opportunities

Brookvale is a place of gritty industry, creativity and urban cool. It could be home to the next generation of innovative entrepreneurs to form a creative and innovation hub.

The draft Brookvale Structure Plan aims to increase professional employment by establishing a central hub of commercial, civic and entertainment functions, in close proximity to the B-line and Warringah Mall.

This includes a potential site for a standalone commercial building and a new town square. Pittwater Road will maintain its mixed-use role, with new buildings up to eightstoreys, continuing to support ground floor showrooms and home materials and creative and maker spaces. Industrial lands both east and west of Pittwater Road will be retained and the draft Structure Plan proposes to increase building heights to four storeys to support modern industrialised floorspace.

Brookvale's heritage as a place of innovation - it is the birthplace of ugg boots and a surfboard making capital - could form part of a branding exercise as it welcomes more innovators and entrepreneurs. This would raise awareness of the diverse, and often hidden, economic activities the precinct nurtures to encourage future investment and innovation.

Key industries

Retail, Manufacturing and Wholesale

Jobs in 2016 - 16,476

Jobs by 2036 - 18,208 (+1,732)

Floor space

Retail - 113,321m²

Commercial - 182,062m²

Industrial - 342,989m²

Health and education - 75,749m²

Community - 41,796m²

Local spending in centre 2021/22

\$1,380 million

Top spending categories

Department Stores and Clothing - 24%

Groceries and Supermarkets - 14%

Specialised and Luxury Goods - 14%



3.3 Dee Why

Dee Why is on track to become a thriving cosmopolitan centre by the sea. It is a population-serving mixed-use centre that offers housing, retail, civic service and commercial functions. It is one of the most densely populated, multicultural communities on the Northern Beaches.

Dee Why's central area, serviced by the B-line, is seeing a growing night-time economy that complements the established evening economy precinct at Dee Why beachfront .

Challenges

Pittwater Road intersects Dee Why, making it less attractive and causing a lack of vitality compared to other strategic centres.

Opportunities

Dee Why's local businesses are adapting to meet the changing needs of a growing population. This opens up the opportunity to celebrate the diversity of Dee Why's food offerings and create unique cultural and creative experiences. Dee Why has an established night-time economy at the beachfront (The Strand) and one is emerging in the town centre.

Key industries

A mix of local population-serving businesses with no industry specialisation

Jobs in 2016 - 6,532

Jobs by 2036 - 8,069 (+1,536)

Floor space

Retail - 35,807m²

Commercial - 259,894m²

Industrial - 6,106m²

Health and education - 65,273m²

Local spending in centre 2021/22

\$669 million

Top spending categories

Groceries and Supermarkets - 32%

Professional Services - 20%

Dining and Entertainment - 16%



3.4 Manly

Manly is the visitor gateway to the Northern Beaches, accounting for a quarter of the international tourists to NSW. It features attractive frontages to the harbour and beach, iconic Norfolk Island pines and older historic buildings.

Manly is a cohesive precinct with retail and hospitality industries close to the beach, a thriving night-time economy and knowledge-intensive industries near Manly Wharf. It has seen significant growth in professional employment on the Northern Beaches in recent years and features the highest retail and commercial rents in the LGA .

Challenges

Manly's cosmopolitan character, proximity to the CBD by ferry and lifestyle next to the world-famous beach support growth in high skilled professional employment in a premium office market. Future floor space growth is constrained by heritage values and the seaside coastal character that makes it so popular with visitors.

Opportunities

Manly Beach will remain a major domestic and international tourism destination with strong prospects for tourism related industries such as accommodation and food services, and retail. Efforts to grow other specialisations such as arts and recreational services, and professional, scientific and technical services would need to leverage Manly's international appeal.

Key industries

Accommodation and food services
and Professional, scientific and
technical services

Jobs in 2016 - 9,986

Jobs by 2036 - 12,519 (+2,533)

Floor space

Retail - 26,699m²

Commercial - 255,780m²

Health and education - 250,751m²

Community - 185,879m²

Local spending in centre 2021/22

\$597 million

Top spending categories

Dining and Entertainment - 40%

Groceries and Supermarkets - 17%

Specialised Food - 11%



3.5 Mona Vale

Mona Vale will be the contemporary, urban heart of the north of the Northern Beaches, offering a local, coastal village atmosphere. It is at the end of the B-line and the centre is a 10-minute walk from Mona Vale Beach. Mona Vale will accommodate employment growth for the northern end of the LGA.

Mona Vale provides space for community, residential, retail, commercial, industrial and education uses and is expected to service an increasingly older population. Mona Vale's industrial area caters for industrial urban services and a thriving cluster of specialist marine manufacturing, wholesale and specialist trades that support Sydney's international sailing community .

Challenges

Mona Vale is more like a local centre; to meet the ambition of the North District Plan for it to be a genuine strategic centre, we need to encourage employment growth, while meeting the strong community desire to retain the local character of Mona Vale Village.

Opportunities

Industrial uses need to be protected given the services they provide to people in the Northern Beaches and Greater Sydney. Increase capacity for industrial floor space can help to meet the needs of modern industrial businesses.

With a high rate of home-based professional and creative businesses in the broader area, Mona Vale could include professional commercial office floor space to encourage entrepreneurs to work locally, grow their businesses and hire staff.

Key industries

Manufacturing and Health care
and social assistance

Jobs in 2016 - 5,524

Jobs by 2036 - 6,883 (+1,359)

Floor space

Retail - 24,193m²

Commercial - 102,341m²

Industrial - 83,906m²

Health and education - 41,111m²

Community - 65,559m²

Local spending in centre 2021/22

\$797 million

Top spending categories

Groceries and Supermarkets - 29%

Specialised and Luxury Goods - 13%

Dining and Entertainment - 12%

3.6 Local centres

Smaller locally serving centres include Avalon, Newport, Warriewood Square, Narrabeen, Freshwater, Manly Vale, Balgowlah, Forestville and Glenrose, alongside a range of smaller local and neighbourhood centres. They offer convenient services and providing employment opportunities near where people live.

Employment

Estimated at 18,000 jobs in all local centres and suburbs across the LGA, including home-based businesses. More than 4,000 new jobs between 2016 and 2036, with the highest rates of growth in Avalon and Newport (30% and 32%, respectively).

Key industries

Serving the local population, with the most common businesses in retail, cafes and restaurants and service industries.

Challenges

Smaller local centres compete with larger regional shopping centres that can dominate and draw away customers. Traditional bricks and mortar retailers also need to overcome the rise of online retailing by offering new value-added experiences and services.

Opportunities

There is potential market demand for smaller format supermarkets that could be accommodated in local centres. Outdoor dining is likely to be a growing trend, which could create opportunities for night-time economy offerings in selected local centres. Local centres will remain important to people working from home and to the LGA's growing professional home-based-business network.

3.7 Larger industrial precincts and business parks

Business and industrial parks - the larger non-centre employment precincts - include Warriewood Business Park and its adjoining industrial area, Cromer Industrial Park and Auslink Business Park. These are generally focused on business-to-business economic activity rather than direct population-serving activity, giving them a different character to other employment precincts.

The precincts are important to supply chains with economic multiplier effects generating downstream employment. They enable the economic transition to high value opportunities that generate local high skilled employment including emerging advanced manufacturing and online retailing activity.

Employment

12,000 jobs, with 1,000 jobs forecast to be added in the three precincts between 2016 and 2036. Increasing automation is likely to reduce labour densities. However, the increasingly high skilled employment generated from these sites will benefit the Northern Beaches economy.

Key industries

Business and industrial parks contain businesses typically not suited to the strategic centres or smaller local centres, such as large format manufacturers: medical and pharmaceutical manufacturers, wholesalers, retail suppliers and head offices.

Challenges

There is an increasing shortage of industrial zoned land demand to meet projected demand for light industrial floor space. We will continue to retain and manage industrial and business park land on the Northern Beaches by managing non-industrial uses and exploring opportunities to grow floor space by increasing building heights.

Opportunities

Leveraging the LGA's local entrepreneurial strengths will grow a local cluster of innovative manufacturing and automated supply chain activity. Protecting and growing modern industrial floor space for future creative industrial and advanced manufacturers will support local business and high skilled employment opportunities. The rise of online retailing and demand for same-day delivery highlights the importance of 'last mile' delivery options close to residential areas. As this demand increases, the Northern Beaches will need more local industrial and urban service lands.

4 What we've heard - SWOT

We consulted with the local business community in preparing the Economic Development Strategy, including our Economic and Smart Communities Strategic Reference Group.

The Economic & Smart Communities Strategic Reference Group has provided strategic direction and advice for development of this strategy.

We also undertook site visits to key business precincts, conducted 25 one-on-one interviews and surveyed nearly 100 business owners from across the LGA.

Insights from business community engagement and desktop analysis, have informed an analysis of the LGA's strengths, weaknesses, opportunities and threats (SWOT).

4.1 Strengths

Attractive environment, lifestyle and global connectivity

The Northern Beaches is both a popular place to visit, and a desirable location to live and establish a business due to its beautiful beaches, coastline and bushland setting. It's international exposure as a visitor destination is also a potential source of increased trade and investment.

A strong and diverse business base

The Northern Beaches economy is a diverse mix of often smaller businesses spread across a range of industries and business precincts. This industry diversity is a strength that should be used to promote the area as an important business location.

Creative and entrepreneurial culture

There is a strong entrepreneurial base on the Northern Beaches, with talented people at the peak of their careers moving to the Northern Beaches and establishing home-based businesses. The local community supports local businesses and provides a good marketplace for new products. There is a common view the Northern Beaches is a great place for new creative and innovative businesses to get started.

4.2 Weaknesses

Jobs and skills mismatch

With 42% (56,629) of residents working outside of the region and 38,000 less jobs than employed residents, there are not enough jobs or the right type to support the residence base. Conversely, a high proportion of key workers, such as schoolteachers, commute in from outside of the LGA, which could reflect the LGA's higher housing costs.

Falling relative worker productivity

The average worker productivity has fallen compared to the average for Greater Sydney. In 2018-19 this was approximately \$5,354 Gross Regional Product (GRP) less per worker annually, as lower economic value jobs, such as retail and health care, make up a greater share of new jobs created locally. Attracting high-end jobs, such as in professional services, to the Northern Beaches will reverse this trend.

Lack of major commercial core

While the value of residential development applications doubled between 2011-12 and 2021-22, most non-residential building approvals were for education and health, retail, or warehouses purposes. There has been relatively little new commercial office development, which limits growth of professional jobs on the Northern Beaches.

Transport challenges

Traffic and parking issues are a key challenge of doing business on the Northern Beaches. Congested roads impact efficiency and parking is a particular challenge in centres. Poor public transport connections compound traffic congestion and limit the potential to grow business precincts compared to other areas in Sydney. Many business owners and workers feel that private car travel is their only viable transport option, resulting in a higher proportion of private motor vehicle travel to work for residents than the average for Greater Sydney.

4.3 Opportunities

Transport connections between employment precincts

The frustrations around traffic congestion and parking raise the opportunity to plan for better, high-frequency public transport options connecting key economic precincts.

Affordable housing

We can both advocate for more affordable housing in the LGA and identify urban renewal areas for affordable rental housing through implementation of the Northern Beaches Affordable Housing Contribution Scheme.

Market businesses to attract investment

The diverse range of innovative and creative businesses that already exist, from biomedical campuses to 3D printing manufacturers, can be promoted to reinforce the idea of the Northern Beaches as a place to successfully run a business. Options could include a marketing strategy to highlight the breadth and diversity of businesses based locally.

Commercial space

The LGA needs more office space to accommodate the growth of commercial enterprises. Provision of a commercial core is a strong focus for Brookvale to encourage more professional employment.

Co-working spaces and innovation hubs

We can look to support and promote the establishment of co-working spaces and innovation hubs in local and strategic centres. There may be opportunities to repurpose vacant or underutilised premises and/or ensure new developments provide enough smaller adaptive commercial space.

Home-based business networking

We need to speak to professionals working from home to understand the specific business development needs of this sub-sector. We could also encourage more talented professionals who work elsewhere to start their own businesses on the Northern Beaches.

Collaboration to grow specialised opportunities

We should explore the potential to link key health assets, local manufacturing companies and education research providers to grow medical science opportunities. There are also opportunities to explore collaborations between the hospitality, tech start-ups and cultural and creative sectors.

Creative hub and local producers

A creative hub at Brookvale with marketing and other support services could foster and strengthen the emerging creative and cultural industry network and support other emerging hubs, such as Freshwater and Avalon, to encourage mentoring, partnerships and integrated supply chains.

Café culture and dining

Public domain improvements such as footpath widening, traffic calming and lighting treatments will encourage alfresco experiences.

Tourism

Domestic tourism and re-emerging international tourism will grow with place-based activations such as events, outdoor dining and live music and promotion through regional campaigns.

Net zero and a circular economy

The transition to a low-carbon and circular economy could be utilised to make the Northern Beaches a future green economy, inspired by a beautiful natural environment and a highly talented resident workforce, with passion and skills to help the economy de-carbonise and keep resources in use for longer.

4.4 Threats

Lack of housing and business premises affordability

The Northern Beaches is an expensive place to live or operate a business. This impacts the ability of local businesses to attract necessary key workers and limits the ability to find affordable business premises. The high cost of leasing a business space drives both the high incidence of home-based businesses, and the rise in co-working spaces.

Industrial rezoning

We need to protect industrial areas that are under threat from competing land uses but serve an important function in terms of supply chains and urban services. Affordable industrial areas will support the next generation of modern industries.

Changing retail behaviour

Retail trade is an important sector to the Northern Beaches economy in terms of total employment and the visitor economy. Large shopping centres are doing relatively well, but some of the smaller retailers struggle from rising online shopping. Feedback indicates this is particularly so for smaller, traditional bricks-and-mortar retailers.

COVID-19 pandemic

The reduced international travellers, lockdowns and social distancing measures have negatively impacted tourism operators and accommodation providers, as well as cafes and restaurants. It has highlighted the reliance of many of the local centres on the visitor dollar and local discretionary spending.

5 A strategy to meet the vision











Four recurring themes have emerged from our consultation, research and analysis. We have used these to set directions for the short-term recovery and longer-term resilience of the Northern Beaches economy.

In this section, we establish a goal under each theme, along with a series of objectives. There are specific actions for each theme to be delivered over the next four years, either through direct action of Council, partnering with local businesses and networks, or advocating to NSW Government.

5.1 Vision

**The Northern Beaches is
a more diverse, innovative,
vibrant and green economy.**

Key

Low (\$0-\$15k)	
Medium (\$15k-\$500k)	 
High (\$500k-\$5m)	  
Significant (\$5m+)	   





5.2 Theme 1: Diverse economy

Goal 1













Diverse means a variety of different industry sectors and mix of business sizes, with more people participating in a resilient local economy. Employment precincts are preserved and enhanced to support existing services and emerging industries. More affordable housing is available to retain/attract key workers. The economy will be inclusive and allow all people to participate.

Objectives

1. Protect, retain and enhance employment lands with each precinct having a distinct role, character and identity
2. Support innovation and adaptability in economic land uses
3. Increase affordable housing to attract and retain key workers
4. Recognise and promote the LGA's rich economic history and diversity to attract investment
5. Prepare businesses for future shocks and stresses

Table 1

Diverse Economy: Action Plan

Action	Influence	External Partners	Timing	Measure Of Success (Internal)	External KPI	Cost
Revitalise employment lands through the Brookvale Structure Plan, Mona Vale Place Plan and Northern Beaches Hospital Precinct Structure Plan	Direct	Department of Planning and Environment	1-2 YR	Completion of structure plans and place plans	Increase the number of businesses and jobs in strategic employment centres	  
Create the conditions to support innovation in the manufacturing and logistics sectors by managing demand from non-industrial uses and enhancing the capacity of industrial zoned land	Direct	Department of Planning and Environment	1-2 YR	No loss industrial land zoning (ha) and capacity through new LEP/DCP	Increase the number and value (\$) of commercial or industrial DAs approved	
Prepare an investment brochure to promote the Northern Beaches as a genuine business location, highlighting local innovation and creativity	Direct	Investment NSW/ Chambers	2-3 YR	Investment brochure launched for select precincts	Increase the number of businesses and jobs in strategic employment centres	 
Implement the Northern Beaches Affordable Housing Scheme and continue to advocate to NSW Government to increase affordable housing stock	Advocate	Community Housing Providers	ongoing	Ongoing discussions with Community Housing Providers	Increase the number of affordable and social housing dwellings	
Monitor emerging skill gaps and promote local training and emerging job opportunities	Collaborate	TAFE/High schools	2-3 YR	Engage with tertiary education providers on course demand and local placements.	Decrease in local unemployment rate, including youth unemployment	
Enable the Northern Beaches to become an inclusive economy by sharing of inclusive employment and business practices	Collaborate	Social enterprises or NDIS provider	1-2 YR	Continue to sponsor annual disability inclusion award and promote case studies of inclusive businesses	Increase labour force participation of residents in need of assistance	
Continue to advocate for improved public transport into and out of the LGA to ensure easy access for key workers to local jobs	Advocate	Transport for NSW	ongoing	Continue to advocate to Transport NSW for transport improvements	Increase public transport share of journey to work into and out of Northern Beaches	
Support business recovery and resilience by promoting services and programs to help businesses prepare, adapt and thrive	Direct	SERVICE NSW	ongoing	Provide business newsletters and webinars linking business to NSW Government grants	Increase the number of new businesses on the Northern Beaches	 



5.3 Theme 2: Innovative economy

Goal 2

Innovative means an entrepreneurial and creative economy that encourages new businesses. Innovative forms of business will be nurtured and residents will be supported to establish home-based businesses. We will build a culture of entrepreneurship and value locally produced goods and services.















Objectives

1. Nurture and celebrate innovation to attract knowledge-based businesses and workers
2. Encourage residents to start home-based businesses across a range of industries
3. Establish strong business networks and a culture of mentoring and collaboration
4. Encourage locals to support home grown businesses
5. Support and promote creative and cultural businesses

Image: Revised Draft Brookvale Structure Plan
Artist impression - Creative Hub (Winbourne Car Park)

Table 2

Innovative economy: Action Plan

Action	Influence	External Partners	Timing	Measure of Success (Internal)	External KPI	Cost
Establish a Northern Beaches Business Advisory Forum including key local businesses	Collaborate	Key local businesses	1-2 YRS	Establishment of forum	Increase number of knowledge-based businesses/jobs	 
Support people interested in starting a home-based business with clear guidelines and support programs.	Direct	Department of Planning and Environment	1-2 YR	Development of guidelines for home-based businesses and creation of a home-based business network	Increase the number of home-based businesses	
Continue to promote and expand our Business Support Service and explore opportunities to further streamline government approval processes to start or grow a business locally.	Direct	Department of Planning and Environment	1-2 YR	Continue the Business Support Service and share resources on planning pathways for businesses	Increase the number of new businesses on the Northern Beaches	
Advocate to all levels of government and the private sector for improved internet coverage to enable home-based working and support the digital economy.	Advocate	NBN Co and other providers	ongoing	Discussions with internet providers to relay business community concerns regarding internet speed/cover	Increase coverage of high-speed internet across the LGA	
Explore opportunities for more people to work from home to improve work/life balance, reduce travel demand and support local retailers.	Collaborate	Large employers	2-3 YR	Monitor trends in commuting through mobility data and worker surveys	Improve the jobs to resident worker ratio and employment self-containment rate	
Continue to support local business networks and partner with them on events and programs that foster a culture of mentoring and collaboration.	Collaborate	Chambers	ongoing	Connect with local chambers and other networks and look to partner on events	Run number of business events and maintain level of satisfaction from attendees	 
Grow and enhance the Northern Beaches Culture Map Live to showcase and connect the community with creative and cultural industries.	Direct	Local creative businesses	ongoing	Increase membership of the Culture Map Live	Increase the number of creative businesses and jobs	
Establish Brookvale as a home for innovative and creative businesses with quality professional spaces, including co-working and innovation hubs.	Collaborate	Department of Planning and Environment	4 YR +	Completion of the Brookvale Structure Plan and explore opportunities for co-worker spaces or innovation hubs	Increase the number of businesses and jobs in strategic employment centres	  
Maintain and enhance quality public area that promote the LGA's cultural identity and provide inspiring spaces for innovation and creativity.	Direct	Department of Planning and Environment	ongoing	Completion of Place Plans and delivery of projects such as the public art trail	Increase the number of creative and cultural economy businesses and jobs	 



5.4 Theme 3: Vibrant economy

Goal 3













Vibrant means town centres are thriving and inclusive for residents and visitors during the day and into the evening. People will enjoy live performances, community festivals and events. International tourism will be leveraged for business development.

Objectives

1. Create activated and pedestrian friendly town centres
2. Assist businesses in economy recovery and build their ongoing resilience
3. Encourage businesses to participate in the night-time economy
4. Spread public events across the LGA
5. Leverage the strong visitor economy to support business growth

Table 3

Vibrant economy: Action Plan

Action	Influence	External Partners	Timing	Measure of Success (Internal)	External KPI	Cost
Implement Place Plans to revitalise town centres and villages and to make them more pedestrian friendly, fill vacant shops and embed creativity in the built environment.	Direct	Department of Planning and Environment	1-2 YR	Completion and implementation of Place Plans for Avalon, Manly and Mona Vale	Increase spending and reduced vacancy in town centres	  
Continue to review policies and processes to encourage alfresco dining, live music and events in town centres.	Direct	Department of Planning and Environment	ongoing	Continue to develop programs, such as Back to Business, to increase alfresco permits	Increase spending and reduced vacancy in town centres	
Encourage residents, including those working from home, to continue to shop local and support local centres.	Collaborate	Chambers	ongoing	Run Shop Local campaigns across town centres	Increase local spending and reduce vacancy in town centres	
Investigate opportunities to increase and diversify the night-time economy, in appropriate locations, including incentives for greater business participation.	Collaborate	Chambers	2-3 YR	Run night-time activations and review planning controls	Increase spend in the night-time economy (6pm-6am) in select locations	 
Encourage an array of community and Council run events through grant programs and the creation of multi-purpose venues.	Collaborate	Destination NSW	ongoing	Increase the number and satisfaction levels with Council-run community events.	Increase spending (local and visitors) in event locations	 
Promote cultural and artistic tourism opportunities to diversify visitor experiences.	Collaborate	Destination NSW	2-3 YR	Prepare and promote collateral on cultural and artistic tourism opportunities.	Increase number of visitors and visitor nights	
Review parking provisions to support local businesses, such as motorcycle parking and P10 (i.e. 10 mins), to increase customer turnover and allow for pickup and deliveries.	Direct	Transport NSW	2-3 yr	Completion of Parking Plan to support needs of businesses	Increase visitor spending and reduced vacancy in town centres	 



5.5 Theme 4: Green economy

Goal 4












Green means we are protecting and enhancing the natural environment as we grow the economy. We will create jobs and attract investment in the green economy. Businesses will gradually become more circular in how they manage resources and reduce waste.

Objectives

1. Increase the number of businesses and jobs that are concerned with protecting or enhancing the environment
2. Encourage businesses to adopt circular economy principles by “designing out waste” and keeping resources in use for longer
3. Assist businesses in their efforts to mitigate and adapt to climate change
4. As destination managers, preserve the natural environment and leverage opportunities for eco-tourism
5. Make more sustainable transport choices and create sustainable transport systems.

Table 4

Green economy: Action Plan

Action	Influence	External Partners	Timing	Measure of Success (Internal)	External KPI	Cost
Understand the contribution of existing green jobs and businesses and investigate potential opportunities in emerging green industries.	Direct	Department of Planning and Environment	1-2 YR	Mapping of existing green jobs and businesses complete	Identify and increase the number of green jobs and businesses	 
Explore circular economy business models including repair, re-use and recycling businesses, and support for new circular economy businesses.	Collaborate	Department of Planning and Environment	2-4 YR	Research and local case studies on circular economy business practices complete	Reduction in commercial waste going to landfill	 
Expand the Sustainability Business Network by showcasing local sustainability champions and encourage new businesses to join.	Direct	Chambers	ongoing	Growth in the Council's Sustainability Business Network	Increase the number of commercial premises with solar panels and reduction in level of commercial and industrial Co2 emissions	
Continue programs to help businesses make meaningful progress towards net zero emissions and become more circular in their operations.	Direct	Local businesses and social enterprises	ongoing	Increase the number of businesses participating in Council's sustainability and waste education programs	Increase in the number of commercial premises with solar panels and reduction in level of commercial and industrial Co2 emissions	 
Encourage eco-tourism opportunities to showcase the LGA's world-class beach and bushland experiences while managing the impacts of visitation.	Collaborate	Destination NSW	1-2 years	Hosting events (such as LG NSW Destination and Visitor Economy Conference)	Number of local businesses/ organisations with eco-tourism accreditation.	
Continue to promote and encourage people and businesses to adopt low emissions travel options in their daily commute to work, including active travel and electric vehicle (EV) uptake.	Collaborate	Transport NSW	ongoing	Investment in active travel and EV infrastructure	Reduction in number of residents driving to work	  

6 Measuring success

We know that global forces can impact the local economy, which makes it a challenge to predict long-term business conditions

While many factors that shape the local economy are beyond the direct control of Council, or even the NSW or Australian governments, this strategy can point us in the right direction and assist how we plan for uncertain times.

We will use a range of indicators, both internal to Council and external to the wider community, to track how we are progressing. We will report on these indicators every two years and will review this strategy to ensure that it supports the changing needs of local businesses and can respond to new opportunities.

Theme 1: Diverse economy

We can measure the increase in local jobs that align with residents' skills using the jobs to resident worker ratio and employment self-containment rate. We can also track commercial and industrial development in strategic centres, to understand how this is building capacity for knowledge-based jobs.

Theme 2: Innovative economy

By monitoring the number of new businesses starting up on the Northern Beaches including subsectors, such as home-based businesses and creative industries. We will identify innovative businesses starting locally and emerging sectors. We will monitor the number of businesses assisted through our Business Support Service and other initiatives to help streamline council processes to start or grow a business locally.

Theme 3: Vibrant economy

Performance measures to monitor revitalisation across town centres include foot traffic counts, local spend, alfresco dining and vacancy rates. Tourism nights and spend will be key measures, as will measures around the number of, and satisfaction with, community events and public domain improvements in town centres.

Theme 4: Green economy

We will create a baseline understanding of the number of businesses and jobs engaged in the green economy to then measure our success. Where available, we will use data on commercial/ industrial Co2 emissions or the number of commercial premises with solar panels to monitor progress towards net zero. We will also measure the number of businesses participating in our sustainability and waste education programs.



7 Glossary

Affordable housing

housing that has been developed with some assistance from the NSW and/ or Australian governments, including through planning incentives.

Bricks and mortar retail

a traditional street-side business that offers products and services to its customers face-to-face.

Business park

a designated area that contains company offices and light industrial premises.

Circular economy

a model of production and consumption, which involves sharing, leasing, re-using, repairing, refurbishing and recycling existing materials and products as long as possible.

Co-working space

an environment for people from different companies who work in spaces that offer shared facilities, services and tools.

Creative and cultural sector

visual and performing arts, crafts, fashion and design, film and screen-based works, literature, digital and new media, and hybrid and new forms of creative thinking and expression.

Creative hub

a recognised area with defined borders that contains a concentration of cultural facilities and programs.

Creative enterprise

entities that have their origin in individual creativity, skill and talent, that can grow through the generation and exploitation of intellectual property.

Creative industries

businesses that use creativity and knowledge as their primary source of economic generation.

Development application (DA)

a formal request for consent to execute proposed development.

Entrepreneur

a person who sets up a business or businesses, taking on financial risks in the hope of profit.

Night-time economy

economic activity like eating and drinking or entertainment between 6pm - 9pm (evening) 9pm - 2am (night time) 2am - 6am (late night).

Gross regional product (GRP)

the market value of all the final goods and services produced in a specific time by regions.

Green economy

a low carbon, resource efficient and socially inclusive economy.

Green jobs

jobs in businesses that produce goods or provide services that benefit the environment or conserve natural resources.

Home-based business

when the home is also the principal place of business.

Industrial park

land developed as a site for factories and other industrial businesses.

Innovation

new ways to do things through changes to processes or more effective products and ideas, developing a competitive advantage and creating a culture of innovative thinking and problem solving

Key worker

someone who does a job that is important for society, for example, a nurse, teacher, or police officer and typically on a low to medium salary.

Net zero

a target of completely negating the amount of greenhouse gases produced by human activity, to be achieved by reducing emissions and implementing methods of absorbing carbon dioxide from the atmosphere.

Resilience

the capacity of individuals, communities, businesses, and systems within a city to survive, adapt and thrive no matter what kinds of chronic stresses and acute shocks they experience.

Shocks

any sudden, intense, short-term events that impact the community such as a natural disaster, pandemic or financial institution collapse.

Start-up business

a company in the first stage of its operations, often being financed by entrepreneurial founders during the initial starting period.

Stresses

slow burn issues that are systemic, interconnected and complex in nature that impact our community on a daily or cyclical basis such as housing affordability, climate change etc

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