

ATTACHMENT BOOKLET 2 ITEM: 12.1

ORDINARY COUNCIL MEETING

TUESDAY 24 SEPTEMBER 2019

TABLE OF CONTENTS

ltem	Subject			
No				

12.1 DRAFT LOCAL STRATEGIC PLANNING STATEMENT - TOWARDS 2040

Attachment 1:	Draft Northern Beaches Local Strategic Planning State	ement -
	Towards 2040	2
Attachment 2:	Technical Studies	200
Attachment 3:	Community Engagement Reports	640





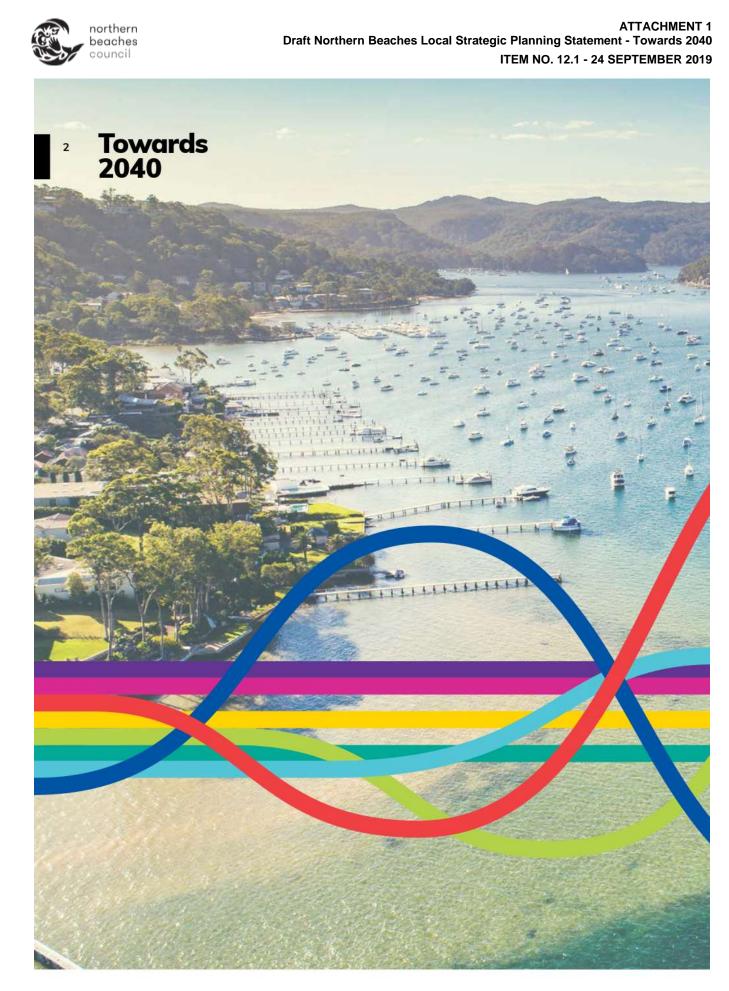
Draft Local Strategic Planning Statement



September 2019



northern beaches council





ATTACHMENT 1 Draft Northern Beaches Local Strategic Planning Statement - Towards 2040 ITEM NO. 12.1 - 24 SEPTEMBER 2019

3

Guiding land-use planning for the Northern Beaches over the next 20 years

1 16-11 ĥ

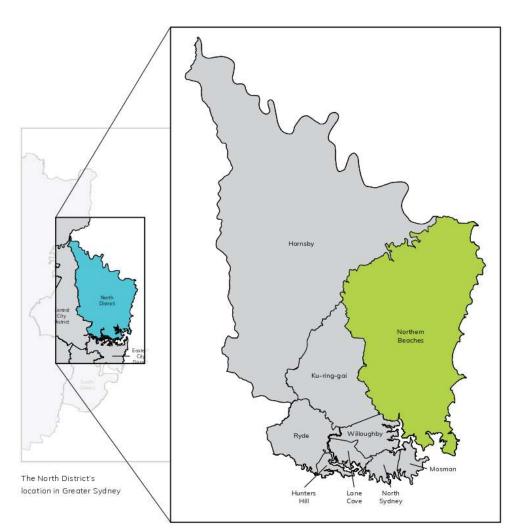


4 Disclaimer

While every reasonable effort has been made to ensure this document is correct at the time of printing, Northern Beaches Council disclaims any and all liability to any person in respect of anything or the consequence of anything done or omitted to be done in reliance upon the whole or any part of this document.

Figure 1

Metropolitan context of the Northern Beaches¹



The Northern Beaches location in the North District



Curl Curl





Content

Mayor's Message	9
About Towards 2040	10
How to read this plan	12
Strategic context	14
Future of the Northern Beaches	22
Managing growth and change	32
Landscape	36
Priority 1 Healthy and valued coast and waterways	37
Priority 2 Protected and enhanced bushland and biodiversity	46
Priority 3 Protected scenic and cultural landscapes	52
Priority 4 Protected Metropolitan Rural Area	56
Priority 5 Greener urban environments	62
Priority 6 High quality open space for recreation	66
Efficiency	70
Priority 7 A low-carbon community, with high energy, water and waste efficiency	71
Resilience	78
Priority 8 Greater community resilience to natural hazards and climate change	79

frastructure and collaboration	8
Priority 9 Infrastructure delivered with employment and housing growth	8
ople	ç
Priority 10 World-class education facilities, including a university	g
Priority 11 Community facilities and services that meet changing community needs	g
Priority 12 An inclusive, healthy, safe and socially connected community	10
Priority 13 Strong engagement and cooperation with Aboriginal communities	10
Priority 14 An artistic, creative and innovative culture	10
busing	11
Priority 15 Housing supply, choice and affordability in the right locations	11
Priority 16 Access to quality social housing and affordable housing	12
eat places	12
Priority 17 Centres and neighbourhoods designed to reflect local character and lifestyle	12
Priority 18 Protected, conserved and celebrated heritage	12



nnectivity	132
Priority 19 Frequent and efficient regional public transport connections	133
Priority 20 Sustainable local transport networks	140
Priority 21 Road space and facilities to match changing community needs	144
os and skills	148
Priority 22 Jobs that match the skills and needs of the community	149
Priority 23 Frenchs Forest as a sustainable health and education precinct	154
Priority 24 Brookvale as an employment and innovation centre	158
Priority 25 Dee Why as a thriving cosmopolitan centre by the sea	162
Priority 26 Manly as Sydney's premier seaside destination	166
Priority 27 Mona Vale as the contemporary, urban heart of the north	170
Priority 28 Safeguarded employment lands	174
Priority 29 A thriving, sustainable tourism economy	178
Priority 30 A diverse night-time economy	182

188
190
192



northern beaches council



Towards 2040

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





Mayor's Message

Like the rest of Greater Sydney, the Northern Beaches is growing. By current trends, an extra 39,000 people will call the Northern Beaches home over the next 20 years.

This draft local strategic planning statement – Towards 2040 – is our commitment to making the Northern Beaches an even better place to live in 20 years from now.

Towards 2040 is our roadmap for sustainably managing how we evolve and grow. Change is inevitable. Towards 2040 allows us to influence how it happens and plan for it responsibly.

It will help us manage future development that is true to our community's vision and in keeping with our lifestyle, environment, local character and community needs.

Towards 2040 underpins our promise to the community in Council's Community Strategic Plan, Shape 2028, to "effectively plan for future growth by balancing regional priorities with local values". We'll review this statement at least every seven years, allowing us to refine our plans and respond to our growing community along the way.

We will always keep looking ahead to address the numerous priorities we have identified in terms of housing, infrastructure, transport and connectivity, heritage, local character, community facilities and services, great places, open space, climate change and the environment.

I am grateful to the hundreds of community members who attended workshops and focus groups, completed surveys and continued the conversations we started with Shape 2028 about the future of the Northern Beaches.

We now have a living document that will evolve as our community does. Your input has been critical and will continue to be. I look forward to sharing the journey ahead with you.

Michel K

Michael Regan **Mayor**



About Towards 2040

Towards 2040 is Northern Beaches Council's local strategic planning statement. It guides land use planning for the Northern Beaches over the next 20 years.

Towards 2040 has been prepared in accordance with the requirements of Section 3.9 of the Environmental Planning and Assessment Act 1979. It will inform the development of Council's new Local Environmental Plan (LEP) and Development Control Plan (DCP), broader Council policies and strategies, and the assessment of planning proposals for changes to Council's planning controls.

Towards 2040 reflects local values and aspirations, building on the 10-year vision set out in the Community Strategic Plan, Shape 2028. It applies to the whole Northern Beaches Local Government Area (LGA).

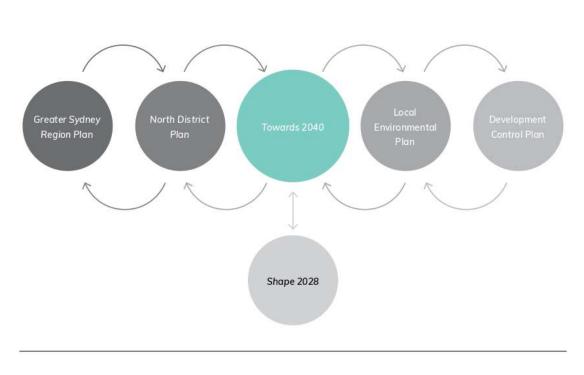
Towards 2040 includes:

- a 20-year vision
- planning priorities that guide local land use planning

- principles that underpin planning priorities and actions
- actions we will take to help achieve the priorities
- measures of success and an implementation program to determine whether priorities have been achieved.

Towards 2040 aligns with the North District Plan and Greater Sydney Region Plan and acts as the bridge between strategic land use planning at the district level and local statutory planning. Towards 2040 will be reviewed and updated at least every seven years.

While Towards 2040 is a 20-year plan it draws on data projections from the 2016 ABS Census, which are to 2036 only.



Towards 2040

Figure 2

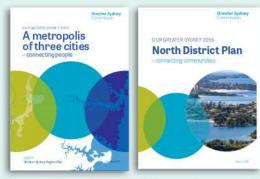
Strategic planning framework

W dr Af



How we developed Towards 2040

11



The strategic plans that guide the direction for Greater Sydney and the North District







Evidence base provided by technical studies, strategies and plans







Community engagement including surveys, strategic reference group workshops and focus groups





How to read this plan

Local context

· sets out the local strategic planning context for the Northern Beaches

Local vision and structure plan

· outlines our local strategic planning vision for the Northern Beaches

Four themes

 shape the plan based on the influences for the Northern Beaches and North District: sustainability, infrastructure and collaboration, liveability and productivity

Directions

 structure Towards 2040's priorities, principles and actions: landscape, efficiency, resilience, infrastructure and collaboration, people, housing, great places, connectivity, jobs and skills



Planning priorities

- establish focus areas to progress the Greater Sydney Region Plan and North District Plan as they
 apply to the Northern Beaches LGA
- · help achieve the local and district vision
- are not ordered in priority, as many relate to one another, requiring Towards 2040 to be read in full

Principles

are the objectives that underpin the planning priorities

Actions

- · represent initiatives and projects that specify how we will achieve the planning priority
- · are set against timeframes and the agencies we will partner with or that are responsible for implementation

Measures

· indicate how we will monitor progress towards the directions and planning priorities

Implementation

sets out how Towards 2040 will be implemented, monitored, reported and integrated with other Council strategies

Broader planning framework

The priorities, principles and actions are in addition to those in the Greater Sydney Region Plan and North District Plan. Current legislation and NSW Government-endorsed policies will also apply to projects and initiatives.



Acronyms

Acronyms	Name		
АНО	Aboriginal Heritage Office		
СНР	Community Housing Provider		
DCJ	NSW Department of Communities and Justice		
DOE	NSW Department of Education		
DPIE	NSW Department of Planning, Infrastructure and Environment		
GA	Government Architect NSW		
GBCA	Green Building Council of Australia		
GSC	Greater Sydney Commission		
Heritage DPC	Heritage - the Department of Premier and Cabinet		
MLALC	C Metropolitan Local Aboriginal Land Council		
NSROC Northern Sydney Regional Organisat of Councils with members: Hunter's H Hornsby Shire; Ku-ring-gai; Lane Cov Mosman; North Sydney; City of Ryde Willoughby			
NSWALC	NSW Aboriginal Land Council		
NSWH	NSW Health		
NPWS	National Parks and Wildlife Services		
RMS	NSW Roads and Maritime Services		
SNPHN	Sydney North Primary Health Network		
TfNSW	Transport for NSW		

Acronyms	Timing
I	Immediate imperative
S	1 - 5 year
М	6 - 10 year
L	11+ year
0	Ongoing

13



Strategic context

We expect that by 2036, more than 292,000 residents will call the Northern Beaches home. Demographic trends and projections influence planning for housing, jobs, infrastructure, facilities and other services.

The community

The Northern Beaches' population increase of around 39,000 people over the next 20 years represents 3% of Greater Sydney's growth. The population today is older than the Greater Sydney average and we expect this trend to continue. The LGA also has a distinctly lower proportion of young adults compared to Greater Sydney. This could change, provided we can address the outflow of young adults to other areas.

More than 65% of people are of European ancestry and 20% of Australian ancestry. Just half a per cent of the population identify as being of Aboriginal and/or Torres Strait Islander descent. The most multicultural suburbs are Dee Why-North Curl Curl, Beacon Hill-Narraweena and Forestville-Killarney Heights.Most of the LGA is relatively advantaged, with small pockets of disadvantage around Narraweena and Dee Why.

The environment

The Northern Beaches LGA encompasses 254km² and includes urban and natural environments that support an extensive diversity of plants, animals and microorganisms.

A mix of creeks, wetlands, lagoons, estuaries, groundwater and constructed waterways flow into coastal lagoons, beaches or into Sydney Harbour, the Hawkesbury River and Pittwater. The open coast spans over 80 kilometres, with 24 ocean beaches, aquatic reserves, intertidal protection areas and two national surfing reserves. Approximately 15,500 hectares of bushland is located in national parks, Council-managed reserves, NSW Governmentowned land, schools, golf courses and in private ownership.

The LGA boasts one of the highest urban tree canopy coverages in Greater Sydney and a diversity of open space. It includes scenic and cultural landscapes that form part of the local identity and support the local economy.

Figure 3 Population - Northern Beaches LGA (2016)

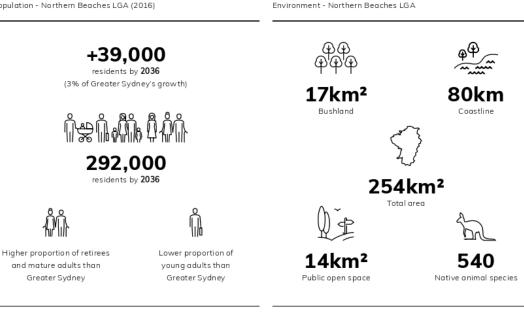


Figure 4



The Metropolitan Rural Area provides a buffer to surrounding national parks, supporting environmental conservation, Aboriginal heritage and culture, rural and employment uses and critical infrastructure.

The LGA is particularly vulnerable to natural hazards including bushfire, flooding, landslip, coastal erosion and storms. As the climate changes, exposure to natural hazards such as heatwaves, heavy rainfall, severe bushfire conditions, storm surges, sea-level rise and flooding will increase. Efforts to increase resilience in the community and natural and built environments are needed along with measures to reduce carbon emissions and increase efficiencies in managing energy, water and waste.

Housing

The majority of the LGA's approximately 101,500 dwellings are detached dwellings (around 56% of all dwellings). Based on projected population growth, we need to plan for an additional 11,265 dwellings over the next 20 years. This rate of growth is not extraordinary, representing a similar rate of growth to recent years. Our five-year housing target (2016-2021) under the North District Plan is 3,400 new dwellings. This is likely to be achieved in existing areas, with Warriewood-Mona Vale, Dee Why-North Curl Curl and Narrabeen-Collaroy accommodating most new housing in recent years.

People mainly live along the coast, shaped by access provided by Pittwater Road and reflecting a car-dependent community with limited public transport. Higher density apartment living is more prevalent in places like Dee Why-North Curl Curl, Manly-Fairlight, Freshwater-Brookvale and Narrabeen-Collaroy. In comparison, the provision of detached dwellings is greatest around Frenchs Forest and Mona Vale with semidetached dwellings the greatest in Warriewood-Mona Vale and Balgowlah-Clontarf-Seaforth.

Most households (38%) are couples with children. Single-person and group households are generally located in areas with apartments, good connectivity and higher migration rates.

Figure 5

Housing types - Northern Beaches LGA 2016





ATTACHMENT 1 Draft Northern Beaches Local Strategic Planning Statement - Towards 2040 **ITEM NO. 12.1 - 24 SEPTEMBER 2019**

П



Figure 6 Household composition - Northern Beaches LGA 2016

Figure 7 Housing target and estimated demand - Northern Beaches LGA²

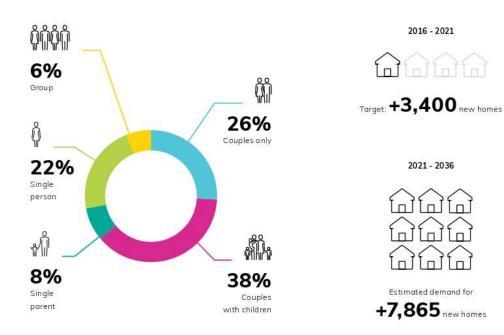
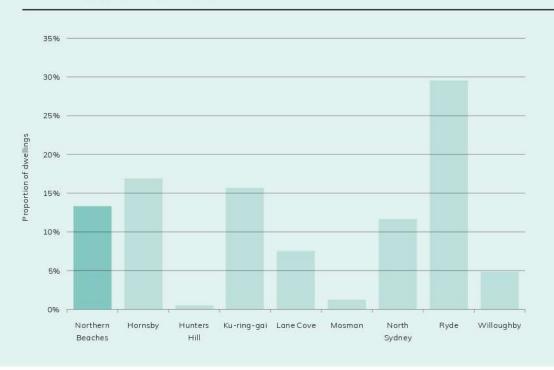


Figure 8

Five-year housing targets (2016-21) by LGA - proportion of North District target¹





Centres and places

Under the North District Plan, the LGA contains four strategic centres: Brookvale-Dee Why, Mona Vale, Manly and Frenchs Forest. Brookvale and Dee Why each has distinct characteristics and function as separate, yet complementary places. We identify them as separate centres in Towards 2040.

Mona Vale serves people in the northern end of the peninsula. With mainly low density development, it is well connected to the south via the B-Line, although access to and from other areas in the north and west is limited.

Manly is the most compact centre, with the highest concentration of social infrastructure, and good connections to the Sydney CBD via ferry. Access to other lower Northern Beaches suburbs is limited. Frenchs Forest will transition to a health and education precinct as the Frenchs Forest Hospital Structure Plan is implemented.

The LGA also includes nine local centres - Avalon, Newport, Warriewood, Narrabeen, Belrose, Forestville, Manly Vale, Balgowlah and Freshwater - along with neighbourhood or smaller neighbourhood centres such as Seaforth, Narraweena, Bilgola, Collaroy, Allambie Heights and Palm Beach.



Glen Street Theatre



Figure 9 Northern Beaches strategic centres context



Frenchs Forest

- Undergoing transformation with Northern Beaches Hospital.
- Future housing and jobs growth.
- 9,000+jobs.
- Particularly high car use.
- Highest number of workers coming in from outside LGA.
- High proportion of knowledge-intensive workers.

🔵 Brookvale

- Employment-based centre comprising a mix of industrial, retail and business.
- Most accessible centre in the LGA (based on people who can get to it in 30 minutes by public transport).
- 20,000+ jobs (including Dee Why).
- Largest employment precinct
 one third of LGA's jobs.

Dee Why

- Mixed centre comprising business, community and residential uses with a focus on civic functions.
- Largest concentration of high density living, accommodating much of the LGA's recent housing growth.

Manly

- Mixed centre comprising cultural, tourism, retail, entertainment, residential and employment uses.
- Higher density housing, more compact and least car dependent.
- Younger population base mostly working age.
- High proportion of knowledge-intensive workers and jobs, accommodating much of the LGA's recent job growth.
- 5,000+ jobs.

Mona Vale

- Employment and service centre for people living in the north of the LGA.
- 4,000+ jobs.
- Local coastal character with village atmosphere.
- High number of people with alternative working arrangements.
- A higher proportion of older people.
- Particularly high car use.



The economy

The Northern Beaches economy has an estimated value of \$16.3 billion, representing 2.9% of Gross State Product. It is the sixth-largest regional economy in NSW³. Most of the LGA's 82,700 jobs are in the strategic centres of Manly, Brookvale-Dee Why, Frenchs Forest and Mona Vale. Brookvale-Dee Why is the largest employment hub in the LGA, with a mix of industry types.

Just over half of Northern Beaches residents work locally (self-containment) and more than threequarters of local jobs are filled by people living in the LGA (self-sufficiency). However, a growing gap between job types and local skills may see more people travelling in and out of the LGA for work. Most of the LGA's jobs are in the knowledgeintensive and population-serving sectors, and the most common occupations of local residents are in the professionals and managers categories. Beacon Hill-Narraweena and Dee Why-North Curl Curl have higher ratios of industrial workers whereas suburbs with major retail outlets like Warriewood-Mona Vale and Freshwater-Brookvale have higher numbers of retail workers.

Two-thirds of residents travel to work by car and only a fifth travel by public transport. Five per cent ride or walk to work.

Figure 10

Economy - Northern Beaches LGA 2016







Figure 11

Jobs by industry - Northern Beaches LGA 2016

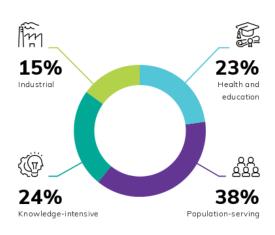
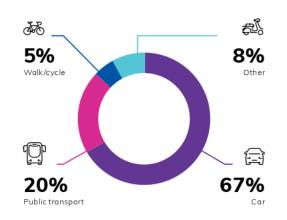


Figure 12

Journey to work by mode of transport - Northern Beaches LGA 2016

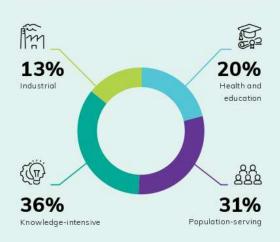




ATTACHMENT 1 Draft Northern Beaches Local Strategic Planning Statement - Towards 2040 ITEM NO. 12.1 - 24 SEPTEMBER 2019

20

Figure 13 Skills of local workforce - Northern Beaches LGA 2016 **Figure 14** Employment self-containment - Northern Beaches LGA 2016



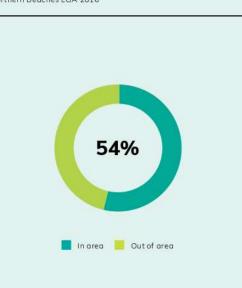
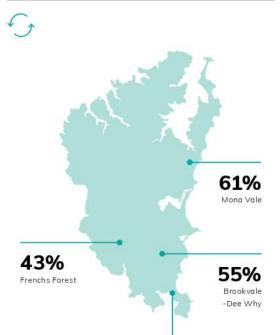


Figure 15

Employment self-containment - Northern Beaches strategic centres 2016



41%

Figure 16

Snapshot - key planning challenges for the Northern Beaches

Protecting the

environment

ihl#

Loss of urban

services land and

industrial land

Limited higher

education

opportunities





Retaining young

people

Limited public

transport







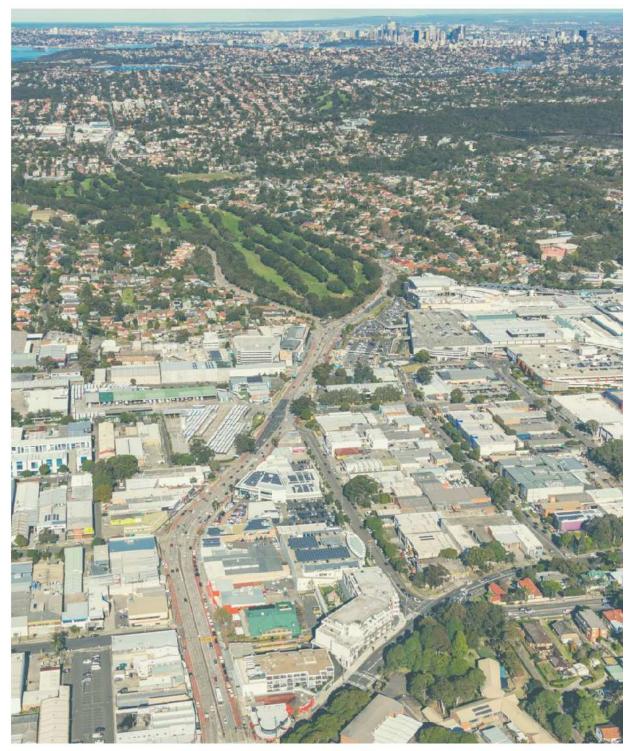
Mismatch of jobs and skills



Climate change adaptation and resilience



Brookvale





Future of the Northern Beaches

Vision

In 2040, the Northern Beaches has a stunning coastal and bushland environment, an enriched and contemporary coastal character and better connections to the North District and the rest of Greater Sydney. The natural environment is healthy and protected and highly valued by residents and visitors alike. There is a range of housing to accommodate the whole community and we continue to pursue design excellence and sustainability outcomes in built forms. It offers a thriving local economy and a sustainable mix of employment and industrial lands and vibrant and enlivened centres. The healthy and active community can easily access artistic, creative, sporting and recreational opportunities and the services and facilities that support their health and wellbeing.

Frenchs Forest is a low-carbon, high-efficiency health and education precinct with a vibrant town centre, anchored by the Northern Beaches Hospital, a high school, and state-of-the-art recreation and community facilities. By the coast, Dee Why contains a vibrant mix of business, community, civic and residential uses with new streets, parks and laneways and pedestrianised areas connecting the centre to the beach. Brookvale is an employment and innovation hub and Manly remains one of Sydney's top tourist destinations with a healthy night-time economy. Mona Vale is the urban heart of the northern peninsula's natural and coastal areas with a cosmopolitan coastal local character.

Four fast, frequent public transport corridors connect Frenchs Forest, Brookvale, Dee Why, Mona Vale and Manly to the Eastern Economic Corridor and the rest of Greater Sydney. Innovative and emerging transport technology, such as electric cars

Figure 17

Illustrative concept of the Towards 2040 vision





and autonomous vehicles, are part of the broader transport network, and with safe and convenient walking and cycling paths, more people choose to live without a car.

People live and work close to transport, making it easier for them to reach more services and opportunities within 30 minutes. New developments respond to local character, heritage and the natural environment. A diverse mix of affordable and innovative housing gives residents more choice, creating more inclusive neighbourhoods that connect people across generations.

Council champions sustainable built environments, an extensive urban tree canopy coverage, and cool green urban areas. We genuinely collaborate with Aboriginal communities and we value and celebrate the area's cultural diversity and work to ensure all people are included. The environment and community are resilient to urban and natural hazards and climate change, in part by avoiding development in rural and remote areas or areas that present risks to life and property.

The healthy and active community can easily access artistic, creative, sporting and recreational opportunities and the services and facilities that support their health and wellbeing. Our local places are welcoming to all people, regardless of their age or ability.

People are engaged in planning and decisionmaking, leading to better places and spaces that are familiar and friendly, helping people to feel they belong.







Map 1

Northern Beaches structure plan





Map 1 25 Legend Urban area Forest village Employment hub Ingleside Growth Area Coast walk Existing housing capacity 📕 National park Bondi to Manly walk Identified future housing supply . ō. Major public parkland/ Ferry routes . . bushland Regional community facilities Ferry stop 0 Education Metropolitan Rural Area (MRA) Public transport and active 🕮 Sports and recreation ۲ Strategic centre travel connection Art/culture/community Health and education precinct Beaches Link Tunnel investigation area - Primary medical facility Local centre Key transport corridor Supporting medical facility Coastal village III Future transport corridor .

Frenchs Forest

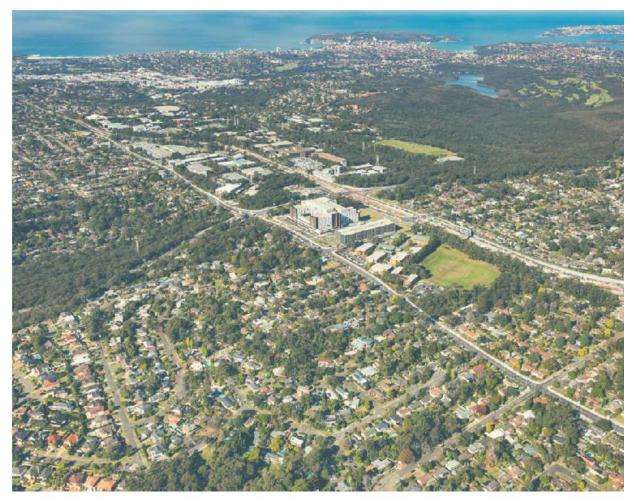
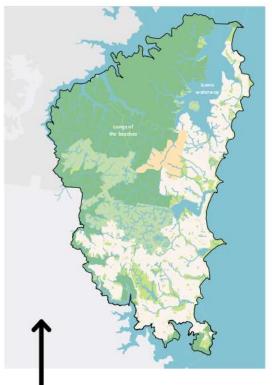






Figure 18

Spatial elements of the Northern Beaches

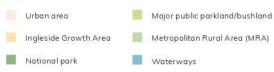




Landscape

Green urban environments and an expansive Metropolitan Rural Area connected to a network of high quality open space and healthy, protected bushland and waterways.

Legend





G

Housing

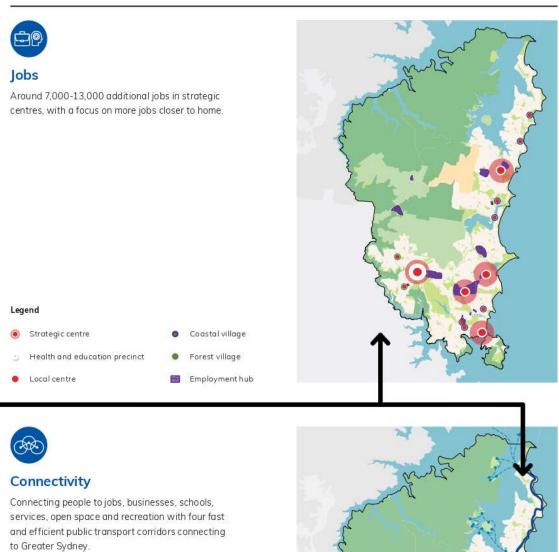
An additional 11,200 dwellings including a new strategic centre at Frenchs Forest, greater housing choice and enhanced local character in existing centres.

Legend

- Existing housing capacity
- Identified future housing supply







Legend

- Coast walk
- Bondi to Manly walk - -
- Ferry route
- Ferry stops
- Tunnel link Key transport corridor III Future transport corridor Public transport and active travel connection

Beaches Link Tunnel

investigation area





Figure 19

PI	an	on	a	pa	ge
----	----	----	---	----	----

Direction	Priorities			
a مرید Landscape	Priority 1 Healthy and valued coast and waterways	Priority 2 Protected and enhanced bushland and biodiversity	Priority 3 Protected scenic and cultural landscapes	Priority 4 Protected Metropolitan Rural Area
√∰_) Efficiency	Priority 7 A low-carbon community, with high energy, water and waste efficiency			
Resilience	Priority 8 Greater community resilience to natural hazards and climate change	ie		
Infrastructure and collaboration	Priority 9 Infrastructure delivered with employment and housing growth			
People	Priority 10 World-class education facilities, including a university	Priority 11 Community facilities and services that meet changing community needs	Priority 12 An inclusive, healthy, safe and socially connected community	Priority 13 Strong engagement and cooperation with Aboriginal communities
Housing	Priority 15 Housing supply, choice and affordability in the right locations	Priority 16 Access to quality social and affordable housing		
Great places	Priority 17 Centres and neighbourhoods designed to reflect local character and lifestyle	Priority 18 Protected, conserved and celebrated heritage		
Connectivity	Priority 19 Frequent and efficient regional public transport connections	Priority 20 Sustainable local transport networks	Priority 21 Road space and facilities to match changing community needs	
لی Jobs and skills	Priority 22 Jobs that match the skills and needs of the community	Priority 23 Frenchs Forest as a sustainable health and education precinct	Priority 24 Brookvale as an employment and innovation centre	Priority 25 Dee Why as a thriving cosmopolitan centre by the sea
Themes: O Sustainabi	lity • Infrastructure and co	llaboration 🔸 Liveability	Productivity	



Priority 5 Priority 6 Greener urban High quality open space environments for recreation Priority 14 An artistic, creative and innovative culture Priority 26 Priority 27 Priority 28 Priority 29 Priority 30 Manly as Sydney's Mona Vale as the Safeguarded A thriving, sustainable A diverse night-time contemporary, urban employment lands premier seaside tourism economy economy destination heart of the north



Immediate imperatives

Several actions identify immediate imperatives relating to technical studies that will inform how we plan for future housing, jobs and infrastructure needs. These studies will also directly inform our new Local Environmental Plan (LEP) and the subsequent Development Control Plan (DCP). We will only fully understand how best to plan for future land uses when the studies are completed. Ideally, this will occur within six months of the release of Towards 2040.

Figure 20

Studies underway to provide an evidence base for the new strategic planning framework



Planning for change across the Northern Beaches

Beyond the work of Towards 2040, we have developed a number of strategies that inform our business-as-usual activities, and our strategic planning. These are referred to throughout Towards 2040 and include:

Figure 21

Snapshot of Northern Beaches strategies and plan (endorsed and/or exhibited)



Move Transport Strategy 2038



Walking Plan



Pittwater Waterway Strategy 2038



Connected Community, Arts and Creativity Strategy 2028 (draft)



Coast Walk Public Art Strategic Plan

0

Sportsground Strategy

Other draft plans and strategies currently under preparation are referred to throughout Towards 2040.

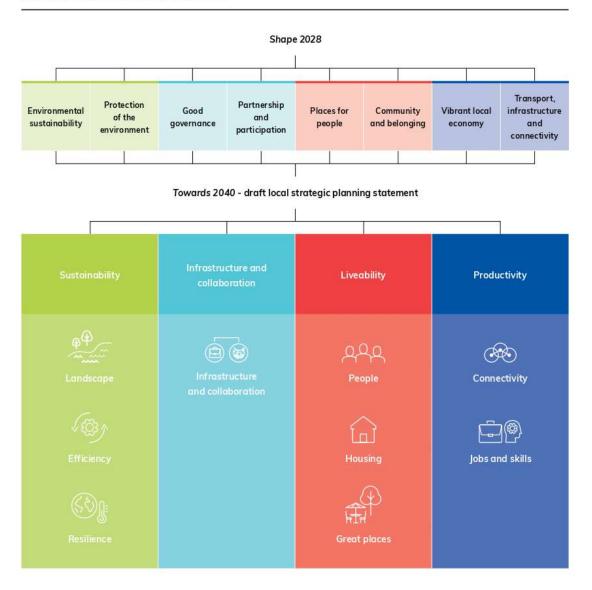


Place-based planning

We actively undertake place-based planning approaches throughout the Northern Beaches and several actions reflect this work. Place-based planning involves the community in developing master plans, public domain plans, place plans, structure plans and precinct plans. Collectively, this work leads to the implementation of new projects on-the-ground. Current work includes Avalon Place Plan, Brookvale Structure Plan and Frenchs Forest Planned Precinct. We've committed to place plans for Manly and Mona Vale in the near future.

Figure 22

Relationship between Shape 2028 and Towards 2040



Draft Local Strategic Planning Statement 2019



Managing growth and change

No immediate change is required to current planning controls to meet housing targets.

The local housing strategy will investigate opportunities for changes to the planning controls to address housing needs, such as low levels of social housing and affordable housing, as well as provision of a diversity of housing types that cater for different demographic groups.

Planning proposals seeking changes to the planning controls for additional development capacity through spot rezoning must have strategic merit and site-specific merit. In some cases, these planning proposals may have merit and contribute to targets by unlocking previously identified capacity, particularly where they also have genuine broader public benefit, as well as achieving highquality planning and urban design outcomes.

Planning proposals that simply seek additional residential density above the current controls will have challenges in demonstrating their strategic merit as they are not necessary to achieve the housing targets and the strategic direction set out in Towards 2040. Strategic principles for managing growth and change are:

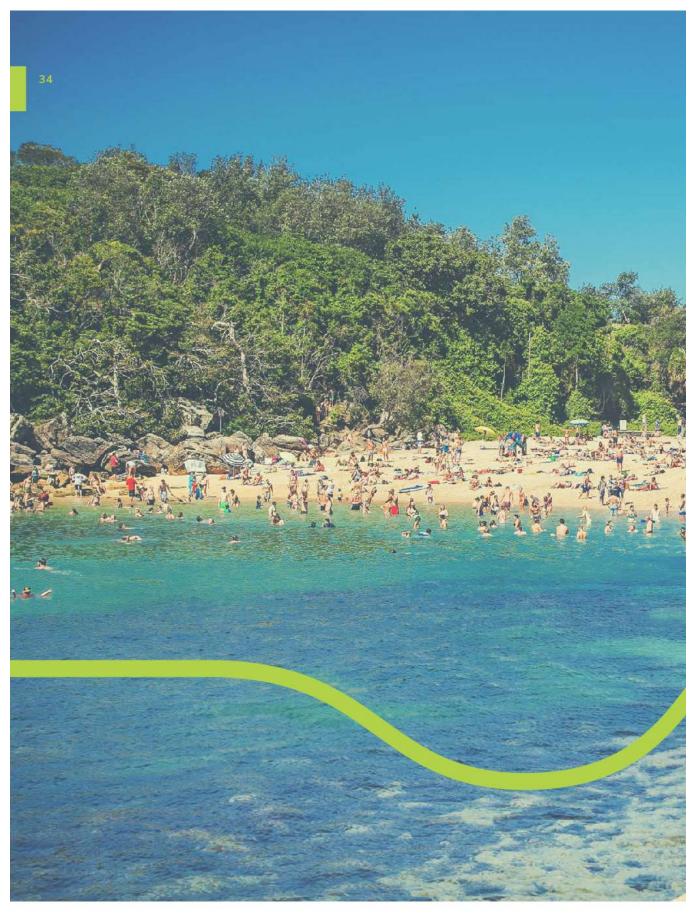
- Proposals must protect and enhance the natural blue grid and the community's environmental values and uses for the coast and waterways (P1)
- Proposals must retain native vegetation and maintain or enhance ecological functions in core areas and wildlife corridors (connection zones) (P2, P15)
- Proposals must protect public views of scenic and cultural landscapes(P3, P15)
- Proposals must not intensify urban uses in the Metropolitan Rural Area (MRA) (P4)
- Proposals must contribute to the local green grid, retain mature trees and offset tree canopy loss by planting a minimum of two trees for any one tree removed (P5, P15)
- Proposals must reduce the urban heat island effect by increasing the urban tree canopy and green cover, incorporating water sensitive urban design and improving building design (P5, P15)
- Proposals must locate development with access to open space. All new residential areas are required to be located within 400m of open space and high-density areas within 200m of open space (P6, P15)



- Proposals require a Green Star, NABERS or similar sustainability compliance rating that demonstrates improved building standards and the achievement of a low-carbon development with high efficiency in energy, water and waste (P7, P15)
- Proposals must not intensify urban development in areas where there are unacceptable risks from natural and urban hazards (P8, P15)
- Proposals must improve resilience to the impacts of climate change (P8)
- Proposals in local and strategic centres must be considered through precinct-level planning to sequence and fund growth with provision of public transport, open space and other infrastructure for the whole centre (P9, P11, P15, P19)
- Proposals must be supported by an infrastructure assessment and demonstrate that demand for the infrastructure it generates can be satisfied. This includes social and transport infrastructure (P9, P11)
- Proposals must locate development near strategic and local centres and reasonable walking distance (800m) of high-frequency public transport (P15, P19)

- Proposals must positively contribute to the built environment and result in overall better urban design outcomes than existing planning controls (P15)
- Proposals must complement local character (P15)
- Proposals must result in high amenity for occupants and not unreasonably impact on the amenity of neighbouring properties and the public domain (P15)
- Proposals must create a public benefit, such as open space, affordable rental housing and other identified infrastructure needs. A minimum 10% affordable rental housing is required for all planning proposals, with higher rates where feasible (P15, P16)
- Proposals in strategic and local centres must include an amount and type of non-residential floor space appropriate to the site's location and ensure residential development does not diminish employment or economic opportunities (P22)
- Proposals must avoid residential uses in industrial precincts and business parks (P15, P28).













Landscape

The LGA's environmental and recreational attributes are perhaps the most critical element of the Northern Beaches lifestyle.

Planning priorities

- Priority 1
 Healthy and valued coast and waterways
- Priority 2
 Protected and enhanced bushland and biodiversity
- Priority 3
 Protected scenic and cultural landscapes
- Priority 4
 Protected Metropolitan Rural Area
- Priority 5 Greener urban environments
- Priority 6 High quality open space for recreation





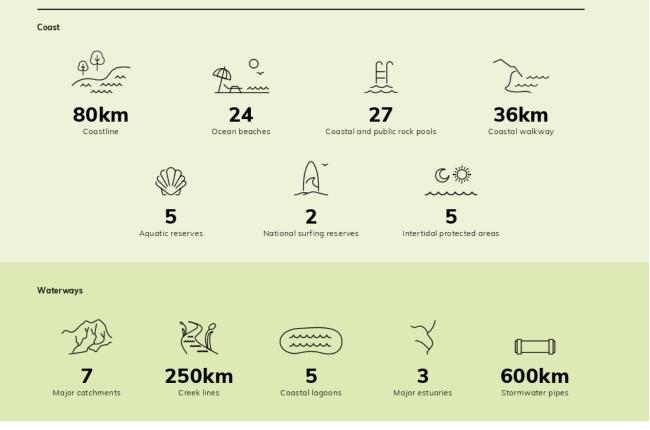


Priority 1 Healthy and valued coast and waterways 37

The Northern Beaches' coast and waterways provide habitat for Endangered Ecological Communities, migratory birds, fish, aquatic and riparian species, and marine vegetation. They cool urban areas, attract visitors and encourage people to be active. Sydney Harbour, Hawkesbury River and Pittwater support a thriving marine industry.



Key facts - Northern Beaches coast and waterways





As we move to 2040, climate change is expected to impact the coastline with more damaging coastal storms and a higher sea level. The natural flow patterns of the LGA's waterways are expected to change due to extreme flooding and prolonged periods of drought.

Developed in partnership with the former Office of Environment and Heritage, the following map articulates our proposed vision for the LGA's coast and waterways, including the areas we'll target for improvement through a pilot application of a risk-based framework.

The proposed vision draws on our understanding of environmental values and uses for each waterway, and a detailed analysis that identified the LGA's 'Natural Blue Grid' - waterways and waterdependent ecosystems with high ecological value.

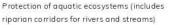
Risk-based framework pilot project

Northern Beaches Council is a pilot council chosen to implement the 2017 Risk-based framework for considering waterway health outcomes in strategic land-use planning decisions, developed by the former Office of Environment and Heritage and the NSW Environment Protection Authority. The framework is a structured approach to support decisionmaking for land and water management.

Figure 24

Community's environmental values and uses for waterways⁴







Primary contact recreation



Aquaculture and aquatic foods







Visual amenity

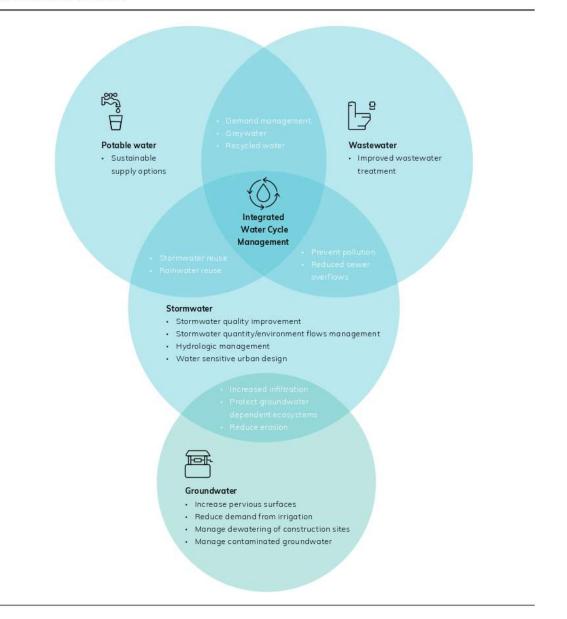
(0)



Protecting the Natural Blue Grid will maintain water quality and aquatic ecosystems while making waterways safe for low impact recreation, where appropriate. It requires us to avoid clearing vegetation on public and private land, which can contribute to increased flows, reduced water quality and loss of habitat, especially in more natural catchments such as Narrabeen Lagoon. Within highly urbanised catchments such as Dee Why, stormwater must be controlled and treated to protect waterways from excess nutrient and sediment load and increased litter. The risk-based framework pilot project, along with other technical studies, will inform new planning controls for stormwater quality, water sensitive urban design, protection of riparian areas and coastal development. This work will emphasise the need for integrated water cycle management, especially in new development areas such as Frenchs Forest to reduce stormwater runoff, sewage overflows and demand on the drinking water supply. 39

Figure 25

Integrated water cycle management

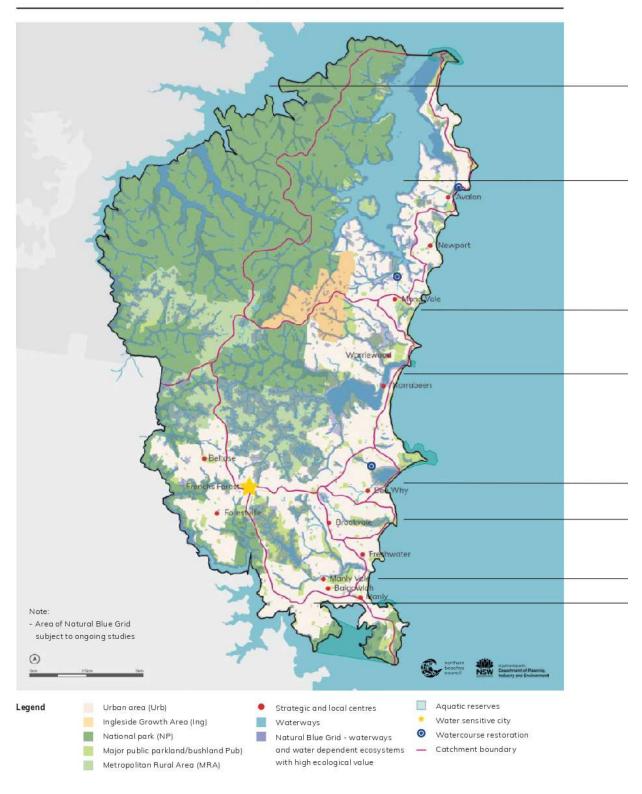






Map 2

Northern Beaches Natural Blue Grid, and associated community environmental values and uses⁵





	Hawkesbury River Catchment	
		ی کے ایک 👁 🗢
	Estuaries-Hawkesbury River and Cowan Creek	· · · · · ·
	Waterways - Urb, MRA	ଭ ଭ ଭ
	Waterways - NP, Pub	~~~
	Pittwater Catchment	8040 (0.1 NC)
		ی کے 🔿 🗢
	Estuaries - Pittwater	~~~
	Waterways - Urb, MRA, Ing	() v
10	Waterways - NP, Pub	~ ~ ~
	Coastal Catchments	
		ی کے ایک 🗢
	Ocean Beaches	~ ~ ~ ~ ~ ~
	Waterways - Urb	(
	Waterways - NP, Pub	~ ~ ~
	Narrabeen Catchment	
	5,240Ha 28% Modified	ی کے ایک 👁 🗢
	Lagoon	~ ~ ~ ~ ~ ~
	Waterways - Urb, MRA, Ing	© ~ ©
r	Waterways - NP, Pub	~ ~ ~
	Dee Why Catchment	
	426 Ha 97% Modified	👁 🗠 🚣 🌚
	Lagoon	✓ < @
	Waterways	666
	Curl Curl Catchment	
	465 Ha 99.8% Modified	ی کے ایک 👁
	Lagoon	TOT
	Waterways	TOT
	Manly Catchment	
	1,724 Ha 74% Modified	• • 4 £ 4
	Lagoon	© ~ © 1
	Dam	*****
	Waterways - Urb	~ ~ @
	Waterways - NP, MRA, Pub	~ ~ ~
-	Sydney Harbour Catchment	
		• 🗈 🛓 👁
	Estuaries	~ ~ ~ ~ ~
	Waterways	~~~

Com	munity environmental values and uses
•	Aquatic ecosystems
0	Visual amenity
≜	Secondary contact recreation
£	Primary contact recreation
٠	Aquatic foods (to be cooked before eating)
~	Maintain or improve existing condition
ø	For achievement in 5 - 10 yrs
T	For achievement in 10 yrs or more
Rive	r flow objectives
All v	vaterways and estuaries
	Protect pools in dry times
*****	Protect natural low flows
ø	Mimic natural drying in temporary waterways
	Manage groundwater for ecosystems
All E	stuaries

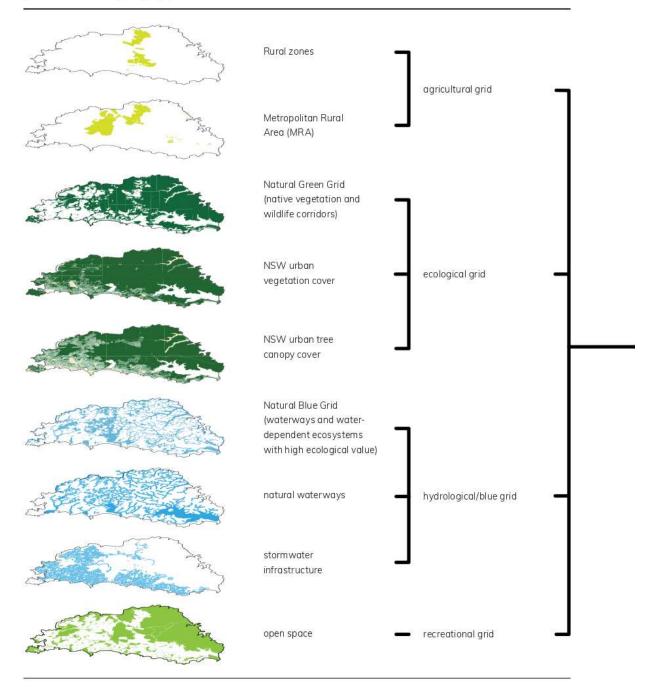
Maintain or rehabilitate estuarine processes and habitats



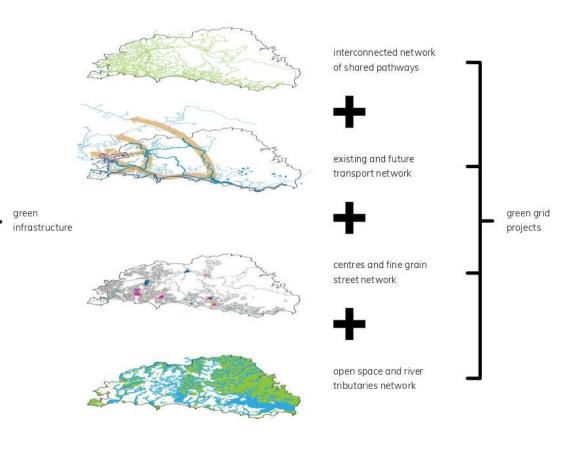
Recreational access to waterways will also be addressed in technical studies and in efforts to create a local green grid that connects with the Greater Sydney Green Grid, a long-term vision for a network of high-quality green areas across Greater Sydney (see P5). Local green grid projects will connect with Greater Sydney Green Grid projects including the Coast Walk connecting to Bondi. This work will be underpinned by the Government Architect NSW's Greener Places Policy, which aims to reconceptualise waterways as an infrastructure asset and connectors that bind communities together.

Figure 26

Northern Beaches local green grid, green infrastructure and green grid projects⁶









Principles

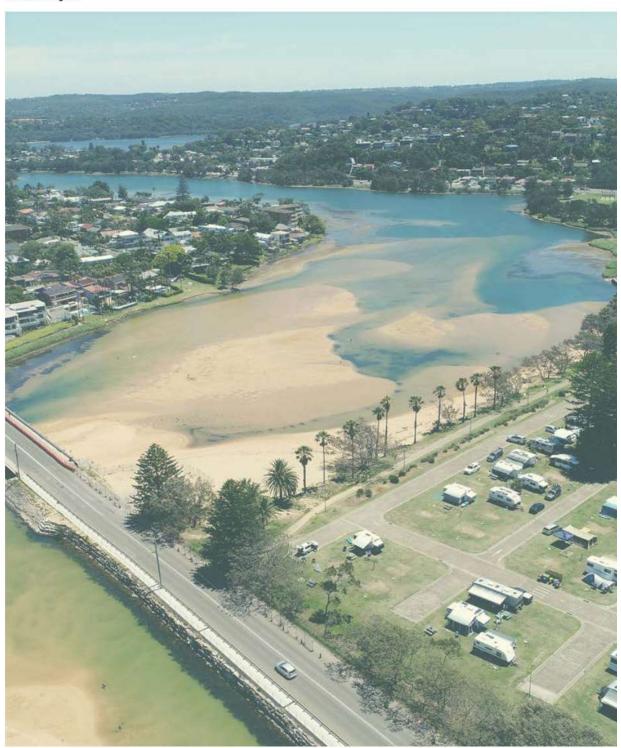
- Protect and enhance the ecological condition of coastal areas, catchments, waterways (wetlands, watercourses, lagoons and estuaries) and their riparian areas.
- Shape decisions for future water infrastructure around the implications of climate change.
- Improve the quality of water discharged to beaches, waterways, riparian areas and bushland.
- Integrate water sensitive urban design measures into the built form.

- Conserve watercourses or restore them to their natural state where possible.
- Encourage water efficiency, water re-use or alternative water sources to reduce potable water use.
- Protect and enhance sustainable recreation at beaches, lagoons, watercourses, wetlands and surrounding riparian or natural areas without compromising the integrity of environmentally sensitive aquatic and riparian habitats.

No.	Action	Time	Partner
1.1	Prepare a stormwater quality management plan to guide implementation of the risk-based framework, identify stormwater quality targets, and prioritise public and private stormwater infrastructure needs		DPIE
1.2	Prepare an environment study to inform best-practice land use responses to growth and climate change	Ι	
1.3	Develop LEP and DCP controls that incorporate the findings of the above studies, including stormwater quality targets; protection of riparian areas; coastal hazard management and criteria for environmentally friendly sea walls	I	
1.4	Prepare an open space and recreation strategy and map a local green grid that supports environmentally sustainable access to waterways where appropriate	I	DPIE
1.5	Develop our Environment and Climate Change Strategy Protect, Create, Live and associated action plans for coastal areas and waterways	S	
1.6	Prepare long-term coastal management programs for the open coast, Hawkesbury River and Sydney Harbour and supporting plans for headlands, dunes and emergency response	S	DPIE
1.7	Implement the Pittwater Waterway Strategy, including new LEP and DCP controls that cap mooring numbers at 3,641	SM	
1.8	Expand the W2 zone, subject to a strategic sites assessment, to permit, with consent, sustainable marina expansion. Marina expansion would only be considered subject to appropriate regard being given to all impacts including, but not limited to, environmental, social, economic, transport, traffic, visual and waterway navigation	М	
1.9	Investigate the feasibility of local green grid projects:	М	
	a. a continuous foreshore path around the Pittwater waterway		
	b. a new boat ramp on Pittwater to cater for medium to larger boats		
	c. naturalisation of creeks at Dee Why, Mona Vale and Avalon		
	d. new aquatic reserves for areas of high biodiversity value		



Narrabeen Lagoon







Priority 2

Protected and enhanced bushland and biodiversity

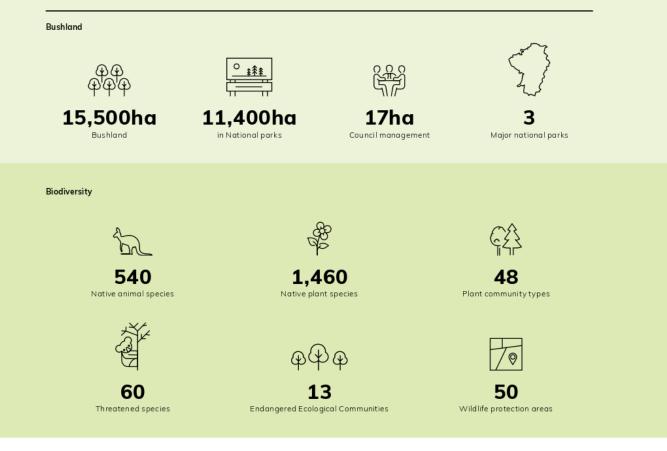
Bushland and biodiversity – including native plants, animals and ecosystems – create appealing places and landscapes and contribute to health and wellbeing. They support the Northern Beaches lifestyle, encouraging people to be active or get involved in more social opportunities. Other benefits include revenue from ecotourism, recreational fisheries and related industries.

Bushland is a form of green infrastructure which provides for the conservation of biodiversity. It also provides ecosystem services such as the provision of clean water, and habitat for a variety of plants, animals and micro-organisms, including threatened species such as the Grevillia caleyi and threatened ecological communities such as the Pittwater Spotted Gum Forest.

The LGA's bushland includes important core areas of habitat linked by connection zones (better known as wildlife corridors) as defined under the Government Architect NSW's draft Bushland and Waterways Guide. Transition areas, such as urban parks or backyards, provide a buffer that protects bushland from adjoining urban areas.

Figure 27

Key facts - Northern Beaches bushland and biodiversity





Core areas include State-managed national parks; larger Council reserves including Manly Dam and Ingleside Chase Reserve; and some private land, including one of Sydney's largest unreserved and largely privately owned areas of bushland that stretches across the Oxford Falls Valley west from Narrabeen Lagoon to Belrose and Frenchs Forest. Connection zones (or wildlife corridors) help wildlife to move between core areas and support genetic dispersal.

As we move to 2040, retaining and enhancing treasured bushland and biodiversity, including on privately owned land, will be challenged by development pressures and climate change. Biodiversity loss is already evident from the growing list of threatened plants and animals, including the local extinction of koala from the Barrenjoey Peninsula in the 1990s. Climate change will result in more extreme weather events such as storms, heatwaves and changes in rainfall patterns that will increase drought and bushfires.

Technical work is ongoing to look at ways to protect and enhance bushland and biodiversity, including the management of bushfire risk. This work will be reflected in LEP and DCP controls and support the establishment of a local green grid.

Similar to our approach to waterways, bushland will be reconceptualised as an asset for its intrinsic values and for the services it provides, including carbon and stormwater capture and pollution management. We will also increase the availability of local biodiversity offsets and aim to offset future development locally.

Figure 28

Illustrated example of Northern Beaches bushland showing core areas, wildlife corridors and transition/buffer areas

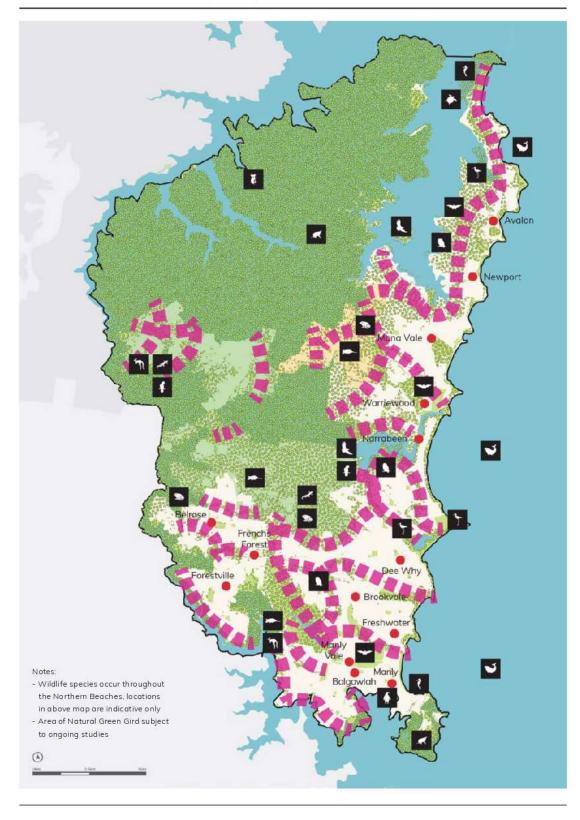




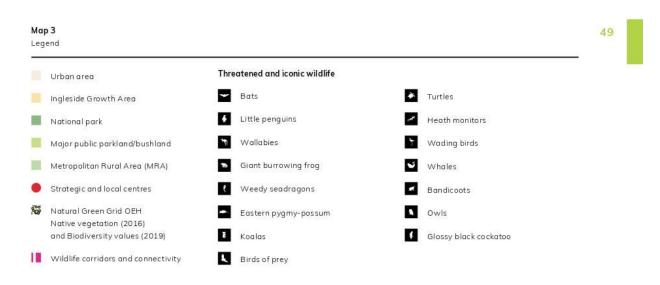


Map 3

Northern Beaches Natural Green Grid, connectivity and examples of threatened and iconic wildlife









Littoral Rainforest EEC*







Pittwater Spotted Gum EEC



Themeda Grasslands EEC



Barking Owl

EEC



Eastern Pygmy-possum



Eastern Water Skink



Red Crowned Toadlet

Sea Eagle

* EEC - Endangered Ecological Community

Draft Local Strategic Planning Statement 2019





Swamp Wallaby



Osprey





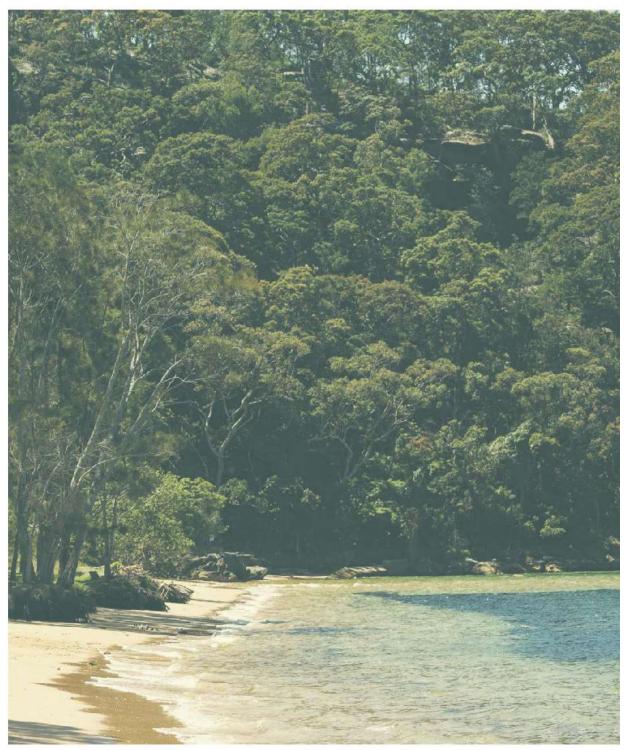
Principles

- Protect core areas and areas of high environmental value from urban development.
- Conserve and restore threatened species habitat.
- Retain native vegetation and maintain or enhance ecological functions in wildlife corridors (connection zones).
- Ensure future developments avoid, then minimise, impacts on bushland before offsetting is considered.
- Increase the availability of local biodiversity offsets.
- Shape decisions for future bushland and biodiversity management around the consequences of climate change, including the need for increased bush fire risk mitigation and pest species management.
- Plant locally native species.

No.	Action	Time	Partner
2.1	Prepare a biodiversity planning analysis to identify core, transition and connection zones (wildlife corridors) and to support a strategic urban biodiversity framework	I	
2.2	Prepare LEP and DCP controls that protect bushland and biodiversity, including the findings of technical studies; use of environmental protection zones and designating environmentally sensitive areas; and exempting the application of State policies that override local provisions	I	
2.3	Investigate a local biodiversity offset framework that meets the Biodiversity Conservation Act 2016, encourages local offsets or increases obligations when offsets are provided outside the LGA, district or bioregion	S	DPIE
2.4	Investigate biodiversity investment opportunities and establish offset lands or biodiversity stewardship sites (formerly biobank sites) on Council land where appropriate	SM	
2.5	Investigate options for funding, acquisition and reservation of bushland with biodiversity, habitat, recreational and scenic values, including incentives or assistance to private property owners	М	
2.6	Embed green infrastructure into the NSW planning system and make funding available through developer contributions, rate reductions or levies	S	DPIE
2.7	Develop Protect, Create, Live and associated action plans for bushland and biodiversity, including programs to better connect remnants of bushland	S	



Currawong







Priority 3

Protected scenic and cultural landscapes

Scenic and cultural landscapes include views to escarpments, ridgetops, bushland, coastal headlands and beaches, waterways, and buildings or skylines. They define the character of an area.

People in the Northern Beaches enjoy coastal and bushland landscapes including Ku-ring-gai, Garigal and North Head national parks, Oxford Falls Valley and Manly Dam, Pittwater and Middle Harbour and the coastline from Manly to Palm Beach. People also enjoy views to the Sydney CBD skyline or distinct buildings like Ingleside's Bahai Temple and the International College of Management in Manly.

Landscapes provide a link for Aboriginal culture and heritage from before European settlement to the present. The coastline is a place for surfing, swimming and surf lifesaving clubs and represents Australian beach culture and that of our local community. LGA-wide studies will identify the scenic and cultural landscapes that are valued by the community and how they can be protected, such as through urban and architectural design that creatively retains and uncovers public views.

Efforts to protect scenic and cultural landscapes will support a sustainable tourism economy (see P29) and a protected Metropolitan Rural Area will safeguard rural vistas and views to the adjoining national parks (see P4). The development of a local green grid will allow us to connect these landscapes through projects like the Coast Walk and celebrate their significance through artwork, storytelling and interpretation (see P5).

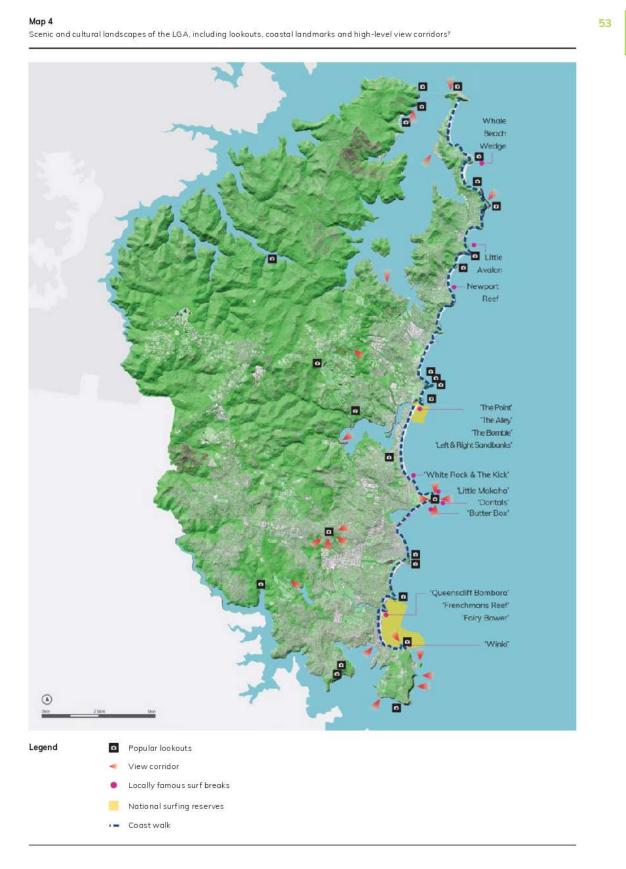
Principles

- Enhance and protect views of scenic and cultural landscapes from public areas.
- Protect areas of exceptional natural beauty and aesthetic importance.
- Make new development visually subservient to scenic and cultural landscapes.

No.	Action	Time	Partner
3.1	Prepare a scenic and cultural landscape assessment with the community to identify landscapes and their social, architectural, natural, local and regional values	I	
3.2	Develop LEP and DCP controls to protect views and scenic and cultural landscapes, such as foreshore scenic protection areas and special clauses for building heights on steeply sloping land	I	



ATTACHMENT 1 Draft Northern Beaches Local Strategic Planning Statement - Towards 2040 ITEM NO. 12.1 - 24 SEPTEMBER 2019





54 Barrenjoey Lighthouse, Palm Beach



North Steyne Surf Life Saving Club, Manly





Oceanside sculpture, Fairy Bower



Upper Gledhill Falls





Duke Kahanamoku statue, Freshwater







Priority 4 Protected Metropolitan Rural Area

The Metropolitan Rural Area (MRA) sits on the periphery of Greater Sydney's established and planned urban area and surrounding natural areas. It is a location for environmental conservation and for people to live in a coastal or rural setting among bushland, farms and other rural industries.

The Metropolitan Rural Area is also known as the **'peri-urban'**, **'non-urban'** or **'rural'** area.

In the Northern Beaches LGA, the MRA encompasses 'Rural Uplands', around Terrey Hills, Duffys Forest, Belrose North and Oxford Falls Valley that lie adjacent to Ku-ring-gai and Garigal national parks to the north of the LGA. Also included are 'Coastal Communities', including Cottage Point and places on Pittwater that can only be reached by foot or by boat, including Scotland Island, Great Mackerel Beach, Coasters Retreat, Morning Bay and Elvina Bay.

These areas support a variety of land uses, including:

- bushland and waterways that maintain air quality, water quality and scenic amenity and biodiversity habitat including the critically endangered shrub Grevillea caleyi and the Duffys Forest Endangered Ecological Community
- connections to Aboriginal heritage and culture including significant Aboriginal heritage sites and potential economic opportunities on land owned by the Metropolitan Local Aboriginal Land Council (MLALC) (see P13)

- rural land that supports rural and lifestyle properties, small scale or urban agricultural enterprises, nurseries, an equine industry and urban services such as landscape supplies
- recreational and tourism uses, including bushwalking, mountain-biking, target shooting and horse-riding including the Terrey Hills Duffys Forest Bridle Trail
- employment areas including the Austlink Business Park, Terrey Hills village and Tepko Road industrial estate
- critical infrastructure, including three satellite telecommunication facilities and the Sydney East (electricity) substation
- waste management, including the Kimbriki and Belrose resource recovery centres
- infrastructure and services that support Coastal Communities including the public wharves and ferry services and the Church Point and Barrenjoey Road-Palm Beach neighbourhood centres.

Under the North District Plan, further urban development is not consistent with the values of the MRA – this constitutes a clear State-level direction to avoid housing growth in these areas. Beyond the MRA identified in the North District Plan, we have identified Belrose North as part of the MRA; while we note it includes the Austlink Business Park, which is urbanised, it is surrounded by rural zones and national park. Ingleside may be included in the MRA depending on bushfire investigations (see P15).



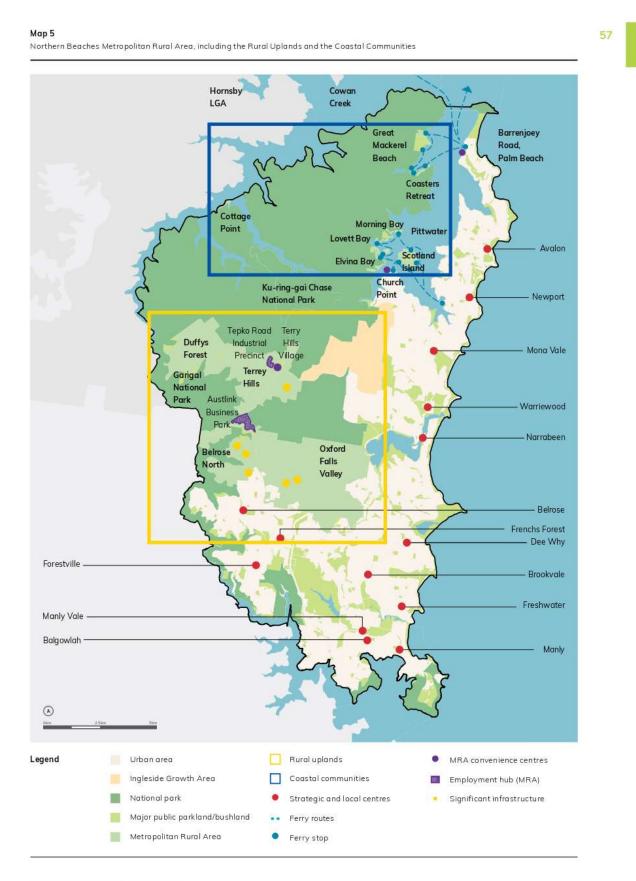






Figure 29

Illustrative map – Coastal Communities of the Northern Beaches MRA

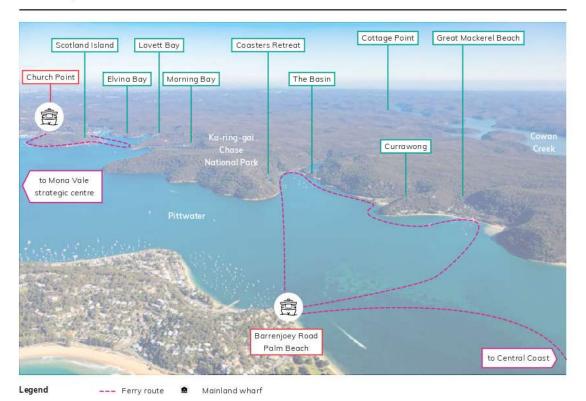


Figure 30

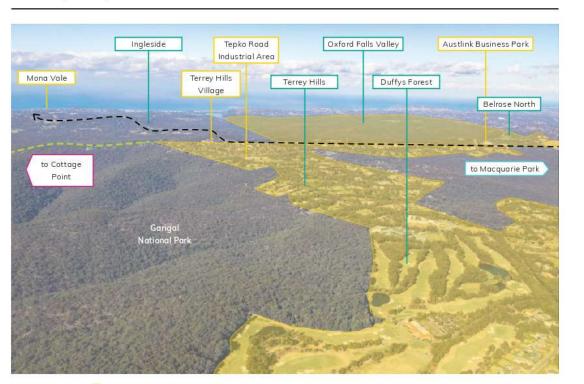
Key facts - Coastal Communities of the Northern Beaches MRA^a

(total area - 108 Ha)		
	107	Bushfire prone land
	95	Environmental protection zone
	84	Private lands
	8	Public lands
	0	Rural zone
	91	Native vegetation
		的。 2% assistance
	greater propo	107 95 84 8 0 91



Figure 31

Illustrative map – Rural Uplands of the Northern Beaches MRA



Legend

Figure 32

Key facts - Rural Uplands of the Northern Beaches MRA^a

Areas by Ha	(total area - 2,971 Ha)		
		1,708	Area deferred
		2,476	Bushfire prone land
		2,022	Private lands
		800	Public lands
		836	Rural zone
		2,092	Native vegetation
People			
D 1,976 dwellings O 93% dwellings	greater propor of retirees	tion	(111 10% need assistance

Metropolitan Rural Area



Not all properties within the MRA have access to reticulated water or sewage; improvements to septic tanks, connections to water or sewer or other alternatives are needed to manage environmental impacts. Coastal communities rely on areas outside their communities for goods, community and retail services and waste removal. While these issues are managed now, sustainable solutions are required, especially in peak seasons and as visitation increases.

Environmental attributes on public lands are mostly protected from development, yet conservation on private land remains a challenge. Opportunities to protect and enhance the MRA's environmental attributes include:

- preventing further lot fragmentation which may constrain long-term opportunities for conservation (with smaller lots creating barriers to consolidation)
- using biodiversity offsets, other funding incentives and stewardship agreements for environmental projects
- revegetating streams, planting trees and improving habitat, biodiversity and amenity
- drawing on privately initiated actions or targeted incentives such as Landcare grants, volunteering or other environmental funds
- setting appropriate land use rules and regulations to manage development.

Of the land owned by the MLALC, we will be guided by the principles established in the Aboriginal Land Rights Act 1983 to work with the MLALC, surrounding landowners and the community to balance environmental and rural needs with economic participation and cultural use of the land by Aboriginal people (see P13).

Deferred lands

Oxford Falls Valley and Belrose North are known as 'deferred lands' as they are still subject to planning controls from the former Warringah Local Environmental Plan 2000 (WLEP 2000). The Oxford Falls Valley and Belrose North Strategic Review informed a draft planning proposal that recommended the majority of this area be zoned for environmental protection, with smaller areas dedicated to either rural or residential zones (large lot or low density housing).



Principles

•	Protect biodiversity values for riparian corridors and areas that support threatened species, communities and populations and on lands				
	identified for biodiversity connectivity. in the MRA.		Avoid urban intensification and subdivisi in the MRA.	on	
•	Support sustainable primary industry, particularly food production, and prevent incompatible land uses.	•	Conserve and enhance the scenic ameni tourism and recreation values of the MR/		
•	Support biodiversity offsets and stewardship agreements.	•	Provide adequate public open space and recreational activities to avoid unsustain pressure on national parks.		
No	. Action			Time	Partner
4.1	. Use the employment study, social infrastructur biodiversity planning analysis, stormwater qua strategy and destination management plan to	ality	strategy, open space and recreation	S	
4.2	Develop LEP and DCP controls, considering re- proposal for the deferred lands of Oxford Falls land use conflicts that compromise the rural ar regard for the outcomes of the housing, emplo	Val nd e	ley and Belrose North, addressing nvironmental values, and having	I	
4.3	Investigate commercially and environmentally water and sewerage infrastructure improveme			М	Ausgrid, Sydney Water, Landowners
4.4	Prevent the inappropriate application of State of the MRA, such as site compatibility certifica	· · ·		S	DPIE
4.5	dentify opportunities for recreation as outlined	d in	P6	S	DPIE





Priority 5

Greener urban environments

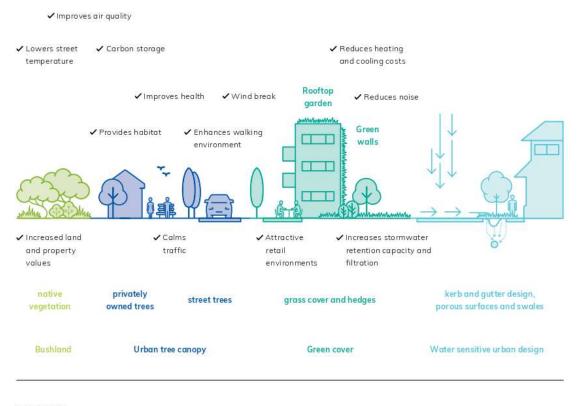
Tree coverage and greenery in the Northern Beaches contribute to the area's streetscape, character and standard of living. As a fundamental characteristic of the natural landscape, it will be retained to help manage gradual temperature increases, heatwaves and urban heat island (UHI) effect. As we move towards 2040, we will increase the urban tree canopy and green cover and develop a local green grid. Measures to address UHI are also addressed in P1 and P7.

Urban heat island (UHI) effect

Treeless urban areas generally have higher temperatures than the surrounding vegetated non-urban areas¹⁰, which give them an island appearance in heat maps, thus the name. A UHI is often associated with extreme heatwaves that can increase demands for energy, water and health services. Often, more vulnerable people, including the elderly, the very young, the infirm and the economically disadvantaged, suffer the most in these conditions.

Figure 33

Benefits of the urban tree canopy and measures to address the urban heat island effect⁹





Urban tree canopy and green cover

Although the Northern Beaches has one of the highest tree canopy coverage rates in Sydney, rates of loss are also high due to the aging of mature trees and a demand for larger detached dwellings, secondary dwellings and urban and infrastructure developments. State planning controls that allow clearing for bushfire protection and development with increased footprints also contribute.

The urban tree canopy includes a variety of tree types and is a key form of green infrastructure most effective at combatting the UHI effect. It is complemented by other forms of green cover including hedges, grass footpaths and garden beds, green roofs and walls. Water sensitive urban design measures also cool urban environments such as bio-retention, water quality ponds, raingardens and swales (see P1).

A number of studies, including Council's draft Urban Tree Canopy Plan, and the principles of the Greener Places Policy will guide our efforts to increase the urban tree canopy and green cover. We will develop urban tree canopy targets and focus efforts to reduce the UHI effect in urbanised areas such as strategic centres, industrial areas and Pittwater Road. We will implement our program to plant 5,000 trees per year and manage illegal tree clearing on private land through enforcement and compliance activities.

Greater Sydney and local green grid

The Greater Sydney Green Grid is the NSW Government's long-term vision for a network of high quality green areas that connect town centres, public transport networks and major residential areas. It is made up of four layers of green infrastructure (or grids): the hydrological or blue grid (see P1), the ecological grid (see P1 and P2), the recreational grid (see P6) and the agricultural grid (see P4).

In the Northern Beaches, priority Greater Sydney Green Grid projects include:

- recreational access improvements to coastal lagoons
- links from the Northern Beaches Hospital Precinct to Narrabeen Lagoon
- the Coast Walk from Palm Beach to Manly
- establishing street trees and increased building setbacks along Pittwater Road.

These projects are subject to feasibility and environmental assessment. We do not support recreational access to Dee Why Lagoon, identified in the North District Plan, due to its status as wildlife refuge.

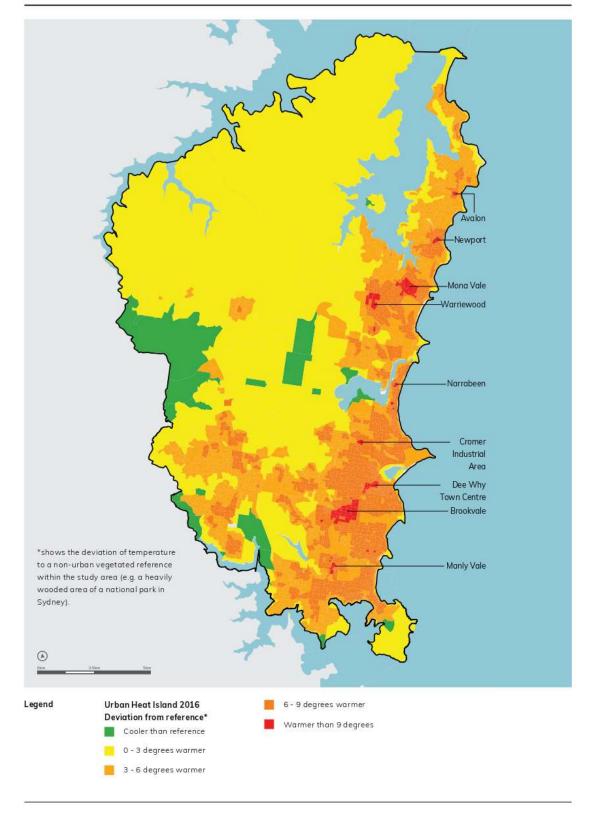
We will identify, create and protect a local green grid through the planning system to complement the Greater Sydney Green Grid and expand connections such as tree-lined streets, bushland corridors, waterways, parks and open spaces.





Map 6

Northern Beaches Urban Heat Island¹¹





Principles

- Create a resilient, interconnected urban tree canopy across the Northern Beaches.
- Retain mature trees and use innovative measures to do so for new infrastructure and development.
- Improve tree health and diversity and use local native tree species where possible.
- Offset tree canopy loss by planting a minimum of two trees for any one tree removed from public and private land.

- Incorporate other forms of green cover where space for trees is limited.
- Reduce the urban heat island effect by increasing the urban tree canopy and green cover, incorporating water sensitive urban design and improving building design
- Ensure new development contributes and connects to the local green grid.

No.	Action	Time	Partner
5.1	Implement the Urban Tree Canopy Plan, including the protection of iconic trees and tree-lined areas	S	
5.2	Investigate area and land use-specific tree canopy and green cover targets, based on the Government Architect NSW's proposed targets, prioritising areas with low canopy cover, socio-economic disadvantage and high levels of urban heat	I	
5.3	Develop LEP and DCP controls for urban tree canopy and urban heat, including deep soil requirements, landscaped open space and increased front building setbacks in narrow road corridors	I	
5.4	Prepare design guidelines to inform LEP and DCP controls, including requirements for roof colours, wind circulation, green roofs, green walls and water sensitive urban design	I	NSROC
5.5	Investigate the feasibility of Greater Sydney Green Grid projects, identify a local green grid, and protect and enhance these grids in the new planning framework	S	GA DPIE





Priority 6

High quality open space for recreation

Sport and recreation, as a central part of the Northern Beaches lifestyle, requires easy access to open space that supports leisure for fun, relaxation or fitness. The LGA's open space is a key form of social infrastructure (see P11) that forms the recreational grid and includes:

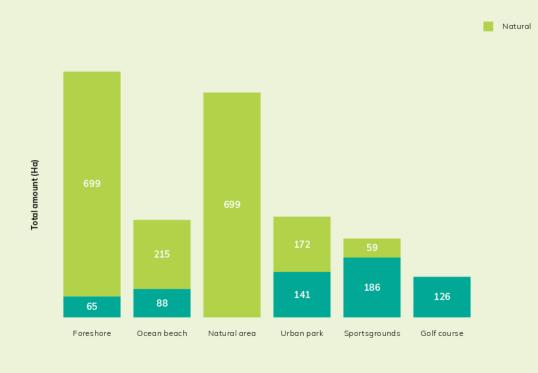
- natural areas that are primarily protected for conservation but also serve secondary recreational uses including walking, cycling, horse trails and picnic areas
- ocean beaches and foreshores either developed for recreation or with natural areas like dunes or riparian vegetation
- urban parks for active, outdoor and recreation activities with some containing natural areas like habitat reserves

- sportsgrounds for organised sport including courts and greens, with some containing natural areas
- golf courses that are Council-owned and constitute public open space.

While the Northern Beaches' natural areas provide opportunities for recreation, forward planning must provide formalised parks and sporting areas in response to urban populations. Safe and walkable access to open space must also be considered, with benchmarks provided in the North District Plan.

Figure 34

Summary of open space on the Northern Beaches, excluding national parks¹²





Map 7

Northern Beaches open space¹²

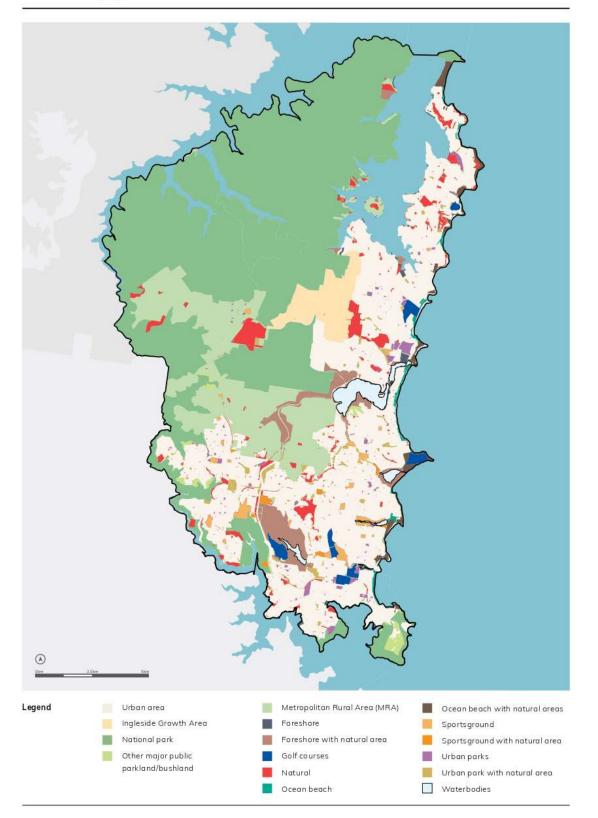




Figure 35

Top 15 sport and recreation activities for residents in NSW¹²

2% Touch football
3% Basketball
3% Cricket
3% Pilates
4% Surfing
5% Golf
5% Yoga
5% Tennis
6% Bush walking
7% Football/soccer
10% Cycling
15% Athletics, track and field (includes jogging and running)
17% Swimming
35% Fitness/gyms
44% Walking (recreational)

With limited resources and land for open space, we need to seek maximum return from investment by planning for flexible open space that responds to trends such as more individualbased activity (walking, swimming, athletics or cycling) or demographic changes (for example, from part-time workers, retirees or families). Present estimates predict a 40-hectare shortfall of land for sport by 2031 and demand on regional open space, such as beaches, will increase.

In addition to implementing the Northern Beaches Sportsgrounds Strategy (2017) and planning for new open space in Frenchs Forest Planned Precinct, further LGA-wide studies will identify innovative and collaborative solutions to address competing demands. These include:

 conversion of single-use open space: by creating multi-functional spaces to increase sport and recreation use of golf courses, Crown land and schools, as identified in the Sportsground Strategy

- disposal of assets: selling underutilised assets to enable investment in new open space and facilities
- value capture: exchanging the uplift achieved through development for public open space
- innovative models and partnerships: facilitating shared use of existing public and private facilities or partnering with the private sector to build new sporting facilities
- improving access to natural open space and the local green grid: formalising trails and infrastructure in natural areas subject to environmental assessments
- public and green space in built-up areas: considering strategies such as rooftop parks and sports courts, plazas, wide street verges and the conversion of road space, especially in areas of under-supply such as Brookvale and Dee Why.



Principles

- Improve the provision, diversity and quality of open space for recreation.
- Design open space to be flexible, versatile, multifunctional and fit for purpose.
- Ensure open space responds to demand and meets diverse community needs.
- Use open space to connect people to nature.
- Ensure new open space contributes to, connects and enhances the local green grid.
- Design sustainable open space that considers lifecycle costs, management and maintenance.

- Encourage collaboration and partnerships to promote shared use.
- Support rooftop parks, increased building setbacks and conversation of road space in built-up areas.
- Design vibrant, accessible and interactive open spaces.
- Ensure access to natural open space and waterways is sustainable so that these areas are preserved for the future.
- Locate all new residential devopment within 400m of open space and all high density areas within 200m of open space.

No.	Action	Time	Partner
6.1	Prepare LGA-wide studies including a social infrastructure and open space study and an open space and recreation strategy	I	
6.2	Develop LEP and DCP controls that respond to the findings of the above studies and improve open space provision, connect to the local green grid, and manage conflicts including the use of environmental protection zones for natural open spaces	I	
6.3	Implement the Sportsground Strategy by reallocating grounds to maximise use; facilitating shared use of school fields; and upgrading selected sports grounds either through reconfiguration, drainage and lighting improvements and/or synthetic fields	S	DOE
6.4	Deliver new open space in Frenchs Forest Planned Precinct (see P23)	М	DPIEDOE
6.5	Investigate the provision of sports fields in new housing development areas including Warriewood Valley and potentially Ingleside	S	DPIE





Efficiency

Reducing emissions requires new approaches to managing growth and development and increased efficiencies in managing energy, water and waste.

We will improve environmental standards and compliance in new and existing developments and support the global push for net zero carbon buildings. We will explore and invest in technologies and processes such as renewable energy and waste management that deliver long-term environmental benefits.

Planning priority

Priority 7 A low-carbon community, with high energy, water and waste efficiency







Priority 7

A low-carbon community, with high energy, water and waste efficiency

The Northern Beaches LGA emitted almost two
million tonnes of greenhouse gas emissions from
electricity (56%), transport (29%), waste (8%)
and gas (7%) in 2016- 17^{13} . In the same year,
almost half of the LGA's water supply (46%)¹³,
sourced by remote dams and treated to drinking
water standards, was used for non-drinking uses
such as toilet flushing, laundry and irrigation.Land
carbon
carbon
carbon
carbon
carbon
carbon

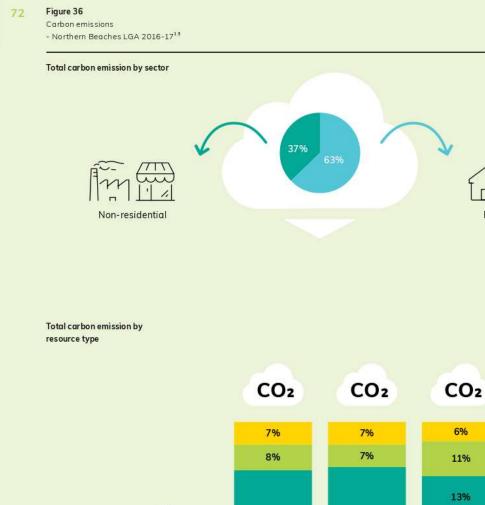
Land use and the built environment contributes to carbon emissions and water use as it influences how people live, move and use resources. Residential dwellings contribute to the majority of the LGA's carbon emissions (63%), mainly from electricity and transport. Average emissions and water-use per dwelling are lower in higher density areas in Manly, Dee Why and Narrabeen compared to areas with detached housing. 71

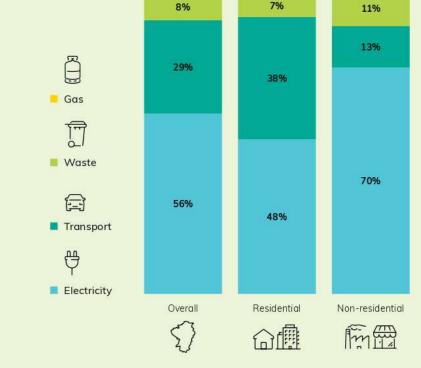
Source hydropanels, Currawong



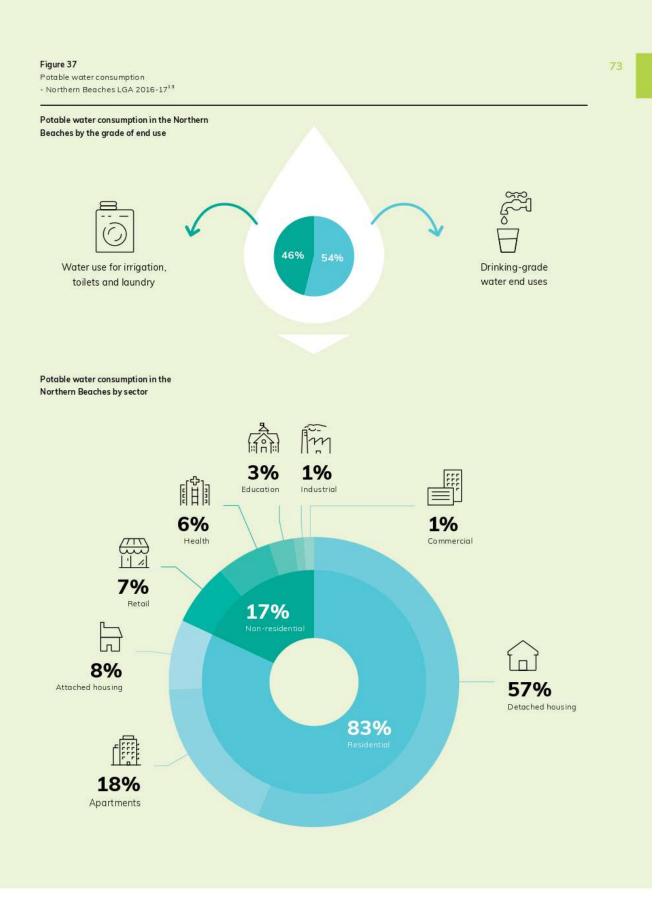


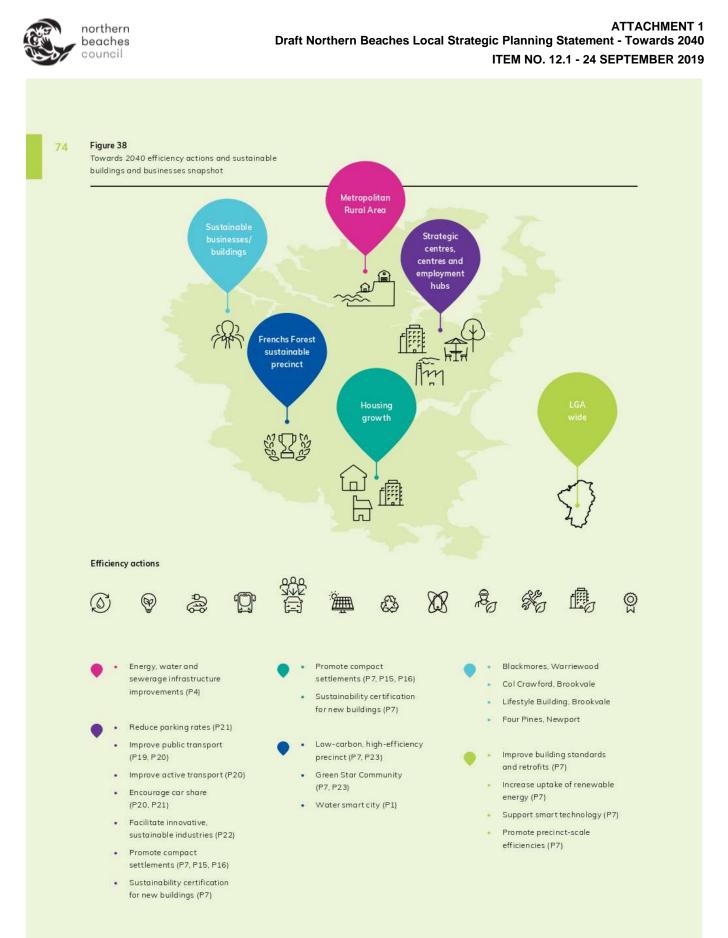
Residential













We want to be a leader in sustainable resource use; our new LEP and DCP must encourage efficiencies, especially in the built environment. Opportunities include:

- precinct-scale efficiencies such as using renewable energy across multiple buildings; consolidating freight, waste collection, re-use and recycling facilities (see P21); or introducing stormwater harvesting and wastewater recycling (see P1)
- more compact settlements including walkable suburbs serviced by public transport to reduce reliance on private vehicles and transport emissions (see P15 and P19-21)
- smart technology and infrastructure to improve energy, water, waste and transport efficiencies, such as smart energy management systems, smart bins, and shared transport including car share, e-bikes or autonomous vehicles
- improving building standards and retrofits through passive design and infrastructure such as renewable energy and storage capacity; dual reticulation for recycled water; electric vehicle charging; carbon neutral products; adaptable car parking; and measures to address UHI including green cover and reflective materials (see P5).

We are advocating for a Green Star Communities rating for planned precincts, such as Frenchs Forest, as new developments provide the greatest opportunities for change. We will prioritise lowcarbon, high-efficiency precincts in strategic centres, employment hubs, and areas subject to urban intensification in the short term, as densely populated suburbs provide the best opportunities to reduce emissions.

We will be guided by commitments in Protect, Create, Live, including projects and programs to educate the community and encourage retrofits. Aspirations in Move will guide a reduction in transport emissions. We support the global Net Zero Carbon Buildings Commitment and will work with the NSW Government to introduce improved building standards. We have measured, the community's baseline carbon emissions and water profile and will continue to monitor progress.

Northern Beaches Council as a sustainability leader

- Bronze partner of the NSW Government's Sustainability Advantage program.
- Lighting upgrades at buildings, car parks and sports fields, heating and cooling system upgrades.
- Solar power installations on Council buildings, including Cromer and Balgowlah depots.
- Low-energy LED residential streetlights that reduce carbon emissions by 3,000 tonnes a year.
- Smarter, greener, safer, cleaner waste collection service that reduces emissions by 43,200 tonnes a year.
- Cromer Park Water Harvesting Scheme, recapturing and treating water through a bio-retention system and UV filtration then using it for irrigation, capturing herbicides and fertilisers on site.
- Setting an ambitious target for half of all homes to be powered by solar by 2030.

Net Zero Carbon Buildings Commitment The global Net Zero Carbon Buildings Commitment requires building owners, occupants, cities and states to create an energy-efficient built environment, powered by renewables, and to support decarbonisation of the grid. It recognises that technology exists to achieve net zero carbon buildings and supports the Paris Agreement, the World Green Building Council, C40 and the Climate Group, as part of the We Mean Business Coalition and the Green Building Council of Australia.



Principles

- Ensure new developments and retrofits demonstrate improved building standards and the achievement of a low-carbon development with high-efficiency in energy, water and waste.
- Reduce carbon emissions.
- Support precinct-based efficiency initiatives.
- Reduce the volume of waste and waste transport requirements.
- Support smart technology and infrastructure.
- Increase the uptake of renewable energy.

No.	Action	Time	Partner
7.1	Deliver Frenchs Forest Planned Precinct as a low-carbon, high-efficiency precinct and a Green Star Community (see P23)	SML	DPIE DOE
7.2	ldentify opportunities for precinct-scale efficiencies, compact settlements, smart technology and infrastructure and better building standards and retrofits in the environment study, employment study and local housing strategy	I	
7.3	Develop LEP and DCP controls based on the studies and require a Green Star, NABERS or similar compliance rating for new buildings in strategic centres, employment hubs and areas subject to urban intensification	I	
7.4	Improve building standards for residential and non-residential buildings and relevant infrastructure, support the push for net zero carbon buildings, and monitor progress	S	DPIE GBCA
7.5	As part of Protect, Create, Live and Move, develop action plans for public transport, sustainable living and green neighbourhoods	SML	
7.6	Investigate the establishment of Australia's first Urban Night Sky Place in Palm Beach, addressing public lighting, light pollution and energy consumption	S	





Northern Beaches new waste collection service







Resilience

Resilience to natural hazards is becoming increasingly important as the climate changes.

We will continue to improve natural hazard management and mitigation activities and focus on disaster risk reduction to protect people's lives and property, the economy and the natural environment.

Planning priority

Priority 8 Greater community resilience to natural hazards and climate change.







Priority 8

Greater community resilience to natural hazards and climate change

The Northern Beaches is vulnerable to natural hazards as a result of past planning decisions and its interface with the natural environment. These hazards include bushfire, flooding, landslip, coastal erosion and storms. Recent examples include the 1994 bushfires in Terrey Hills, Ingleside and Elanora Heights, and the 2016 east coast low and king tide that caused severe damage and coastal erosion at Collaroy, power outages and the evacuation of residential properties.

As the climate changes, exposure to natural hazards will increase. Heatwaves, heavy rainfall and severe bushfire conditions are already more frequent and more intense. Storm surges, sea-level rise and increased flooding will affect properties and infrastructure along the coast.

Protect, Create, Live outlines our commitment to build resilience in the community and natural and built environments. We collaborate with several partners to lead best practice incident management and awareness.

The new LEP and DCP will incorporate natural environment protections and shape the built environment to foster connected and sustainable communities that are not only resilient to natural hazards but also urban shocks and stresses, such as pollution, disease, cyber or terror attacks and social unrest. Resilience¹⁴ is the capacity of individuals, communities, businesses and systems to survive, adapt and thrive no matter what kinds of chronic stresses and acute shocks they experience.

Chronic stresses include homelessness and housing affordability, lack of access to public transport, family violence, climate change, structural inequity, and chronic food and water shortages.

Acute shocks are sudden, shortterm events like major storms, floods, bushfires, heatwaves, disease outbreaks, terrorism or cyber-attacks.

Existing projects

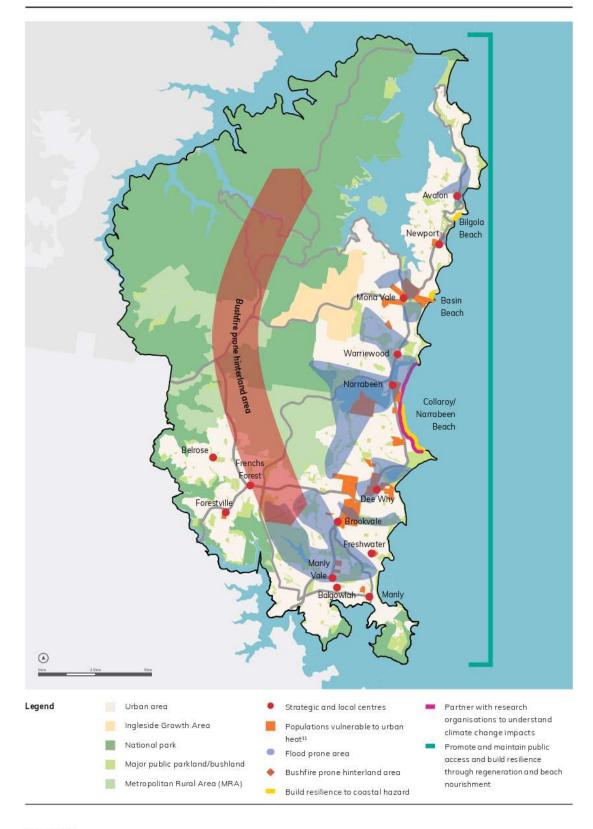
- Applying the Australasian Inter-Service Incident Management System (AIIMS) in collaboration with emergency services and relevant agencies.
- Delivering the Australian Storm Wave Damage and Beach Erosion Early Warning System in collaboration with the University of NSW and Bureau of Meteorology.
- Educating and engaging the community through the Get Ready Northern Beaches awareness program with the Department of Planning, Infrastructure and Environment.
- Coast and waterway projects including lagoon entrance management, sand nourishment, dune restoration and the Collaroy/Narrabeen sea wall to build coastal resilience.
- Incorporating the Frenchs Forest Climate Adaptation Plan and other strategic and structure planning activities in place planning.





Map 8

Northern Beaches resilience to natural hazards and climate change



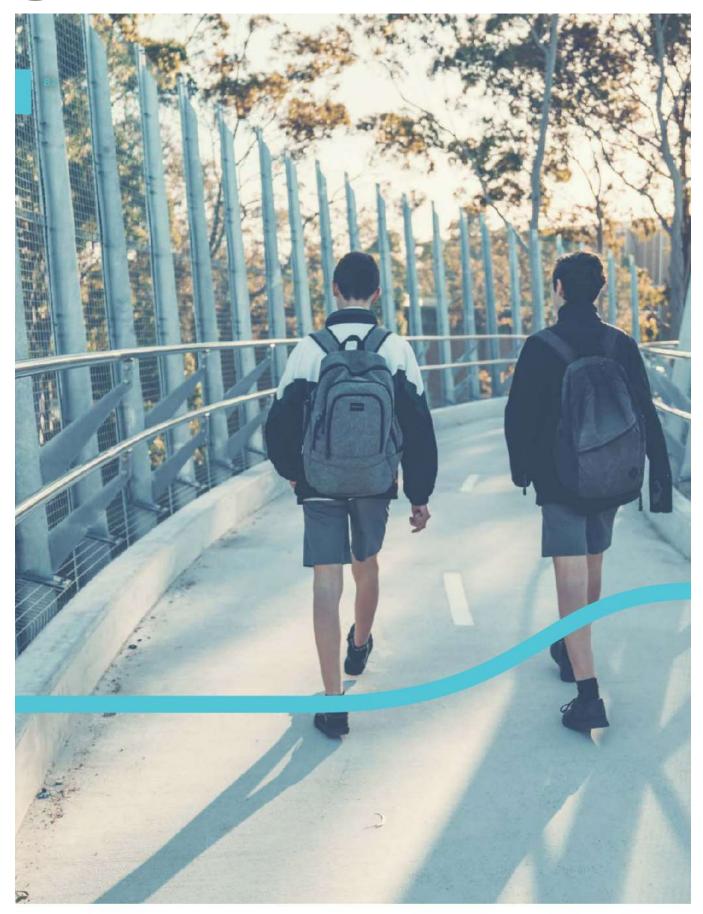


Principles

- Minimise risk to public health and safety from urban and natural hazards.
- Reduce risk to life and property.
- Support initiatives that respond to climate change.
- Avoid intensification of development and incompatible land uses in areas exposed to natural and urban hazards.
- Mitigate the UHI effect and extreme heat.
- Improve resilience to climate change in both natural and built assets.
- Balance urban tree canopy programs and bushland restoration with natural hazard risk.

No.	Action	Time	Partner
8.1	Identify high-risk bushfire prone precincts in response to the National Fire Danger Rating System	S	
8.2	Identify where to limit the intensification of development in areas exposed to hazards in the environment study and local housing strategy	I	
8.3	Develop LEP and DCP controls to implement these studies, including constraints mapping, coastal hazards, and measures to restrict development in high-risk hazard areas	I	
8.4	Investigate a natural hazards and resilience framework to clarify Council's policy on sea-level rise and address long-term natural hazard and climate-related risk across the Northern Beaches	S	
8.5	Develop Protect, Create, Live and associated action plans for adaptation and resilience	SML	
8.6	Prepare a climate action plan for the LGA and a climate adaptation plan for Frenchs Forest Planned Precinct	I	
8.7	Resolve the future of Ingleside so that any development is sustainable and resilient to natural hazards	I	DPIE







ATTACHMENT 1 Draft Northern Beaches Local Strategic Planning Statement - Towards 2040 ITEM NO. 12.1 - 24 SEPTEMBER 2019



Infrastructure and collaboration



Infrastructure and collaboration

Providing new and upgraded infrastructure such as public transport, schools and open space is essential to a more liveable, sustainable and productive Northern Beaches.

We will partner with State agencies, councils, the community and other stakeholders to optimise existing infrastructure, deliver new and upgraded infrastructure and align growth with infrastructure planning.

Planning priority

 Priority 9
 Infrastructure delivered with employment and housing growth







Priority 9

Infrastructure delivered with employment and housing growth

A '30-minute city' is a planning concept that supports planning for a city in which people can easily access the places they need to visit each day within 30 minutes by public transport, walking or cycling from where they live. It means people spend less time commuting and more time with friends, family, undertaking education, leisure or exercise. This can be a challenge in the Northern Beaches due to the distance between centres and limited public transport.

Analysing the time it takes to travel from one area to another, where people live, and where jobs and main services are located sets the context for how the Northern Beaches functions and informs decisions about:

- the effectiveness of public transport
- better access to services and facilities
- where new development is needed or should be located.

With this understanding, we can sequence development, be selective about where and when it occurs so that new infrastructure is provided in the right place at the right time. For example, Brookvale and Dee Why are the LGA's most accessible centres but the constrained road network must be addressed in conjunction with growth to realise the centre's potential. Precinct-level planning will mean new housing and jobs are planned alongside infrastructure for the whole precinct. 85

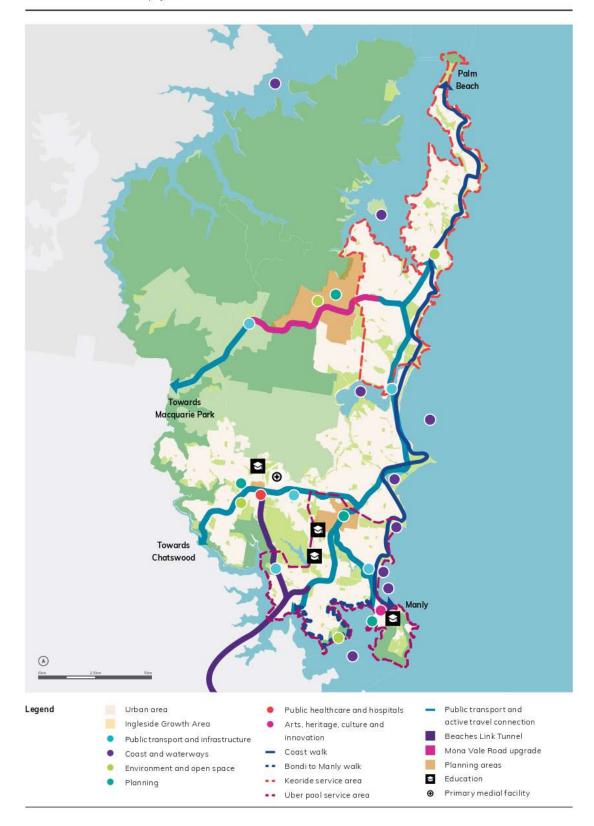
We will work with State agencies to develop and align planning for infrastructure and growth, from investment and integrated strategies where alignment across agencies is critical, such as the Beaches Link Tunnel, to smaller projects such as shared use of school sports fields.

Other opportunities for collaborative approaches to land use and infrastructure planning will become apparent as we complete LEP studies, starting with an LGA-wide land use and infrastructure implementation plan that will explore growth infrastructure compacts in urban renewal areas and inform reviews of the contribution plans.





Map 9 Northern Beaches collaboration projects





- Public transport and infrastructure
- B-Line bus service and commuter carparks
- Dee Why Chatswood bus connection
- Mona Vale Macquarie Park bus connection
- Brookvale Manly bus connection
- Beaches Link Tunnel
- Mona Vale Road upgrade
- Regional cycle network
- On-demand transport trials
- Freight and mass transit investigations
- Wharf and ferry service improvements
- Electric vehicles

Partners: DPIE; TfNSW; RMS; Ku-ring-gai, Ryde, Willoughby, Mosman and North Sydney Councils

Arts, heritage, culture and innovation

 Public-private partnerships, for example, Manly community service hub

Partners: Community service providers

Planning

- Frenchs Forest Planned Precinct
- Ingleside Growth Area
- Brookvale strategic centre (precinct-level planning)
- State Environmental Planning Policies that override local controls, for example, seniors housing, affordable housing, contribution planning and the Medium Density Housing Code
- Former Manly Hospital site

Partners: DPIE; GSC; GBCA; NSWH; DOE; TfNSW; RMS

Schools and education

- Establish a university
- School capacity planning
- Shared and joint use of government-owned property, including schools and sport fields

Partners: DOE; NSWH; independent schools

- Public healthcare and hospitals
- Northern Beaches Hospital
- Frenchs Forest health and education precinct

Partners: DPIE; NSWH

- Coast and waterways
- Manly and Shelly Beach Smart Beaches project
- Coastal management programs for open coast, Hawkesbury and Sydney Harbour
- Monitoring and evaluation reporting at four lagoons and Pittwater
- Scotland Island water and wastewater feasibility study

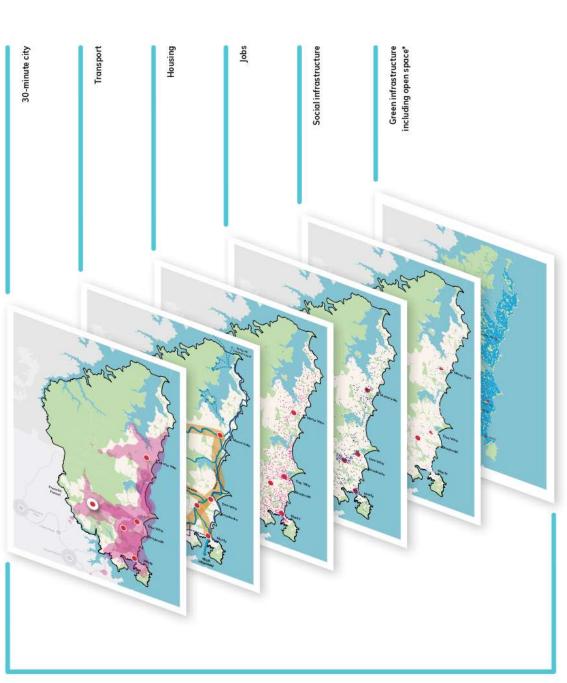
Partners: Sydney Coastal Councils; Lake Macquarie Council; University of Technology

- Environment and open space
- Coast walks connecting Palm Beach to Bondi
- Greater Sydney Green Grid
- Waterway health risk-based framework
- Urban heat strategy
- Green Star Community at Frenchs Forest
- Get Ready Northern Beaches project
- Sustainability Advantage program
 bronze status
- Cities Power Partnership
- Ingleside Chase Reserve
 biobanking agreement

Partners: DPIE; GA; City of Sydney; Mosman, North Sydney, Waverley and Woollahra Councils; Property NSW; Sydney Harbour Federation Trust; NSROC; GBCA; Office of Emergency Management



Figure 39 Coordinated land use and infrastructure planning



Elements of coordinated land use planning

*also includes bushland, urban tree canopy cover, and natural and man-made waterways (see P1 and P5).



Principles

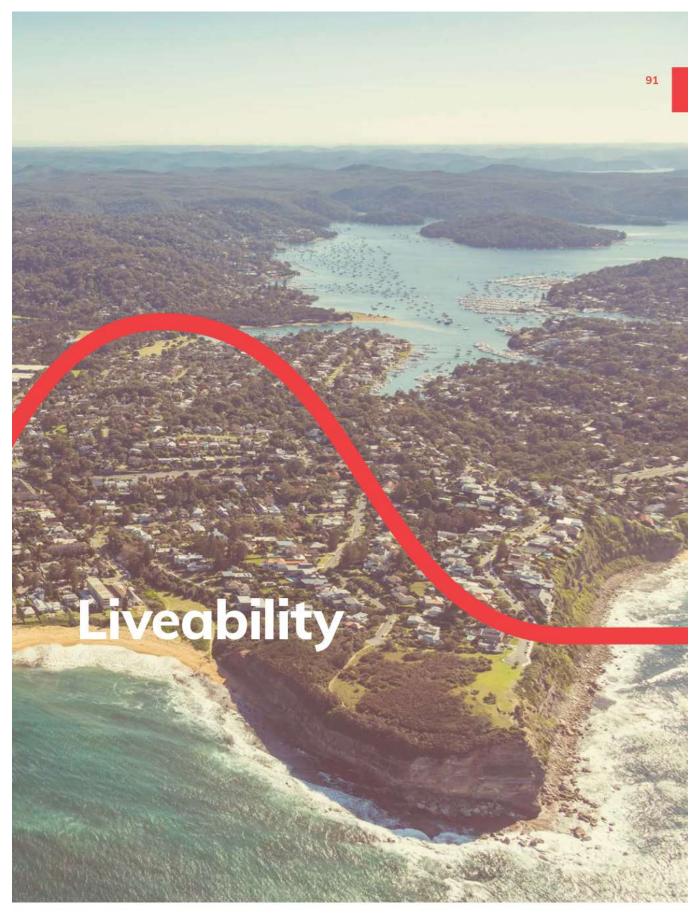
- Collaborate across all levels of government to integrate land use and infrastructure.
- Use precinct planning to sequence and fund growth and infrastructure in strategic centres.
- Foster public-private partnerships.
- Facilitate transparent collaboration processes and involve stakeholders and the community early.
- Ensure new and upgraded infrastructure is efficient and flexible to adapt to long-term needs.
- Ensure new development is supported by an infrastructure assessment and demonstrate that demand for the infrastructure it generates can be satisfied.

No.	Action	Time	Partner
9.1	Develop an LGA-wide land use infrastructure implementation plan informed by LEP studies to align planning and funding for housing, employment, social infrastructure, green infrastructure and transport	I	DPIE
9.2	Develop LEP and DCP controls that safeguard transport and infrastructure needs, including a review of the SP2 infrastructure zone	S	
9.3	Deliver Stage One of the Frenchs Forest Hospital Structure Plan and unlock future stages	SM	DPIE DOE NSWH
9.4	Facilitate a whole-of-government precinct-level approach to planning for growth and infrastructure in urban renewal areas such as Brookvale strategic centre		GSC DPIE TfNSW DOE NSWH
9.5	Prepare and implement a community participation plan	S	DPIE
9.6	Advocate to increase the range of essential infrastructure applicable under Section 7.11 of the Environmental Planning and Assessment Act 1979 (EP&A Act)	SM	DPIE
9.7	obby the NSW Government to permit increased developer contributions S nder Section 7.12 of the EP&A Act where required		DPIE
9.8	Investigate new funding mechanisms such as value capture	SM	DPIE
9.9	Fund infrastructure improvements through Council's delivery program and contribution plans	SML	











222



People

Everyone in the Northern Beaches community should be able to engage in activities where they interact with others, improve their health and wellbeing or get involved in education.

Our planning must respond to the community's existing needs while being mindful of projected demographic changes.

Planning priorities

 Priority 10
 World-class education facilities, including a university

• Priority 11

Community facilities and services that meet the changing community needs

- Priority 12
 An inclusive, healthy, safe and
 socially connected community
- Priority 13 Strong engagement and cooperation with Aboriginal communities
- Priority 14
 An artistic, creative and
 innovative culture









Priority 10

World-class education facilities, including a university

Tertiary education and training facilities on the Northern Beaches include TAFE NSW, Northern Beaches at Brookvale, International College of Management Sydney at Manly and the University of New South Wales (UNSW) Water Research Laboratory at Manly Vale, Australia's largest and most comprehensive hydraulics laboratory.

By 2036, many young people will transition from high school to tertiary education, adding to the existing 12,500 university students on the Northern Beaches. **If they can continue to study locally, we can retain more younger people on the Northern Beaches.**

> The LGA has a lower than average participation in tertiary education, at only 6.7% of the 15 to 64 year old age group compared with 9% for Greater Sydney¹⁵. University students on the Northern Beaches mostly live around Dee Why, Balgowlah and Beacon Hill. They travel between one hour to two hours and 40 minutes (by bus) to access university. Without a university campus on the Northern Beaches, and with poor public transport and indirect routes to other campuses, students have few options.

The LGA has a great opportunity: the potential of the Frenchs Forest health and education precinct, which contains the Northern Beaches Hospital. The North District Plan identifies Frenchs Forest as a health and education cluster model that includes university collaboration or a campus. 93

There are opportunities for research in health and related fields at Frenchs Forest in partnership with industry in allied health, aged care, sport and exercise science. Co-location of a new university with Northern Beaches Hospital would create a world-class health and education precinct with potential for secondary benefits of business growth in the new town centre and adjoining business park.

The Northern Beaches has a larger population of people aged between five and 20 years compared to the North District and Greater Sydney. An extra 3,454 school students will need to be accommodated in schools in the Northern Beaches by 2036. We will work with the Department of Education and independent providers to address the expected increase in school students.

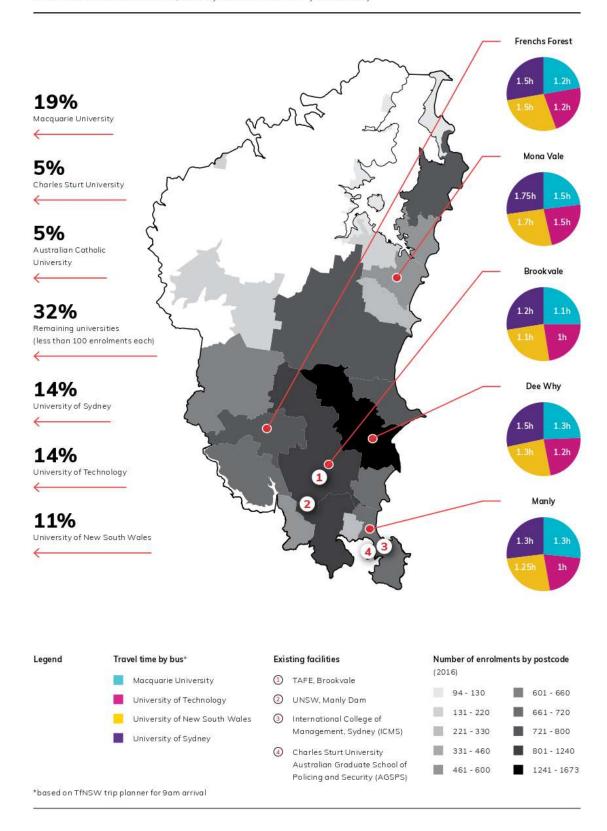
Figure 40

Other industry specialisation opportunities for higher education on the Northern Beaches¹⁵





Figure 41 Northern Beaches education facilities, university students and where they travel to study¹⁵





Principles

- Increase the availability of local education opportunities.
- Establish a university in a strategic centre close to high-frequency public transport, and student housing or affordable housing.
- Ensure new educational buildings, or additions to existing buildings, exhibit design excellence and integrate into surrounding areas.
- Help schools to provide the education services required as the number of students increases.

No.	Action	Time	Partner
10.1	Investigate opportunities for a university in a strategic centre	SM	DPIE DPE NSWH
10.2	Respond to expected increase in school students in collaboration with providers and increase shared and joint use projects	S	DOE and independent schools
10.3	Develop LEP and DCP controls that facilitate opportunities for training and education within facilities and new models for communal learning spaces; review appropriate zoning for education facilities; and align with the State Environmental Planning Policy (Educational Establishments and Child Care Facilities) 2017	S	





Priority 11

Community facilities and services that meet changing community needs

Community facilities and services provide spaces for people to connect, create and learn. They include community centres, schools, childcare centres, libraries, health services, entertainment and leisure facilities (these are also known as social infrastructure). As the population grows, we need to make better use of the LGA's open spaces, beaches, national parks, waterways, dams and walkways and improve access to and planning for upgraded or new facilities (see P6).

Multi-use facilities like Avalon Recreation Centre, Tramshed Arts and Community Centre and Dee Why PCYC are community focal points, while smaller facilities like community halls provide for single or specialised uses, with limited space for casual social interaction. Surf life saving clubs also provide an essential role, with renewal projects underway for Mona Vale, Long Reef and Manly Surf Lifesaving Clubs. With limited social infrastructure in Frenchs Forest, the planned precinct process includes provision of a library, community centre, childcare centre, sporting fields, multi-use outdoor courts, indoor courts, shared use opportunities and expanded aquatic facilities and programs at Warringah Aquatic Centre.

Most of the Council-owned or managed social infrastructure facilities in the LGA are along the coast around centres. Social infrastructure is more dispersed in inland areas. For example, isolated areas like Terrey Hills have limited access to facilities whereas Warriewood-Narrabeen accommodate a range of facilities. There are clusters of facilities in higher-density areas such as Dee Why, while other high density areas such as Collaroy have comparatively fewer facilities. The mix of facilities and how they meet community needs also varies. For example, while Manly has a higher concentration of facilities that matches its higher density, facilities are generally smaller, localised facilities; there is no larger multipurpose facility.





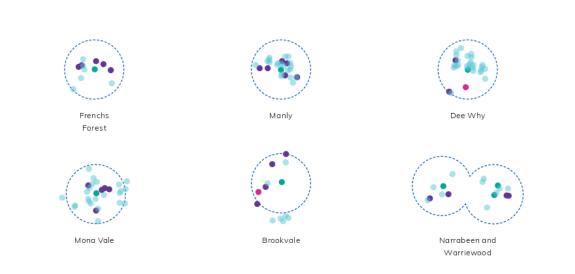
Utilisation also varies – some facilities, such as Dee Why PCYC, are so popular that capacity has been reached. Most facilities are ageing, need maintenance, or are dated and do not meet the needs of the community. Opportunities include:

- existing infrastructure: reinvigorating existing facilities by adapting to universal design, installing digital technology or activating for day and evening use
- flexible, adaptable, accessible, multiuse spaces: increasing multi-use facilities or upgrading single-use facilities to cater for a broader range of users
- innovative models and partnerships: investigating co-working hubs, start-ups or creative uses; integration of indoor and outdoor spaces; transitional and pop-up uses; partnerships with providers and agencies; community learning spaces such as vertical campuses and community lounges; and shared use of school sports fields for community uses
- community hubs in strategic centres: clustering community facilities and services such as social services, community centres or libraries

- re-imagining other infrastructure: exploring how infrastructure such as surf life saving clubs and RSL clubs can be used for the broader community
- distribution, type and need: aligning distribution and type of facilities with population density and community needs, for example, the large proportion of family households with children and ageing population.

Our social infrastructure study will examine the adequacy of existing social infrastructure to support the existing and forecast population. Location specific opportunities for investigation include:

- Brookvale: a multi-use community facility incoporating co-working or economic development spaces.
- Dee Why: enhanced connection between existing facilities to deliver an integrated multi-use community facility cluster.
- Manly: a networked approach to activate existing community facilities as a multi-use community facility hub. Opportunities may also include tailoring facilities to also support visitors and night-time activity.
- Mona Vale: a multi-use community facility and activation of the existing cluster of community facilities, together with the new arts centre, to enhance vibrancy of the centre.



Draft Local Strategic Planning Statement 2019

Figure 43

Concentration of social infrastructure near strategic and local centres - Northern Beaches 2019¹²

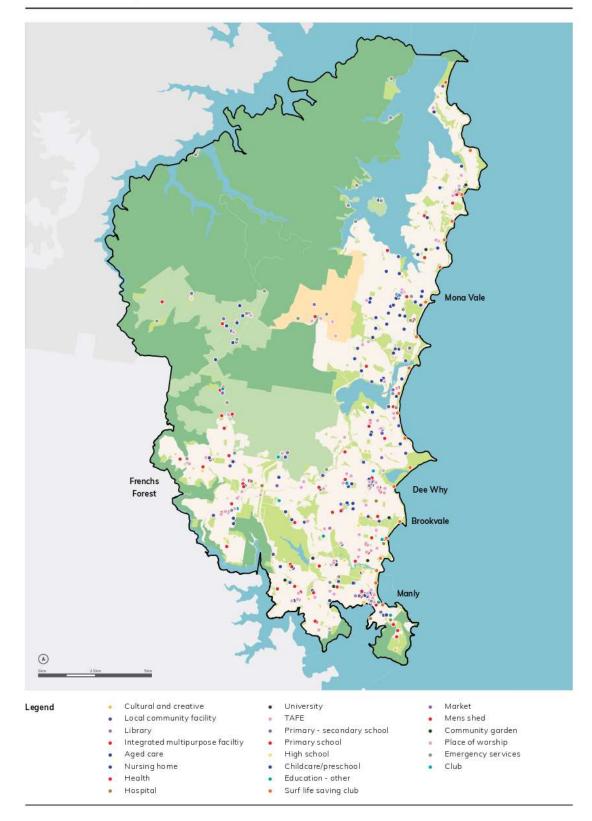
97





Map 10

Northern Beaches community services and facilities¹²

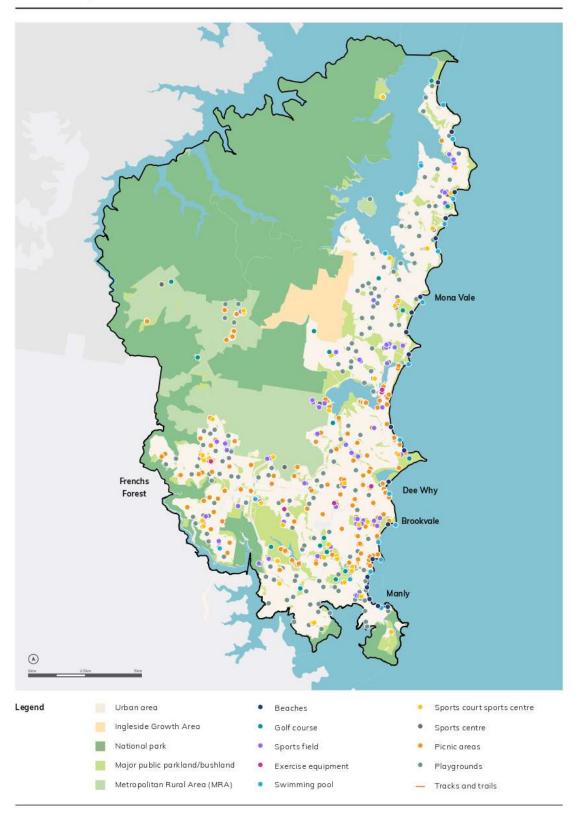




Map 11

Northern Beaches sport and recreation facilities¹²







	Principles				
	 Plan effectively for an accessible and integrated network of places and spaces that support community wellbeing and innovation. 	•	,	community in the planning of high-quality, innovative g places and spaces. partnerships for shared and government and privately ities for community uses. ocation of community services and community hubs in strategic centres.	
	 Ensure new development is supported by appropriate social infrastructure. 	•	joint use of governmen		
	 Support integration of co-working spaces as part of future upgrades or provision of new social infrastructure. 	•	Enable co-location of c		
	 Enhance the effectiveness of existing facilities. Provide flexible, diverse and multi-use places and spaces close to public transport and strategic and local centres. 				
No.	Action			Time	Partner
11.1	Complete a social infrastructure study, open space and recreation childrens services strategy, community centres strategy, social p plans for specific demographics (young people, older people, peo disability or people from a culturally or linguistically diverse back	olan ar ople w	nd specialised vith a	I	
11.2	Prepare and implement a property strategy to optimise Council- for long-term benefit, addressing findings of social infrastructure			S	
11.3	Incorporate the findings of these studies by planning for new and infrastructure or developing LEP and DCP controls that facilitate joint and shared use, universal design and multi-use facilities			S	
11.4	Prepare place plans that respond to the findings of these studies	5		0	
11.5	Explore opportunities for joint and shared use and public-private	e partr	nerships	SM	TfNSW DOE NSWH
11.6	Build community services and facilities at Frenchs Forest and We Aquatic Centre, including a library and community space	arring	ah	SM	DPIE DOE NSWH
11.7	Renew and implement a memorandum of understanding for joint use projects and establish tracking to monitor progress	t		SM	DOE
11.8	Investigate funding mechanisms for new social infrastructure, es through precinct-based urban renewal in strategic centres	specia	lly	S	DPIE
11.9	Finalise and implement the Arts and Creativity Strategy, Commu and Services Policy, Sportsground Strategy and Disability Action	-		SM	

Towards 2040

S

TfNSW

11.10 Prepare a public transport plan to improve access to community facilities



Lionel Watts Playing Fields, Davidson







Priority 12

An inclusive, healthy, safe and socially connected community

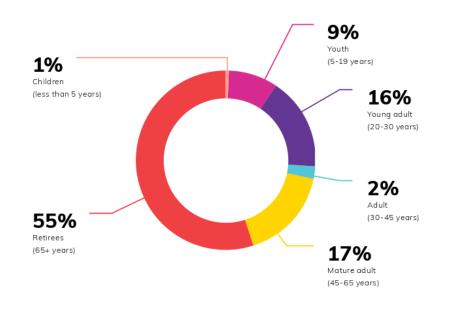
Globalisation, emerging technologies, social media, climate change and urbanisation have implications for how people live today. Mental health hospitalisations in the Northern Beaches are above NSW averages, more people live alone, and sedentary lifestyles have increased the risk of obesity and Type 2 diabetes.

Creating opportunities for people to participate in community activities, arts, recreation and cultural activities encourages social connection, trust, understanding and neighbourliness. For example, the ageing population presents an opportunity for places to be age-friendly to support older people's social and recreation needs and make it possible for people of all abilities to access places, buildings and transport. Creating multigenerational places will balance this work with the requirements of the LGA's young people.

About 9,280 people (3.7% of the population) in the Northern Beaches require assistance in a core activity. These people generally live in or near retirement communities and aged care facilities.

Figure 44

Population growth by age - Northern Beaches LGA (% growth 2021-36)





horthern beaches council



Educational and community facilities, social enterprises, community initiatives, clubs and sporting organisations help foster healthy, culturally rich and networked communities. Our plans to co-locate social infrastructure and services build on this idea.

We can plan for and design streets, places and neighbourhoods that include activity elements like walkable streets, bike paths, quality open spaces and recreation opportunities, combined with public transport access and a diversity of housing, employment, education and community facilities. While community wellbeing is typically considered to be intangible, wellbeing indicators or indices could help us to monitor how successfully we are planning for community wellbeing as we provide community facilities and services.



Principles

- Develop neighbourhoods that inspire social interaction and inclusion and support health and wellbeing.
- Prioritise community services and facilities in areas where there is evidence of greater needs.
- Locate seniors housing, social and affordable housing near centres and high-frequency public transport.
- Promote active travel and public transport to community facilities and services.
- Cater for social interaction, creative and cultural pursuits, and night-time activity in public places.
- Encourage fresh food production in urban areas, such as community gardens, private gardens, rooftop gardens and verge gardens.
- Provide accessible, welcoming and safe places for all ages, abilities and cultures.

No.	Action	Time	Partner
12.1	Engage early with State agencies in precinct and place plans to plan for healthy, safe and socially connected communities	SM	All
12.2	Deliver Frenchs Forest Planned Precinct that meets Green Star liveability criteria for healthy and active living, safety, walkability and access to fresh food; community development projects and programs; and celebrating culture, heritage and identity	SM	DPIE TfNSW DOE NSWH
12.3	Prepare and implement a community participation plan to ensure representation from diverse communities	S	DPIE
12.4	Prepare a social infrastructure study, open space and recreation strategy, social plan and specialised plans for specific demographics (young people, older people, people with a disability or people from a culturally or linguistically diverse background), community centre strategy	I	
12.5	Develop LEP and DCP controls that respond to these studies and address universal design requirements; communal spaces in residential flat buildings, including rooftops; fresh food production in urban areas; design criteria for the public domain, including making it easier to walk and cycle; temporary uses; night-time economy; arts and creative industries; and public art	S	
12.6	Finalise and implement the Arts and Creativity Strategy; Disability Action Plan 2017-2021 and Community Development and Services Policy	SM	
12.7	Develop wellbeing indicators to monitor community health and community facilities and services provision	SM	
12.8	Prepare a public transport plan that identifies and improves public transport service to concentrations of vulnerable population groups	S	TfNSW
12.9	Investigate mechanisms to address homelessness	S	DPIE



Cafés in Newport





Priority 13

Strong engagement and cooperation with Aboriginal communities

Before European settlement, Northern Sydney's Aboriginal clans lived along harbour foreshores, fishing and hunting in the waters and hinterlands and harvesting food from the surrounding bush¹⁷.

There are more than 440 identified Aboriginal heritage sites on the Northern Beaches – places and objects that Aboriginal people connect to physically and spiritually. This includes shell middens, rock paintings (such as stencil art protected in rock shelters), grinding grooves and water holes, ceremonial grounds, burials, rock engravings, scarred trees, stone and ochre quarries, fish traps, stone arrangements and seed grinding patches. These sites must be protected from development, vandalism and natural erosion.

The Aboriginal Heritage Office is a joint initiative by Lane Cove, North Sydney, Willoughby, Ku-ring-gai, Strathfield and Northern Beaches Councils to protect Aboriginal heritage in these areas.

Our Stories, Irrawong Reserve

Nearly 1,400 people (0.5% of the population) in the Northern Beaches **identify as Aboriginal and Torres Strait Islander.**

The Aboriginal worldview is based around a kinship with the natural environment¹⁷. The connection Aboriginal and Torres Strait Islander people have with their land and heritage can also influence the economic self-determination of Aboriginal communities, especially on MLALC-owned land (see P4). MLALC-owned land is set to increase through the Crown Lands Transfer Program, an independently facilitated process that streamlines Aboriginal land claims and provides certainty to all parties in terms of Crown land. Northern Beaches LGA is part of an initial phase of this project.

> Northern Beaches Council supports reconciliation between Aboriginal peoples and the councils of the North District.





Principles

- Promote, preserve and protect Aboriginal and Torres Strait Islander heritage and culture in partnership with local Aboriginal and Torres Strait Islander communities.
- Recognise, honour and protect Aboriginal arts, culture and heritage through the design of public spaces, public art, festivals and support for social and economic initiatives.
- Promote education, arts and cultural programs to foster the community appreciation and celebration of Aboriginal and Torres Strait Islander cultural heritage.
- Engage Aboriginal and Torres Strait Islander people in planning and decision-making.

No.	Acti	on	Time	Partner
13.1		elop LEP and DCP controls that protect Aboriginal heritage and areas of cultural ificance including the Government Architect NSW's Ochre Grid (once finalised)	S	AHO GA DPIE
13.2	Fina	lise the Crown Lands Transfer program	S	DPIE MLALC
13.3	inclu and	k with MLALC to implement initiatives in their community land and business plan Iding tourism strategies and aspirations for a cultural centre; homelessness strategies social housing schemes; and identification and protection of places with high cultural tage values	SM	MLALC NSWALC
13.4		pare and implement a community participation plan that incorporates Aboriginal esentation and collaboration with the local Aboriginal Heritage Office	S	AHO
13.5		stigate mechanisms to better connect with Aboriginal and Torres Strait Islander people living cultures, including:	SM	AHO MLALC Councils
	α.	engaging an Aboriginal Liaison Officer to direct how we consult with local Aboriginal and Torres Strait Islander people		
	b.	establishing either a local reconciliation action plan or treaty between Aboriginal and Torres Strait Islander people of the northern parts of Sydney and respective councils		
	C.	supporting a national treaty between Aboriginal and Torres Strait Islander people and all levels of government		



108 <u>20</u>0

Priority 14

An artistic, creative and innovative culture

The Northern Beaches has a growing arts and creativity community with around 8% of the workforce employed in cultural or creative occupations and many others participating as a hobby¹⁸. This includes activities across visual arts, literature, film, sculpture, new media, design, architecture, as well as festival and community events.

Recent council initiatives include developing a strategy for implementing the 36-kilometre Coast Walk featuring permanent, temporary and ephemeral interpretive public art. A Cultural Policy, Collections Management Policy, Public Art Policy, Arts and Creative Strategy and associated action plan. Mona Vale Arts Centre with a community gallery, teaching spaces and studios and Avalon Creative Studios with additional affordable artist studio spaces. markets like the Creative Made Markets; events such as Pittwater Artists Trail and Creative Creatures Film Festival; and live music venues.

The draft Arts and Creativity Strategy highlights the importance of arts and creativity for the community and our commitment to supporting arts, creative and cultural opportunities.

We can increase the supply of creative and cultural spaces by reviewing planning controls and processes to enable opportunities for shared use of existing government-owned places. The LGA's strategic centres offer opportunities to incorporate art in urban design and planning and by identifying spaces for creative pursuits and activations.

Create NSW indicates that **for culture to truly flourish it needs a home - places** where it can be created, shared and enjoyed (Cultural Infrastructure Plan 2025).

Arts, culture and creativity is facilitated through public cultural infrastructure to privately owned and operated businesses, including clusters of arts, creative and gallery spaces at Mona Vale, Manly, Avalon, Brookvale and Seaforth;

Figure 46

Northern Beaches programs and events

Programs and events with high participation rates include...



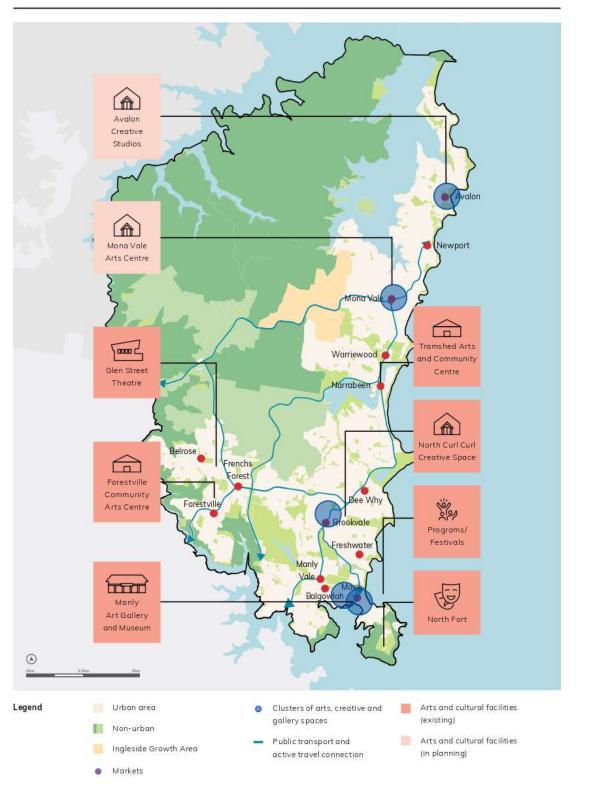
Manly Jazz Festival

118,000 people



Map 12

Northern Beaches creative and cultural facilities





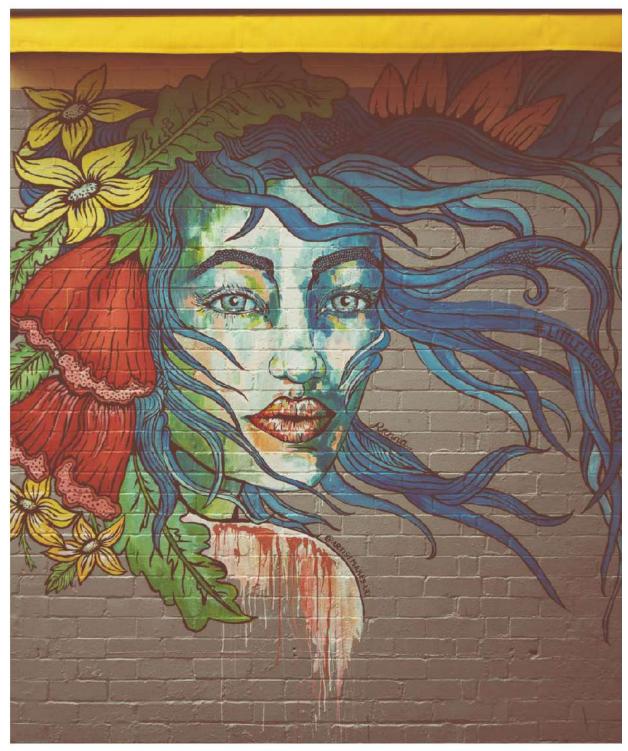
Principles

- Create a network of arts, cultural and creativity spaces that contribute to the community and economy.
- Enable arts and creative uses, including shared use of government-owned property for temporary uses such as art exhibitions, art productions, markets and events.
- Enhance and promote creative expression and public art participation, including during the evening.

No.	Action	Time	Partner
14.1	Finalise and implement the Arts and Creativity Strategy and action plan, Collection Management Policy and Public Art Policy	0	
14.2	Develop LEP and DCP controls that respond to social infrastructure and employment studies, the economic development plan and the Arts and Creative Strategy, including temporary use such as markets in community centres; and facilitate public art in public and private development and use of vacant tenancies for arts, cultural or creative industries	S	
14.3	Investigate opportunities for shared use of government-owned property such as schools, hospitals, libraries, galleries and theatres or community centres for creative uses and/or exhibition spaces	SM	NSWH DoE
14.4	Review barriers to enable the arts and creative initiatives, such as review of approval processes and planning pathways	S	
14.5	Deliver the coast walk and implement the Coast Walk Public Art Strategic Plan – including permanent public artworks, integrated design projects, heritage interpretation and artistic and cultural programs	0	
14.6	Deliver a new arts centre in Mona Vale	М	
14.7	Repurpose Avalon Golf Clubhouse for artist studios and workshops	S	
14.8	Investigate arts and creative opportunities in place plans	S	
14.9	Pursue opportunities to integrate public art outcomes into the new Frenchs Forest Town Centre	М	



Mural, Manly







Housing

Demand for housing is linked to population growth.

The population of the Northern Beaches is steadily growing. Much of the demand for new housing can be met by development in areas already zoned for growth such as Dee Why, Brookvale and Mona Vale, and by developing areas such as the Frenchs Forest Planned Precinct. We will still need to identify and plan for some growth in new areas over the medium to longer term to meet demand.

The demand for different forms of housing is also increasing, particularly medium density housing such as townhouses. With limited housing diversity, the Northern Beaches offers few affordable housing options and limited access to social housing. The Northern Beaches requires a mix of housing types in well-planned neighbourhoods that are close to jobs, public transport, and walking and cycling options.

Planning priorities

- Priority 15 Housing supply, choice and affordability in the right locations
- Priority 16 Access to quality social housing and affordable housing







Priority 15

Housing supply, choice and affordability in the right locations

In 2016 there were 101,468 dwellings in the Northern Beaches LGA. The North District Plan sets a target for an additional 3,400 dwellings in the Northern Beaches between 2016 and 2021. We are well on the way to achieving this target through developments in existing centres and in areas such as Warriewood Valley. We will develop a 6-10 year housing target and a 20-year target in our local housing strategy, scheduled to be released in the first half of 2020.

The projected population growth for the Northern Beaches is expected to generate demand for an additional 11,200 new dwellings. Meeting this demand equates to an average of 620 new dwellings per year. This is consistent with historic development trends.

There is capacity for around 6,400 new dwellings to be developed in areas already zoned for growth and 4,360 dwellings are planned in the Frenchs Forest Planned Precinct. Housing increases could also result from plans for the Ingleside Growth Area, the Brookvale Structure Plan Area and through implementation of the NSW Government's Medium Density Housing Code. The draft Land Use and Infrastructure Strategy for Ingleside proposed 3,400 low to medium density homes. However, a Bushfire Risk Assessment prepared in 2018 found new residents could be exposed to unacceptable bushfire risks. Future housing capacity at Ingleside is therefore being reviewed in collaboration with the NSW Government to determine overall dwelling capacity. 113

The draft Brookvale Structure Plan identifies the potential for an additional 670 dwellings. This plan will be revised once additional traffic and transport investigations are completed.

The NSW Government's Medium Density Housing Code will permit a variety of medium density development in the LGA as "complying" development on land that is not currently subject to these controls. The commencement of the Code has been deferred until 31 October 2019. Council has requested an extension to the deferral and is seeking to address the Code via our local housing strategy.

Housing types

- Nearly 40% of households are couples with children living mainly in detached dwellings. However, a third live in attached dwellings or apartments, a trend that is expected to increase.
- Most homes 56% are separate dwellings. Higher density dwellings (semi-detached 9% and apartments 34%) are concentrated around coastal locations like Manly and Dee Why. The rest of the LGA generally comprises lower density housing.

Coming and going

- People moving to the Northern Beaches from outside the LGA are mainly relatively local, from areas like Ku-ring-gai, North Sydney and Willoughby LGAs. They tend to be adults settling with families.
- People who leave the Northern Beaches head to more affordable areas that offer a similar lifestyle such as the Central Coast and Gold Coast; closer to the Sydney CBD; or nearby areas, such as Ku-ring-gai, Willoughby, Hornsby or Mosman LGAs.
 Older age groups tend to move to northern coastal locations, whereas young adults move closer to the Sydney CBD and family households move to nearby areas.



While most housing demand to 2036 can be met through existing housing capacity and developing the Frenchs Forest Planned Precinct, we must also consider:

- current low levels of social housing and affordable housing stock (see P16)
- limited public transport and existing road capacity issues
- current State housing policies including policies for seniors housing, boarding houses and proposed medium density housing controls
- the LGA's natural environment, character and amenity, which constrain development
- housing that caters for different demographic groups, especially older people and families.

There is capacity for new shop-top housing or medium density housing in mixed use areas around Brookvale, Dee Why, Mona Vale and Manly and some local centres. Our local housing strategy will consider how we can unlock land for new housing around strategic centres, as below:

- Frenchs Forest: This State-led Planned Precinct will accommodate around 4,360 new homes over the next 20 years, with Stage One comprising 2,000 dwellings and further stages subject to infrastructure, including a public transport link to Chatswood and Beaches Link Tunnel.
- Brookvale: While renewal opportunities will support Brookvale as a place for jobs, new housing will be provided subject to infrastructure such as B-Line improvements, public transport to Chatswood and an express bus to Manly.

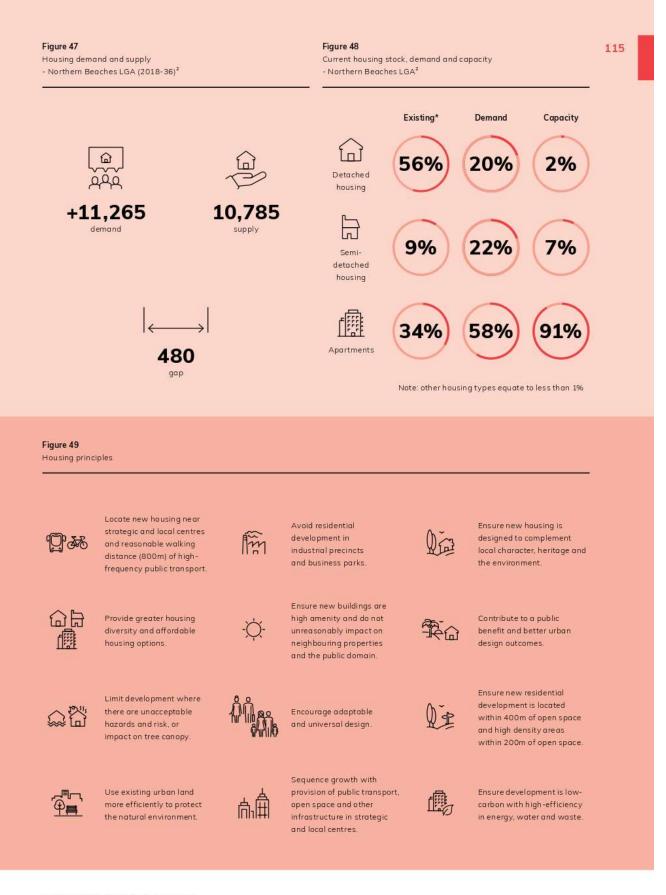
- Dee Why: New homes can be built under existing planning controls, with opportunities to diversify housing types around the centre.
- Mona Vale: Opportunities exist for new housing near the centre that complements the village character.
- Manly: Any new housing must balance requirements for short-term visitor accommodation with housing options for permanent residents within heritage constraints.

Existing residential areas will be investigated for increased housing diversity ('missing middle'), focusing on areas up to 1.5km from strategic and local centres with high-frequency public transport. Villages could accommodate housing that can be adapted for people to remain in their communities as their housing needs change.

Other investigations for new housing would need to consider constraints such as natural hazards and the high conservation value of the Metropolitan Rural Area that includes Oxford Falls Valley and Belrose North (see P4).

The new LEP and DCP will include controls to encourage high quality, well designed buildings, including medium density housing controls to create healthy, liveable neighbourhoods. Our local housing strategy will explore options for how we can address the housing needs of our community into the future.









Map 13 Northern Beaches existing housing density Map 14 Northern Beaches feasible housing capacity under current planning controls²

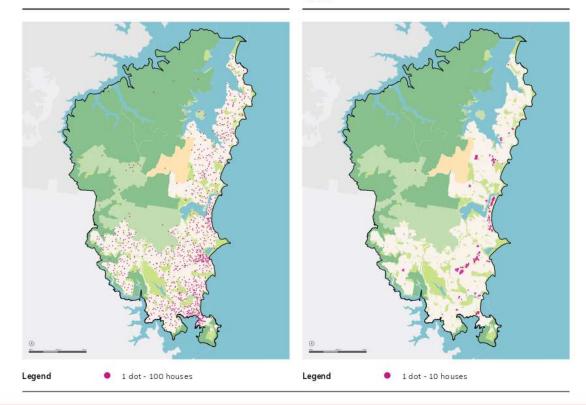
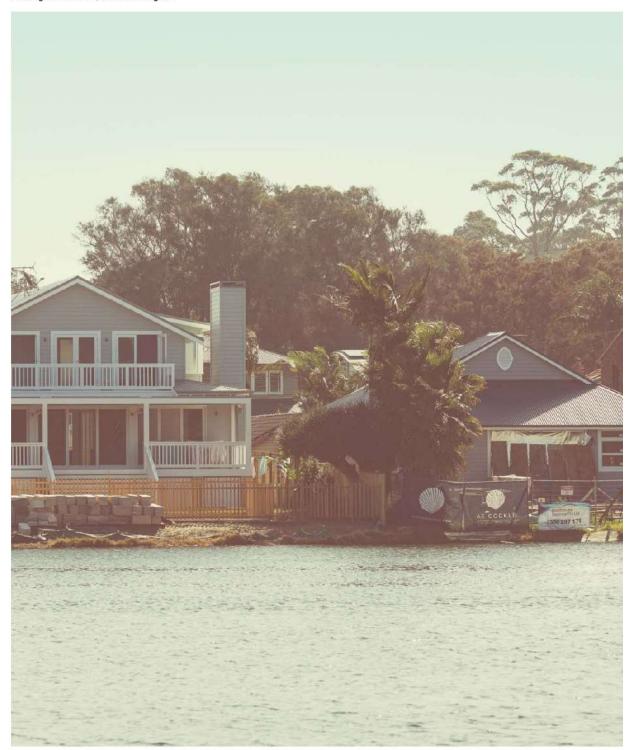


Figure 50 The missing middle² The missing middle Two houses ഫിഫ Single detached dwelling **Residential flat buildings** Dual occupancy ഫ L Residential flat buildings Side by side (attached) Side by side (detached) Multi-dwelling houses Medium-rise InIIn ΙпΙ Terrace houses Detached Manor homes



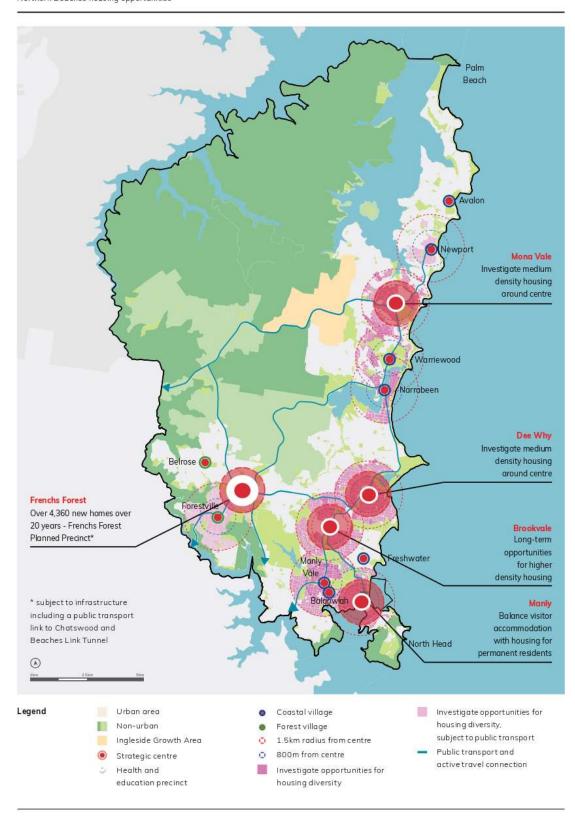
Housing Construction, Narrabeen Lagoon







Map 15 Northern Beaches housing opportunities²





No.	Action	Time	Partner
15.1	Prepare and implement a local housing strategy	I	DPIE
15.2	Develop LEP and DCP controls informed by the local housing strategy to ensure the supply and mix of housing responds to community needs, including apartment mix controls; low-rise medium density housing; adequate communal spaces in higher density development; requirements for adaptable housing and universal design; removal of floor space ratio (FSR) control for dwellings in Manly; and street activation in centres		DPIE
15.3	Seek exemption from State policies that override local housing provisions based on the delivery of housing that meets the demonstrated needs of the community through our local housing strategy, including:	I	DPIE
	a. seniors housing under State Environmental Planning Policy (Housing for Seniors or People with a Disability) 2004		
	 b. boarding houses under State Environmental Planning Policy (Affordable Rental Housing) 2009 		
	 medium density housing under State Environmental Planning Policy (Exempt and Complying Development Code) 2008 		
15.4	4 Investigate mechanisms for mixed use residential development in centres while also meeting requirements for minimum levels of retail and commercial floor space		
15.5	Establish place plans to respond to the local housing strategy and apply a whole- of-government approach to align growth and infrastructure in strategic centres		All
15.6	Clarify the future of Ingleside through a detailed bushfire evacuation study and community engagement		DPIE





Priority 16

Access to quality social housing and affordable housing

There is a limited supply of social housing and affordable rental housing on the Northern Beaches. The NSW Government provides around 1,200 social housing dwellings in the LGA, most of which are single-person households.

The supply of affordable rental housing, which is often provided by charities or a registered Community Housing Provider, is more difficult to monitor but is also limited. Rents across the LGA are rated as severely unaffordable to extremely unaffordable for a typical rental household.

The lack of affordable housing is pronounced for households on lower incomes, driving the demand for social housing and affordable rental housing.

From August 2019, Bridge Housing, in partnership with the Women's Housing Company, will manage some **1,200 social housing dwellings on the Northern Beaches** on behalf of the NSW Department of Communities and Justice. Housing affordability relates to the general affordability of both rental and purchase housing on the open market and is not limited to those on low to moderate incomes. A common benchmark of affordability is housing that does not absorb more than 30% of the gross income of very low, low or moderate income households.

Affordable rental housing is housing for households with very low, low or moderate incomes that are unable to access private market housing without financial stress. It is often provided by registered Community Housing Providers and involves a discount on market rentals.

Social housing or public housing is housing directly provided by the NSW Government to financially and socially disadvantaged people through the NSW Department of Communities and Justice.

Studies have identified an unmet demand of around 8,100 social housing and affordable rental housing dwellings in the LGA (excluding households already residing in social housing). Current wait times for social housing sit at five to 10 years, or more than 10 years for four-bedroom properties. Management responsibilities for these dwellings have recently been transferred from the NSW Government to Community Housing Providers.

Figure 51 Demand for social and affordable housing²

now



Unmet demand for around 8,100 social and affordable housing dwellings

2036



Projected demand for an additional 2,000 social and affordable housing dwellings by 2036

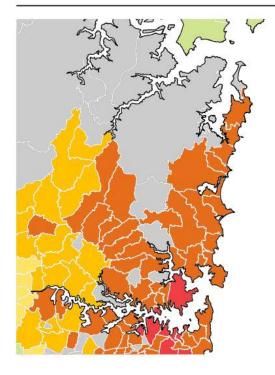
Demand for social and affordable housing **is projected to increase by around 2,000 dwellings by 2036**, to a total demand of around 12,000 dwellings.



ATTACHMENT 1 Draft Northern Beaches Local Strategic Planning Statement - Towards 2040 ITEM NO. 12.1 - 24 SEPTEMBER 2019

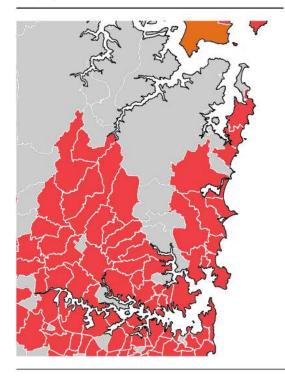
Map 16

Rental affordability index for a household income of \$100,000 per annum²

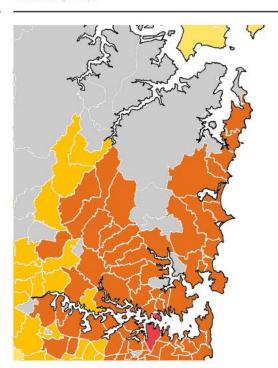


Map 18

Rental affordability index for a one bedroom for single pensioner²



Map 17 Rental affordability index for two bedroom for minimum wage couple² 121

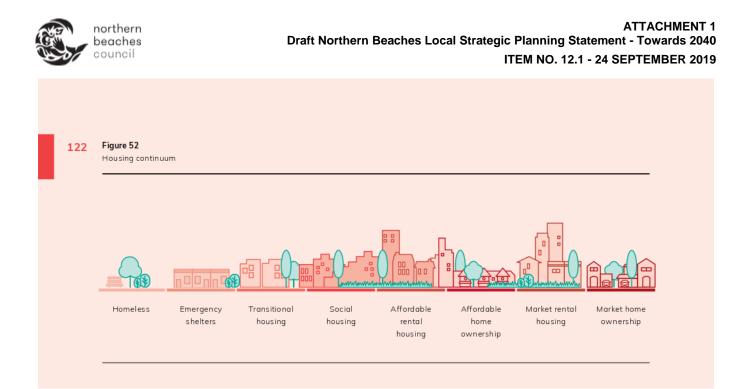


Legend Rental Affordability Index

Very affordable - 200 or above
 Affordable - 150 to 20 0
 Acceptable - 120 to 150
 Moderately unaffordable - 10 0 to 120
 Unaffordable - 80 to 100
 Severly unaffordable - 50 to 80
 Extremely unaffordable - 50 or less
 Data not available

The Rental Affordability Index (RAI) is the price index for housing rental markets. It represents rental affordability relative to household incomes.

Households paying 30% of income on rent have an RAI score of 100, indicating these housholds are at the critical theshold level for housing stress



Providing more diverse and affordable rental and social housing options will help families and key workers, such as police and health care workers, stay in the area. It will mean people of all incomes and backgrounds can participate in the community. Any new social housing and affordable rental housing must be well designed and located.

The Northern Beaches Affordable Housing Policy commits to a 10% affordable rental housing target for all planning proposals, urban renewal or greenfield development, with higher rates where financially feasible. We will implement this policy in the Frenchs Forest Planned Precinct, Ingleside Growth Area and other urban renewal areas.

Northern Beaches LGA is included in State Environmental Planning Policy No. 70 Affordable Housing. This allows us to require affordable rental housing in new developments in areas that are subject to 'upzoning' – that is, where new planning rules permit higher density development, subject to NSW Government approval. We have set affordable rental housing targets of 15% in Frenchs Forest town centre and 10% for the remaining rezoned area in Frenchs Forest Precinct; about 400 to 600 new dwellings. This is insufficient to meet current unmet demand or future demand for affordable housing. The challenge is to address this unmet demand in the context of relatively low increases in overall housing demand. Put simply, significant additional housing supply is not needed to address projected population growth, but is needed to address affordability issues and to provide a greater choice of housing options to a changing and ageing community.



Principles

- Build more high-quality and diverse social • Seek a minimum 10% affordable rental housing housing and affordable rental housing in areas close to services and facilities and with renewal or greenfield development, with access to high-frequency public transport. higher rates where financially feasible. • Protect and retain existing affordable
- rental housing.
- for all planning proposals for upzoning, urban
- Ensure the available supply of affordable rental housing is shared equitably among vulnerable residents.

No.	Act	ion	Time	Partner
16.1		ease the supply of affordable rental housing through the local housing tegy and LEP and DCP controls	0	DPIE CHP
16.2	Implement the affordable housing policy and action plan, including:		SM	DPIE
	a.	updating the voluntary planning agreement policy		
	b.	prioritising allocation of Council-managed affordable rental housing to key workers, people with a disability, long-term local residents, and people with a social or economic association to the Northern Beaches		
	C.	investigating the feasibility of providing affordable rental housing on Council-owned land prior to planning for development, redevelopment, lease or sale of that land		
16.3		elop an affordable housing contributions scheme for Frenchs Forest nned Precinct	S	DPIE
16.4	Investigate opportunities for joint projects with local Community Housing Providers and State S M CH agencies to deliver social housing and affordable rental housing on the Northern Beaches		СНР	
16.5	Sta	by the NSW Government to amend State policies that override local provisions, such as te Environmental Planning Policy (Affordable Rental Housing) 2009 to ensure social and rdable housing is well designed and located through appropriate local planning controls	S	DPIE
16.6		ablish a memorandum of understanding with the NSW Government to improve social sing provision in the LGA	L	



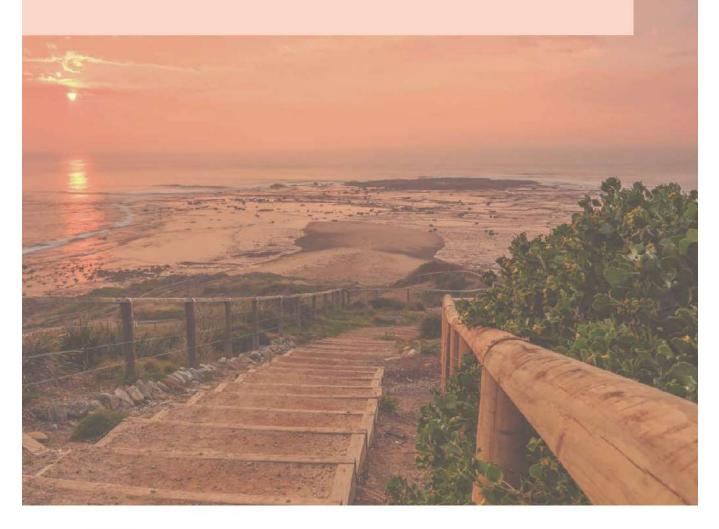
Great places

The Northern Beaches is a great place to live – we want to retain this by celebrating its special local characteristics and qualities.

Any new development must enhance local character – this requires planning for safe, inclusive, walkable, mixed-use areas with great design and connections to natural environment areas and an area's heritage. Places will be planned to foster interaction and healthy lifestyles, creativity, enterprise and innovation.

Planning priorities

- Priority 17
 Centres and neighbourhoods designed to reflect local character and lifestyle
- Priority 18
 Protected, conserved and
 celebrated heritage







Priority 17

Centres and neighbourhoods designed to reflect local character and lifestyle

The Northern Beaches offers a broad collection of places, each with their own diverse and special character. The LGA's five strategic centres, nine local centres and the neighbourhoods that surround them all differ, supporting a mix of higher-density living to low-scale environmentally sensitive residential areas, each within an extraordinary natural environment. Places of regional importance in the LGA include the beaches, Narrabeen Lagoon and Pittwater. the LGA's places will change over time, including characteristics to be retained or enhanced. Some places will change in character over time, for example where we have identified opportunities for growth, but place-making will remain central to the creation of great new places in these circumstances. 125

We will elevate the community's role in informing decisions to plan, create and renew muchloved places. This place-based, design-led approach will build on the valued characteristics of existing neighbourhoods and places.

distinct. Character will underpin planning for how of

A place's character is what makes a neighbourhood

'Great places and cities don't happen by chance: they are designed, and continue to be designed as we manage the transformation of our cities' - Better Placed, Government Architect NSW

Figure 53

Local character wheel and examples of local initiatives¹⁹

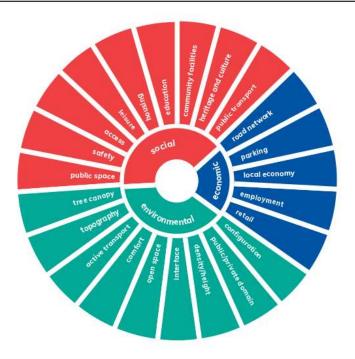






Figure 53

Local character wheel and examples of local initiatives¹⁹





Place plans



Public domain improvements



Community hubs and arts and cultural facilities



Tree canopy and streetscape programs



Public art programs







Partnerships with businesses



Place planning is a multidisciplinary approach to the planning and management of public spaces centred on the community's connection to place. We will apply place planning in strategic and local centres, starting with Avalon. Reviews of local character planning controls will consider special area controls, local character statements, additional controls for development in character areas, and assessment of desired future character areas. This may trigger local variations or, in exceptional circumstances, local exclusions from State-wide policies.

Priorities P23-27 include precinct-specific principles for Frenchs Forest, Brookvale, Dee Why, Manly and Mona Vale and should be considered in conjunction with the following principles.

Principles

- Renew great places through innovative design while respecting and enhancing local character.
- Enhance the visual and environmental amenity of buildings and places in centres.
- Enhance local identity through placebased planning and design.
- Activate public spaces and walking, cycling and public transport opportunities.
- Enable appropriate outdoor dining, night-time activity, events and temporary and interim uses.

No.	Action	Time	Partner
17.1	Prepare LEP local character study, local housing strategy, scenic and cultural landscapes study, and public domain guidelines; develop LEP and DCP controls that respond to these studies; implement design excellence provisions; improve design criteria for the public domain; and incorporate local character statements for key areas	IS	
17.2	Implement place planning, starting with Avalon, Manly and Mona Vale, that applies a place-based approach to planning for local character and responds to the findings of the LEP studies; and develop a rolling program of place plans for areas undergoing change	SM	
17.3	Prepare and implement activation plans to establish partnerships with businesses and the community, starting with Seaforth, Newport and Forestville	0	Local businesses
17.4	Establish a design excellence review panel	S	





Priority 18

Protected, conserved and celebrated heritage

Much of the LGA's tangible European heritage reflects the area's development from isolated settlements north of Sydney Harbour and along the eastern seaboard in the early 19th century.

- Local heritage: 572 items, 22 conservation areas and 29 archaeological sites
- State heritage: 15 items
- Middle harbour heritage items: 10 items (local and State items).
- Proposed State heritage listing: Dee Why Civic Precinct

We are currently undertaking a thematic history project that will collect information on the historical development of the area and common heritage themes. It will identify what makes places unique and provide a base for future heritage management decisions as they relate to 20th century architecture, moveable heritage, intangible heritage, Aboriginal heritage, natural heritage and items of social/community significance. While heritage items in the former Pittwater LGA were reviewed and updated in 2015, a list of late nominations needs to be assessed. Previous heritage reviews for the former Warringah and Manly LGAs were either limited in scope or not adopted and a study of modern architecture is required across the LGA.

As a result, we need to identify and list buildings and areas with potential heritage significance in the LGA. This includes items that represent multiple properties, such as whole streets in Manly, that may be better listed as groups or conservation areas, ensuring significant properties are individually listed. This process could also consider known and assessed heritage items and heritage conservation areas, and correct legal descriptions, mapping and other identified errors on listed items.

No.	Action	Time	Partners
18.1	Prepare and implement the heritage strategy; modern architecture study; thematic history project; heritage conservation areas review; harbour and ocean pools study; moveable heritage policy; and local heritage assistance grants program	SM	Heritage DPC AHO GA DPIE
18.2	Develop LEP and DCP controls that support adaptive reuse of heritage items; retain heritage items; and require sympathetic development near heritage items and conservation areas	S	
18.3	Educate the community and connect to the NSW Government's Heritage Near Me program	S	Heritage DPC AHO GA DPIE
18.4	Investigate how we can improve heritage through a heritage advisory service, significant tree register and memorials and monuments register; conservation management plans for Council-owned heritage items; securing grants to upgrade Council-owned heritage items; and a heritage award program.	SM	



Figure 54

Heritage principles

129



Encourage adaptive reuse of heritage items.



Encourage and promote public awareness, appreciation and knowledge of heritage conservation.



Facilitate best-practice approaches to heritage and celebrate the LGA's history and identity.

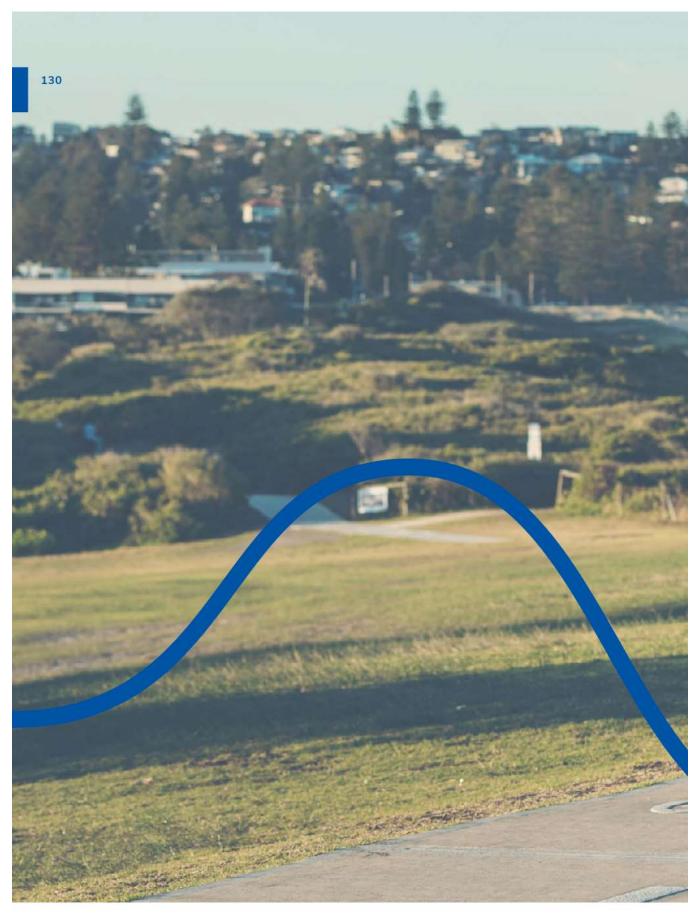


Identify, conserve and enhance local and state heritage.

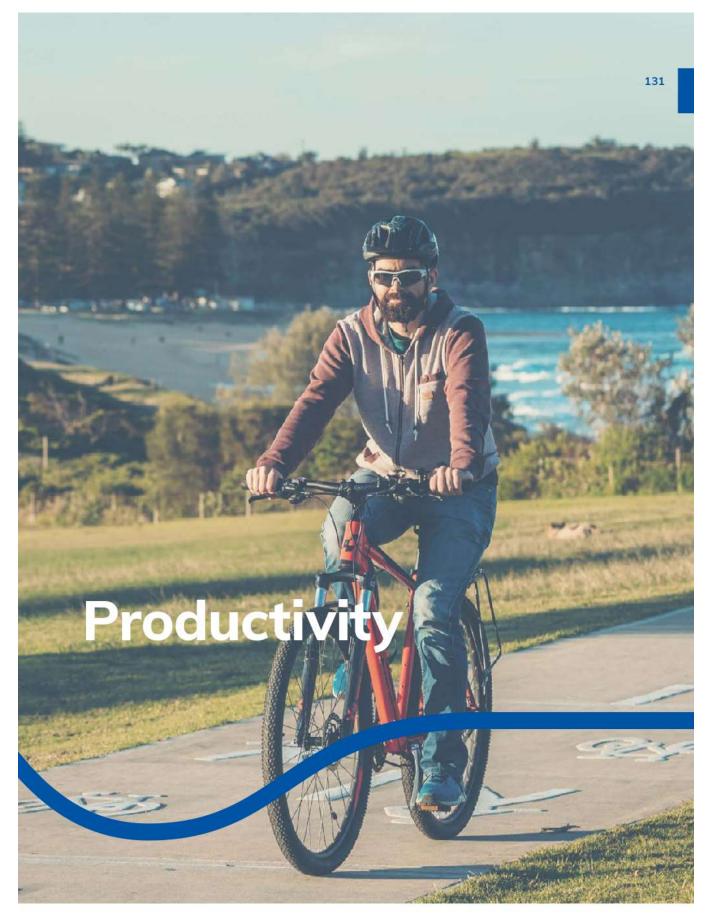


Ensure new development responds appropriately to heritage items, conservation areas and values, significance, views, context and character.











(D)



The coordination of land use with transport is essential. With better walking, cycling and public transport options, more people will more easily connect to and from their homes, workplaces, schools, communities, villages, town centres and beaches.

Connectivity

We will continue working with the NSW Government to deliver an integrated transport and land use planning approach in the Northern Beaches so that residents have the option to live without a car.

Planning priorities

- Priority 19 . Frequent and efficient regional public transport connections
- Priority 20 Sustainable local transport networks
- Priority 21 Road space and facilities to match changing community needs









Priority 19

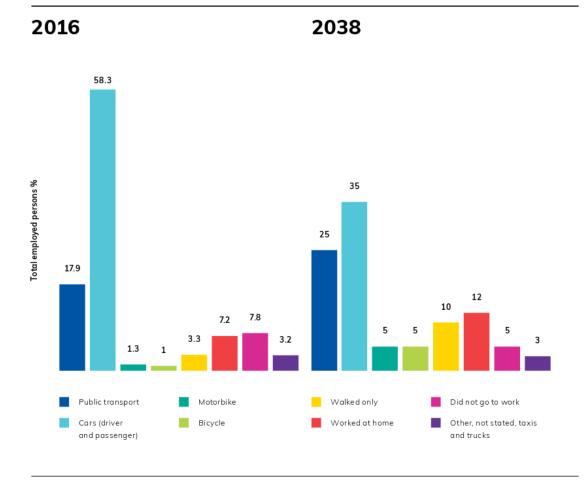
Frequent and efficient regional public transport connections

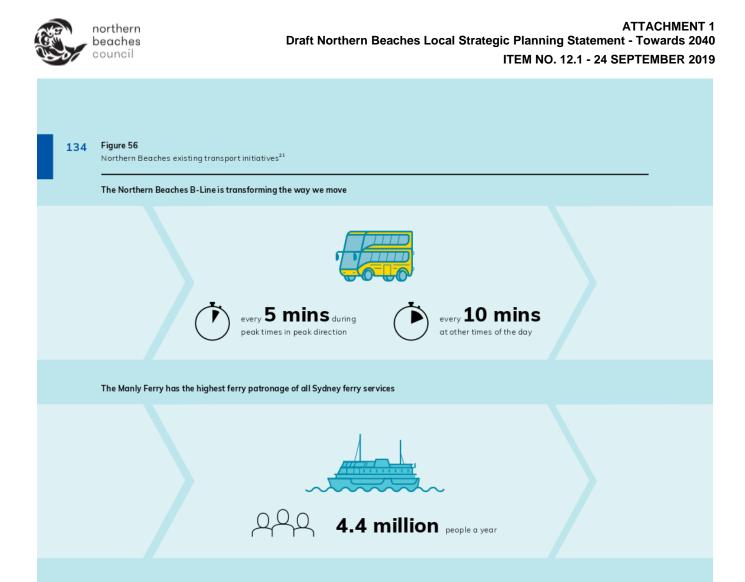
133

Most people in the LGA travel to work by car and private car use is higher than the Greater Sydney average. For people travelling outside of the LGA, public transport is highest to the Sydney CBD and North Sydney while car use is highest for those travelling west (Ku-ring-gai, Ryde, Parramatta and Chatswood) or north around Mona Vale. Trends are showing a shift towards increased use of public transport. Coordinated land use and transport planning for the Northern Beaches supports an efficient multimodal transport network that includes walking and cycling, shared transport and on-demand services.

Our focus on strategic centres will incorporate planning for high-frequency public transport links into and out of the Northern Beaches and between strategic centres to work towards the targets set out in Move.

Figure 55 Northern Beaches aspirational transport targets²⁰



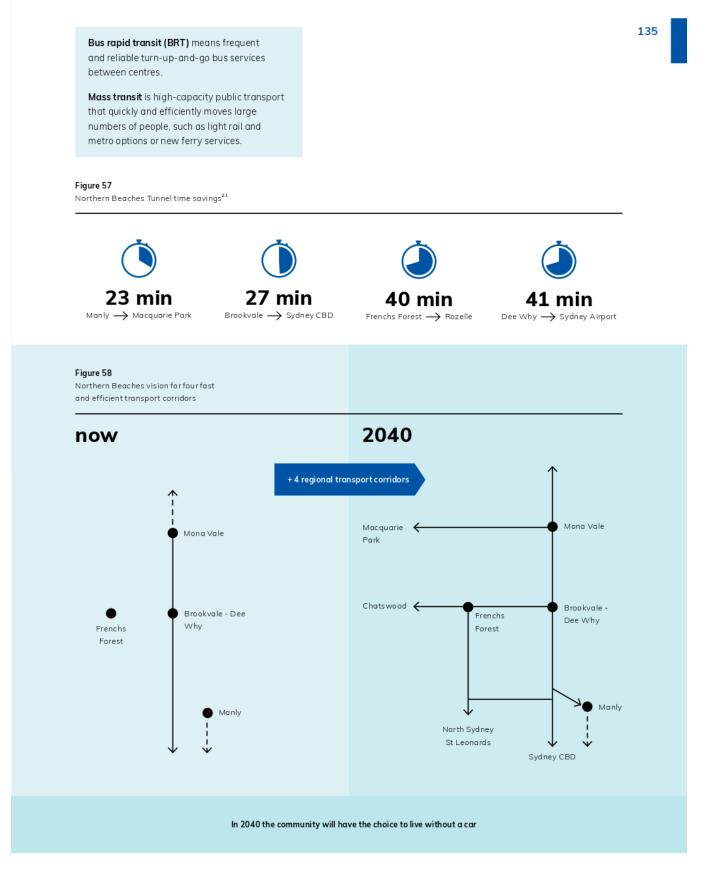


Regional public transport priorities for the Northern Beaches include improved bus services that will transition to bus rapid transit (BRT) and opportunities for mass transit:

- Brookvale-Dee Why to Frenchs Forest and Chatswood will provide access to jobs on the Eastern Economic Corridor, Sydney Metro Northwest and rail interchanges at Chatswood, Epping and Hornsby. This will respond to recent and planned growth in Dee Why, Brookvale and Frenchs Forest.
- Mona Vale to Macquarie Park will open access to jobs in Macquarie Park and Macquarie University and Macquarie Park rail stations. It will respond to the limited public transport in the LGA's north.
- Brookvale-Dee Why to Manly will improve access to ferry services to Sydney CBD, already used by 4.4 million people a year, the highest ferry patronage of all Sydney ferry services (May 2018-April 2019)²¹, and connect Manly to lower Northern Beaches suburbs. It will enable people to visit Manly without their car and support planned growth at Brookvale.
- Newport to Sydney CBD (the B-Line) will create a 24-hour bus service on the coastal corridor. The B-Line will eventually transition to BRT.
- Beaches Link Tunnel will connect the Northern Beaches to Sydney CBD, North Sydney and St Leonards. Express bus services will connect to Sydney Metro and the rail network, and more than five kilometres of cycleways and pedestrian paths will connect Seaforth, Balgowlah and Manly to Northern Beaches Hospital. The Beaches Link Tunnel will serve the LGA's west as the B-Line serves the east.

These transport initiatives will also improve access to beaches, coast walks, popular tourist areas, night-time activity.



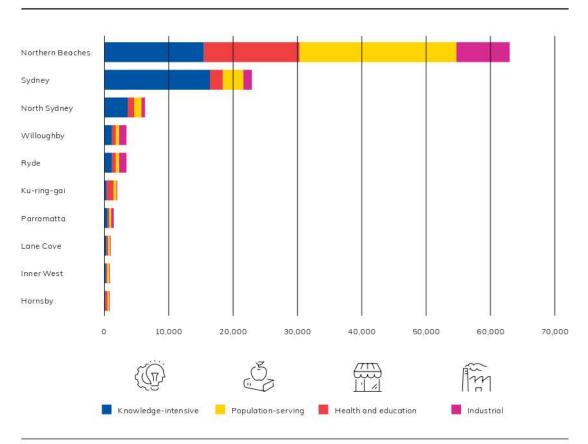






6 Figure 59

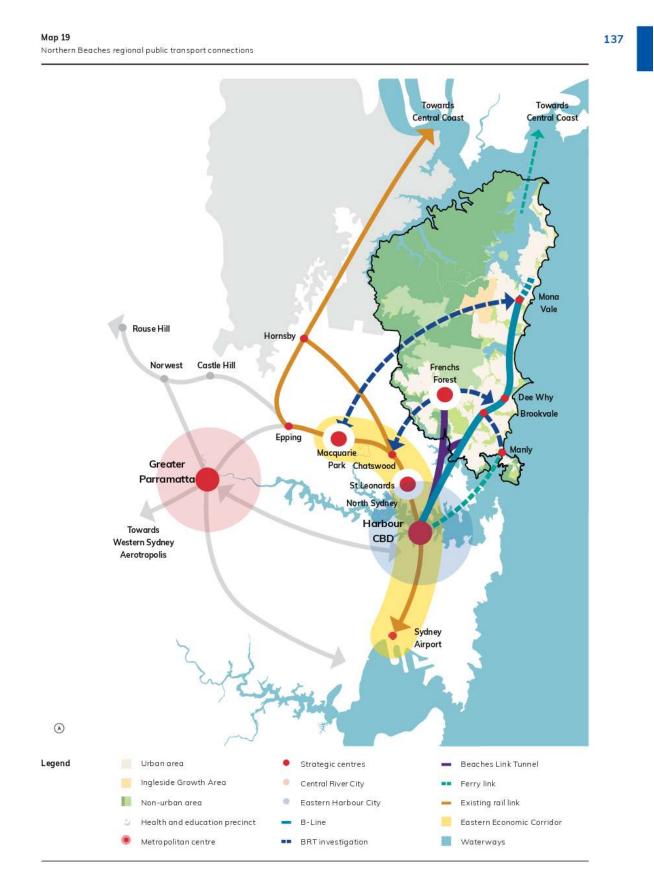
Resident jobs by type and location - Northern Beaches LGA 2016



Local business, Freshwater







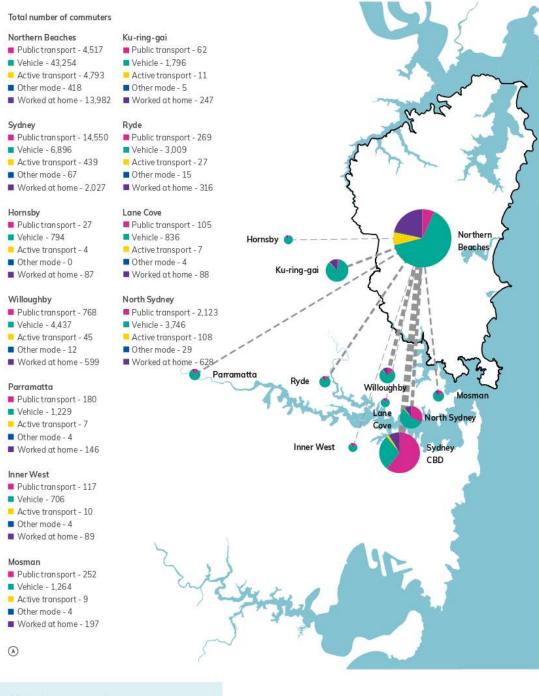
Draft Local Strategic Planning Statement 2019



138

Map 20

Place and method of travel to work - Northern Beaches LGA 2016²³



Work patterns are changing

More people are traveling to major employment centres as the number of people employed in professional and financial services is increasing



Principles

139

- Develop high-frequency public transport connections between strategic centres and in and out of the Northern Beaches.
- Focus growth within 800m of highfrequency public transport.
- Sequence development with necessary infrastructure and services.
- Preserve potential future transport interchanges and corridors.
- Respond to opportunities and implications arising from new transport infrastructure.

No.	Action	Time	Partner
19.1	Prepare and implement a public transport plan, LEP transport study and LGA- wide land use infrastructure implementation plan to improve public transport; align transport and growth; and address network capacity limitations	I	DPIE TfNSW
19.2	Develop LEP and DCP controls that incorporate these above studies and create good internal amenity for developments along main roads and future transport corridors	S	
19.3	Better link Brookvale-Dee Why to Frenchs Forest and Chatswood by improved bus services by 2020 followed by BRT to support development at Frenchs Forest	SM	TfNSW Forest Coaches
19.4	Create better bus links between Mona Vale and Macquarie Park, followed by BRT	SM	TfNSW Forest Coaches
19.5	Extend the B-Line to Newport and transition to BRT	S	TfNSW
19.6	Implement BRT between Manly and Brookvale-Dee Why	М	TfNSW
19.7	Support the Beaches Link Tunnel with public transport and investigate opportunities in areas subject to change		TfNSW
19.8	Investigate new ferry connections to places such as Clontarf		TfNSW
19.9	Investigate, identify and protect public transport corridors and future routes and interchanges by air, water and land	М	TfNSW DPIE
19.10	Align State and local government priorities so that:	М	TfNSW
	a. two east-west connections are in the Greater Sydney city-serving network		
	b. Manly to Brookvale link supports the Greater Sydney city-serving network		
	c. the Beaches Link Tunnel connects to the Greater Sydney strategic road network		





Priority 20

Sustainable local transport networks

As the LGA moves towards a multi-modal transport system, coordinating land use and transport planning and extending the reach of the regional transport network will make it easier to walk, cycle, catch public transport or use shared vehicles. It will connect neighbourhoods to larger centres where there is a greater range of employment, services and facilities, and other destinations such as schools and beaches.

Walking and cycling

While only 5% of trips to work are on foot or by bicycle, Move sets targets to double these trips by 2038. This is pertinent given that obesity rates (21.5 per 100) are higher on the Northern Beaches than the North District average (18 per 100)¹⁶.

Our Walking Plan and draft Bike Plan support walking and cycling for shorter trips and for the start and finish of trips on other modes of transport. This will be achieved through safe and connected footpath and cycling routes, improved public domain (such as street furniture, lighting and shade), suitable end-of-trip facilities such as bike parking and electric vehicle charging points.

Local bus network

Local bus services vary across the LGA and are limited in isolated areas. Poor timetabling, coverage and facilities disconnect the network, and many local services are operated by private transport providers. We will continue to review local bus connections to identify ways to improve the network. For example, our Hop Skip and Jump Bus service in the LGA's south is used by approximately 350,000 passengers each year²⁴.

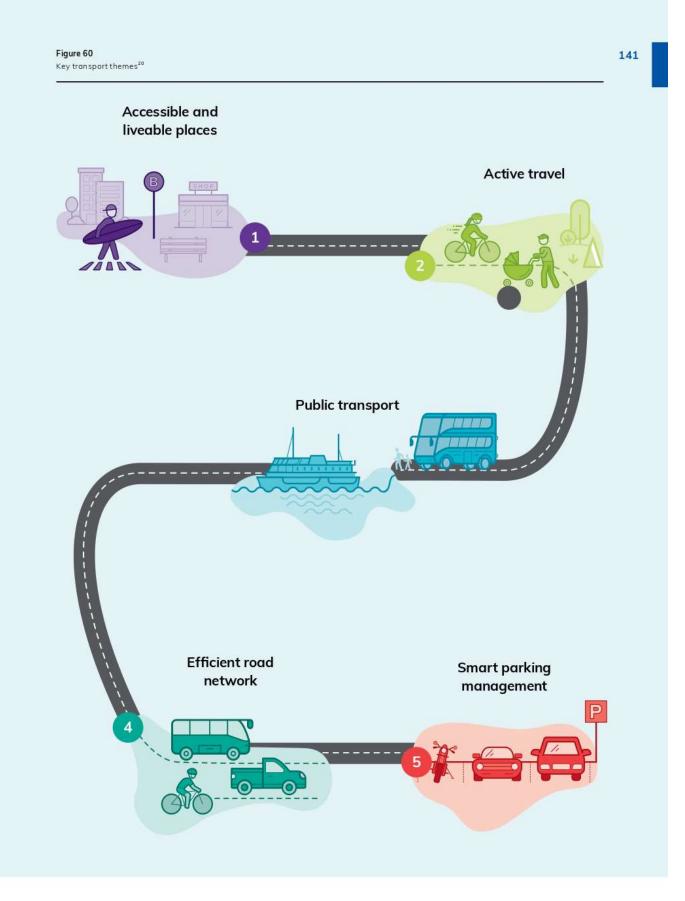
Innovative and emerging technology

New modes of transport, such as electric bikes, on-demand services and car share extend the reach of the transport network. Together with smart technology and autonomous and electric vehicles, these modes will help to reduce reliance on non-renewable fuels (see P7).

On-demand point-to-point transport services are being trialed at Mona Vale and Manly. Keoride is a pick-up service that extends the reach of the B-Line while FerryConnect (UberPool) in Manly extends the reach of ferry services. Car share services are growing, with Go Get increasing by more than 400 members in the Northern Beaches in 2018²⁵.

We will engage with State agencies, the community and the private sector to trial new systems and technology, as required under our Shared Transport Policy.







Map 21 Northern Beaches cycling network





Principles

- Coordinate land use and transport to support public transport, cycling and walking.
- Prioritise safe cycling routes separated from motor vehicle traffic within five kilometres of strategic centres or connecting to local centres, villages and destinations such as schools and beaches.
- Prioritise walking infrastructure within two kilometres of strategic centres and 800 metres of local centres or connecting to local centres, villages and destinations such as schools and beaches.
- Improve local bus connections that extend the reach of the regional transport network.
- Support smart technology, such as trials of new systems to move around more efficiently.
- Ensure new developments support active and public transport.

No.	Action	Time	Partner
20.1	Implement Move, our Walking Plan and Shared Transport Policy and prepare and implement a bike plan, public transport plan, parking plan, smart communities framework and pedestrian access and mobility plans	S	TfNSW
20.2	Develop LEP and DCP controls that incorporate these above studies; support active travel and emerging technology in new developments, such as minimum standards for end of trip facilities, bike parking and car share and to support workplace travel plans; and reduce parking requirements in centres well-serviced by public transport in exchange for public benefit	S	
20.3	Investigate improvements to transport interchanges such as ferry wharves and bus stops to support multi-modal trips	М	TfNSW
20.4	Investigate new safe cycling routes separated from traffic within five kilometres of strategic centres or connecting to local centres, villages and destinations such as school and beaches, including regional cycle routes in the Greater Sydney Principal Bicycle Network: Brookvale-Dee Why to Chatswood; Manly to Mona Vale; Manly to Spit Bridge; Mona Vale to Frenchs Forest; and Terrey Hills to Gordon/Pymble	S - L	TfNSW
20.5	Prepare place plans that encourage active travel and use of emerging technology, such as public domain improvements and bike parking	0	
20.6	Increase uptake of schools in the Northern Beaches Active to School initiative to encourage walking and cycling to school	0	DOE





Road space and facilities to match changing community needs

By re-designing existing streets to be more efficient, more people, goods and services can be accommodated in limited space, creating safer and more attractive spaces to move around.

Movement and place

Future Transport 2056, the Greater Sydney Region Plan and the North District Plan identify a movement and place framework that considers how best to use road space to improve the liveability and safety of places. The framework acknowledges that the needs and expectations of the community change for different street environments.

Centres and villages are people-orientated, where public transport, walking, cycling and small-vehicle freight access are important. Manly, for example, is a busy place with less car use and more pedestrians. Pedestrianised laneways have activated the town centre while creating a great place for people.

Local streets need to be safe for people to walk or cycle. These differ from key transport corridors, such as Pittwater Road, that must efficiently move people and goods. The hierarchy and function of various roads shape opportunities for movement and place.

Reducing conflict between road users and using road space more efficiently – for example, through pedestrianised walkways in centres, dedicated bus lanes or separated cycleways – will make it safer and easier for people to walk, cycle or use public transport.

Urban freight

By 2036, freight movements in Sydney will grow by 50%, due to an increase in supermarket deliveries, residential deliveries and increased waste collections²⁶. This increases pressure on transport networks and industrial and urban services land to support last mile delivery – the final stage of the journey in which goods travel to a destination – and hubs such as black warehouses and vertical warehouses.

Freight connections in the LGA are constrained and distance to Sydney Airport, Port Botany and the future Western Sydney Airport is a challenge. Vehicles over 19 metres are prohibited on Sydney Road, the Spit Bridge and Warringah Road. This increases travel times, adds to the cost of deliveries and requires smaller trucks. Time restrictions on the delivery of goods and truck movements in areas such as The Corso in Manly currently meet commercial and residential demands but will be a challenge as delivery and freight movements increase.

Freight and servicing demands impact the transport network with limited kerbside space, loading dock provisions and service-based uses (for example, tradespeople) competing for space. Transport for NSW data shows that demand for kerbside spaces are greatest between 10am - 2pm, with underutilised kerbside spaces outside of peak periods. These spaces are often in pedestrianised areas. There is a need to balance the use of the road space, for example, by applying the movement and place framework.

The Beaches Link Tunnel will connect the Northern Beaches to the Sydney road network for the first time, improving freight movements. Central freight and delivery hubs at strategic centres or near employment centres could reduce the prevalence of delivery vehicles on local roads, improve efficiency and prioritise pedestrians. We will look to influence the delivery of goods and services in quieter and less polluting ways, including active travel such as electric-assisted cargo bikes in pedestrianised areas. We will also aim to address the negative impacts of freight, such as congestion during peak periods, by prioritising freight delivery times to optimum delivery windows.

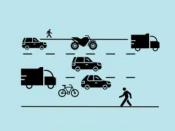


northern beaches council

Figure 61

Movement and place framework²⁷

145



Movement corridors





Vibrant streets





Local streets



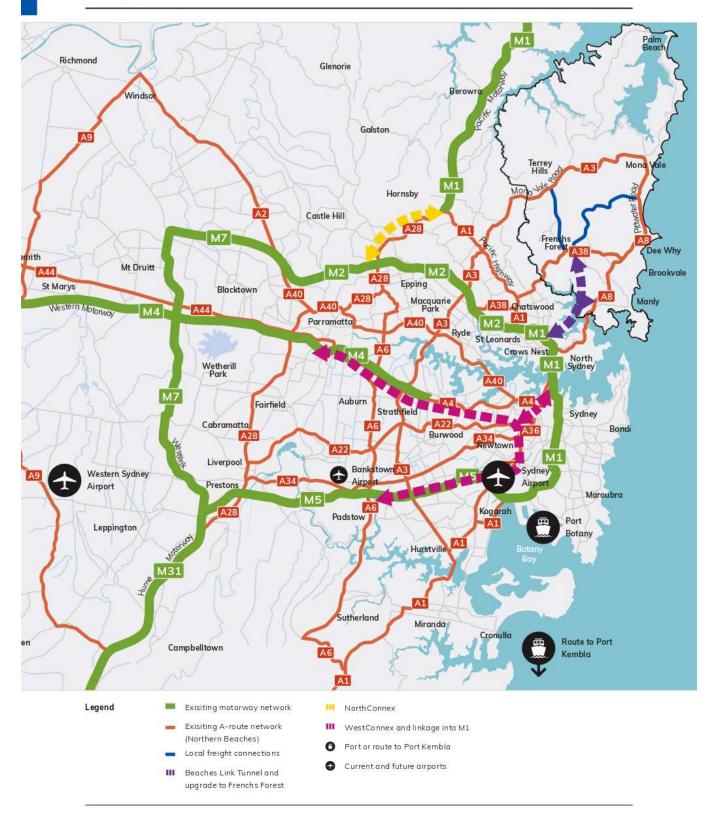


Places for people





146 Map 22 Greater Sydney road network 2019²⁸





Principles

- Coordinate land use and transport to improve amenity and support the safe and efficient movement of people, goods and services.
- Prioritise pedestrians over cars in centres to create places where people want to spend time.
- Provide for the efficient movement of freight and deliveries and protect freight corridors.
- Ensure safe and efficient loading and unloading facilities in new developments.

No.	Action	Time	Partner
21.1	Implement Transport for NSW's movement and place framework through completing action plans for parking, road network, road safety, freight and public transport to coordinate land use and transportation; improve accessibility and walkability; and reduce congestion in and around centres	SM	TfNSW
21.2	Develop LEP and DCP controls that address loading facilities and clearance heights for freight, delivery and waste collections; parking rates to reduce car dependency near public transport; noise mitigation on freight corridors; and requirements for car share and electric vehicles	S	
21.3	Investigate opportunities for consolidated urban freight hubs either on Council-owned land or private property	М	





Jobs and skills

The LGA's strategic centres underpin the Northern Beaches economy.

Well-planned strategic centres stimulate economic activity, provide jobs closer to home and use infrastructure more efficiently, while local centres are essential for the local population to access goods and services.

We will continue to strengthen the local economy, improve access to jobs and plan for vibrant mixed use centres that support local industries and innovation.

Planning priorities

- Priority 22 Jobs that match the skills and needs of the community
- Priority 23 Frenchs Forest as a sustainable health and education precinct

• Priority 24 Brookvale as an employment and innovation centre

- Priority 25
 Dee Why as a thriving cosmopolitan
 centre by the sea
- Priority 26 Manly as Sydney's premier seaside destination
- Priority 27
 Mona Vale as the contemporary, urban heart of the north
- Priority 28
 Safeguarded employment lands
- Priority 29 A thriving, sustainable tourism economy
- Priority 30
 A diverse night-time economy







Jobs that match the skills and needs of the community

149

Increasing local job opportunities and ensuring efficient access to these jobs will strengthen the local economy. Nearly 6,000 jobs were added to the Northern Beaches workforce between 2011-2016, mainly in Manly. Over the next 20 years, we expect to see employment grow in Brookvale (Warringah Mall and industrial precincts), Frenchs Forest (including the business park) and Warriewood-Mona Vale (including industrial precincts). Jobs in local centres will increase to meet the needs of the local population.

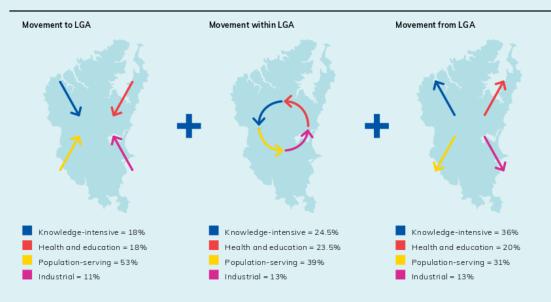
Figure 62

Job target - Northern Beaches LGA^1

Centre	Jobs - 2016 estimate	Jobs - 2036 target (low-high)	Growth	Industries
Frenchs Forest	9,300	12,000 - 13,000	2,700 - 3,700	Health
Brookvale-Dee Why	20,000	23,000 - 26,000	3,000 - 6,000	Industrial, urban services and retail
Manly	5,000	6,000 - 6,500	1,000 - 1,500	Retail with tourism focus
Mona Vale	4,300	5,000 - 6,000	700 - 1,700	Retail, commercial and light industrial

Figure 63

People travelling to and from the Northern Beaches for work by industry type 2016





The Northern Beaches has the highest proportion of local jobs filled by local residents and residents working locally in Greater Sydney. Despite this, there is the risk of a gap between the types of local jobs and the skills of residents. For example, most residents work in the knowledge-intensive sector yet future job growth is projected to be in health and education and populationserving jobs, reflecting a local economy without a major commercial centre or mass transit.

The Northern Beaches has the **second highest number of businesses of all LGAs in NSW,** after the City of Sydney²⁹.

The high proportion of small businesses reflects entrepreneurialism where locals create opportunities to live and work locally. This is a key strength for the LGA. Opportunities for the Northern Beaches include:

- strengthening strategic centres as high amenity hubs that deliver more jobs, services and activities closer to where people live, supporting the 30-minute city
- enhancing local centres to provide local retail and small office functions to serve the local community and business networks
- leveraging infrastructure investments such as the B-Line, Northern Beaches Hospital, east-west public transport upgrades and Beaches Link Tunnel connecting to the Eastern Economic Corridor
- rethinking what it means to work locally by supporting work from home, community facilities such as meeting rooms, satellite offices, co-working spaces, libraries and jobs in the Metropolitan Rural Area (see P4)
- aligning employment areas with future industries of growth to attract and retain businesses and support targeted industries such as tourism, arts and creative, nighttime economy, smart technology and sustainable development (see P7)

- facilitating innovative environments to support and connect industries such as flexible floorspace in local centres to co-locate commercial uses with social infrastructure, such as libraries or community work hubs, to support start-up businesses
- providing high-quality and industry appropriate commercial and industrial floorspace focusing on flexible division of floorspace that supports small businesses
- planning for age-friendly centres that provide employment opportunities to support independence later in life and centres and businesses that cater to the needs of older people.

New development in strategic centres must contribute to the overall function of the centre and specific directions outlined in priorities 23-27.



Map 23

Northern Beaches job opportunities



Mona Vale Opportunity to serve changing demographics with more diverse social vport retail and health offerings while supporting the growing start-up and small business community. The adjoining industrial precinct will continue to support the high value marine industry and urban services. Warriewood Narrabe Dee Why **Frenchs Forest** Opportunity to increase Increase connectivity to the the vibrancy and diversity Eastern Economic Corridor. of population-serving Opportunities for growth functions including civic include health, professional Belrose administration, health and services, logistics and fitness, recreation, food innovation. and beverage, retail and start-ups or home-based orestville businesses. Brookvale Opportunity to grow high skilled Manly employment and innovation-led Opportunity to continue as a recreation change across its existing base of and tourism destination with high-value urban services, manufacturing, diversification with high value niche distribution, automotive and industries including natural health. construction industries. Opportunity renewable energies, fintech to grow and develop the regional and edutech by leveraging strong retail function in line with changing connections with the CBD. consumer behaviour. 0 Legend Urban area Strategic centre Employment hub 34 Ingleside Growth Area Health and education precinct 1 dot = 100 jobs (existing) National park Local centre Public transport and active travel connection Major public parkland/bushland Coastal village 0 Metropolitan Rural Area (MRA) Forest village



Principles

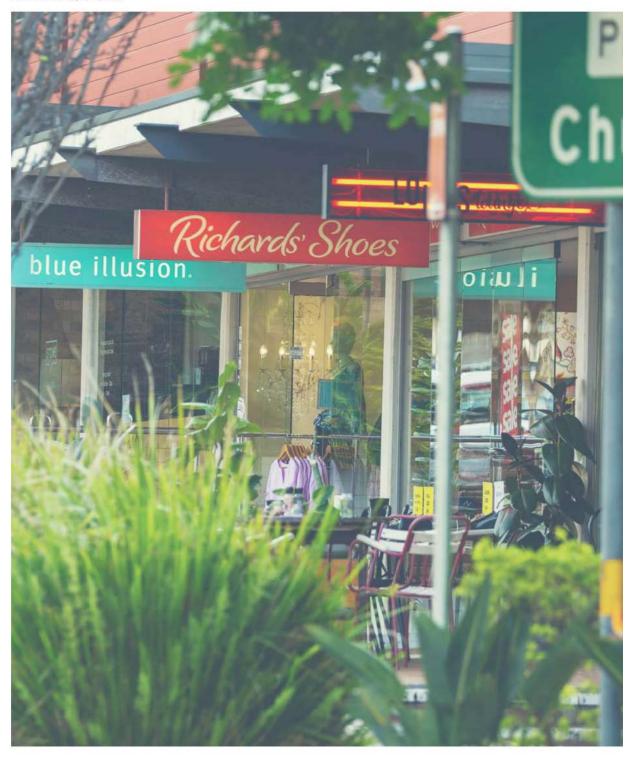
- Increase local job opportunities supported by efficient public transport, cycling and walking.
- Maintain and increase employment floor space and ensure residential development within strategic and local centres does not diminish employment or economic opportunities.
- Attract jobs that match the skills of residents and support new business formats such as co-working.
- Improve the amenity and design of centres to meet the needs of the whole community.
- Enhance the population-serving role of smaller local centres.
- Support targeted industry sectors and foster innovative clusters.
- Foster business networks and partnerships to connect, promote and grow business.

No.	Action	Time	Partner
22.1	Complete the LEP employment study and develop LEP and DCP controls to grow job opportunities; review commercial and retail land supply; review industrial lands; promote innovation; and improve amenity and design of centres and non-residential buildings	I	
22.2	Prepare and implement an economic development plan that responds to the findings of the LEP employment study to build local economic capacity	S	
22.3	Review planning controls to support specific industry sectors and to implement the Arts and Creativity Strategy	М	
22.4	Prepare and implement a destination management plan, smart communities framework and night-time economy strategy	М	
22.5	Prepare place plans for local centres that support their population-serving role	0	
22.6	Identify opportunities for Smart City pilots, projects, partnerships and grant funding	SM	
22.7	Deliver the transport projects identified in P19	SM	TfNSW





Local businesses, Mona Vale







Frenchs Forest as a sustainable health and education precinct

Frenchs Forest will be a new strategic centre for the Northern Beaches. It will be a low-carbon health and education precinct with high efficiency in energy, water and waste, anchored by Northern Beaches Hospital and potentially a university.

Planning for Frenchs Forest aims to create space for around 3,700 new jobs and 4,360 new homes over the next 20 years, including affordable and diverse housing, with no building higher than the hospital (41 metres). The public domain will include a central piazza with cafes, outdoor dining and community uses. New open space will retain mature vegetation with a 25% tree canopy target.

High-frequency bus routes will connect Frenchs Forest to destinations in the LGA, Chatswood and Sydney CBD and new pedestrian and cycling infrastructure will create a walkable centre where people are less dependent on their car. We will target a Green Star-rating for the centre. The NSW Department of Planning, Industry and Environment is leading the planning of the precinct in collaboration with Council, the Greater Sydney Commission, NSW Health, NSW Department of Education and Transport for NSW.

Stage One includes 2,000 new homes and 4,000 new jobs (2,000 from the hospital and 2,000 from the town centre). Future phases of development will depend on the Beaches Link Tunnel and BRT from Brookvale-Dee Why to Chatswood (see P19).

Frenchs Forest will transition from a low density area where 90% of homes are separate dwellings and most people use their car to a sustainable and liveable centre with more jobs, stimulated by the hospital and Frenchs Forest business park. Workers will be able to connect to the town centre, across Warringah Road, Wakehurst Parkway and Forest Way, in such a way that the town centre, hospital, Forest Way shopping centre and business park all function together. Impacts from these changes on other centres in the LGA will also be investigated, including opportunities to take the pressure off Manly as the largest knowledge-intensive employment hub in the LGA.

Figure 64

Key facts - Frenchs Forest Planned Precinct





Figure 65

Illustrative map for Frenchs Forest Planned Precinct

155



Legend (and Green Star Community

Note: areas designated for types of land uses are indicative and conceptual only. Refer to specific mapping, strategies and plans.

Figure 66

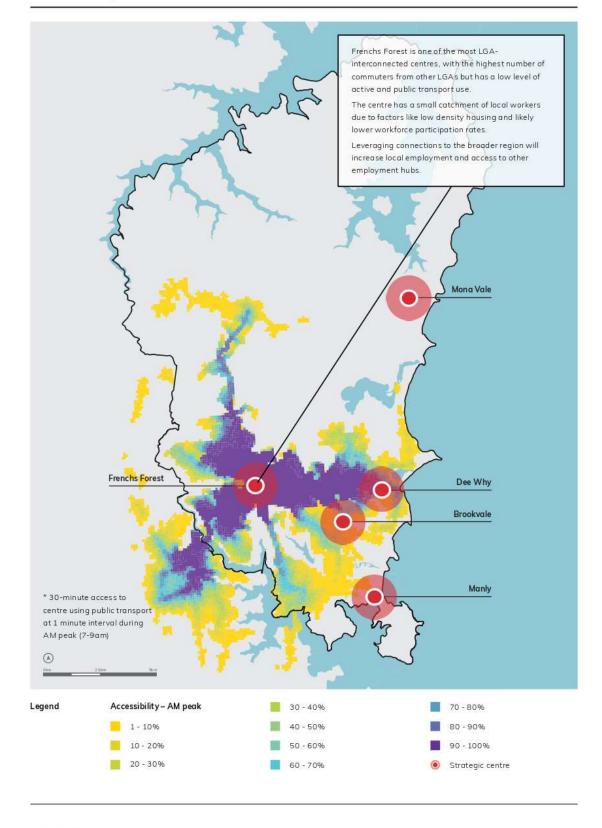
Photomontage - Frenchs Forest Town Centre





Map 24

Frenchs Forest strategic centre 30-minute catchment³⁰





Principles

- Establish Frenchs Forest as an active mixed-use strategic centre with a variety of housing and employment options integrated with the area's bushland.
- Deliver a low-carbon precinct with high efficiency in energy, water and waste.
- Strengthen Frenchs Forest business park, focusing on attracting health-related businesses.
- Ensure the business park, town centre, hospital and Forest Way shopping centre function together.
- Use Northern Beaches Hospital as a catalyst for new health and education jobs and businesses.

- Provide high amenity, safe and accessible public spaces and facilities that are active day and night.
- Transition new housing appropriately to existing low density residential areas.
- Prioritise walking in the town centre and provide connections to the broader active and public transport network.
- Improve public transport and regional cycling routes to Chatswood and Spit Bridge.

No.	Action	Time	Partner
23.1	Finalise and implement Frenchs Forest Precinct Plan including Green Star Communities application; public domain strategy; town centre DCP; and special infrastructure contributions plan and support:	I	DPIE
	• a low-carbon precinct with high efficiency in energy, water and waste		
	• design excellence through a competitive design process for the town centre		
	 criteria required by the Green Star-rating, including increased BASIX targets for all new dwellings 		
	 affordable rental housing targets of 15% in the town centre and 10% for the remaining rezoned area 		
	• a 30% landscaped area site control and 25% tree canopy target		
23.2	Master plan and deliver Warringah Aquatic Centre as a state-of-the-art education and recreation precinct	SM	DPIE DOE NSWH
23.3	Investigate opportunities to boost Frenchs Forest business park; connect workers to the town centre; and ensure the hospital, town centre and business park function together	S	
23.4	Investigate opportunities for a university at Frenchs Forest	0	DPIE DOE NSWH
23.5	Prepare a Section 7.11 contributions plan under the EP&A Act to identify funding for public infrastructure at Frenchs Forest	SM	
23.6	Respond to the findings of LEP studies through five-yearly updates to the Northern Beaches Hospital Precinct Structure Plan, Green Star Communities rating and LEP and DCP updates	ML	
23.7	Deliver the transport projects identified in P19	S-L	TfNSW





Brookvale as an employment and innovation centre

Brookvale supports industrial, commercial, retail, service and education sectors. It is the LGA's largest employment hub, accommodating onethird of the LGA's jobs. Most people living on the Northern Beaches can access Brookvale by public transport within 30 minutes of where they live.

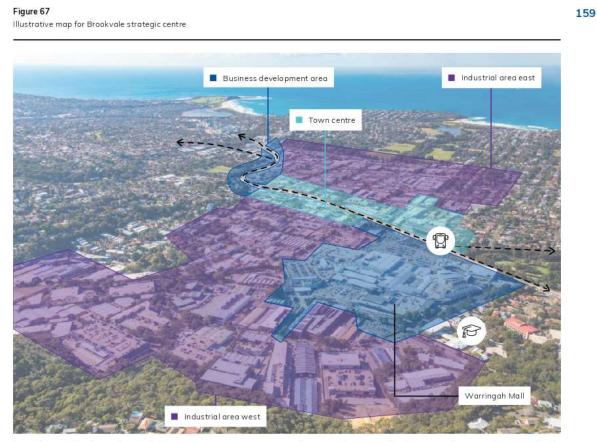
Brookvale includes Warringah Mall, one of the largest malls in Greater Sydney, and a cluster of diverse community infrastructure assets including the Brookvale Community Health Centre, a \$50 million centre opened February 2018, TAFE NSW, and Brookvale Oval, where a \$36 million centre of excellence was announced early 2019.

The draft Brookvale Structure Plan, exhibited in 2017, supports an employment-based centre that is a great place to live and work, with more night-time activities for the young and culturally diverse population. The Structure Plan aims to revitalise Pittwater Road and create convenient, attractive and safe walking, cycling and public transport connections, including green links to the bush and the sea.

Brookvale has a tradition of innovation – it was once known as Sydney's surfboard making capital and was formerly home to early production of 'ugg' boots. We will continue to support opportunities for innovative and creative industries. Warringah Mall will expand and better integrate with the fabric and life of Brookvale. A new town centre activity-point outside the mall could include civic and cultural functions and a multi-use community facility, incorporating coworking or economic development spaces. We will determine the right mix of industrial and urban services for the centre and investigate opportunities for creative industrial uses.

Three-quarters of commuter trips to Brookvale-Dee Why are by car, mainly from areas within the Northern Beaches. Better roads, public transport and regional cycling routes will help to realise Brookvale's potential as the Northern Beaches' major strategic centre, particularly to support commuters from other strategic centres such as Frenchs Forest and Mona Vale, who mainly travel to Brookvale by car.





Legend for and Green Star Community

Note: areas designated for types of land uses are indicative and conceptual only. Refer to specific mapping, strategies and plans.

Figure 68

Photomontage - Brookvale town centre

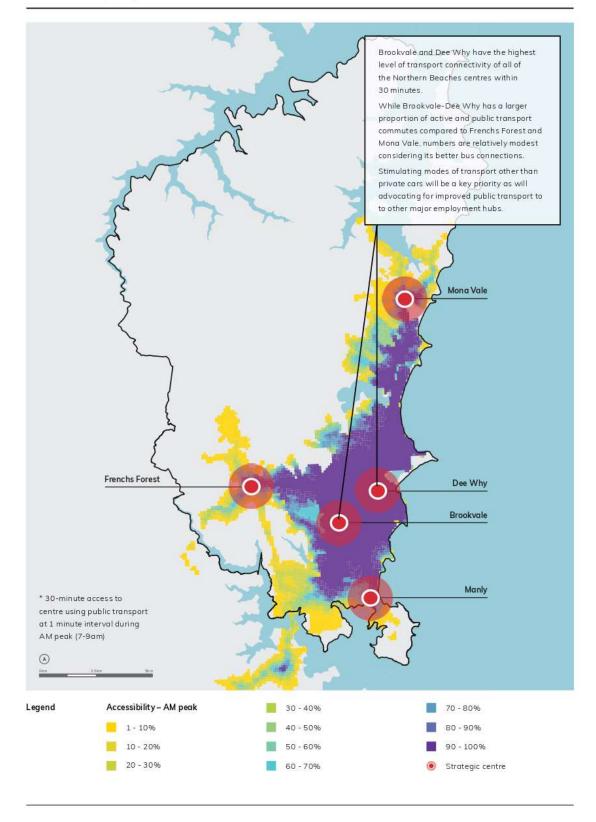






) Map 25

Brookvale - Dee Why strategic centre's 30-minute catchment∞





S-L

TfNSW

161

Principles

	upport Brookvale as an nployment-based centre.	•	Enhance tree canopy and provide green link Brookvale Park, Warringah Mall and the B-		
	stablish a town centre-activity point and ben space outside of Warringah Mall.	•	Enhance Brookvale's identity and define gateways to create a sense of arrival.		
 Support the expansion of Warringah Mall and integrate it with surrounding built form. Bring life back to the streets, including revitalisation of the main commercial strip on Pittwater Road. Ensure appropriate interfaces between 		 Improve public transport and regional cycle networks to Sydney CBD, Frenchs Forest, Mona Vale and Manly. Support the night-time economy, creative a innovative industries and public art. Preserve the industrial integrity of the 			
di	fferent land uses.		industrially-zoned land.		
No.	Action			Time	Partner
24.1	Complete the Brookvale-Dee Why transport st with infrastructure on Pittwater Road and to su to and from the jobs and services in the employ	ladr	ort how people move	I	TfNSW
24.2	Review planning controls for key sites such as Mall and better link Brookvale and Dee Why	Wai	rringah	S	
24.3	Respond to the findings of the LEP studies, revi Plan and develop LEP and DCP controls to opti	mis	e growth of Brookvale as a	S	
	transit supportive employment centre, the cent	re o	f focus for the LGA		

24.5 Deliver the transport projects identified in P19





Dee Why as a thriving cosmopolitan centre by the sea

Dee Why is a population-serving, mixed use centre that offers housing, retail, civic, service and commercial functions. It has one of the most densely populated, multicultural communities on the Northern Beaches offering a cosmopolitan lifestyle and night-time activity.

Residents and workers benefit from Dee Why's proximity to Dee Why Beach, Dee Why Lagoon Wildlife Refuge and Stony Range Flora Reserve. It contains buildings of heritage significance including the Civic Precinct with Dee Why Library, Civic Centre and the surrounding landscape recognised for their State heritage significance (see P18).

Recent housing growth in the town centre is based on planning controls that have been in place since 2000. Although an increase in capacity was allowed on two key sites since 2008, only one of these sites has been completed (the Meriton site, known as Site B).

The current vision for Dee Why Town Centre is articulated in Warringah LEP 2011 and Dee Why Town Centre Master Plan 2013. These are being implemented through public domain upgrades and updates to planning controls to stimulate development that will fund and supply open space, including:

- street and public open space upgrades including Walter Gors Park, Redman Road Plaza, streetscape improvements and proposed upgrades to Triangle Park
- redevelopment of Council-owned land, subject to current investigations, including:
 - Key Site A, a new mixed use development and roadway between Howard and Oaks Avenue through the Council-owned car park
 - b. Civic Site to provide community facilities and services including performing arts and entertainment, cuisine and retail

- redevelopment of private lands, facilitated by development bonuses in exchange for public open space at the ground level, including:
 - c. Key Site B, now known as the Meriton site, including a town plaza and open arcade
 - d. **Key Site C,** a roadway between Oaks Avenue and Pacific Parade through the former Woolworths site
 - e. Key Site D, a heavy vehicle turning lane for vehicles turning left from Pittwater Road onto Pacific Parade
 - Key Site E, a rear lane, landscaped open space and better connections for sites west of Pittwater Road.

Changes to planning controls require resolution of a planning proposal with the NSW Department of Planning, Industry and Environment. New LEP and DCP controls will improve provisions for design excellence, sustainability, retail activation, public domain and housing mix. New development will integrate with the new B-Line service and fund improvements to stormwater infrastructure, traffic and streetscapes.

Although no significant increase in density is proposed, there is estimated capacity for an additional 1,400 dwellings, based on current and proposed planning controls. This growth, along with the recent increase in population, calls for place planning to guide how the area will change.



Figure 69

Illustrative map for Dee Why town centre

163



Legend Mew connections A-E Key Sites

Note: areas designated for types of land uses are indicative and conceptual only. Refer to specific mapping, strategies and plans.



Dee Why

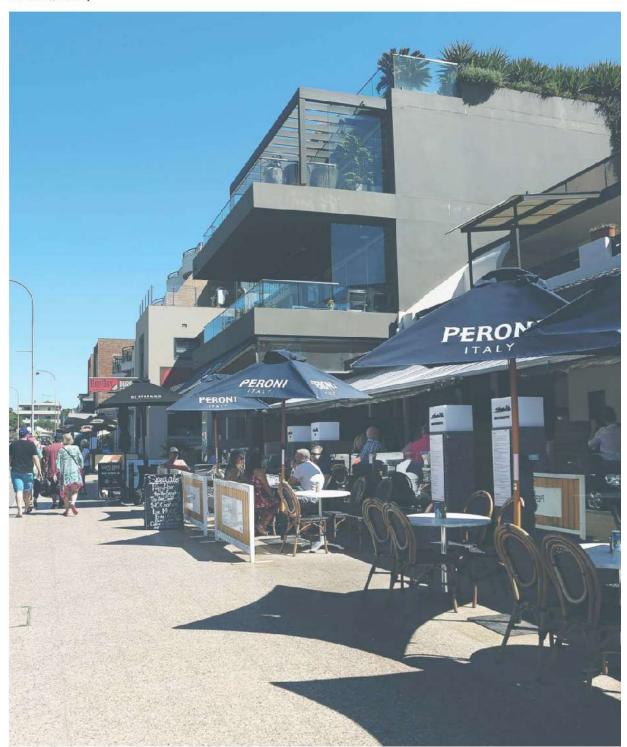


Principles

- Support Dee Why as a mixed centre for business, community, civic and residential uses.
- Maintain and reinforce Dee Why's role as the LGA's civic centre.
- Establish sunny, public spaces, including generous footpaths.
- Activate ground floor level retail uses and appropriately interface development with public areas.
- Provide at least two levels of nonresidential uses for employment.
- Increase street tree planting and minimise impacts on Dee Why Lagoon South Catchment.
- Improve public transport to the Sydney CBD, Frenchs Forest and Manly.
- Support night-time and cultural opportunities.

No.	Action	Time	Partner
25.1	Implement the planning proposal for Dee Why Town Centre Master Plan 2013 to support Dee Why as a mixed use centre	I	DPIE
25.2	Develop LEP and DCP controls for Dee Why to respond to the findings of LEP studies	S	
25.3	Investigate Dee Why in the place planning program to respond to growth and transformation	МL	
25.4	Deliver new roads, laneways and open space identified in the Dee Why Town Centre Master Plan 2013 and the Section 7.11 Plan for Dee Why and Delivery Program	S	
25.5	Investigate the feasibility of redeveloping the Howard and Oaks Avenue car park (Site A) and a new civic hub (Civic Site)	S	
25.6	Deliver the transport projects identified in P19	S-L	TfNSW





The Strand, Dee Why





Manly as Sydney's premier seaside destination

Manly is characterised by its frontages to the harbour and beach, iconic Norfolk Island pines and older historic buildings and generally low-scale development. The world-famous ocean beach is linked to Manly Cove and East and West Esplanades by The Corso flanked by quaint laneways and heritage buildings. The town centre is bordered by popular foreshore areas that connect to Sydney Harbour National Park at North Head and Cabbage Tree Bay Aquatic Reserve. These elements are evidence of Manly's history and social significance.

The town centre offers cultural, tourist, retail and entertainment uses. It is also a residential and economic centre, supporting the highest population density and the highest proportion of health and education and knowledgeintensive jobs of all of the LGA's centres. Manly has the youngest demographic and is the most culturally diverse of the LGA's centres, supporting mostly professionals and managers.

Manly is an important tourist destination and the LGA's only designated late-night precinct. These uses must be balanced with the needs of Manly's residents and other specialised uses which include the International College of Management Sydney, Manly Art Gallery and Museum (one of 40 regional and public galleries in NSW), Australia's first hospice for young adults, Soldier On (a veterans' rehab centre at North Head) and Royal Far West (a provider of health and education services for country children and their families). Manly 2015 Master Plan supports a mix of cultural, tourist, retail and entertainment through urban design upgrades to streets, lanes and plazas, including pedestrianising streets. Some of these projects are complete and some are identified as future projects in the Northern Beaches Delivery Program.

People in Manly are the highest users of active and public transport compared to other centres. It offers 20-minute ferry commutes to Sydney CBD, but connections to lower Northern Beaches suburbs are poor. Addressing this will improve access to Warringah Mall, the B-Line, Manly Andrew 'Boy' Charlton Aquatic Centre and sportsgrounds at North Manly, making it easier for people to travel to Manly without a car and reducing demand for parking in the centre. This will be supported by a regional cycling route to Dee Why and improved end-of-trip facilities, such as bike storage.







Note: areas designated for types of land uses are indicative and conceptual only. Refer to specific mapping, strategies and plans.



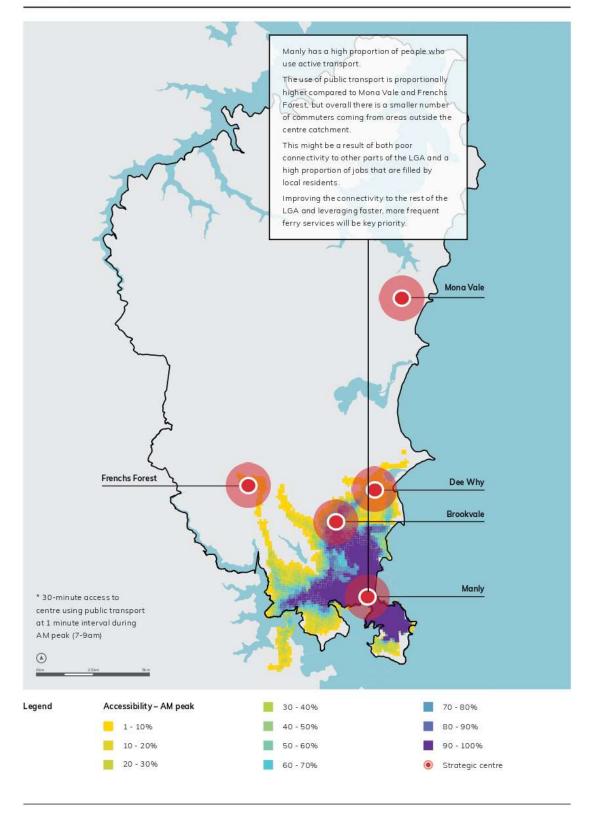
The Corso, Manly





58 Map 26

Manly strategic centre 30-minute catchment³⁰





Principles

- Balance competing land uses in Manly to serve the needs of workers, residents and visitors.
- Protect and enhance Manly's character, identity and social significance.
- Balance short-term accommodation for visitors with affordable housing options for residents.
- Maximise sunshine on the beach, harbour and foreshore areas, The Corso and East and West Esplanades.
- Improve public amenity and revitalise Manly's laneways.
- Diversify the night-time economy and minimise conflicts with residential uses.

- Continue Manly's function as a tourism precinct and enhance naturebased tourism opportunities.
- Improve commuter facilities at Manly
 Wharf and active and public travel to
 lower Northern Beaches suburbs.
- Support co-working spaces for professional jobs.
- Retain a strong pedestrian-focused core.
- Improve links to future uses at North Head and the former Manly Hospital site.

No.	Action	Time	Partner
26.1	Prepare a place plan for Manly and develop LEP and DCP controls to respond to LEP studies, thematic history study, West Esplanade heritage activation plan, destination management plan and night-time economy to balance competing uses	S	
26.2	Undertake a heritage review to identify and list buildings and conservation areas with heritage significance and review group listings as part of place planning	S	Heritage DPC
26.3	Deliver the transport projects identified in P19	S-L	TfNSW





Mona Vale as the contemporary, urban heart of the north

Mona Vale has a local, coastal character with a village atmosphere. It sits at the end of the B-Line and is only a 10-minute walk from the beach. It supports community, residential, retail, commercial, educational and industrial uses as well as many open spaces, such as Village Park, Kitchener Park, Mona Vale Skate Park, Winnererremy Bay and publicly and privately owned golf courses.

Mona Vale services people living in the LGA's north, including Newport, Avalon and Palm Beach, and could be transitioned from a predominantly low density centre to a place that offers more diverse housing and job opportunities, especially catering to the ageing population.

Most commuters come to Mona Vale from other coastal suburbs by car. Extending the B-Line service to Newport, improving east-west bus services to Macquarie Park and strengthening the local bus network is essential. Mona Vale has the highest number of people working from home compared to other areas in the Northern Beaches, which presents opportunities to support co-working and digital infrastructure that facilitates working from home. The new arts centre at Mona Vale Civic Centre (including a community gallery, teaching spaces and studios) will see the centre transition and adapt to the changing needs of the community.

Place planning for Mona Vale will revitalise public areas and focus on Mona Vale as a centre for people living in the north of the LGA.

Principles

- Support Mona Vale as an employment and service centre for people living in the north of the LGA.
- Revitalise and improve public areas, including potential for a civic heart in the Village Park.
- Strengthen Mona Vale as a transport interchange by improving active and public transport connections to surrounding areas.
- Create appropriate interfaces at land use boundaries.
- Improve public transport to Macquarie Park and the Sydney CBD.

No.	Action	Time	Partner
27.1	Prepare a place plan for Mona Vale and develop LEP and DCP controls to respond to LEP studies and support revitalisation of the centre	S	
27.2	Repurpose Mona Vale civic centre into an arts centre, including community gallery, teaching spaces and studios	S	
27.3	Deliver the transport projects identified in P19	S-L	TfNSW



Figure 71

Illustrative map for Mona Vale strategic centre



Note: areas designated for types of land uses are indicative and conceptual only. Refer to specific mapping, strategies and plans.

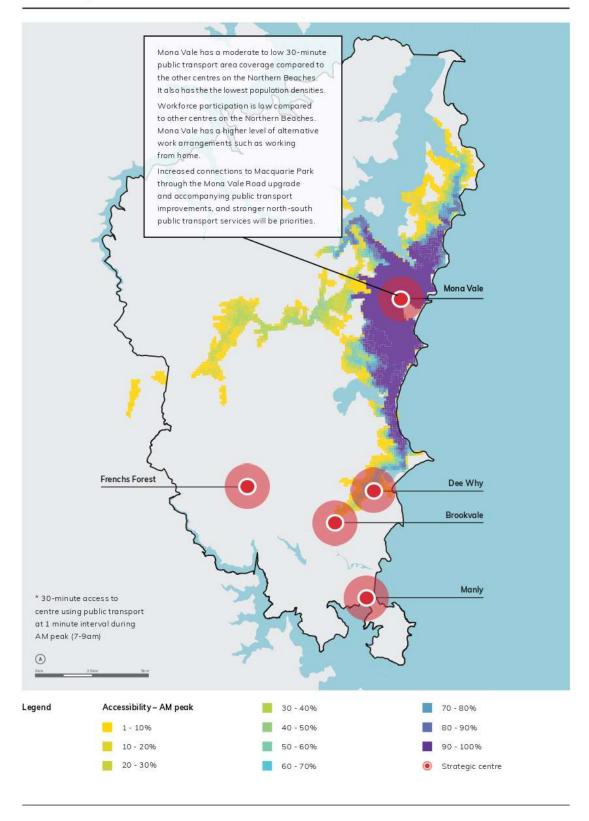


Mona Vale Library



Map 27

Mona Vale strategic centre 30-minute catchment³⁰







Commuter Stop, Mona Vale







Safeguarded employment lands

Industrial jobs make up 15% of local jobs. With the rise of online retailing, the value of employment lands for logistics close to residential areas is increasing. A new mix of businesses in the LGA's employment lands creates the risk of these areas becoming a catch-all for various uses. The right balance of businesses will protect the integrity of employment lands and avoid creative-led gentrification.

We define employment lands as lands zoned for industrial, business or similar purposes. These lands cater for a range of activities from major freight and logistics, heavy manufacturing, light industry to urban services and other creative uses. Business parks also cater for offices. The Greater Sydney Commission defines urban services as industries that enable the city to develop and its businesses and residents to operate, such as concrete batching, waste recycling and transfer, printing, car repairs, construction depots, and utilities (electricity, water, gas supply).

In the Metropolitan Rural Area, businesses include nurseries and landscape supplies as well as in the Austlink Business Park, Tepko Road Industrial Estate, Kimbriki and Belrose resource recovery centres, and telecommunications and electrical facilities (see P4). Mona Vale's marine industry cluster provides specialised services to the Australian east coast.

The North District has the lowest amount of industrial land in Greater Sydney and demand is growing. One-third of the District's industrial land (189 hectares) is in the Northern Beaches. Brookvale is the largest industrial precinct in the North District and makes up 46% of industrial land on the Northern Beaches³¹. Frenchs Forest Business Park is the fourth largest (developed) business park in Greater Sydney and makes up 54% of the 100 hectares of business park zoned land on the Northern Beaches³¹.

As the population grows, there is increasing pressure to rezone employment lands, particularly at Brookvale and Mona Vale industrial precincts and Frenchs Forest Business Park. Some businesses can relocate to cheaper areas with fewer land use conflicts. Others, however, cannot – they rely on proximity to local populations or a nearby centre. While some of these industries do not always provide a higher number of jobs, they are essential for their operational role and function. For example, while the wholesale sector is not a major employer, it is the third-largest contributor to the local economy in terms of value-add (\$1.1 billion)³².

All industrial precincts in Northern Beaches LGA are fully developed with no development in the pipeline. While some of these industrial precincts are small, and only appear to be a small part of the industrial lands supply of the region, they are critical. Future planning must balance local needs, a transitioning economy and high-value industries. This requires businesses to capitalise on advanced manufacturing, automation, vertical warehousing and last-mile delivery models without sacrificing opportunities for value-added economic growth and employment outcomes.

The approach for managing industrial and urban services land, as identified in the North District Plan, is to 'retain and manage' industrial and urban services land in the Northern Beaches. No employment land will be rezoned for a higher purpose.



Figure 72

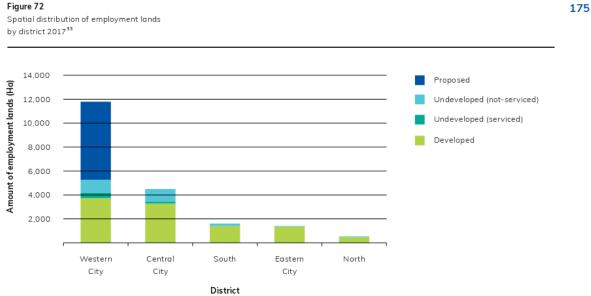


Figure 73

Historical spatial distribution of zoned employment lands by North District LGA 2017³³

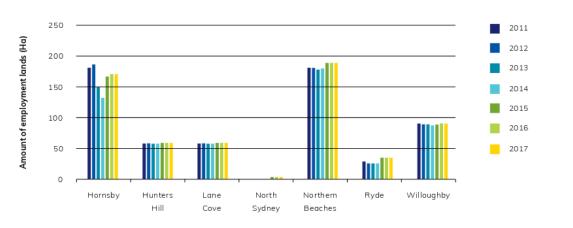




Figure 74

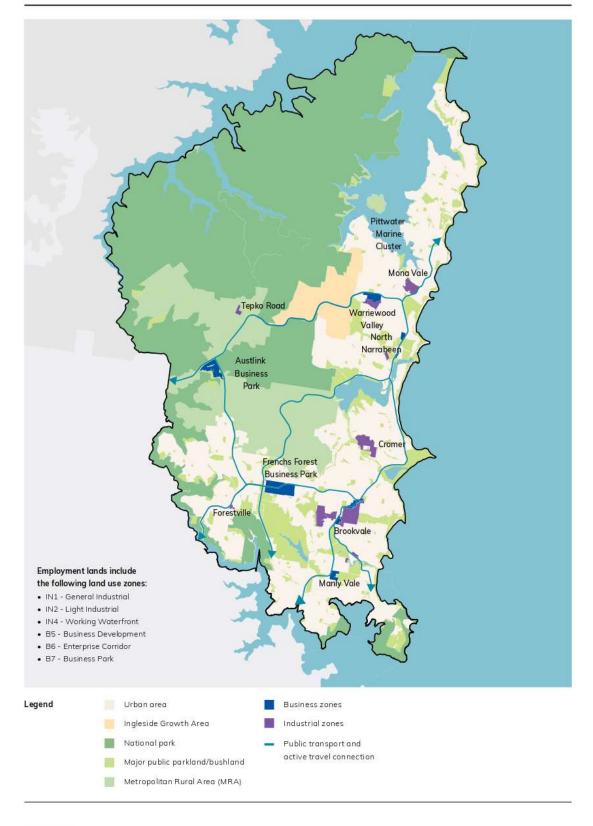
Importance of employment lands





Map 28

Northern Beaches employment lands





Principles

- Safeguard employment land from noncompatible uses, particularly residential and mixed-use development.
- Restrict subdivision and strata titling of industrial lots to prevent further fragmentation.
- Focus on economic outcomes that support the population rather than job numbers.
- Support industrial and urban services by managing the interface with adjoining land uses and ensuring residential development does not sterilise industrial or urban services uses.
- Support efficient use of land and built form that responds to changes in technology and innovation.

No.	Action	Time	Partner
28.1	Complete the strategic review of industrial and urban services land (part of the LEP employment study) and develop LEP and DCP controls to protect the integrity of employment land; address land use interfaces; and facilitate innovative built form	I	GSC
28.2	Seek exclusion of operation of State Environmental Planning Policy (Housing for Seniors or People with a Disability) 2004 in employment lands	S	
28.3	Review and update the draft Brookvale Structure Plan to respond to the findings of the employment study and determine the right mix of industrial and urban services for the centre	М	





A thriving, sustainable tourism economy

The Northern Beaches is a valuable tourism asset for Greater Sydney, and more broadly NSW and Australia. The local tourism and hospitality sector contributes twice as many jobs and revenue to the Northern Beaches economy compared to the NSW average. Around 3 million people visit the Northern Beaches every year. Most of these are domestic visitors, and although international visitors account for only 36% of our visitors, they stay longer than the NSW average³⁴.

Northern Beaches tourism economy

- Accounts for 13% of the LGA's jobs for young people (three-quarters of workers are under 44).
- Contributes more than \$2.5 billion into the local economy in 2016-17.
- Accounts for 9% of all industry sales³⁴.

Manly is the main tourism precinct on the Northern Beaches, voted the best beach in the world by TripAdvisor for the second year in a row and the Manly Ferry is listed as #3 'must do' in Sydney after Sydney Harbour Bridge and Sydney Opera House. Cruise ships also offer full or half-day excursions to Manly. Beyond Manly, tourism offerings are offered through to Palm Beach in the north.

There are many attractions and destinations throughout the LGA, including a new 36-kilometre Coast Walk from Manly to Palm Beach that will connect to one of the world's greatest urban walks – an 80-kilometre walk between Bondi to Manly, a collaborative initiative between three levels of government. Tourist accommodation ranges from boutique style accommodation, large international hotels and backpacker accommodation in Manly through to a caravan park at Narrabeen, campgrounds at the Basin and cabins at Currawong on Pittwater. The shared economy (e.g. Airbnb) has diversified offerings in terms of type and location.

Diversifying tourism offerings beyond Manly, Palm Beach and the beaches, and beyond the summer peak, will strengthen the tourism economy. Opportunities include diversifying accommodation offerings, such as eco-accommodation (glamping), nature-based tourism and experiences such as the Coast Walk, and Aboriginal culture-based tourism. Continued amenity, vibrancy and safety improvements in centres, as well as a focus on nighttime activities and artistic and cultural offerings, will enhance visitation beyond the coast. A destination management plan for the whole Northern Beaches will guide visitor economy development and growth.





Tourism experience themes - Northern Beaches LGA³⁵ 179

 Art and creativity

 Nature

 The Northern Brachers

 Greining world-class brach and

 Brachard experiences with

 Brachard experiences with



World Food Markets, Manly





Map 29





Principles

w	nable a strong tourism economy • vhile maintaining quality of life and rotecting the environment.			
ac • Pr	 Ensure a range of well-designed tourist accommodation in appropriate locations. Promote and integrate coastal walks with centres, transport and accommodation. Improve access and connectivity by air, land and sea, including wharves, ferry services and public transport north of Manly. 			
No.	Action		Time	Partner
29.1	Complete the destination management plan and employment study and use these to inform new LEP and DCP controls and planning processes to remove barriers to the tourism economy		I	*
29.2	2 Deliver and integrate the Coast Walk and 80km Bondi to Manly Walk with centres, public transport and accommodation		S	State agencies councils
29.3	Build capacity with the tourism industry		0	**
29.4	Prepare a public transport plan to improve tourism connections and deliver the transport projects identified in P19		S	TfNSW
29.5	5 Prepare an open space and recreation strategy and night-time economy strategy; finalise and implement the Arts and Creativity Strategy		S	
29.6	5 Prepare place plans that support the tourism economy; enhance visitor experiences; mprove connections to the Coast Walk; and where relevant, address competing land uses		0	

*Tourism Aust, Destination NSW, Local tourism industry

** Tourism Aust, Destination NSW, NPWS





Priority 30

A diverse night-time economy

We define the night-time economy as economic activity between 5pm and 4am. It includes bars, clubs, events and restaurants, as well as services such as transport, supermarkets, childcare, gyms, training and education facilities.

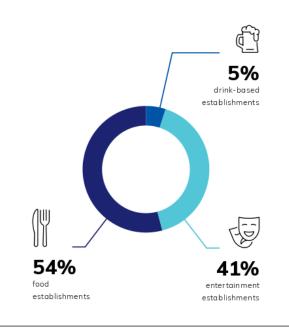
In NSW, the night-time economy had a sales turnover of \$38 billion in 2016-17 based on figures from food, drinks and entertainment business, and employment. It represents 8.5% of the economy in NSW and 26% of employment in Australia overall³⁶.

Manly is the only designated **late-night** entertainment precinct in the LGA.

Suburbs such as Forestville, Belrose, Narrabeen, Newport, Killarney Heights, Eleanora Heights, Freshwater and Fairlight could be investigated for evening activities, while more diverse night-

Figure 76

Night-time economy - Northern Beaches LGA (2016-17)³⁶



Towards 2040

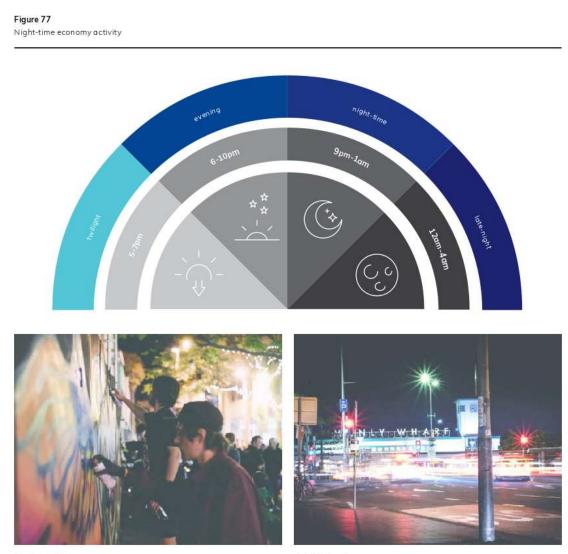
time offerings in places that will grow and change – like Dee Why, Brookvale or Frenchs Forest – is fundamental, especially to support shift workers at Northern Beaches Hospital.

The types of night-time activities are changing – from fast-casual dining, eat streets and popup food trucks to events, festivals and late-night shopping, or late-night gyms. Diversified night-time activities also avoid reliance on alcohol-focused businesses and can help to address anti-social behaviour in Manly, Mona Vale and Newport.

We will prepare a night-time economy strategy to manage the economy's sustainable growth while minimising potential land use conflict. This will create flexibility to maximise employment, turnover and tourism benefits while also delivering active and vibrant strategic and local centres. It will identify solutions to facilitate live entertainment, arts, creative and cultural opportunities in appropriate locations.

The strategy will address safety, late-night transport, noise and light pollution and consider established precincts like Manly, seasonal precincts in the northern end of the peninsula, emerging precincts in areas of transformation such as Dee Why and specialised precincts such as the microbrewery cluster at Brookvale. It will include location-specific solutions that cater for all age groups.





Manly Market Lane

Manly Wharf



Manly Oval



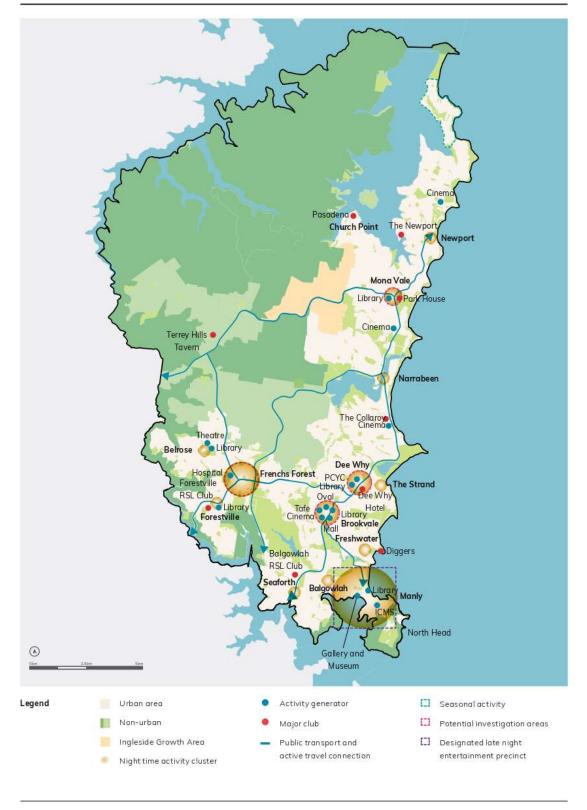
Manly Market Lane





Map 30

Northern Beaches night-time economy





 Increase trading hours for low-impact night-time activities that contribute to a diverse range of

night-time activities in appropriate locations.

185

Principles

- Broaden the range of night-time activities.
- Minimise land use conflict and prevent more sensitive uses such as residential from sterilising night-time opportunities in centres.
- Improve late-night public transport to places with night-time activities.

No.	Action	Time	Partner
30.1	Prepare a night-time economy strategy that responds to the employment study, economic development plan, destination management plan and community safety plan to broaden the range of night-time activities	L	*
30.2	Review late-night venue controls in Manly DCP and prepare new location-specific LEP and DCP controls that address late-night venues; the shift towards smaller venues; live music; change agent noise controls; safety; flexible trading hours and barriers to night-time temporary uses, arts, cultural and creative uses	S	
30.3	Prepare place plans, precinct plans and activation plans that support social, practical and functional activities in the evening and night-time, including: a. Manly place plan to respond to alcohol-related violence, anti-social behaviour and tension between competing land uses	S	Local businesses
	 Mona Vale place plan to respond to anti-social behaviour Frenchs Forest Planned Precinct to help meet the needs of shift workers at Northern Beaches Hospital 		
30.4	Prepare and implement a community safety plan for Manly to improve safety and community perceptions		
30.5	Investigate mechanisms to manage and monitor the night-time economy such as reviewable conditions of consent and approval processes for events on community land and footway dining		
30.6	Prepare and implement a public transport plan that investigates improved late-night transport and deliver the transport projects identified in P19		TfNSW

*NSW Police; Northern Beaches Liquor Accord; Liquor Gaming and Racing; Community Safety Committee.



Implementation

Immediate imperatives

 Local housing strategy (mid-2020); employment study (end-2019); social infrastructure study (end-2019); environment study (mid-2020); transport study (mid-2020).

Collaboration

- Collective action from all stakeholders, various levels of government and the private sector as identified throughout Towards 2040.
- Collaboration through inter-agency workshops; northern planners meetings; traffic committee meetings; and quarterly meetings with NSW Department of Planning, Industry and Environment.

Studies, strategies and plans

 New and updated studies, strategies, plans, guidelines, and policies, including place plans, will align with Towards 2040. Similarly, updates to Towards 2040 will consider findings from new studies, strategies or plans.

Planning controls

- The new Northern Beaches LEP and DCP will align with Towards 2040.
- Towards 2040 includes a number of actions to prepare new LEP and DCP controls. These will be addressed in our initial LEP and DCP, where possible. Where further work is required, it will be addressed in future amendments.
- Planning proposals to amend the LEP, prepared by Council or applicants, must accord with the Environmental Planning and Assessment Act 1979.
- Planning proposals must include an assessment of whether they will give effect to Towards 2040. In making this assessment, the priorities and related principles must be considered together. It is not appropriate to justify a planning proposal based on a single element of Towards 2040.

Project delivery

 Capital works projects and actions that contribute to Towards 2040 are outlined in our delivery program.

Funding and investment

 Actions in Towards 2040 will be addressed in the four-year delivery program and implementation of the LGA-wide Section 7.12 plan, and Section 7.11 plans for Dee Why, Warriewood Valley and Frenchs Forest.

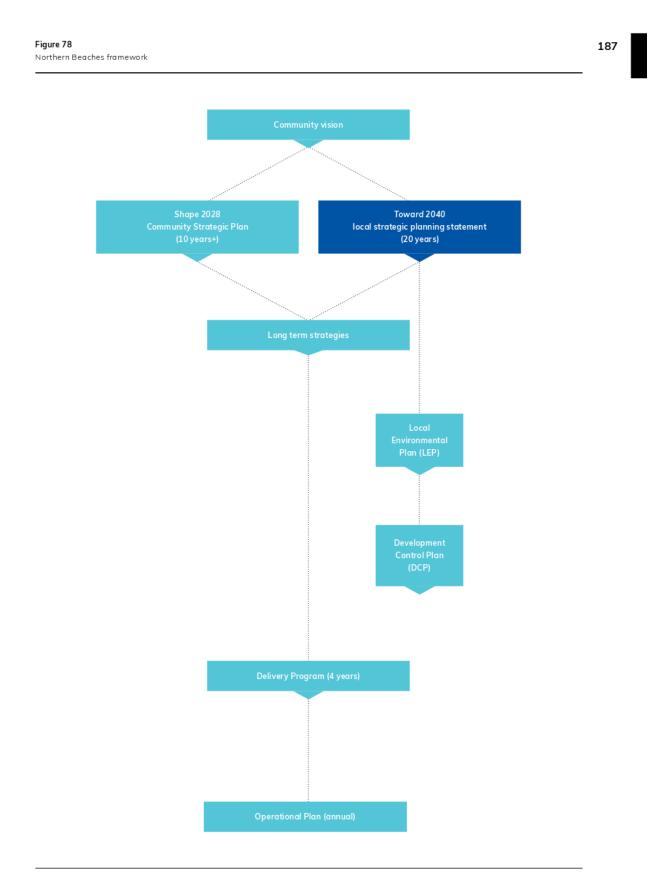
Monitoring and reporting

- Following adoption of Towards 2040 by Council, baseline reporting will be established in August 2020 to align with end-of-term reporting for Shape 2028.
- Council will report on the actions of Towards 2040 annually.
- Council will report against the Towards 2040 measures and Shape 2028 through the existing Integrated Planning and Reporting framework under the Local Government Act 1993 every four years from 2024.
- Some measures identified in Towards 2040 rely on Census data only available every five years. The next Census is due in 2021.

Review

 Towards 2040 is a living document that will be updated as required and reviewed at least every seven years.







Measures

ection	Measure	Direction	Measure
م میرین Landscape	 Maintain or improve waterway health Maintain area of native vegetation on public and private land* Maintain the Metropolitan Rural Area Increase the urban tree canopy* 	Infrastructure and collaboration	 Increase % of dwellings within 30-minutes by public transport to a metropolitan or strategic centre* Maintain or increase resident satisfaction with lobbying on behalf of the community
	 Trees planted public land: target 5,000 per year Increase % of dwellings with access to open space*: target low-medium density dwellings within 400m of open space and high-density dwellings within 200m of open space Increase availability of sports fields, including out of school hours 		
	 Reduce carbon emissions for electricity, transport, waste and gas Reduce drinking water use per person Increase diversion of waste from landfill: target 85% diversion by 2040 Reduce waste generation rate per person 		
	 Increase actions implemented to address natural hazards Maintain or increase resident satisfaction with management of local flooding Maintain regional air quality* 		



Direction	Measure	Direction	Measure
People People	 Increase the number of people participating in tertiary education Increase resident satisfaction with: provision of childcare services facilities and services for youth facilities and services for older people facilities and services for people with disabilities community centres Increase the number of public facilities and assets that are accessible Increase community pride and connectedness: community belonging people to call on for assistance quality of life living on the Northern Beaches Increase resident satisfaction with: arts and cultural facilities community events and festivals Increase the number of dwellings: target 3.400 additional dwellings by 2021 (medium and long term targets to be developed in the local housing strategy) target 4.360 additional dwellings in Frenchs Forest by 2038 Increase social housing and affordable rental housing: target 10% affordable rental 	Connectivity Connectivity Jobs and skills	 Increase active and public transport patronage: target 25% public transport by 2038 target double active travel trips by 2038 Increase % of dwellings within 800m of a public transport stop, with a scheduled service at least every 15 minutes between 7am and 7pm on a normal weekday Reduce the proportion of space allocated to private vehicles in strategic centres Increase gross regional product Increase the number of businesses Increase the number of jobs: target 12,000-13,000 jobs in Frenchs Forest by 2036 target 23,000-26,000 jobs in Brookvale-Dee Why by 2036 target 6,000-6,500 jobs in Manly by 2036 target 700-1,700 jobs in Manly by 2036 Maintain zoned employment lands
Great places	 housing in planning proposals Increase resident satisfaction with keeping town centres and villages vibrant Increase the number of heritage items and conservation areas 		



Glossary

30-minute city is a planning concept for a city in which people can easily access the places they need to visit on a daily basis within 30 minutes travel (by public transport, walking or cycling) from where they live.

Active travel (transport) means trips by physical active means, like walking and cycling and other non-motorised vehicles.

Biodiversity offsets compensate for how development impacts biodiversity through the Biodiversity Offset Scheme.

Biodiversity stewardship sites (formerly known as biobanking) enable biodiversity credits to be traded and used as an offset against the impact of proposed development on biodiversity values.

Building Sustainability Index (BASIX) is a NSW Government scheme to regulate the energy and water efficiency of residential buildings.

Broad centre catchments are aggregations of ABS Statistical Areas Level 2 and have been used for reporting data in the demographic analysis.

Community hubs support co-location of a range of community facilities and services in a single location (e.g. social services, community centres, libraries, recreational opportunities, customer service).

Community participation plan will make it clearer and easier for members of the community to understand how they can participate in planning decisions and addresses requirements for community participation that are set out in the EP&A Act.

Co-working spaces are shared workplaces that are used by professionals working in different knowledge related industries, often freelance and self-employed workers.

Development Control Plan (DCP) contains detailed planning and design controls that support the planning controls in a local environmental plan.

Economic corridor includes multi-LGA precincts with a high concentration of jobs, linking multiple centres.

Employment precincts are areas where jobs are located, including centres, industrial precincts and business parks. Employment lands are lands zoned for industrial, business or similar purposes in planning instruments. For the Northern Beaches, they include the following land use zones: IN1 General Industrial, IN2 Light Industrial, IN4 Working Waterfront, B5 Business Development, B6 Enterprise Corridor, B7 Business Park.

Environmental Planning and Assessment Act 1979 (EP&A Act) institutes the system of environmental planning and assessment for NSW.

Freight hub is where deliveries can be consolidated for subsequent delivery into a centre either by foot or appropriate smaller vehicle to reduce the number of vehicles travelling into centres.

Freight includes goods or cargo transported by truck, light commercial vehicles (eg. vans and utes), cycle couriers, rail, aircraft or ship.

Growth infrastructure compact is a new approach to an infrastructure delivery plan that is codesigned and co-delivered by State and local governments together with industry to better align growth with infrastructure delivery.

Green Star is an internationally recognised sustainability rating system, which provides independent verification of sustainable outcomes throughout the life cycle of the built environment.

Health and education precincts can form parts of centres and include major hospitals, universities and medical research institutions, and connect the community to health and education services. Northern Beaches contains a health and education precinct at Frenchs Forest.

Hop Skip and Jump Bus service is a free community bus service that operates in Manly.

Local centres (also referred to as coastal and forest villages) provide day-to-day access to goods and services. Northern Beaches contains nine local centres - Avalon, Newport, Warriewood, Narrabeen, Belrose, Forestville, Manly Vale, Balgowlah and Freshwater.

Local environmental plan (LEP) guides planning decisions at the local level through zoning and development controls, which provide a framework for the way land can be used.



Local government area (LGA) is the Northern Beaches Council administrative boundary.

Low-carbon, high efficiency precinct focuses on reducing the carbon footprint through integrating energy, water, waste, transport and building efficiency, drawing on the National Carbon Offset Standard for Precincts.

Low Rise Medium Density Housing Code allows dual occupancies, manor houses and terraces to be carried out under a complying development approval if the proposal complies with all the relevant requirements in the State Environmental Planning Policy (Exempt and Complying Development Codes) 2008.

Metropolitan Local Aboriginal Land Council (MLALC) was established to support the Aboriginal Land Rights Act 1983 to improve, protect and foster the best interests of all Aboriginal people within the MLALC area and other people who are members of the MLALC.

Neighbourhood centres are small clusters of shops and services. They are often a strip of shops larger than a small neighbourhood and smaller than a local centre.

Planned precincts are a collaborative planning process between the NSW Government and councils to coordinate jobs, housing and infrastructure. Frenchs Forest is a planned precinct.

Planning proposals are a request or intended effect of a proposed LEP or an amendment to an existing LEP.

Public domain includes places accessible to the public, either on public or private land, and includes open space, pedestrian access ways and features including building frontages and awnings over footpaths.

Section 7.11 Plan allows Council to levy a contribution for development under the EP&A Act that increases demand for public amenities and services to fund the provision of new or augmented public infrastructure. Section 7.12 Plan allows Council to levy a contribution on new development under the EP&A Act based on the proposed cost of works.

Social infrastructure includes hospitals, higher education institutions, open space, schools, emergency services, cultural facilities, GPs and medical centres, multipurpose facilities, libraries, local community facilities, childcare centres and preschools, arts and creative facilities.

State Environmental Planning Policies (SEPPs) are legal planning instruments that set out controls for how land is to be used, they deal with matters of State or regional environmental planning significance.

State Environmental Planning Policy No.70 - Affordable Housing (Revised Schemes) facilitates the development and maintenance of affordable housing in NSW.

Strategic centres vary in size, location and mix of activities. They enable access to a range of goods, services and jobs. Northern Beaches contains five strategic centres – Frenchs Forest, Brookvale, Dee Why, Manly and Mona Vale.

Tertiary education is university, technical and other vocational education and training, or TAFE.

Urban hazards result from past and present urban activities such as noise, air pollution and soil contamination.

Urban intensification means increasing urban activity in an area, for example through housing or job growth, increasing density and increasing the amount of urban development.

Urban renewal area is an area identified for development opportunities and revitalisation.

Value-add represents the value that is added of each industry sector to a defined region.

Voluntary Planning Agreement (VPA) is a voluntary planning agreement between Council and a developer to deliver public benefits.



192 References

Aboriginal Heritage Office (2019) Website.

Australian Bureau of Statistics (2016) Census.

Australian Government (2017) National Carbon Offset Standard for Precincts.

Australian Sustainable Built Environment Council (2016) Low Carbon, High Performance Report.

Council of Capital City of Lord Mayors (2016-17) Night Time Economy Research.

Create NSW (2018) Cultural Infrastructure Plan 2025.

Department of Planning and Environment (2016) Ingleside Draft Land Use and Infrastructure Strategy.

Department of Planning and Environment (2017) Low Rise Medium Density Design Guide for Complying Development.

Department of Planning and Environment (2018) Bushfire Risk Assessment for the Ingleside Planned Precinct.

Department of Planning and Environment (2019) Local Character and Place Guideline.

Department of Planning Industry and Environment (2018) Employment Lands Development Monitor.

Department of Prime Minister and Cabinet (2016) Smart Cities Plan.

Economy .ID (2019a) National Economic Indicators Series 2017-18.

Economy .ID (2019b) Northern Beaches Economic Profile.

Economy .ID (2019c) Northern Beaches Tourism and Hospitality Value 2017-18.

Ethos Urban and Otium Planning Group (2019) Northern Beaches Social Infrastructure Study – Issues and Opportunities Background Paper. Go Get (2018) Carshare Report – Northern Beaches (January–October).

Government Architect NSW (2017a) Better Placed.

Government Architect NSW (2017b) Greener Places (draft).

Government Architect NSW (2017c) Sydney Green Grid North District Spatial Framework and Project Opportunities.

Government Architect NSW (2017d) Sydney Green Grid Spatial Framework and Project Opportunities.

Government Architect NSW (2018a) Bushland and Waterways Guide (draft).

Government Architect NSW (2018b) Open Space for Recreation Guide (draft).

Government Architect NSW (2018c) Urban Tree Canopy Guide (draft).

Greater Sydney Commission (2017) Values of the Metropolitan Rural Area of the Greater Sydney Region.

Greater Sydney Commission (2018a) Greater Sydney Region Plan 'A Metropolis of Three Cities'.

Greater Sydney Commission (2018b) North District Plan.

Green Building Council of Australia (2018) Carbon Positive Roadmap.

Kinesis (2018) Northern Beaches Council Carbon Emissions and Water Analysis.

KJA (2019) Northern Beaches Local Strategic Planning Statement – Engagement Summary Report.

Manly Council (2015) Manly 2015 Master Plan.

Meridian Urban (2019) Northern Beaches – Planning for our Environment – Background Paper.

Metropolitan Councils of Sydney (2018) Resilient Sydney – A Strategy for City Resilience.



Metropolitan Local Aboriginal Land Council (2016) Community Land and Business Plan 2016-2021.

Northern Beaches Council (2013) Dee Why Town Centre Master Plan.

Northern Beaches Council (2016) Affordable Housing Needs Analysis.

Northern Beaches Council (2017a) Affordable Housing Policy.

Northern Beaches Council (2017b) Brookvale Structure Plan (draft).

Northern Beaches Council (2017c) Disability Inclusion Action Plan 2017-2021.

Northern Beaches Council (2017d) Frenchs Forest Hospital Precinct Structure Plan.

Northern Beaches Council (2017e) Sportsgrounds Strategy.

Northern Beaches Council (2018a) Arts and Creativity Strategy, Connected Community 2028 (draft).

Northern Beaches Council (2018b) Asset Management Strategy 2018–2028.

Northern Beaches Council (2018c) Shape 2028 - Community Strategic Plan 2018–2028.

Northern Beaches Council (2018d) Delivery Program 2018-2021 - Operational Plan and Budget 2018-19.

Northern Beaches Council (2018e) Freshwater Coastal Open Space Masterplan – Council Meeting 28 May 2019, Agenda Item 9.3.

Northern Beaches Council (2018f) Move – Northern Beaches Transport Discussion Paper.

Northern Beaches Council (2018g) Move – Northern Beaches Transport Strategy 2038.

Northern Beaches Council (2018h) Planning Proposal – Deferred Lands in Oxford Falls Valley and Belrose North - Council Meeting 27 March 2018, Agenda Item 10.1 (draft).

Northern Beaches Council (2018i) Urban Tree Canopy Plan (draft).

Northern Beaches Council (2019a) Clontarf Beach Landscape Master Plan (draft).

Northern Beaches Council (2019b) Coast Walk Public Art Scoping Study.

Northern Beaches Council (2019c) Coast Walk Public Art Strategy.

Northern Beaches Council (2019d) Destination Management Plan (draft).

Northern Beaches Council (2019e) Protect, Create, Live: Northern Beaches Environment and Climate Change Strategy 2038 (draft).

Northern Beaches Council (2019f) Walking Plan.

NSW Aboriginal Land Council (2018) Strategic Plan 2018-2022.

NSW Government (2016) Biodiversity Conservation Act 2016.

NSW Office of Environment and Heritage (2016) NSW Urban Heat Island to Modified Mesh Block.

NSW Office of Environment and Heritage and NSW Environment Protection Authority (2017) Risk-Based Framework for Considering Waterway Health Outcomes in Strategic Land-use Planning Decisions.

NSW Rural Fire Service (2018) Planning for Bush Fire Protection, A Guide for Councils, Planners, Fire Authorities and Developers Pre-Release Issue.

Parliament of Australia (2018) Building Up and Moving Out – Inquiry into the Australian Government's Role in the Development of Cities.

Pendleton, J (2019) Northern Beaches Community Engagement Analysis.



194 References (continued)

Phillips KPA (2019) Status Report for University RFP.

Placescore (2019) Northern Beaches LSPS Insights Report.

Resilient Sydney (2018) A Strategy for City Resilience.

Roads and Maritime Services (2018) Beaches Link Tunnel Project Update.

Roads and Maritime Services (2019) Sydney Road Network Map.

SGS Economics and Planning (2018) Greater Sydney Commission – Employment Lands Analysis.

SGS Economics and Planning (2019a) Northern Beaches Demographic Analysis.

SGS Economics and Planning (2019b) Northern Beaches Employment Study – Background Report.

SGS Economics and Planning (2019c) Northern Beaches Local Housing Strategy - Housing Issues and Opportunities Paper.

Sydney North Primary Health Network (2018) Northern Beaches Local Government Area Health Profile.

Taha, H (1997) Urban Climates and Heat Islands: Albedo, Evapotranspiration, and Anthropogenic Heat.

Transport for New South Wales (2018) Future Transport 2056.

Transport for NSW (2019) Open Data Hub.



Endnotes

195

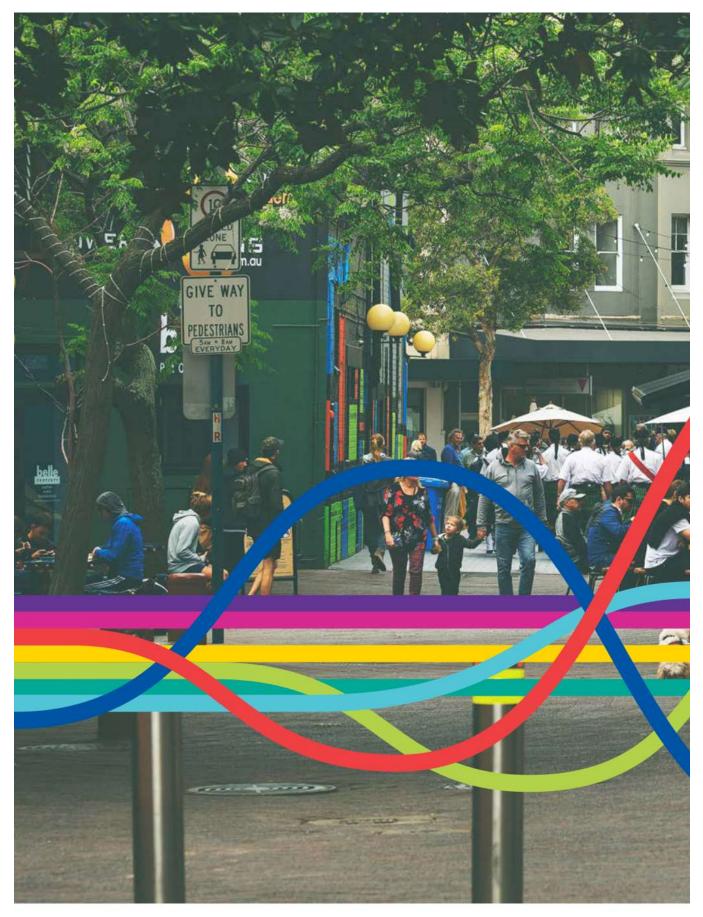
All statistics in this report are from SGS Economics and Planning (2019) Northern Beaches Demographic Analysis, unless otherwise referenced.

- Adapted from Greater Sydney Commission (2018b)
- Adapted from SGS Economics and Planning (2019c)
- ^{3.} Economy .ID (2019b)
- NSW Office of Environment and Heritage and NSW Environment Protection Authority (2017)
- Jointly prepared by Northern Beaches Council and the Environment, Energy and Science Group of DPIE, supported by the NSW Government as part of the Marine Estate Management Strategy (2018-2028) water quality initiative
- Adapted from Government Architect NSW (2017d)
- ⁷ Jointly prepared with Meridian Urban (2019)
- Spatial data from Council's Geographical Information System and demographic data from Australian Bureau of Statistics (2016) Census for statistical areas that generally align with the MRA
- Adapted from Trees in the Townscape: A Guide for Decision Makers, referenced in Government Architect NSW (2018c)
- 10. Taha, H (1997)
- ¹¹ NSW Office of Environment and Heritage (2016)
- Adapted from Ethos Urban and Otium Planning Group (2019)
- 13 Kinesis (2018)
- 14 Resilient Sydney (2018)
- 15 Phillips KPA (2019)
- 16 Sydney North Primary Health Network (2018)

- ^{17.} Aboriginal Heritage Office (2019)
- ³⁵ Northern Beaches Council (2018a) Australian Council for the Arts – based on Mackellar and Warringah electoral data (includes data from Mosman)
- Adapted from Department of Planning and Environment (2019)
- 20. Northern Beaches Council (2018g)
- ²¹ Transport for NSW (2019)
- ²² Adapted from Roads and Maritime Services (2019)
- ²³ Adapted from SGS Economics and Planning (2019a)
- ^{24.} Northern Beaches Council (2018f)
- 2ª Go Get (2018)
- 26 Transport for NSW (2018)
- ^{27.} Adapted from Transport for NSW (2018)
- Adapted from Roads and Maritime Services (2019)
- ^{29.} Economy .ID (2019a)
- Adapted from SGS Economics and Planning (2019a)
- ³¹ Department of Planning Industry and Environment (2018)
- 32 Economy .ID (2019b)
- 33. SGS Economics and Planning (2018)
- 34. Economy .ID (2019c)
- Adapted from Northern Beaches Council (2019d)
- ^{30.} Council of Capital City Lord Mayors (2016-17)

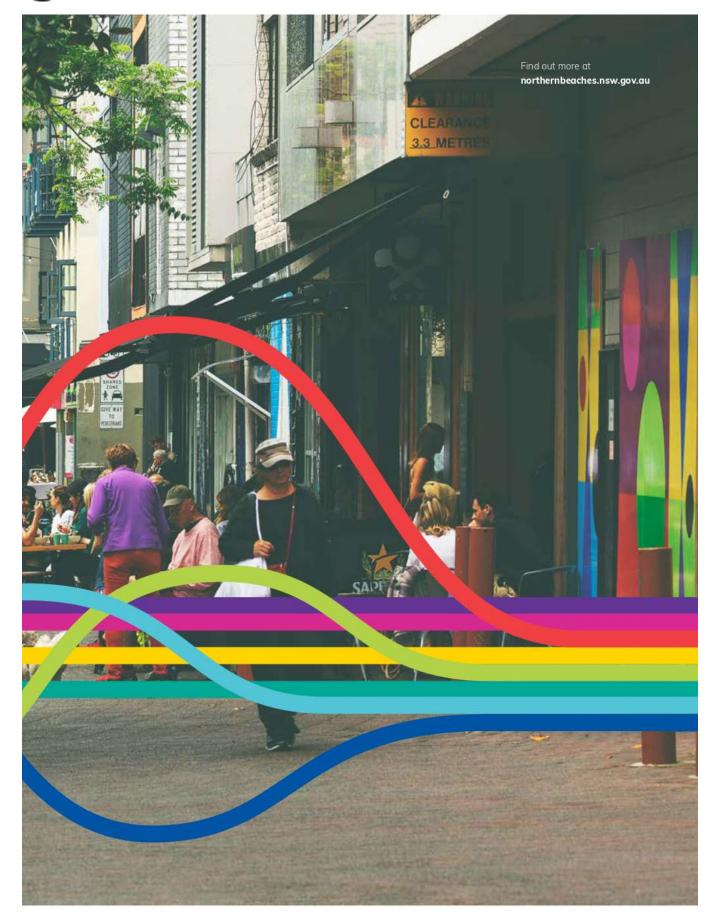
*Images within P2 credits: B. Fallowfield, E. Griffin, K. King, J. Taylor, and K. Watson



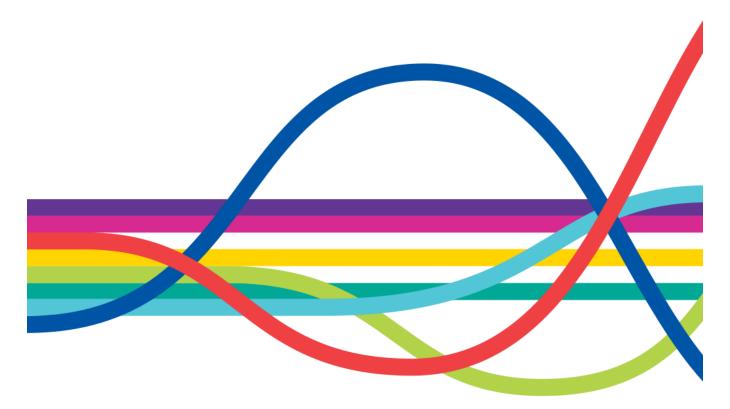




ATTACHMENT 1 Draft Northern Beaches Local Strategic Planning Statement - Towards 2040 ITEM NO. 12.1 - 24 SEPTEMBER 2019









Find out more at northernbeaches.nsw.gov.au









NORTHERN BEACHES - DEMOGRAPHIC ANALYSIS

FINAL JULY 2019 Prepared for Northern Beaches Council

Independent insight.







© SGS Economics and Planning Pty Ltd 2019

This report has been prepared for Northern Beaches Council. SGS Economics and Planning has taken all due care in the preparation of this report. However, SGS and its associated consultants are not liable to any person or entity for any damage or loss that has occurred, or may occur, in relation to that person or entity taking or not taking action in respect of any representation, statement, opinion or advice referred to herein.

SGS Economics and Planning Pty Ltd ACN 007 437 729 www.sgsep.com.au Offices in Canberra, Hobart, Melbourne, Sydney

20180549_High_Level_Planning_Analysis_FINAL_190725 (1)



TABLE OF CONTENTS

 5.2 Brookvale-Dee Why 5.3 Manly 5.4 Mona Vale 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	4 5 11 17 18 21 24 27
 4. POLICY AND PLANNING CONTEXT 5. PLACES AND CONNECTIVITY 5.1 Frenchs Forest 5.2 Brookvale-Dee Why 5.3 Manly 5.4 Mona Vale 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	11 17 18 21 24
 5. PLACES AND CONNECTIVITY 5.1 Frenchs Forest 5.2 Brookvale-Dee Why 5.3 Manly 5.4 Mona Vale 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	17 18 21 24
 5.1 Frenchs Forest 5.2 Brookvale-Dee Why 5.3 Manly 5.4 Mona Vale 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	18 21 24
 5.2 Brookvale-Dee Why 5.3 Manly 5.4 Mona Vale 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	21 24
 5.3 Manly 5.4 Mona Vale 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	24
 5.4 Mona Vale 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	
 6. PEOPLE 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	27
 6.1 Population 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	
 6.2 Migration and Resident Structure 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	30
 6.3 Age Profile 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	30
 6.4 Ancestry and Language Spoken at Home 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	34
 6.5 Education 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	39
 6.6 Indigenous Status 6.7 People with a Disability 6.8 Socio-Economic Status (IRSAD) 7. HOUSING 	42
6.7 People with a Disability6.8 Socio-Economic Status (IRSAD)7. HOUSING	44
6.8 Socio-Economic Status (IRSAD) 7. HOUSING	48
7. HOUSING	49
	51
7.1 Dwellings and Occupancy Rates	53
	53
7.2 Dwelling Type	56
7.3 Family Household Composition	60
7.4 Tenure Type	64
7.5 Motor Vehicle Ownership	66
8. JOBS AND SKILLS (RESIDENTS)	70
8.1 Labour Force Status (PUR)	70
8.2 Industry of Employment (PUR)	73
8.3 Occupation (PUR)	76
8.4 Place and Method of Travel to Work (PUR)	78
9. JOBS AND SKILLS (WORKERS)	83
9.1 Employment (POW)	83
9.2 Industry of Employment (POW)	84



Northern Beaches - Demographic Analysis

1



9.3 Occupation (POW)	87
9.4 Method of Travel to Work (POW)	89
APPENDIX 1 – ADDITIONAL PLACE AND METHOD OF TRAVEL TO WORK (PUR) – MAPS (2016)	92
APPENDIX 2 – BROAD INDUSTRY CATEGORIES (BIC) DEFINITION	96
APPENDIX 3 – UNDERSTANDING DATA AND MEASURES	97
APPENDIX 4 – GLOSSARY	100





1. INTRODUCTION

SGS Economics and Planning has undertaken a study of the demographic profile of Northern Beaches and associated growth, opportunities and challenges as part of the LSPS process

Northern Beaches Council is embarking on a preparation of a Local Strategic Planning Statement (LSPS) and review of the Local Environmental Plans (LEP), to respond to the strategic directions outlined in the Greater Sydney Region Plan and the North District Plan prepared by the Greater Sydney Commission. These documents and strategies will guide land use development in the Local Government Area (LGA), with the LSPS setting out a 20-year vision, the special character and values that are to be preserved and how change will be managed into the future.

The LSPS presents a significant opportunity for local councils to strategically plan for the future of their LGA it will facilitate the delivery of various strategies and presenting an LGA wide structure plan to ensure that centres and communities grow in the way they need to and with the infrastructure that they require.

SGS Economics and Planning (SGS) has been commissioned by Northern Beaches Council to complete a Demographic Study as part of the LSPS process. The purpose of the Demographic Study is to provide strategic context and tell the story of the local government area as it stands at present. It also reveals major trends or proposed projects that will impact on the future of the local area. This is consistent with the LSPS Guideline prepared by the Department of Planning and Environment.

The following chapters outline the content of and process that informed this report, which is aligned with the original request received form Council:

Chapter 2 – Overview Map: Map indicating the geography nomenclature used throughout this report;

Chapter 3 – Key Insights: outlines the key insights from the policy review and spatial data analysis covering a wide variety of measures and themes.

Chapter 4 – Policy and Planning Context: Review of the relevant plans, policies and documents which are shaping the growth of the Northern Beaches LGA and the North District;

Chapter 5 – Places and connectivity: This chapter profiles and compares the strategic centres within Northern Beaches across of a number of parameters and connectivity measures;

Chapter 6 – People: Analysis and insights based on demographic information for the Northern Beaches LGA and North District sourced from the Australian Bureau of Statistics and Transport for NSW's Transport Performance Analytics;

Chapter 7 – Housing: Analysis and insights based on dwelling and household information for the Northern Beaches LGA and North District sourced from the Australian Bureau of Statistics and Transport for NSW's Transport Performance Analytics;

Chapter 8 – Jobs and Skills (Resident): Analysis and insights based on employment (residents) information for the Northern Beaches LGA and North District sourced from the Australian Bureau of Statistics and Transport for NSW's Transport Performance Analytics;

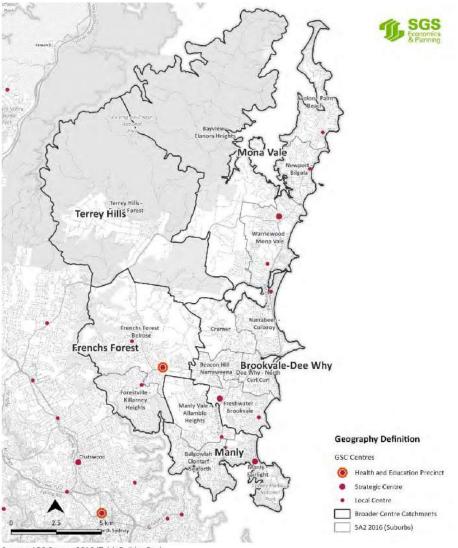
Chapter 9 – Jobs and Skills (Workers): Analysis and insights based on employment (workers) information for the Northern Beaches LGA and North District sourced from the Australian Bureau of Statistics and Transport for NSW's Transport Performance Analytics;





2. OVERVIEW MAP

FIGURE 1: GEOGRAPHY DEFINITION - MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

The Broader Centre Catchments (Manly, Frenchs Forest, Brookvale-Dee Why, Terrey Hills and Mona Vale) represent aggregations of ABS - Statistical Areas Level 2 (SA2) (2016) and are used for reporting data in tabular format throughout the report.

The SA2s have been used for most of the mapping (diagrams) throughout the report and are referred to as "suburbs".





3. KEY INSIGHTS

This chapter outlines the key insights derived from the policy review and spatial data analysis covering a wide variety of measures and themes

Note: Image references at the end of the section

A mix of vibrant centres

Northern Beaches has a mix of growing centres experiencing large-scale transformation on one side (Brookvale-Dee Why and Frenchs Forest) and more established, settled centres on the other (Mona Vale and Manly). Overall, there are five strategic centres identified in the Greater Sydney Commission's (GCS) policy framework - *Brookvale-Dee Why¹*, *Manly*, *Mona Vale* and *Frenchs Forest* which is also a health and education precinct. In addition, there are nine local centres identified as well:

	 Avalon Balgowlai Forestvill 	h 🗾 B	reshwater Ielrose Aanly Vale	NarrabeenNewportWarriewood
CENTRE	5			
	METROPOLITAN	STRATEGIC	LOCAL	HEALTH AND EDUCATION PRECINCT (SEE OBJECTIVE 21)
		•		۲
ROLE	Metropolitan centres are the economic focus of Greater Sydney, fundamental to growing its global competitiveness and where	Strategic centres vary in size, location and mix of activities. They enable access to a wide range of goods, services and jobs.	Local centres are important for day-to-day access to goods and services	Health and education precincts can form parts of centres and include major hospitals, universities and medical research institutions, and
	government actions and investment, including transport, will be focussed. The intent of these centres is to deliver very high levels of development and amenity. Metropolitan contres occur in two forms: single centres or a cluster of centres.	Strategic centres are expected to accommodate high lavels of private sector investment, enabling them to grow and evolve. They will become increasingly important parts of the region's structure.		connect the community to health and education services. They act as drivers of export services and provide major employment opportunities. They generally contain a principal referral hospital and tertiary education campus.

The policy envisions the strategic centres as evolving hubs of high-level private sector investment and growth. Their role and function within the district structure will become increasingly important enabling a wide range of goods, services and jobs.

The local centres are a key part in the broader network of centres, supporting the day to day needs of the local population by providing access to goods and services such as local retail, at a walkable and convenient distance.

Beyond the distinction between centre types (growing and established) there is also a difference between the centres with higher (Brookvale-Dee Why and Manly) and lower (Frenchs Forest and Mona Vale) population densities. These differences are evident across a number of indicators. The surrounding population catchments of higher density centres have a more varied housing stock, are more multicultural, have a younger population and smaller car ownership rates than lower density centres. Access to transport drives a variety of housing stock, reduces the need for private vehicle ownership and the restaurants and activities attract a diverse population.

¹ Brookvale-Dee Why are identified in the North District Plan as a combined strategic centre and for the purpose of the report, they are referred to as a combined centre





Brookvale-Dee Why

northern beaches

council

Of the strategic centres, the Brookvale-Dee Why centre surrounding catchment has:

- Good connectivity to the other centres and a large workforce base (only centre accessible from all other Northern Beaches centres within 30min by using public transport)
- Almost 50% of the population growth (+7,090 people) has occurred in this area between 2011 and 2016 and approximately a quarter of the dwelling growth (+1,569 dwellings) - population density of 4,287 people per km² compared to Northern Beaches average of 2,675 people per km²
- It also represents the largest employment hub on the Northern Beaches, accommodating approximately one third of the LGA's jobs (27,492)

Brookvale-Dee Why has the youngest and most culturally diverse population, along with Manly. It also has higher rates of Overseas migration to the area. The area has experienced continued transformation in the past 5-10 years and is a thriving cultural and employment centre. Its housing mix is diverse and more affordable, with nearly half of the dwellings in the Flat, Units or Apartment housing typology. The population density is well above the LGA average - 4,287 people per km² and the area is home to about 90,000 people.

About 50% of residents work locally, with other popular work destinations being the City and North Sydney/Chatswood. The most preferred transport option for local workers (within Northern Beaches) are cars. However, people commuting to the City (and to some degree North Sydney) prefer using Public Transport options.

Brookvale-Dee Why has a high proportion of Population Serving jobs (see Appendix 2 – Broad Industry Categories (BIC) Definition for detailed industry breakdown). This is driven in a large part by Warringah Mall but also its good position and connectivity - making it easier for people to access regional level services. It represents a popular work destination for people from other centre catchments within the LGA as well.







Frenchs Forest

Frenchs Forest 's surrounding catchment has:

- Broad 30-minute public transport coverage and connectivity with neighbouring LGA centres (Chatswood)
- Smaller population densities compared to Brookvale-Dee Why and Manly centre catchments
- About 10% of the Northern Beaches' population growth (+1,611 people) has occurred in this area between 2011 and 2016 and approximately 5% of the dwelling growth (+317 dwellings)
- Important employment centre with approximately 15,000 jobs, but most of the workforce is located in the secondary catchment of the centre²
- Very high use of private vehicles (cars) for commuting to work (both residents and workers)

Frenchs Forest is a family orientated area, with the highest proportion of Couples with Children and greatest home ownership rates on the Northern Beaches. Detached dwellings account for the vast majority (90%) of housing types. The area also has a high number of cars per household compared to most of the other centres.

About a quarter of the residents work locally, and most of the remaining in the City and North Sydney/Chatswood. The most preferred transport option for local workers are cars, while people commuting to the City have a higher use of public transport. The future development of Frenchs Forest as a health and education precinct may create future challenges related to increasing congestion and parking demand. See section 5.1 Frenchs Forest for a more detailed description.

The employment mix is relatively diverse although most jobs relate to the nearby business parks. The centre also has a higher proportion of Industrial jobs compared to the other centres. Workers in the centre come from both within and outside of the LGA, reflecting the strategic nature of the centre.



² Secondary catchments are those areas that can access strategic centres (i.e, Frenchs Forest) within 30min by using public transport, but less frequently than areas in the primary catchment





Manly

Manly centre surrounding catchment has:

- Relatively contained catchment and poor connectivity to other areas within the LGA, but good direct public transport connection to CBD via ferry
- High population density and workforce to population ratio
- About 20% of the Northern Beaches' population growth (+3,122 people) has occurred in this area between 2011 and 2016 and approximately 10% of the dwelling growth (+610 dwellings)
- Highest job growth of all the Northern Beaches' centres 20% between 2011 and 2016 (+2,489 jobs)
- Very multicultural area, with high number of knowledge intensive workers
- Highest use of public and active transport³ options amongst the centres

With Brookvale-Dee Why, Manly has the youngest and most culturally diverse population of the Northern Beaches' centres. It also has a higher number of Overseas migrants in the area. While growth over the past five years has been low, Manly has the largest population density of all the centres - 4,544 people per km² - reflecting its established compact structure and diverse housing options.

The two hotspots of employment for local residents are within Manly's surrounding and the Sydney CBD. This reflects some of the lifestyle choices residents make in living in and around Manly. Local workers have a high utilisation rate of active transport options while close to 75% of the CBD commuters use public transport (the highest rate on the Northern Beaches). Around half of the residents are employed within the Knowledge Intensive sector (primarily as Professionals and Managers) confirming the area's appeal to young professionals and acknowledging the relatively high housing and rent costs of the area.

Manly has the highest proportion of Health and Education⁴ and Knowledge Intensive jobs (as proportion of all jobs in Manly), compared to the other centres, which could be a result of its skilled workforce but also its geographic position, large number of educational facilities and providers but also historical factors (i.e. earlier settlement with stronger sense of place). Most jobs are filled by local residents, but also people coming from the Brookvale-Dee Why area.



³ Active transport options include cycling and walking

⁴ The catchment contains the Manly Hospital that has closed post-census (after 2016) and might change this profile. However, theremay be opportunities related to the Manly Hospital site and in North Head.





Mona Vale

Mona Vale centre surrounding catchment has:

- Mid-range 30min public transport area coverage
- Around 20% of the population growth (+3,272 people) has occurred in this area between 2011 and 2016 and approximately 15% of the dwelling growth (+1,192 dwellings)
- Lower densities 2,032 people per km²
- Most diverse employment centre on the Northern Beaches with about 18,500 jobs
 Very high uses of private vehicles (cars) for commuting to work (both residents and workers)

Mona Vale, as with Frenchs Forest, is a family-orientated area with a large proportion of Couples with Children and high home/car ownership rates. It has a relatively diverse housing typology, although still dominated by detached dwellings (70%) - some suburbs experiencing an increase in this category (Avalon-Palm Beach and Newport-Bilgola). Most of the semidetached housing has recently occurred in Warriewood-Mona Vale, with a historical pattern of Flat, Units or Apartment occurring between the centre and the beach and detached dwellings concentrating in the West section of the area.

More than 50% of residents work locally within Mona Vale (very high self-containment rate) with about 3,000 workers (10%) commuting to the City. The use of private vehicles (cars) for commuting to work is the highest amongst the centres, but so is the number of people that Worked from Home. This reflects the relative distance from major centres of employment, particularly those outside of the LGA.

Mona Vale's employment mix is amongst the most diverse out of all of the centres, ranging from industrial to population serving uses, which testifies to the self-sufficiency of the area. The largest number of the jobs is filled by local residents and the remainder with workers from other parts of the LGA.







Major infrastructure delivery for a more connected place

The Greater Sydney Regional Plan (GSRP) identifies the Beaches Link and Western Harbour Tunnel as committed motorways to improve accessibility to the Harbour CBD, Chatswood and Macquarie Park from the Northern Beaches. They provide improved North-South connections from Frenchs Forest and East-West connections from Manly. The Plan also identifies a potential Northern Beaches to Chatswood bus improvement to better connect the Northern Beaches Hospital and the Northern Beaches with the corridor.



Recent media announcements from Transport and Infrastructure Minister and Council have confirmed the intention to have frequent, reliable bus services running from Dee Why to Chatswood every 10min between 6am and 10am allowing Northern Beaches commuters to link up with Sydney Metro Services at Chatswood.

Improved bus services between the Northern Beaches and Chatswood, as well as an eastwest public transport connection from Mona Vale to Macquarie Park are initiatives identified for investigation over the next 10 years.



Frenchs Forest is intended to be one of the largest growth areas in the Northern Beaches LGA, with the Northern Beaches Hospital development intended to anchor the presence of a Health and Education precinct as well as improved transport links, creating opportunities to invest in a major new centre and remove the disparate nature of the current Frenchs Forest employment centres.







Family orientated, but ageing population

The Northern Beaches is attractive to and populated by families, in particular Couples with Children - also reflected in the high numbers of Mature Adults (45-65 years) and Youth (5-20 years). The Beaches' natural amenity, safety and high social scores (i.e. SEIFA) act as attractors to these profiles. However, the population is ageing and at higher rates than Greater Sydney and North District averages. This is especially noticeable in the decline of Adults (30-45 years) and Young Adults (20-30 years) on the Northern Beaches, with most Young Adults migrating to more vibrant locations closer to Sydney CBD – Sydney, Inner West and North Sydney, most likely due to lifestyle, amenity, proximity to work and nightlife.



The influx of younger people and couples to the area, in particular Adults, is primarily coming from sources outside of the LGA -Overseas and Internal migration (other parts of Sydney or Australia). This means that, assuming trends continue, Northern Beaches growth trends will be driven by an inflow of people from outside of the LGA. Most of the Local residents (resided on the Northern Beaches for five years or more) are in the Mature Adult and Retiree¹¹ (65+

years) groups. In general, the Overseas migration rates are lower when compared to the District and Greater Sydney with most migrants finding home in the Manly or Brookvale-Dee Why centres.

Diverse, but less multicultural than Greater Sydney

Northern Beaches has a noticeable proportion of people of European ancestry (constituting about 65% of the community). These are principally people of British ancestry - close to half of the total population. Other relevant ancestry groups are Irish, Southern European and Western European. The most multicultural suburbs are Dee Why-North Curl Curl, Beacon Hill-Narraweena and Forestville-Killarney Heights. People of Australian decent constitute about 20% of the population.

English is the main language spoken at home, spoken by 85% of the population. This reflects the high proportion of residents with British ancestry. This is a lot higher than the District and Greater Sydney averages. However, Northern Beaches has a much lower proportion of Chinese Asian, Southern Asian and Southern European ancestries, as well as fewer people speaking Chinese, Indo-Aryan and Middle Eastern at home when compared to Greater Sydney and District averages. This indicates that while the population may have a diverse age profile, it has relatively low levels of multiculturalism.





A socially advantaged area

northern beaches

council

Northern Beaches is amongst the most socially advantaged areas in Sydney and more broadly Australia. The high SEIFA (Socio-Economic Indexes for Areas) scores are indicative not only of the high standard of living and skilled population, but also the larger number of opportunities available to the local residents. Small pockets of disadvantaged communities are located in Narraweena and Dee Why while the highest scoring suburbs are Balgowlah-Clontarf-Seaforth and Frenchs Forest-Belrose

Larger proportion of home ownership, with declining housing affordability

Home ownership rates are higher when compared to the District and particularly Greater Sydney, which is most likely correlated to generally larger household incomes and being considered a place to raise a family. However, the number of Outright owned estates is declining, with an increase of properties Owned with a Mortgage or Rent based tenures. indicative of decreasing housing affordability as well as perhaps newer residents purchasing in the area with a mortgage. At a suburb level, home ownership rates are higher in Frenchs Forest and Mona Vale while the Brookvale-Dee Why and Manly centre catchments have an equal number of households renting and owning a home.

Increasing numbers of cars

Car ownership rates are relatively high, with Northern Beaches having a larger proportion of households with Two Motor Vehicles, and a lower proportion of those with No or One Motor Vehicle - compared to the District and Greater Sydney. This is understandable, considering

the relative lack of mass transit and geographic isolation of parts of the LGA. The car ownership rates are especially increasing in the number of households with Three and Four and more Vehicles.

Per household rates have grown between 2011 and 2016 - by 4% with the average number of Motor Vehicles per household at about 1.7 cars. See 7.5 Motor Vehicle Ownership or more details.



A transition from tradies to office workers

Northern Beaches has a mix of occupations and education profiles, ascertaining the area's attractiveness to a variety of people and professions - as a place to live and work. Compared to the District and Greater Sydney, the area has a higher proportion of people with VET¹² qualifications and workers employed in the Population Serving industries.

However, most of the population is employed within the Knowledge Intensive sector (one third of residents are Professionals) - particularly high numbers in the Manly centre catchment, suburbs of Manly-Fairlight and Balgowlah-Clontarf-Seaforth and Manly Vale-Allambie Heights to a lower extent. Other areas with higher proportions of Knowledge Intensive workers are also Forestville-Killarney Heights and Frenchs Forest-Belrose.







Self-sufficient economy with the majority of people employed locally

Northern Beaches offers its residents a number of employment opportunities, having both the highest proportion of local jobs filled by local residents (self-sufficiency) and residents working locally (self-containment) in Greater Sydney - a testament to its strong economy and willingness of people to work locally (over 80%). This has a positive impact on reducing the potential for commuter-related private vehicle and public transport trips out of the LGA.

The majority of jobs on the Beaches are population serving

Northern Beaches is primarily a Population Serving economy (high job numbers particularly in Retail Trade), with strong growth trends in the Health and Education sector as well. The Industrial category is experiencing a decline in job numbers following city and nationwide trends.



Cars are still the preferred method of travel to work

Most commuters traveling within, to the Northern Beaches or other areas outside of the LGA use Private Vehicles (cars) for their commute to work - approximately 70%. With an increasing population and car ownership rates, this might pose a threat by further increasing congestion and travel times. Residents within the broader catchments of Manly and Brookvale-Dee Why have higher utilisation rates of Public and Active Transport options, while North sections of the LGA (Mona Vale catchment) have a prominent share of people Working from Home.



if, SGS

northern

beaches council



More people working from home, with increasing distance

Trends are showing that there has been a slight increase in the proportion of people working from home on the Northern Beaches, historically and compared to Greater Sydney, but also that there are relatively more people working from home in areas further away from Sydney CBD in the Northern Beaches (i.e. Mona Vale). Flexible workplace arrangements are an essential part of today's labour market and have a profound impact on the broader economy. There are numerous reasons why businesses and employee seek this type of arrangement, amongst other, in order to retain valuable staff, attract skilled members who add value, promote a culture of work life balance resulting in greater employee satisfaction and other.

From a locational point of view, this creates opportunities for local centre through increased retail trade or even by supporting innovative working arrangements (i.e. shared office space for local workers). New micro businesses might also seek to relocate to nearby centres as a result of continued growth, utilising local office space.



Brookvale - Dee Why at the crossroad of activity

Dee Why has good connectivity to other parts of the LGA, a large workforce base and is the only centre accessible from all other Northern Beaches centres, within 30min by using public transport. About 50% of the population growth has occurred in the *Brookvale-Dee Why* broader catchment area, and a third of jobs is located here - representing the largest employment hub on the Northern Beaches. Due to its positioning and accessibility, as well as its already established employment base, this centre can help further drive employment growth and serve as the primary location for regional services.

Image reference in order of appearance:

- 1. Centres Hierarchy Greater Sydney Regional Plan A Metropolis of Three Cities 2018
- 2. New Dee Why Centre https://www.commercialview.com.au 2019
- Development of Northern Beaches Hospital in Frenchs Forest Department of Planning and Environment NSW Government 2018
- 4. Manly Corso ManlyAustralia.com 2014
- 5. Commercial offices in Mona Vale Real Commercial 2019
- 6. B-Line at Dee Why Daily Telegraph 2019
- 7. Beaches Link Tunnel Plan NSW Government 2017
- 8. Family based area with ageing population Shutterstock images 2019
- 9. Young adults and youth at beach Migration SA 2019
- 10. Increasing car ownership rates Shutterstock images 2019
- 11. Knowledge intensive worker in office Shutterstock images 2019
- 12. Industrial worker Shutterstock images 2019
- 13. Large number of retail jobs ABC 2016
- 14. Congestion on Spit Bridge Daily Telegraph 2019
- 15. Home office https://www.beaming.co.uk/ 2018



4. POLICY AND PLANNING CONTEXT

This section of the report reviews a set of strategically important planning documents from different levels of government and agencies

Greater Sydney Region Plan

The Greater Sydney Commission's Greater Sydney Region Plan (GSRP) is a metropolitan strategy that seeks to align the provision of infrastructure investment and services with growth trends. It envisions Sydney as a Metropolis of Three Cities: the Western Parkland, Central River and Eastern Harbour City. Under this vision, Sydney would be a 30-minute city, with everyone able to access jobs, services and major centres.

The Plan seeks to deliver this vision through ten directions with associated objectives, priorities and actions to make Sydney more liveable, productive and sustainable. Given that the Northern Beaches sits within the Eastern Harbour City, its drivers of growth and change are relevant to the LGA's future planning strategies. The Plan identifies the Eastern Harbour City as a 'mature mix of well-established communities' with a number of infrastructure and transport investments projected to improve the liveability of the area.

725,000 additional homes are needed to meet the growing needs of Greater Sydney over the next 20 years, with the Northern District (City of Ryde, Hornsby, Hunters Hill, Ku-ring-gai, Lane Cove, Mosman, North Sydney, Northern Beaches and Willoughby Local Government Areas) required to provide 25,950 homes by 2021 and 92,000 by 2036. The vision broadly identifies future transport corridors and areas of investment within the LGA to appropriately support locations of new housing and facilitate greater job connectivity.

The GSRP identifies the Beaches Link and Western Harbour Tunnel as committed motorways to improve accessibility to the Harbour CBD, Chatswood and Macquarie Park. They provide improved north-south connections from Frenchs Forest and east-west connections from Manly. However the Plan notes that the corridors are indicative only and subject to a final business case. Since then, the corridors have been reviewed by the NSW Government and Roads and Maritime Services⁵ with the release of a detailed design in July last year remaining consistent with the GSRP's illustration of the corridors. The population will be able to benefit from the committed projects as through improved accessibility to employment, services, and retail hubs.

The Plan also identifies a potential Northern Beaches to Chatswood bus improvement to better connect the Northern Beaches Hospital and the Northern Beaches with the corridor.

Manly, Brookvale-Dee Why, Frenchs Forest and Mona Vale are the identified strategic centres of the Northern Beaches LGA. Furthermore, Frenchs Forest has also been identified as a Health and Education Precinct and Planned Precinct. In October 2018, a \$600m hospital opened in Frenchs Forest⁶, anchoring the region's projected growth as a Health and Education Precinct. As a proposed Collaboration Area, the GSRP has also identified several

⁶ Cross, J 2017, 'Northern Beaches Hospital ahead of schedule and due to open October 30, 2018', The Daily Telegraph, 25 August, accessed 31 January 2019, <<u>https://www.dailytelegraph.com.au/newslocal/manly-daily/northem-beaches-</u> hospital-ahead-of-schedule-and-due-to-open-october-30-2018/news-story/d91e6c5f38cb0070e662d13c08067afd>



northern

beaches council

⁵ RMS 2018, Western Harbour Tunnel and Beaches Link take major steps forward, NSW Government, accessed 31 January 2019, <https://www.nsw.gov.au/your-government/the-premier/media-releases-from-the-premier/western-harbourtunnel-and-beaches-link-take-major-steps-forward/>



agencies that should work together with the Northern Beaches Council in order to grow more jobs, housing and infrastructure in the precinct. The increased economic development may impact the area's desirability and demographics of its local population.

The GSRP identifies the Northern Beaches B-Line as an existing infrastructure investment project. The B-Line is a bus rapid transit network that has been operational since November 2017 and runs between Mona Vale and Wynyard Park. Since its opening the B-Line has been successful, carrying 5.9 million passengers in its first year⁷. The recently improved connections, as well as proposed transport corridors, may further increase the area's desirability and impact the demographics of its local population into the future. Other strategic directions within the GSRP which may have implications for the demographics of the Northern Beaches include:

- Providing an increased supply of housing that is diverse and affordable, which would meet the needs of the Council's different households. Council is progressing towards meeting this goal having undertaken an Affordable Housing Needs Analysis to support its successful inclusion in SEPP70.
- Celebrating and retaining diversity of people in our cities, and providing services to meet their changing needs, for which Council will need an understanding of the likely demographic mix in the Council in future.
- Strategic centres seeking co-location of a wide mix of land uses including residential.

North District Plan

The North District Plan (NDP) implements the GSRP's strategic directions with more detailed directions and planning priorities to be implemented in local planning for the Northern District.

The Plan identifies strategic priorities for the Northern Beaches LGA at a local scale including Avalon, Newport, Warriewood, Narrabeen, Freshwater, Manly Vale, Balgowlah, Belrose and Forestville as local centres. Local centres, as a collection of shop and health, civic or commercial services, play a key role in creating a sense of place within the local community. Strengthening these areas may increase the area's desirability and impact its demographic mix into the future.

The Plan sets a strategic 20 year housing target of 92,000 additional dwellings for the Northern District between 2016-2036. To accommodate population growth, a housing supply target of **3,400 additional dwellings** between 2016-2021 has been set for the Northern Beaches, 13% of the Northern District's total. If the proportion is replicated over a longer time-frame, a population increase in the Northern Beaches would be expected.

As the Northern Beaches contains significant environmental conservation areas towards the north and west of the LGA, the majority of urban development has historically occurred closer to the lagoons and beaches in the east, with little undeveloped land left. This means that most of the growth will need to occur through infill development and renewal of centres, which may impact the lifestyle enjoyed by existing residents.

In considering the type and distribution of housing supply, the NDP has identified several demographic trends that may affect Council's approach including:

- 20% of the District's population to be aged 65 and over in 2036, up from 16% in 2016.
- Number of single-person (mostly single parent) and couple only houses are expected to increase by 2036.
- Households of couples with children will still remain the highest proportion of households.

⁷ RMS 2018a, B-Line success – 5.9 million passenger trips in first year, NSW Government, accessed 31 January 2019, <<u>https://www.transport.nsw.gov.au/news-and-events/media-releases/b-line-success-59-million-passenger-trips-first-year></u>.





- An extra 21,900 students will need to be accommodated in both government and nongovernment schools in the North District by 2036, a 20% increase. While most of this growth will occur in Ryde (8,160), a significant proportion of it will also occur in the Northern Beaches (3,454).
- Northern Beaches residents speak 99 languages other than English including Spanish and Italian

Furthermore, strategic centres are also projected for significant growth, potentially increasing the attractiveness of the Northern Beaches as a place to live and work.

Frenchs Forest is intended to be one of the largest growth areas in the Northern Beaches LGA, with the Northern Beaches Hospital development intended to anchor the presence of a Health and Education, sustainable precinct as well as improved transport links. This vision will be further realised with the creation of a vibrant centre with new homes and jobs. 12,000-13,000 jobs are projected for 2036, up from its 2016 estimate of 9,300 jobs. This growth may shift the demographics of the Northern Beaches towards a greater proportion of high wage local employment and health professionals working and/or residing in the LGA into the future.

Brookvale-Dee Why is an industrial and mixed-use area supporting niche manufacturing wholesale industries in the day, as well as a vibrant local night-time economy. It contains Warringah Mall, one of the largest retail areas in Greater Sydney, as well as a TAFE NSW campus. Its 2016 estimate of 20,000 jobs is projected to grow to 23,000-26,000 by 2036. This growth could potentially encourage a wider mix of people living and working in the LGA.

Manly has been identified as an area bringing a variety of cultural, tourist, and entertainment activities in close proximity to Manly Beach, one of the most popular beaches in Sydney. It is well served by public transport and includes a ferry and bus service from the Sydney CBD. Its 2016 estimate of 5,000 jobs is projected to grow to 6,000-6,500 by 2036. This growth could potentially encourage a greater presence of visitors and tourists in the LGA, and increase the desirability of living there with more local jobs available.

Mona Vale is a mixed use area containing retail, commercial, community, light industrial and residential services. Given its improved transport connection via the B-Line, and further improvements to travel time intended, its 2016 estimate of 4,300 jobs is projected to grow to 5,000-6,000 jobs by 2036. This growth could encourage a greater proportion of people living in the LGA or surrounding LGAs to work in Mona Vale as the centre becomes more accessible. The increased economic development at each of these strategic centres may impact the LGA's overall desirability and demographics of its population.

The implementation of the Coast Walk will see improved connectivity along the coast, including Council's four coastal lagoons and improved links to parks, open spaces, bushland, walking and cycling paths.

Future Transport 2056

Future Transport 2056 is Transport for NSW's overarching strategy to deliver transport infrastructure investment over the next 40 years. The vision is built on the following six outcomes:

- Customer Focused
- Successful Places
- A Strong Economy
- Safety and Performance
- Accessible Services
- Sustainability

In terms of the Northern Beaches, the Western Harbour Tunnel and Beaches Link are committed transport projects due to be delivered over the forthcoming years, furthering the improved accessibility of the area facilitated by the Northern Beaches B-Line.





Improved bus services between the Northern Beaches and Chatswood, as well as an eastwest public transport connection from Mona Vale to Macquarie Park are initiatives identified for investigation over the next 10 years.

The Strategy also identifies city shaping corridors from the Harbour CBD to Brookvale-Dee Why and Mona Vale by 2056. A strategic road connecting the Northern Beaches to Macquarie Park and Newcastle via the Northern Beaches is a visionary initiative potentially undergoing investigation over the next 20+ years.

Completion of the major transport infrastructure projects discussed in *Future Transport 2056* but not yet committed to by the NSW Government or in planning would likely be accompanied by intensive redevelopment. This would change the demographic characteristics of the areas around these projects, with consequences for the level and type of services that the Council needs to provide.

Northern Beaches Planning for Our Sustainable Future January 2019

The Northern Beaches Planning for Our Sustainable Future was a booklet released by Council intending to help the community understand the changes underpinning planning decisions for the LGA.

Within the booklet, Council identified a number of trends which directly relate to and help to inform what the future demographics of the LGA may look like. Some of these include the following:

- The Northern Beaches needing to house and service around 35,000 more people over the next 20 years.
- 3,400 new homes by 2021.
- 7,400 to 12,000 more jobs by 2036 mostly in Brookvale-Dee Why and Frenchs Forest
- Separate houses making up 56% of the household type in the LGA, significantly above high density (26%) and medium density living (17%).
- Couples with children making up 37% of the household composition in the LGA, significantly above couples without children (25%), lone person (21%), and one parent families (3%).
- An **ageing population**, having seen a 3.3% increase in persons aged 70-74 from 2011 to 2016 compared to the Greater Sydney average of 2.8%.
- Smaller proportion of young adults compared to Greater Sydney, with 27.3% aged between 20-37 compared to the Greater Sydney average of 30.5%.
- 45.5% of total households are families.
- Housing is unaffordable for owners and renters as housing costs make up 53% and 65% of moderate income households respectively.
- Land for jobs being in short supply.
- Council seeking to have more people living and working locally.

These trends will help to inform future planning strategies for the Northern Beaches as it identifies groups within its demographics which will need attention over the forthcoming years, as well as centres which may require further planning.

The Geography of Time-Mapping Sydney's Effective Job and Service Density

The Committee for Sydney published a paper in 2017 which seeks to map the relative accessibility of jobs and services to a person within 30 minutes, given state metropolitan strategies are striving towards Sydney as a collection of 30-minute cities.

In short, the paper investigates how many jobs a worker can access from their home by public transport or private vehicle in 30 minutes.

The paper found that the Northern Beaches has relatively average effective job density, with the number of jobs accessible within 30 minutes in Sydney on a weekday morning ranging





from 0-400,000, in comparison to Drummoyne which has the highest number of jobs accessible at 786,929.

The Northern Beaches has slightly 'below average' results, related to the access of hospitals, schools and shopping centres within a 30 minute cut off time.

With major transport infrastructure investments in the pipeline for the LGA, as well as the strengthening of strategic centres as retail and employment hubs, the effective job and service density of the Northern Beaches could improve. This would impact the area's desirability as a place to live and work, potentially changing the demographic characteristics of the LGA.

Northern Beaches Council LEP Review- November 2018

This LEP Review was undertaken by Council in response to the release of the *Greater Sydney Region* and *North District Plan* by the Greater Sydney Commission in March 2018, identifying priorities for investigation in the development of Council's new LEP.

Its discussion of key areas of change and growth into the future within the LEP Review incorporate references to a number of explicit and implicit demographic trends which may impact the mix of the area. Some of these include the following:

- A focus on a well-functioning transport network, integrated access to local jobs and affordable homes for key workers- identified as vital considerations for the Northern Beaches' future liveability.
- Major challenges for the Northern Beaches being an ageing population and housing affordability.
- The working age population, while increasingly made up of highly skilled professionals and managers, is projected to decline.
- Young adults are leaving for more affordable coastal locations, to access education
 opportunities and live closer to job opportunities aligned to their skills and aspirations.
- Community Strategic Plan SHAPE 2028- A plan that, amongst other objectives, intends to create a more connected and caring community and advocates the embracement of its diverse sports and recreational culture. This may impact the type and level of demographic services Council will need to provide in the future.
- There is a presence of Indigenous culture within the LGA, with 0.6% of the Northern Beaches population identified as Aboriginal and/or Torres Strait Islander descent.
- Some communities are considered disadvantaged. The Northern Beaches is characterised by relative socio-economic advantage, however, relative advantage is considerably diverse across the LGA.
- High car use rates for Northern Beaches residents, with 60% travelling to work via car and 80% of household trips (social, recreation, education and shopping trips).

Northern Beaches Council LEP Review – Appendix 2 – 'Health Check'

This section compiled by Council seeks to identify how closely aligned Council's existing local environmental plans are to the relevant actions provided in the North District Plan.

Its references to existing council plans, strategies and research that contribute to those actions provides insight into the factors shaping how the LGA will grow, and posing questions about how that may change the demographics of the area.

Predominantly, a number of transport infrastructure priorities were identified by Council. Each of these would increase the liveability of the LGA as accessibility to jobs and services would improve synonymously, potentially changing the demographic mix of the LGA.

These transport projects include a Bus Rapid Transit Service between Brookvale-Dee Why, Frenchs Forest and Chatswood, followed by services between Mona Vale and Macquarie Park. A high frequency mass transit service for the Northern Beaches as part of its draft transport





strategy MOVE 2038 as well as a turn up and go public transport service east-west of the LGA were also identified.

Furthermore, Council seeks a Green Star Communities rating for the Frenchs Forest Planned Precinct and Ingleside Growth Area. This would involve making the area healthier, safer and more inclusive for people of all ages and abilities. A potential *Social Plan* done separately for the whole LGA, would attract a diverse demographic mix to the area, with consequences for the level and type of services that the Council may need to provide.

Council also envisions the Northern Beaches as an 'Ideas Incubator' and be the go-to place for IOT (Internet of Things), start-ups and researchers. While this would foster the growth of innovative projects, ideas and initiatives in the area, it would also introduce a greater number of people living entrepreneurial lifestyles in the Northern Beaches which may need to be planned for accordingly.

Local Housing Strategy Guideline

The Local Housing Strategy Guideline was put together by the Department of Planning and Environment (DP&E) in order to provide a step-by-step process for producing a local housing strategy.

It encourages the alignment of housing growth directions with an appropriate type and level of service for its demographics. Some of these demographic services include schools, social services and health facilities.

Council will need an understanding of its demographic mix in the future in order to cater for its population and consequently meet the guidelines of the local housing strategy.





5. PLACES AND CONNECTIVITY

This chapter profiles and compares the strategic centres within Northern Beaches across of a number of parameters and connectivity measures

Disclaimer: When comparing growth rates between multiple time periods, Compound Annual Growth Rate (%) has been used. The Compound Annual Growth Rate (CAGR %) is a useful measure of growth over multiple time periods. It can be thought of as the growth rate that gets you from the initial value to the ending value.

As Census data (2006-2016) has exclusively been used for reporting historical data/trends in this study, this can be imagined as a Compounded *Census* Growth Rate, representing growth rates at five year (5-yr%) increments. The same can be applied for future projections (TPA data), representing a forecasted growth rate each five years (5-yr%).

For more information, please reference: https://www.investopedia.com/terms/c/cagr.asp

Percentage Point (PP%) – represents the difference between two percentages. Percentage point is used to show the changes in an indicator with respect to its previous standings (e.g. between growth rates in 2016 and 2011);

Due to differences in methodology and the way data is captured, direct comparisons between absolute ABS historical data values (2006-2016) and TPA (Transport Performance and Analytics) forecasts (2021-2036) is strongly discouraged. It is recommended to use general trends and proportions when observing future trends and comparing across. There is also limited comparison for some indicators over Census periods due to changes in how ABS captures data;

Place of Usual (PUR) - some undercounting inevitably occurs for various reasons during Census count. Although adjustments are available for certain indicators in the form of Estimated Resident Population (ERP) these haven't been used in this report, in order to achieve consistency across all indicators;

Place of Work (POW) - ABS has introduced a new imputation method in 2016 for assigning workplace destination (Destination Zones) to persons that provided partial or no information about their place of work. The imputed data was excluded from this report, in order to achieve compatibility across previous Census years and 2016. As different imputations are applied to different geographies as well, LGA totals will not match sums of lower level geographies (e.g. SA2);

Broad Industry Category (BIC) - represents Greater Sydney Commission (GSC) broad categorisation of 1 digit ANZSIC industries;

Some discrepancies might be present in the Suburb level data, due to changes in ABS geographies between 2011 and 2016;

Totals derived from summing up suburb level data are slightly different to LGA totals due to ABS perturbations applied to protect the confidentiality of individuals;

Note:

- Greater Sydney will be referred to as GS
- North District will be referred to as District

IMPORTANT: Read disclaimer prior to commencing analysis





5.1 Frenchs Forest

Frenchs Forest has a broad 30min public transport coverage but small densities in its Primary Catchment compared to other centres. This is a result of relatively good connectivity but a predominately homogeneous detached housing typology. However, the Secondary Catchment encompasses not only major strategic centres within Northern Beaches (e.g. Brookvale-Dee Why) but also neighbouring councils (e.g. Chatswood within Willoughby Council) making Frenchs Forest the most inter-LGA connected centre within Council.

Overall, the *Workforce to Population Ratio* is somewhat smaller compared to the other catchments, most likely due to a larger proportion of people outside the labour force. The total *Workforce* numbers, within the *Primary Catchment*, is also modest compared to the other centres, which might pose a challenge for the future development of *Frenchs Forest* as a health and education precinct. The challenges could be related to a lack of workers in the direct vicinity of the centre, possibly generating demand in the *Secondary Catchment* and creating longer travel times for workers.

Centre Catchment ^s	Population	Workforce	Area (km²)	Workforce to Population Ratio	Population Density (per km²)
Primary (100% access)	35,330	17,482	15.18	49%	2,327
Secondary (<100% access)	172,966	91,073	58.49	53%	2,957
Total	208,296	108,555	73.67	52%	2,827

TABLE 1: FRENCHS FOREST 30MIN CENTRE PROFILE (2016)

Source: ABS Census 2016 (TableBuilder Pro) and Open Data NSW - General Transit Feed Specification (GTFS) 2019

FIGURE 2: FRENCHS FOREST HOSPITAL PLAN REZONING ARTISTS IMPRESSIONS



Source: Daily Telegraph 2017

Areas within the Secondary Catchment have access to the centre, occasionally within the AM peak hour (7-9AM), by using public transport and a 30min cut off time - i.e. <100% access



⁸ Areas within the Primary Catchment have access to the centre, within each minute of AM peak hour (7-9AM), by using public transport and a 30min cut off time - i.e. 100% access



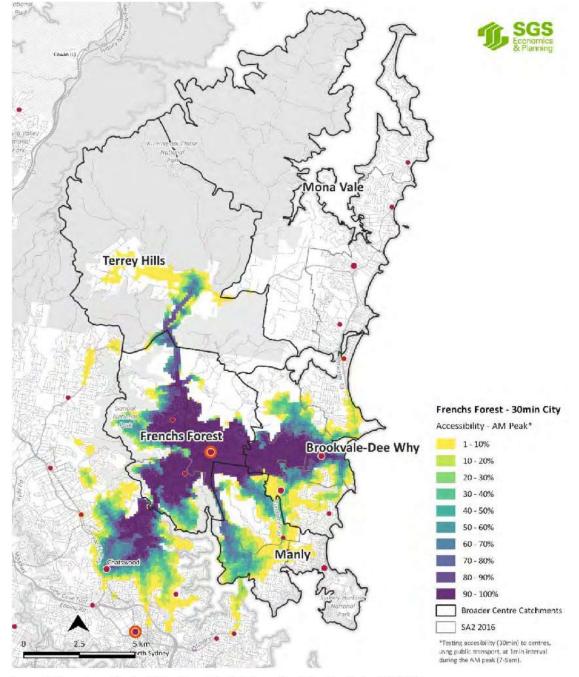


FIGURE 3: 30MIN ACCESSIBILITY TO FRENCHS FOREST DURING AM PEAK- MAP (2019)

Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019

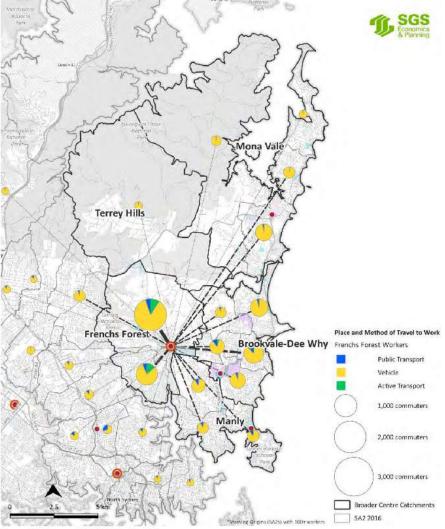




Most workers commute to Frenchs Forest by using private vehicles, despite relatively good public transport connectivity, in particular from the suburbs of *Dee Why-North Curl Curl* and *Beacon Hill-Narraweena*. Large numbers of people locally (within the *Frenchs Forest* broader catchment itself) also use private vehicles to get to work, potentially providing an opportunity for planning policy targeted at increasing the use of *Active Transport* options in this area.

Considering the large number of commuters coming from the suburbs of *Narrabeen-Collaroy* and *Warriewood-Mona Vale*, there might also be options for new bus routes. Noticeably, *Frenchs Forest* has the highest influx of workers from other LGAs in comparison to the other centres.

FIGURE 4: ORIGIN AND METHOD OF TRAVEL OF WORKERS TO FRENCHS FOREST (POW) - MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

TABLE 2: FRENCHS FOREST BROADER CATCHMENT COMMUTER PROFILE - INCOMING (2016)

Centre	Public Transport	Vehicle	Active Transport	Other	Jobs
Frenchs Forest	8%	81%	3%	9%	14,757
Source: ABS Censu:	s 2016 (TableBuilder Pro)			





5.2 Brookvale-Dee Why

Brookvale-Dee Why has the largest Primary Catchment area and Population Density (very high compared to GS averages as well) out of all of the centres within Northern Beaches. It is also the only centre that connects to all other centres within 30min providing an ideal opportunity for the location of regional services in this area. It possesses good connectivity to local centres on the Lower North Shore (Mosman, Cremorne and Neutral Bay).

Compared to the other centres, it has the largest *Population* and *Workforce*, providing potential for further employment and development opportunities.

TABLE 3: DEE WHY 30MIN CENTRE PROFILE (2016)

Centre Catchment	Population	Workforce	Area (km²)	Workforce to Population Ratio	Population Density (per km²)
Primary (100% access)	92,982	51,931	23.90	56%	6,125
Secondary (<100% access)	136,453	72,247	43.66	53%	2,333
Total	229,435	124,178	67.56	54%	3,114

Source: ABS Census 2016 (TableBuilder Pro) and Open Data NSW - General Transit Feed Specification (GTFS) 2019

FIGURE 5: DEE WHY'S NEW TOWN CENTRE



Source: Meriton 2018





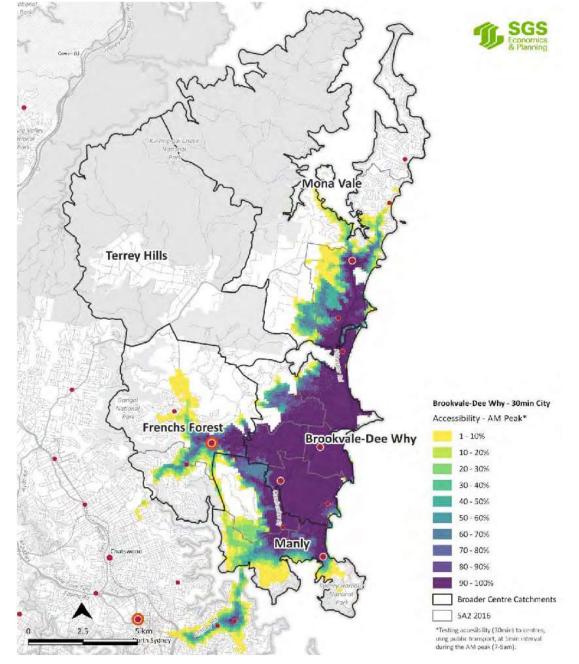


FIGURE 6: 30MIN ACCESSIBILITY TO BROOKVALE-DEE WHY DURING AM PEAK- MAP (2019)

Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019

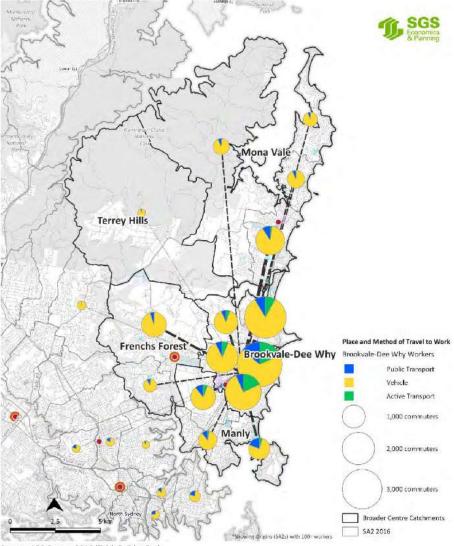




Brookvale-Dee Why has a larger proportion of workers commuting with Public and Active Transport options compared to Frenchs Forest and Mona Vale, but still relatively modest numbers considering its good bus network/connectivity. This is particularly the case within the broader catchment itself (local workers-residents).

One of the key challenges in the future will be to further stimulate *Public* and *Active Transport* use with local resident workers (living and working within the *Brookvale-Dee Why* broader catchment), but also commuters coming from other major centres, in particular *Frenchs Forest* and *Mona Vale*.

FIGURE 7: ORIGIN AND METHOD OF TRAVEL OF WORKERS TO BROOKVALE-DEE WHY (POW) - MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

TABLE 4: BROOKVALE-DEE WHY BROADER CATCHMENT COMMUTER PROFILE - INCOMING (2016)

Centre	Public Transport	Vehicle	Active Transport	Other	Jobs
Brookvale-Dee Why	10%	75%	6%	9%	27,492

Source: ABS Census 2016 (TableBuilder Pro)





5.3 Manly

Manly has a relatively contained catchment and poor connectivity to other areas within the LGA. However, the high *Population Density* and *Workforce to Population Ratio* do compensate for the lack of coverage, creating a compact 30min city. The high *Workforce to Population Ratio*, especially within the *Primary Catchment* testifies to a high number of people in the labour force and overall younger population.

Improved connectivity with the *Brookvale-Dee Why* and *Frenchs Forest* centres with express bus routes could further increase the centres coverage and *Population/Workforce* numbers.

TABLE 5: MANLY 30MIN CENTRE PROFILE (2016)

Centre Catchment	Population	Workforce	Area (km²)	Workforce to Population Ratio	Population Density (per km²)
Primary (100% access)	32,430	19,257	6.48	59%	5,005
Secondary (<100% access)	75,877	41,269	23.23	54%	3,266
Total	108,307	60,526	29.71	56%	3,645

Source: ABS Census 2016 (TableBuilder Pro) and Open Data NSW - General Transit Feed Specification (GTFS) 2019

FIGURE 8: MANLY TOWN CENTRE



Source: sydneyimages.com.au 2016





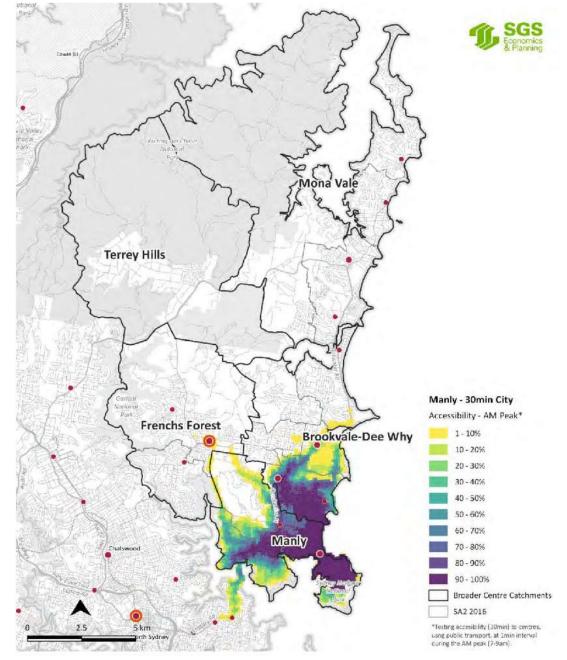


FIGURE 9: 30MIN ACCESSIBILITY TO MANLY DURING AM PEAK- MAP (2019)

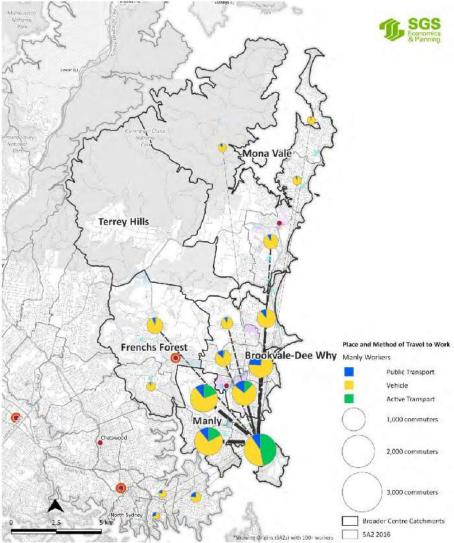
Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019





Manly has a high proportion of people commuting with Active Transport options, in particular within its broader catchment, but also from the suburb of *Freshwater-Brookvale*. The use of *Public Transport* is proportionally higher compared to the *Mona Vale* and *Frenchs Forest* centres, but overall there is a smaller number of commuters coming from areas outside of the centre catchment. This might be a result of the poor connectivity to other parts of the LGA, but also high local self-sufficiency within *Manly*.

FIGURE 10: ORIGIN AND METHOD OF TRAVEL OF WORKERS TO MANLY (POW) - MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

TABLE 6: MANLY BROADER CATCHMENT COMMUTER PROFILE - INCOMING (2016)

Centre	Public Transport	Vehicle	Active Transport	Other	Jobs
Manly	13%	62%	11%	14%	15,052
Source: ABS C	ensus 2016 (TableBuilder Pro)			





5.4 Mona Vale

Mona Vale has a moderate to low 30min public transport area coverage, compared to the other centres on the Northern Beaches and the lowest *Population Densities* in particular within its *Secondary Catchment*. The total *Workforce* numbers are low overall with good connections to the *Brookvale-Dee Why* centre.

TABLE 7: MONA VALE 30MIN CENTRE PROFILE (2016)

Centre Catchment	Population	Workforce	Area (km²)	Workforce to Population Ratio	Population Density (per km²)
Primary (100% access)	25,449	13,008	10.01	51%	2,542
Secondary (<100% access)	64,614	35,757	30.82	55%	2,096
Total	90,063	48,765	40.83	54%	2,206

Source: ABS Census 2016 (TableBuilder Pro) and Open Data NSW - General Transit Feed Specification (GTFS) 2019

FIGURE 11: MONA VALE TOWN CENTRE AND SURROUNDINGS



Source: visitsydneyaustralia.com.au





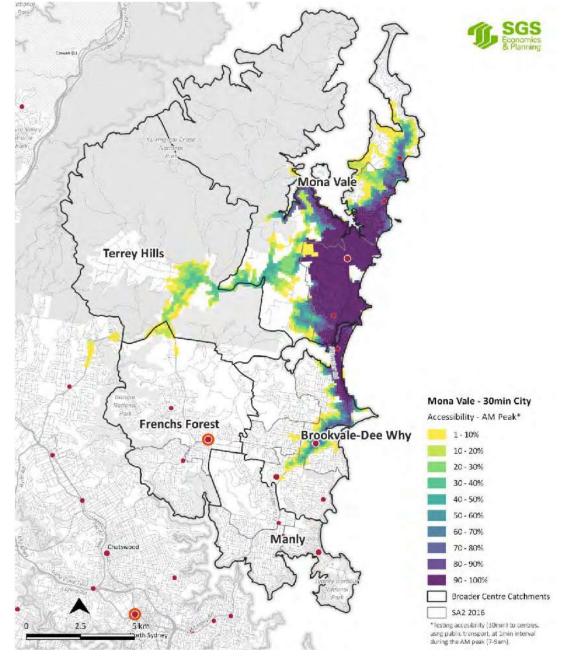


FIGURE 12: 30MIN ACCESSIBILITY TO MOVA VALE DURING AM PEAK- MAP (2019)

Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019

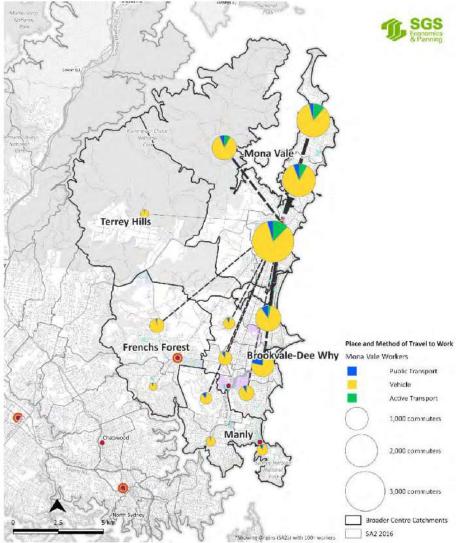


ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

northern beaches council

Overall most people commute using private vehicles. However, *Mona Vale* has the largest number of workers with alternate working arrangements of all of the centres (e.g. *Working at Home)*. Considering the areas linear urban topology (most of development along Pittwater road), there might be opportunity to further stimulate *Public Transport* use along that main axis. Apart from suburbs within the broader catchment itself, most commuters come from the *Brookvale-Dee Why* catchment.

FIGURE 13: ORIGIN AND METHOD OF TRAVEL OF WORKERS TO MONA VALE (POW) - MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

TABLE 8: MONA VALE BROADER CATCHMENT COMMUTER PROFILE - INCOMING (2016)

Centre	Public Transport	Vehicle	Active Transport	Other	Jobs
Mona Vale	7%	73%	5%	15%	18,693
Source: ABS Cen	sus 2016 (TableBuilder Pro)			





6. PEOPLE

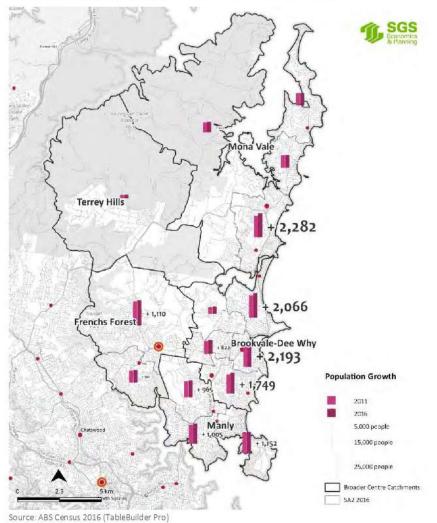
This chapter analyses a number of population based measures and indicators, pointing to historical and forecasted trends and insights

6.1 Population

Where are we now?

Northern Beaches is a growing community. In the past ten years, the population has increased by an additional +27,717 people with most of the growth occurring in the *Brookvale-Dee Why* broader catchment. The rate of growth in this area is nearly twice as high compared to the second ranked *Mona Vale* and *Manly* broader catchments.

FIGURE 14: BROADER CATCHMENTS POPULATION GROWTH - MAP (2011-2016)





Northern Beaches - Demographic Analysis

30



TABLE 9: BROADER CATCHMENTS POPULATION TOTALS AND GROWTH RATES (PUR) (2011-2016)

Geography	2011	2016	Growth	CAGR (5-yr %)
Mona Vale	57,170	60,442	3,272	5.72%
Terrey Hills	3,531	3,653	122	3.46%
Frenchs Forest	36,387	37,998	1,611	4.43%
Brookvale-Dee Why	84,987	92,077	7,090	8.34%
Manly	55,620	58,742	3,122	5.61%
Total	237,641	252,876	15,235	6.40%

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

The population density⁹ has also increased as a result of infill housing and new high density residential flat-building developments. As with population growth, growth is focused in *Brookvale-Dee Why* and *Manly*. These areas have also historically been more established, explaining the larger densities in the past and over time.

TABLE 10: BROADER CATCHMENTS POPULATION DENSITY (PER KM²) TOTALS AND GROWTH RATES (2011-2016)

Geography	2011	2016	Growth (%)
Mona Vale	1,942	2,032	4.63%
Terrey Hills	350	362	3.46%
Frenchs Forest	1,788	1,872	4.69%
Brookvale-Dee Why	3,962	4,287	8.21%
Manly	4,302	4,544	5.63%
Total	2,521	2,675	6.09%

Source: ABS Census 2011 and 2016 (TableBuilder Pro), DPE - Standard Instrument Local Environmental Plan (LEP) - Land Use Zoning (LZN), 2018

Note: Place of Usual (PUR) - Some undercounting inevitably occurs for various reasons during Census count. Although adjustments are available for certain indicators in the form of Estimated Resident Population (ERP) based datasets, these haven't been used in this report, in order to achieve consistency across all indicators. However, as population total is an important indicator, ERP numbers have been provided in the table below for comparison. Reference disclaimer at the start of Section 5 for more details.

TABLE 11: BROADER CATCHMENTS ESTIMATED POPULATION TOTALS AND GROWTH RATES (ERP) (2011-2016)

Geography	2011	2016	Growth	CAGR (5-yr %)
Mona Vale	60,455	63,304	2,849	4.71%
Terrey Hills	3,699	3,786	87	2.35%
Frenchs Forest	38,274	39,360	1,086	2.84%
Brookvale-Dee Why	89,773	96,535	6,762	7.53%
Manly	59,495	62,483	2,988	5.02%
Total	251,696	265,468	13,772	5.47%

Source: ABS ERP 2011 and 2016 (ABS Stat)

⁹ Density (per km²) is calculated by dividing population with area. Area is calculated by using built form only, as defined in ABS Meshblocks (excluding national parks, agriculture land etc.). This encompasses the following Meshblock categories: Residential, Commercial, Education, Hospital/Medical and Industrial





How are we different?

Northern Beaches five-year growth rate has been similar to the North District (District) and slightly lower compared to Greater Sydney (GS). The population density is lower compared to the District averages as well is the densification growth rate. The density has reached similar levels to Greater Sydney and has been similar to it in the past.

TABLE 12: COMPARATIVE POPULATION TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (5-yr %)
Greater Sydney	3,821,233	4,079,432	4,496,184	674,951	8.47%
North District	766,240	808,651	850,382	84,142	5.35%
Northern Beaches	225,109	237,641	252,876	27,767	5.99%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

TABLE 13: COMPARATIVE POPULATION DENSITY (PER KM²) TOTALS AND GROWTH RATES (2011-2016)

Geography	2006	2011	2016	Growth (%)
Greater Sydney	N/A	2,560	2,623	2.49%
North District	N/A	2,814	3,046	8.25%
Northern Beaches	N/A	2,521	2,675	6.09%

Source: ABS Census 2011 and 2016 (TableBuilder Pro), DPE - Standard Instrument Local Environmental Plan (LEP) - Land Use Zoning (LZN), 2018

Where are we going?

A number of industry standard population forecasts, originating from various state agencies and private providers, have been analysed in this study. As forecasts come in many forms, and are produced using different methods, assumptions and quantifications, as well as a range of sources it is important to understand that discrepancies between the different sources are an inevitable outcome of the process. It is also important to stress, that forecasts merely represent a rough proxy of what might happen in the future and are not a definitive measure.

The main forecast used in this report is provided by TfNSW - TPA division. These population projections are commonly used across various government and private sector projects and are considered the "default" go to source. They provide small area projections (Travel Zone), consistency across the Sydney Metro Area and incorporate DPE control totals.

Apart from TfNSW, DPE and Profile.ID forecasts are also quite common in the planning world. DPE projections are also incorporated as LGA "control totals" within the TfNSW - TZP16 v1.5 datasets, so what TfNSW effectively does, is distribute the data to smaller level geographies (TZ) and works more closely on defining the 1-digit ANZSIC employment numbers.

The other related studies (housing, employment and social) have used the following datasets:

TABLE 14: FORECASTED DATASETS USED IN OTHER STUDIES

Study	Source
Housing	DPE Main Series
Employment	TfNSW TZP16 v1.5
Social	TfNSW TZP16 v1.5

Source: SGS Economics and Planning

Note: Although PUR was used as the main source for historical data in the other studies as well, some indicators were adjusted and ABS ERP numbers were used instead - i.e. Social Study has used ERP historical data instead of PUR to calculate the difference between future (TfNSW - TZP16 v1.5) and current (ABS ERP) demand.



Looking at TfNSW projections, Northern Beaches is forecasted to have lower growth rates, compared to both the GS area and District but also compared to historical trends. Growth is forecasted at 39,359 people between 2016 and 2036 for Northern Beaches, which represents an additional +3.68% each five years. Projected GS rates are at +8.62% and the Districts at +5.50%.

TABLE 15: ABS HISTORICAL AND TFNSW FORECASTED COMPARATIVE POPULATION TOTALS AND GROWTH RATES (2016-2036)

Geography	2016	2021	2026	2031	2036	Growth 16-36	CAGR (5-yr%)		
Greater Sydney	4,496,184	4,976,423	5,397,508	5,810,257	6,257,861	1,761,677	8.62%		
North District	850,382	912,298	955,989	1,003,553	1,053,354	202,972	5.50%		
Northern Beaches	252,876	266,220	273,600	282,359	292,235	39,359	3.68%		
Source: ABS Census 20:	ource: ABS Census 2016 and TfNSW – Travel Zone Projections 2016 (TZP16 v1.5)								

Source: ABS Census 2016 and TINSW — Travel 20ne Projections 2016 (12P16 V1.5)

DPE series - main population projection, assume 297,950 people at 2036 in Northern Beaches LGA, while the high series forecast 317,050 people.

TABLE 16: DPE FORECASTED POPULATION TOTALS AND GROWTH RATES SERIES - NORTHERN BEACHES (2021-2036)

Series	2021	2026	2031	2036	Growth 21-36	CAGR (5-yr %)
High	274,350	286,150	300,700	317,050	42,700	4.94%
Main	270,050	278,000	287,650	297,950	27,900	3.33%
Low	266,100	269,950	274,250	277,850	11,750	1.45%

Source: DPE - NSW Population Projections 2016





6.2 Migration and Resident Structure

The following Resident Structure definitions and reasoning has been applied:

- Local (indicating residents that have lived in Northern Beaches for 5 years or more)
- Internal (residents that have migrated to Northern Beaches in the past 5 years from other parts of Australia);
- Overseas (residents that have migrated to Northern Beaches in the past 5 years from overseas);
- Unknown (residents that have unknown origin)

Where are we now?

The majority of people moving to the Northern Beaches are coming from other parts of Australia - mostly Sydney (internal migration). However, larger numbers of overseas migrants are locating in *Manly* and *Brookvale-Dee Why*. Particular hot spots for overseas migration are the suburbs of *Manly-Fairlight (British* and *Western European* ancestry), *Dee Why-Curl Curl (British, Southern Asian* and *Other North-East Asian)* and *Freshwater-Brookvale (British* and *Southern European)*.

These three suburbs contain approximately 50% of the number of overseas migrants in the past five years. Reasons for such trends are most likely related to housing diversity and affordability (larger number of units), better connectivity to the City and proximity to natural amenity such as beaches.

TABLE 17: BROADER CATCHMENTS RESIDENT STRUCUTRE AND MIGRATION ORIGIN TOTALS (2016)

Geography	Local	Internal	Overseas
Mona Vale	45,552	6,279	2,085
Terrey Hills	2,678	479	94
Frenchs Forest	28,561	4,280	1,663
Brookvale-Dee Why	64,661	9,321	6,541
Manly	38,820	6,818	5,872
Total	180,269	25,850	16,243
0 ADO 0 0046/2			

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 18: BROADER CATCHMENTS RESIDENT STRUCUTRE AND MIGRATION ORIGIN PROPORTIONS (2016)

Geography	Local	Internal	Overseas
Mona Vale	84%	12%	4%
Terrey Hills	82%	15%	3%
Frenchs Forest	83%	12%	5%
Brookvale-Dee Why	80%	12%	8%
Manly	75%	13%	11%
Total	81%	12%	7%

Source: ABS Census 2016 (TableBuilder Pro)





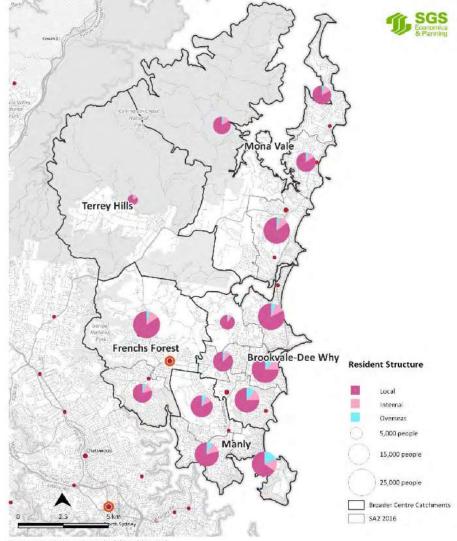


FIGURE 15: BROADER CATCHMENTS RESIDENT STRUCTURE AND MIGRATION ORIGIN - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

The age profile of the three residential groups is also quite different. The *Local* resident structure (resided within the Northern Beaches for over 5 years) is most aged, predominantly composed of *Mature Adults* and *Retirees*, while the structure of migrants is more inclined to younger groups. *Overseas* migrants have a particularly high proportion of *Adults*, and *Young Adults*, while the population coming from other parts of Australia has higher rates of *Adults*. This means that Northern Beaches relies and will rely, if the trends persevere, on these inflowing structures to "replenish" the workforce and rejuvenate the population in the future.





TABLE 19: BROADER CATCHMENTS AGE PROFILE¹⁰ OF LOCAL RESIDENTS (2016)

Geography	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
Mona Vale	N/A	21.90%	8.74%	16.26%	31.68%	21.43%
Terrey Hills	N/A	23.45%	8.51%	14.41%	32.52%	21.10%
Frenchs Forest	N/A	25.30%	8.14%	14.82%	29,48%	22.26%
Brookvale-Dee Why	N/A	20.32%	10.01%	22.28%	29.76%	17.63%
Manly	N/A	22.09%	8.24%	20.62%	30.56%	18.50%
Total	N/A	21.93%	8.99%	19.10%	30.41%	19.56%

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 20: BROADER CATCHMENTS AGE PROFILE OF INTERNAL MIGRANTS (2016)

Geography	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
Mona Vale	N/A	16.24%	11.53%	27.11%	27.98%	17.14%
Terrey Hills	N/A	25.89%	9.19%	26.93%	24.63%	13.36%
Frenchs Forest	N/A	22.97%	8.60%	40.05%	18.74%	9.65%
Brookvale-Dee Why	N/A	11.88%	21.08%	40.29%	17.12%	9.63%
Manly	N/A	14.86%	18.44%	40.54%	19.89%	6.28%
Total	N/A	15.63%	16.04%	37.03%	20.71%	10.59%

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 21: BROADER CATCHMENTS AGE PROFILE OF OVERSEAS MIGRANTS (2016)

Geography	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
Mona Vale	N/A	24.70%	15.73%	33.91%	20.38%	5.28%
Terrey Hills	N/A	26.60%	11.70%	36.17%	25.53%	0.00%
Frenchs Forest	N/A	36.26%	9.08%	33.85%	16.90%	3.91%
Brookvale-Dee Why	N/A	16.13%	28.59%	43.10%	9.94%	2.25%
Manly	N/A	15.41%	26.24%	46.00%	10.59%	1.75%
Total	N/A	19.09%	24.00%	41.98%	12.32%	2.61%

Source: ABS Census 2016 (TableBuilder Pro)

The LGAs of origin for people moving to the Northern Beaches, from other parts of Australia, are in the North District and local areas such as *Ku-ring-gai*, *North Sydney*, and *Willoughby*. As the main age cohort of these migrants are *Adults* and *Mature Adults* it is fair to assume that they are making the transition to a more "family based' area rich with natural amenity with the purpose of settling and purchasing homes.

¹⁰ Age profile definition and reasoning: Children 0-5 (still out of school system); Youth 5-20 (mostly still living with parents); Young Adult 20-30 (starting to move out, becoming independent, saving for deposit); Adult 30-45 (starting a family, buying a house); Mature Adults 45-65 (moving to better neighbourhood, settling long term, less mobile); Retirees 65+ (mainly out of work force)





Geography	2016	%
Overseas	16,243	38.59%
Ku-ring-gai	2,222	5.28%
North Sydney	2,008	4.77%
Willoughby	1,642	3.90%
Sydney	1,424	3.38%
Mosman	1,317	3.13%
Hornsby	1,151	2.73%
Inner West	1,145	2.72%
Other	14,117	33.54%
Total	42,093	100%

TABLE 22:SOURCE OF MIGRATION (FROM OTHER PARTS OF AUSTRALIA/OVERSEAS) - PAST 5 YEARS (2016)

Source: ABS Census 2016 (TableBuilder Pro)

People that are moving out of the Northern Beaches are migrating to areas either:

- outside of Greater Sydney that have a similar lifestyle Central Coast and Gold Coast large number of Adults (most likely due to affordability) but also Retirees
- more vibrant locations closer to Sydney CBD Sydney, Inner West and North Sydney very high numbers of Young Adults (due to lifestyle, amenity, proximity to work and nightlife)
- surrounding LGAs with similar lifestyle Ku-ring-gai, Willoughby, Hornsby and Mosman larger number of Mature Adults and Adults

Geography (LGA)	Children	Youth	Young Adult	Adult	Mature Adult	Retiree	Total
Central Coast	0.00%	15.80%	8.61%	35.12%	22.57%	17.90%	2,340
North Sydney	0.00%	8.67%	31.24%	30.92%	21.81%	7.35%	1,595
Ku-ring-gai	0.00%	23.44%	13.19%	27.65%	25.12%	10.60%	1,413
Sydney	0.00%	5.76%	47.38%	27.62%	13.99%	5.25%	1,372
Gold Coast	0.00%	18.49%	10.21%	29.99%	23.64%	17.66%	1,079
Willoughby	0.00%	15.92%	19.96%	28.03%	25.08%	11.01%	915
Inner West	0.00%	5.90%	42.72%	29.96%	16.49%	4.93%	832
Hornsby	0.00%	16.96%	15.58%	38,44%	19.35%	9.67%	791
Mosman	0.00%	17.14%	17.66%	25.97%	27.79%	11.43%	767

TABLE 23:LOCATION OF MIGRATION (TO OTHER PARTS OF AUSTRALIA) - PAST 5 YEARS (2016)

Source: ABS Census 2016 (TableBuilder Pro)

How are we different?

Northern Beaches has a slightly lower proportion of *Overseas* migration compared to GS and the District, while both the District and Northern Beaches have higher ratios of *Internal* migration compared to GS.





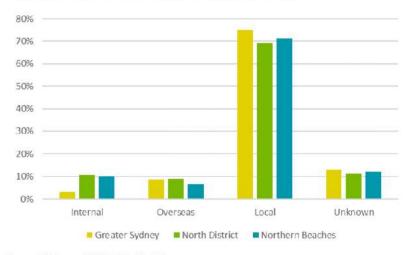
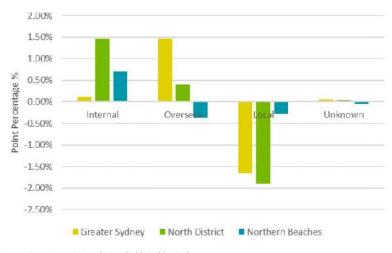


FIGURE 16: COMPARATIVE MIGRATION/RESIDENT STRUCTURE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Trends are showing a higher increase in the proportion of *Internal* migration in the District and Northern Beaches with *Locals* being less mobile and more established in the Northern Beaches.

FIGURE 17: COMPARATIVE PROPORTIONAL CHANGE IN MIGRATION/RESIDENT STRUCTURE (2006-2016)



Source: ABS Census 2011 and 2016 (TableBuilder Pro)





6.3 Age Profile

The following Age Profile definitions and reasoning has been applied:

- Children 0-5 (still out of school system);
- Youth 5-20 (mostly still living with parents);
- Young Adult 20-30 (starting to move out, becoming independent, saving for deposit);
- Adult 30-45 (starting a family, buying a house);
- Mature Adult 45-65 (moving to better neighbourhoods, settling long term, less mobile);
- Retirees 65+ (mainly out of work force)¹¹

Where are we now?

Northern Beaches has an increasingly ageing population (as is most of GS). A high number of *Retirees* and *Mature Adults* are located in nearly all suburbs with the exception of *Manly-Fairlight, Freshwater-Brookvale* and *Dee Why-North Curl Curl* - having larger proportions of *Adults* and *Young Adults*. Most of the *Youth* is located in the same suburbs as *Mature Adults* (indicating established family households), with higher proportions of *Children* in *Dee Why-North Curl Curl* and *Freshwater-Brookvale* (indicating new family households).

TABLE 24: BROADER CATCHMENTS AGE PROFILE TOTALS (2016)

Geography	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
Mona Vale	3,411	11,897	5,344	10,315	17,446	11,991
Terrey Hills	177	802	300	585	1,099	693
Frenchs Forest	2,165	8,990	2,953	6,691	9,869	7,417
Brookvale-Dee Why	6,067	16,005	11,039	22,441	22,873	13,630
Manly	3,865	10,835	6,534	14,341	14,603	8,502
Total	15,685	48,529	26,170	54,373	65,890	42,223

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 25: BROADER CATCHMENTS AGE PROFILE PROPORTIONS (2016)

Children	Youth	Young Adult	Adult	Mature Adult	Retiree
6%	20%	9%	17%	29%	20%
5%	22%	8%	16%	30%	19%
6%	24%	8%	18%	26%	19%
7%	17%	12%	24%	25%	15%
7%	18%	11%	24%	25%	14%
6%	19%	10%	22%	26%	17%
	6% 5% 6% 7% 7%	6% 20% 5% 22% 6% 24% 7% 17% 7% 18%	6% 20% 9% 5% 22% 8% 6% 24% 8% 7% 17% 12% 7% 18% 11%	6% 20% 9% 17% 5% 22% 8% 16% 6% 24% 8% 18% 7% 17% 12% 24% 7% 18% 11% 24%	Adult Adult 6% 20% 9% 17% 29% 5% 22% 8% 16% 30% 6% 24% 8% 18% 26% 7% 17% 12% 24% 25% 7% 18% 11% 24% 25%

Source: ABS Census 2016 (TableBuilder Pro)

¹¹ Although some people remain in the workforce after the age of 65, to be eligible for Age Pension you must be 65 or older





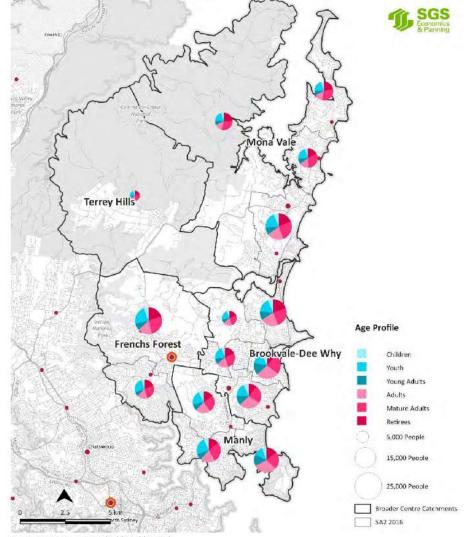


FIGURE 18: BROADER CATCHMENTS AGE PROFILE STRUCTURE – MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Strong growth trends have been particularly present in the *Retiree, Mature Adult* and *Youth* cohorts, with the remaining groups remaining relatively stagnant.

TABLE 26: LOCAL AGE PROFILE TOTALS AND GROWTH RATES (2006-2016	TABLE 26: LOCA	A AGE PROFILE TO	TALS AND GROW	TH RATES	(2006-2016)
--	----------------	------------------	---------------	----------	-------------

Year	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
2016	15,672	48,591	26,045	54,278	65,816	42,467
2011	17,018	43,319	25,521	54,712	60,247	36,850
2006	15,156	40,607	25,812	54,019	55,874	33,668
Growth	516	7,984	233	259	9,942	8,799
CAGR (5-yr %)	1.69%	9.39%	0.45%	0.24%	8.53%	12.31%

Source: ABS Census 2016 (TableBuilder Pro)

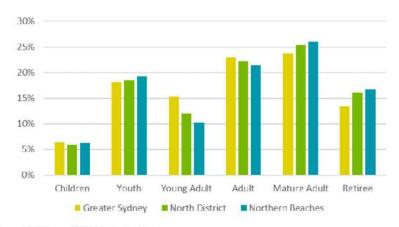




How are we different?

Northern Beaches has a larger proportion of *Retirees, Mature Adults* and *Youth* compared to the District and particularly GS, indicating the strong family orientation of the LGA but also more pronounced ageing population trends (combined with distinctively lower proportions of *Young Adults*).

FIGURE 19: COMPARATIVE AGE PROFILE STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Trends are showing a bigger decline in the proportion of *Adults* in Northern Beaches than those of GS and the District over the past ten years, with greater growth trends in *Mature Adults* and *Youth* in particular. *Retirees* are increasing across all compared areas.

FIGURE 20: COMPARATIVE PROPORTIONAL CHANGE IN AGE PROFILE STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Where are we going?

Northern Beaches is forecasted to have a continued increase in the number of *Retirees* and *Mature Adults*. Compared to historical data, *Youth* is forecasted to stagnate while *Young Adults* to increase (may be an indication of the younger age cohort transitioning to the





following *Young Adult*), under the assumption that the previous outflow of this category will cease).

TABLE 27: LOCAL COMPARATIVE FORECASTED AGE PROFILE TOTALS AND GROWTH RATES - (2021-2036)

Year	Children	Youth	Young Adult	Adult	Mature Adult	Retiree
2036	17,870	53,420	31,871	56,599	74,408	58,066
2031	17,425	52,719	30,529	55,737	72,867	53,083
2026	17,354	52,276	28,717	55,726	71,341	48,185
2021	17,684	51,107	27,556	55,982	70,064	43,827
Growth	187	2,313	4,315	617	4,344	14,239
CAGR (5-yr %)	0.35%	1.49%	4.97%	0.37%	2.03%	9.83%

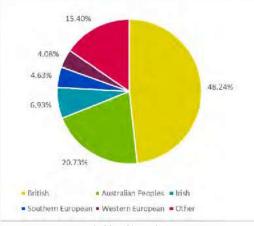
Source: TfNSW – Travel Zone Projections 2016 (TZP16 v1.5)

6.4 Ancestry and Language Spoken at Home

Where are we now?

Northern Beaches has a very homogeneous ancestry structure with over 65% of people being of European ancestry and 20% of Australian. The main ancestry groups are British, Australian, Irish, Southern European and Western European. The most multicultural suburbs are Dee Why-North Curl Curl, Beacon Hill-Narraweena and Forestville-Killarney Heights (possibly related to influx of refugees in the 1990s).

FIGURE 21: LOCAL ANCESTRY STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Trends are showing a further increase of people of *British* ancestry (+4.2%) in the overall proportion and a decline of people of *Australian* decent (-6.8%).

TABLE 28: LOCAL CHANGE IN ANCESTRY STRUCTURE (2006-2016)

Rank	Ancestry	Change (PP%)
1	British	4.28%
2	Southern Asian	0.64%
3	Chinese Asian	0.47%





35	South Eastern European	-0.20%	
36	New Zealand Peoples	-0.20%	
37	Australian Peoples	-6.80%	

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Most people speak *English* at home, with *Other* languages representing a small proportion of the total percentage.

O.96%
 Other
 Other

Source: ABS Census 2016 (TableBuilder Pro)

FIGURE 22: LOCAL LANGUAGE SPOKEN AT HOME STRUCTURE (2016)

However, despite a strong presence, *English* as the primary language spoken at home, has decline in the overall proportion with *Iberian Romance* increasing the most.

TABLE 29: LOCAL CHANGE IN LANGUAGE SPOKEN AT HOME STRUCTURE (20	2006-2016)
---	------------

Rank	Language	Change (PP%)
1	Iberian Romance	1.18%
2	Indo-Aryan	0.56%
3	French	0.38%
58	South Slavic	-0.18%
59	Italian	-0.32%
60	English	-3.19%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

How are we different?

Northern Beaches is a lot more homogenous than the District and particular GS when it comes to ancestry. Compared to those areas, Northern Beaches has a much lesser proportion of *Chinese Asian, Southern Asian* and *Southern European* ancestries, as well as less people speaking *Chinese, Indo-Aryan* and *Middle Eastern* at home, with higher rates of *English* speaking people of *British* decent.





6.5 Education

Where are we now?

Northern Beaches has a close to 65-35% split between residents with Secondary Education/VET¹² and those with tertiary education¹³ qualifications. Areas with high numbers of people possessing tertiary education are particularly within the Manly broader catchment (Manly-Fairlight and Balgowlah - Clontarf - Seaforth). Suburbs with lower levels of educational attainment are in the suburbs of Beacon Hill-Narraweena and Cromer.

Geography	Secondary Education	VET	Undergraduate	Postgraduate
Mona Vale	15,279	15,215	9,854	4,058
Terrey Hills	982	869	554	243
Frenchs Forest	9,941	8,045	6,554	2,943
Brookvale-Dee Why	23,779	22,271	15,537	6,048
Manly	12,123	10,601	13,602	6,236
Total	62,104	57,002	46,099	19,550

TABLE 30: BROADER CATCHMENTS EDUCATION PROFILE TOTALS (2016)

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 31: BROADER CATCHMENTS EDUCATION PROFILE PROPORTIONS (2016)

Geography	Secondary Education	VET	Undergraduate	Postgraduate
Mona Vale	34%	31%	25%	11%
Terrey Hills	34%	34%	22%	9%
Frenchs Forest	37%	33%	21%	9%
Brookvale-Dee Why	36%	29%	24%	11%
Manly	35%	33%	23%	9%
Total	34%	31%	25%	11%

Source: ABS Census 2016 (TableBuilder Pro)

Looking at the resident structure cross tabbed with educational attainment, it is evident that the Overseas and population Migrating out of the Northern Beaches have higher levels of attainment compared to the Local population.

TABLE 32: EDUCATION PROFILE OF LOCAL RESIDENTS AND OVERSEAS MIGRANTS (2016)

Origin	Secondary Education	VET	Undergraduate	Postgraduate
Local	35.62%	32.18%	22.80%	9.40%
Overseas	25.92%	20.58%	36.58%	16.92%
Migrating out ¹⁴	24.50%	21.21%	39.56%	14.73%
Migrating out ¹⁴	24.50%	21.21%	39.56%	

Source: ABS Census 2016 (TableBuilder Pro)

12 Vocational education and training - Designed to deliver workplace-specific skills and knowledge, vocational education and training (VET) covers a wide range of careers and industries, including trade and office work, retail, hospitality and technology. ¹³ Tertiary education considers Undergraduate and Postgraduate degrees.

¹⁴ People that have migrated to the "inner city" councils in the past 5 years: North Sydney, Sydney CBD and Inner West





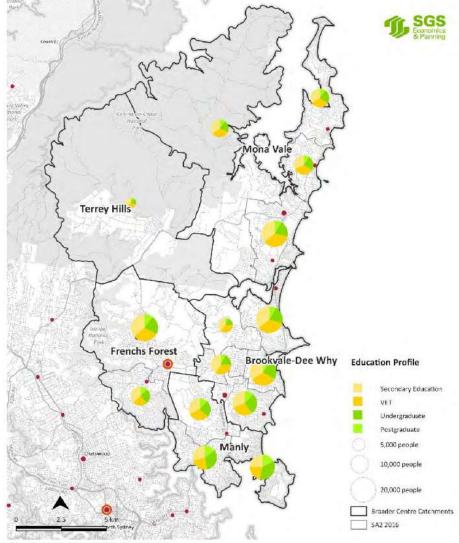


FIGURE 23: BROADER CATCHMENTS EDUCATION PROFILE - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

The highest number of students are located in the postcodes of *Dee Why, Balgowlah* and *Beacon Hill* with an overall annual growth rate of 2.26%.





Postcode	2013	2014	2015	2016	Growth	CAGR (5-yr %)
Dee Why	1,527	1,576	1,613	1,673	146	3.09%
Balgowlah	1,202	1,232	1,217	1,233	31	0.85%
Beacon Hill	1,018	1,020	1,060	1,067	49	1.58%
Narrabeen	746	764	773	790	44	1.93%
Frenchs Forest	738	778	771	775	37	1.64%
Avalon	740	754	767	766	26	1.16%
Collaroy	690	714	746	763	73	3.41%
Forestville	621	626	676	717	96	4.91%
Freshwater	603	648	717	691	88	4.65%
Manly	653	692	675	662	9	0.46%
Belrose	598	603	638	605	7	0.39%
Newport	497	558	555	552	55	3.56%
Mona Vale	499	511	530	514	15	0.99%
Seaforth	457	463	489	480	23	1.65%
Warriewood	259	277	315	323	64	7.64%
Fairlight	292	299	316	310	18	2.01%
Bayview	187	190	200	203	16	2.77%
Terrey Hills	212	213	216	201	-11	-1.76%
Church Point	90	99	108	117	27	9.14%
Palm Beach	75	71	92	74	-1	-0.45%
Total	11,704	12,088	12,474	12,516	812	2.26%

TABLE 33: POSTCODE HIGHER EDUCATION STUDENTS TOTALS AND GROWTH RATES (2013-2016)

Source: Department of Education (DET) 2018

The most attended major universities are *Macquarie*, *The University of Sydney*, *UTS* and *UNSW* attributing to more than 50% of Northern Beaches higher education students.

TABLE 34: MAJOR UNIVERSITIES OF ATTENDANCE FOR NORTHERN BEACHES RESIDENTS (2013-2016)

University	2013	2014	2015	2016	Growth	CAGR (5-yr %)
Macquarie University	2,079	2,224	2,257	2,307	228	4%
The University of Sydney	1,905	1,889	1,915	1,840	-65	-1%
University of Technology Sydney (UTS)	1,645	1,652	1,714	1,702	57	1%
University of New South Wales (UNSW)	1,312	1,320	1,399	1,385	73	2%
Charles Sturt University	718	661	652	651	-67	-3%
Australian Catholic University	456	548	602	636	180	12%
The University of Notre Dame Australia	426	421	416	367	-59	-5%
The University of New England	351	338	338	323	-28	-3%
The University of Newcastle	245	286	282	233	-12	-2%
University of Tasmania	143	180	197	211	68	14%
Western Sydney University	215	226	232	199	-16	-3%
Other	2,209	2,343	2,470	2,662	453	6%
Total	11,704	12,088	12,474	12,516	812	2.26%

Source: Department of Education (DET) 2018



Northern Beaches - Demographic Analysis

46

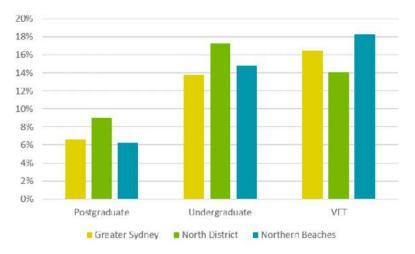


How are we different?

Note: Due to the way ABS has captured data, historical comparison between *Secondary Education* and other educational attainments is not possible. Hence *Secondary Education* has been excluded from the analysis.

Northern Beaches has a larger proportion of people with VET qualifications, than the District and GS ,and somewhat lower level of *Postgraduates* (could be attributed to *Young Adults* moving out to area closer to Sydney CBD see). The proportion of *Undergraduates* is higher than the GS but lower than the District.

FIGURE 24: COMPARATIVE EDUCATION PROFILE STRUCTURE (2016)15



Source: ABS Census 2016 (TableBuilder Pro)

There has been a growth in the percentage of people with higher education across all areas and a decline in *VET* qualifications indicating an increasingly skilled population.



FIGURE 25: COMPARATIVE PROPORTIONAL CHANGE IN EDUCATION PROFILE STRUCTURE (2006-2016)¹⁵

¹⁵ As proportion of total population



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



6.6 Indigenous Status

Where are we now and How we are different?

There is about 1,391 people (about 0.5% of the population) in Northern Beaches declaring to be of *Indigenous*¹⁶ origin. This rate is lower when compared to GS but higher than that of the District. Particular hotspots for people of *Indigenous* origin, are the suburbs of *Beacon Hill-Narraweena* and *Warriewood-Mona Vale*. Overall the proportion of *Indigenous* people has slightly increased in the Northern Beaches (which might be linked to a higher response rate - previously *Not Stated* and not attribute to actual growth).

TABLE 35: COMPARATIVE INDIGENOUS POPULATION TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (5-yr %)
Greater Sydney	37,035	45,735	57,655	20,620	24.77%
North District	1,868	2,464	3,289	1,421	32.69%
Northern Beaches	699	970	1,391	692	41.07%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

TABLE 36: COMPARATIVE INDIGENOUS POPULATION RATIOS¹⁷ AND PROPORTIONAL CHANGES (2006-2016)

Geography	2006	2011	2016	Proportional Change (PP%)
Greater Sydney	0.97%	1.12%	1.28%	0.31%
North District	0.24%	0.30%	0.39%	0.14%
Northern Beaches	0.31%	0.41%	0.55%	0.24%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

¹⁶ Encompasses Aboriginal, Torres Strait Islander and both Aboriginal and Torres Strait Islander people
¹⁷ As ratio of total population





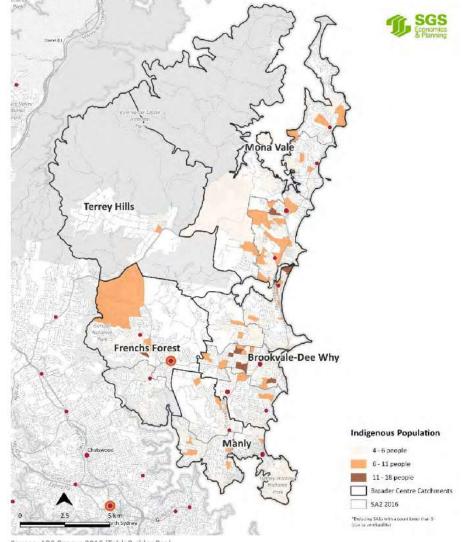


FIGURE 26: BROADER CATCHMENTS INDIGENOUS POPULATION - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

6.7 People with a Disability

Where are we now and How we are different?

There are 9,276 people that require assistance in a core activity residing in the Northern Beaches (about 3.67% of the population). Hotspots (dark blue shade) are located in specific locations within a number of suburbs - most likely linked to retirement communities and aged care facilities. The overall rate of people requiring assistance is slightly lower compared to GS but has experienced a slight proportional increase historically.

TABLE 37: COMPARATIVE TOTALS AND GROWTH RATES FOR POPULATION WITH NEED FOR ASSISTANCE IN CORE ACTIVITIY (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (5-yr %)
Greater Sydney	140,218	174,381	215,054	74,836	23.84%





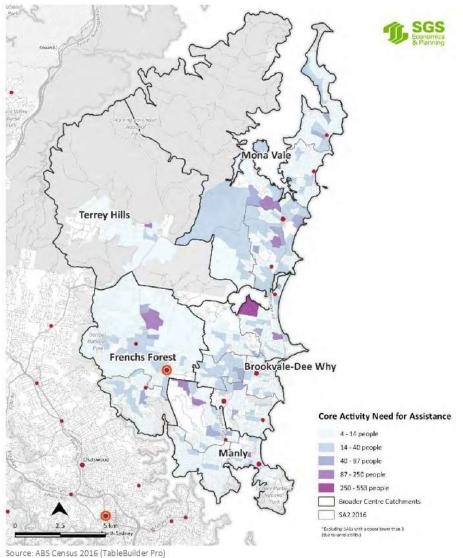
North District	23,754	27,224	31,896	8,142	15.88%
Northern Beaches	6,695	7,883	9,276	2,581	17.71%
Source: ABS Census 2006	2011 and 2016 (TableBuilder Pro)			

TABLE 38; COMPARATIVE RATIOS AND PROPORTIONAL CHANGES IN POPULATION WITH NEED FOR ASSISTANCE IN CORE ACTIVITIY (2006-2016)

Geography	2006	2011	2016	Proportional Change (PP%)
Greater Sydney	3.67%	4.27%	4.78%	1.11%
North District	3.10%	3.37%	3.75%	0.65%
Northern Beaches	2.97%	3.32%	3.67%	0.69%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

FIGURE 27: BROADER CATCHMENTS POPULATION WITH NEED FOR ASSISTANCE IN CORE ACTIVITY - MAP (2016)





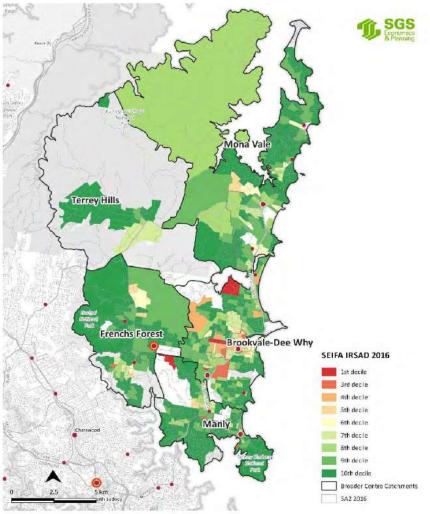


6.8 Socio-Economic Status (IRSAD)¹⁸

Where are we now?

Most areas on the Northern Beaches are relatively advantaged with small pockets of disadvantaged communities. Most of the lower scoring areas are in *Narraweena* and *Dee Why* and highest scoring suburbs are *Balgowlah-Clontarf-Seaforth* and *Frenchs Forest -Belrose*.

FIGURE 28: BROADER CATCHMENTS SEIFA IRSAD - MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

¹⁸ The Index of Relative Socio-economic Advantage and Disadvantage (IRSAD) summarises information about the economic and social conditions of people and households within an area, including both relative advantage and disadvantage measures.

A low score indicates relatively greater disadvantage and a lack of advantage in general. For example, an area could have a low score if there are:

many households with low incomes, or many people in unskilled occupations, AND

few households with high incomes, or few people in skilled occupations.

A high score indicates a relative lack of disadvantage and greater advantage in general. For example, an area may have a high score if there are:

- many households with high incomes, or many people in skilled occupations, AND
- few households with low incomes, or few people in unskilled occupations.





Although all suburbs have experienced a small drop in their scores, they have remained in the same decile¹⁹ as in the previous Census period. However, the drop is scores, reflects broader national trends in decreasing social opportunities and living standards.

TABLE 39:SUBURB SEIFA IRSAD SCORE (2016)

Geography	2011 - Score	2016 - Score	Decile ²⁰	Change in Score
Balgowlah - Clontarf - Seaforth	1,118	1,141	10	-23
Manly - Fairlight	1,104	1,114	9	-10
Avalon - Palm Beach	1,107	1,121	9	-14
Bayview - Elanora Heights	1,108	1,125	9	-17
Newport - Bilgola	1,107	1,126	9	-20
Warriewood - Mona Vale	1,094	1,100	9	-5
Beacon Hill - Narraweena	1,050	1,059	8	-9
Cromer	1,085	1,093	8	-8
Dee Why - North Curl Curl	1,054	1,057	7	-4
Forestville - Killarney Heights	1,097	1,118	9	-22
Frenchs Forest - Belrose	1,112	1,139	10	-26
Freshwater - Brookvale	1,095	1,102	9	-7
Manly Vale - Allambie Heights	1,089	1,094	9	-5
Narrabeen - Collaroy	1,089	1,094	9	-5
Terrey Hills - Duffys Forest	1,106	1,125	9	-19
Northern Beaches	1,111	1,092	10	-19

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

How are we different?

Northern Beaches is amongst the highest SEIFA-IRSAD decile and scoring LGAs in Australia, indicating the high standard of living, skilled population and overall larger number of opportunities available to its residents. However, the average score of the LGA has decreased slightly compared to the GS in the past 5 years.

TABLE 40: COMPARATIVE SEIFA IRSAD TOTALS AND GROWTH RATES (2011-2016)

Geography	2011 - Score	2016 - Score	Decile	Change in Score
Greater Sydney	1,047	1,039	8	-8
North District	1,117	1,097	10	-20
Northern Beaches	1,111	1,092	10	-19

 $^{^{19}}$ Denoting how they compare to other parts of Australia. $1^{\#}$ decile denoting lowest and 10 highest 20 Approximation based on SA1 averages





northern beaches

council

This chapter analyses a number of dwelling and household based measures and indicators related to local residents, pointing to historical and forecasted trends and insights

7.1 Dwellings and Occupancy Rates

Where are we now?

Most of the *Dwelling* growth on the Northern Beaches has followed similar trends to *Population* growth rates (see 6.1 Population). Hot spots of development have been in the suburbs of *Warriewood-Mona Vale, Dee Why-North Curl Curl* and *Narrabeen-Collaroy*.

TABLE 41: BROADER CATCHMENTS DWELLING TOTALS AND GROWTH RATES (2011-2016)

Geography	2011	2016	Growth	CAGR (5-yr %)
Mona Vale	23,408	24,600	1,192	5.09%
Terrey Hills	1,218	1,198	-20	-1.64%
Frenchs Forest	12,699	13,016	317	2.50%
Brookvale-Dee Why	35,951	37,520	1,569	4.36%
Manly	24,379	24,989	610	2.50%
Total	97,662	101,468	6,949	3.61%
Total	97,662	101,468	6,949	

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

Vacancy rates differ across the LGA with the largest percentages of *Occupied Private Dwellings* in the West section (most likely related to the larger number of family households). Lower ratios are in the suburb of *Manly-Fairlight* (hot spot for overseas migration and larger turnover of people) as well as *Mona Vale* broader catchment (in particular low rates in the suburb of *Avalon - Palm Beach* probably due to a high number of holiday rentals).

TABLE 42: BROADER CATCHMENTS OCCUPANCY RATES (2016)

Geography	Occupied private dwellings	Unoccupied private dwellings
Mona Vale	86.93%	13.07%
Terry Hills	93.74%	6.26%
Frenchs Forest	94.73%	5.27%
Brookvale-Dee Why	93.26%	6.74%
Manly	90.38%	9.62%





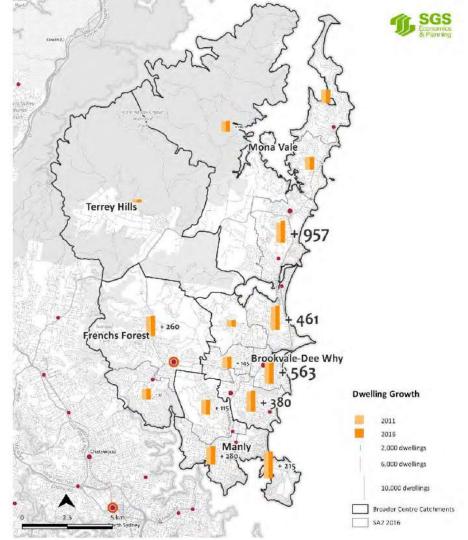


FIGURE 29: BROADER CATCHMENTS DWELLING GROWTH - MAP (2011-2016)





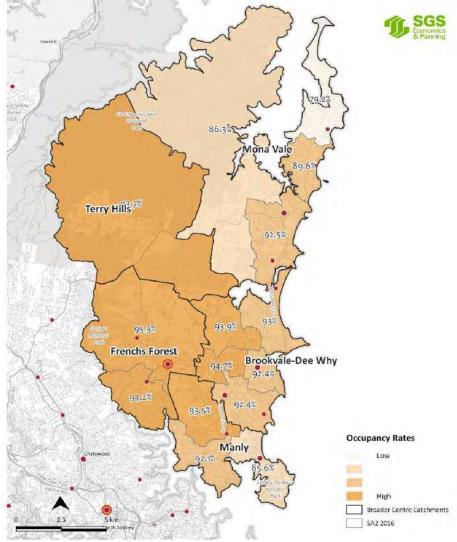


FIGURE 30: BROADER CATCHMENTS OCCUPANCY RATES - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

How are we different?

Northern Beaches has had similar five-year growth dwelling rates compared to the District but nearly twice as less compared to GS. The growth has occurred evenly across the five-year periods.

TABLE 43: COMPARATIVE DWELLING TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (5-yr %)
Greater Sydney	1,509,459	1,581,024	1,711,288	201,829	6.48%
North District	318,282	330,261	342,302	24,020	3.70%
Northern Beaches	94,519	97,662	101,468	6,949	3.61%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





Where are we going?

Northern Beaches is forecasted to grow at similar five-year growth rates compared to historical trends, and at slower rates in relation to the District and particularly GS. A total growth of +15,609 new dwellings is anticipated.

TABLE 44: COMPARATIVE FORECASTED DWELLING TOTALS AND GROWTH RATES (2021-2036)

Geography	2021	2026	2031	2036	Growth	CAGR (5-yr%)
Greater Sydney	1,952,909	2,151,081	2,356,444	2,583,639	630,730	9.78%
North District	379,422	402,505	427,926	455,138	75,716	6.25%
Northern Beaches	111,034	115,546	120,784	126,644	15,609	4.48%

Source: TfNSW - Travel Zone Projections 2016 (TZP16 v1.5)

7.2 Dwelling Type

Where are we now?

Northern Beaches is still dominated by *Separate Houses* but with a growing proportion of *Semi-Detached* dwellings and *Flat, Units or Apartments.* Especially high rates of *Separate Houses* are within the *Frenches Forest* and *Mona Vale* broader catchments.

Hot spots for Semi-Detached dwellings are the suburbs of Warriewood-Mona Vale and Balgowlah - Clontarf - Seaforth with the greatest proportion of Flat, Units or Apartments in the suburbs of Dee Why-North Curl Curl, Manly-Fairlight and moderate rates in Freshwater-Brookvale and Narrabeen - Collaroy

TABLE 45: BROADER CATCHMENTS DWELLING TYPE TOTALS (2016)

Geography	Separate house	Semi-detached	Flat, unit or apartment	Other
Mona Vale	17,275	2,527	4,377	303
Terrey Hills	1,098	25	19	40
Frenchs Forest	11,231	1,210	495	3
Brookvale-Dee Why	16,507	2,747	18,074	50
Manly	10,389	2,999	11,519	26
Total	56,537	9,548	34,541	438

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 46: BROADER CATCHMENTS DWELLING TYPE PROPORTIONS (2016)

Geography	Separate house	Semi-detached	Flat, unit or apartment	Other
Mona Vale	71%	10%	18%	1%
Terrey Hills	93%	2%	2%	3%
Frenchs Forest	87%	9%	4%	0%
Brookvale-Dee Why	44%	7%	48%	0%
Manly	42%	12%	46%	0%
Total	56%	<i>9</i> %	34%	0%





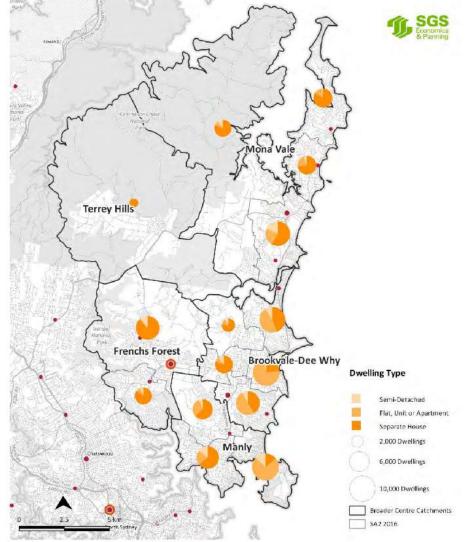


FIGURE 31: BROADER CATCHMENTS DWELLING STRUCTURE - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Overall, there has been a slight decrease in the number of *Separate Houses* and increases in the number of other types of dwellings. In particular, there has been a strong relative growth rate of *Semi-Detached* houses.

TABLE 47: LOCAL DWELLING TYPE TOTALS AND GROWTH RATES	(2006-2016)	8.

Geography	Separate house	Semi-detached	Flat, unit or apartment	Other
2016	56,537	9,548	34,541	438
2011	56,613	8,196	32,597	173
2006	56,945	6,729	30,466	341
Growth	-408	2,819	4,075	97
CAGR (5-yr %)	-0.36%	19.12%	6.48%	13.33%

Source: ABS Census 2016 (TableBuilder Pro)

ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

northern beaches council

Although there has been an overall growth in the number and proportion of *Semi-Detached* dwellings (better known as the "missing middle") especially in the suburbs of *Frenchs Forest* - *Belrose, Balgowlah* - *Clontarf* - *Seaforth* and *Warriewood-Mona Vale* certain areas have experienced a drop in their number and increase of *Separate Houses* - suburbs of *Avalon* - *Palm Beach* and *Newport-Bilgola*.

Geography	2011	2016	Growth
Balgowlah - Clontarf - Seaforth	767	1,165	398
Manly - Fairlight	1,332	1,459	127
Avalon - Palm Beach	590	108	-482
Bayview - Elanora Heights	138	458	320
Newport - Bilgola	551	306	-245
Warriewood - Mona Vale	1,282	1,655	373
Beacon Hill - Narraweena	401	533	132
Cromer	281	241	-40
Dee Why - North Curl Curl	393	352	-41
Forestville - Killarney Heights	141	290	149
Frenchs Forest - Belrose	507	920	413
Freshwater - Brookvale	774	686	-88
Manly Vale - Allambie Heights	207	375	168
Narrabeen - Collaroy	810	935	125
Terrey Hills - Duffys Forest	18	1,165	7
Northern Beaches	8,196	9,548	1,352

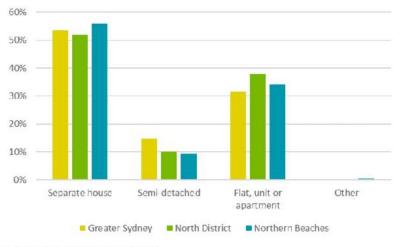
TABLE 48: SUBURB SEMI-DETACHED DWELLING TOTALS AND GROWTH RATES (2011-2016)

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

How are we different?

Northern Beaches overall, has a similar dwelling composition to the District and GS but with slightly larger proportions of *Separate Houses* and lower proportions of *Semi-Detached* dwellings.

FIGURE 32: COMPARATIVE DWELLING TYPE STRUCTURE (2016)



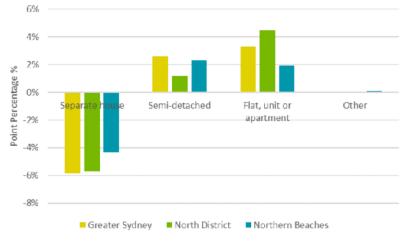
Source: ABS Census 2016 (TableBuilder Pro)





As with the previous graph, similar trends are present across all compared areas, with Northern Beaches having slightly lower growth trends in the proportion of *Separate Houses* (negative trends) and *Flat, Units or Apartments* (positive trends).

FIGURE 33: COMPARATIVE PROPORTIONAL CHANGE IN DWELLING TYPE STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





7.3 Family Household Composition

Where are we now?

At the broader catchment level, *Frenchs Forest* and *Terrey Hills* are predominately populated by *Couples with Children*, while *Brookvale-Dee Why* and *Manly* have larger proportions of *Lone Person* and *Group Households* - this is most likely related to a larger number of *Flat*, *Units or Apartments* in these area (leading to increased housing affordable) and better connectivity to the City - acting as major attractors for overseas migration (also often living in *Group Households*).

TABLE 49: BROADER CATCHMENTS FAMILY HOUSEHOLD TOTALS (2016)	
---	--

Geography	Couples only	Couples with children	Single parent	Lone person household	Group household
Mona Vale	5,561	8,052	1,722	4,066	962
Terrey Hills	285	537	73	129	56
Frenchs Forest	2,781	5,802	955	1,866	508
Brookvale-Dee Why	8,308	11,316	2,840	8,198	2,394
Manly	5,597	7,699	1,597	4,859	1,458
Total	22,468	33,442	7,202	19,132	5,698

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 50: BROADER CATCHMENTS FAMILY HOUSEHOLD PROPORTIONS (2016)

Geography	Couples only	Couples with children	Single parent	Lone person household	Group household
Mona Vale	27%	40%	8%	20%	5%
Terrey Hills	26%	50%	7%	12%	5%
Frenchs Forest	23%	49%	8%	16%	4%
Brookvale-Dee Why	25%	34%	9%	25%	7%
Manly	26%	36%	8%	23%	7%
Total	26%	38%	8%	22%	6%





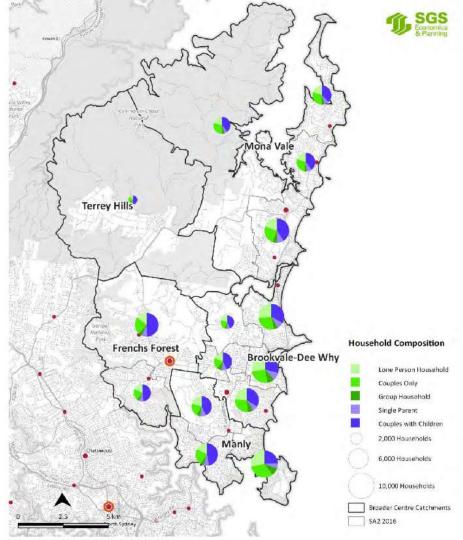


FIGURE 34: BROADER CATCHMENTS FAMILY HOUSEHOLD STRUCTURE - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Northern Beaches is primarily a family orientated LGA, with the local amenity and lifestyle acting as major attractors for these types of households. Both the highest totals and growth rates are in the *Couples with Children* category.

	TABLE 51: LOCAL	FAMILY HOUSEHOLD	TOTALS AND	GROWTH RATES	(2006-2016)
--	-----------------	------------------	------------	--------------	-------------

Year	Couples only	Couples with children	Single parent	Lo ne person ho usehold	Group household
2016	22,468	33,442	7,202	19,132	5,698
2011	22,457	31,215	7,202	19,278	5,402
Growth (Total)	11	2,227	-	-146	296
CAGR (5-yr %)	0.02%	3.44%	-	-0.38%	2.67%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





Looking at the family households residing in different types of dwellings, it becomes evident that regardless of the area, *Couple with Children* mostly reside it *Separate Houses*, with *Couples Only* being the second most prominent category in this type of dwelling.

TABLE 52: BROADER CATCHMENTS HOUSEHOLD TYPES IN SEPARATE HOUSES (2016)

Geography	Couples only	Couples with children	Single parent	Lone person household	Group household
Mona Vale	26.79%	46.57%	7.90%	12.99%	5.74%
Terrey Hills	26.21%	51.72%	6.88%	7.79%	7.39%
Frenchs Forest	22.89%	52.92%	8.08%	10.70%	5.40%
Brookvale-Dee Why	20.58%	51.41%	8.87%	11.68%	7.46%
Manly	20.95%	55.79%	7.81%	11.03%	4.42%
Total	23.03%	51.15%	8.19%	11.66%	5.97%

Source: ABS Census 2016 (TableBuilder Pro)

Semi-Detached dwellings are mostly composed of a mix of Lone Person Households, Couples with Children and Couples Only. The Frenchs Forest broader catchment has a particularly large proportion of Lone Person Households (potentially elderly people downsizing or living in retirement villages).

CATCHMENTS HOUSEHOLD	

Geography	Couples only	Couples with children	Single parent	Lone person household	Group household
Mona Vale	27.51%	28.21%	9.93%	31.47%	2.89%
Terrey Hills	34.48%	27.59%	10.34%	27.59%	0.00%
Frenchs Forest	25.10%	17.98%	6.92%	47.50%	2.50%
Brookvale-Dee Why	22.36%	26.24%	9.88%	36.24%	5.28%
Manly	27.34%	33.91%	8.13%	24.84%	5.78%
Total	25.68%	28.12%	8.96%	32.80%	4.43%

Source: ABS Census 2016 (TableBuilder Pro)

Family households residing in *Flat, Units or Apartments* are primarily *Lone Person Households* (especially in the *Frenchs Forest* broader catchment) and *Couples Only. Manly* also has a noticeably proportion of *Group Households* as well.

TABLE 54: BROADER CATCHMENTS HOUSEHOLD TYPES IN FLAT, UNITS OR APARTMENTS (2016)

Geography	Couples only	Couples with children	Single parent	Lone person household	Group household
Mona Vale	28.44%	16.90%	10.26%	40.60%	3.80%
Terrey Hills	21.05%	36.84%	0.00%	42.11%	0.00%
Frenchs Forest	22.80%	13.06%	5.94%	53.21%	4.99%
Brookvale-Dee Why	29.88%	18.90%	8.10%	35.39%	7.73%
Manly	31.33%	16.89%	7.00%	34.67%	10.12%
Total	30.05%	17.94%	7.98%	36.07%	7.96%

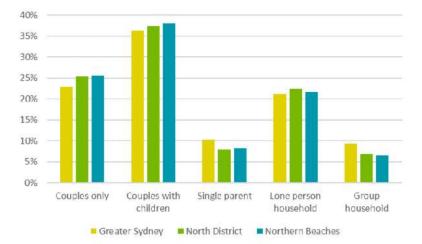




How are we different?

Compared to GS, Northern Beaches has a slightly larger proportion of *Couples with Children* as well as *Couples Only*, with lower rates of *Group Households* and *Single Parents*. When observed in relation to the North District, relatively similar trends are noted.

FIGURE 35: COMPARATIVE FAMILY HOUSEHOLD STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Considering proportional change, positive tendencies are noted in *Couples with Children* and *Group Households* in all compared areas and negative trends in *Lone Person Households* and *Couples Only* - likely related to housing affordability. If these trends continued, it could potentially lead to further social stratification in the housing market.

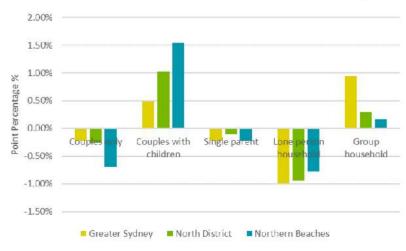


FIGURE 36: COMPARATIVE PROPORTIONAL CHANGE IN FAMILY HOUSEHOLD STRUCTURE (2006-2016)





7.4 Tenure Type

Where are we now?

Approximately two thirds of households on the Northern Beaches own a property (either *Outright* or *With a Mortgage*) while the remaining households predominantly *Rent*. High rates of *Outright*, as well as *Mortgage* based ownership are present within the *Frenchs Forest* and *Mona Vale* broader catchments. Expectedly the *Brookvale-Dee Why* and *Manly* broader catchments have higher proportion of rented properties.

TABLE FF.	DROADER CATCUNIENTS TENUISE TYPE TOTALS	2010)
TABLE 55:	BROADER CATCHMENTS TENURE TYPE TOTALS (2010)

Geography	Owned outright	Owned with a mortgage	Being purchased under a rent/buy scheme	Rented	Being occupied rent-free	Being occupied under a life tenure scheme	Other tenure type
Mona Vale	8,447	7,760	21	3,398	146	287	149
Terrey Hills	456	437	-	145	13	-	7
Frenchs Forest	5,115	4,998	11	1,452	70	136	52
Brookvale-Dee Why	9,634	11,297	32	10,492	213	427	225
Manly	6,903	6,770	13	6,945	158	88	71
Total	30,557	31,251	87	22,440	605	935	499

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 56: BROADER CATCHMENTS TENURE TYPE PROPORTIONS (2016	TABLE 56:	BROADER CATCHMENTS	TENURE TYPE PROPORTIONS (2	2016)
--	-----------	--------------------	----------------------------	-------

Geography	Owned outright	Owned with a mortgage	Being purchased under a rent/buy scheme	Rented	Being occupied rent-free	Being occupied under a life tenure scheme	Other tenure type
Mona Vale	42%	38%	0%	17%	1%	1%	1%
Terrey Hills	43%	41%	0%	14%	1%	0%	1%
Frenchs Forest	43%	42%	0%	12%	1%	1%	0%
Brookvale-Dee Why	30%	35%	0%	32%	1%	1%	1%
Manly	33%	32%	0%	33%	1%	0%	0%
Total	35%	36%	0%	26%	1%	1%	1%





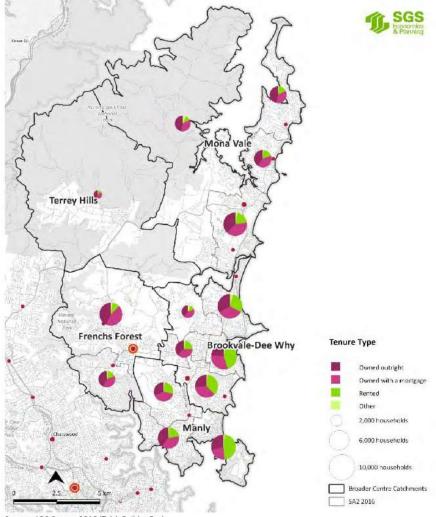


FIGURE 37: BROADER CATCHMENTS TENURE TYPE STRUCTURE - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

There is an increasing number of *Owned with a Mortgage* and *Rented* households. The increase in the number of *Rented* premises has been particularly high between 2006 and 2011.

	TABLE 57: LOCAL	TENURE TYPE	TOTALS AND	GROWTH RATES	(2006-2016)
--	-----------------	-------------	------------	--------------	-------------

Year	Owned outright	Owned with a mortgage	Being purchased under a rent/buy scheme	Rented	Being occupied rent-free	Being occupied under a life tenure scheme	Other tenure type
2016	30,557	31,251	87	22,440	605	935	499
2011	29,904	30,738	115	22,032	689	501	536
2006	29,962	27,357	88	20,769	642	532	393
Growth (Total)	595	3,894	-1	1,671	-37	403	106
CAGR (5-yr %)	0.99%	6.88%	-0.57%	3.95%	-2.92%	32.57%	12.68%

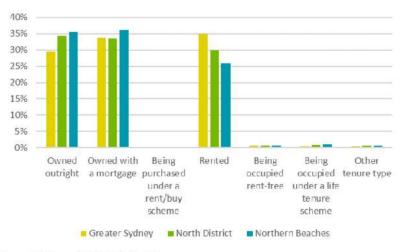
Source: ABS Census 2016 (TableBuilder Pro)



How are we different?

Overall, there is a higher ownership rate on the Northern Beaches compared to the District and particularly GS. The opposite holds true for the proportion of *Rented* premises.

FIGURE 38: COMPARATIVE TENURE TYPE STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

There is an increase, in particularly when compared to GS, in the proportion of *Owned with a Mortgage* household tenures on the Northern Beaches. The proportion of *Rented* premises has remained the same compared to GS and the District which have experienced an increase.

FIGURE 39: COMPARATIVE PROPORTIONAL CHANGE IN TENURE TYPE STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

7.5 Motor Vehicle Ownership

Where are we now?

Northern Beaches has a high car ownership rate overall, with the *Mona Vale* and *Frenchs Forest* broader catchments having large proportions of households with *Three* and *Four or*





more Motor Vehicles. Suburbs that have a smaller number of cars per household are Manly-Fairlight, Dee Why-North Curl Curl and Freshwater-Brookvale.

TABLE 58: BROADER CATCHMENTS CAR OWNERSHIP TOTALS (2016)

Geography	No motor vehicles	One motor vehicle	Two motor vehicles	Three motor vehicles	Four or more motor vehicles
Mona Vale	704	5,783	8,987	2,971	1,625
Terrey Hills	12	202	454	200	185
Frenchs Forest	385	3,161	5,531	1,732	885
Brookvale-Dee Why	2,652	12,996	11,876	3,127	1,621
Manly	2,109	8,959	7,310	1,786	695
Total	5,894	31,115	34,185	9,893	4,989

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 59: BROADER CATCHMENTS CAR OWNERSHIP PROPORTIONS (2016)

Geography	No motor vehicles	One motor vehicle	Two motor vehicles	Three motor vehicles	Four or more motor vehicles
Mona Vale	4%	29%	45%	15%	8%
Terrey Hills	1%	19%	43%	19%	18%
Frenchs Forest	3%	27%	47%	15%	8%
Brookvale-Dee Why	8%	40%	37%	10%	5%
Manly	10%	43%	35%	9%	3%
Total	7%	36%	40%	11%	6%

Source: ABS Census 2016 (TableBuilder Pro)

Per household car ownership rates have increased at a suburb level - in average 4%. The highest increase has occurred in the suburbs of *Beacon Hill-Narraweena*, *Manly-Fairlight* and *Newport-Bilgola*. The average number of *Motor Vehicles* per household is about 1.7 cars.

TABLE 60:SUBURB	CAR OWNERSHIP PE	R HOUSEHOLD RATES	(2011-2016)

			5.2
Geography	2011	2016	Growth
Terrey Hills - Duffys Forest	2.08	2.18	5%
Frenchs Forest - Belrose	1.86	1.91	2%
Newport - Bilgola	1.76	1.88	7%
Avalon - Palm Beach	1.73	1.85	7%
Bayview - Elanora Heights	1.83	1.84	0%
Cromer	1.75	1.81	4%
Forestville - Killarney Heights	1.75	1.77	1%
Beacon Hill - Narraweena	1.63	1.76	8%
Warriewood - Mona Vale	1.72	1.75	2%
Balgowlah - Clontarf - Seaforth	1.59	1.63	3%
Manly Vale - Allambie Heights	1.51	1.60	6%
Narrabeen - Collaroy	1.52	1.56	3%
Freshwater - Brookvale	1.38	1.47	6%
Dee Why - North Curl Curl	1.27	1.30	2%
Manly - Fairlight	1.06	1.15	8%

Source: ABS Census 2011 and 2016 (TableBuilder Pro)





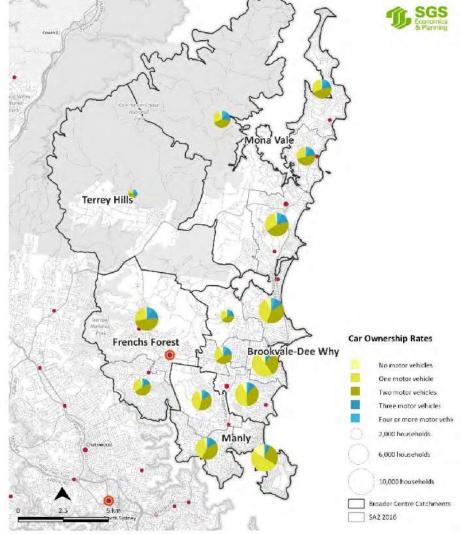


FIGURE 40: BROADER CATCHMENTS CAR OWNERSHIP STRUCTURE - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

In total, there has been an increase of households with *Three* and *Four or more Motor Vehicles* on the Northern Beaches, with an overall decline in the number of households with *No* or *One Motor Vehicle*.

TABLE 61: LOCAL CAR OWNERSHIP TOTALS AND GROWTH RATES (2006-2016)

Year	No motor vehicles	One motor vehicle	Two motor vehicles	Three motor vehicles	Four or more motor vehicles
2016	5,894	31,115	34,185	9,893	4,989
2011	6,824	31,785	33,525	8,411	3,745
2006	7,374	29,799	31,193	7,566	3,212
Growth (Total)	-930	-670	660	1,482	1,244
CAGR (5-yr %)	-10.60%	2.18%	4.69%	14.35%	24.63%

Source: ABS Census 2016 (TableBuilder Pro)



There might a number of reasons for this increase:

- If assuming the overall household composition between 2011 and 2016 has stayed relatively similar, this trend is potentially pointing to larger ownership rates as a result of preference
- A larger number of group households
- An increase of population aged 17+ in more established suburbs, leading to higher car rates - i.e. Young Adults purchasing cars once reaching certain legal age

How are we different?

Overall, levels of car ownership are similar across the District and GS, with Northern Beaches having a larger proportion of households with *Two Motor Vehicles* and a lower proportion of those with *No* or *One Motor Vehicle*.

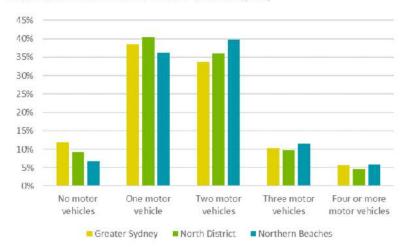
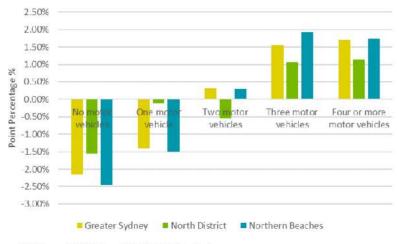


FIGURE 41: COMPARATIVE CAR OWNERSHIP STRUCTURE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

There is a trend towards an increase of the number of *Motor Vehicles* per household across all compared areas. Northern Beaches has similar trends with slightly stronger growth rates compared to the District.

FIGURE 42: COMPARATIVE PROPORTIONAL CHANGE IN CAR OWNERSHIP STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



Northern Beaches - Demographic Analysis

69



8. JOBS AND SKILLS (RESIDENTS)

This chapter analyses a number of employment based measures and indicators related to local residents, pointing to historical and forecasted trends and insights

8.1 Labour Force Status (PUR)

Where are we now?

The two most prominent groups in the labour force of Northern Beaches are *Employed Full-Time* and *Not in the Labour Force*²¹. The overall unemployment level is low. Areas with larger numbers of full-time employees are located in the suburbs of *Manly-Fairlight, Freshwater-Brookvale* and *Dee Why-North Curl Curl* which at the same time represent areas with higher proportions of *Young Adults, Adults* and *Overseas* migration.

Likewise, higher number of people Not in the Labour Force are in the suburbs of Bayview-Elenora Heights, Forestville-Killarney Heights and Avalon-Palm Beach that also represent areas of larger numbers of Retirees and Children.

Geography	Employed, worked full- time	Employed, worked part- time	Employed, away from work	Unemployed, looking for full-time work	Unemployed, looking for part-time work	Not in the labour force
Mona Vale	17,667	11,120	1,338	468	533	14,896
Terrey Hills	1,035	681	82	27	33	913
Frenchs Forest	10,898	6,430	757	339	397	9,788
Brookvale-Dee Why	31,756	15,008	2,188	793	765	19,732
Manly	19,872	9,361	1,313	538	596	12,233
Total	81,285	42,658	5,736	2,201	2,437	57,544

TABLE 62: BROADER CATCHMENTS LABOUR FORCE TOTALS (2016)

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 63: BROADER CATCHMENTS LABOUR FORCE PROPORTIONS (2016)

Geography	Employed, worked full- time	Employed, worked part- time	Employed, away from work	Unemployed, looking for full-time work	Unemployed, looking for part-time work	Not in the labour force
Mona Vale	38%	24%	3%	1%	1%	32%
Terrey Hills	37%	25%	3%	1%	1%	33%
Frenchs Forest	38%	22%	3%	1%	1%	34%
Brookvale-Dee Why	45%	21%	3%	1%	1%	28%
Manly	45%	21%	3%	1%	1%	28%
Total	42%	22%	3%	1%	1%	30%

Source: ABS Census 2016 (TableBuilder Pro)

 $^{21}\,\text{Not}$ in the Labour Force encompasses persons aged 15 years and over that are:

Not employed and not wanting to work

Not employed and wanting to work but not available to start working in reference week



Northern Beaches - Demographic Analysis

=



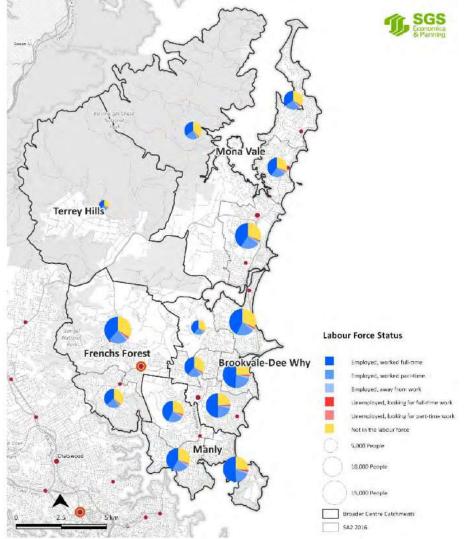


FIGURE 43: BROADER CATCHMENTS LABOUR FORCE STRUCTURE - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Overall, there has been an increase in the number of part time workers in the labour force (which follows nation-wide trends), both those already employed and those looking for work.

TABLE 64: LOCAL LABOUR FORCE TOTALS AND GROWTH	RATES	(2006-2016)
--	-------	-------------

Year	Employed, worked full- time	Employed, worked part- time	Employed, away from work	Unemployed, looking for full- time work	Unemployed, looking for part-time work	Not in the labour force
2016	81,285	42,658	5,736	2,201	2,437	57,544
2011	76,843	38,300	6,491	2,322	2,094	55,548
2006	73,630	34,996	6,742	1,716	1,491	51,894
Growth	7,655	7,662	-1,006	485	946	5,650
CAGR (5-yr %)	5.07%	10.41%	-7.76%	13.25%	27.85%	5.30%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

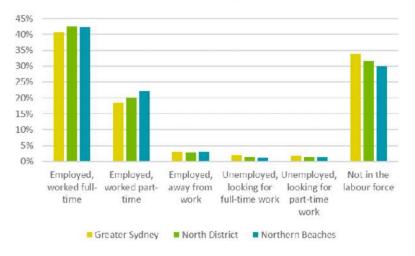




How are we different?

Compared to the District and GS, Northern Beaches has a slightly lower proportion of people Not in the Labour Force and higher proportion of people Employed, Worked Part-Time.

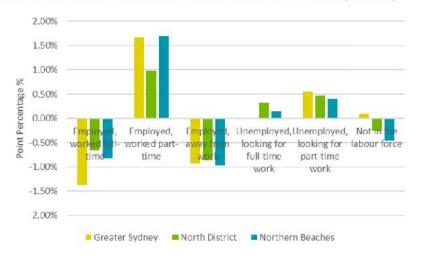
FIGURE 44: COMPARATIVE LABOUR FORCE STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

There is a further increase in the ratio of part time workers across the District and GS, as in the Northern Beaches, with a slight decline in all other categories and relative stagnation in *Unemployed, Looking for Full-Time Work*.

FIGURE 45: COMPARATIVE PROPORTIONAL CHANGE IN LABOUR FORCE STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





8.2 Industry of Employment (PUR)

Where are we now?

The largest number of people living on the Northern Beaches are employed within the *Knowledge Intensive* and *Population Serving* sector. The proportion of residents employed in the *Knowledge Intensive* industries is particularly high in the *Manly* centre catchment, suburbs of *Manly-Fairlight* and *Balgowlah - Clontarf - Seaforth* and *Manly Vale - Allambie Heights* to a lower extent. Other areas with higher proportions of *Knowledge Intensive* workers are also *Forestville - Killarney Heights* and *Frenchs Forest - Belrose*.

People working in the *Population Serving* sector are relatively evenly distributed across the various suburbs, but particularly concentrated along the Dee Why to Palm Beach corridor. The suburb, with the most diverse mix of employed residents in the four BIC is *Warriewood - Mona Vale*.

TABLE 65: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (PUR) TOTALS (2016)

Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Mona Vale	8,895	6,030	9,524	3,967
Terrey Hills	523	325	567	254
Frenchs Forest	6,158	3,704	5,161	2,130
Brookvale-Dee Why	15,092	9,414	15,531	6,211
Manly	13,144	5,426	7,713	2,995
Total	43,939	24,962	38,569	15,999

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 66: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (PUR) PROPORTIONS (2016)

Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Mona Vale	31%	21%	34%	14%
Terrey Hills	31%	19%	34%	15%
Frenchs Forest	36%	22%	30%	12%
Brookvale-Dee Why	33%	20%	34%	13%
Manly	45%	19%	26%	10%
Total	36%	20%	31%	13%





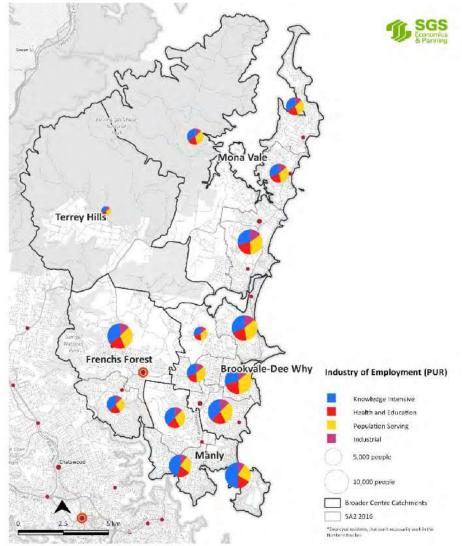


FIGURE 46: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (PUR) - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

As mentioned previously, there has been a further increase in the number of people employed within the *Knowledge Intensive* but also in the *Health and Education* and *Population Serving* sector, while there is a decline in the *Industrial* group.

Year	Knowledge Intensive	Health and Education	Population Serving	Industrial
2016	43,939	24,962	38,569	15,999
2011	41,476	21,694	35,333	20,280
2006	37,904	19,220	34,466	20,779
Growth	6,035	5,742	4,103	-4,780
CAGR (5-yr %)	7.67%	13.96%	5.78%	-12.25%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

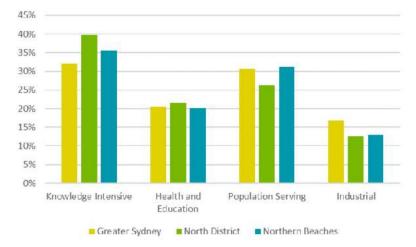




How are we different?

Northern Beaches has a slightly higher proportion of people working in the *Population Serving* industries compared to GS and particularly to the District. Meanwhile the District has a noticeable greater proportion of residents employed in the *Knowledge Intensive* group, while GS is more inclined to the *Industrial* category than the other two areas.

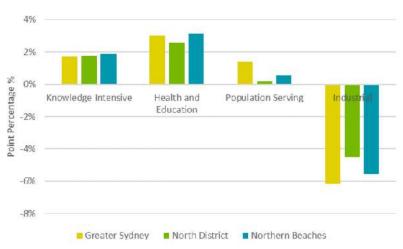
FIGURE 47: COMPARATIVE INDUSTRY OF EMPLOYMENT (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

There have been similar trends across all compared areas with a drop of people employed within the *Industrial* sector and increasing proportions of workers in the *Health and Education* and *Knowledge Intensive* categories.

FIGURE 48: COMPARATIVE PROPORTIONAL CHANGE IN INDUSTRY OF EMPLOYMENT (PUR) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





8.3 Occupation (PUR)

Where are we now?

The most common occupations amongst Northern Beaches residents are in the *Professionals*, and *Managers* categories. High ratios of these residents are located in the suburbs of *Manly-Fairlight*, *Balgowlah-Clontarf-Seaforth*, with higher rates elsewhere in the LGA as well (e.g. *Frenchs Forest* broader catchment, *Brookvale-Freshwater*)

Areas such as *Beacon Hill-Narraweena* and *Dee Why-North Curl Curl* have higher ratios of industrial workers (*Technicians and Trades Workers, Labourers* and *Machinery Operators and Drivers*) while suburbs with major retail outlets have larger numbers of *Sales Workers* (*Warriewood-Mona Vale* and *Freshwater-Brookvale*).

TABLE 68: BROADER CATCHMENTS OCCUPATION (PUR) TOTALS (2016)

Geography	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrativ e Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Mona Vale	5,628	8,046	3,852	2,869	4,167	2,839	786	1,465
Terrey Hills	354	436	262	155	267	149	47	108
Frenchs Forest	3,513	5,357	1,752	1,553	2,624	1,719	453	815
Brookvale-Dee Why	8,018	12,504	6,437	5,066	6,751	4,533	1,752	3,144
Manly	6,557	10,747	2,404	2,588	3,677	2,558	522	1,093
Total	24,080	37,085	14,707	12,241	17,482	11,801	3,557	6,621

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 69: BROADER CATCHMENTS OCCUPATION (PUR) TOTALS (2016)

Geography	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrativ e Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Mona Vale	19%	27%	13%	10%	14%	10%	3%	5%
Terrey Hills	20%	25%	15%	9%	15%	8%	3%	6%
Frenchs Forest	20%	30%	10%	9%	15%	10%	3%	5%
Brookvale-Dee Why	17%	26%	13%	11%	14%	9%	4%	7%
Manly	22%	36%	8%	9%	12%	8%	2%	4%
Total	19%	29%	12%	10%	14%	9%	3%	5%



The largest increase has occurred in the *Professionals, Managers* and *Community and Personal Service Workers* occupations. All other occupations have either remained relatively stagnant or experienced a decline, in particular the *Clerical and Administrative Workers* group.

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers	Machinery Operators and Drivers	Labourers
2016	24,080	37,085	14,707	12,241	17,482	11,801	3,557	6,621
2011	21,075	34,207	14,461	10,702	18,191	11,352	3,516	6,148
2006	19,403	30,720	14,235	9,470	18,137	11,391	3,629	6,589
Growth (Total)	4,677	6,365	472	2,771	-655	410	-72	32
CAGR (5-yr %)	11.40%	9.87%	1.64%	13.69%	-1.82%	1.78%	-1.00%	0.24%

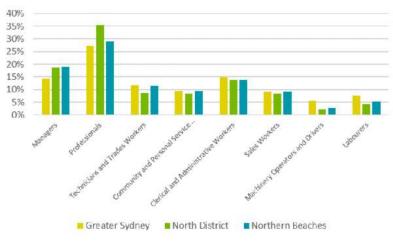
TABLE 70: LOCAL OCCUPATION (PUR) TOTALS AND GROWTH RATES (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

How are we different?

Northern Beaches has a relatively similar occupation structure to the District and GS, but with a noticeably lesser proportion of *Professionals* compared to the District and higher levels of *Managers* compared to GS.

FIGURE 49: COMPARATIVE OCCUPATION (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Major structural trends have also been similar to the District and GS, with slightly less pronounced growths in the *Professional* group but higher rates in the proportion of *Managers*.





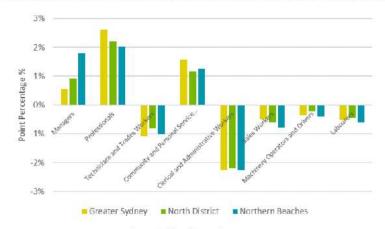


FIGURE 50: COMPARATIVE PROPORTIONAL CHANGE IN OCCUPATION (PUR) STRUCTURE (2006-2016)

8.4 Place and Method of Travel to Work (PUR)

Where are we now?

Most of Northern Beaches residents use *Vehicles* to commute to work. The combined number of all other modes represents only about of 50% of the *Vehicles* total with *Public Transport* being the second most used mode.

The use of *Vehicles* is particularly high with residents of the *Mona Vale* broader catchment but also in the suburb of *Cromer. Public Transport* has high utilisation rates in *Manly-Fairlight*, as do *Active Transport* options. The broader catchments of *Manly* and *Brookvale-Dee Why* having generally higher proportions of *Public Transport* use.

TABLE 71: BROADER CATCHMENTS METHOD OF TRAVEL TO WORK (PUR) TOTALS (2016)

Geography	Public transport	Vehicle	Active transport	Other Mode	Worked at home
Mona Vale	2,788	20,418	1,070	198	2,942
Terrey Hills	152	1,233	61	8	180
Frenchs Forest	2,822	11,682	442	87	1,277
Brookvale-Dee Why	8,899	30,764	2,140	242	2,589
Manly	8,870	14,639	1,970	168	2,269
Total	23,530	78,736	5,693	701	9,257

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 72: BROADER CATCHMENTS METHOD OF TRAVEL TO WORK (PUR) PROPORTIONS (2016)

Geography	Public transport	Vehicle	Active transport	Other Mode	Worked at home
Mona Vale	10%	74%	4%	1%	11%
Terrey Hills	9%	75%	4%	0%	11%
Frenchs Forest	17%	72%	3%	1%	8%
Brookvale-Dee Why	20%	69%	5%	1%	6%
Manly	32%	52%	7%	1%	8%
Total	20%	67%	5%	1%	8%

Source: ABS Census 2016 (TableBuilder Pro)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



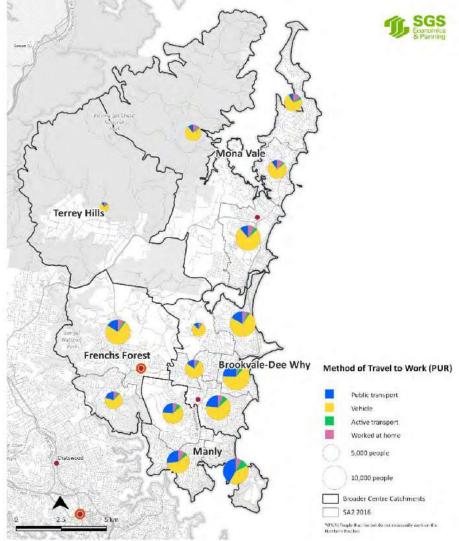


FIGURE 51: BROADER CATCHMENTS METHOD OF TRAVEL TO WORK (PUR) - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Historically, there has been an increase in the number of people commuting to work with *Public Transport* and *Vehicles* but also of those that *Worked from Home*, with the highest growth trends present in the use of *Public Transport*.

TABLE 73: LOCAL METHOD OF TRAVE	L TO WORK (PUR)	TOTALS AND GROWTH RATES	(2006-2016)
---------------------------------	-----------------	-------------------------	-------------

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home
2016	23,530	78,736	5,693	701	9,257
2011	19,804	75,356	5,366	632	7,910
2006	16,879	72,158	5,027	500	6,965
Growth	6,651	6,578	666	201	2,292
CAGR (5-yr %)	18.07%	4.46%	6.42%	18.41%	15.29%

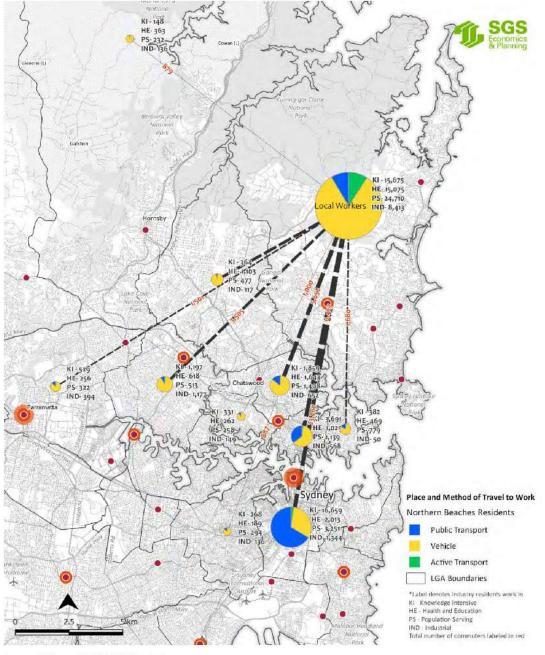
Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



The most popular working destinations for residents of the Northern Beaches are the LGAs of *Sydney, North Sydney* and *Willoughby*. However, the largest number of people are employed locally - 54% self-containment rate.

The vast majority of workers use *Vehicles* to reach their employment destination, in particular LGAs West of Northern Beaches (*Ku-ring-gai, Ryde, Parramatta* and *Chatswood*) but also local workers. Higher rates of *Public Transport* utilisation are with commuters travelling to *Sydney* and to some degree *North Sydney*.

FIGURE 52: PLACE AND METHOD OF TRAVEL TO WORK (PUR) OF LOCAL WORKERS - MAP (2016)



Source: ABS Census 2016 (TableBuilder Pro)

SGS Northern Beaches - Demographic Analysis

80



FIGURE 53: TOP EMPLOYMENT LOCATIONS FOR LOCAL RESIDENTS (2016)

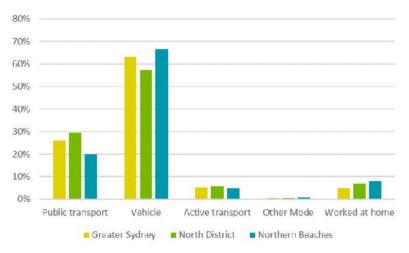
Geography (POW)	2016	%
Northern Beaches	67,575	54.16%
Sydney	24,153	19.36%
North Sydney	6,681	5.35%
Willoughby	5,905	4.73%
No Fixed Address	5,763	4.62%
Ryde	3,658	2.93%
Ku-ring-gai	2,126	1.70%
Mosman	1,733	1.39%
Parramatta	1,568	1.26%
Botany Bay	1,095	0.88%
1000 0010/7		

Source: ABS Census 2016 (TableBuilder Pro)

How are we different?

Although high Vehicle usage rates are existing in all three compared areas, Northern Beaches has a higher proportion, in particular compared to the District and noticeably lower rates of *Public Transport* utilisation.

FIGURE 54: COMPARATIVE METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2016)







Trends are showing a positive shift towards higher rates of *Public Transport* use and a decrease in the proportion of people using *Vehicles*, with less pronounced trends in these categories on the Northern Beaches compared to the District and GS area.

FIGURE 55: COMPARATIVE PROPORTIONAL CHANGE IN METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





9. JOBS AND SKILLS (WORKERS)

This chapter analyses a number of employment based measures and indicators related to local workers, pointing to historical and forecasted trends and insights.

Note: *Totals* in Broader Catchments tables are NOT the sum of the Broader Catchments but totals from LGA tables. As ABS has introduced a new imputation method in 2016, for assigning workplace destination (Destination Zones) to persons that provided partial or no information about their place of work, different imputations are applied to different geographies as well. LGA totals will not match sums of lower level geographies (e.g. SA2). Hence LGA totals have been used in both tables for consistency.

9.1 Employment (POW)

Where are we now?

An additional +5,993 jobs have been generated on the Northern Beaches between the two Census periods, with the *Manly* broader catchment having the highest growth rates. The major employment area is the *Brookvale-Dee Why* catchment.

Geography	2011	2016	Growth	CAGR (5-yr %)
Mona Vale	16,901	18,693	1,792	10.60%
Terrey Hills	1,854	2,028	174	9.39%
Frenchs Forest	13,844	14,757	913	6.59%
Brookvale-Dee Why	25,020	27,492	2,472	9.88%
Manly	12,563	15,052	2,489	19.81%
Total	76,715	82,708	5,993	7.81%

TABLE 74: BROADER CATCHMENTS EMPLOYMENT TOTALS AND GROWTH RATES (2011-2016)

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

How are we different?

Growth rates on the Northern Beaches have been similar to general trends at the GS level and slightly higher compared to the North District averages. Most of growth has occurred in the past five years, which is expected due to the GFC taking place in the 2006-2011 period.

TABLE 75: COMPARATIVE EMPLOYMENT TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (5-yr %)
Greater Sydney	1,644,686	1,745,269	1,944,153	299,467	8.72%
North District	337,465	357,218	378,953	41,488	5.97%
Northern Beaches	72,802	76,715	82,708	9,906	6.59%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Where are we going?

Northern Beaches is forecasted to accommodate an additional +4,75% jobs each five years, which represents a lower growth rate compared to historical trends but also the District/GS.





TABLE 76: COMPARATIVE FORECASTED EMPLOYMENT TOTALS AND GROWTH RATES (2021-2036)

Geography	2021	2026	2031	2036	Growth	CAGR (5-yr%)
Greater Sydney	2,712,085	2,929,335	3,154,622	3,389,594	677,508	7.72%
North District	512,368	536,319	563,975	595,151	82,782	5.12%
Northern Beaches	110,618	114,192	120,026	127,155	16,537	4.75%

Source: TfNSW - Travel Zone Projections 2016 (TZP16 v1.5)

9.2 Industry of Employment (POW)

Where are we now?

The major employment centres on the Northern Beaches are the suburbs of *Freshwater-Brookvale* (Warringah Mall and industrial zones), *Frenchs Forest-Belrose* (business park) and *Warriewood-Mona Vale* (mixed-use and industrial zones).

Apart from being the major employment hubs, *Frenchs Forest-Belrose* and *Warriewood-Mona Vale* also have the most diverse mix of industries while the suburbs with higher proportions of *Knowledge Intensive* jobs are *Dee Why-North Curl Curl* and *Manly-Fairlight*. The major *Population Serving* centre is *Freshwater-Brookvale* with a number of smaller local centres also being inclined towards *Population Serving* industries.

TABLE 77: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (POW) TOTALS (2016)

Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Mona Vale	4,317	4,019	6,874	2,611
Terrey Hills	243	494	714	489
Frenchs Forest	3,209	3,172	4,508	3,172
Brookvale-Dee Why	6,147	5,289	10,446	4,527
Manly	3,889	4,646	5,276	705
Total	18,618	18,526	30,021	12,051

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 78: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (POW) PROPORTIONS (2016)

Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Mona Vale	24%	23%	39%	15%
Terrey Hills	13%	25%	37%	25%
Frenchs Forest	23%	23%	32%	23%
Brookvale-Dee Why	23%	20%	40%	17%
Manly	27%	32%	36%	5%
Total	24%	23%	38%	15%

Source: ABS Census 2016 (TableBuilder Pro)





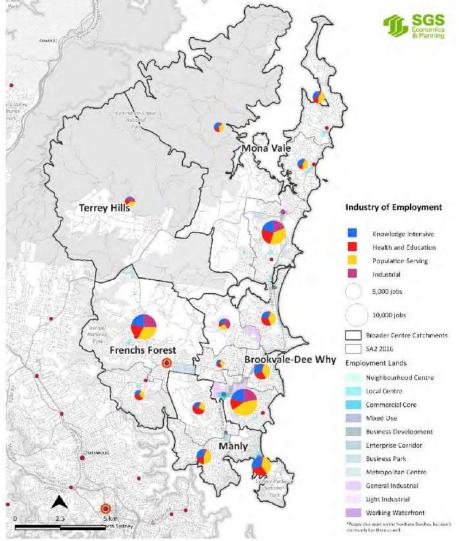


FIGURE 56: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (POW) - MAP (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Overall, Northern Beaches is a *Population Serving* inclined market, with strong growth trends in *Health and Education* industries as well. The *Industrial* category is experiencing a decline in job numbers, as it is in a number of other LGAs in Sydney.

TABLE 79: LOCAL INDUSTRY OF EMPLOYMENT (POW) TOTALS AND GROWTH RATES (2006-2016)

Year	Knowledge Intensive	Health and Education	Population Serving	Industrial
2016	43,939	24,962	38,569	15,999
2011	41,476	21,694	35,333	20,280
2006	37,904	19,220	34,466	20,779
Growth	6,035	5,742	4,103	-4,780
CAGR (5-yr %)	7.67%	13.96%	5.78%	-12.25%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

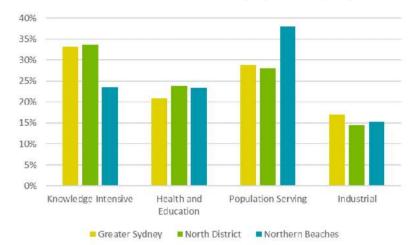




How are we different?

Compared to the District and GS, Northern Beaches has a noticeable larger proportion of *Population Serving* jobs and smaller ratio of *Knowledge Intensive* industries, with the other two categories at similar levels.

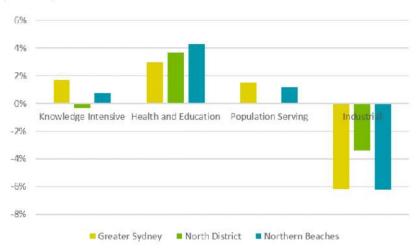
FIGURE 57: COMPARATIVE INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Northern Beaches has been experiencing a stronger increase in the number of *Health and Education* jobs than the District and GS, with a declining *Industrial* portion of jobs, at similar levels to GS.

FIGURE 58: COMPARATIVE PROPORTIONAL CHANGE IN INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





9.3 Occupation (POW)

Where are we now?

The most common occupations amongst workers on the Northern Beaches are *Professionals* and *Managers*. Large numbers of these occupations are located in the suburbs of *Frenchs Forest-Belrose, Warriewood-Mona Vale, Freshwater-Brookvale* and *Manly-Fairlight*. The main hotpot for *Sales Workers* is *Freshwater-Brookvale*, but also for *Clerical and Administrative Workers* and *Technicians and Trades Workers* creating a dynamic and diverse emp. area.

TABLE 80: BROADER CATCHMENTS OCCUPATION (POW) TOTALS (2016)

Geography	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrativ e Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Mona Vale	3,042	4,901	3,158	2,322	2,810	2,304	762	1,454
Terrey Hills	327	437	454	301	243	128	225	242
Frenchs Forest	2,706	4,614	1,667	1,591	2,520	1,526	655	984
Brookvale-Dee Why	4,361	6,126	4,601	3,379	4,183	3,813	1,703	2,284
Manly	2,354	4,858	1,902	2,711	1,873	1,809	293	1,152
Total	12,225	20,013	10,817	9,568	11,223	9,093	3,404	5,597

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 81: BROADER CATCHMENTS OCCUPATION (POW) PROPORTIONS (2016)

Geography	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrativ e Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Mona Vale	15%	24%	15%	11%	14%	11%	4%	7%
Terrey Hills	14%	19%	19%	13%	10%	5%	10%	10%
Frenchs Forest	17%	28%	10%	10%	15%	9%	4%	6%
Brookvale-Dee Why	14%	20%	15%	11%	14%	13%	6%	8%
Manly	14%	29%	11%	16%	11%	11%	2%	7%
Total	15%	24%	13%	12%	14%	11%	4%	7%

Source: ABS Census 2016 (TableBuilder Pro)

Historically, there have been large growth trends in the *Professionals, Community and Personal Service Workers,* but also growth in the *Mangers* and *Technicians and Trades Workers* related occupations. All other occupations have either remained stagnant or experienced a decline, such as the *Clerical and Administrative Workers* group.

TABLE 82: LOCAL OCCUPATION (POW) TOTALS AND GROWTH RATES (2006-2016)

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers	Machinery Operators and Drivers	Labourers
2016	12,225	20,013	10,817	9,568	11,223	9,093	3,404	5,597
2011	11,212	18,090	10,113	7,867	11,733	8,810	3,239	4,898
2006	10,976	16,052	9,762	6,576	11,524	8,810	3,145	5,221
Growth (Total)	1,249	3,961	1,055	2,992	-301	283	259	376
CAGR (5-yr %)	5.54%	11.66%	5.27%	20.62%	-1.31%	1.59%	4.04%	3.54%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

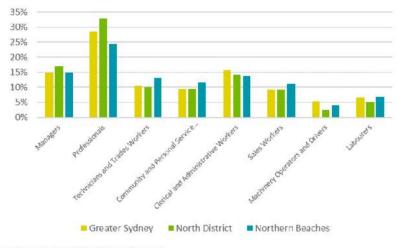




How are we different?

Northern Beaches has a relatively similar occupation structure to the District and GS, but noticeably lesser proportion of *Professionals* and higher levels of *Technicians and Trades Workers, Community and Personal Service Workers* and *Sales Workers*.

FIGURE 59: COMPARATIVE OCCUPATION (POW) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Proportional growth trends have been similar to the District and GS as well, with slightly less pronounced growth in the *Professional* group and higher rates in the *Community and Personal Service Workers*.

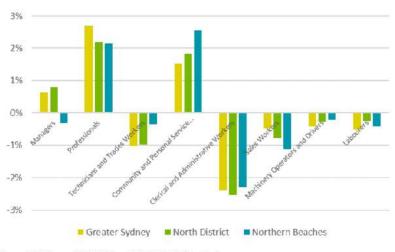


FIGURE 60: COMPARATIVE PROPORTIONAL CHANGE IN OCCUPATION (POW) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



9.4 Method of Travel to Work (POW)

Where are we now?

As most of Northern Beaches residents work locally, the findings of this chapter are somewhat similar to Place and Method of Travel to Work (PUR).

Most of the commuters (both within and outside of Northern Beaches) use *Vehicles* to travel to work in particularly to the *Frenchs Forest* broader catchment. Somewhat larger number of commuters use *Public Transport* and *Active Transport* to commute to the *Manly* broader catchment.

Geography	Public transport	Vehicle	Active transport	Other Mode	Worked at home
Mona Vale	1,279	14,019	988	158	2,634
Terrey Hills	100	1,853	51	3	157
Frenchs Forest	1,215	12,246	384	57	1,237
Brookvale-Dee Why	2,748	21,019	1,807	161	2,256
Manly	2,038	9,582	1,699	102	1,967
Total	6,850	55,104	4,673	458	7,591

TABLE 83: BROADER CATCHMENTS METHOD OF TRAVEL TO WORK (POW) TOTALS (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Geography	Public transport	Vehicle	Active transport	Other Mode	Worked at home
Mona Vale	7%	73%	5%	1%	14%
Terrey Hills	5%	86%	2%	0%	7%
Frenchs Forest	8%	81%	3%	0%	8%
Brookvale-Dee Why	10%	75%	6%	1%	8%
Manly	13%	62%	11%	1%	13%
Total	9%	74%	6%	1%	10%

TABLE 84: BROADER CATCHMENTS METHOD OF TRAVEL TO WORK (POW) PROPORTIONS (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Historically, there has been an increase in the number of people commuting to (or within) the Northern Beaches with *Vehicles* and a small growth trend in the number of people using *Public Transport*.

TABLE 85: LOCAL METHOD OF TRAVEL TO WORK (POW) TOTALS AND GROWTH RATES (2006-2016)

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home
2016	6,850	55,104	4,673	458	7,591
2011	5,591	51,521	4,361	338	7,037
2006	4,728	48,384	4,304	282	6,313
Growth	2,122	6,720	369	176	1,278
CAGR (5-yr %)	20.37%	6.72%	4.20%	27.44%	9.66%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



Northern Beaches - Demographic Analysis

89

northern beaches council

> As mentioned previously, most of the residents work locally (81.6%), creating a very selfsufficient²² economy. Other LGAs with significant number of workers commuting to the Northern Beaches, although similar in number are *Ku-ring-gai*, *Hornsby* and *North Sydney*.

FIGURE 61: ORIGIN OF WORKERS EMPLOYED ON THE NORTHERN BEACHES (2016)

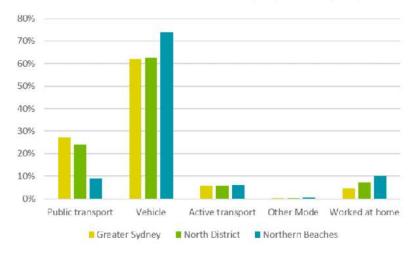
67,575	
01,010	81.60%
2,478	2.99%
1,853	2.24%
1,358	1.64%
1,272	1.54%
1,234	1.49%
1,058	1.28%
1,057	1.28%
960	1.16%
815	0.98%
	1,853 1,358 1,272 1,234 1,058 1,057 960

Source: ABS Census 2016 (TableBuilder Pro)

How are we different?

Compared to both the District and GS, the number of commuters using *Public Transport* to commute to the Northern Beaches is significantly lower, with higher ratios of *Vehicle* use.

FIGURE 62: COMPARATIVE METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

Similarly, historical trends are showing a lesser increase in the proportion of commuters using *Public Transport* and smaller drops in the use of *Vehicles* to both the District and GS.

²² Self-sufficiency looks at what proportion of local jobs are filled by local residents





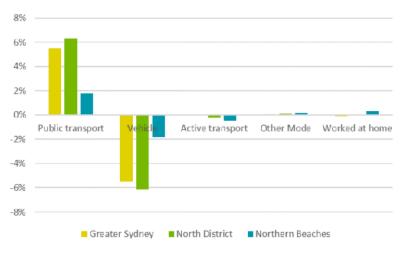


FIGURE 63: COMPARATIVE PROPORTIONAL CHANGE IN METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

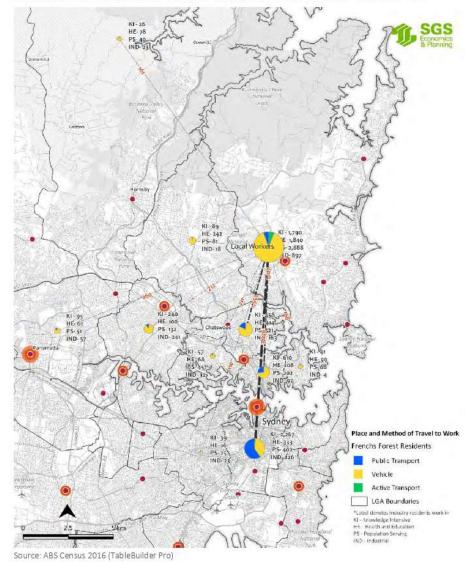




APPENDIX 1 – ADDITIONAL PLACE AND METHOD OF TRAVEL TO WORK (PUR) – MAPS (2016)

These maps denote working destinations for residents of the four major broader catchment centres on the Northern Beaches. Not to be confused with Place of Work (POW) maps, denoting origin of workers in section 5. Places and Connectivity.

FIGURE 64: PLACE AND METHOD OF TRAVEL TO WORK (PUR) OF FRENCHS FOREST RESIDENTS - MAP







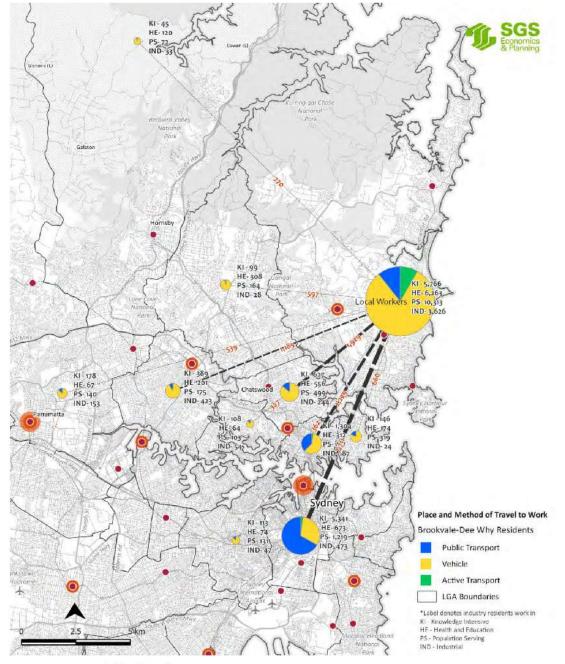


FIGURE 65: PLACE AND METHOD OF TRAVEL TO WORK (PUR) OF BROOKVALE-DEE WHY RESIDENTS - MAP

Source: ABS Census 2016 (TableBuilder Pro)





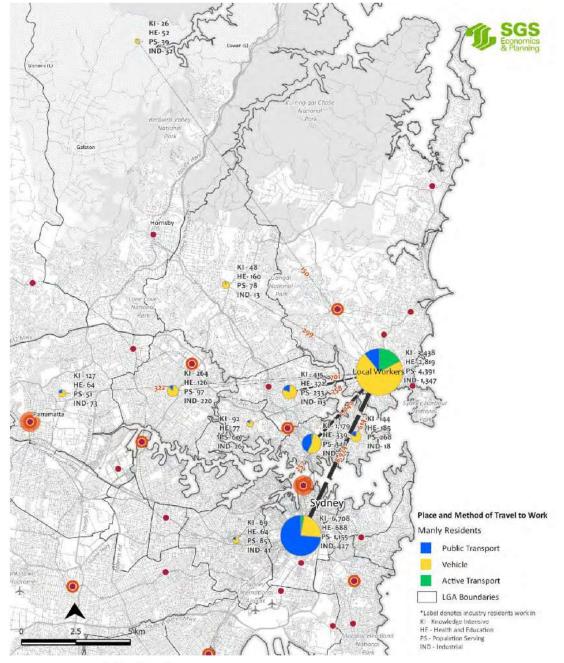


FIGURE 66: PLACE AND METHOD OF TRAVEL TO WORK (PUR) OF MANLY RESIDENTS - MAP

Source: ABS Census 2016 (TableBuilder Pro)





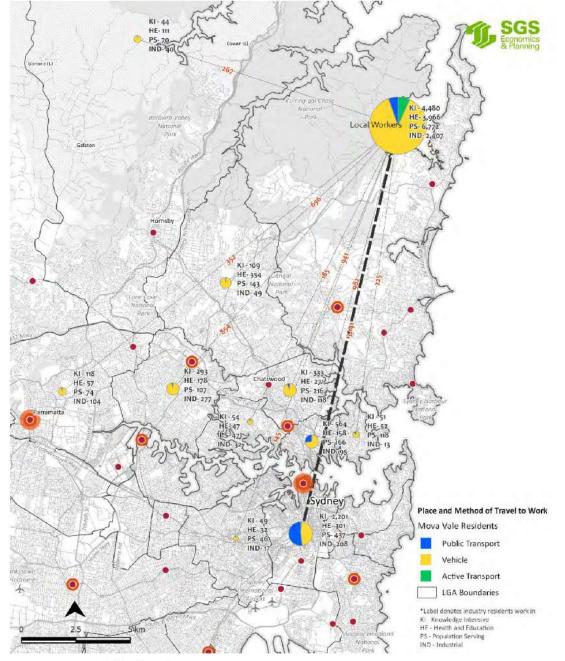


FIGURE 67: PLACE AND METHOD OF TRAVEL TO WORK (PUR) OF MONA VALE RESIDENTS - MAP

Source: ABS Census 2016 (TableBuilder Pro)



APPENDIX 2 – BROAD INDUSTRY CATEGORIES (BIC) DEFINITION

In conjunction with the Greater Sydney Commission (GSC), SGS Economics and Planning has categorised ANZSIC Divisions into four broad Industry Groups (also known as Broad Industry Categories – BIC). The following table illustrates the classification.

ANZSIC 2006 Division Code	ANZSIC 2006 Division Title	Group
J	Information Media and Telecommunications	Knowledge Intensive
К	Financial and Insurance Services	Knowledge Intensive
L	Rental, Hiring and Real Estate Services	Knowledge Intensive
Μ	Professional, Scientific and Technical Services	Knowledge Intensive
Ν	Administrative and Support Services	Knowledge Intensive
0	Public Administration and Safety	Knowledge Intensive
Р	Education and Training	Health and Education
Q	Health Care and Social Assistance	Health and Education
E	Construction	Population Serving
G	Retail Trade	Population Serving
н	Accommodation and Food Services	Population Serving
R	Arts and Recreation Services	Population Serving
S	Other Services	Population Serving
A	Agriculture, Forestry and Fishing	Industrial
В	Mining	Industrial
с	Manufacturing	Industrial
D	Electricity, Gas, Water and Waste Services	Industrial
F	Wholesale Trade	Industrial
I	Transport, Postal and Warehousing	Industrial

Source: ABS ANZSIC 2006 Support Tool, SGS Economics and Planning and GSC 2016



northern

beaches council



APPENDIX 3 – UNDERSTANDING DATA AND MEASURES

This report has used a variety of measures in order to better understand trends present in the data from a number of perspectives. Observing indicators from only one perspective can often be misleading. Each perspective (measure) tells a different story and gives a different outlook. This appendix is specifically devised to guide and assist you when analysing the data in this report and help you better understand the original intention of each measure.

Totals - Absolute Values (123)

Totals are the most common used measure for observing data. They are simple, easy to understand and point to straightforward facts. People love using them as they resonate strongly, especially when the numbers are high. For instance, based on the table below, we know we have a large number of people using *Vehicles* (88,789) to travel to work, hence we might end up with a lot of cars on the streets.

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	30,492	88,789	3,193	808	13,183
2011	24,432	81,467	3,043	628	12,240
2006	21,075	75,742	3,292	535	12,155
Growth (Total)	9,417	13,047	-99	273	1,028
Growth (CAGR %)	20.28%	8.27%	-1.52%	22.89%	4.14%

METHOD OF TRAVEL TO WORK (PUR) TOTALS AND GROWTH RATES (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

<u>Downside</u>: When we have a lot of (similar) values, it might become hard to notice what to pay attention to. Also, understanding how one number (category) compares to other numbers (categories) or sum totals (of all categories) might become hard. Expressing data as a ratio or proportion (%) usually helps us with this.

Proportions - Percentage of SUM Total (%)

Proportions, ratios of percentages (name them as you like) usually kick-in handy when trying to understand how something compares to other (sub) categories or SUM totals. This measure is also particularly useful when trying to set up targets.

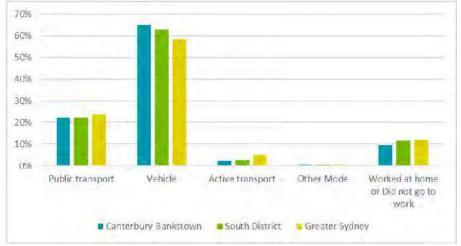
For instance, we can see that the value of *Vehicles* is quite different when comparing the local level of *Vehicle* usage (30,492) - table above; and the Metropolitan scale (x number of people use *Vehicles*). If someone asked us to put that in context and measure the RATE of *Vehicle* use, we couldn't really achieve it without using a relative measure. However, if expressed as a percentage of the sum total, we would know that the use of *Vehicles* is actually higher at the local level Metro level - see graph below.

Or, let's say our goal is to at least have 30% of people using Public Transport in the future. It makes much more "sense" to express that using proportions (%) than total numbers – e.g. our goal is to have 45,448 people using public transport. Also, the total might change, so 30% isn't 45,448 but a different value.





METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

<u>Downside</u>: By using percentages or ratios, we can often oversight the overall importance of something in real life terms. Although 2.34% (ratio of people using *Active Transport*) might seem low and negligible, planning for 3,193 cyclists is still quite important. The larger the grand total is, the bigger the chance for such an oversight is to occur.

Growth Totals - Absolute Values (+- 123)

Again, similar to totals, growth totals are good for understanding the overall impact of some sort of change. From 2006 to 2016, the number of people using *Vehicles* has increased by +13,047 meaning we have a large number of additional vehicles on the streets that we need to plan for. Also, we have an additional +9,417 people using *Public Transport* probably requiring additional services.

<u>Downside</u>: However, growth totals can often "hide" important structural changes that occur over a larger period of time. If we disregarded *Active Transport*, we can see that all modes of transport have experienced a growth between 2006 and 2016. It is easy to jump to a conclusion and say the fastest growing mode of transport is *Vehicles*. However, if we compared the PROPORTION of people using *Vehicles* in 2006 to 2016, we will that the opposite is actually true - see next heading.

Proportional Changes - Point Percentages (%)

Proportional changes are good in anticipating broader structural changes. This means, that if the current growth trends continued, even though the growth total of *Public Transport* (+9,147) is lower than that of *Vehicles* (+13,047), the number of people using *Public Transport* would eventually "catch up" in the overall proportion. If we translated the first table to proportions instead of totals, it would look something like this:



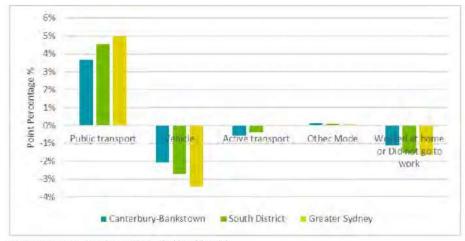


METHOD OF TRAVEL TO WORK (PUR) TOTALS AND GROWTH RATES (2006-2016)

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	22.3%	65.1%	2.3%	0.6%	9.7%
2011	20.1%	66.9%	2.5%	0.5%	10.0%
2006	18.7%	67.1%	2.9%	0.5%	10.8%
Growth (Total)	9,417	13,047	-99	273	1,028
Growth (CAGR %)	20.28%	8.27%	-1.52%	22.89%	4.14%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

This is simply because the initial "base value" was a lot smaller for *Public Transport* compared to *Vehicles*.



CHANGE IN METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2006-2016)

Growth Percentages - CAGR (%)

Relative growth is a measure good for understanding how much a value has changed over time and relative to itself, as well as comparing rates and trends of different geographic scales. In relative terms, the +9,417 increase of people using *Public Transport* represents a +20.28% increase, while the +13,047 represent a +8.27% compared to a previous value of those indicators.

<u>Downside</u>: However, what relative growth numbers don't "catch" is the base value itself. If looked in more detail the +22.89% of the use in *Active Transport* is higher than both previously mentioned modes, but it only represents an additional +273 commuters.

Note: There is a lot of other things to keep in mind when analysing data and using descriptive statistics to measure performance. Only a small part of it has been mentioned in this appendix. We recommend to observe indicators from a variety of perspectives and angles prior to making any conclusions.



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



APPENDIX 4 – GLOSSARY

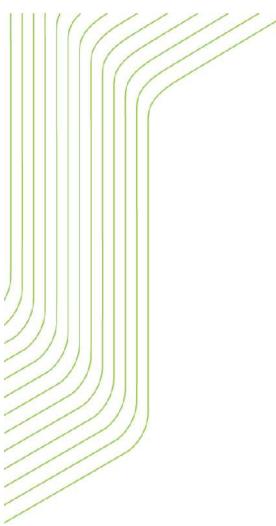
This appendix contains a glossary of commonly used acronyms through the report.

- ABS Australian Bureau of Statistics
- ANZSIC Australian and New Zealand Standard Industrial Classification
- ASCO Australian Standard Classification of Occupations
- BIC Broad Industry Category
- CAGR (%) Compounded Annual Growth Rate
- District North District
- DPE Department of Planning and Environment
- GFC Global Financial Crisis
- GSRP Greater Sydney Region Plan
- GS Greater Sydney
- GSC Greater Sydney Commission
- LEP Local Environmental Plans
- LGA Local Government Area
- LSPS Local Strategic Planning Statement
- POW Place of Work
- PP (%) Point Percentage
- PUR Place of Work
- SA2 Statistical Areas Level 2
- TPA Transport Performance and Analytics
- VET Vocational Education and Training





ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019





Contact us

CANBERRA Level 2, 28-36 Ainslie Place Canberra ACT 2601 +61 2 6257 4525 sgsact@sgsep.com.au

HOBART PO Box 123 Franklin TAS 7113 +61 421 372 940 sgstas@sgsep.com.au

MELBOURNE

Level 14, 222 Exhibition St Melbourne VIC 3000 +61 3 8616 0331 sgsvic@sgsep.com.au

SYDNEY

209/50 Holt St Surry Hills NSW 2010 +61 2 8307 0121 sgsnsw@sgsep.com.au









architectus TM

© SGS Economics and Planning Pty Ltd 2019

This report has been prepared for Northern Beaches Council. SGS Economics and Planning has taken all due care in the preparation of this report. However, SGS and its associated consultants are not flable to any person or entity for any damage or loss that has occurred, or may occur, in relation to that person or entity taking or not taking action in respect of any representation, statement, opinion or advice referred to herein.

5G5 Economics and Planning Pty Ltd ACN 007 437-729 www.sgsep.com.au Offices in Cariberra, Hobart, Melbourne, Sydney



Introduction Introduction and context for this Issues and Opportunities Paper. Introduction and context for this Issues and Opportunities Paper. Introduction and context for this Issues and Opportunities Paper. International context for this Issues and Opportunities Paper. International context for this Issues and Opportunities International context for the Northern Beaches International development in the LGA. Internation and change in housing need. Internation demoning in the LGA. Internation demoning in the LGA.

SGSEP.COM.AU

housing.

m

309



Current Planning controls and notional capacity for development. Turnent planning controls and notional capacity for development. Future Housing Principles Future Housing Principles Spatial Options for Location of Housing Spatial Options being considered for the Discussion of spatial options being considered for the Strategy. Place Based Opportunities Place Northon Centres under different options. Discussion of opportunities around centres under different options. Discussion of potential approach for the housing approach for the housing strategy.

÷

SGSEP.COM.AU

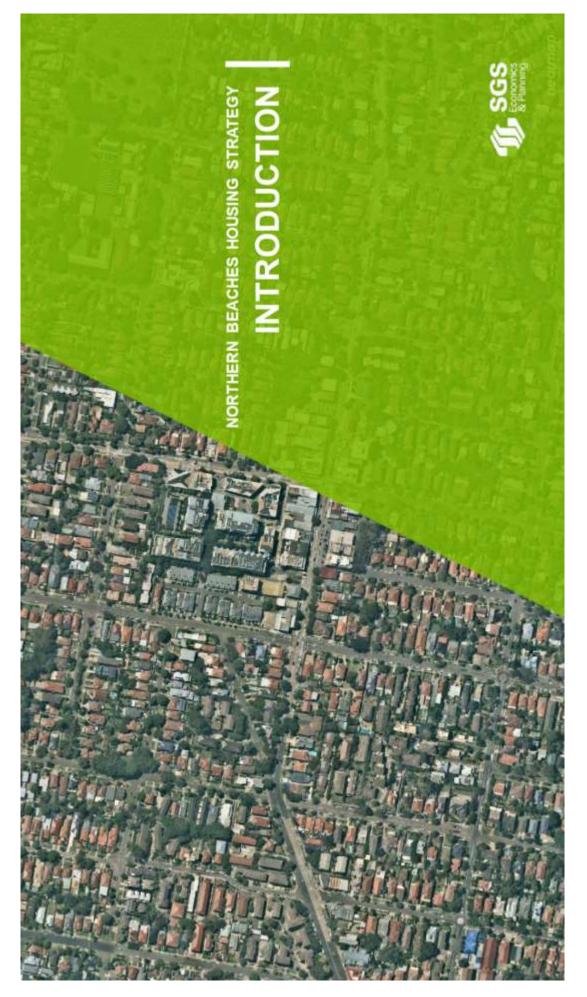


ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

×n



SGSEP.COM.AU

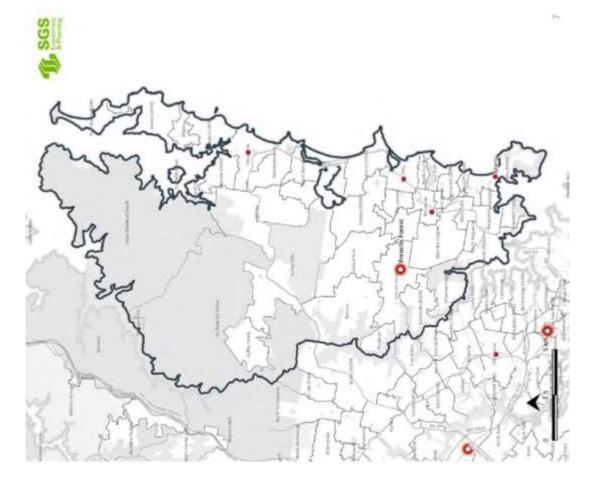


SGSEP.COM.AU

Introduction

- The Northern Beaches LGA is located in the Greater Sydney region in the Northern District identified by the Greater Sydney Commission for planning for Sydney's future.
- The LGA covers a range of different environments, stretching along the coastline and into the hinterland from Manly in the south to Palm Beach in the north as well as extending west into the Ku-Ring-Gai Chase National Park.







ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

00



SGSEP.COM.AU

new housing.

Strategy (LHS).



Purpose of this Issues and Opportunities Paper

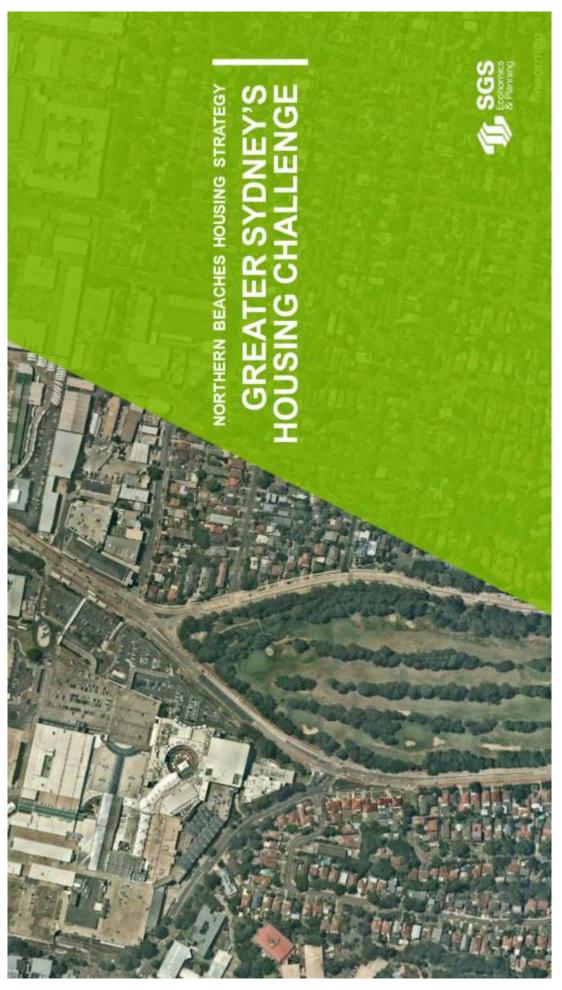
The purpose of this Issues and Opportunities Paper is to:

.

- Summarise the findings from background analysis and Identify key housing issues for the Northern Beaches
 - the evidence base that has been used to inform this paper and the housing strategy
- Identify the LGA's changing housing needs and future demand for housing, including affordable housing
 - Identify existing capacity for housing and how this compares to projected future demand i
- Establish the housing vision and principles for the LGA, Northern Beaches' Local Strategic Planning Statement that will be part of both the housing strategy and the (LSPS)
- Explore spatial options and approaches to the delivery of future housing
- Identify a potential land use planning approach and potential housing typologies, and other housing opportunities for the LGA 1
- SGSEP.COM.AU

discussed. Community feedback will be used to inform the feedback from the community on the issues and options Northern Beaches Council is seeking comments and preparation of the draft Northern Beaches LHS. a







ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

1

Greater Sydney's housing challenge

- As of 2016, Greater Sydney was home to around 4.7 million people. The NSW Department of Planning, Industry and Environment (DPIE) projects the population to increase to around 6.4 million by 2036. This is an increase of over 1.7 million people or approximately 37 per cent on current population levels.
- Planning for this increased rate of growth while maintaining the liveability of Sydney's suburbs will be challenging. It will require consideration of how to best accommodate more population in established areas as well as at Sydney's fringes. Each part of the Greater Sydney Region is currently proposed to house more people and dwellings, including the Northern Beaches LGA.
- According to the ABS, the estimated residential population of the Northern Beaches LGA in 2016 was 265,468. DPIE projections forecast that this will grow to an estimated 297,950 people by 2036. This is an additional 32,482 people (12.2% increase or 0.6% annual growth rate). The DPIE projections have estimated that this will require an additional 17,450 dwellings between 2016 and 2036.



Source: 565, 2019

SGSP-COMAU



Greater Sydney's housing challenge

- Historically most population growth in Greater Sydney has been accommodated in four main ways:
- The development and conversion of rural and agricultural land at Sydney's fringes,
- The consolidation of established residential neighbourhoods, including policies which allow development of dual occupancy dwellings as well as forms such as villa housing suitable for seniors (e.g. Warriewood),
- The construction of higher-density apartment housing around existing centres and public transport (e.g. Dee Why), and
- The redevelopment of former industrial sites for highdensity apartment complexes.
- It is likely that each of these kinds of development will have a role in housing Sydney's growing population in the future.
- Planning for Northern Beaches' future must consider what kinds of housing will most appropriately accommodate the needs of the local community and will be most suitable in

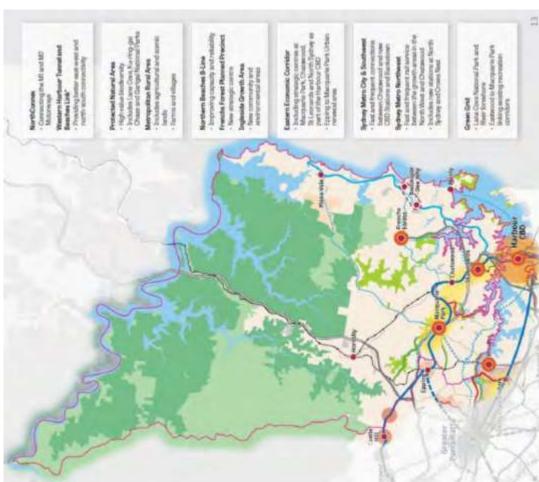
SGSEP.COM.AU

the context of climate change and environmental challenges. The provision of adequate infrastructure also needs to be considered in the future planning of housing.

Sydney's urban boundary cannot continue to expand without limit, and dwellings built in existing suburbs near public transport are often better located than similar dwellings built on the urban fringe, often far away from public transport, job and services. 3



ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019



Policy context

- The Greater Sydney Region Plan (GSRP) envisages a metropolis of three cities and a 30-minute city, to allow residents quicker and easier access to a range of jobs, housing types and activities.
- The GSRP splits Sydney into five districts, with the Northern Beaches in part of the North District. Key priorities for housing under both the GSRP and the North District Plan include increasing overall housing supply, and ensuring that housing becomes more diverse and affordable.
- The North District Plan includes a 20-year housing target of an additional 92,000 dwellings by 2036 across the North District.
- The Northern Beaches has a five year housing supply target to 2021 of 3,400 additional dwellings. This represents 13 per cent of the target for the North District over this timeframe.
- Under the LHS, Councils are expected to develop 6-10 year housing targets through the process of developing their housing strategy.

SGSEP.COM.AU



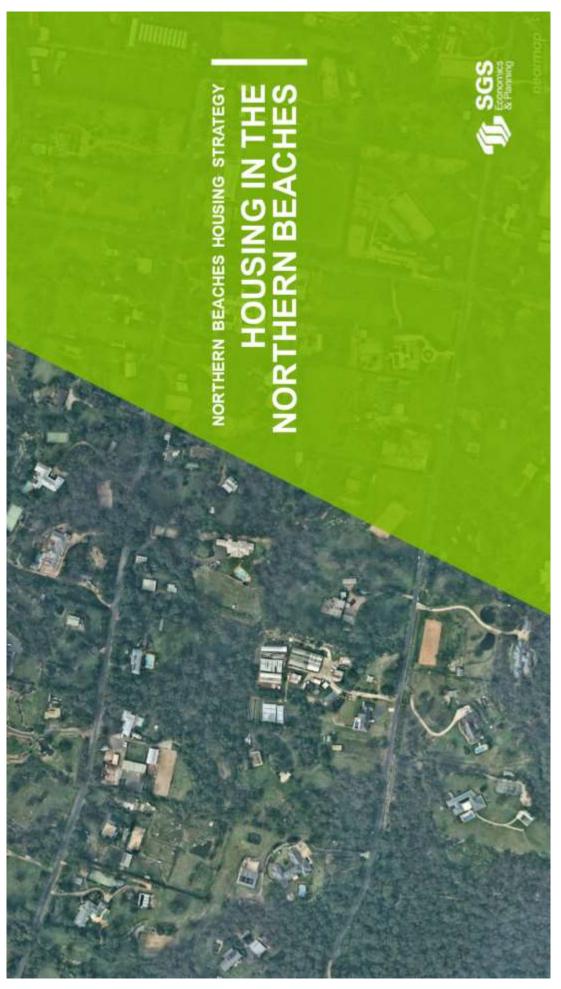
Key issues for Northern Beaches

- A review of Council documents identifies key issues for the Northern Beaches in particular include the need for:
- More affordable housing stock social and affordable housing stock is at historically low levels across the LGA, with wait times for public housing currently over 5 years. At the same time, median property prices and rents have increased significantly.
- Better transport connectivity the LGA currently has limited accessibility by public transport, which can make it difficult to accommodate new dwellings close to jobs and services. Further growth will require appropriate accompanying infrastructure.
 - Sustainable growth that maintains the character of the LGA – a key strength of the Northern Beaches is its natural environment and amenity, however this also constrains the potential for future housing development.
 - Greater housing diversity a greater diversity in housing types will be needed to cater to different demographic groups and household types, including an ageing population.
- SGSEP COMAU

- Council's current strategic planning documents, such as the SHAPE 2018 Community Strategic Plan and draft MOVE Transport Strategy, include a focus on sustainable growth, concentrating more intensive development around existing centres (i.e. Frenchs Forest), and linking future growth to improvements in transport.
- Council has also identified a clear need for more affordable housing across the LGA, and to cater to a range of housing needs, including the potential for downsizing for an ageing population.
- The community has voiced support for the need to retain the character of the LGA, and particularly its environmental values.

5





ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019





Transition (mix of densities/character) Environmentally Sensitive Residential Metropolitan Rural Arre Neighbourhood Centre Small Local Centre Other Rural Area Medium Density Strategic Centre Local Centre tow Density Character areas Legend

Current forms of housing

- To assist in identifying potential areas for future distinguishable development character areas, housing, the LGA has been divided into shown in the map.
- control plans (DCPs). Council will be undertaking and overlays outlined in the LGA's development These are different from local character areas a character study which will consider housing character at a more localised level.
- Separate houses remain the most common form dwellings, and apartments around 35 per cent. of housing in the LGA, making up over 50 per dwellings account for around 10 per cent of cent of dwellings in 2016. Semi-detached

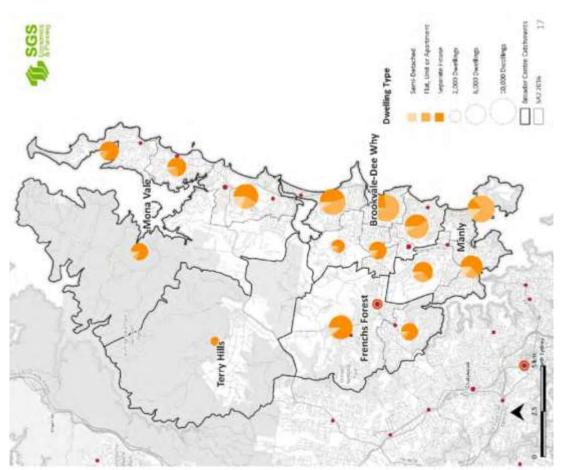
LGA	Separate house	Semi-detached	Flat, unit or spartment	Other
Total dwellings	56,537	9,548	34,541	438
Proportion of total	56%	%6	34%	9%0

SGSEP.COM.AU



northern beaches council

- Compared to the North District and Greater Sydney, the LGA has a slightly higher proportion of detached houses.
- Between the 2011 and 2016 Censuses, semi-detached and apartments dwellings increased as a proportion of total dwellings.
- Predominant dwelling types vary between suburbs across the LGA. Areas further inland, such as Terrey Hills and Frenchs Forest, have much higher shares of separate houses. Coastal locations and areas around the major centres, like Manly and Dee Why, have much higher proportions of semi-detached and apartment dwellings.





2018-19*

2017-138

11-9107

1940 FROM

Detached

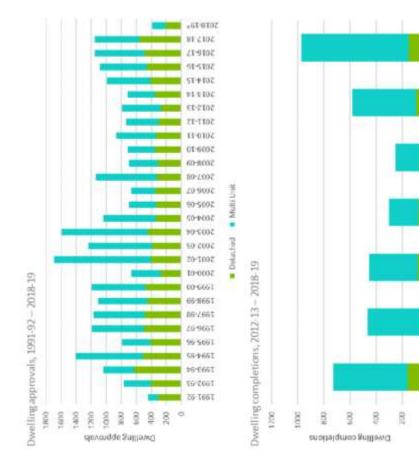
474007

2013-14

2012-13

3

20





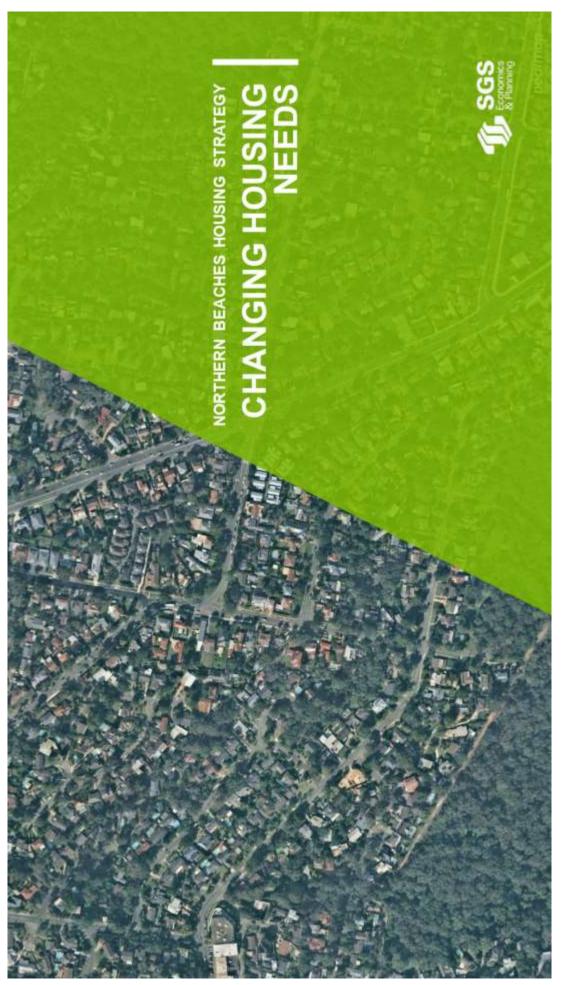
Development trends

- Consistent with Census trends, DPIE's Metropolitan Housing Monitor dwelling approvals data shows that a significant proportion of dwelling approvals in the Northern Beaches LGA in recent years have been for multi-unit housing.
- Since 1991-92, multi-unit housing has accounted for 59 per cent of dwelling approvals.

.

 Dwelling completions since 2013 have also reflected this trend, with multi-unit dwellings accounting for 79 per cent of completions over this period.

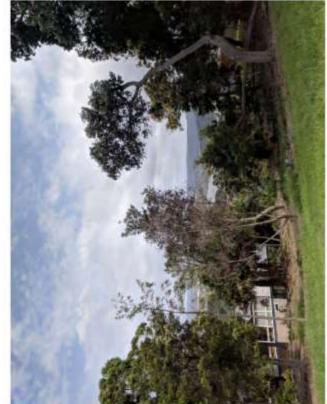




Changing housing needs

- To understand the changing nature of housing need on the Northern Beaches a number of factors have been considered, including:
- Household types and the types of dwellings that different households live in
- Forecast population growth and changes in household types across the LGA ï
- Housing preferences among different age cohorts and family types.
- Housing model projections of demand for different dwelling types
- Adjusted housing model projections under a scenario with different assumptions.
- These steps are outlined in the following pages.











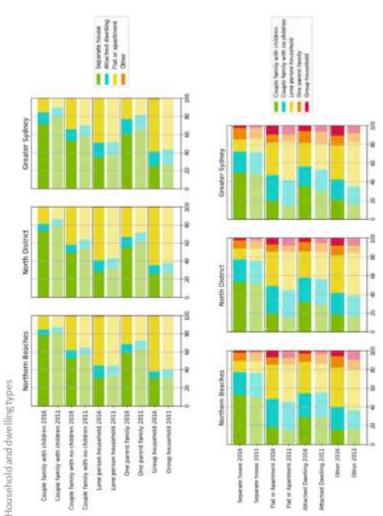
ATTACHMENT 2



northern beaches council

ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

77



Source: ABS 2006 and 2016 Census es

SGSEP.COM.AU

Changes in household types

- Couples with children are the most common household type in the Northern Beaches LGA, accounting for over 35 per cent of households.
- Couples with children had the highest rate of growth between the 2011 and 2016 Censuses, with a compound annual growth rate (CAGR) of around 3.4 per cent.
- Compared to the North District and Greater Sydney, the LGA has a slightly higher proportion of couples with children, single parent, and couple only households.
- Couple family households in the LGA tend to occupy detached dwellings, with less than one third occupying attached or apartment dwellings.
- Higher density dwelling types in the LGA predominantly house couples without children and lone person households.
- The proportion of families with children living in apartment dwellings increased slightly between 2011 and 2016, with a similar shift seen across the District and Greater Sydney.





- 2018, there were estimated to be around 271,280 people The Northern Beaches LGA population is forecast to grow representing an increase of around 32,482 people. As of from 265,468 people in 2016 to 297,950 by 2036. iving in the Northern Beaches. •
- The forecast growth equates to an annual growth rate of 0.6 per cent, compared to the NSW annual population change of 1.1 per cent.
- Beaches is forecast expected to remain relatively consistent The share of household family types across the Northern over this period.

328

Couple families with children are projected to continue to couples with no children and lone person households. be the most common type of household, followed by

Source: 565, 2019

Couple turnity w/o children 2031 - Other family 2026 Fore cast change in household types, 2016-2036 1002 - One parent family Group Hhold 2018 2016 130,000 100,000 140,000 120,000 100,000 80,000 60,000 40,000 20,000 0

2086

SGSEP.COM.AU

northern beaches council

ATTACHMENT 2 Technical Studies





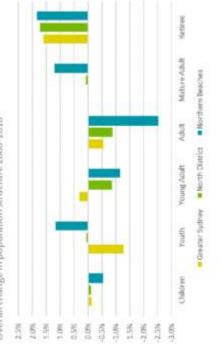
It is important to consider the varying housing preferences of different demographic groups and household types.

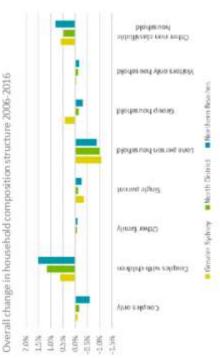
٠

- Family households are likely to require larger apartments, more affordable medium density options (such as townhouses), or detached dwellings. ï
- An ageing population will increasingly require accessible dwellings which are located close to health and community services and centres.
- affordable and accessible locations, and if this is not Young workers will be increasingly looking for more available may choose to leave the LGA.
- Students will be looking for affordable accommodation that is located close to public transport. 1
- purchase housing in close proximity to their place of Key workers will be looking for affordable rental or work 1
- may need to compromise on the type of dwelling or location If a diversity of housing is not provided which responds to the unique needs of these groups then these households they can live in. .

SGSEP.COM.AU

Overall change in population structure 2006-2016





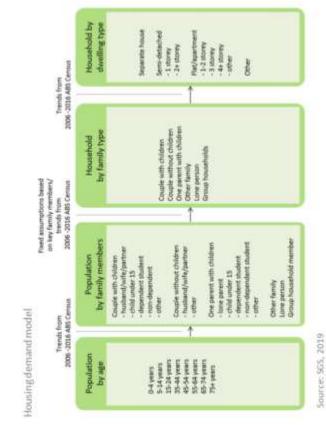


Ţ,

Source: ABS 2006 and 2016 Censuses



- Future housing demand, by household type, and dwelling type has been forecast using the SGS housing propensity model.
- Underlying dwelling demand is estimated based on population projections for the region and analysis of trends in demographics and housing preferences from recent Censuses.
- Trade-offs made by households between dwelling location, size and type are captured in historical trends and demographic propensities.
- This modelling generates a different forecast number of dwellings to the DPIE's forecasts (implied dwellings) for the LGA, as the modelling uses different assumptions around household size.



SGSEP.COM.AU



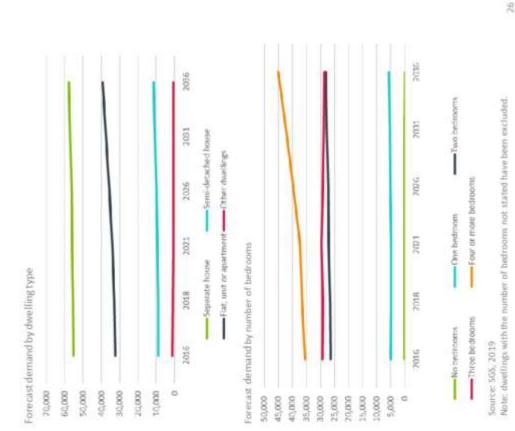
Future housing demand

- There is estimated to be demand for an additional 11,267 dwellings by 2036 in the LGA. This equates to an average of approximately 626 dwellings per year.
- The majority of this demand compared to 2018 levels is expected to be for flats, units or apartments (around 6,600 dwellings), followed by semi-detached houses (around 2,500 dwellings) and separate houses (around 2,300 dwellings)
- Apartments and semi-detached dwellings are projected to increase as a proportion of the LGA's dwellings, while the proportion of detached houses is expected to decrease from 56 per cent in 2018 to 53 per cent by 2036.
- While there is likely to continue to be demand for detached houses, accommodating this demand is not likely to be possible given environmental and other constraints. This demand is likely to instead be channelled into larger forms of attached dwellings, which have similar characteristics and gardens, but are able to be provided as infill development.

Dwellingtype	2016	2018	2021	2026	2031	2036	2016-36	2018-36	AAGR
Separate house	55,250	55,506	56,060	56,440	57,100	57,800	2,550	2,294	9,53%
Semi-detached house	8,840	050'6	9,470	10,120	10,840	11,590	2,750	2,540	138%
Flat, unit or apartment	32,390	32,945	34,050	35,670	37,560	39,540	7,150	6,595	1.02%
Other dwellings	1,170	912	740	720	730	750	-420	-162	-1.08%
TOTAL	97,650	98,413	100,320	102,950	106,230	109,680	12,030	11,267	0.60%

SGSEP.COM.AU





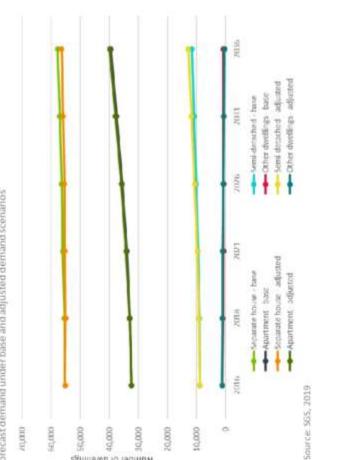
SGSEP_COMAU

Future housing demand by type

- Semi-detached dwellings are forecast to have the strongest growth rate of the dwelling types, at 1.4 per cent per annum (compared to around 1.0 per cent for apartment dwellings, and 0.2 per cent for detached housing).
- This suggests that there will be increased demand for smaller, more affordable houses that are close, and easily accessible, to services and transport.
- The largest growth in demand is forecast for four or more bedroom dwellings, with an additional 9,600 dwellings demanded by 2036. Two bedroom dwellings also have a large demand forecast, with demand for an additional 1,700 by 2036.
- It is important to note that the demand modelling is based on past Census trends, which saw increased provision of larger dwellings over time. It does not account for whether larger dwellings are being inhabited by larger households or whether the types of housing available on the Northern Beaches is meeting the needs of residents.



2



Forecast demand under base and adjusted demand scenarios

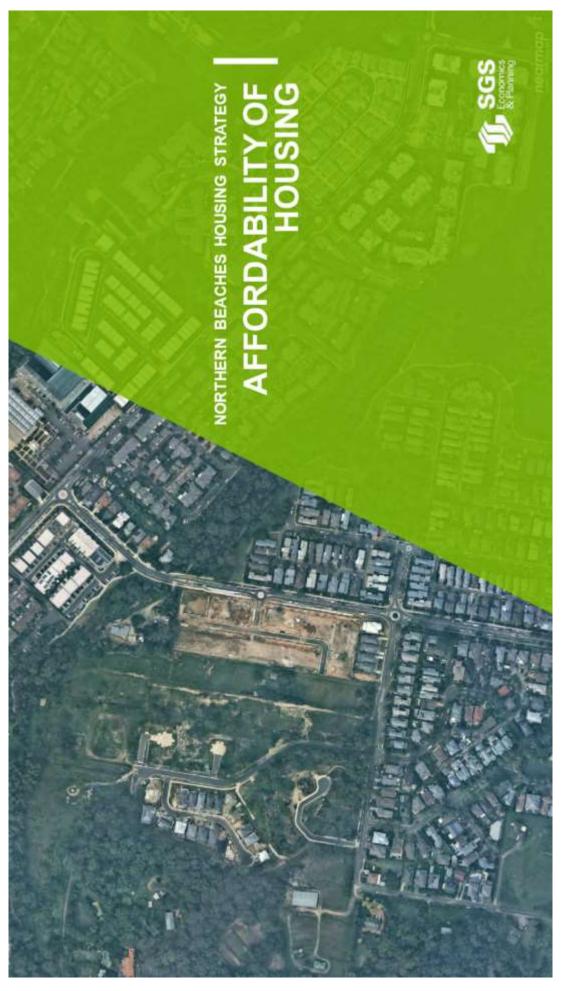
Alternate future housing demand

- share of households and dwelling types in the Northern To consider the different type of demand that could be preferences are constrained, adjusted housing demand modelling has been undertaken. This assumes that the Beaches LGA in 2036 becomes similar to other LGAs in generated if opportunities to achieve dwelling the North District. .
- apartment dwellings, reflecting a scenario where there is This has been assumed because these LGAs tend to have medium density housing compared to the housing that has historically been developed in the Northern Beaches. a higher level of demand for smaller, semi-detached and a higher overall proportion of semi-detached and

Number of dwellings

- It also reflects a transition to more urban centres and a households and impacts of housing affordability are greater focus on infill development, as the needs of considered.
- The adjusted demand scenario sees the strongest growth in additional demand for apartment dwellings, of around 6,930 between 2018 and 2036, and for semi-detached dwellings and separate houses of around 3,660 and 1,390 dwellings respectively. .



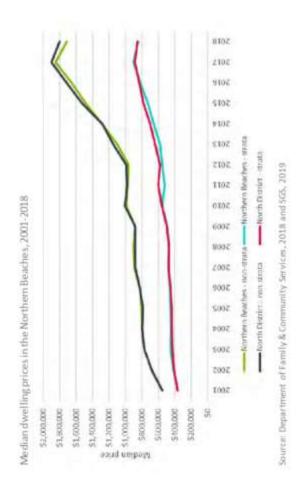


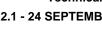


52

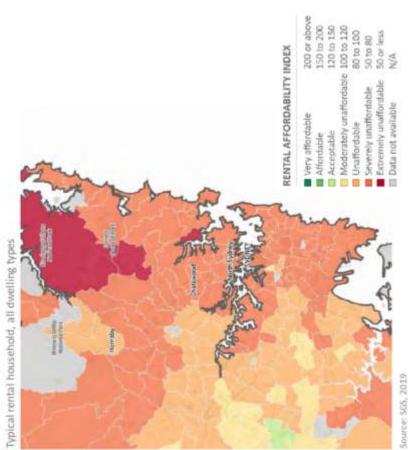


- The need for social and affordable housing (SAH) remains a key issue for the Northern Beaches with existing property prices and rents.
- Median dwelling prices in the Northern Beaches LGA have grown substantially in recent years.
- Since 2001, the median price for non-strata dwellings has grown from \$550,000 to over \$1.7 million – representing growth of over 200 per cent.
- Median prices for strata titled dwellings have increased by around 130 per cent since 2001, increasing from \$365,000 to \$850,000.
- There was a significant increase in prices for both strata and non-strata dwellings between 2012 and 2017, with a noticeable decline observed in 2018.
- Prices in the LGA have generally been consistent with those across the North District.





8

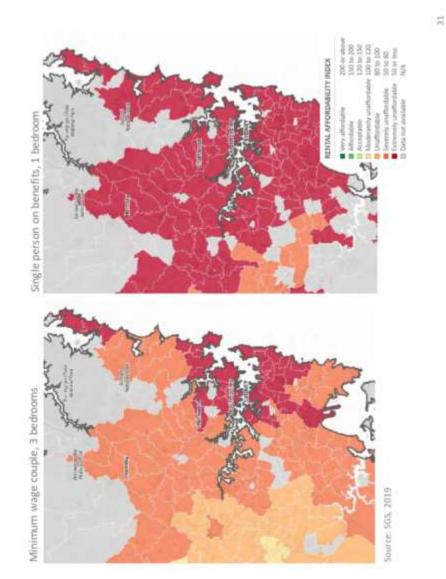


SGSEP.COM.AU

Affordable and social housing

- Beaches is reflected in the results of the The limited affordability of the Northern Rental Affordability Index (RAI).
- The RAI measures rental affordability using the where households in the lowest 40 per cent of incomes paying more than 30 per cent of their 30/40 rule in relation to household incomes, income on rent are considered to be in housing stress.
- For the most recently available quarter, rents in the Northern Beaches LGA were rated as Unaffordable for a typical rental household. Severely Unaffordable to Extremely





Affordable and social housing

- The lack of affordable housing is particularly pronounced for households on lower incomes.
- The maps to the right show the affordability for:
- A couple earning the minimum wage seeking a three bedroom dwelling, and
- A single person on government benefits seeking a one bedroom dwelling.
- Much of the LGA is rated as Extremely Unaffordable for these household types.



Demand for social and affordable housing

- he term 'social housing' includes public and community refers to affordable rental housing for very low, low and housing, while the term 'affordable housing' generally housing (SAH) includes both of these categorisations. moderate income households. Social and affordable
- Household financial stress, which drives demand for SAH, is nfluenced by a range of factors, including the supply and ocation of housing stock. Households who are in need of SAH can be defined as either:
- Being unable to access market housing (including homeless persons), or
- proportion of those income on rent (experiencing rental Having low household incomes and spending a high stress)
- Modelling has been undertaken to project the need for SAH Census data and the NSW Affordable Housing Guidelines. in the Northern Beaches LGA, using a combination of
- public housing tenancies in the Northern Beaches LGA (not historically low levels. As of 2017, there were around 1,201 The provision of SAH dwellings across the LGA has been at including other community housing stock), with a large

SGSEP.COM.AU

recently been transferred to community housing providers. Management responsibilities for these dwelling have proportion of these one bedroom or studio units.

- 10,000 SAH dwellings in the LGA. Existing demand is largely As of 2016, there was estimated to be demand for around made up of the 7,500 households experiencing either moderate or severe rental stress.
- Compared to Greater Sydney, there is less demand for SAH in the Northern Beaches, at 10 per cent of households compared to 17 per cent for the wider city.
- exclusive of households already residing in social housing experiencing rental stress suggest that there is currently However, the number of households either homeless or unmet demand for SAH in the order of 8,100 dwellings dwellings)
- There may also be additional current unmet demand from households living elsewhere who want to live in the Northern Beaches, but cannot afford to.

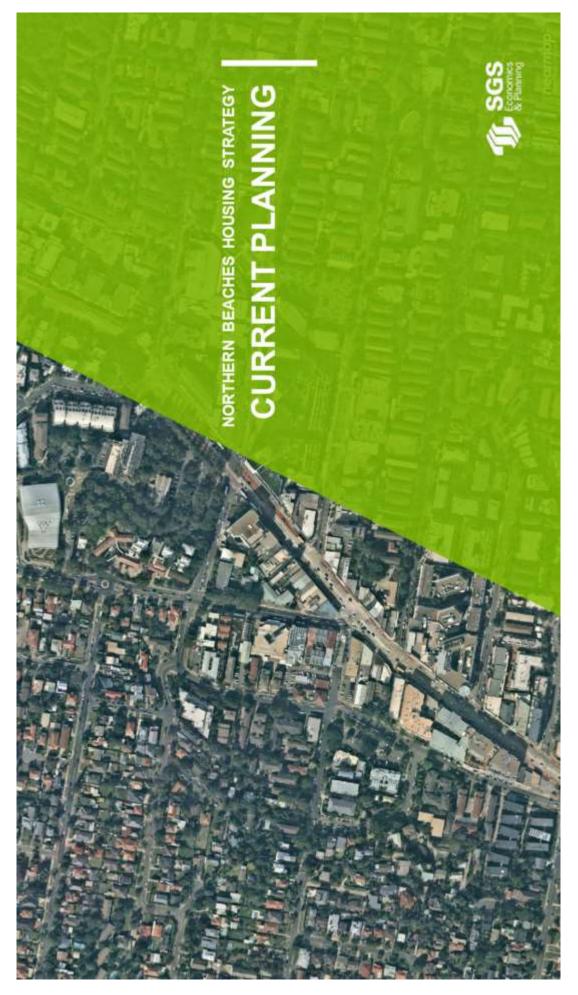


Demand for social and affordable housing

- Demand for SAH in the LGA is projected to increase by around 2,000 households by 2036, to a total of around 12,000 dwellings. This includes the current unmet demand of around 8,100 dwellings from households experiencing homelessness and rental stress.
- 'Other family' household types are projected to have the fastest rate and volume of growth in demand for SAH over this period. This is consistent with trends across NSW, being driven by the ageing of the population and more complex household compositions overall
- Future demand for SAH will also shift with improving or worsening affordability conditions, including shifts in wage growth and house prices. ٠

	2016	2021	2026	2031	2036	Change	AAGR
Couple family with children	1,639	1,655	1,663	1,683	1,713	74	0.22%
Couple family with no children	2,070	2,133	2,243	2,369	2,490	420	0.93%
Families (sub-total)	3,709	3,788	3,906	4,052	4,203	494	0.63%
One parent family	726	716	726	748	780	53	0.36%
Other family	4,021	4,230	4,534	4,890	5,254	1,233	1.35%
Group household	1,353	1,402	1,459	1,516	1,581	228	0.78%
Lone person household	189	180	189	199	199	6	0.24%
TOTAL	866'6	10,314	10,813	11,404	12,017	2,018	0,92%







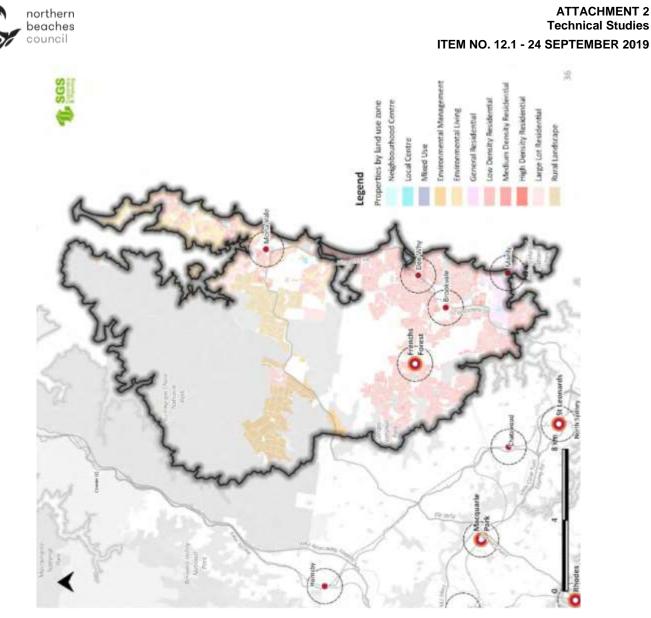


SGSEP.COM.AU

There are currently four Local Environmental Plans (LEPs) which apply in the Northern Beaches LGA:

Current local environmental plans

- Manly LEP 2013
- Pittwater LEP 2014
- Warringah LEP 2011
- Warringah LEP 2000 (only applies to some deferred matter areas)
- Each of the LEPs and associated development control plans (DCPs) have different controls that apply to residential development, including the types of housing permitted in different zones, building heights, minimum lot sizes and so on.
- The current zoning across the LGA is illustrated to the right.



Residential zones

- This map illustrates the land and zones where residential development is currently permitted under the LEPs.
- The tables on the following pages show the types of housing permitted under the current LEP zoning.

PERMISSIBLE USES* R1 General Residential		Maniy 2013 Attached dwellings Bed and breakfast accommodation Boarding houses Dual occupancies Dual occupancies Group houses Group houses Readental flat buildings Secondary dwellings Semi-detached dwellings Semi-detached dwellings Seniors housing Shop top housing	Pittwater 2014	NAN N/A	it i
R.2 Low Density Residential	7	Attached dwellings Bed and breekfast accommodation Boarding houses Dual occupancies Group homes Muth dwelling housing Secondary dwellings Semi-detached dwellings Semi-detached dwellings	 Bed and breakfast accommodation Boarding houses Dual occupancies Dual ing houses Group homes Secondary dwellings 		Bed and breakfast accommodation Bearding houses Owelling houses Group homes Secondary dwellings
R3 Medium Density Resident ini		Attached dwellings Boarding houses Dual occupancies Dwelling houses Group homes Hostels Multi dwelling housing Residential flat buildings Secondary dwellings Semi-detached dwellings Semi-ors housing Shop top housing Shop top housing Tourist and visitor accommodation	 Attached diwellings Bed and breakfast accommodation Boarding houses Dual occupancies Dwelling houses Exhibition homes Group homes Group homes Group homes Residential flat buildings Secondary dwellings Semi-detached dwellings Serviced apartments 		Attached dwellings Bed and breakfast accommodetion Boarding houses Duel occupancies Dweiling houses Exhibition homes Group houses Multi dwellings Residential flat buildings Secordary dwellings Secords housing

Current local environmental plans



PERMISSIBLE USES	Manly 2013	Pittwater 2014	Warringah 2011
R5 Large Lot Residential	N/A	 Bed and breakfast accommodation 	N/A
		 Dual occupancies (attacned) 	
		 Dwelling houses 	
		 Secondary dwellings 	
E3 Environmental	 Bed and breakfast accommodation 	 Bed and breakfast accommodation 	 Bed and breakfast accommodation
Management	 Dwelling houses 	 Dwelling houses 	 Dwelling houses
	 Secondary dwellings 		
E4 Environmental Living	 Attached dwellings 	 Bed and breakfast accommodation 	 Bed and breakfast accommodation
	 Bed and breakfast accommodation 	 Dwelling houses 	 Dwelling houses
	 Dual occupancies (attached) 	 Group homes 	
	 Dwelling houses 	 Secondary dwellings 	
	 Multi dwelling housing 		
	 Residential flat buildings 		
	 Secondary dwellings 		
	 Semi-detached dwellings 		
RU2 Rural Landscape	N/A	 Bed and breakfast accommodation 	N/A.
		 Dual occupancies (attached) 	
		 Dwelling houses 	
		 Secondary dwellings 	
RU4 Primary Production	N/A	N/A	 Bed and breakfast accommodation.
Small Lots			 Dwelling houses
B1 Neighbourhood Centre	 Boarding houses 	 Boarding houses 	 Boarding houses
	 Group homes 	 Shop top housing. 	 Shop top housing
	 Hostels 		
	 Shop top housing 		
82 Local Centre	 Boarding houses 	 Boarding houses 	 Boarding houses
	 Group homes 	 Shop top housing 	 Shop top housing
	 Hostels 	 Tourist and visitor accommodation 	 Tourist and visitor accommodation
	 Shop top housing 		
	 Tourist and visitor accommodation 		
B4 Mixed Use	N/A	 Boarding houses 	 Boarding houses
		 Hotel or motel accommodation. 	 Hotel or motel accommodation
		 Seniors housing 	 Residential flat buildings
		 Shop top housing 	 Seniors housing

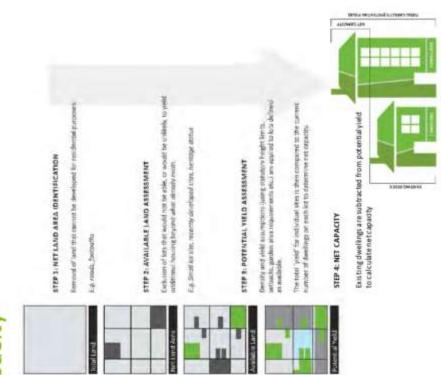


"Subject to other applicable LEP provisions

ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019



65



SGSEP.COM.AU

Method for assessing existing notional capacity

- An assessment of housing capacity has been undertaken for the LGA, based on the existing planning controls and recent housing supply trends.
- This is a theoretical assessment of the maximum number of dwellings that could be developed, and is intended to be indicative rather than absolute.
- The capacity assessment uses the 4-step process illustrated to the right to determine the potential volume of dwelling capacity in the LGA.

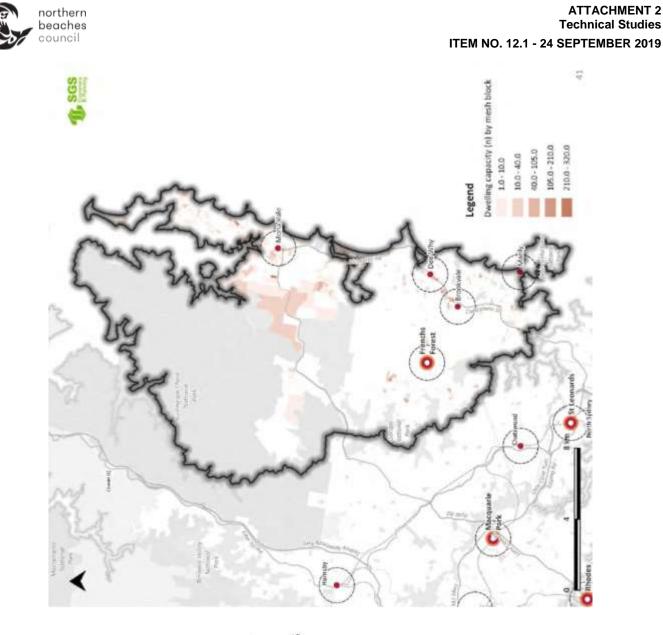


Notional capacity by dwelling type

- The theoretical capacity assessment suggests that if all available areas are fully developed, the LGA could accommodate around 8,800 dwellings. ۰
- Combined, this suggests an overall capacity for around which is not factored into current planning controls. In addition, there is a maximum of 4,360 dwellings identified for the Frenchs Forest Planned Precinct, 13,100 dwellings. H
- Much of the existing capacity is in the form of multiunit housing, residential flats, and shop top housing. 1

Highest permissible dwelling type	Existing number of d evelopable properties	Existing number of dwellings	Maximum number of dwellings	Raw capacity
Dual occupancies	551	547	1,102	555
Dwelling houses	44	19	147	127
Multi-dwelling housing and residential flat buildings	604	724	5,742	5,018
Shop top housing	261	99	3079	3,012
Density-controlled lots*	63	58	155	25
TOTAL	1,523	1,414	10,225	8,809
Frenchs Forest Planned Precinct	Precinct			4,360
TOTAL INCL. PLANNED PRECINCTS	RECINCTS			13,169

SGSEP.COM.AU



Location of notional capacity

- The identified existing capacity is generally concentrated around a number of centres, including Dee Why, Brookvale and Mona Vale.
- A comparatively limited amount of capacity is identified in rural and environmentally sensitive locations.
- The proposed maximum number of dwellings as part of the Frenchs Forest Planned Precinct represents around 33 per cent of the total capacity (or 49 per cent of notional capacity including the Planned Precinct).



Zone	Existing number of developable properties	Existing number of dwellings	Maximum number of dwellings	Raw capacity
81	89	0	437	437
82	177	0	1,893	1,893
84	55	0	1,718	1.718
B5*	26	99	527	460
8	1	2	m	1
E4	7	4	п	7
R1	E P	49	112	B
82	420	398	902	503
R3	554	726	4,277	3,551
RS	63	63	129	99
802	108	106	215	109
RU4	1	0	1	1
TOTAL	1,523	1,414	10,225	8,809
Frenchs Forest Planned Precinct	Precinct			4,360
TOTAL INCL. PLANNED PRECINCTS	RECINCTS			13,169

ŝ

> Much of the identified capacity is located in the B2, B4 and R3 zones. ٠

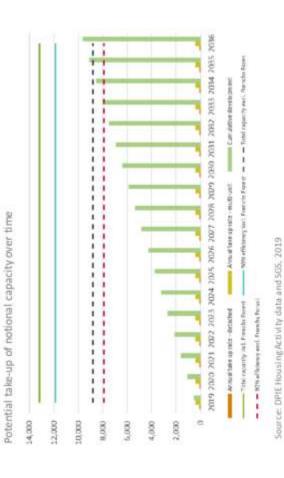
Notional capacity by zone

sites identified as having available capacity will It is important to recognise that not all of the be developed, for a range of reasons. ٠





- The take up of dwelling development is important to understanding how long the identified capacity may last for.
- Between 2012-13 and 2018-19, on average there have been around 530 dwelling completions per year.
- Assuming these take up rates continue, applying this to the overall notional capacity under current controls suggests that:
- Including the capacity at Frenchs Forest, there would be some notional capacity remaining in 2036, even when assuming a 90 per cent efficiency rate (recognising that not all lots with capacity will be redeveloped).
- Without Frenchs Forest, the notional capacity would be exhausted by 2036.
- As there is less existing capacity identified for detached dwellings, this capacity would be exhausted sooner than the capacity for multi-unit dwellings.

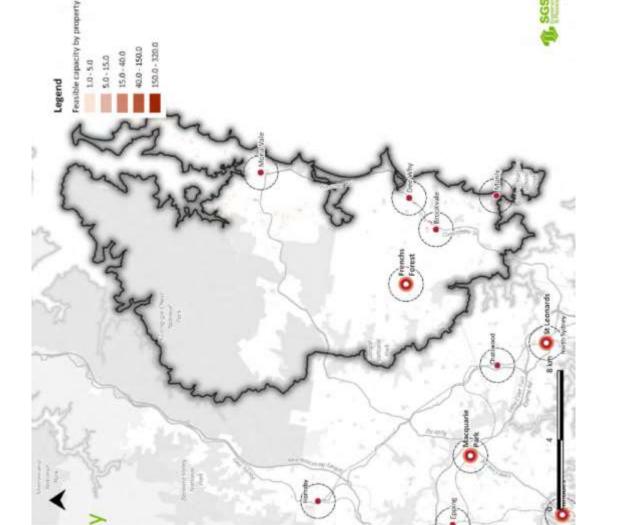


Approach to development feasibilit

- undertaken as a form of sensitivity testing. This factoring in construction, land value, and other gives an indication of the relative feasibility of different types of dwellings across the LGA, A high level feasibility analysis has been costs.
- model, where the RLV is the development return This analysis has used a residual land value (RLV) maximum amount a rational developer will pay minus the development cost, measuring the for a site for redevelopment.
- For development to be feasible, the RLV needs to that development would be marginally feasible. be greater than the site value, expressed as a margin. Ratios between 1.0 and 1.25 suggest development is feasible, including a profit ratio. A ratio of 1.25 or above suggests
- his analysis has identified that there are around development, and a further 110 lots marginally 6,300 lots which are likely to be feasible for feasible.

SGSEP.COM.AU









150.0 - 320.0 40.0 - 150.0 15.0 - 40.0 5.0-15.0 1.0-5.0





High level development feasibility scenarios

- centres is generally less feasible. Site specific environmental identified as feasible. Infill development further away from Most shop-top housing and apartment development is and other constraints will also limit the potential for development in some areas.
- therefore a higher return) to be considered feasible, shows development requires a higher RLV ratio of 1.5 (and Assuming a more conservative scenario, where a further reduced feasible capacity.

351

- Under this assumption, there are around 6,000 feasible, and 390 marginally feasible lots identified
- the capacity for future development under current planning This suggests that under less favourable market conditions, controls would be further limited, and less able to meet future demand for housing.
- Assuming the same take up rates as recent years, there however, without the inclusion of Frenchs Forest the would be some feasible capacity remaining in 2036, capacity would be exhausted prior to this.

SGSEP.COM.AU

Base feasibility scenario

(RLV 125+) (RLV 10-125) ing and 3,963 72 ings 1,821 17 381 11 127 - 127 - 18 14	Davidonment tuna	Feasible	Marginally feasible	Infachia
nuing and 3,963 72 ilidings 1,821 17 is 381 11 127 - d* 18 14	sette menuelle set	(RLV 1.25+)	(RLV 10-1.25)	
d* 1821 17 11 381 11 127 - 18 14	Aultu-dwelling housing and esidential flat buildings	E96'E	и	686
d* 381 11 127 - 16 18 14	hop top housing	1,821	17	1,174
d* 18 14	bual occupancies	381	11	162
-controlled* 18 14	bwelling houses	127	×	*
	bensity-controlled*	18	14	65
0,510 114	TOTAL	6,310	114	2,384

Development type	Feasible (RLV 1.5+)	Marginally feastble (RLV 1.0-1.5)	Unfeastile
Multi-dwelling housing and esidential flat buildings	3,823	212	983
Shop top housing	1,707	131	1,174
Dual occupancies	372	20	162
Welling houses	127	70	8
Density-controlled*	4	28	65
TOTAL	6,033	391	2,384

*Density-controlled lots are located in an area within Manly which has a dwelling density control.



A gap analysis has been undertaken to show the difference between the forecast demand for housing and the identified capacity

for housing.

Approach to gap analysis – assessing capacity and demand

projections. The assumed average household in the DPIE projections is smaller than that used in SGS' demand modelling (as In addition, a sensitivity test has been done to consider the impact of a smaller household size, based on DPIE housing

shown below) illustrating a scenario where there is demand for housing from a greater number of households.

	2016	2018	2021	2026	2031	2036	Comparison of household projections	ojections			
SGS model							120,000				
Population	265,468	266,026	270,150	275,000	287,650	056,722	115,000				1
Households	37,648	519'95	100,320	056,201	106,230	100,680	110,000			i	1
Average household size	2.72	2.70	2.69	2.70	2,71	272	105,000		i		
DPIE projections							100,000				
Population	263,700	266,240	270,050	278,000	287,650	197,950	95,000				
Households	052'66	100,410	102,000	105,650	110,300	115,150	000'06				
Average household size	2.62	2.65	2.61	2.59	122	2.54	85,000 2016 2018	2021	2026	2031	2036
Adjusted households	97,648	99,645	101,325	520 h01	108,095	113,565	tedat	OP IE projections	Adiu	- Adjusted DPIE households	reholds

	northern beaches council
--	--------------------------------

Ģ

	Estimated number of dwellings	In cluding Frenchs Forest Planned Precinct
Notional capacity under current controls	8,809	13,169
Projected additional demand to 2036 (from est. 2018 levels)	11,267	11,267
Difference (capacity – d emand)	-2,458	1,902
Feasible development capacity (feasible and marginally feasible)	6,424	10,784
Projected additional demand to 2036 (from est. 2018 levels)	11,267	11,267
Difference (capacity – demand)	-4,843	-483
Feasible development capacity (feasible and marginally feasible)	6,424	10,784
Adjusted DPIE projected additional demand to 2036 (from est. 2018 levels) – higher growth scenario	13,920	13,920
Difference (capacity – d emand)	-7,496	-3, 136

Gap analysis – assessing capacity and demand

- Overall, there is a notional gap of around 2,400 dwellings under the current controls.
- However, including the capacity identified for the Frenchs Forest Planned Precinct, there would be sufficient capacity to meet future demand.
- When factoring in the potential feasibility of development there is a deficit in capacity of around 4,800 dwellings, and a deficit of around 500 dwellings even when including Frenchs Forest.
- If the population and average household sizes in the adjusted DPIE projections are used as a sensitivity test – this shows a more significant deficit in feasible capacity of around 3,100 including Frenchs Forest (or close to 7,500 excluding the Planned Precinct).

	5
2	ć
2	2
2	2
c	2
2	ð
8	L
1	J.
2	2
9	2
v	2



Gap analysis - take up by dwelling type

- It is important to consider the gap between the notional capacity and demand in terms of the feasible capacity as this illustrates the development that is likely to occur under current controls. If the capacity is insufficient, it suggests that something may need to change in the planning controls to be able to accommodate future growth.
- The demand for different types of dwellings also needs to be considered, and the pace of take up for different housing types is also likely to vary. The table below illustrates that the existing feasible capacity for detached dwellings is likely to be exhausted sooner than semi-detached and apartment dwellings compared to the projected demand for dwellings in the LGA to 2036.
- The feasible capacity for detached dwellings would be exhausted by 2021. For semi-detached dwellings, the feasible capacity would be used up by 2026, and for apartments, before 2036.

		Projected additional demand	22		Remaining feasible capacity	12
Year	Detached	Semi-detached	Flat, unit or apartment	Detached	Semi-detached	Flat, unit or spartment
2018	e	Ð	65	127	424	5,873
2021	554	420	1,105	427	4	4,768
2026	380	650	1,620	-807	-646	3,148
2031	660	720	1,890	-1,467	-1,366	1,258
2036	700	750	1,980	-2,167	-2,116	-722

NOTE

SGSEP.COM.AU



- The analysis suggests that the LGA has some existing capacity, and additional opportunities to increase housing could be considered over the longer term (10+ years).
- While not in the current planning framework, there a number of proposals that are also being investigated that could increase housing capacity, including:
- Ingleside release area
- Previously identified for 3,400 dwellings, however, this number is likely to be scaled back significantly due to bush fire risks.
- Draft Brookvale Structure Plan
- Currently in draft format
- Proposes 60 per cent of growth around Brookvale to be employment based, and 40 per cent housing based.
 - Identifies potential for additional 670 dwellings and increase of 1,200 residents.
- Potential for 50,000 square metres of commercial floorspace and 1,700 jobs.
- Application of Low Rise Medium Density Housing Code
- Intended to increase housing supply and improve housing affordability. Northern Beaches deferred from applying the policy until 31 October
 - 2019.

Image: Section of the section of th

ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019



40

Source: DPIE, 2016:



Implications for housing strategy

The evidence base and analysis has highlighted key issues that have implications for the development of a local housing strategy for the Northern Beaches. Implications include:

Changing demographics

- Changing housing demand relates to an ageing of the population and an increase in couples without children, combined with affordability issues in households accessing their preferred housing types and the need to look for smaller housing options.
 - The housing demand analysis is projecting growth in demand for semi-detached forms of housing, as well as strong demand for housing with four bedrooms or more. As the latter will not able to be met with additional detached housing development, it is likely that this will drive increased semi-detached housing forms as well as larger apartments.

Housing affordability

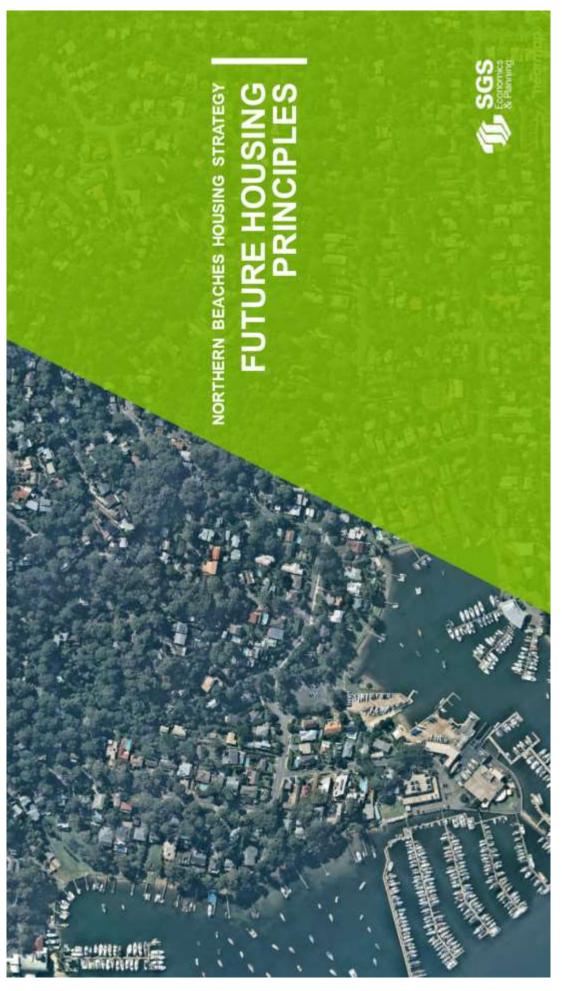
 There is a significant unmet demand for social and affordable housing, with many households being in housing related financial stress. This is projected to grow by an additional 2,000 dwellings over the 20-year period.

 The affordability of housing across the Northern Beaches has declined, with the increase in rents and house prices across many areas of Sydney. The Northern beaches housing is severely or extremely unaffordable for many renters.

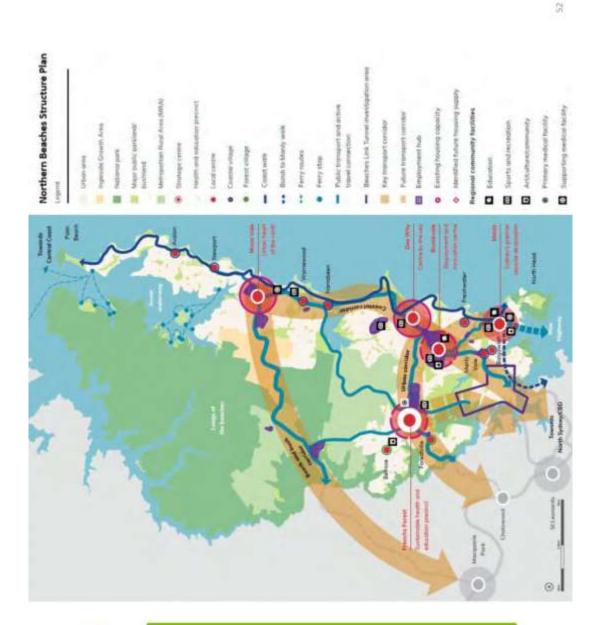
Housing capacity

- With the projected demand for housing, the current planning framework in the Northern Beaches does not have enough capacity to accommodate 20 years of housing growth and demand.
- With the rezoning of land for higher density residential at Frenches Forest as part of the health and education precinct, there will be notionally sufficient capacity for 20 years housing supply.
- However, the current planning framework is currently not best addressing the need for more diverse housing choices, including more medium density attached housing forms. This diversity of choice will be important to address firstly the changing needs of the population, but also to provide more affordable smaller housing options to help address the declining housing affordability.









Northern Beaches LSPS

'In 2040, the Northern Beaches has a stunning coastal and bushland environment, enriched and contemporary coastal characte and better connections to the North District and the rest of Greater Sydney. The natural environment is healthy and protected and highly valued by residents and visitors alike. There is a range of housing to eccommodate our whole community and we continue to pursue design excellence and ustainability outcomes in our built form. It offers a thriving local economy and a sustainable mix of employment and industrial lands and vibrant and enlivened centres. Our healthy and active community can easily access artistic, creative, sporting and recreational opportunities and the services and facilities that support their health and wellbeing."



Government role in housing policy

- Many areas of housing policy relating to housing demand and supply are the responsibility of Commonwealth and State Governments.
- in general, the Commonwealth government has responsibility territory governments have responsibility for housing supply, for matters that relate to housing demand, while state and including local government's role in housing supply and regulation.
- areas of local planning and management for housing supply, The local government role in housing policy relates to some primarily regulating private sector housing delivery.
- This hierarchy is summarised on the right.

- Housing demand impacted through population/migration policies as well as taxation and benefits for housing investors .
- Social housing investment through National Housing and Homelessness Agreement (for social housing providers), National Housing Finance
 - Commonwealth private rental assistance as part of welfare payments Investment Corporation (for community housing providers) .
- Infrastructure investment in partnership with states and territories -Including National Housing Infrastructure Facility to fund critical infrastructure for housing delivery .

- Public and community housing provision and management .
 - infrastructure provision (transport, education, health etc) and investment, including low cost loans for local government •
- and use planning legislation and framework, including regional and infrastructure
 - district planning and requirements for LG
 - Major development (panels) •
- Property taxes (including stamp duty on transfer) •

- Local land use planning and zoning .
- Local development standards and regulation .
- Local infrastructure provision
- Inclusionary zoning for affordable housing
- Redevelopment of Council property assets Advocacy and demonstration



Local government role in housing policy

In developing a vision and strategy for the Northern Beaches LGA, the opportunities for action for local government relate the following roles:

- Planning for housing location, including land use zoning through Council's Local Environmental Plan
- Local land use planning, including zoning of land (i.e. in LEPs) that regulate the location, quantity and type of housing, affecting housing supply and choice
- Establishment of development control standards that regulate the form and density of housing provision (i.e. LEP and DCPs)

.

- Land use planning for the Northern Beaches needs to comply with Regional and District Strategic Plans as well as state policies
- Regulation of local development and building, including assessment of development applications, although regulation of major development may be by state panels, as well as compliance
- Local infrastructure provision, which affect accessibility, amenity and liveability for housing.

SGSEP.COM.AU

- Establishing development contributions requirements or agreements that require development to contribute to the provision local infrastructure and facilities, that would impact the cost of housing
- Establishment of inclusionary zoning requirements for affordable housing, that would add to housing supply for lowmoderate income households
- Potential use and development of Council property assets, which may include provision of affordable housing
- Advocacy and partnerships including demonstration of best practice and design quality as well as partnerships with public and private land owners and developers, that may achieve public benefit relating to housing supply
- Establishing rates to be paid on property with collection of council rates, that may impact on housing costs, including rents.



The Housing Principles for the LGA are:

- Housing in the Northern Beaches LGA will respect the heritage, environment and local character and make use of the existing urban footprint for additional housing.
- New housing will be of a high quality, deliver greater diversity of housing choices for smaller households, accommodate an aging of the population as well as encouraging provision of a range of more affordable housing opportunities.
- Planning for housing supply will establish sufficient capacity within zoned land for the Northern Beaches to accommodate future (20-year) housing demand as the population grows as well as housing needs change.
- New housing will be located in and around existing and planned centres with good accessibility and walkability, and align with the provision of critical transport and other infrastructure.
- Housing design and form will be sustainable, and delivered with a focus on maintaining the relaxed character and environmental qualities of the Northern Beaches.
- Affordable rental housing supply on the Northern Beaches will be increased through inclusion within, and contributions from, new development.
- Advocacy and partnerships will encourage the renewal and expansion of the supply of social housing for low income and special needs groups in the Northern Beaches community.











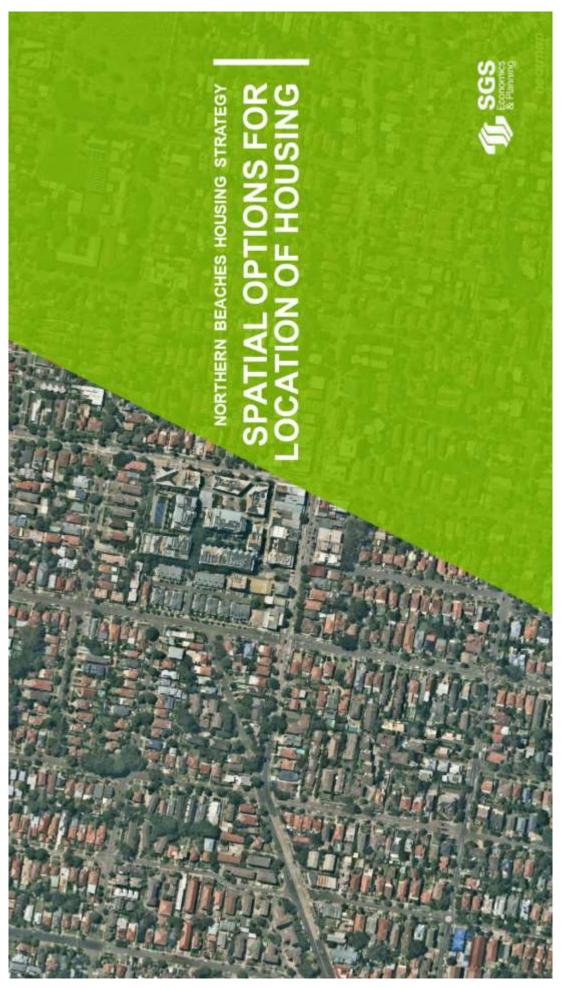
3

Developing a housing strategy

- The development of a local housing strategy, would be focused on the following main policy areas:
- Housing supply capacity and targets this will include planning for sufficient housing supply for the next 20 years as well as identifying for the GSC a housing target for 6-10 years (current 5-year target from 2016).
- Planning for a diversity of housing types this will involve providing opportunities for a mix of smaller housing types to suit various community needs including considering housing affordability.
- Planning for the location of new housing this will involve focusing new housing growth within walkable access of centres with good access to frequent public transport as well as retaining opportunities for lower density neighbour hoods.
- Setting development standards this will involve ensuring that new housing is high quality, well designed and responsive to local character as well as being sustainable.
- Affordable housing supply this will involve considering opportunities for increasing the supply of social and affordable housing for low income and special needs households.
- Advocacy and partnerships relating to areas where other levels of government are responsible, and also potential partnerships for demonstration projects.
- The spatial options for location of new housing is a key part of and local housing strategy, options for which are discussed in the next section.







Spatial options for location of housing

- element of local government's role in planning locally for he options for spatial location of housing are a core uture housing supply.
- redevelopment and for the replacement of existing houses NSW Government strategies outline the most appropriate ocations for new dwellings, including for high-density with villas and townhouses. Locations which:
- Are accessible to jobs and services,
- Are near railway lines and other public transport services,
- Are pleasant to walk around, with services and shops within a reasonable walking distance,
- Are near significant infrastructure investment which creates opportunities for housing redevelopment, or
- Contain concentrations of social housing which could benefit from redevelopment to provide newer housing close to transport and jobs.
- due to the significant environmental constraints associated greenfield land for housing is not being considered. This is At this stage, an option which prioritises the release of with development of many parts of the LGA, such as ingleside, including significant bushfire risks

- Housing options that could be considered for the Northern Beaches Housing Strategy include:
- Æ
- Current approach retention of the existing planning framework, with the addition of the French's Forest Planned Precinct.
- the five key centres, focusing on diversifying dwelling centres – development promoted within and around Concentrated urban renewal in and around strategic mix and more medium and higher density housing.

- medium density development is encouraged around Dispersed urban renewal in and around all centres smaller centres in addition to higher density for major centres.
 - encouraged around key current and future public ransport-centric renewal - development is transport infrastructure (the B-Line).
- options for greater diversity and smaller housing options in low density residential areas, while Missing middle' housing diversity – increasing ocating medium density around centres.

144

Or a combination of the above options.



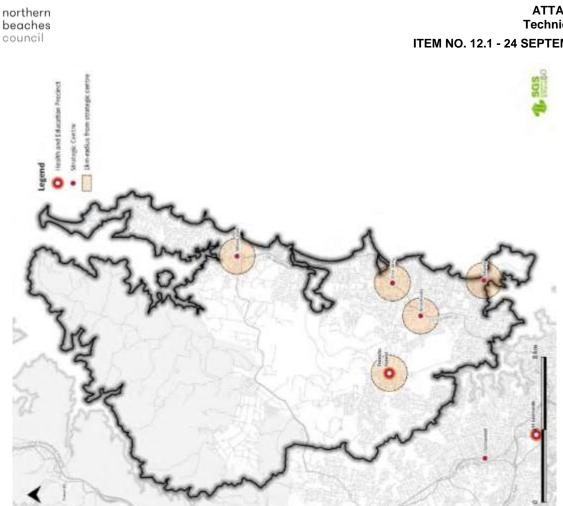
Why we are looking at spatial options for housing

- As discussed earlier in this Issues Paper, there are a number of key issues related to housing facing the LGA, including:
- A lack of affordable housing in terms of both social housing and affordable rental housing
- Limited housing diversity in many parts of the LGA further contributing to housing affordability issues
- Changing demographics in the population creating a need for different housing types compared to what is currently available, particularly as people age
- Potentially limited capacity for additional housing to be developed over the longer term (15+ years)
- The need to retain the Northern Beaches' existing qualities including the natural environment, while accommodating future housing demand and projected population growth.
- Addressing all of these challenges may not be possible under the current approach – where the existing planning framework is retained, and where the only major source of new housing capacity is the Frenchs Forest Planned Precinct.
- SGSEP.COM.AU

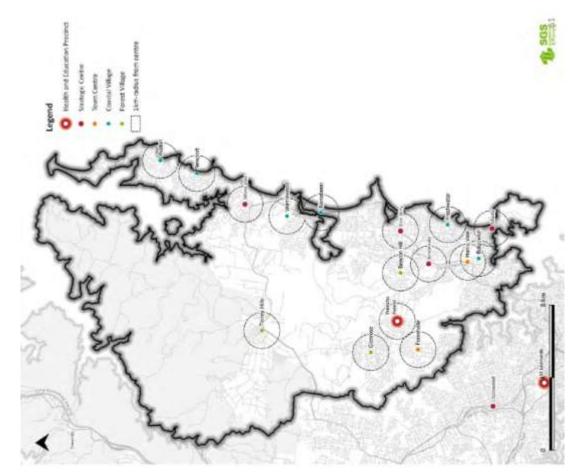
- To be able to address these issues, the range of options identified above could be considered. These options provide opportunities to deliver greater housing diversity, with housing types that are capable of meeting the changing needs of the population, as well as increasing the LGA's capacity to accommodate new dwellings in appropriate locations with good access to transport and services.
- Each of the options is discussed in more detail in the following pages.



- strategic centres of Dee Why, Brookvale, Manly, Mona Vale, dwelling mix concentrated around the Northern Beaches' This option would see housing growth and a diversified and Frenchs Forest.
- This will provide opportunities for the incorporation of future additional housing for people to live near where they work, and be close to services and transport.
- Elements of the concentrated urban renewal option include:
- Review 'mixed use' zones in strategic centres, for inclusion of higher density housing types, with retention of min FSR for non-residential to maintain capacity for future town centre growth
- with high access. This would use an R4 high density residential zone, residential areas in lands immediately adjoining town centres and Identify opportunities for introduction of a 'core higher density with opportunities for increasing heights.
- redevelop at sufficient densities to support housing as part of the Ensure core housing areas for higher density residential only strategic centre
- for Mona Vale strategic centre, that respect the 'village' character of dentify a form of housing for any mixed use and core housing areas this centre
- Identify opportunities for medium density 'mixed housing' areas in accessible locations with high amenity within the walkable catchment of strategic centres.







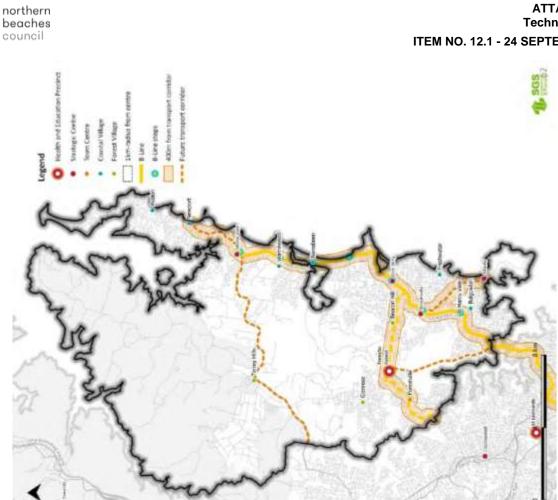


Dispersed urban renewal

- Medium density housing forms within the village centre where there are opportunities to integrate renewal with the existing village character.
 - Focus on housing diversity and develop greater housing choice that can support the population as demographics changes, including allowing for residents to be able to age-in-place.
 - Investigate opportunities for rural and hinterland villages to increase housing choice, such as Terrey Hills, Glenrose and Beacon Hill, while considering environmental constraints.

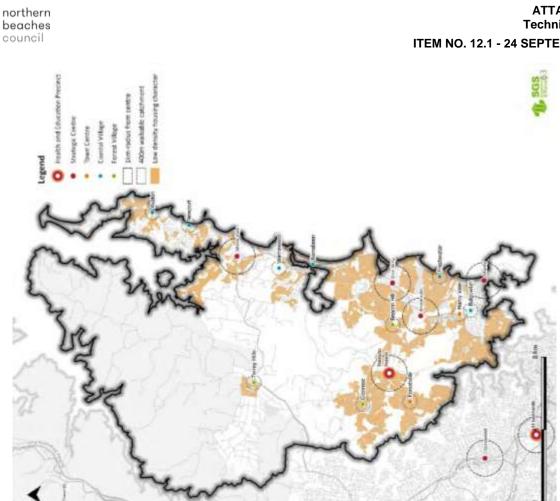
Transport-centric renewal

- corridors, including the existing and proposed B-Line This option would see renewal focused around current and future public transport stops and routes.
- existing B-Line to Mona Vale, and the proposed B-Line This would only consider renewal in areas with high evels of accessibility to the B-Line, particularly the route between Dee Why and Chatswood.
- Opportunities for additional housing in this corridor in close proximity to B-Line stops would be investigated. These would include:
- Potential B-line stops including Beacon Hill as well as at Warriewood
- Town centres identified in the dispersed urban renewal option at Manly Vale and Forestville.



'Missing middle' housing diversity

- Seek exemption from the medium density housing code based on a Northern Beaches specific approach to addressing housing diversity
- Elements of the housing diversity option include:
- Allow attached and detached dual occupancy, into residential low density zones city-wide, with a minimum lot size of 450sqm.
- (i.e. villas) with a min lot size of 600sqm as infill redevelopment in centres, and allow attached (i.e. terraces) and multi-unit housing Define 'Centre Influence' areas within the walkable catchment of currently low density residential zones.
 - environmental or character constraints should limit infill Identify 'Environmental Living' areas city-wide, where development.
- ensure attached and multi unit housing retains deep soil zones and Prepare development standards for 'centre influence areas' to vegetation as a part of the character of these areas
- renewal option that would also promote medium density housing (i.e. R3 medium density residential zone) located This option would work well with the dispersed urban around local centres.



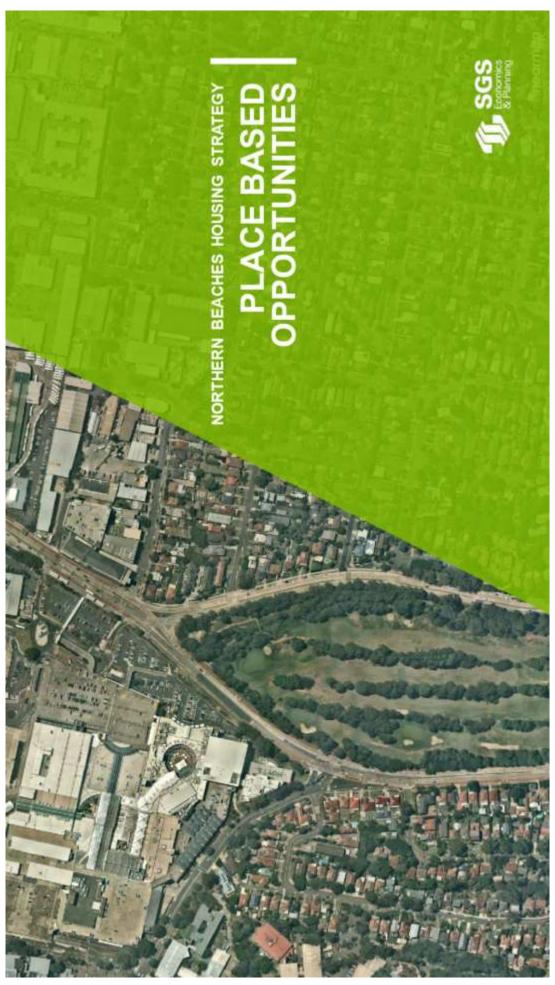


1.14

Discussion of spatial options

The currentspanning instrumout na sufficient capacity in the short and medium term to accommodate housing growth targets. The resconing of the Frenches Forest Planned Precinct as part of the Health planned Precinct as part of the Health additional housing capacity. The planned precinct will provide a	• • • •	Dispersed renewal The opportunity for additional housing dispersed around a narge of local centres would address housing diversity and choice broadity across the LGA. The focus would be on introduction of medium density forms within walkable catchments of local centres, and a more limited focus on higher density housing forms in the maxed use particularly in the town centres of	Transport centric Aligns with location of housing in dose proximity to B-Line public transport access – existing and new. Opportunities and new. Narrabeen due to environmental concests in the new B-Line east-west from Dee Why to Christwood due to topography– with the main	
Additional (capacity at) grated in maked use zones, such as Dee Why The wider furensity and demand for The wider range of medium density housing forms may not be adequately addressed by this option There is considerable variation in the approach to residential zones within the existing LEPs.	 Recokvale, due tothe significant The opportunities for redevelopment of housing forms in and around dee Why to care The opportunities for redevelopment of housing in Brookvale are limited by the current industrial lands and shopping mall major land uses. The strategic centre of Mona Vale has a village character that is valued and the retrategic centres should be included in any housing around strategic precincts for long team mounting (port 20 year strategy) and in the short to medium term focus or housing (port 20 year strategy) and in the short to medium term focus or housing (port 20 year strategy) and in the short to medium term focus or housing (port 20 year strategy) and in the short to medium term focus or housing the subject to minage to the strategy centres will be subject to minage this inverse. 	Constructions and the firmited in village locations that there poor access to the public transport spine of the B-Line as well as character constraints. Village housing options would need to be developed that reflect character – and whether opportunities more than shop top housing will be able to be integrated. The rural village of Terrythils may not be appropriate for increasing housing doe to constraints and accessibility. Planning would need to retain within the mixed us planning framework protection of data to doe protection of data to the mixed to be appropriate for increasing housing doe to constraints and accessibility. Planning would need to retain within the mixed us planning framework protection of data to the short focus on housing diversity in the short to medium term with longer term to medium term with longer term	Plarned Precind. Minor opportunities for some housing diversity at a number of other Buine stops or potential stopa. Focus on Mahly Vale, and Brodsvale opportunities as per the discussion of concentrated or dispersed urban renewal. Broader corridor development along main roads, often has poor amenity outcomes. Significant density increases for housing atrategy based on analysis of housing demand and growth.	







Place-based opportunities

- This section outlines a Centres Renewal Framework which sets up the principles for planning for places within the Northern Beaches LGA.
- The Framework discussed on the following pages, but in general it applies a number of different housing precincts in and around a centre within the walkable catchment. The criteria for their application is outlined.
- that could be considered for additional housing, and the type of housing that could be included in urban renewal, to allow the This approach allows for the identification of potential areas potential impacts on housing capacity in the LGA to be determined.



Source: Low Rise Medium Density Design Guide



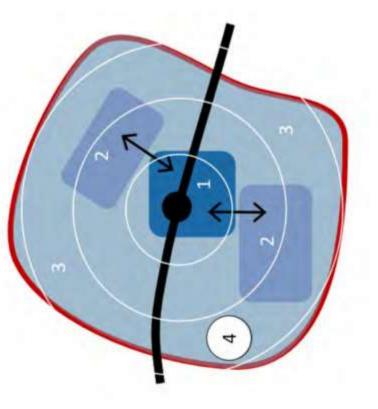
ource: Shed Architects and Terence Yong Architecture





Explaining the centres renewal framework

- The Centres Renewal Framework is a way of thinking about the approach to zoning and housing types around centres and transport infrastructure.
- The framework is based on four components:
- 1. Centre core (housing)
- 2. Mixed housing areas
- 3. Centre 'frame' or influence area
- 4. Excluded areas and areas outside the centres frame (e.g. existing strata development, or a heritage item).
- For each component, the aim is to define the desired character and potential controls that could apply.





Application of the centres renewal framework

Each of the components can be defined as follows. The following page discusses how this could be applied in the Northern Beaches. ٠

	1. CENTRE CORE		2. MIXED HOUSING AREAS	3. CENTRE "FRAME/INFLUENCE AREA	4. EXCLUDED AREAS
11.10.10.000	Highly accessible to the town centre (81-3) zoned		Targetted areas within extended 800m-1.km	 Remaining areas within 1- 1.5km (an 'extended' 	 Hentage conservation areas
1.00	areas, largely within 400m walking		catchment where street and block layout are better	walking catchment) of centres, subject to	Environmental constraints Other (for example outside
	Housing typology for more	_	suited to intensification.	topography.	centre frame is there a min.
100	Intensive forms of housing,	-	Housing typology for	 Typology of small scale infill house another such as 	lot size for dual occupancy)
100	mood use (i.e. R4 zone).	_	(e.g. medium density	secondary dwellings	
-	identify sites that are	_	housing including	duplexes and potentially	
100	suitable for	_	townhouses, small-scale	low scale medium density	
	accommodating new	_	apartments, and forms	such as terraces on certain	
100	higher density forms of	_	requineg strata title) - R3.	sites (R2), with torrens title	
-	development, including	•	Promotes housing choice	ownership.	
171	existing R3 zones.	_	and transitional scale.	 Subject to character and 	
	Requires more detailed		Target areas with larger lot	built form controls.	
1.00	design studies and planning		sizes (greater than 600m2).	 Incremental and 'salt and 	
177.1	controls and possibly	_	and located with access to	pepper' change:	
1.00	infrastructure upgrades	_	services/facilities and	infrastructure upgrades	
1.1	and funding.	_	higher amenity (i.e. near	generally not required.	
-	Land assembly or	_	perkland).	 Modest infill development 	
	development of key sites	-	Also require some detailed	easy to facilitate, likely to	
	may be required as	_	design, possibly	be feasible compared to	
	catalysts for broader	_	infratructure upgrades,	higher density forms.	
12712	change,		land assembly may be advantageous but not		
		_	the second		

ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

3

High amenity areas less less like detached dwellings. Typologies including semi- traces, manor houses and low-rise multi-unit development. Smaller contribution towards increasing housing development. Contribution towards increasing housing development contribution towards increasing housing development de	Mixed housing	n	3. Centre influence		4. Excluded residential lots
 The contrage a diversity of the menity area lass in the wider housing is a diversity of the menity area lass in the wider area marking the set of the menity area lass in the wider area marking the set of the menity area lass in the wider area marking the set of the set of the menity area lass in the wider area marking the set of the set of the menity area marking the set of the set of the menity area marking the set of the set of the menity area marking the set of the menity area marking the set of the menity area marking the set of the set of the menity area marking the set of the set of the menity area marking the set of the menity area marking the set of the set of the menity area marking the set of the set of the menity area marking the set of the				Transformer in drug an another	
 A standary housing and density housing and density housing several and density housing several and and density housing targets of 15m housing several and accupancy (<i>Harrace and build</i>) housing targets a development. A standary and a standary and and accupancy (<i>Harrace and build</i>) housing targets a development. A standary handar A standary and a standary and and accupancy (<i>Harrace and build</i>) housing targets and and accupancy (<i>Harrace and build</i>) housing targets a development. A standary handary and a standary and and accupancy (<i>Harrace and build</i>) housing targets and and accupancy (<i>Harrace and build</i>) housing targets a development. A standary and a standary and a standary and and accupancy (<i>Harrace and build</i>) housing targets and and and accupancy (<i>Harrace and build</i>) housing targets a development. A standary and a standary (<i>Harrace and build</i>) housing targets and and accupancy (<i>Harrace and build</i>) housing and and accupancy (<i>Harrace and build</i>) housing and (<i>Harrace and build</i>) housing and (<i>Harrace and build</i>) housing and (<i>Harrace and build</i>) housing at a standary and (<i>Harrace and build</i>) housing at a standa	High amenity areas likely to	Encourage a diversity of	High amenity areas less	detached dwellings.	Areas with low likelihood of amaleamation or future
pool accessibility to as well as terrace and the catchment B00m. as well as terrace and combinions attached be catchment B00m. as well as terrace and combinions attached be catchment B00m. bow rise multi-unit constrations for dual occupancy/ferrace or dual occupancy/ferrace or dual occupancy/ferrace or dual occupancy/ferrace or dual occupancy/ferrace or actiment for dual occupancy/ferrace or actiment of dual occupancy/ferrace or actiment for adual occupancy/ferrace or actime for adual occupancy/ferrace or actiment for adual occupancy/ferrace or actime for adual occupancy/ferrace or actime for adual occupancy/ferrace or actime for adual occupancy/ferrace or antiger for adual for adual	medium density housing	a maximum of 3-4 storeys.	medium density housing	terraces, manor houses and	development - including
es (within the wider to dual occupancy/terrace in:(3066.850200000000000000000000000000000000000	with good accessibility to	as well as terrace and	but still within the walkable		sites with heritage or strata
ble catchment 800m- ble catchment 800m- In digrassion of the transmission of the tra	centres (within the wider	townhouse attached	catchment	1	constraints
multiple The structure Or dual occupancy/france multiple Constribution towards For dual occupancy/france core with limited Nin. 24m street frontage Cortispancy/france ge or strata Nin. 24m street frontage Cortispancy/france ge or strata Nin. 24m street frontage Cortispancy/france anita to development Ans swith generally larger minitation development Contribution towards anitation development Ans swith generally larger anitation development Ans swith generally larger anotion development Ans swith generally larger anotion development Ans swith generally larger tial to rescore some contral docal Ans swith generally larger tial to rescore some contral docal Ans swith generally larger tial to rescore some contral docal Contral docal tial to rescore some contral docal Contral docal transponder contral docal Contral docal to rescore some generally within 1- Listence meed for torestore some generally within	walkable catchment 800m-	housing typologies	Smaller contribution	 Min. street frontage of 18m 	Areas with environmental
Tor dual coupancy/tarrace capacity/targets development to dual coupancy/targets to dual coupancy/targets to dual coupancy/targets to dual coupancy to the space of the space o	1km)	Min. street frontage of 18m	towards increasing housing		anticomments fruits tons
An arready and the second of the second o	Areas in close proximity to	tor dual occupancy/terrace	capacity/targets	dwelling development	Focus on maintenance of
Anti-control Increasing housing diversity, to reduce need for more increasing housing divelopment, to respecting existing existing (to reduce need for while respecting existing virthin 1- 1.5km radius of centre core: for strategic and local cortes cortes cortes cortes for strates contraints. Areas with limited heritage or strate constraints for strates for strates for strates of the strates for strates of buildings, landboaping etc. 5. 4. storey 4. storey A. storey	centre core with limited	Min 74m street fraction .	Contribution towards	•	existing housing character
development to reduce respecting example to reduce respecting example development inglebruintional maiggmentional regety concerts amaiggmentional s. 1.5km radius of centre centre amaiggmentional 1.5km radius of centre centre amaiggmentional 1.5km radius of centre centre amaiggmentional 1.5km radius of centre centre centres centres Largety zoned as R1 centres centres reast with imitted heritage arata constraints centres setback, height of buildings, landscepting etc. controls to reflect prevailing inclusion inclusion controls to reflect prevailing inclusion 1.5km radius for o. FSR 0.7.1 for o. FSR 0.7.1 Tense Manor house Duplier Single detect	heritage or strata	for anothment dualling	increasing housing diversity		 Areas generally further
4 stored Amagementory Amagementory neighbourhood character Lister activity within 1: 1.5th radius of centre 1.5th radius of centre cores for strategic and local Largely zoned as R2 centres Largely zoned as R2 centres strategic and local centres Largely zoned as R2 centres strate constraints centres Largely zoned as R2 centres strate constraints centres Areas with limited heritage anagementons strate constraints centres Setted Largely zoned diaracter of strate constraints strate centres Setted Largely bourhood character of storeys storeys storeys ferrace Manor house Diplex Diplex Single detected	constraints to	development	writter responsing extenting		away from centre – outside
 A frees generally within 1- 1.5km radius of centue correction of centue correction of centue correction of centue correction of centue correction of centue correction correction centures Lagely zoned as R2 correction corection corection correctio	redevelopment		iowel density	amaigamations)	of walkable catchments
1. Skin radius of centre 1. Skin radius of centre cores is strategic and local centres centres Largely zoned as R2 centres centres argely zoned as R2 centres centres argely zoned as R2 centres centres Areas with limited heritage or strata constraints setbacks, height of buildings, landscaping etc. controls to reflect prevaiing reighbourhood character of 2:3 storeys Approx. FSR 0.71 Terace Manorhouse Anote buildings, landscaping etc. controls to reflect prevaiing reighbourhood character of 2:3 storeys . Approx. FSR 0.71 . Approx. FSR 0.71 . Manorhouse . Duplex detected	Potentially a large		freignbournood character Areas senerally within 1.		
4 storey 4 storey 4 storey 4 storey 4 storey 4 storey 4 storey 4 storey 5 storeys 5 storey	contribution towards		1 films radius of souths		
 4 storey 4 storey 4 storey 4 storey 4 storey 6 dental 7 dental 7 dental 8 d	increased housing		cores for strategic and local		neighbourhoods
 Largely zoned as R2 currently Areas with limited heritage a setbacks, height of buildings, landscaping etc. controls to reflect prevailing neighbourhood character of 2:3 storeys Approx. FSR 0.7:1 Approx. FSR 0.7:1 Andre house Andre house Duplex Single detect 	capacity/housing targets		centres		 Areas with an existing R2
4 storey 4 storey 1 dental	Includes existing R1, R2, R3,		Largely zoned as R.2		zone
Areas with limited heritage or strata constraints setbacks, height of buildings, landscaping etc. controls to reflect prevailing neighbourhood character of 2-3 storeys 2-3 storeys 2-3 storeys Approx. FSR 0.712 Approx. FSR 0.712	BS zones		currently		 Typologies primarily single
 cratata constraints Setbacks, height of buildings, landscaping etc. controls to reflect prevailing neighbourhood character of 2-3 storeys Approx. FSR 0.711 Approx. FSR 0.711 Amor house Amor house Buplex 	Potential to rezone some		Areas with limited heritage		detached houses, with
 Setbacks, height of buildings, landscaping etc. controls to reflect prevailing neighbourhood character of 2-3 storeys Approx. FSR 0.711 Approx. FSR 0.711 Approx. FSR 0.712 	existing R2 zoned areas to		or strata constraints		attached and detached dual
buildings, landscaping etc. controls to reflect prevailing reighbourhood character of 2-3 storeys Approx. FSR 0.711 Approx. FSR 0.712 Approx. FSR 0.712 Appr	R3	*	Setbacks, height of		occupancies, of up to 2
Controls to reflect prevailing reighbourhood character of 2-3 storeys Approx. FSR 0.71 Approx. FSR 0.71 Appr	Areas with generally larger		buildings, landscaping etc.		Access DOD ALL DOL
2-3 storeys 2-3 storeys Approx. FSR 0.71 Approx. FSR 0.71 Appr	lot sizes 1,200sqm-		controls to reflect prevailing		Min lot size and frontage of
2.3 storeps Approx. FSR 0.7:1 Approx. FSR 0.7:1	4,000sqm (to reduce need		neighbourhood character of		The for dual occurator as
Approx. F3R 0.73 Approx. F3R	for amalgamations)		2-3 storeys		well as min. deep soil
3-4 storey residential	Approx, FSR 1:1		Approx. F5R 0.7:1		planting and controls on car parking and access
3-4 storey residential		E			_
3-4 storey Terrace Manor house Duplex		1 14			T
2-4 5100 cg residential	-	Ĩ.	-		1
		tial		Cupiex	etato iea



1. Centre core

N

- Areas at the core of centres . within easy walking distance than 400m) .
- Higher density development mixed use/shop top housing and/or residential towers
 - Potentially includes existing areas zoned as B2, B3, B4,
 - areas to R4 if adjoining the Potential to rezone some B5, R3 and may change building density controls
- Higher density development to be limited to key suitable town centre
 - Larger scale development may require infrastructure upgrades sites .

podium

SGSEP.COM.AU



Application under the options

- The Centres Renewal Framework could be applied to strategic and other centres in the Northern Beaches LGA according to each of the options identified above.
- The centres targeted for housing growth would differ by option. The table on the following page illustrates the centres that could be considered under each.
- Note that some centres (such as strategic centres) could be targeted for renewal under all of the alternative options.

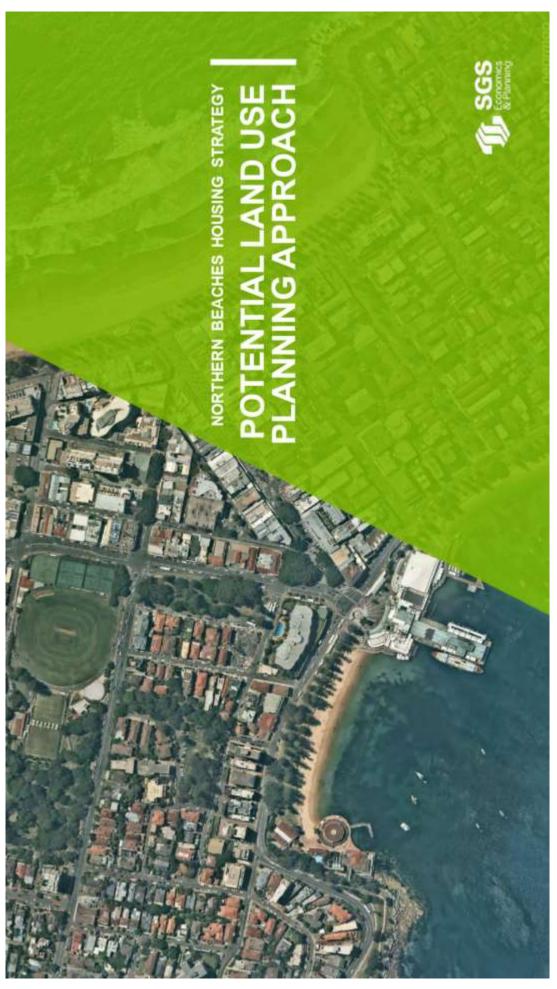


ource: 565, 2019



	¢				¥.¥
	Current approach + Frenchs Forest	Concentrated urban renewal	Dispersed urban renewal	Transport centricrenewal	Missing middle housing diversity
Dee Why		×	x	×	×
Brookvale		×	×	×	×
Manly		×	×	×	×
Mona Vale		×	×	x	×
Frenchs Forest	×	×	×	×	×
Forestville			×	×	×
Manly Vale			×	×	×
Balgowlah			×		×
Freshwater			×		×
Narrabeen			×	×	×
Warriewood			×	×	×
Newport			X	×	×
Avalon			×		×
Terrey Hills			×		×
Genrose			x		×
Beacon Hill			×	×	×
Out of centre locations					×







Developing a land use planning approach

- As discussed earlier in this Issues Paper, there are a number of key issues related to housing facing the LGA, including:
 - A lack of affordable housing in terms of both social housing and affordable rental housing
- Limited housing diversity in many parts of the LGA further contributing to housing affordability issues
- Changing demographics in the population creating a need for different housing types compared to what is currently available, particularly as people age
- Potentially limited capacity for additional housing to be developed over the longer term (15+ years)
- The need to retain the Northern Beaches' existing qualities including the natural environment, while accommodating future housing demand and projected population growth.
- When considering the range of options available to Council for the land use planning approach, an approach that focuses on increasing diversity of housing type to meet future needs, as well as providing longer term additional capacity would be appropriate.

SGSEP.COM.AU

A potential land use planning approach that would achieve the housing vision has been identified for discussion.



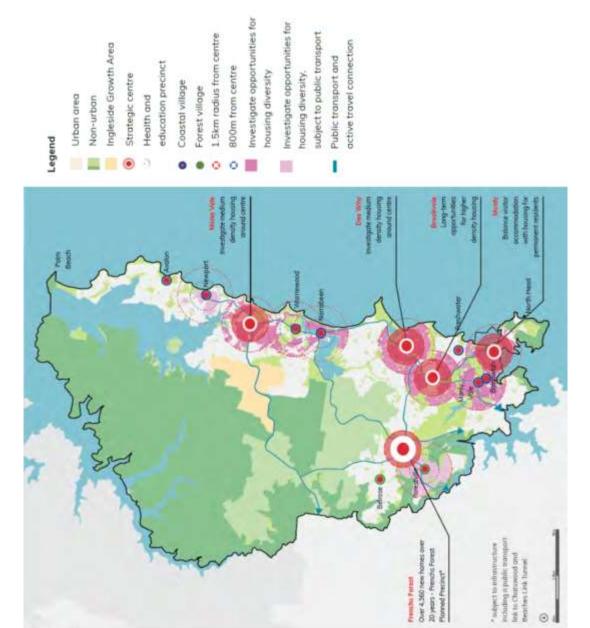
Potential land use planning approach

- This approach could be based on 'missing middle diversity' option, focused on addressing diversity of housing choice, affordability of housing and the longer-term capacity to accommodate growth.
- The map over the page illustrates the spatial application of this approach.
- exemption from medium density housing code. Additional investigation of options for future development could also be used as a basis to seek exemption from the seniors housing SEPP and boarding house provisions of the affordable rental housing With the elements in the table below addressing housing diversity, the strategy could implement the above and seek CEDD

issue Li	Land use planning approach
. Housing diversity	 Allow attached and detached dual occupancy, into residential low-density zones city-wide, with a minimum lot size identified. Change housing, permissibility in "centre influence" walkable catchment of centres, to allow a range of infil development within existing residential neighbourhoods (e.g. for example consider semi-detached, terraces, manor houses and low-rise apartment development in currently low-density residential zones). Additional mixed housing (medium density) areaslocated around centres, with good transport accessibility, with a focus in the short-medium term on strategic and local centres on the B-Line.
 Housing affordability 	 Seek additional affordable rental housing supply as part of the Frenchs Forest as one of the few opportunities for additional supply in the LGA. For example, through incorporation of greater than 10% dedication of additional affordable housing units (e.g. 10% = 430 units, 20% = 860 units) as value sharing of value uplift from any up-zoning. Establish a partnership with LAHC and Community Housing to provide additional supply of social and affordable housing.
Changing demographics and housing needs .	 Review development standards for medium density housing forms to ensure that redevelopment is feasible, accessible for older persons and/or has a mix of dwelling sizes suitable for families.
Need to retain existing qualities and character	 identify 'Environmental Living' areascity-wide, where environmental or character constraints should limit infill development. Prepare development standards to ensure attached and multi unit housing retains deep soil zones and vegetation as a part of the character of these areas.
Capacity constraints	 Investigate further the Brookvale Strategic Centre for additional higher density apartment development to be located longer term in the centre.



12



Potential land use planning approach



Low Rise Medium Density Housing Code

- An alternate option is to not seek exemption from the Medium Density Housing Code.
- The Low-Rise Medium Density Housing Code will allow for dual occupancies, manor houses, and two-storey terraces to be carried out under a fast-tracked complying development approval process.
- To comply, proposals must meet development standards and design criteria as outlined in the Low-Rise Medium Density Design Guide.
- The Code applies in areas were residential development is already permitted under the LEP in the following zones:
 - R1 General Residential
- R2 Low Density Residential
- R3 Medium Density Residential, and
- RU5 Village zones.

- The Code is intended to contribute to housing diversity and improving housing affordability by providing smaller homes on smaller lots, and to cater to a range of different households.
- A temporary deferral of the application of the Code is in place for many Councils including Northern Beaches until 31 October 2019, to allow for an independent review of the Code in these areas to be completed.



- The following pages outline the potential application of the Centres Renewal Framework in terms of building typologies that could characterize the 'mixed housing' and 'centre influence' areas.
- This is intended to give an indication of the potential character and density of these areas under an approach that focuses on increasing housing diversity with medium density concentrated around existing centres.
- Some typologies require certain conditions to be viable, such as minimum lot sizes or frontages, which means that they may not be applicable in all parts of the LGA.
- Architectus have provided inputs on the housing typology and design used in this Issues and Opportunities Paper.

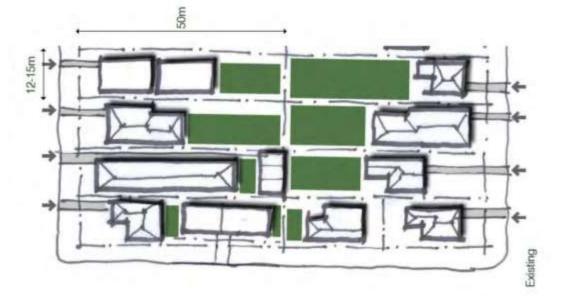
SGSEP.COM.AU



ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019









Existing condition

- Typical lot size 600 720sqm (require amaigamation) existing street frontage = 12m ï
- 12m frontage too narrow for basement parking
- Surface parking and driveways ï
- Loss of deep soil ï

Opportunities

- Amalgamate two lots to achieve a frontage of minimum 24m ł
- Improved privacy and amenity wider side settback ł.
- Opportunity for basement car parking ١
- Large communal open space ٢
- Single driveway 1
- 3 storey typology approx. 18 dwellings ٢ 1
- Potential FSR increase of 0.5 1 to 1.2 1

at the specific state

1

ļ

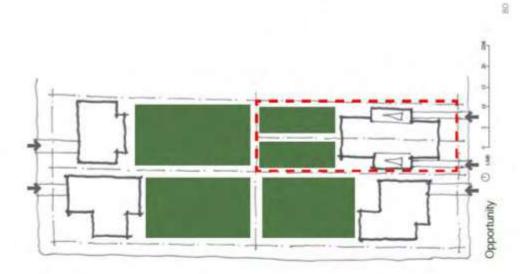


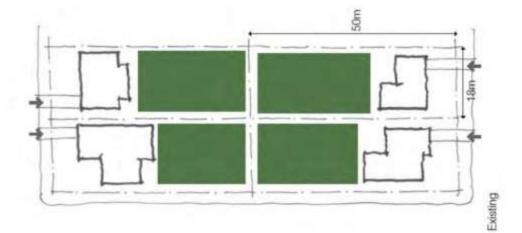
Ę.



Mixed Housing Precedents







Influence Area

Existing condition

- Typical lot size 900 sqm

Opportunities

- Lots with frontages over 15, but preferably 18m can be subdivided for side-by side attached dual occupancy
 - Potential FSR increase of 0.25.1 to 0.5.1

Issues

- Suits single garage only
- Streets can become dominated by garages and driveways.
- Edta driveway reduces street parking



northern beaches council

Existing condition

- Lot size 12 x 60 (720sqm)
- Lots typically too narrow to subdivide for side-by-side dual occupancy

1

Opportunities

Detached dual occupancy on battle-axe

Ŧ

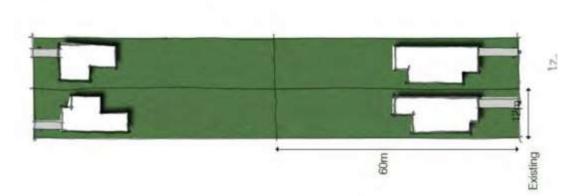
- FSR increase from 0.3 to 0.5.1
 - Single driveway

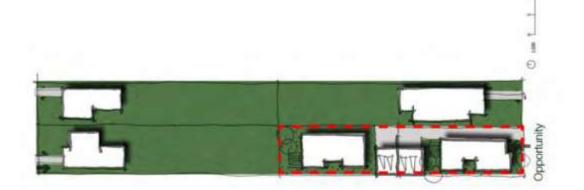
1

- Garages away from street on mid-boundary

Issues

- Front setbacks may be inconsistent with prevailing DCP
 - Privacy to front dwelling is compromised
 - Shared driveway complicates title



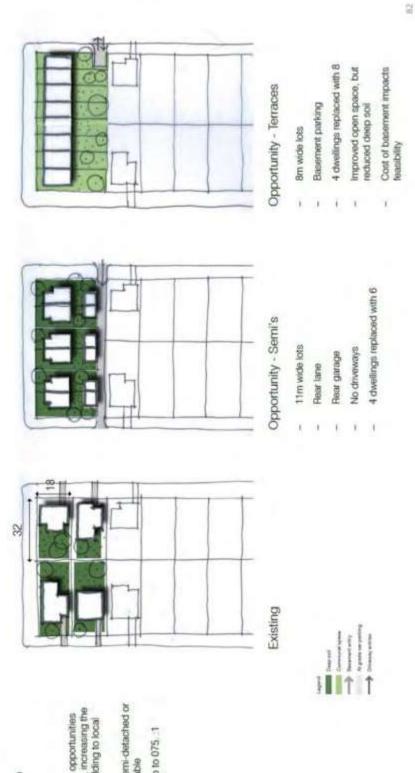




ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

青山のあ





Influence Area

Existing

- Typical lot size 576 sqm
- Typical street frontage 18m

Opportunities

- Corner lots present unrique opportunities for a number of typologies, increasing the diversity of housing and adding to local character
- Depending on character semi-detached or terrace houses are achievable
- FSR increase from 0.6.1 up to 075. 1



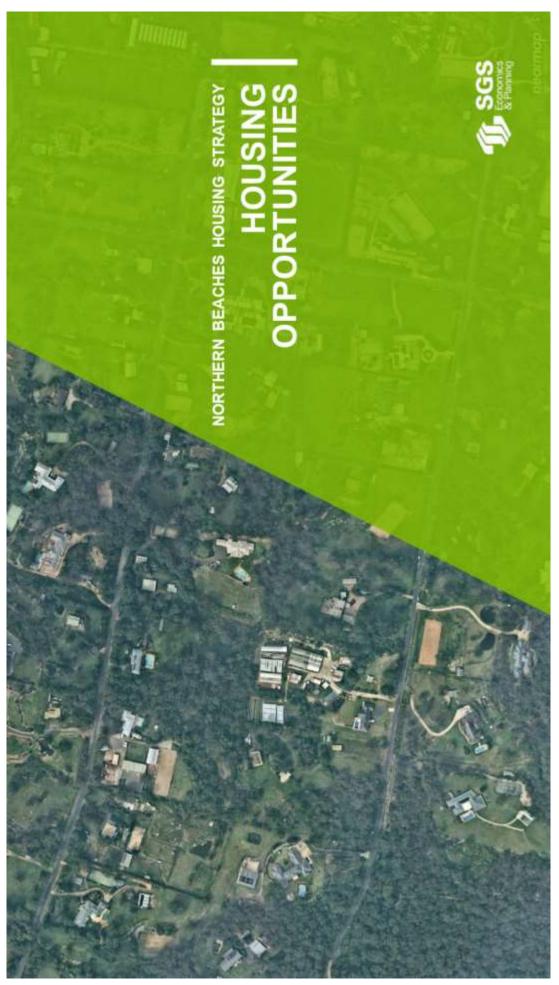
58



Influence area

Precedents





Housing opportunities

- Other housing opportunities relate to the policy areas for local government housing strategy. These broadly include:
 - Planning for a diversity of housing types
- Planning for the location of new housing
- Setting development standards
- Affordable housing supply
- Advocacy and partnerships.

Source: 565, 2019

SGSEP.COM.AU

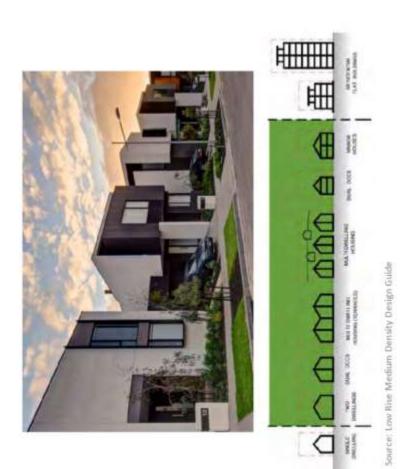








98



Opportunities – diverse housing choices

- Achieving greater housing diversity will be an important objective of a local housing strategy, in response to changing housing demand.
- This section further explores a range of housing types that could be considered in Northern Beaches from the NSW Government's Medium Density Design Guide.
- This also includes examples of mixed use and higher density housing forms.
- In addition, boarding houses, seniors living, and secondary dwellings can also add to the diversity of housing options available.



Housing typologies

- As noted previously, not all housing types will be able to be accommodated in all areas. The size and orientation of existing lots is an important consideration in the potential for the development of different housing types across the LGA. ٠
- The matrix below illustrates the typical lot size needed to accommodate different housing forms. The following pages show examples of different typologies that follow. .

			Lot Size	Size		
Dwelling type	450	009	800	1200	2500	5000+
Dual orangerices	0	0				
Manor homes		0				
Terrace housing		0	0	0		
Low mid infili apartments (4.6 storey)				0	0	
Low-mid mfll shop top (4-6 storey)	0	0	0	0		
Mic rise moved use on large lot (8+storey)					0	0
High density mixed use						0
Sentors housing				0	0	0
Athordable restal (eg secondary dwellergs & boarding houses)			0	0		

SGSEP.COM.AU



8



- Detached dual occupancies
- Potential in suburban areas with 450-650 sqm lots
- This typology works best on corner allotments, though can be achieved in side-by-side forms on larger sites.

CO

OF



EO

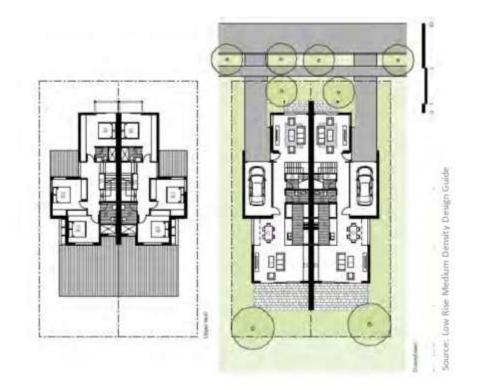
5

source: Low Rise Medium Density Design Guide

Source: Low Rise Medium Density Design Guide



68





source: Low Rise Medium Density Design Guide

SGSEP.COM.AU

Similar to detached dual occupancies, these work best on corner sites, however, can be achieved side-by-side with

suitable lot widths.

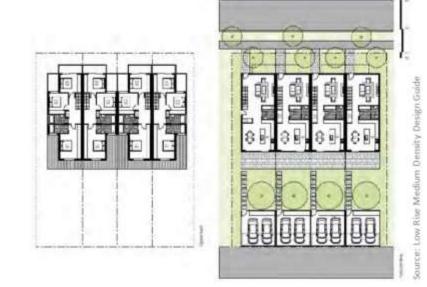
Potential in suburban areas with 450-650 sqm lots

Attached dual occupancies

Housing typologies



8





Housing typologies

٠



Streetscape can become dominated by Rear lare pariang a better outcome garages and driveways. Ermington Portman Street, Zetland

Source: Low Rise Medium Density Design Guide

SGSEP.COM.AU

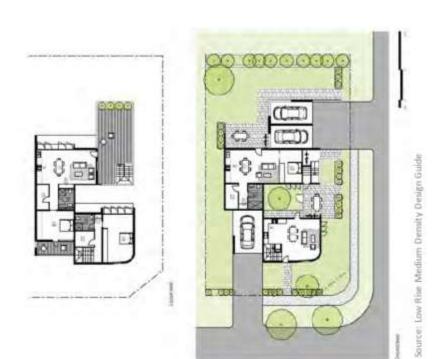


- Manor homes
- Potential in suburban areas with good access to public transport, on 600sqm+ sqm lots
- This typology can be achieved on non-corner allotments, though this can present challenges for the design of parking and the streetscape.



Source: Low Rise Medium Density Design Guids

SGSEP.COM.AU





ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

87 (5)



- Low-medium infill ٠
- 3-5 storeys, with 4 storeys less common due to feasibility and building code requirements. ٠



Source: Stanisic Architects, Waterloo, NSW

SGSEP.COM.AU



Source: Smart Design Studio, Potts Point, NSW





ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019



source: Smart Design Studio, Forest Lodge, NSW

6



- Low-mid rise infill apartments
- 4-6 storeys, potential near public transport



adria. NSM

ource:

Source: Smart Design Studio, Forest Lodge, NSW





8

ource: Allen Jack + Cottier, Balgowlah, NSW

Housing typologies

- Low-mid rise infill shop-top housing
- Up to 4-6 storeys, potential in local and strategic centres



urce: GROFI, Marily, NSW

Source: Melocco & Moore, Neutral Bay, NSW





5



SGSEP.COM.AU

Housing typologies



96

Housing typologies

- High density mixed use
- Potential on large regional shopping centre sites



ource: Architectus

Source: Architectus

SGSEP COMAU

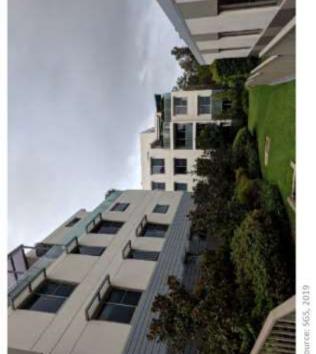


Affordable and diverse housing types – SEPPs

- housing is the application of NSW State Environmental Another consideration for the provision of affordable Planning Policies (SEPPs) and controls around where secondary dwellings can be located.
- Secondary dwellings are self contained dwellings that are established in conjunction with another (principal) dwelling, on the same lot of land, and attached or separate from a principal dwelling.
- SEPPs that related to affordable housing supply include:
 - State Environmental Planning Policy (Housing for Seniors or People with a Disability) 2004, and
- State Environmental Planning Policy (Affordable Rental Housing) 2009.
- The regulation of the development of secondary dwellings differs between the Northern Beaches' former LGAs.
- The current application of these SEPPs and controls across the LGA are illustrated in the following pages.

SGSEP.COM.AU











Secondary dwellings

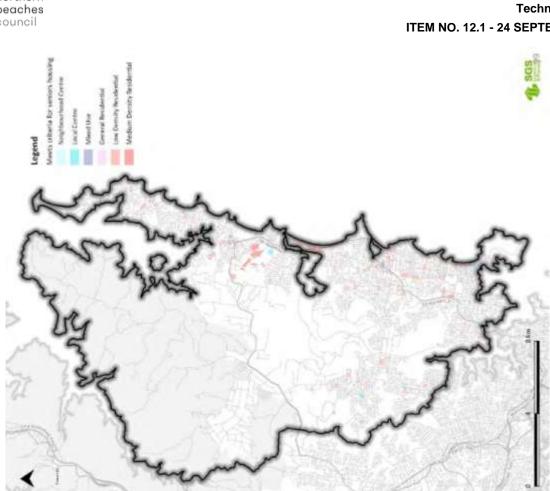
- The treatment of secondary dwellings varies between the current LEPs that apply in the Northern Beaches. ۰
- The zones where secondary dwellings are permitted varies between the former LGAs, as does the permitted size of secondary dwellings in relation to the primary residence on a site. ٠
- Secondary dwellings can be used to increase the diversity and density of existing areas. •

	Manly 2013	Pittwater 2014	Warringah 2011
Permitted use in zones	R1, R2, R3, E3, E4	R2, R3, R5, E4, RU2	R2, R3
Additional provisions for secondary dwellings	Floor area must not exceed whichever is greater of 60sqm or 30% of principal dwelling	s Floor area must not exceed whichever i greater of 60sqm or 25% of principal dwelling	area must not exceed whichever is Floor area must not exceed whichever is Floor area must not exceed whichever is ter of 60sqm or 30% of principal greater of 60sqm or 25% of principal dwelling dwelling
	Allowed if total floor area <75sqm and located within existing principal dwellin	Allowed if total floor area <75sqm and Allowed if total floor area <75sqm and Allowed if total floor area <75sqm and located within existing principal dwelling located within existing principal dwe	Allowed if total floor area <75sqm and Allowed if total floor area <75sqm and Allowed if total floor area <75sqm and located within existing principal dwelling located within existing principal dwelling located within existing principal dwelling

Housing for seniors and people with a disability

- Suitable sites under the SEPP must meet the following requirements, of being:
- inclusive). This public transport service needs to have a stop between 8am and 12pm per day and at least once between 12pm and 6pm each day from Monday to Friday (both days Within 400 metres of public transport that is available both to and from the proposed development at least once within 400 meters of a centre. ł.
- Not within bush fire prone land.
- Minimum lot size of 1,000 square metres, and minimum site frontage or 20 metres.
- A high level analysis has been completed to understand the part of a DA process). Suitable sites are dispersed across strategy (and should not be used for identifying sites as potential location of this housing form for the housing the LGA, and concentrated in particular areas.
- There are a limited number of sites identified in the more rural parts of the LGA, where it is also not as accessible.

SGSEP.COM.AU

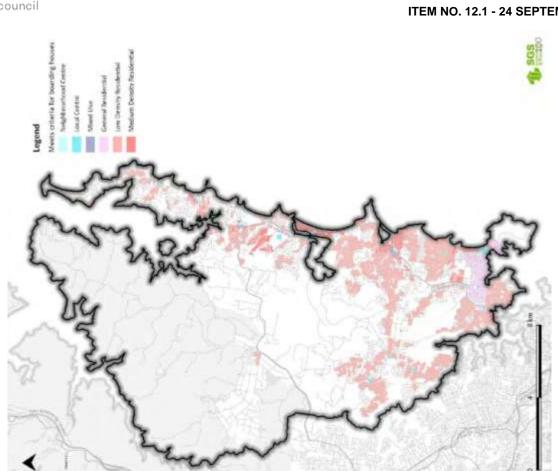




Boarding houses

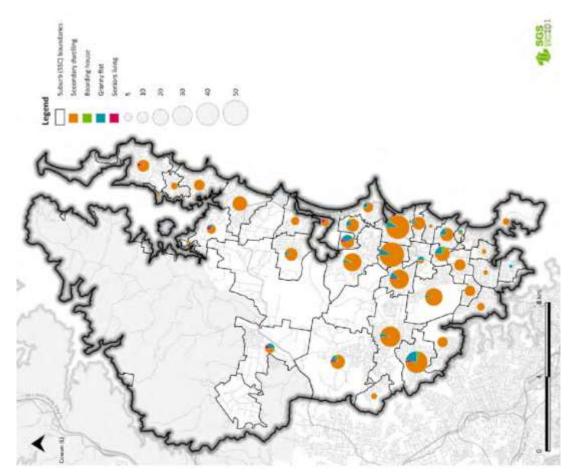
- Suitable sites for boarding houses under the SEPP are generally concentrated around existing transport corridors.
- The requirements for boarding houses include:
 - Permitted in R1, R2, R3, R4, B1, B2 and B4 zones
- In the R2 zone, the site must be accessible, in terms of being within:
- 800 metres walking distance of a public entrance to a railway station or a wharf from which a Sydney Ferries ferry service operates, or
- 400 metres walking distance of a public entrance to a light rail station or, in the case of a light rail station with no entrance, 400 metres walking distance of a platform of the light rail station, or
- 400 metres walking distance of a bus stop used by a regular bus service (within the meaning of the Passenger Transport Act 1990) that has at least one bus per hour servicing the bus stop between 06.00 and 21.00 each day from Monday to Friday (both days inclusive) and between 08.00 and 18.00 on each Saturday and Sunday.











Recent development of these dwelling types

- Secondary dwellings, granny flats, boarding houses and seniors dispersed across the Northern Beaches, but with higher living sites developed since 2016 have been generally numbers in the southern half of the LGA.
- These types of dwellings have been most concentrated in suburbs including Narraweena, Dee Why, Forestville and Frenchs Forest.
- Secondary dwellings were the most common type of these dwellings developed since 2016, with relatively few of the other types, as illustrated by the pie charts in the map.

Type	Developments constructed since 2016
Secondary dwellings	440
Boarding house	7
Granny flat	23
Seniors living	80
TOTAL	507

SGSEP.COM.AU



Opportunities – development standards for housing

- Development standards for housing will affect the design and quality of new housing.
- Opportunities exist to look at controls relating to the provision of carparking to support housing, and ways to either reduce the impact and/or improving feasibility of different housing development types.
- A key issue with the increasing of development density in detached housing areas, is to ensure that there is provision of deep soil zones and also the retention and establishment of vegetation, including tree canopy.
- Other key controls are the use of minimum allotment size to ensure that effective design can be achieved.
- Review of development standards using a development feasibility model, that looks at how the controls will either encourage or discourage the housing types, and whether the strategic intent to provide additional housing diversity will be achieved.

SGSEP.COM.AU

- For example, this could include car parking innovations, to both reduce costs and create better built form outcomes, such as:
 - Modified parking rates in appropriate locations/close to centres
- Pooled parking on site
- At-grade parking instead of basement parking.

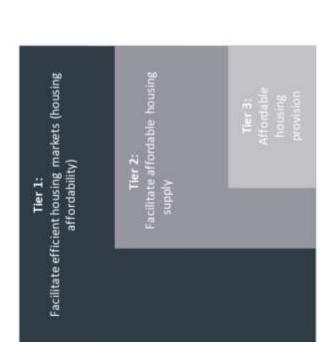
This Issues Paper is not a detailed review of development controls, other than relating to general housing type.



Opportunities – affordable housing supply

- Typically, 'affordable housing' is understood as meaning housing available to buy or rent for people in the bottom two quintiles of the income distribution, at 30% of average household income.
- There are a number of roles for local government that would provide greater affordable housing supply. The most important role is strategicplanning and regulation for private sector housing.
- Tier 1. The private housing market deliver well over 90% of all housing. Key instruments include housing strategy (and land use planning) and planning directions
- Tier 2. Facilitating sufficient supply of affordable housing. Key instruments include planning mechanisms for affordable housing as part of development (i.e. inclusionary zoning).
- Tier 3. Investing in provision and/or management of affordable housing. Key instruments include public housing provision, investing in community housing sector, incentives and partnerships.
- Local government traditionally have a role in the Tier 1 and Tier 2 approaches, however as a property and asset owner may be able to have a greater role in Tier 3.







Northern Beaches affordable housing policy

- Northern Beaches Council's **Affordable Housing Policy** commits to increasing the range and supply of affordable housing. This is needed to meet growth demand and the changing needs of the community, including key workers. The key principles of the Policy are:
- Establishing clear targets for the provision of affordable housing in the Northern Beaches.
- Leading change by example.
- Embedding affordable housing in Council's strategies, plans and policies.
- Partnering with the State and Commonwealth Government, other local councils, industry experts, the private sector, stakeholders and community housing providers to deliver affordable rental housing.
 - Advocating for change to support affordable housing in the Northern Beaches.
- Policy statements to guide Council's actions include:
- A 10 percent affordable rental housing target for all strategic plans and planning proposals for urban renewal and greenfield development, with higher rates sought where

SGSEP.COM.AU

feasible. Targets in other areas will be established through feasibility analysis and the LHS.

- Investigation of mechanisms to deliver affordable marketbased and private housing.
- Development of relationships and agreements with community housing providers, including identifying models for delivery.
- Prioritisation of key workers, people with a disability, long term residents, and people with social or economic associations with the area when selecting tenants.
- The NSW SEPP 70 Affordable Housing (Revised Schemes) allows for Councils to amend their LEPs to include an affordable rental housing contribution scheme.
- Contribution schemes are expected to be developed using an evidence base, estimates of demand, and consider areas identified for rezoning as part of the LHS process.
- Contributions rates are required to be developed and tested to ensure that the rate is viable and will not impact on development feasibility, and therefore on overall supply.



Opportunities – linking housing to infrastructure provision

- LHS is to ensure the housing development is accompanied Another opportunity that can be developed through the infrastructure. This is being considered by the LSPS and by appropriate social, transport and community other studies which are currently underway.
- Opportunities include:
- Requirements for local infrastructure within development controls plans (DCPs)
- Council to play an advocacy role with the State Government to achieve upgrade to State-level social and transport infrastructure.
 - Implementation of climate change mitigation infrastructure
 - Potential to expand the existing urban tree canopy as part of housing development.



Source: Northern Beaches Council



Source: Health Infrastructure NSW

SGSEP.COM.AU

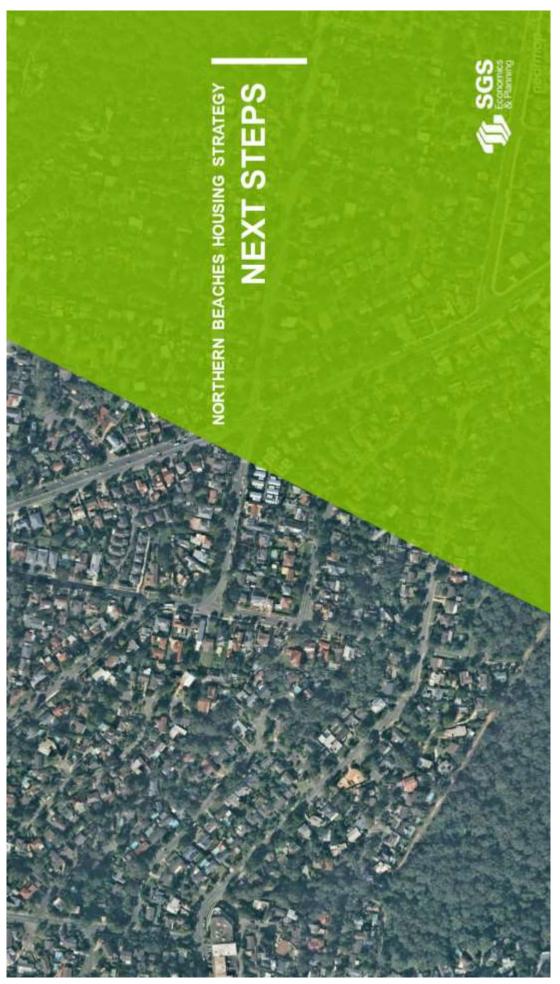


- Across the LGA there are a number of broad areas of opportunity that could help to provide more housing, increase housing diversity, and improve the quality of built form.
- These include:
- Investigate the redevelopment of current Councilowned sites (such as at-grade carparks) to include affordable housing
 - Establish partnerships with LAHC and community housing providers to deliver social and affordable housing.



Source: Bridge Housing Design Guidelines





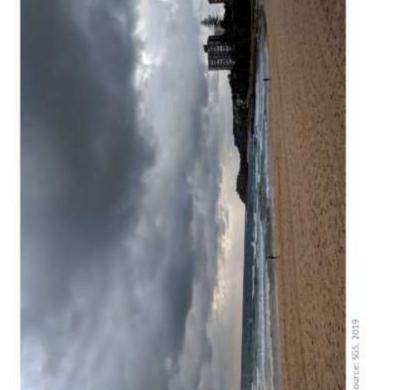


Recap of key issues for the housing strategy

- include:
- Accommodating the housing needs of changing demographics - including for the ageing of the dwelling types and increasing housing diversity population and preferences towards smaller
- Addressing existing and projected future demand for social and affordable housing and the need to improve housing affordability
- expected longer-term demand for housing, as the existing capacity for housing may be exhausted in Planning for opportunities to accommodate the next 10 to 15 years
- Identifying where to locate new housing
- The role of local government in facilitating and delivering new and affordable housing
- and its application across the LGA in a form suitable Responding to the Medium Density Housing Code, for the character of the Northern Beaches
 - Aligning growth with infrastructure provision.









Next steps

- Council is seeking comments and feedback on this Issues and Opportunities Paper.
- The feedback received from the community in the consultation process will be used to inform the preparation of the draft Northern Beaches Local Housing Strategy (LHS).
- This draft will be made available to the public for consultation, with comments being incorporated into the final LHS.



Jource: \$65, 2019





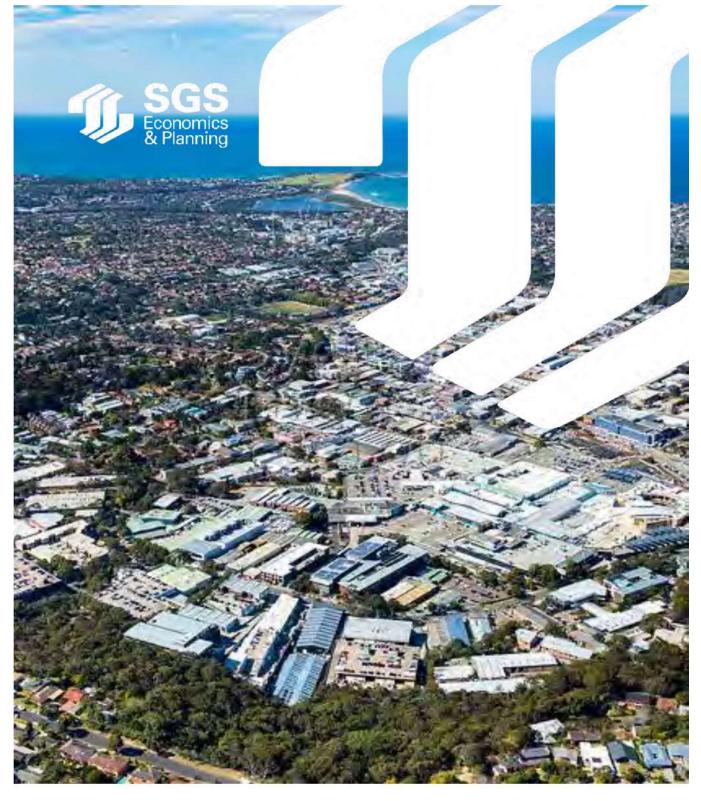


Canberra P: +61 2 6257 4525 E: sgsact@sgsep.com.au

Hobart P: +61 3 6264 311

P: +61 3 6264 3116 E: sgstas@sgsep.com.au Melbourne P: +61 3 8616 0331 E: sgsvic@sgsep.com.au Sydney P: +61 2 8307 0121 E: sgsnsw@sgsep.com.au





NORTHERN BEACHES EMPLOYMENT STUDY – BACKGROUND REPORT

FINAL AUGUST 2019 Prepared for Northern Beaches Council Independent insight.







© SGS Economics and Planning Pty Ltd 2019

This report has been prepared for Northern Beaches Council. SGS Economics and Planning has taken all due care in the preparation of this report. However, SGS and its associated consultants are not liable to any person or entity for any damage or loss that has occurred, or may occur, in relation to that person or entity taking or not taking action in respect of any representation, statement, opinion or advice referred to herein.

SGS Economics and Planning Pty Ltd ACN 007 437 729 www.sgsep.com.au Offices in Canberra, Hobart, Melbourne, Sydney

190012 - Northern Beaches LGA Background Paper - 190814 - client



TABLE OF CONTENTS

EXE	CUTIVE SUMMARY	5
1. PI	ROJECT CONTEXT	8
1.1	Study Objectives	8
1.2	Paper Structure	8
1.3	Northern Beaches Context	8
2. S	TRATEGIC POLICY AND PRIORITY REVIEW	10
2.1	State Policies	10
2.2	Local Studies	18
2.3	Statutory Planning Context	30
2.4	Key Findings	34
3. S(DCIO-ECONOMIC PROFILE	36
3.1	Population	36
3.2	Employment	44
3.3	Tourism	68
3.4	Key Findings	70
4. TI	RENDS AND DRIVERS	73
4.1	Retailing	73
4.2	Industrial and Urban Services Lands	82
4.3	Night-Time Economy	85
4.4	CoWorking Spaces	89
4.5	An Ageing Population	93
4.6	Visitor Economy	97
4.7	Sustainability	100
4.8	Key Findings	103
5. El	MERGING INSIGHTS	105
5.1	Challenges	105
5.2	Opportunities	106
5.3	Questions	108
5.4	Next Steps	109
REF	ERENCES	110
APP	ENDIX 1- BROAD INDUSTRY CATEGORIES (BIC) DEFINITION	113
APP	ENDIX 2 – UNDERSTANDING DATA AND MEASURES	114



Northern Beaches Employment Study – background report



APPENDIX 3- GLOSSARY	119
LIST OF FIGURES & TABLES	
FIGURE 1: NORTHERN BEACHES LGA CONTEXT	9
FIGURE 2: FRENCHS FOREST HEALTH AND EDUCATION PRECINCT	12
FIGURE 3: BROOKVALE-DEE WHY STRATEGIC CENTRE	13
FIGURE 4: MONA VALE STRATEGIC CENTRE	14
FIGURE 5: MANLY STRATEGIC CENTRE	15
FIGURE 6: CITY-SHAPING AND CITY-SERVING TRANSPORT NETWORKS FOR 2056, WITH SEVERAL NEW TRANSPORT CONNECTIONS THROUGH THE NORTHERN BEACHES LGA	17
FIGURE 7: PHASING STRATEGY – HOSPITAL PRECINCT STRUCTURE PLAN	21
FIGURE 8: BALGOWLAH INDUSTRIAL ESTATE	25
FIGURE 9: MANLY INDUSTRIAL ZONE MASTERPLAN	28
FIGURE 10: MANLY MASTERPLAN	30
FIGURE 11: COMPARATIVE AGE PROFILE STRUCTURE (2016)	38
FIGURE 12: COMPARATIVE LABOUR FORCE STRUCTURE (2016)	39
FIGURE 13: COMPARATIVE PROPORTIONAL CHANGE IN LABOUR FORCE STRUCTURE (2006 2016)	5- 39
FIGURE 14: COMPARATIVE INDUSTRY OF EMPLOYMENT (PUR) STRUCTURE (2016)	40
FIGURE 15: COMPARATIVE PROPORTIONAL CHANGE IN INDUSTRY OF EMPLOYMENT (PUR STRUCTURE (2006-2016)	() 40
FIGURE 16: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (PUR) – MAP (2016)	41
FIGURE 17: BROADER CATCHMENTS METHOD OF TRAVEL TO WORK (PUR) – MAP (2016)	43
FIGURE 18: COMPARATIVE PROPORTIONAL CHANGE IN METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2006-2016)	44
FIGURE 19: EMPLOYMENT GROWTH 2011-2016 BY SA2	45
FIGURE 20: COMPARATIVE INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2016)	46
FIGURE 21: COMPARATIVE PROPORTIONAL CHANGE IN INDUSTRY OF EMPLOYMENT	
(POW) STRUCTURE (2006-2016)	47
FIGURE 22: COMPARATIVE OCCUPATION (POW) STRUCTURE (2016)	48
FIGURE 23: COMPARATIVE PROPORTIONAL CHANGE IN OCCUPATION (POW) STRUCTURE (2006-2016)	48
FIGURE 24: NORTHERN BEACHES COMPARATIVE GROWTH TOTAL EMPLOYMENT CHANGE 2006-16	49
FIGURE 25: NORTHERN BEACHES COMPARATIVE PROPORTIONAL CHANGE OF EMPLOYMENT DIVERSITY 2006-16	50
FIGURE 26: NORTHERN BEACHES LOCATION QUOTIENT ANALYSIS, 2011-2016	52
FIGURE 27: EMPLOYMENT MARKET VACANCIES (APRIL 2019)	61
FIGURE 28: COMPARATIVE METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2016)	63
FIGURE 29: COMPARATIVE PROPORTIONAL CHANGE IN METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2006-2016)	63
FIGURE 30: 30MIN ACCESSIBILITY TO FRENCHS FOREST DURING AM PEAK– MAP (2019)	64
FIGURE 31: 30MIN ACCESSIBILITY TO BROOKVALE-DEE WHY DURING AM PEAK– MAP (2019)	65



Northern Beaches Employment Study – background report



FIGURE 32: 30MIN ACCESSIBILITY TO MANLY DURING AM PEAK– MAP (2019)	66
FIGURE 33: 30MIN ACCESSIBILITY TO MOVA VALE DURING AM PEAK– MAP (2019)	67
FIGURE 34: TOTAL VISITORS NORTHERN BEACHES LGA	68
FIGURE 35: NORTHERN BEACHES LGA, BREAKDOWN OF VISITOR NIGHTS 2017/18	68
FIGURE 36: VISITOR DATA FOR NORTHERN BEACHES	69
FIGURE 37: MARKET SHARE OF LEADING SUPERMARKETS, 2006-2015	73
FIGURE 38: ONLINE RETAIL SALES BY INDUSTRY (YOY S.A.)	81
FIGURE 39: CHANGES IN NIGHT-TIME ECONOMY ESTABLISHMENTS FOR NORTHERN BEACHES	86
FIGURE 40: CHANGES IN TOTAL ESTABLISHEMENT FOR NORTHERN BEACHES	86
FIGURE 41: WORKERS IN MAJOR INDUSTRY GROUPS IN LONDON BY USUAL WORK PATTERN, 2017	89
FIGURE 42: EIGHT DOMAINS OF AN AGE FRIENDLY CITY	94
FIGURE 43: DOMESTIC OVERNIGHT TOURISM TRENDS	97
FIGURE 44: NORTHERN BEACHES LGA, BREAKDOWN OF VISITOR NIGHTS 2017/18	98
FIGURE 45: NORTHERN BEACHES LGA, TIME SERIES – TOURISM NIGHTS	98
FIGURE 46: ECONOMIC VISITION VALUE FOR ARTS AND CULTURAL SCENE IN SYDNEY	99
TABLE 1: BROADER CATCHMENTS POPULATION TOTALS AND GROWTH RATES (2011-2016)	36
TABLE 2: COMPARATIVE POPULATION TOTALS AND GROWTH RATES (2006-2016)	37
TABLE 3: BROADER CATCHMENTS POPULATION DENSITY (PER KM ²) TOTALS AND GROWTH RATES (2011-2016)	37
TABLE 4: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (PUR) PROPORTIONS	
(2016)	40
TABLE 5: BROADER CATCHMENTS OCCUPATION (PUR) TOTALS (2016)	42
TABLE 6: BROADER CATCHMENTS OCCUPATION (PUR) TOTALS (2016)	42
TABLE 7: LOCAL OCCUPATION (PUR) TOTALS AND GROWTH RATES (2006-2016)	42
TABLE 8: BROADER CATCHMENTS EMPLOYMENT TOTALS AND GROWTH RATES (2011- 2016)	44
TABLE 9: BROADER CATCHMENTS OCCUPATION (POW) PROPORTIONS (2016)	47
TABLE 10: NORTHERN BEACHES EMPLOYMENT MULTIPLIERS (2016)	54
TABLE 11: PLACE OF WORK FOR NORTHERN BEACHES' WORKING RESIDENTS BASED ON INDUSTRY TYPE (2016)	56
TABLE 12: PLACE OF WORK FOR NORTHERN BEACHES' WORKING RESIDENTS BASED ON OCCUPATION TYPE (2016)	57
TABLE 13: INWARD MIGRATION OF WORKERS BASED ON INDUSTRY TYPE (2016)	58
TABLE 14: PLACE OF USUAL RESIDENCE OF WORKERS BASED ON OCCUPATION TYPE (2016)	59
TABLE 15: COMMERCIAL AND RETAIL VACANCIES (APRIL 2019) *	60
TABLE 16: INDUSTRIAL VACANCIES (APRIL 2019)	60
TABLE 17: NORTHERN BEACHES HISTORICAL COMMERCIAL SALES (NOVEMBER 2018 – MAY 2019)	62
TABLE 18: ORIGIN OF WORKERS EMPLOYED ON THE NORTHERN BEACHES (2016)	62
TABLE 19: AUSTRALIA'S COMPETITIVE LANDSCAPE	83
TABLE 20: INDUSTRY GROUPS	113



Northern Beaches Employment Study – background report







EXECUTIVE SUMMARY

Northern Beaches Council has commissioned a number of strategic planning studies, including the Northern Beaches Employment Study, to inform the development of the Local Strategic Planning Statement (LSPS) and Economic Development Plan and updates to the Local Environmental Plan (LEP).

The purpose of this first paper is to complete a review of the current policy landscape, socioeconomic profile, and general economic trends and drivers to identify a number of challenges and opportunities that will be tested and refined over the course of the study.

The review of the current policy landscape indicates Northern Beaches Health and Education Precinct will be the focus of significant investment for the LGA. The hospital and investments are expected to stimulate the economy and provide a greater number of jobs in the area. Growing local job opportunities and ensuring efficient access to these jobs (creating a 30minute city) is also a key focal point for other strategic centres in the LGA, including Brookvale-Dee Why, Manly and Mona Vale. Investigating tourism opportunities has also been identified as a key area to leverage. Policy directives are encouraging a mix of land uses for Manly centre. All levels of planning support a 'retain and manage' policy for industrial and urban services lands in the Northern Beaches LGA.

Industrial lands in the North District are of high value to the Greater Sydney region. Brookvale contains the largest general industrial precinct in the North District, and yet the North District has the least amount of industrial and urban services land stock in the Greater Sydney region. These lands are under increasing pressure from non-industrial land uses, such as large format retail, residential, office, gyms and childcare centres. The value of these lands, in performing important functions for cities and populations, needs to be recognised. The provision of jobs and services, such as car repair, close to where people live, and other businesses are critical to the productivity of the North District and Greater Sydney.

Local level planning policy indicates growth that is sensitive to the natural and built environment; supporting local interaction in smaller centres; developing the night-time economy and investigating access to centres via all transport modes is important to the local community. Local businesses have identified that distance is an issue for growth.

Socio-economic profiling indicates the Northern Beaches LGA will experience lower growth rates than the Greater Sydney region, as well as an increasingly ageing population which is generally consistent with Greater Sydney.

Northern Beaches LGA has a higher proportion of people working part-time than Greater Sydney and the North District and this has been growing since 2006. Just over half of the local resident population work locally, and over three quarters of the local jobs are filled by local working residents. Self-containment generally increases moving north in the LGA. A higher share of local residents work in Knowledge Intensive jobs and Population Serving jobs, although there has been a rise in the number of people working in Health and Education. A significant number of people travel out of the LGA, particularly to work in Knowledge Intensive industries, in Sydney CBD, North Sydney and Willoughby, while social assistance, aged care workers and teachers tend to come into the LGA for work. Improving transport connections between Northern Beaches to Greater Sydney will support the journey to work between the LGAs.

There are high rates of private vehicle use to access employment in the Northern Beaches which generally increases moving further north of the LGA. There are strong 30-minute linkages between Frenchs Forest and Brookvale-Dee Why, as well as to Chatswood. Generally,





there is strong 30-minute access radiating out of Brookvale-Dee Why to surrounding areas in the LGA. Manly and Mona Vale tend to have a more contained level of access.

The retailing landscape is varied and changing. Online retailing has impacted traditional 'bricks and mortar' retailing and these retailers are having to find new ways to engage and attract customers. Regional shopping centres are becoming more mixed-use centres. The food and dining scene have seen strong success in cafes, some restaurants are building the 'experience' components with other activity to attract diners and food courts are redeveloping to engage with the 'outdoors' and improve amenity. Fine grain retailing has had to compete with the popularity of regional shopping centres in recent years.

With the rise in online retailing, the value of industrial and urban services lands for logistics uses located in close proximity to residential areas has never been more apparent. There has also been growth in creative led land uses in these areas. It will be important to ensure industrial and urban services are retained and provide for local communities and are not overcome by creative-led gentrification and pressure from other land uses such as retail, office or residential.

A number of other trends and drivers requiring consideration include:

- There has been a rise in coworking spaces in Greater Sydney in recent years. Coworking spaces can take many forms and support a variety of working styles.
- There are two components to a night-time economy. The social aspect of bars, clubs and restaurants and the more practical and functional side where services, safety and amenity of centres needs to support late-night workers and shift workers.
- An ageing population will require employment opportunities that support their financial independence later in life; and economic centres and businesses that cater to their essential, social and recreational needs, as well as a built form and transport servicing that supports their mobility. Economic centres must also respond and cater to the rest of the population in the LGA, including those migrating in to the LGA that will help replenish the workforce.
- Arts and culture-based tourism, food and wine centred tourism and nature-based tourism are all strongly represented within the NSW visitor economy. There is potential for these areas to be capitalised upon further in NSW.
- Technological developments and designs could be implemented to support the sustainability agenda.

A number of challenges have been identified for the LGA. Specifically, for centres, this relates to:

- Frenchs Forest Town Centre that suffers from severance which will need to be resolved as the centre grows. A number of precincts in Greater Sydney have been designated as health and education precincts. Frenchs Forest will be directly competing with these other well-established medical and education centres to attract highly skilled workers.
- Brookvale is an ill-defined centre that lacks good amenity and contains a dominant Westfields shopping centre as a central point for the local population. A challenge will be to protect the industrial and urban services land in the centre and balance it with the other major role of Brookvale, as a population serving centre.
- Dee Why centre requires strengthening of its role as a civic and population serving centre that complements Brookvale.
- Manly centre has the potential for land use tension into the future. Policy directives are
 encouraging a diverse mix of uses as the centre grows but it also suffers low accessibility.
- Mona Vale needs to elevate to fulfil its role as a strategic centre for the north of the LGA. Generally, other challenges for the LGA include protecting the integrity of the industrial precincts; understanding the concept of 'working locally'; ensuring centres can support an increasingly ageing population and attract diversity; and overcoming an overall lack of connectivity within centres and topography issues and high private vehicle use.

Opportunities for the development of the Northern Beaches economic centres includes:





- Improving connectivity in Frenchs Forests to ensure retail, health and education components function together and valuing the presence of the Frenchs Forest business park and supporting a higher commercial (office) function. There is also opportunity develop the place branding of Frenchs Forest to help attract a highly skilled workforce.
- The functionality of Brookvale should be improved by integrating Warringah Mall with surrounding land uses, improving amenity, developing a focal point for the centre and determining the right mix of industrial and urban services uses and protecting and managing these lands.
- The role of Dee Why as a civic and population serving centre, that complements Brookvale, should be elevated through greater amenity improvements and development of its population serving components.
- Manly centre will require a clear vision to reduce future land use conflict, particularly centred around building its tourism role.
- The future of Mona Vale centre will involve development that achieves strategic centre status; in particular it should serve the needs of the northern populations; and it should not complete with other strategic centres in the LGA.





1. PROJECT CONTEXT

1.1 Study Objectives

Northern Beaches Council has commissioned a number of strategic planning studies, including the Northern Beaches Employment Study, to inform the development of the Local Strategic Planning Statement (LSPS), updates to the Local Environmental Plan (LEP) and the Economic Development Plan.

The Northern Beaches Employment Study will assist Council to:

- Understand the current employment and economic context of the Local Government Area (LGA) and its links to the Eastern Economic Corridor and Greater Sydney.
- Understand the macro changes shaping our economy and develop an understanding
 of how these changes will impact land use activity in employment hubs in the LGA.
- Understand micro drivers of economic activity, particularly job containment, which will be explored through interviews, business and workforce surveys.
- Understand the value proposition of the Northern Beaches for businesses and identify existing and emerging industry clusters across employment hubs to inform growth projections and economic development responses.
- Consider the contribution of economic activity to the local character and identity of 'employment hubs' to encourage an 'employment neighbourhood' perspective.
- Identify existing supply and capacity of employment generating lands under current development controls and develop an understanding of current split of land uses by floorspace, including vacancy rates.
- Assess future demand for employment and economic growth based on population projections to 2036.
- Make planning recommendations to inform the Local Strategic Planning Statement and Local Environmental Plan and non-planning recommendations to inform an Economic Development Plan.

1.2 Paper Structure

The purpose of this first paper is to complete a review of the policy background and economic context and identify a number of challenges and opportunities that will be tested and refined over the course of the study.

The paper is structured as follows:

- Strategic policy and priority review
- Employment and economic profile
- Trends and drivers
- Challenges and opportunities
- Emerging insights.

1.3 Northern Beaches Context

Northern Beaches Council is a recent amalgamation of Warringah, Manly and Pittwater Councils. Located in the north of Greater Sydney, encompassing Ku-ring-gai National Park in the west and running through to the east coast, Northern Beaches Council contains a number of Greater Sydney Commission (GSC) nominated Strategic Centres, namely French Forest Health and Education Precinct, Brookvale-Dee Why, Manly, Mona Vale, as well as identified local centres including Balgowlah, Manly Vale, Freshwater, Narrabeen, Warriewood, Newport,



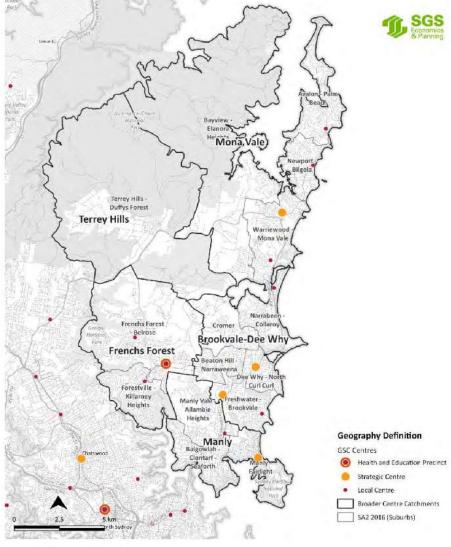
northern

beaches council



Avalon, Forestville, Glenrose. These centres contain a mixture of land uses that span population serving, health and education, commercial and industrial industries.

FIGURE 1: NORTHERN BEACHES LGA CONTEXT



Source: SGS Economics & Planning



2. STRATEGIC POLICY AND PRIORITY REVIEW

This chapter provides a strategic policy overview, with a focus on state, local and other strategies and polices that inform the future direction of Northern Beaches economic development.

Strategic plans from the NSW Government and Northern Beaches Council provide the context for future land use in the Northern Beaches LGA. These plans anticipate increases in population and employment and provide guidance about where this growth should occur. The need to accommodate growth must be balanced with land use limitations as land use conflict may occur in places where the most intense development is intended.

2.1 State Policies

Greater Sydney Region Plan (2018)

The Greater Sydney Region Plan (GSRP) is a metropolitan strategy that responds to the current and future planning challenges of the Greater Sydney Region. The aim of the GSRP is to transform Greater Sydney into a metropolis of three cities: The Western Parkland City, the Central River City and the Eastern Harbour City over the next 40-year period. This vision will be progressed via a series of objectives centred on infrastructure, collaboration, liveability, productivity and sustainability.

Northern Beaches Council is in the Northern District. Directions for productivity include developing a well-connected city that supports shorter, localised connections to jobs, schools and services through integrated land use, transport and infrastructure planning; and enhancing productivity through strategic planning that enables jobs and skills growth and investment for LGAs, such the Northern Beaches.

Implications for Employment & Economic Centres

The GSRP includes *Objective 21: Internationally competitive health, education, research and innovation precincts.* This objective recognises successful health and education precincts are internationally competitive and are also innovation districts - an active ecosystem that includes health and education assets, medical research institutions, are transit accessible and have a complementary mix of industry tenants, housing and ancillary facilities and services.

Strategies to develop these precincts include conditions for the co-location of health and education facilities; high levels of accessibility; attraction of associated businesses and housing opportunities for students and workers within 30 minutes of the precinct.

Objective 22: Investment and business activity in centres. This objective identifies the role of centre hierarches in effective strategic planning. Centres play a role in delivering jobs close to home, facilitate an effective public transport system and provide a range of social and economic infrastructure to support local and metropolitan communities.



northern

beaches council



The GSRP outlines the importance of clear and consistent application of the centre hierarchies to ensure that retail, commercial and other population-serving uses can be effectively distributed to meet the needs of the communities that each centre supports.

Not all centres are the same and the GSRP centre's hierarchy identifies three centre types relevant to Greater Sydney:

- Metropolitan Centres the focus for Sydney's global economic competitiveness.
- Strategic Centres to provide access to goods, services and jobs for a range of different communities.
- Local Centres to support day-to-day access to goods and services.

Objective 22 also identifies the following other types of economic places:

- Health and Education precincts clustered around a hospital and/or major tertiary education institution.
- Economic Corridor that include multi-LGA precincts with a high concentration of jobs, often linking multiple centres.

To create a more productive city, the GSRP aims to grow jobs in metropolitan centres, health and education precincts and strategic centres.

Frenchs Forest is classified as a Health and Education precinct. Manly, Mona Vale and Brookvale-Dee Why are classified as Strategic Centres. Employment growth in these areas and public transport access to these centres could create opportunities for redevelopment. Balgowlah, Manly Vale, Freshwater, Narrabeen, Warriewood, Newport, Avalon, Forestville and Glenrose are designated Local Centres.

The GSRP includes *Objective 23: industrial and urban services land is planned, retained and managed* which recognises the value of industrial lands within a city where it is not necessarily the number of jobs provided, but the operational role and function industrial lands play that is of importance.

Industrial lands in the Northern Beaches support local businesses and communities. Industrial lands can include a range of activities from major freight and logistics, heavy manufacturing, light industry, to urban services and creative uses.

The principles for managing industrial and urban services land across Greater Sydney, as identified in the GSRP, includes:

- Retain and manage all existing industrial and urban services land should be safeguarded from competing pressures, particularly residential and mixed-use zones.
- Review and manage review all industrial and urban services land under this
 approach to either confirm its retention or manage uses to allow sites to transition to
 higher-order employment activities and seek appropriate controls to maximise
 business and employment outcomes.
- Plan and manage in land release areas identify additional industrial and urban service land.

The Northern Beaches is designated as a 'retain and manage' LGA.

Objective 24: economic sectors are targeted for success identifies several industry sector strategies that facilitate business innovation. For example, mobile business advisors are based in the Northern Beaches this will help to create the conditions for a stronger economy and facilitate job growth in the area.





North District Plan (2018)

The North District Plan (NDP) is a 20-year strategy, linked to the GSRP, that aims to manage growth in the District. The NDP informs local level strategic planning, assessment of planning proposals and gives effect to the GSRP.

Implications for Employment & Economic Centres

Key industrial, strategic centres, collaboration areas and health and education precincts have directives and priorities. The Plan seeks to align job growth services and transport to deliver a well-connected 30-minute city.

Planning Priority N1 – Planning for a city supported by infrastructure: where planning decisions need to support new infrastructure, equitably enhancing local opportunities, inclusion and connections to services. A potential indicator is an increase in 30-minute access to a centre/cluster. This action could include improved east-west bus services from Northern Beaches to Chatswood and the Beaches Link and Western Harbour Tunnel, providing better connectivity to Frenchs Forest Strategic Centre.

Planning Priority N9 - Growing and investing in health and education precincts: the Frenchs Forest Health and Education precinct is led by the NSW Department of Planning and Industry, State agencies, NSW Health and Northern Beaches Council to progress planning. The newly constructed \$600 million Northern Beaches Hospital will continue to anchor growth in the North District.

Currently it is estimated 9,300 people work within the Frenchs Forest precinct. The NDP identified potential job targets of approximately 12,000 jobs by 2036 as a baseline and 13,000 as a higher target. One of the key actions is the delivery and implementation of a Place Strategy and Infrastructure Plan for this precinct.



FIGURE 2: FRENCHS FOREST HEALTH AND EDUCATION PRECINCT

Source: Greater Sydney Commission, 2018

Planning Priority N10 – Growing investment, business opportunities and jobs in strategic centres: strategic centres must make use of jobs, services and public transport connectivity. Specifically, this Planning Priority identifies actions for the District's Strategic Centres. Of relevance to the Northern Beaches LGA is the **Frenchs Forest** strategic centre, see Figure 2, which is also identified as a health and education precinct. Frenchs Forest and the Northern Beaches Hospital will help to create a vibrant strategic centre core which will provide a location for knowledge intensive jobs, innovation and service delivery. The hospital and recent investments into transport will facilitate future development of the area.

Specific employment related actions for Frenchs Forest, as designated by the GSC, include:

- Leverage the investment in the Northern Beaches Hospital to provide a vibrant and well-connected strategic centre.
- Deliver an urban core with a mix of commercial and residential uses, open space and community facilities.





- Attract new, innovative health and medical related commercial premises to support the hospital.
- Reinforce the centre as an employment hub for the Northern Beaches, building on the existing business park east of the Wakehurst Parkway.

FIGURE 3: BROOKVALE-DEE WHY STRATEGIC CENTRE



Source: Greater Sydney Commission, 2018

Brookvale-Dee Why is an industrial and mixed-use area supporting niche manufacturing wholesale industries in the day, as well as a local night-time economy, see Figure 3. It contains Warringah Mall, one of the largest retail areas in Greater Sydney, as well as a TAFE NSW campus. The 2016 estimate of 20,000 jobs is projected to grow to between 23,000 - 26,000 by 2036.

Specific employment related actions for Brookvale-Dee Why, as designated by the GSC, include:

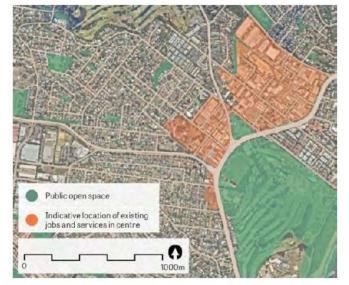
- Maintain a mix of uses so that Brookvale-Dee Why continues to perform strongly as a well-balanced, self-sustaining combined centre.
- Encourage and support improvements to Warringah Mall and better integrate it within the fabric and life of Brookvale-Dee Why.
- Recognise and encourage the economic and employment opportunities along Pittwater Road and encourage revitalisation along the commercial strip.
- Promote walking, cycling and public transport to Warringah Mall, the Brookvale industrial area and Dee Why.
- Encourage the establishment of new, innovative and creative industries in the Brookvale industrial area.
- Encourage new lifestyle and entertainment uses to activate local streets in Brookvale-Dee Why.

While these NDP treats Brookvale and Dee-Why as one centre, the actual form and function of these places is distinct and are therefore being treated in this paper as separate, yet complementary centres.





FIGURE 4: MONA VALE STRATEGIC CENTRE



Source: Greater Sydney Commission, 2018

The Northern District Plan also identified **Mona Vale** as a mixed-use strategic centre, see Figure 4. The area provides a range of functions including retail, commercial, community, light industrial and residential uses. The centre is identified as a vibrant centre by day and is identified as a high amenity centre. The introduction of the B line into the area has improved the connectivity of Mona Vale to the CBD. The 2016 estimate of 4,300 jobs is expected to grow to between **5,000 - 6,000 jobs by 2036**.

Specific employment related actions for Mona Vale, as designated by the GSC, include:

- Protect and enhance the commercial and retail function of the centre to provide employment growth and maintain high job containment.
- Ensure sufficient retail and commercial floorspace is provided to meet future demand.
- Leverage Mona Vale's role as a north-south and east-west bus interchange to facilitate a greater diversity of employment and mixed-uses in the centre.
- Retain and manage the industrial precinct to the north of the centre to serve the growing population.



FIGURE 5: MANLY STRATEGIC CENTRE



Source: Greater Sydney Commission, 2018

Manly offers a variety of cultural, tourism and entertainment activities near Manly Beach, one of the most popular beaches in Sydney, see Figure 5. It is well served by public transport and includes a ferry and bus service from the Sydney CBD. The 2016 estimate of 5,000 jobs is projected to grow to between **6,000 - 6,500 by 2036**. This growth could potentially encourage a greater presence of visitors and tourists in the LGA and increase the desirability of living in this location with more local jobs opportunities.

Specific employment related actions for Manly, as designated by the GSC, include:

- Further develop Manly as a cultural, tourist, retail and entertainment precinct.
- Encourage diversified commercial activity to improve economic resilience.
- Encourage eco-tourism around North Head and the Cabbage Tree Aquatic Reserve.

In summary, NDP job targets for the various strategic centres are:

Strategic Centre	2016 Job Estimate	2036 Baseline Job Target (total jobs)	2036 Higher Job Target (total jobs)
Frenchs Forest	9,300	12,000	13,000
Brookvale – Dee Why	20,000	23,000	26,000
Manly	5,000	6,000	6,500
Mona Vale	4,300	5,000	6,000



Other relevant planning priorities contained in the NDP include:

Planning Priority N11 - Retaining and managing industrial and urban services land: the North District has the smallest proportion of industrial and urban services lands in Greater Sydney. The NDP identifies urban services land and industrial lands as critical. These lands support the functioning of the area. The NDP aligns with the GSRP and classifies the lands to be retained and managed.

Planning Priority N13 – Supporting growth of targeted industry sectors: the NDP recognises the importance the tourism and rural industries. For instance, the tourism and visitor economy are identified in the Plan as being central to the productivity of the Northern Beaches LGA. Attractions in the area include several beaches and National Parks. Investments into the Walk and Cycleway to/from Manly to Palm Beach will also facilitate investment in this sector. The North District includes part of the Metropolitan Rural Area, where agricultural processing and export is an important component. This planning priority supports:

- Growth of internationally competitive industry sectors
- Response to changing technologies
- Planning for tourism and visitation activities
- Protection and support of rural industries.

A Metropolis that Works, GSC Thought Leadership Series

The paper responds to Objective 23 of the GSRP that industrial and urban services land be planned, retained and managed and acknowledges the changing nature of industrial and urban services and their spatial requirements and strategic value.

Great cities are acknowledged as also being working cities - more than just residential neighbourhoods where residents have improved travel times but where industrial or employment precincts play an important and equitable role in the day-to-day functioning of a city. Spaces are needed in the city where people can function, make and create.

It is recognised only eight per cent of land across Greater Sydney is zoned for non-residential uses such as industrial and urban services yet, 19 per cent of all jobs across Greater Sydney are classed as industrial.

The paper highlights the sector is evolving from its traditional manufacturing, service, repairs, transport and warehousing association to higher order industrial, technology, creative and logistic uses. It is stated that research indicates there is often a mismatch between businesses operating in the industrial and urban services lands and standard land use definitions.

The paper suggests strategic planners need to plan for a multi-layered city that provides creative interfaces; facilitates 'ordinary' functions; and has space that services future population needs. If change does occur, there is a need to retain ownership of the terms on which those changes are made, and determinations should require no net loss of land or businesses and seek additional allocations relative to population growth.

Land use conflict from mixed use zoning is recognised, as well as certain actions that allow uses such as cafes and restaurants to operate in these precincts. The introduction of such uses can impact the integrity of productive industrial and urban service land by introducing land use conflicts which, in turn, often add operating constraints to businesses.

The paper highlights a nuanced approach is needed for the evolving uses of these spaces how to support the emergence of organic creative enterprises and local networks and avoid the risks of 'creative led' gentrification. This approach is underpinned by a 'no regrets' approach to decision making regarding industrial and urban services land.



It is noted that these lands need better planning and management that is responsive to market and community needs. GSC research indicates the importance of local proximity of industrial lands and urban services land has increased the most for the North District where industrial land value is almost double with rents 50 per cent greater and job density three times the region's average.

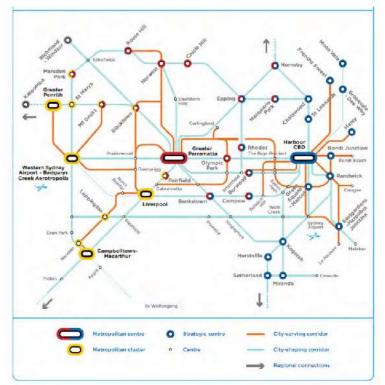
Future Transport 2056

northern beaches

council

Future Transport 2056 is the NSW Government's long-term transport strategy. The *Greater Sydney Services and Infrastructure Plan* provides transport infrastructure priorities and aims to achieve the aspiration of a 30-minute city set out in the GSRP. New and upgraded transport connections are identified for this purpose, as related to Figure 6.

FIGURE 6: CITY-SHAPING AND CITY-SERVING TRANSPORT NETWORKS FOR 2056, WITH SEVERAL NEW TRANSPORT CONNECTIONS THROUGH THE NORTHERN BEACHES LGA



Source: Transport for NSW 2018, Future Transport 2056 Greater Sydney Services and Infrastructure Plan

Implications for Employment & Economic Centres

The future transport infrastructure projects identified in the Northern Beaches LGA are:

Initiatives committed or for investigation (0-10 years):

- Northern Beaches B-line
- Northern Beaches Hospital Road Upgrade
- Improved bus services between Northern Beaches and Chatswood
- Beaches link.
- East-west public transport connection from Mona Vale to Macquarie Park.

Initiatives for investigation (20+ years):

Further investment in cycling connections within 5km of strategic centres.





2.2 Local Studies

Economic Development – Strategic Foundations Debrief (2019)

Behavioural Architects were engaged by Council to:

- Understand the appetite for Northern Beaches residents to work in the Northern Beaches
- Understand the appetite for businesses to base themselves in the Northern Beaches
- Define the barriers and generating ideas to overcome them.

The study was conducted in three stages: hypotheses development via a workshop and review of past studies; primary research with three focus groups; and a strategic foundations debrief and workshop with Council to prioritise ideas.

Implications for Employment & Economic Centres

Five key insights were determined from conversations with residents and businesses:

- 1. Awareness: there is a lack of awareness by residents and businesses in the Northern Beaches as seeing it as a credible business place, with perceptions anchored to the beaches as a place to relax.
- 2. Perceptions: Subsequently, employees and businesses based in Northern Beaches are perceived to be less serious.
- 3. Anchored to benefits: Residents working outside of Northern Beaches post rationalise their decisions and see significant benefits to working outside the Northern Beaches which they don't want to give up.
- 4. Framing of commute: The commute is famed as an opportunity for more me-time for all, however the possibilities within that time extend beyond admin and listening to podcasts for those who work in the Northern Beaches.
- 5. Habits: Habits are embedded for residents and businesses alike who are simply acting automatically when it comes to work. Life stage, such as having children, can act as an opportunity to change behaviour however outside of this there is little reason to change behaviour.

Three recommendations from the study included:

- 1. Encourage residents to work from home once a month by anchoring people to the benefits of working from home beyond current practical reasons.
- Target current businesses and create a sense of community and network to enable business growth within Northern Beaches – framing as a customer retention strategy.
- Raise awareness of the businesses and workforce based in Northern Beaches to change perceptions and attitudes. Targeting CFO's and CEO's with responsibility for planning office locations is key to changing behaviour.

Brookvale-Dee Why Transport Management and Accessibility Plan (2019)

The Brookvale-Dee Why Transport Management and Accessibility Plan is currently being completed.

The appropriate amount of growth in housing and jobs in Brookvale is dependent on the transport system. Council has engaged consultants to prepare a plan for the future operation and management of the road and transport network to ensure that growth in Brookvale does not exceed network capacity and that any necessary improvements are identified and prioritised.

The study will take stock of changes in development, population, travel patterns, roads and public transport and test scenarios for the future. It is Council's view that options for growth in employment and housing must be carefully considered on balance with traffic and





northern beaches council

transport constraints and that any growth in the area be supported by an appropriate level of infrastructure provision.

Shape 2028 Northern Beaches Community Strategic Plan – Northern Beaches Council (2018)

The Northern Beaches Council Community Strategic Plan is a 10-year strategic plan which sets the whole of council strategic direction. The plan includes vision, goals and objectives that provide direction for the growth and development of the council.

Community consultation formed the basis of the plan, the vision was formed out of 2,000 people's responses. The overarching vision is *"Northern Beaches – a safe, inclusive and connected community that lives in balance with our extraordinary coastal and bushland environment"*.

From the vision, the plan also articulates community outcomes which include:

- 1. Protection of the Environment
- 2. Places for People
- 3. Vibrant Local economy
 - Low unemployment rate
 - b. Well educated and highly skilled work force.
 - c. Lack of key local workers.
 - d. Lack of education and training opportunities.
- 4. Good governance.

In addition to this, extensive consultation revealed the LGA was concerned with taking care of the environment, traffic congestion, car dependency and a lack of public transport.

Implications for Employment & Economic Centres

The community strategic plan identifies several strategies that have implications for employment, these are consistent with the directives and actions that are contained in the GSRP and the Northern District Plan. The relevant strategies are listed below:

- Council has embedded a strategy in its community strategic plan to ensure that employment lands are retained and cater for a diverse range of businesses and industry
- Facilitate innovative environments and hubs where start-up businesses, entrepreneurs and innovators are supported and connected
- The Council seeks to facilitate local education
- The Council also supports telecommuting
- Activate urban centres and strategic centres to increase economic activity
- Provide a platform for diversified job growth and locate job growth and industry clusters in villages, strategic and district centres
- The Council also commits to improving public transport options and improving parking options in centres, villages and place.
- One of the goals is to ensure the community is stimulated through a range of creative activities including safe nightlife opportunities.

Placescore Community Insights Report – Northern Beaches Town Centres and Villages Centres (2018)

In 2018, 3261 people across the LGA engaged in a 'Placescore' survey which asked which place attributes were most important to in their ideal town centre.

Placescore included two data collection tools:

- Care factor that captures what attributes a community value
- PX assessment that captures how the community rates each attribute.





Together these two data sets identify priorities for a community.

Implications for Employment & Economic Centres

Key findings for the Northern Beaches Town and Village Centres included:

- For local residents, workers and visitors the aspects they ranked in order of importance for town centres (in rank order) included: elements of the natural environment (72%); cleanliness of public space (65%); outdoor restaurant, café and/or bar seating (58%); vegetation and natural elements (56%); and overall visual character of the area (54%).
- Main streets were performing at a score of 66 out of 100. The strongest place attributes were: welcoming to all people, sense of safety and interaction with locals. The weakest place attributes included public art, light features; unusual or unique buildings/design; and amenities and facilities.
- Priorities across the LGA, in order of priority, included: things to do in the evening, vegetation and natural elements, maintenance of public spaces and street furniture; elements of the natural environment, general condition of vegetation, street trees and other planting, and cleanliness of public spaces.

Community ideas for change largely centres around transport and increasing car accessibility and parking, facilitating active modes of transport and improving roads and traffic. Activation of public spaces was important and including more places to play, gather and relax. For the business realm, it was identified that more and better commercial diversity and local shops are needed, including in relation to bars, restaurants and cafes.

In relation to particular centres, notable features that were identified as important included:

Mona Vale	Car accessibility and parking
Dee Why	Walking paths that connect to other places
Brookvale	Car accessibility and parking
Manly	Evidence of public events happening; and active transport and public transport options
Avalon	Interaction with locals and other people in the area; businesses that reflect the local community and values
Newport	Businesses that reflect the local community and values; grocery and fresh food businesses; interaction with locals and other people in the area
North Narrabeen	Walking paths that connect to other places; active transport and public transport options
Narrabeen	Walking paths that connect to other places; active and public transport options
Collaroy	Walking paths that connect to other places; local history, heritage buildings or features; active transport or public transport options
Freshwater	Interaction with locals and other people on the area; grocery and fresh food businesses
Balgowlah	Local history, heritage buildings or features; walking paths that connect to other places





Seaforth	Service businesses; groceries and fresh food businesses
Forestville	Car accessibility and parking; grocery and fresh food businesses.

Frenchs Forest Planned Precinct (2018)

The report by MacroPlan 2018 provides advice on the likely retail and non-retail change that will occur in the Frenchs Forest Planned Precinct (FFPP) as a result of the Northern Beaches Hospital (NBH).

Overall, it was found that the FFPP had a demand for retail uses. Part 2 of the research conducted by MacroPlan considers alternate scenarios of development that are expected to follow from the NBH which is classified as a level five hospital. A Level 5 Hospital has a full-time director, experienced medical officers and staff on site 24 hours. The hospital also has undergraduate teaching and undertakes research¹.

The Hospital Precinct Structure Plan (HPSP) was adopted by Council in August 2017 and provides a 20-year vision for the development of Frenchs Forest as a Strategic Centre, with the development of a town centre and approximately 5,360 residential dwellings across three phases. The centrally located town centre, connected to the Northern Beaches Hospital, will be zoned B4 Mixed Use. There will potentially be 2,300 jobs.

Traffic modelling has indicated that in the short term, the precinct road network can support up to 3,000 dwellings concentrated around the town centre site with specific road and intersection upgrades. This is encompassed by Phase 1 of the HPSP, for which planning controls are currently being prepared. Phases 2 and 3 are dependent on delivery of major infrastructure works, including the Beaches Link Tunnel and an east-west bus rapid transit system from Dee Why to Chatswood, via Frenchs Forest.

The phasing strategy is indicated in Figure 7.

FIGURE 7: PHASING STRATEGY - HOSPITAL PRECINCT STRUCTURE PLAN





Source: https://yoursay.northernbeaches.nsw.gov.au/5402/documents/60675

<a>https://www.abs.gov.au/ausstats/abs@.nsf/Products/4390.0~2008-09~Glossary~Glossary>



¹ Australian Bureau of Statistics, 2010, viewed 15/04/19,



ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

Implications for Employment & Economic Centres

- Retail uses in the area are expected to increase. The main trade area population is estimated to grow from 51,730 people (2017) to 70,430 by 2036. The key retail catchment is expected to experience a total of 13,400 people by 2036.
- An additional 5,300 5,400 dwellings in the Northern Beaches Structure Plan catchment is expected to drive growth in the primary sector.
- The worker population is expected to grow from 10,000 people (2018) to 14,000 people by 2036.
- The FFPP should provide additional retail floor space to serve the primary trade area needs.
- The NBH level 5 hospital will be supported by its related and necessary services within the hospital building.
- The level 5 hospital will encourage the growth of non-retail health floor space in the area.
- The 60-hectare Frenchs Forest Business Park performs a local employment role.
 Findings suggest that the Business Park is currently underutilised, therefore the development of the hospital will help to stimulate growth in this underused area.
- Approximately 2,300 new jobs as indicated in the HPSP.

Northern Beaches Hospital - Planned Precinct Part Three Report Precinct Employment Strategy (2018)

The study by MacroPlanDimasi (2018) assessed the need for **retail and non-ancillary retail floorspace** at the NBH Town Centre Area. The study outlines the appropriate scale and time of such facilities and the potential economic impact that would result from retail development at the subject site. The Town Centre is planned to be a Mixed-Use urban core. The proposed town centre will be located at the currently occupied Frenchs Forest High School.

It is expected that some demand particularly for small scale retail facilities will be provided at the hospital, but these facilities will be limited. This means that demand from hospital workers, patients and visits could be captured by the NBH town centre subject site. The strategic location of the centre at the nexus of three main roads, including Warringah Road, will create additional demand from passing motorists.

Implications for Employment & Economic Centres

The study found the subject site could support:

- 22,5000 sqm of retail floorspace
- 5,000 sqm for ancillary uses.

The study also identified an undersupply of supermarket floorspace in the main trade area, thus recommendations suggest that an **additional supermarket** would be feasible in the area. The precinct will help to retain retail expenditure within the area that is currently leaking from the main trade area. This could minimise possible car trips for workers and reinforce the locality as a strategic centre. A retail development within the NBH Structure Plan precinct will help to facilitate the GSRPs and NDPs directives to establish the Precinct as a strategic centre.

In relation to Manly and Mona Vale Hospitals, it is noted that Northern Beaches Hospital will supersede these facilities for arrangements with universities and clinical/training schools. The Northern Beaches Hospital will include about 870 sqm of internal floorspace dedicated to teaching, training and research (to also be used by medical professionals undertaking vocational training). It is noted that unless another teaching affiliation is formed beyond University of Sydney, it is unlikely any additional health-related teaching space will be required immediately to service Northern Beaches Hospital.





Draft Brookvale Structure Plan (2018)

The Draft Brookvale Structure Plan 2018 informs the future growth of Brookvale. The Plan aligns with the GSRP and the North District Plan (NDP) by identifying Brookvale as a strategic centre for employment and growth. Extensive community consultation and subsequent engagement outcomes shaped the Draft Brookvale Structure Plan. Community consultation helped to identify issues and the vision for the centre's future. The plan also identified aspirations, development principles, development scenarios and a growth assessment to guide the development of the strategic centre. The aspirations of the community were used to guide the vision for the future town centre.

The aspirations that were identified are:

- 1. Secure and strengthen economic performance of Brookvale Strategic Centre
- 2. Achieve a self-sustaining centre
- 3. Create an integrated activity cluster
- 4. Shift away from car dependency
- 5. Enhance Brookvale's identity
- 6. Bring life to the streets
- 7. Link the beach to the bush
- 8. Upskill Brookvale.

A key principle of the Draft Plan is to recognise the importance of Brookvale's employment lands to the Northern Beaches which includes protecting industrial zoned land, whilst also responding to future changes in industry and encouraging additional employment generating uses. Increased residential potential is only to be considered in locations that will not diminish employment opportunities, will support existing commercial functions, and will be accessible to the B-Line.

The focus of the Draft Plan is to promote the growth and revitalisation of Brookvale as an employment focussed Strategic Centre.

Implications for Employment & Economic Centres

The Draft Plan identified the need to facilitate further development of the mixed-use town centre along Pittwater Road as a support area to surrounding employment lands in Brookvale. The focus of Warringah Mall as a retail core coupled with employment growth and residential growth was identified as the most viable and productive way to ensure sustainable growth and economic development in the centre.

Residential development is only envisaged within the traditional town centre either side of Pittwater Road between Powells and Windbourne Roads to revitalise the town centre as a support area to the surrounding employment lands. The aim of the Draft Plan is to achieve appropriate balance between growth in jobs and housing, in line with identified traffic constraints.

Specifically, Scenario Three was identified as the most feasible balance of residential and jobs growth (40/60 split) to promote revitalisation of the town centre and its continued function supporting the surrounding industrial and urban services land. Its viability is centred on the fact that residential and commercial development will be co-located. The vision and aspirations of the plan broadly align with the vision of the GSRP and the NDP. While many of the actions relate to Council operations, the Plan works towards securing a mixed-use area as well as a vibrant night-time economy.

The Draft Plan was developed prior to the directives of the Greater Sydney Commission to 'retain and manage' industrial and urban services lands (Objective 23 Greater Sydney Region Plan). This Draft Plan has been placed on hold awaiting direction from this employment study.





Macro-Economic and Demographic Factors Shaping Job Growth (2016)

The study by SGS Economics and Planning (2018) provides an overview of macroeconomic and demographic factors shaping job growth. SGS Economics and Planning analysed key factors and industries which included globalisation, the rise of Asia, domestic economic and demographic factors, domestic policy and regulation, technological improvements, online retail trade, education, industrial and freight and logistics and proportion of footloose jobs. The study provides broad trends and information on the implications these factors have on industries and their role in shaping job growth.

Implications for Employment & Economic Centres

- The health sector is experiencing growth the Northern Beaches Hospital at Frenchs Forest materialises this fact as the government continues to heavily invest in the health sector.
- Population is increasing across NSW. This trend can be seen in the Northern Beaches LGA.
- Footloose jobs are increasing as ICT and digital technologies improve.
- International student rates have increased dramatically in recent years.
- Like the GSRP and the NDP the study stresses the importance of retaining and managing industrial lands. The study acknowledged that there has been increasing pressure on employment lands from residential development as there is an intense demand for housing sites. This means that industrial and urban services lands in the Northern beaches should in fact be retained and viewed as important resources for the city.

Pittwater Marine Industry – Demographic and Economic Study (2016)

The study by Hill PDA (2016) analysed the economic impact and contribution of marine industries on the Pittwater waterway catchment. The purpose of the study was to educate the Council and the community on the marine industries role within the local economy. The study also provided commentary on the pressures that the marine industry will face in the future. The study found that the demographics of the area will lead to marine industry demand increases, this is due to both an ageing and affluent LGA.

Implications for Employment & Economic Centres

The study found that:

- Marine industry workers spent an estimated \$2.4 million on surrounding services during the week.
- In 2011, 4,000 people worked within the tourism industry. Pittwater Council collected \$255,000 within the 2014/15 financial year from dinghy storage.
- Boat ownership levels are projected to increase by 8,850 boats (+82 per cent) over a 26-year period to 2041.

Evidence suggests that the Pittwater Marine industry plays a role in the local economy and will continue to in the future. It is imperative that Council continues to support and facilitate the growth of the marine industry sector.

Strategic Centres – Enabling Economic Growth and Productivity (2015)

The study was commissioned by the Department of Planning and Environment to identify the key barriers to economic growth in metropolitan Sydney and their centres. Of relevance to the Northern Beaches Council are the centres which include the Northern Beaches Hospital Precinct and Brookvale-Dee Why centre. This study was used to guide the GSRP plans and therefore is aligned with the key objectives and directives of the plan.

Implications for Employment & Economic Centres

The study identified key elements that support economic development in centres which include:





- 1. Its accessibility
- 2. Its desirability
- 3. Its availability and viability.

The two identified employment centres must represent these three key elements to be economically sustainable in the future, this will facilitate and support continued growth.

Economic Impact Assessment Balgowlah Industrial Estate (2015)

The report assesses the economic impacts that are associated with the proposed rezoning of 5.8 hectares of IN2 Light Industrial Land at Balgowlah Industrial Estate to B6 Enterprise Corridor, see Figure 8. The study found that rezoning the land to B6 enterprise corridor would be feasible and it would facilitate a diverse employment capacity and therefore increase employment.

FIGURE 8: BALGOWLAH INDUSTRIAL ESTATE



Source: Urbis, 2015

Implications for Employment & Economic Centres

An analysis of industrial lands suggest that the area is tightly held and has low vacancy rates. Evidence recommends that employment lands should be retained to ensure that there is enough capacity for future growth. The study found that it was imperative that Council retain the industrial and urban services land at Balgowlah. Rezoning the areas from IN2 to B6 Enterprise Corridor would increase the capacity for a variety of industrial uses. This would be achieved by ensuring that all existing IN2 uses would be retained under B6 zoning.

Warringah Council Business Survey: Summary Report (2015)

In 2015, Warringah Council undertook its first LGA-wide business survey to better understand the diversity and structure of businesses in the local area; what are the challenges; and how local council and other stakeholders can assist local businesses to grow and prosper.

A total of 410 local businesses completed the survey and included a broad spread of industries. Majority of respondents were micro-businesses or non-employing and homebased businesses. Nearly 40 per cent of the businesses surveyed were home-based businesses. There was a comparable split between respondents that owned their premises and those that rented. About two-thirds of businesses had more than half their revenue from outside of Warringah LGA area. Many businesses had been in operation for 21 years or more or 10 to 20 years.

The top 20 challenges as cited by businesses included:





- Traffic and congestion
- Distance
- Public transport
- Internet speed
- Availability and cost of property
- Parking
- Attracting and retaining staff
- No major challengeCompetition from other centres
- Amenity and vibrancy
- Affordable housing for staff
- Council processes
- Major works
- Demographic change
- Loading zones and truck access
- Impact of residential development
- Conference and shared office space
- Business support and mentoring
- Crime and perceptions of safety
- Seasonal trade.

The most frequently cited challenges for the local business community were related to distance (for customers, clients, suppliers and staff); heavy traffic and congestion; limited public transport options and parking; poor internet connection. These challenges impact the businesses ability to expand and attract new customers and retain staff. Respondents also cited the provision of affordable housing to help business attract and retain staff as a key challenge.

For specific centres, it was noted that Brookvale and Frenchs Forest employment hubs had difficulty attracting and retaining staff, Dee Why town centre was noted as having a lack of vibrancy and facilities and poor amenity.

The lack of Council communication and understanding of business needs was also cited as a concern to local businesses.

Implications for Employment & Economic Centres

The survey identified five core work streams for Council:

- Information and collaboration greater business advice and mentoring, networking and research of local economic trends
- Advocacy particularly to State and Federal Government on infrastructure provision
- Urban design and local infrastructure improvements public domain and parking provision
- Marketing and promotion identifying key industries and locations to promote, business awards and events
- Council process improvements.

Warringah Employment Study (2013)

The employment study by SGS Economics and Planning analysed and reviewed economic trends and opportunities in the Warringah LGA. At the time of the study the Warringah Council was identified as one of the four councils which was within the Shore Regional Organisation of Council (SHROC). This organisation created a partnership between Manly, Mosman, Warringah and Pittwater Councils.

In 2013, Warringah was recorded to have the highest number of jobs in employment lands with around 45, 540 jobs which represented 60 per cent of all jobs in the subregion. The





study also found that Warringah and the North East subregion had a high level of employment and self-containment.

Implications for Employment & Economic Centres

The study provided council with quantitative evidence to guide the future employment in Warringah. The study created several actions that had implication for employment. For instance, the study recommended that the Council should:

- Restrict subdivision and strata titling of industrial lots to prevent fragmentation
- Commit to sustaining the employment lands retain and manage industrial lands
- Preserve IN1 General Industrial Zone in Cromer and Brookvale Industrial West.

Pittwater Economic Development Plan (2011)

The former Pittwater Economic Development Plan was made up of a series of discussion papers addressing topics relating to the area's economic challenges and opportunities for economic development and business growth.

These included:

- 1. Council economic role and function analysis
- 2. Towns and villages
- 3. The importance of business infrastructure and networks
- 4. The Pittwater Economy and Infrastructure
- 5. Strengthening the Local Economy
- 6. Pittwater in the Broader Economic and Geographical Context
- 7. Emerging Business Issues and Opportunities.

Implications for Employment & Economic Centres

Each discussion paper identified opportunity areas which have informed economic development actions within the subsequent Pittwater Operational Plans. Generally, it was found that Pittwater had natural environmental advantages which create a strong opportunity for education and tourism. The discussion papers recognised the need for greater tourism investment in Pittwater, for instance the visitation of tourist numbers particularly in village centres was low. The study found that the tourism sector in Pittwater is underdeveloped, this was attributed to a lack of Council promotion.

Warringah Economic Development Plan (2011)

The plan seeks to secure a growing economy in the region. The plan identifies four overarching themes which include:

- 1. Growing employment opportunities
 - Developing a strong local economy which promotes innovations, builds a skilled and educated workforce and contributes to a high quality of life for the community.
- 2. Council providing information, support and advice
 - Could will provide support to increase business engagement and awareness of the contribution of business, build business capability and promote and strengthen the areas competitiveness.
- 3. Advocate for local and regional initiatives
 - Recognising the importance for local and regional economies associated with decision projects such as transport, jobs and infrastructure, which supports economic development.
- 4. Connectivity, engagement and communication



 Installing and fostering business networks, partnerships and other mechanisms to connect, promote and grow business.

Implications for Employment & Economic Centres

- Capitalise on the natural assets and stimulate growth in the tourist economy.
- Support a range of local/regional business clusters.
- Focus on activating the strategic centre of Brookvale Dee Why as a distinctive and attractive business location in the Northern Beaches.

Manly Industrial Zone - Masterplan (2011)

HASSELL was commissioned by the Council in 2011 to restructure the Manly Industrial Park. The new plan worked towards improving urban design. The plan sought to address issues that were associated with poor movement, land use structure, pedestrian amenity and the streetscape of the industrial park, as related to Figure 9.

FIGURE 9: MANLY INDUSTRIAL ZONE MASTERPLAN



Source: Hassell, 2013

Implications for Employment & Economic Centres

- Permitting the B6 Enterprise and the IN2 Industry Zones in the park to encourage growth and diversity within the precinct.
- The masterplan provided a cohesive approach to the development of Manly Industrial Park. The focus was to retain the important industrial and urban services land.
- Improvements to the internal movement, linkages, built form and amenity of the industrial park worked towards facilitating growth and development in the industrial park.

SHOROC Employment Lands Addendum

A report by HillPDA analysed the employment lands of the SHROC region and provides detailed analysis on future forecasts for growing job sectors. The study also provides numerical data on the amount of retail, commercial and industrial floor space that will be required in the area by 2031.

Implications for Employment & Economic Centres

Forecasted an **additional 22,170 jobs** within the SHOROC region between 2011 – 2031.





- Industries representing the highest growth include health care and social assistance with 5761 jobs and Professional, Scientific and Technical Services jobs with 5,442 additional jobs.
- Of relevance to the Northern Beaches council is the Manly LGA which is expected to have an additional 2,316 jobs by 2031. The study found that most of this growth will occur in Health Care and Social Assistance and Education and Training.
- The Pittwater LGA is expected to have an additional 5,076 jobs by 2032. Most of this
 job growth will occur in the Health Care and Social Assistance and Professional,
 Scientific and Technical services.
- Warringah is estimated to experience a job increase of 12,816 jobs which represents a 22 per cent increase. Interestingly growth will be concentrated around Professional Scientific and Technical services job and retail trade jobs. Health Care and Social Assistance in this instance has the third highest growth with an additional 2750 jobs.

SHOROCC Visitor Economy Opportunities Paper

The paper provides guidance on the potential for expanding the visitor economy of the Northern beaches. The study provides an analysis of the barriers to achieving economic growth in the Manly LGA. Of note is the missed opportunities that have been identified in the tourism industry.

Implications for Employment & Economic Centres

This high-level study found that:

- The Northern Beaches offers an attractive holiday destination with several beaches, walking trails and cycling trails. The area also offers a range of recreational uses.
- There is a clear focus to strengthen the use of the National Parks and Harbour Foreshore areas for outdoor base infrastructure and recreational experiences.
- The study found that accessibility to the Northern Beaches is compromised by a congested road network.
- Manly is identified as a traditional tourism hub, however, the centre is compromised by accessibility issues.
- The region was also found to lack commercial short-term accommodation facilitates. Anecdotal evidence suggest that such development would be opposed as the nimby concern is prevalent within the LGA.
- Opportunity to ease traffic congestion by investigating travel by water. It is suggested that the area could capitalise on the existing marine infrastructure in the area.
- The study also found that current trails and areas could capitalise and promote the heritage walking trails.
- There is a lack of car parking facilities it should be a priority to expand carpark facilities in the area.
- The study revealed that there is tension within the LGA about tourism growth. This should be investigated in the future.
- Night-time activity should be investigated, activation at night could be facilitate by smaller scale family night-time events.

Manly 2015 Masterplan Economic Assessment (2013)

The Hill PDA Discussion Paper investigated the Manly Precinct Plan (2015) and worked towards quantifying the economic benefits of the proposed masterplan. The economic assessment recognises the need for revitalisation within the Manly Town Centre and found that this could stimulate the local economy. The plan proposed a variety of key elements (see Figure 10) which worked towards increasing public amenity, calming traffic, increasing the





opportunity for active transport, revitalising Manly laneways (which were identified as being unsafe at night) and increasing carparking capacity.

FIGURE 10: MANLY MASTERPLAN

T	he 7 Key Elements of MANLY2015 are:	
1.	'Gateway Plaza' (current intersection of Sydney Road and Belgrave Street)	
2.	'Grand Boulevard' (Belgrave Street)	MAN THE AND THE AND THE AND
3.	'Village Centre' (Market Place / Manly Library and Whistler Street)	
4.	'North Quarter' (incorporating Raglan Street, Central Avenue, Short Street and Henrietta Lane)	The states
5.	'High Street' (Sydney Road)	13
5.	'Beach Terrace' (Ocean end of The Corso)	and on Lynn 2 and A
7.	'Manly Oval' (Incorporating a new underground carpark)	
No	te: No changes are proposed to Manly Wharf.	

Source: Hill PDA Architects, 2013

Implications for Employment & Economic Centres

The study quantified and highlighted the economic benefits that the 2015 Masterplan would bring to the Council. The study found that issues such as accessibility, safety and traffic congestion could be remedied by investing in urban design improvements and supporting infrastructure development such as car parking to increase accessibility. The study helped to facilitate future growth and development within the Manly area. Key findings indicate the economic impact that the Masterplan would have on the town centre. It was found that the Manly Oval underground car park and the Whistler street carpark and developments within close proximity would contribute positively to the local economy in Manly where:

- Incorporating parking into the Manly oval would attract \$15 million of retail expenditure.
- The redevelopment of Whistler Street Car Park would:
 - Create 50 new residential dwellings for locals leading to an additional \$1.6million in retail expenditure per annum.
 - Close to \$15million of construction works leading to the direct generation of 42 jobs per year.

2.3 Statutory Planning Context

Six main planning instruments apply to the Northern Beaches LGA. Statutory requirements are largely set out in the Manly Local Environmental Plan (2013), Pittwater LEP (2014), and the Warringah LEP (2011). The statutory planning context aligns with the strategic planning framework for the Northern Beaches.

Manly Local Environmental Plan (2013)

The LEP establishes statutory requirements for development. Land use controls identify what types of development are permissible. The aim of the plan seeks to foster economic,





environmental and social welfare so that Manly continues to develop as an accessible, sustainable, prosperous and safe place to live, work or visit. The aims of the plans identify the importance of providing diverse affordable housing, high-quality built form outcomes. Tourism is also specifically recognised, and it addresses issues such as minimising car dependency.

Implications for Employment & Economic Centres

The LEP supports the growth and development of tourism and broadly aims to increase economic activity particularly in the Manly centre.

Manly Development Control Plan

The Manly Development Control Plan identifies a range of special character areas and sites which include specific design requirements. The plan identifies the importance of quality design and activation. Central to the plan is also the identification of local character which is set to be retained.

Implications for Employment & Economic Centres

- The plan identifies the need to facilitate growth particularly in B6 Corridors.
- Creates controls and parameters to ensure that development is economically sustainable.
- The plan identifies Manly as the predominant town centre in the area.
- Other lower scale neighbourhood centres include Balgowlah, Fairlight and Seaforth. These areas are identified by a unique townscape character that is to be retained in the future. These centres provide personal services and rely on convenience retailing.

Pittwater Local Environmental Plan (2014)

The Pittwater LEP includes the following objectives:

- To promote development in Pittwater that is economically, environmentally and socially sustainable
- To ensure development is consistent with the desired character of Pittwater's localities
- To support a range of mixed-use centres that adequately provide for the needs of the Pittwater community
- To retain and enhance land used for employment purposes that is needed to meet the economic and employment needs of the community both now and in the future
- To improve access throughout Pittwater, facilitate the use of public transport and encourage walking and cycling
- To encourage a range of housing in appropriate locations that provides for the needs of the community both now and in the future
- To protect and enhance Pittwater's natural environment and recreation areas,
- To conserve Pittwater's European and Aboriginal heritage
- To minimise risks to the community in areas subject to environmental hazards including climate change
- To protect and promote the health and well-being of current and future residents of Pittwater.

Implications for Employment & Economic Centres

- The Pittwater development control plan identifies and supports a range of mixed-use centres.
- The plan also identifies the need to retain and enhance land use for employment purposes.
- The plan supports and promotes sustainable economic development.





Pittwater Development Control Plan

The Pittwater Development Control Plan (2013) provides planning and design requirements to retain the character of areas and to guide new development in areas. The plan aligns with the Pittwater Local Environmental Plan (2014) and identifies several centres which are identified for being important places within the LGA where people live work, and play,

Implications for Employment & Economic Centres

The Pittwater Development Control Plan (2013) identifies 16 localities. Broadly, the localities are made up by small neighbourhood village type centres. Despite this, the plan identifies the Mona Vale centre as the main commercial centre for the Pittwater area. This aligns with the GSRP which identifies Mona Vale as a strategic centre. The DCP supports the economic growth in Pittwater. For instance, the heights in the local centre were increased to facilitate the development of the local economy.

The DCP encourages a mix of employment. Villages/localities such as Bilgola and Newport are recognised for their low-density village feel and community focus which is set to be retained. Mixed land uses are encouraged in these village centres which supports the co-location of services, employment and housing in local settings.

Warringah Local Environmental Plan (2011)

The Warringah LEP includes the following objectives:

- To create a land use framework for controlling development in Warringah that allows detailed provisions to be made in any development control plan made by the Council
- To recognise the role of Dee Why and Brookvale as the major centres and employment areas for the sub-region
- To maintain and enhance the existing amenity and quality of life of the local community by providing for a balance of development that caters for the housing, employment, entertainment, cultural, welfare and recreational needs of residents and visitors
- Protect and enhance the residential use and amenity of existing residential environments
- Promote development that is compatible with neighbouring development in terms of bulk, scale and appearance
- Increase the availability and variety of dwellings to enable population growth without having adverse effects on the character and amenity of Warringah.

In relation to non-residential development to:

- Ensure that non-residential development does not have an adverse effect on the amenity of residential properties and public places
- Maintain a diversity of employment, services, cultural and recreational facilities.

In relation to environmental quality to:

- Achieve development outcomes of quality urban design
- Encourage development that demonstrates efficient and sustainable use of energy and resources
- Achieve land use relationships that promote the efficient use of infrastructure
- ensure that development does not have an adverse effect on streetscapes and vistas, public places, areas visible from navigable waters or the natural environment
- Protect, conserve and manage biodiversity and the natural environment
- Manage environmental constraints to development including acid sulphate soils, land slip risk, flood and tidal inundation, coastal erosion and biodiversity.

In relation to environmental heritage:





 To recognise, protect and conserve items and areas of natural, indigenous and built heritage that contribute to the environmental and cultural heritage of Warringah.

In relation to community well-being to:

- Ensure good management of public assets and promote opportunities for social cultural and community activities
- Ensure that the social and economic effects of development are appropriate.

Implications for Employment & Economic Centres

- Identifies the need to support the diversification of employment.
- Similarly, to the GSRP and the NDP, WLEP (2011) identifies the role of Dee Why and Brookvale as major centres and employment areas for the region.

Warringah Development Control Plan (2011)

The Warringah Development Control Plan 2011 defines the desired future character of the LGA and provides specific controls for key centres such as the Dee Why Centre, Warringah Mall and the Freshwater village.

Implications for Employment & Economic Centres

- The plan identifies Dee Why as a mixed-use area. The plan recognises the importance
 of Dee Why as a main centre for the LGA which broadly aligns with the objectives and
 directives of the GSRP and the NDP.
- Warringah Mall is also identified specifically in the Development Control Plan. The
 objectives are mainly focusing on ensuring that the development does not detract
 from the amenity of the area. This is achieved through design quality and excellencebuilt form outcomes.
- Freshwater is identified as a local centre which has a focus on community life where
 people can easily go about their daily activities. This smaller type centre provides
 retail and community facilities.





2.4 Key Findings

Northern Beaches Health and Education Precinct

Significant investment into the Northern Beaches Hospital Precinct will secure its role as a strategic centre. Policy directions recognise the need to plan for and grow this precinct strategically to ensure that the LGA can expand these industries through innovations. The hospital and investments are expected to stimulate the economy and provide a greater number of jobs in the area.

Employment growth

Growing local job opportunities and ensuring efficient access to these jobs is also a key focal point. The strategic centres are the main locations for job growth in the LGA and include the Northern Beaches Health and Education Precinct, Brookvale – Dee Why, Manly and Mona Vale.

Supporting growth that is well designed and sensitive to the natural and built environment

Smaller localities are identified as having strong local character which should be retained. Any increases in density and expansion need to ensure high-quality built environment results, therefore improving amenity and increasing safety and vibrancy. For local residents, workers and visitors, elements of the natural environment and maintenance of public spaces are highly valued.

Supporting local interaction, accessibility via all modes and access to fresh food in smaller, local centres

The community identified that interaction with local and other people in the area; access to groceries and fresh food businesses; walking paths that connect to other places; as well as car accessibility and parking and public/active transport access are all important and valued to the community.

Strategic focus on job accessibility

Land use planning policy broadly supports urban redevelopment of increased densities to create a 30-minute city.

Investigate tourism growth

The Northern Beaches LGA contains a variety of beautiful natural assets. Policy recognises the need to investigate the tourism industry as it presents as a key opportunity for economic growth.

Policy focus on the protection of industrial lands

Regional policy identifies the importance of industrial lands, because of this, industrial precincts around the LGA will be retained and managed. A key focus is ensuring that the uses of these areas are diversified to encourage a greater capacity of employment and facilitate a range of employment opportunities.

Investigate the tension between car parking and public transport in areas that are centred around public transport nodes

Various measures have been suggested for carparking in Manly Town Centre, as well as separate discussion to increase density around public transport nodes. Further policy should work towards facilitating and encouraging public transport usage, particularly in areas that are well serviced by ferry and rapid bus services. This will also help to manage and ameliorate traffic congestion issues that are experienced throughout the LGA as employment centres grow.





Facilitate innovative environments and hubs where start-up businesses, entrepreneurs and innovators are supported and connected

The rise of footloose jobs and digital technologies has been recognised, alongside the need to support local job growth and develop a strong local economy that promotes innovation and fosters business networks.

Distance

The issue of distance to suppliers, clients, staff and customers was a key concern for local businesses in the area. This has been compounded by traffic congestion and a lack of public transport options and parking in centres.

Support development of the night-time economy

Feedback from the community indicates having a range of night-time activities in a safe environment is a priority for the community and also a goal of Council. Ensuring the economic activity centres, in relation to urban design, business offerings and programs and activities in the LGA to support this will be key.

Awareness, perception and habits impact business development in the Northern Beaches

Residents and businesses are not aware of the business, workforce and professional environment of the Northern Beaches. The area is largely perceived as a place to relax and spend downtime and local residents and businesses tend to act automatically when it comes to work (ie: place of work is considered outside of the Northern Beaches). It has been identified there is a need to create a better sense of network within the business community, change perceptions and attitudes and encourage residents to work from home.





3. SOCIO-ECONOMIC PROFILE

This chapter provides an overview of relevant socio-economic census data and identifies key insights that will inform the development of the employment and centres strategy. Data has been drawn from the Northern Beaches Demographic Analysis Study also completed by SGS Economics & Planning, alongside some additional employment analysis².

3.1 Population

The population section profiles the residents of the Northern Beaches LGA across a number of social and economic indicators.

Population

Population is an important consideration in the development of an economic strategy, as population growth is closely tied to the need for future population serving jobs such as retail, health and education.

Northern Beaches LGA has had:

- Growth of 15,235 people between the years 2011-2016 with most growth occurring in the Brookvale-Dee Why catchment (+7,090). This was nearly twice as high as the Mona Vale (+3,272) and Manly (+3,122) catchments, see Table 1.
- The five-year growth rate between the 2006 and 2016 was 5.99 per cent for the LGA which was lower than Greater Sydney (8.47 per cent) and slightly higher than the North District (5.35 per cent), see Table 2.
- Population density per square kilometre has increased across the LGA by 6.09 per cent between 2011-2016. Population density growth was highest in the Brookvale-Dee Why catchment at 8.21 per cent, followed by Manly at 5.63 per cent and then Frenchs Forest and Mona Vale at 4.69 and 4.63 per cent respectively, see Table 3.
- Comparative population density suggests the Northern Beaches is similar to Greater Sydney at 2,675 and 2,623 persons per square kilometre respectively in 2016, see Table 3.

Geography	2011	2016	Growth	CAGR (5-yr %)
Mona Vale	57,170	60,442	3,272	5.72%
Terrey Hills	3,531	3,653	122	3.46%
Frenchs Forest	36,387	37,998	1,611	4.43%
Brookvale-Dee Why	84,987	92,077	7,090	8.34%
Manly	55,620	58,742	3,122	5.61%
Total	237,641	252,876	15,235	6.40%

TABLE 1: BROADER CATCHMENTS POPULATION TOTALS AND GROWTH RATES (2011-2016)

Source: ABS Census 2011 and 2016 (TableBuilder Pro)

² Appendix 2 includes explanation notes about data analysis.





TABLE 2: COMPARATIVE POPULATION TOTALS AND GROWTH RATES (2006-2016)

Geography	2006	2011	2016	Growth	CAGR (5-yr %)
Greater Sydney	3,821,233	4,079,432	4,496,184	674,951	8.47%
North District	766,240	808,651	850,382	84,142	5.35%
Northern Beaches	225,109	237,641	252,876	27,767	5.99%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

TABLE 3: BROADER CATCHMENTS POPULATION DENSITY (PER KM²) TOTALS AND GROWTH RATES (2011-2016)

Geography	2011	2016	Growth (%)
Mona Vale	1,942	2,032	4.63%
Terrey Hills	350	362	3.46%
Frenchs Forest	1,788	1,872	4.69%
Brookvale-Dee Why	3,962	4,287	8.21%
Manly	4,302	4,544	5.63%
Total	2,521	2,675	6.09%

Source: ABS Census 2011 and 2016 (TableBuilder Pro), DPE - Standard Instrument Local Environmental Plan (LEP) - Land Use Zoning (LZN), 2018

The Northern Beaches LGA is forecast to have lower growth rates than the Greater Sydney region and the North District. Transport for NSW and the Department of Planning & Environment expect an increase of 26,015 people between 2021 and 2036 for the LGA which represents an additional 3.16 per cent each five years. Greater Sydney and the North District is forecasted at 7.94 and 4.91 per cent respectively.

Age Profile & Migration

Age profile reports the breakdown of the age of the population by range. While not an economic indicator, age profile is an important consideration in the development of an economic strategy as population growth is closely tied to the need for future population serving, health and social infrastructure related services.

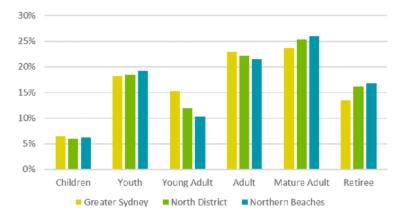
Northern Beaches LGA:

- Has an increasingly ageing population, where retirees (+65 years) have a compound annual growth rate at 12.31 per cent between 2006 and 2016 that is higher than growth rates for youth (5-20 years) and mature adults (45-65 years) at 9.39 per cent and 8.53 per cent respectively.
- Slightly more retirees are located in the Mona Vale, Terrey Hills and Frenchs Forest catchment areas, whereas Brookvale-Dee Why and Manly catchments tend to have higher proportions of mature adults, adults and youth.
- Has a larger proportion of retirees, mature adults and youth compared to Greater Sydney and the North District and a smaller proportion of young adults (20-30 years) and adults (30-45 years), see Figure 11.
- Into the future, forecasts predict a continued increase in the number of retirees, mature adults and young adults, while youth will stagnate.









Source: ABS Census 2016 (TableBuilder Pro)

Majority of people moving to the Northern Beaches are coming from other parts of Australia – mostly Sydney. There are, however, larger numbers of overseas migrants locating in Manly and Brookvale-Dee Why. Overseas migrants tend to have a higher proportion of Adults and Young Adults. If these trends persevere, the workforce in Northern Beaches will be largely derived from overseas migrants.

Labour Force Status (PUR - resident workers)

The labour force status (Place of Usual Residence) indicator reports the employment profile of Northern Beaches resident population.

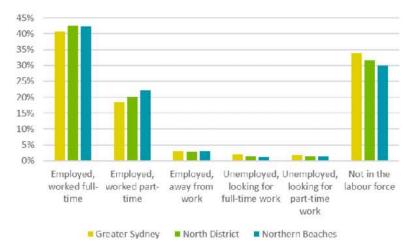
Northern Beaches LGA has:

- A similar proportion of people employed in full-time jobs as Greater Sydney and the North District, at approximately 42 per cent of the labour force.
- More people are employed part-time at approximately 23 per cent and less people that are not in the labour force at 30 per cent when compared to Greater Sydney and the North District, see Figure 12.
- Between 2006 and 2016 there has been an increase in persons employed parttime and decreases in those persons employed full-time and not in the labour force, see Figure 13.



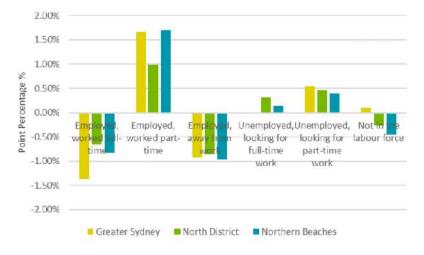


FIGURE 12: COMPARATIVE LABOUR FORCE STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

FIGURE 13: COMPARATIVE PROPORTIONAL CHANGE IN LABOUR FORCE STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Industry of Employment (PUR - resident workers)

The industry of employment (Place of Usual Residence) indicator reports the industries that residents work in. Industries have been aggregated to four Broad Industry Categories (BICs), as defined by the Greater Sydney Commission. The BICs are an aggregation of the various 1-digit ANZSIC categories that define industries within the economy.

Northern Beaches LGA:

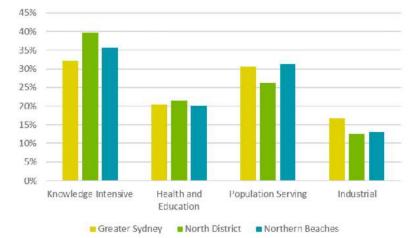
- Most residents work in knowledge intensive industries and population servicing industries at approximately 32 and 31 per cent. Industrial jobs are lower than Greater Sydney, see Figure 14.
- Between 2006 and 2016, the proportion of knowledge intensive and health and education jobs held by local residents has increased in the LGA, whereas population serving jobs only experienced a small increase and industrial jobs undertaken by residents decreased, see Figure 15.





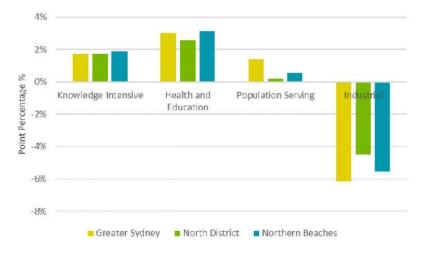
 Residents in the Manly catchment have a higher share of knowledge related jobs and less population serving jobs when compared to the rest of the LGA; residents working in health and education jobs are generally equally distributed across the LGA, see Table 4.

FIGURE 14: COMPARATIVE INDUSTRY OF EMPLOYMENT (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

FIGURE 15: COMPARATIVE PROPORTIONAL CHANGE IN INDUSTRY OF EMPLOYMENT (PUR) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

TABLE 4: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (PUR) PROPORTIONS (2016)

Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Mona Vale	31%	21%	34%	14%
Terrey Hills	31%	19%	34%	15%
Frenchs Forest	36%	22%	30%	12%

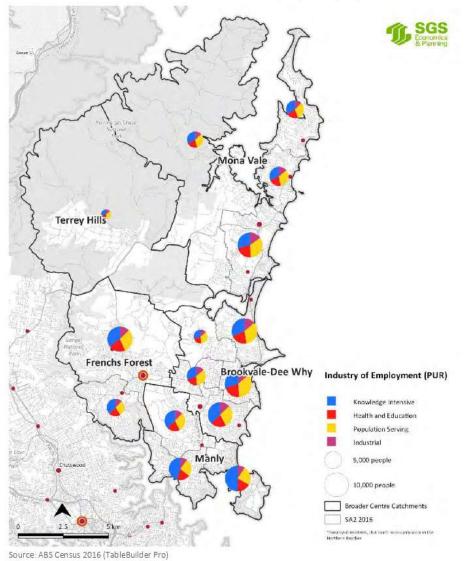




Brookvale-Dee Why	33%	20%	34%	13%
Manly	45%	19%	26%	10%
Total	36%	20%	31%	13%

Source: ABS Census 2016 (TableBuilder Pro)

FIGURE 16: BROADER CATCHMENTS INDUSTRY OF EMPLOYMENT (PUR) - MAP (2016)





The most common occupations amongst Northern Beaches residents are in the *Professionals*, and *Managers* categories. High ratios of these residents are located in the suburbs of *Manly-Fairlight*, *Balgowlah-Clontarf-Seaforth*, with higher rates elsewhere in the LGA as well (e.g. *Frenchs Forest* broader catchment, *Brookvale-Freshwater*)

Areas such as *Beacon Hill-Narraweena* and *Dee Why-North Curl* have higher ratios of industrial workers (*Technicians and Trades Workers, Labourers* and *Machinery Operators and Drivers*) while suburbs with major retail outlets have larger numbers of *Sales Workers* (*Warriewood-Mona Vale* and *Freshwater-Brookvale*).

TABLE 5: BROADER CATCHMENTS OCCUPATION (PUR) TOTALS (2016)

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrativ e Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Mona Vale	5,628	8,046	3,852	2,869	4,167	2,839	786	1,465
Terrey Hills	354	436	262	155	267	149	47	108
Frenchs Forest	3,513	5,357	1,752	1,553	2,624	1,719	453	815
Brookvale-Dee Why	8,018	12,504	6,437	5,066	6,751	4,533	1,752	3,144
Manly	6,557	10,747	2,404	2,588	3,677	2,558	522	1,093
Total	24,080	37,085	14,707	12,241	17,482	11,801	3,557	6,621

Source: ABS Census 2016 (TableBuilder Pro)

TABLE 6: BROADER CATCHMENTS OCCUPATION (PUR) TOTALS (2016)

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrativ e Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Mona Vale	19%	27%	13%	10%	14%	10%	3%	5%
Terrey Hills	20%	25%	15%	9%	15%	8%	3%	6%
Frenchs Forest	20%	30%	10%	9%	15%	10%	3%	5%
Brookvale-Dee Why	17%	26%	13%	11%	14%	9%	4%	7%
Manly	22%	36%	8%	9%	12%	8%	2%	4%
Total	19%	29%	12%	10%	14%	9%	3%	5%

Source: ABS Census 2016 (TableBuilder Pro)

Between 2006 and 2016, the largest increase has occurred in the *Professionals, Managers* and *Community and Personal Service Workers* occupations. All other occupations have either remained relatively stagnant or experienced a decline, in particular the *Clerical and Administrative Workers* group.

TABLE 7: LOCAL	OCCUPATION	(PUR) TOTA	ALS AND GRO	WTH RATES	(2006-2016)

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers	Machinery Operators and Drivers	Labourers
2016	24,080	37,085	14,707	12,241	17,482	11,801	3,557	6,621
2011	21,075	34,207	14,461	10,702	18,191	11,352	3,516	6,148
2006	19,403	30,720	14,235	9,470	18,137	11,391	3,629	6,589
Growth (Total)	4,677	6,365	472	2,771	-655	410	-72	32
CAGR (5-yr %)	11.40%	9.87%	1.64%	13.69%	-1.82%	1.78%	-1.00%	0.24%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)





Method of Travel to Work (PUR - resident workers)

The method of travel to work (Place of Usual Residence) indicator reports how residents access their jobs.

For Northern Beaches LGA:

- Majority of residents use vehicles to travel to work at approximately 77 per cent, whereas only 20 per cent of residents use public transport to access work.
- Figure 17 highlights how different catchments in the LGA travel to work. Around Manly there is greater public transport use. Vehicle use increases moving further north of the LGA.
- Public transport use to access work has increased by approximately three per cent between 2006-2016 and vehicle use has decreased by approximately four per cent.
- Working from home has increased slightly during the period 2006-2016 at about one per cent, see Figure 18.

FIGURE 17: BROADER CATCHMENTS METHOD OF TRAVEL TO WORK (PUR) - MAP (2016)

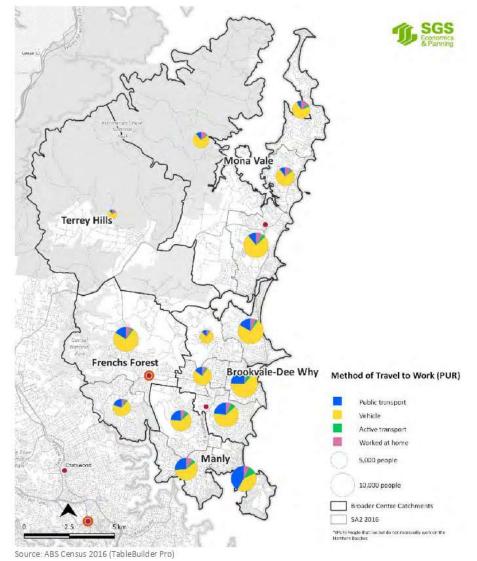








FIGURE 18: COMPARATIVE PROPORTIONAL CHANGE IN METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

3.2 Employment

The employment section profiles the jobs that locate in Northern Beaches LGA.

Employment (POW)

Between the 2011 and 2016 Census periods, Place of Work statistics show an additional 5,993 jobs have been generated on the Northern Beaches, with the Manly catchment having the highest growth rate, almost double of any other catchment. The Brookvale-Dee Why catchment is the major employment area.

Figure 19 illustrates these employment growth findings (note the growth figure in Table 8 is related to the spatial area of 'Broader Centre Catchment' and the numeric growth figure in Figure 19 is related spatially to 'SA2s').

Geography	2011	2016	Growth	CAGR (5-yr %)
Mona Vale	16,901	18,693	1,792	10.60%
Terrey Hills	1,854	2,028	174	9.39%
Frenchs Forest	13,844	14,757	913	6.59%
Brookvale-Dee Why	25,020	27,492	2,472	9.88%
Manly	12,563	15,052	2,489	19.81%
Total	76,715	82,708	5,993	7.81%

TABLE 8: BROADER CATCHMENTS EMPLOYMENT TOTALS AND GROWTH RATES (2011-2016)

Source: ABS Census 2011 and 2016 (TableBuilder Pro)



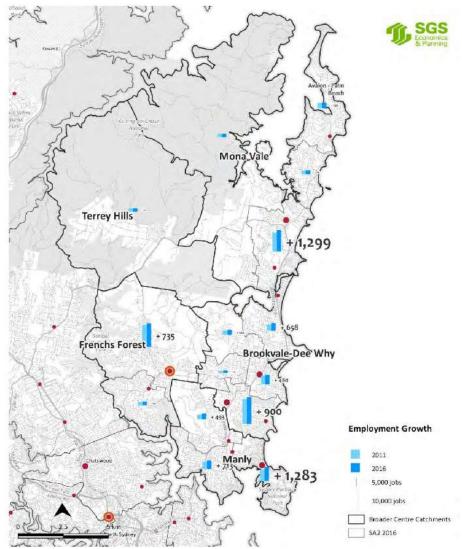


FIGURE 19: EMPLOYMENT GROWTH 2011-2016 BY SA2

Source : SGS, 2019





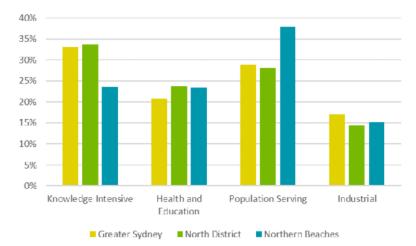
Industry of Employment (POW)

The industry of employment (Place of Work) indicator highlights the profile of jobs that are located in the LGA, regardless of whether the jobs are filled by local residents or people from outside the LGA.

Northern Beaches LGA:

- Has a strong presence of population serving industries compared to Greater Sydney and the North District and a slightly higher proportion of health and education workers than Greater Sydney. There is significantly less knowledge intensive workers located in the LGA than compared to Greater Sydney and the North District, see Figure 20.
- Has experienced growth in health and education industries, higher than Greater Sydney and the North District. Industrial industries are in decline in the LGA, a similar occurrence seen across Greater Sydney and the North District, see Figure 21.

FIGURE 20: COMPARATIVE INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)





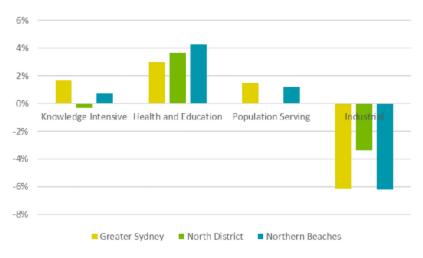


FIGURE 21: COMPARATIVE PROPORTIONAL CHANGE IN INDUSTRY OF EMPLOYMENT (POW) STRUCTURE (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Occupation (POW)

The occupation (Place of Work) indicator reports the types of jobs people work within the LGA.

Northern Beaches LGA has:

- Slightly more professional jobs located in Manly and Frenchs Forest catchment; a slightly higher proportion of technician and trade jobs and machinery operator and driver jobs located in Terrey Hills catchment; and a slightly higher proportion of sales workers in the Mona Vale, Brookvale-Dee Why and Manly catchments, see Table 9.
- A relatively similar occupation structure to Greater Sydney and the North District but noticeably lesser proportion of professional and higher levels of technicians and trades workers, community and personal service workers and sales workers, see Figure 22.
- Experienced an increase in the proportion of professionals and community and personal services workers. Growth of community and personal services workers was higher than Greater Sydney and the North District. There has been a decline in clerical and administrative workers and sales workers, see Figure 23.

Year	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrativ e Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Mona Vale	15%	24%	15%	11%	14%	11%	4%	7%
Terrey Hills	14%	19%	19%	13%	10%	5%	10%	10%
Frenchs Forest	17%	28%	10%	10%	15%	9%	4%	6%
Brookvale-Dee Why	14%	20%	15%	11%	14%	13%	6%	8%
Manly	14%	29%	11%	16%	11%	11%	2%	7%
Total	15%	24%	13%	12%	14%	11%	4%	7%

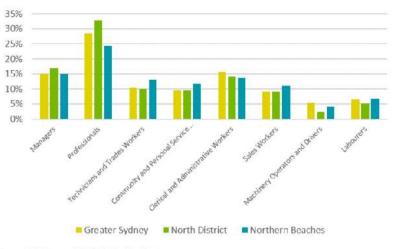
TABLE 9: BROADER CATCHMENTS OCCUPATION (POW) PROPORTIONS (2016)

Source: ABS Census 2016 (TableBuilder Pro)



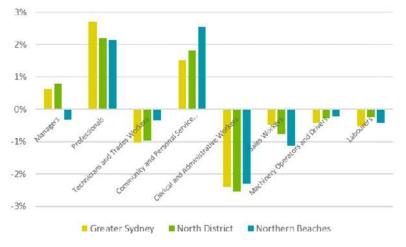


FIGURE 22: COMPARATIVE OCCUPATION (POW) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

FIGURE 23: COMPARATIVE PROPORTIONAL CHANGE IN OCCUPATION (POW) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

Resident Workforce and Local Jobs

Figure 24 analyses the growth total of employment across the four Broad Industry Classifications between the resident workforce of the Northern Beaches and the local jobs that have been generated over the 10 years between 2006-16.

It shows that the number of Knowledge Intensive workers (6,035) has increased significantly more than the number of Knowledge Intensive jobs that have been generated locally in the region (2,292).

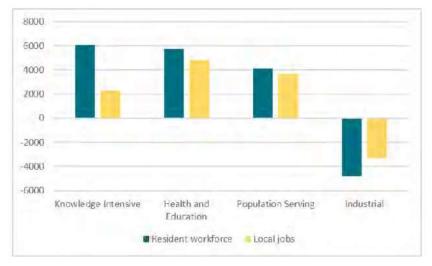
Furthermore, it shows a comparatively similar increase in the number of resident workers in Health and Education (5,742) to local jobs (4,836). A similar story can be said for Population Serving (4,103 compared to 3,683 local jobs).





The number of resident Industrial workers has decreased significantly more than the number of Industrial jobs in the Northern Beaches.

FIGURE 24: NORTHERN BEACHES COMPARATIVE GROWTH TOTAL EMPLOYMENT CHANGE 2006-16



Source: ABS, 2006, 2011, 2016

Figure 25 analyses the proportional change of employment across the four Broad Industry Classifications in the Northern Beaches LGA between the resident workforce and local jobs over the 10 years between 2006-16.

It shows that Knowledge Intensive workers have increased as a greater proportion of the Northern Beaches' resident workers than the proportion of local Knowledge Intensive jobs (+1.86% compared to +0.74%).

Health and Education and Population Serving show opposite trends. The proportion of Health and Education resident workers (+3.11%) has not kept up with the proportional increase of local jobs (+4.30%). The same can be said for Population Serving (+0.57% compared to +1.17%).

The proportion of local Industrial jobs has decreased at a faster rate than the proportion of Industrial resident workers (-6.2% compared to -5.53%).





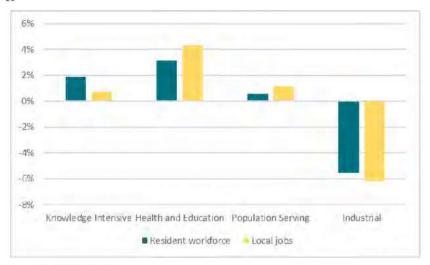


FIGURE 25: NORTHERN BEACHES COMPARATIVE PROPORTIONAL CHANGE OF EMPLOYMENT DIVERSITY 2006-16

Source: ABS, 2006, 2011, 2016

What does this mean?

The self-containment of the Knowledge Intensive industry may have declined over the 10 years between 2006-16 given that the number of Knowledge Intensive workers living in the Northern Beaches has increased significantly higher than the number of local Knowledge Intensive jobs. This likely to be due to Knowledge Intensive workers moving to the Northern Beaches but choosing to commute to the Sydney CBD and North Sydney for work. Proportionately speaking, the share of Knowledge Intensive jobs in the LGA has increased at a slower rate than the share of Knowledge Intensive resident workers.

Industry Specialisation (Location Quotient)

Location Quotient analysis is a measure of relative industry specialisation of a local economy compared with a larger area. In this case, the Northern Beaches industry profile is measured against Greater Sydney to ascertain whether there are certain industries that are relatively more specialised.

Of most importance are the two right hand quadrants. The location quotient score directly compares the proportional size of the industry in the Northern Beaches to Greater Sydney. For example, an LQ 2.0 means that the Northern Beaches is twice as specialised as Greater Sydney, or an LQ of 0.5 meaning that it is half as specialised.

The top right quadrant shows industries that are both specialised and growing while the bottom right shows specialised industries that are contracting. This is shown below in Figure 26 (some outlying industries may have been excluded).

For the Northern Beaches LGA, analysis shows:

- There are a number of industries in the Northern Beaches that are relatively specialised and growing, reflecting diversity in economic performance.
- While no industry in the Northern Beaches has significant specialisation, the most specialised industries are Retail Trade, Accommodation and Food Services and Construction.
- While Professional, Scientific and Technical Services has grown by two per cent since 2011 and is one of the largest Industries in the LGA, it is not as specialised when compared to Greater Sydney. Professional, Scientific and Technical Services can include employment in Finance, Insurance and Legal Services. As data above has indicated, a





large number of resident workers leave the LGA to work in Knowledge Intensive jobs elsewhere in Greater Sydney. This highlights a difference between the skills of local residents and the industry specialisation of the LGA.

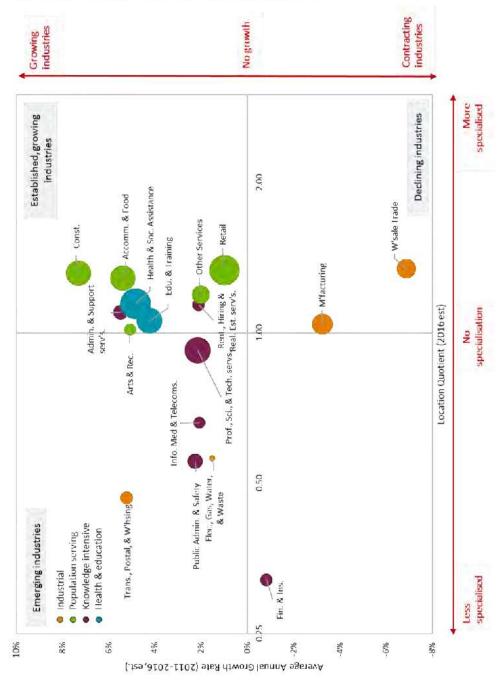
- Contraction in non-specialised industries is typically associated with industrial precincts such as wholesale trade and manufacturing.
- While other Knowledge Intensive industries are emerging (Information, Media and Telecommunications and Public. Admin and Safety), they are not as specialised as other industries in the top right quadrant.
- Health Care and Social Assistance and Education and Training are two of the larger industries in the top right quadrant of Established and Growing industries, despite not being the most specialised.

The next stage of the study includes precinct level profiles and analysis.









Source: ABS, 2011,2016





Employment Multiplier

The Input-Output (I-O) Model is a tool which quantifies the linkages of all sectors in a given economy. A region-specific model for the Northern Beaches LGA was generated to assess economic impacts in the Northern Beaches LGA and current activities on-site.

I-O models measure the relationships and inter-dependence between industries in the economy. The model identifies the buyer and supplier linkages in the local economy, highlighting those industries that have the greatest economic 'multipliers'. Multipliers are measures of the total impact on all industries in an economy arising from changes in the output of a particular industry. For example, an increase in output of the construction industry (i.e. more houses) would have a flow-on effect to industries related to construction. The I-O model framework enables identification of those industries that have the biggest 'bang for the buck' – in terms of value add and employment per additional unit of output.

Table 10 shows the I-O employment multiplier for industries within the Northern Beaches LGA at the 1-digit ANZSIC level, with the industries that have the largest effects to the overall economy of the Northern Beaches. These effects are highlighted in the conditionally formatted colour scale (green being the highest, red being the lowest) for each multiplier. The multiplier can be interpreted as: employment multipliers – at present each \$1 million increase in output in Public Administration and Safety, 12 jobs will be generated.

Table 10 also shows output and value added multipliers which can be interpreted as follows:

- Output Multiplier- for every additional dollar earned in Construction, the level of regional output increases by \$1.82
- Value Added Multipliers- for every extra dollar of output generated in the Education and Training industry, total regional income and gross operating surplus will increase by \$1.14





TABLE 10: NORTHERN BEACHES EMPLOYMENT MULTIPLIERS (2016)

Industry of Employment	Output Multiplier	Employment Multiplier	Value Added Multipliers
Agriculture, Forestry and Fishing	1.58	4	0.71
Mining	1.41	2	0.85
Manufacturing	1.43	3	0.61
Electricity, Gas, Water and Waste Services	1.46	2	0.92
Construction	1.82	4	0.73
Wholesale Trade	1.61	4	0.92
Retail Trade	1.63	10	1.07
Accommodation and Food Services	1.57	10	0.93
Transport, Postal and Warehousing	1.54	5	0.87
Information Media and Telecommunications	1.50	3	0.86
Financial and Insurance Services	1.55	3	1.06
Rental, Hiring and Real Estate Services	1.40	2	0.95
Professional, Scientific and Technical Services	1.73	6	1.01
Administrative and Support Services	1.75	6	1.04
Public Administration and Safety	1.73	12	1.10
Education and Training	1.60	5	1.14
Health Care and Social Assistance	1.57	9	1.12
Arts and Recreation Services	1.51	7	0.76
Other Services	1.47	8	0.77

Source: SGS Economics and Planning 2019

The most efficient generators of employment are the Public Admin. and Safety, Retail Trade, Accomm. and Food Services, and Health Care and Social Assistance classifications. Comparatively, Rental, Hiring and Real Estate Services, Mining and Electricity, Gas, Water and Waste Services classifications are diminutive in their effects.

Skills Leakage

This section examines the origin and destinations pairs to illustrate the outward and inward migration of workers in relation to the Northern Beaches LGA.

Key points of interest for the Northern Beaches LGA are:

- A self-containment rate of approximately 54 per cent, meaning over half of the resident workforce also work locally. The Demographic Study identified self-containment generally increased moving further north in the LGA (Manly 41 per cent; Frenchs Forest 43 per cent; Brookvale-Dee Why 55 per cent; Mona Vale 61 per cent).
- Leakage of Knowledge Intensive workers from the Northern Beaches to Sydney mostly in but not limited to Banking, Finance and Investment, Legal and Insurance Services (5,231 workers in total). This may be due to the lack of major commercial centres in the LGA, an ageing population, and lack of tertiary education employment opportunities.





- Significant leakage of Higher Education workers travelling to Sydney (526 compared to 109 working locally).
- Leakage of Managers to Sydney most prevalent amongst ICT Managers (790 compared to 290 local workers) and Finance Managers (612 compared to 356 local workers).
- Leakage of Professionals to Sydney, most prevalent amongst Solicitors (644 compared to 246 local workers), HR Professionals (528 compared to 285) and Financial Dealers (397 compared to 76 local workers).
- A self-sufficiency rate of approximately 77 per cent, meaning over three quarters of the local jobs available are filled by working residents of the Northern Beaches.
- Inward movement of workers to Northern Beaches LGA from other LGA, while miniscule, is mostly coming from surrounding LGAs including Ku-ring-gai, Hornsby and North Sydney.
- Notable subsets of the Knowledge Intensive and Health and Education Industries coming into the Northern Beaches include Computer System Design and Related Services (166 spread across the three aforementioned LGAs), Other Social Assistance Services (204), Aged Care Residential Services (161), and Primary Education (156).
- Some notable subsets of the Occupations coming into the Northern Beaches include Accountants (155), Primary School Teachers (148), Secondary School Teachers (148), Retail Managers (147) and Advertising, Public Relations and Sales Managers (127).

Outward migration of workers

Table 11 details the outward migration of Northern Beaches working residents by industry type. The Northern Beaches **self-containment rate is 54 per cent**, meaning over half of the resident workforce work locally in the LGA.

Data indicates there is a slightly larger number of Northern Beaches Knowledge Intensive workers commuting to Sydney than working locally in the LGA, and strong numbers in surrounding employment centres at North Sydney and Willoughby. Computer System Design and Related Services (1,200-1,400) and Accounting Services (900-1,000) are fairly spread across Sydney and the Northern Beaches. However, there is a significant skill leakage of Banking (2,207 travelling to Sydney compared to 332 working locally), Other Auxiliary Finance and Investment Services (1,240 compared to 560), Legal Services (1,045 compared to 519) and General Insurance (739 compared to 154)³.

Sydney is also a popular employment destination for Health and Education work outside of the Northern Beaches, however, self-containment of the LGA's Health and Education resident workforce is significantly high. Primary Education, Aged Care Residential Services, Hospitals, Other Social Assistance, Secondary Education and Child Care Services workers contain the highest totals and are fairly self-contained, while there is a skill leakage towards Sydney of Northern Beaches residents working in the Higher Education sector (526 compared to 109 working locally)⁴.

Population Serving industries are also significantly self-contained, however, there are also strong numbers travelling to Sydney, North Sydney and Willoughby. Interestingly, there are approximately 3,000 people that work in the Population Serving sector with No Fixed Address living in the Northern Beaches, mostly in the Construction Industry⁴. Industrial workers are also fairly self-contained, with strong numbers travelling to Sydney, Ryde and Botany Bay.

⁴ As a result of further cross-tabulation of ABS Census 2016 data



³ As a result of further cross-tabulation of ABS Census 2016 data



Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Northern Beaches (A)	15,675	15,075	24,710	8,413
Sydney (C)	16,659	2,013	3,251	1,344
North Sydney (A)	3,691	1,029	1,139	568
Willoughby (C)	1,859	1,643	1,498	652
No Fixed Address (NSW)	1,307	670	2,988	509
Ryde (C)	1,197	618	513	1,177
Ku-ring-gai (A)	364	1,103	477	117
Mosman (A)	382	469	779	50
Parramatta (C)	529	256	322	394
Botany Bay (C)	120	18	167	758

TABLE 11: PLACE OF WORK FOR NORTHERN BEACHES' WORKING RESIDENTS BASED ON INDUSTRY TYPE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Table 12 details the outward migration of Northern Beaches working residents by Occupation type. It shows there is a significantly high proportion of Northern Beaches working residents employed as Managers working locally or in Sydney (9,500 and 6,500 people respectively). Advertising, Public Relations and Sales Managers have strong numbers across both LGAs, Retail, Construction and Café and Restaurant Managers are more self-contained, and a greater share of Northern Beaches ICT Managers (790 compared to 290 working locally) and Finance Managers (612 compared to 356 working locally) are travelling to Sydney for work⁵.

The majority of Northern Beaches' Professionals are working locally or travelling to Sydney. Accounting (800-900) and Advertising and Marketing Professionals (730-760) are the largest Professional subsets fairly spread across both LGAs. Early Childhood, Primary and Secondary School Teachers, Registered Nurses and Private Tutors are significantly self-contained (combined total of 4,249 workers), while Northern Beaches' Solicitors (644 compared to 246 working locally), Human Resource Professionals (528 compared to 285), and Financial Dealers (397 compared to 76) are largely travelling to Sydney for work⁶.

⁶ As a result of further cross-tabulation of ABS Census 2016 data



⁵ As a result of further cross-tabulation of ABS Census 2016 data



Geography	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Northern Beaches (A)	9,464	15,537	8,343	8,313	9,819	7,785	2,693	4,529
Sydney (C)	6,448	10,170	1,025	878	3,475	1,397	87	222
North Sydney (A)	1,790	2,483	381	384	947	477	43	90
Willoughby (C)	1,078	2,049	517	457	924	558	95	144
No Fixed Address (NSW)	432	731	2,253	561	186	240	253	1,021
Ryde (C)	1,161	1,407	244	95	440	201	27	27
Ku-ring-gai (A)	334	808	208	294	266	128	9	59
Mosman (A)	255	397	262	300	213	200	17	73
Parramatta (C)	445	505	144	92	212	85	34	34
Botany Bay (C)	224	266	123	223	81	66	64	25

TABLE 12: PLACE OF WORK FOR NORTHERN BEACHES' WORKING RESIDENTS BASED ON OCCUPATION TYPE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Inward migration of workers

Table 13 details the inward migration of workers commuting to the Northern Beaches LGA from elsewhere, in addition to Northern Beaches working residents that commute locally within the LGA, by industry type.

As can be seen, the majority of jobs across all four BICs are significantly self-contained, culminating in a **self-sufficiency rate of approximately 77 per cent.** Outside workers are travelling from surrounding LGAs including Ku-ring-gai, Hornsby and North Sydney.

Further examination of the Knowledge Intensive Industry reveals that the Northern Beaches is significantly self-contained across all subsets, with some of the largest totals being Computer System Design and Related Services (1,460), Real Estate Services (1,241), Accounting Services (1,078), and Local Government Administration (974). Of the outside workers that are travelling to the Northern Beaches for employment, the majority are also working in Computer System Design and Related Services (166 spread Ku-ring-gai, Hornsby and North Sydney LGAs)⁷.

Further examination of the Health and Education Industry reveals that the Northern Beaches is significantly self-contained across all subsets, with most of the outside workers travelling to the LGA to work in Other Social Assistance Services (204), Aged Care Residential Services (161), and Primary Education (156)⁸.

The Population Serving sector in the Northern Beaches is also significantly self-contained, with the majority of local workers employed in Cafes and Restaurants (2,476), Supermarket and Grocery Stores (1,743), Takeaway Food Services (1,259), Clothing Retailing (948) and Club Hospitality (880)⁹.

⁹ As a result of further cross-tabulation of ABS Census 2016 data



⁷ As a result of further cross-tabulation of ABS Census 2016 data

⁸ As a result of further cross-tabulation of ABS Census 2016 data



Geography	Knowledge Intensive	Health and Education	Population Serving	Industrial
Northern Beaches (A)	15,675	15,075	24,710	8,413
Ku-ring-gai (A)	454	709	707	496
Hornsby (A)	340	390	580	450
North Sydney (A)	237	386	441	244
Central Coast (C) (NSW)	248	171	493	282
Willoughby (C)	217	340	382	238
Ryde (C)	185	214	354	238
Sydney (C)	178	228	423	160
Parramatta (C)	191	180	312	226
Inner West (A)	165	177	283	152

TABLE 13: INWARD MIGRATION OF WORKERS BASED ON INDUSTRY TYPE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Table 14 details the inward migration of workers commuting to the Northern Beaches LGA from elsewhere, in addition to Northern Beaches' working residents that commute within the LGA, by Occupation type. It still shows a significant level of self-sufficiency in the LGA.

Outside of the Northern Beaches LGA, the majority of Professionals commuting to the Northern Beaches are coming from Ku-ring-gai, Hornsby and North Sydney. While the Occupation is largely self-contained, there are a number of Accountants (155), Primary School Teachers (137) and Secondary School Teachers (148) travelling from the three aforementioned LGAs¹⁰.

Similarly, for Managers, while the Occupation is largely self-contained, workers from Ku-ringgai, Hornsby and North Sydney are largely coming to work as Retail Managers (147), and Advertising, Public Relations and Sales Managers (127)¹¹.

¹¹ As a result of further cross-tabulation of ABS Census 2016 data



¹⁰ As a result of further cross-tabulation of ABS Census 2016 data



Geography	Managers	Professionals	Technicians and Trades Workers	Community and Personal Service Workers	Clerical and Administrative Workers	Sales Workers	Machinery Operators and Drivers	Labourers
Northern Beaches (A)	9,464	15,537	8,343	8,313	9,819	7,785	2,693	4,529
Ku-ring-gai (A)	462	835	215	233	275	225	80	111
Hornsby (A)	323	487	283	174	190	127	101	136
North Sydney (A)	274	445	151	115	132	126	44	58
Central Coast (C) (NSW)	187	163	356	114	121	80	116	104
Willoughby (C)	199	379	170	102	134	114	47	67
Ryde (C)	172	310	157	90	115	87	53	66
Sydney (C)	159	324	154	148	76	78	16	84
Parramatta (C)	127	253	161	74	99	76	53	86
Inner West (A)	123	233	145	69	61	72	29	68

TABLE 14: PLACE OF USUAL RESIDENCE OF WORKERS BASED ON OCCUPATION TYPE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

Market Trends - Floorspace Vacancies

SGS undertook a broad desktop review of relevant market indicators covering retail, commercial and industrial markets within and surrounding the Northern Beaches LGA. The employment market vacancies results were largely taken from Real Commercial¹².

A limitation of the broad desktop review was the inability to obtain real price data on every property for lease without directly contacting the real estate agencies. Of 420 properties that SGS gathered data on regarding Northern Beaches vacancies in April 2019, 287 had lease prices readily available.

The analysis found a concentration of vacancies in centres across the LGA, namely Frenchs Forest, Belrose-Terrey Hills, Manly, Brookvale, Dee Why, Cromer-Collaroy, Narrabeen, Mona Vale and Newport.

The key findings were:

- Manly appears to have the highest average price per sqm (\$797) for retail and commercial vacancies, while Frenchs Forest has the lowest.
- Industrial properties cost less per sqm when compared to retail and commercial properties, with Brookvale containing the highest average price (\$294 per sqm), and Cromer-Collaroy having the lowest (\$207 per sqm).

¹² RealCommercial.com.au





TABLE 15: COMMERCIAL AND RETAIL VACANCIES (APRIL 2019) *

Centre	Average Price (\$ per sqm)	Median Price (\$ per sqm)	Minimum Price (\$ per sqm)	Maximum Price (\$ per sqm)
Frenchs Forest	\$338	\$363	\$92	\$681
Belrose-Terrey Hills	\$391	\$310	\$208	\$770
Manly	\$797	\$673	\$358	\$2,273
Brookvale	\$459	\$352	\$85	\$851
Dee Why	\$441	\$357	\$107	\$1,210
Cromer-Collaroy	\$679	\$588	\$292	\$1,144
Narrabeen	\$573	\$440	\$228	\$1,746
Mona Vale	\$469	\$380	\$219	\$910
Newport	\$641	\$585	\$268	\$1,180

SGS Economics and Planning 2019 using Real Commercial

*Commercial and Retail Vacancies have been combined as many are listed as both

TABLE 16: INDUSTRIAL VACANCIES (APRIL 2019)

Centre	Average Price (\$ per sqm)	Median Price (\$ per sqm)	Minimum Price (\$ per sqm)	Maximum Price (\$ per sqm)
Frenchs Forest	\$270	\$362	\$53	\$364
Belrose-Terrey Hills	\$233	\$234	\$192	\$275
Manly	\$282	\$282	\$244	\$321
Brookvale	\$294	\$351	\$116	\$660
Cromer-Collaroy	\$207	\$203	\$153	\$252
Narrabeen	\$224	\$218	\$156	\$280
Mona Vale	\$258	\$271	\$185	\$356

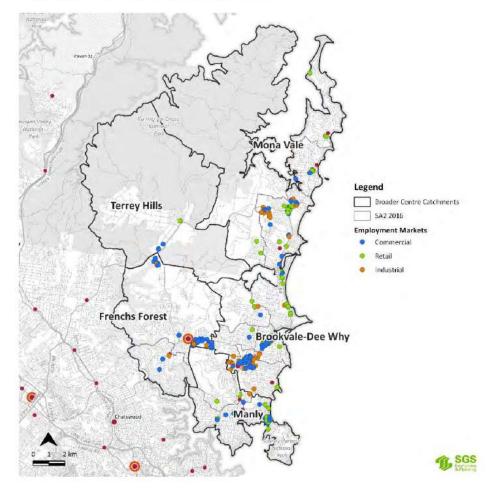
SGS Economics and Planning 2019 using Real Commercial

Figure 27 depicts the distribution of retail, commercial and industrial vacancies within the Northern Beaches LGA.





FIGURE 27: EMPLOYMENT MARKET VACANCIES (APRIL 2019)



SOURCE: SGS ECONOMICS AND PLANNING 2019 USING REAL COMMERCIAL

Historical Sales

SGS also undertook an analysis of historical commercial and business sales in the Northern Beaches using RP Data¹³. Where appropriate and possible, SGS also cross-checked RP's data with other commercial data sources to minimise the inaccuracies recorded online. This was particularly useful when trying to determine the floor area of each property that had been sold.

The analysis shows a more consistent and stable trend across the centres for sales in comparison employment market vacancies shown previous, which showed a larger disparity of prices across centres.

The key findings were:

- The average price for a commercial/business property ranged from \$5,000 \$7,000 per sqm (November 2018 to May 2019).
- Manly had the highest average price of \$12,181 per sqm.
- Belrose-Terrey Hills was the least expensive with an average price of \$4,254 per sqm.

¹³ https://www.corelogic.com.au/





Centre	Average Price (\$ per sqm)	Median Price (\$ per sqm)	Minimum Price (\$ per sqm)	Maximum Price (per sqm)
Frenchs Forest	\$5,571	\$3,000	\$2,933	\$13,350
Belrose-Terrey Hills	\$4,254	\$4,354	\$3,750	\$4,557
Manly*	5 7 1	-	5	54 7 11
Brookvale	\$5,186	\$5,011	\$1,407	\$8,861
Dee Why	\$5,051	\$4,398	\$2,500	\$10,438
Cromer-Collaroy	\$6,771	\$6,684	\$6,564	\$7,067
Narrabeen	\$6,764	\$7,798	\$1,977	\$10,516
Mona Vale	\$6,060	\$5,955	\$5,580	\$6,646
Newport	\$10,875	\$10,540	\$6,471	\$17,917

TABLE 17: NORTHERN BEACHES HISTORICAL COMMERCIAL SALES (NOVEMBER 2018 - MAY 2019)

SGS Economics and Planning 2019 using RP Data

*Only one commercial property listed as sold in the last six months- for \$12,181 per sqm.

Method of Travel to Work (POW)

The method of travel to work (Place of Work) indicator reports how those who work in the LGA travel to work.

For Northern Beaches LGA:

- Most workers originate in the LGA, at about 82 per cent, see Table 18.
- Majority of workers use vehicles to access work which is higher than Greater Sydney and the North District, Figure 28.
- Between 2006 and 2016, there was a slight increase in the proportion of people using public transport to access work and concurrently a drop in those using vehicles. However, both these figures were far less than the proportion seen in Greater Sydney and the North District, see Figure 29.

TABLE 18: ORIGIN OF WORKERS EMPLOYED ON THE NORTHERN BEACHES (2016)

Geography (POW)	2016	%
Northern Beaches	67,575	81.60%
Ku-ring-gai	2,478	2.99%
Hornsby	1,853	2.24%
North Sydney	1,358	1.64%
Central Coast	1,272	1.54%
Willoughby	1,234	1.49%
Sydney	1,058	1.28%
Ryde	1,057	1.28%
Parramatta	960	1.16%
Inner West	815	0.98%

Source: ABS Census 2016 (Tablebuilder Pro)





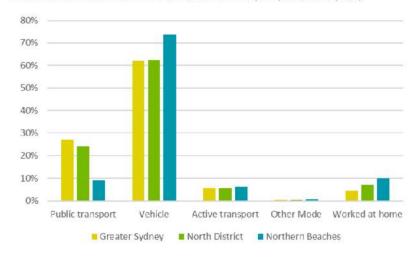


FIGURE 28: COMPARATIVE METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2016)

Source: ABS Census 2016 (TableBuilder Pro)

FIGURE 29: COMPARATIVE PROPORTIONAL CHANGE IN METHOD OF TRAVEL TO WORK (POW) STRUCTURE (2006-2016)



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)



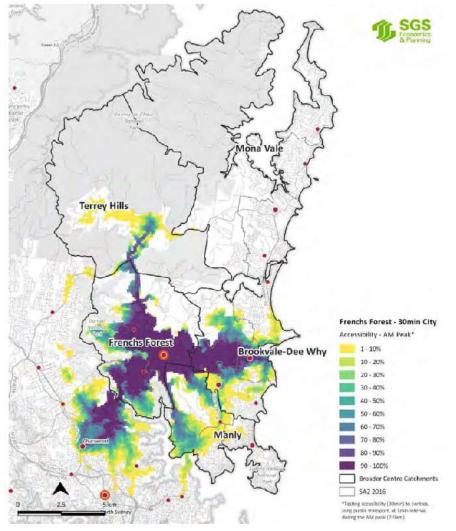


Employment Centre Accessibility

In keeping with the Greater Sydney Commission's focus on the 30-minute city, the following series of maps indicate accessibility within 30-minutes to a centre in the Northern Beaches LGA via public transport during the AM peak (7am-9am).

Frenchs Forest has broad 30-minute coverage but low densities. Thirty-minute accessibility to the Frenchs Forest centre is generally focussed east-west within the LGA with strong access between Frenchs Forest and Brookvale-Dee Why. Frenchs Forest centre is also accessible in 30-minutes north to Terrey Hills. There is also good access between Frenchs Forest and Chatswood, see Figure 30. A challenge for Frenchs Forest centre maybe the lack of workers in direct vicinity of the centre given the low densities. This may change with the town centre and Hospital development.

FIGURE 30: 30MIN ACCESSIBILITY TO FRENCHS FOREST DURING AM PEAK-MAP (2019)



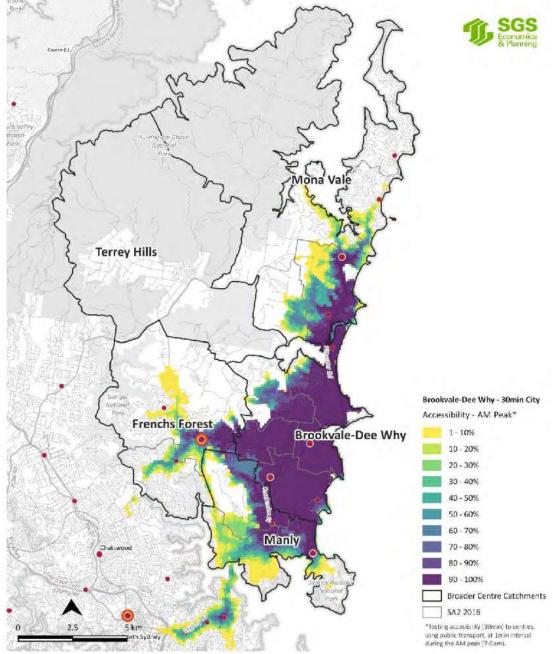
Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019





Thirty-minute accessibility in the AM peak to Brookvale-Dee Why is widespread across the LGA. The strongest level of access (90-100 per cent) reaches other town centres as far north as Warriewood and south to Manly and west to Frenchs Forest, see Figure 31.

FIGURE 31: 30MIN ACCESSIBILITY TO BROOKVALE-DEE WHY DURING AM PEAK- MAP (2019)



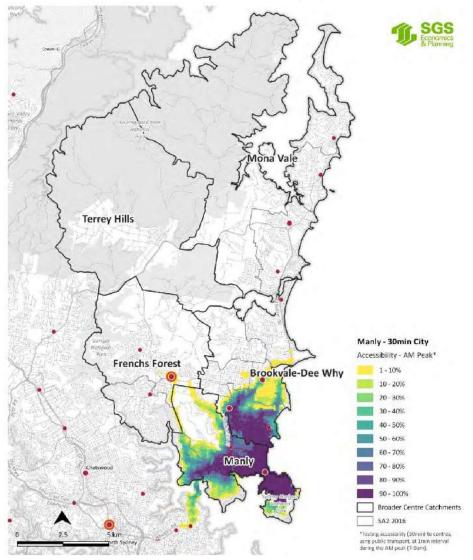
Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019





Accessibility to Manly town centre in 30-minutes is much more contained in the AM peak. The strongest level is access is centred around suburbs to Manly town centre such as Manly Vale, Queenscliff and Balgowah and would be indicative of lower public transport offerings around this centre, see Figure 32.

FIGURE 32: 30MIN ACCESSIBILITY TO MANLY DURING AM PEAK- MAP (2019)



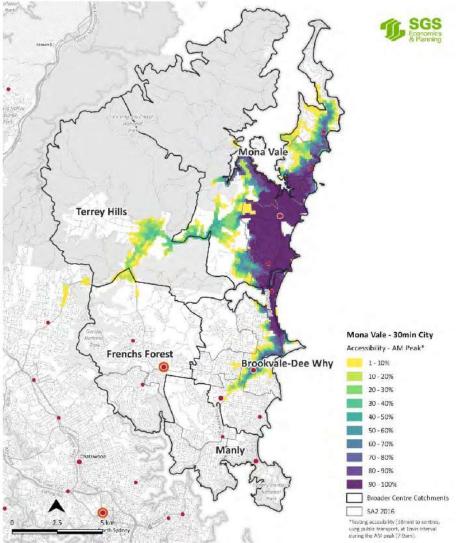
Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019





Accessibility to/from Mona Vale by public transport in the AM peak is contained to the northern portion of the LGA, see Figure 33. As noted in the Demographic study, Mona Vale has low densities, high private vehicle use for the journey to work and the largest number of workers with alternate working arrangements (eg: Working from Home), therefore tailored solutions to this mode of employment would need to be investigated and accessibility to the rest of the LGA would need to be supported.

FIGURE 33: 30MIN ACCESSIBILITY TO MOVA VALE DURING AM PEAK- MAP (2019)



Source: SGS Economics and Planning 2019 and Open Data NSW - General Transit Feed Specification (GTFS) 2019





3.3 Tourism

For the year ending March 2018, Destination NSW estimates the total number of international visitors to Manly (those who stayed overnight and those who visited on a day trip) was 1.1 million. This was a quarter of all international visitors to NSW. The total number of international visitors that stayed overnight was 62,600 persons. The top activities that they undertook in Manly were eating in restaurants and cafes (96 per cent), visited the beach (90 per cent), sightseeing (87 per cent), shopping for pleasure (82 per cent), and visited national/state park (66 per cent).

On the domestic visitor front, there was 901,200 domestic overnight visitors in the year ending March 2018 (including those who stayed overnight elsewhere). This accounted for three per cent of all domestic visitors to NSW. They mainly travelled to Manly to visit family and friends and mostly came from regional NSW. The top activities they engaged in were eating out (88 per cent), visiting family and friends (55 per cent), going to the beach (51 per cent) and sightseeing (33 per cent).



FIGURE 34: TOTAL VISITORS NORTHERN BEACHES LGA

Source: Northern Beaches Destination Management Plan, 2019

For total visitors to the LGA, long term trends (2009-2018) suggest visitors have been variable overtime, see Figure 34, rising to a peak in 2016 of 3,372,000 visitors and falling slightly to 2,998,000 by 2018.

In 2017/18, it was estimated that Northern Beaches LGA on average had a higher proportion of international visitor nights and domestic day trippers than NSW as a whole, see Figure 35.

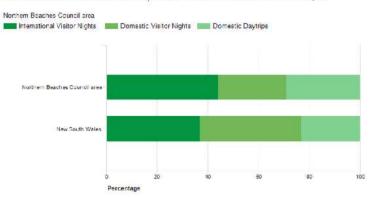


FIGURE 35: NORTHERN BEACHES LGA, BREAKDOWN OF VISITOR NIGHTS 2017/18

Source: Economy ID, https://economy.id.com.au/northern-beaches/tourism-visitor-summary, date accessed: 04/06/2019





Tourism and hospitality contributed to 9,500 direct and 4,380 indirect employment jobs in the LGA. Most employees were aged between 25 to 44 years (39 per cent) and 15 to 24 years (36 per cent)¹⁴.

Five-year data analysis (2013/14 - 2017/18) suggests domestic overnight visitors tended to stay in the LGA between two to four days. Visiting friends and family was the major reason for visitation at 54.3 per cent. For international visitors, the average length of stay was between 15 to 21 day for reasons of holiday. Some visitors stayed up to 95 days for reasons of education and employment, see Figure 36.

FIGURE 36: VISITOR DATA FOR NORTHERN BEACHES

Main Reason for Trip		DOMESTIC OVERNIGHT			INTERNATIONAL			
S year total: 2013/14 - 2017/18	Visitors	Visitor Nights	% Visitors ¹	Av. Length of Stay (days) ¹	Visitors	Visitor Nights	% Visitors ¹	Av. Length of Stay (days) ¹
Visiting friends and relatives	1,317,444	4,139,579	54.3%	3,1	174,905	2,753,160	35.8%	15.7
Holiday	636,445	1,856,091	26.2%	29	175,560	3,678,900	36.0%	21.0
Business	344,200	978,417	14.2%	2.8	27,222	298,350	5.6%	11.0
Education					27,969	2,466,336	5.7%	88.2
Employment					13,666	1,280,909	2.8%	\$3,7
Other reason	132,695	566,839	5.5%	4.3	68,652	1,542,227	14.1%	77.5
TOTAL	2,426,159	7,540,927	100%	8.1	487,977	12,019,884	100%	24.6

Note 1: Green = higher than for NSW; Orange = equal to or near all of NSW; Red = Lower than for NSW

Source: Northern Beaches Destination Management Plan, 2019

¹⁴ Northern Beaches Destination Management Plan, 2019, p. 23.





3.4 Key Findings

Low population growth rates and an ageing population

Northern Beaches LGA will have lower growth rates than the Greater Sydney region and the North District, as well as an increasingly ageing population which is generally consistent with Greater Sydney. There may be a rise in the 20 to 30-year old 'young adult' age bracket as the youth group transitions. Overseas migrants are locating in Northern Beaches LGA and tend to be of working age. They would replenish the workforce. Economic centres, businesses, planning and policy will have to respond to the trend of an ageing population and attempt to maintain diversity in the community by catering to the needs of all age groups.

A part-time and highly self-contained workforce

Northern Beaches LGA has a higher proportion of people working part-time than Greater Sydney and the North District and this has been growing since 2006. Just over half of the local resident population work locally, and over three quarters of the local jobs are filled by local working residents. Self-containment generally increases moving north in the LGA.

A higher share of local residents work in knowledge intensive jobs and population serving jobs, although there has been a rise in the number of people working in health and education. Residents working in industrial industries has decreased over time. The lack of affordable housing may be linked to the decrease of residents working in industrial industries and the high number of workers coming to the LGA working in healthcare related jobs.

Knowledge Intensive and Population Serving jobs are well represented in the LGA, Health and Education jobs have experienced the most growth

Most local residents are employed in knowledge intensive related jobs (about 32 per cent) and population serving related jobs (about 31 per cent). Between 2006 and 2016, the proportion of knowledge intensive and health and education jobs held by local residents increased in the LGA, whereas population serving jobs only experienced a small increase and industrial jobs undertaken by residents decreased by about -6 per cent.

Residents in the Manly catchment have a higher share of knowledge related jobs and less population serving jobs when compared to the rest of the LGA; residents working in health and education jobs are generally equally distributed across the LGA.

Professional and managers are the most common occupations for local residents

Professionals and managers living in the LGA tend to be located in the suburbs of Manly-Fairlight, Balgowlah-Clontarf-Seaforth; whereas industrial workers in the LGA tend to be located around Beacon Hill-Narraweena and Dee Why-North Curl. Suburbs with major retail outlets had a greater presence of sales workers.

Growth rates indicate all occupations held by local residents in the LGA have remained stagnant or declined between 2006 and 2016, except professionals and managers, and community and personal services which have significantly risen. The growth in community and personal services occupations is likely to be linked to growth in health and education jobs overall and an ageing population.

Employment has grown in Manly

An additional 5,993 jobs have been generated in the LGA between 2011 and 2016 with the majority of these located in the Manly catchment with +2,489 jobs and a growth rate of 20 per cent. Brookvale-Dee Why catchment also exhibited a strong rise in jobs at +2,472 jobs and a growth rate of 10 per cent.





Increased proportion of professional services and community and personal services jobs available in the LGA

In relation to the types of jobs people work within in the LGA, data indicates there has been an increase in the proportion of professional services and community and personal services jobs. There has been a decline in clerical and administrative workers and sales workers. There are slightly more professional jobs located in Manly and Frenchs Forest; slightly more sales related jobs in Mona Vale, Brookvale-Dee Why and Manly; and slightly more technician and trade jobs in the Terrey Hills catchment.

Resident workforce compared to local job offerings is more balanced for health and education and population serving industries than knowledge intensive industries

The number of knowledge intensive workers living the LGA (6,035) has increased more than the number of knowledge intensive jobs that exist in the LGA (2,292). Whereas, the number of resident workers to local jobs for health and education (5,742 resident workers to 4,836 local jobs) and population serving (4,103 resident workers to 3,683 local jobs) industries is more balanced.

High rates of private vehicle use to access employment

Private vehicle use for the journey to work is extremely high in the Northern Beaches LGA and above the level of vehicle use for Greater Sydney and the North District. Private vehicle use generally increases moving north of the LGA. High vehicle use could be attributed to the lack of public transport options, and distance, to employment centres outside of the LGA but also within the LGA, given the high rate of job self-containment. The proportion of people using public transport has grown in the LGA, albeit at a much lower level when compared to Greater Sydney and the North District. Around Manly there is greater public transport use compared to the rest of the LGA.

Employment Centre Accessibility

There are strong 30-minute linkages between Frenchs Forest and Brookvale-Dee Why, as well as to Chatswood. Generally, there is strong 30-minute access radiating out of Brookvale-Dee Why to surrounding areas in the LGA. Manly and Mona Vale centres have contained 30minute accessibility in the AM peak. Low densities around centres, in particular Frenchs Forest and Mona Vale impacts the availability of workers within the 30-minute radius.

Strong presence of population serving jobs and health and education jobs in the LGA

Northern Beaches LGA has a higher percentage of population serving jobs than when compared to Greater Sydney and the North District. Health and Education jobs have increased in the LGA in the decade 2006-2016. The LGA shows specialisation in both these industries when compared to Greater Sydney. While Knowledge Intensive industries are emerging (Information, Media and Telecommunications and Public. Admin and Safety), they are not as specialised as other industries in the LGA, most likely due to their preference to locate in larger commercial centres such as the CBD.

Social assistance, aged care, primary and secondary school teachers and workers are coming to Northern Beaches LGA to work

In relation to the aged care workers, this may increase as the population ages and Northern Beaches residents continue to be employed in other industries. This may be linked to the lack of affordable housing for key workers in the LGA.





Approximately 16,659 residents leave the Northern Beaches LGA to travel to Sydney CBD for jobs in Knowledge Intensive industries. This is slightly more than the number of residents who remain working in Knowledge Intensive industries within the LGA, at about 15,675. Approximately 3,691 and 1,307 residents travel to North Sydney and Willoughby respectively to work in Knowledge Intensive industries. This could be jobs related to Banking, Finance and Investment, Legal and Insurance Services. There are also a notable number of residents travelling to Sydney CBD for jobs in Health and Education, Population Serving and Industrial industries at 2,013, 3,261 and 1,344 persons respectively.

Potential tension with Manly centre

The Manly catchment has exhibited the highest growth rate in employment between 2011-2016. Place of work data indicates the Manly catchment has a high share of professional related jobs. Policy directives for the centre encourage a diverse mix of uses in tourism, retail and entertainment components of the centre, as well as diversifying commercial activity, while the closure of Manly hospital will see a likely decline in health-related jobs. Over time, tourism to Manly has been variable. A clear vision and balancing competing industry land use into the future will be required.

Market trends highlight the desirability of Manly and Brookvale

Manly appears to have the highest average price per sqm (\$797) for retail and commercial vacancies, while Frenchs Forest has the lowest. Industrial properties cost less per sqm when compared to retail and commercial properties, with Brookvale containing the highest average price (\$294 per sqm), and Cromer-Collaroy having the lowest (\$207 per sqm). This further reiterates the popularity of Manly as a centre, and the need to improve the desirability of Frenchs Forest as a centre for retail and commercial purposes; for Brookvale this highlights the desirability of the industrial zone and a need to manage the pressures and demand in this centre given the 'retain and manage' policy directives.



northern beaches

council



4. TRENDS AND DRIVERS

This chapter considers some trends and drivers that may impact future land use and economic activity centres in Northern Beaches LGA.

4.1 Retailing

Changing Profile of Supermarkets

High street retail strips and enclosed shopping centres are often anchored by a supermarket that acts as the major tenant with smaller stores clustered around it. Anchor stores play a key role in the overall health of a shopping centre or district. Traditionally, Australia's groceries market has been dominated by Woolworths and Coles brands. Even today, together, they account for about 70 per cent of the market¹⁵, see Figure 37. However, the past decade has seen the rise of two main competitors – IGA and Aldi.

Combined, IGA and Aldi account for approximately 21 per cent of market share. Aldi, the German discount supermarket chain, has tripled its market share (3.1 per cent to 11.6 per cent) in the ten years to 2015. The promotions focus on low-price items of 'home brands' has attracted a number of shoppers who may not have traditionally shopped at discount supermarkets. In NSW and Victoria, about 47 per cent of grocery buyers in each state now shop at Aldi in any given four-week period. Woolworths and Coles in contrast have seen their market share decrease¹⁶.

Where supermarkets tend to service their surrounding population catchment, anecdotally Aldi appears to challenge this trend, with people often deliberately shopping at Aldi in search of a bargain even though it is not their closest supermarket.

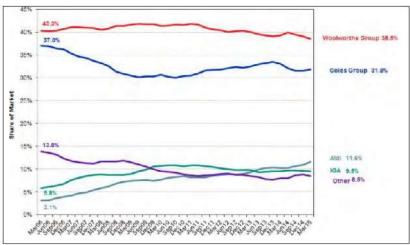


FIGURE 37: MARKET SHARE OF LEADING SUPERMARKETS, 2006-2015

Source: Roy Morgan Research, 2015

¹⁵ Roy Morgan Research 2015, 'The ALDI effect: Australia's changing supermarket scene' – 22 June 2015 <u>http://www.roymorgan.com/findings/6297-aldi-effect-australias-changing-supermarket-scene-201506220132</u> ¹⁶ Roy Morgan Research 2015, 'The ALDI effect: Australia's changing supermarket scene' – 22 June 2015 <u>http://www.roymorgan.com/findings/6297-aldi-effect-australias-changing-supermarket-scene-201506220132</u>





In addition to the shifts in market share of supermarket operators, there are also shifts in Australian consumer lifestyles and food retailing preferences. Supermarket operators, regardless of who they are, need to adapt to the changing market.

The demand for organic produce is a small but growing sub-sector of food retailing. It is estimated that the total value of the organic market in Australia is \$2.4 billion, an 8.8 per cent increase since 2012¹⁷. The growing awareness of how food is produced and the impact of chemicals on the environment has driven growth in organic produce. People are choosing vegetarian, vegan and gluten-free diets and are driving the specialised retail offer of organic, fresh and minimally processed foods. The Australian Organic Market Report 2018 states organic shoppers are widespread, buying at all ages, incomes and life stages. It is noted that households that have a total income of \$90,000 or higher make up 45.1 per cent of organic shoppers. Households earning between \$45-90k per year are 32.9 per cent and households earning less than \$45k per year at 22 per cent of organic shopper numbers¹⁸.

Supermarkets are noted as being the dominant purchasing pathway for organic grocery products, with Woolworth and Coles having the dominant share at over 65 per cent but they are under pressure. Aldi has grown its share of organic produce since 2018 alongside other non-supermarkets and independents like Costco increasing their share since 2016¹⁹.

Another new trend that may gain momentum is the development of smaller format supermarkets that are tailored to the local market and offer a larger range of convenient, ready-to-go foods. Key reasons for the development of smaller supermarket stores is the lack of available land in urbanised areas as the population increases in density, higher rents, the arrival of global players in the Australia markets forcing store closures and rising inventory costs and wages requiring downsizing. Supermarket operators, however, see the smaller format as an opportunity to offer tailored products of convenience rather than focusing on a wide selection of goods, at a range of prices. They see customer habits have changed where Australians want faster, takeaway foods of high quality which fits with the smaller supermarket format²⁰. For the supermarket giants, Coles and Woolworths, the new format is a way to compete with the independent retailers such as Harris Farm and IGA.

Convenience stores are struggling with the strong competition posed by the new supermarket formats. Operators are having to adjust product ranges and prices to provide value for money. Industry revenue is expected to fall -0.8 per cent annually from 2019 to 2024²¹.

It is worth noting that while supermarkets capture a significant proportion of food retailing, the role of non-supermarket specialty food stores, such as bakeries, grocers, and delicatessens, in meeting food retailing needs is not insignificant.

https://www.afr.com/business/retail/coles-unveils-first-coles-local-convenience-store-format-20181111-h17r25, date accessed: 10/04/2019; Grimmer, L & Mortimer, G, 2018, 'Honey I shrunk the store: why your local supermarket is getting smaller', https://theconversation.com/honey-i-shrunk-the-store-why-your-local-supermarket-is-getting-smaller-98246, date accessed: 10/04/2019; Hatch, P, 2018, 'Coles opens its own little shop as battle for customers goes small', https://www.smh.com.au/business/companies/coles-opens-its-own-little-shop-as-battle-for-customers-goes-small-20181113-p50foj.html, date accessed: 15/05/2019

²¹ IBISWorld, 2019, 'Convenience Stores in Australia', <u>www.ibisworld.com.au</u>, p. 3



¹⁷ Australian Organic, 2018, Australian Organic Market Report, <u>https://user-cprcmgz.cld.bz/Australian-Organic-Market-Report-2018</u>, date accessed: 09/04/2019, p. 27

¹⁸ Australian Organic, 2018, Australian Organic Market Report, <u>https://user-cprcmgz.cld.bz/Australian-Organic-Market-Report-2018</u>, date accessed: 09/04/2019, p. 47

¹⁹ Australian Organic, 2018, Australian Organic Market Report, <u>https://user-cprcmgz.cld.bz/Australian-Organic-Market-Report-2018</u>, date accessed: 09/04/2019, p. 48

²⁰ Mitchell, S, 2018, 'Coles unveils first Coles Local convenience store format', Financial Review,



Case Study: Coles Local, Surrey Hills, Melbourne

In 2018, in the quiet, leafy suburb of Surrey Hills, east Melbourne, Coles unveiled its first small format store under the 'Coles Local' branding, catering to time-poor customers doing more frequent, smaller grocery shops during the week and are willing to pay for premium products.

The store is built inside an old printing plant and is half the size of a traditional supermarket at 1,200 sqm. It carries one third of the usual range of products (8,000 products) which is twice the number of products of Woolworths Metro stores. This allows customers to do a full grocery shop.

More than half the floorspace is allocated to fresh food, including chilled ready-to-eat meals. Packaged groceries are heavily tailored to the local demographic and includes premium, locally produced items such as honey, meats and bakery items; has Asian, vegetarian and vegan options; and offers 100 per cent Australian fruits, vegetables and seafood. The store is also experimenting with an in-house barista, ground-to-order peanut butter and a 'Foodie Hub' housed by an in-house chef offering recipes and advice.

Coles is planning to assess the success of the Surrey Hills site, although it already has several sites earmarked for similar ventures. Woolworths started its small format Metro stores five years ago and now has 33 stores.



Source: Google Image, 2019





Rise of Regional Shopping Centres

Historically, retailing has been viewed as a city centre or town centre activity, particularly for higher order retailing. However, regional suburban centres have emerged as the preferred destination for many consumers and preferred location for retailers which has often come at the expense of traditional local retail centres.

In recent years, some regional suburban centres, such as Bondi Junction, Chatswood and the Macquarie Centre have attracted large international retailers ahead of store development in the city centre. The trend of retail decentralisation is driven by a number of factors including:

- Growth of an affluent and mobile population in suburban areas
- Development of strong corporate chains with fewer ties to a locality and more willingness and need to move shops to areas of demand and opportunity
- Changes in the methods of selling which have seen a demand for larger stores and associated parking.

It has been noted that the popularity of regional shopping centres is being challenged with the rise of online retailing, emerging international brands, pop-up stores, general weak retail sales growth and smaller neighbourhood centres offering a range of conveniences. Repurposing these centres is seen as a requirement to gain back market share that includes changes in the retail mix that may include medical centres, gyms and the inclusion of entertainment and events²².

Change in Retail Trading Hours

Retail trading hours have relaxed over the past twenty years where shops tend to open on both weekdays and weekends. They are also increasingly trading for longer during the day and into the evening. In part, retailers are reassessing their trading hours as operating hours are seen as outdated - failing to keep up with societal shifts, such as flexible working hours and single parent households that demand alternate shopping times, but also comes in response to the rise of online shopping and an attempt to gain a competitive angle²³.

Tenancies that have longer opening hours can also support retail services that operate 'after hours', such as cinemas and restaurants. This creates a symbiotic relationship and can help to promote and sustain the night-time economy in a precinct.

Fine Grain Spaces

'Fine grain' is a term used to describe small-scale spaces that provide a low-cost layer of diverse and specialised activities in a place²⁴. Fine grain spaces can encourage greater community interaction, cultural and creative expression and promote more walkability and sociability in activities and through the fabric of the built environment²⁵.

In terms of retail, fine grain involves shop fronts at a human scale, often in the form of a main street or high street. A fine grain high street shopping experience offers a more unique retail experience to shopping centres with small local businesses and boutiques. Examples are often seen in villages in the Blue Mountains (for example Leura or Blackheath) or in the Southern Highlands (for example Bowral), both key visitor destinations.

²⁴ City of Sydney, 2015, George Street 2020 – A public domain activation strategy, part 3,

https://www.cityofsydney.nsw.gov.au/_data/assets/pdf_file/0010/308827/George-Street-2020-A-Public-Domain-Activation-Strategy_Part3.pdf, date accessed: 09/04/2019



²² Commercial Property Guide, 2019, 'Sub-regional shopping centres set course for survival',

https://www.commercialpropertyguide.com.au/blog/investing/sub-regional-shopping-centres-set-course-for-survival-126, date accessed: 10/04/2019

²³ Inside Retail, 2014, 'Should retailers extend trading hours?', <u>https://www.insideretail.com.au/news/retailers-extend-trading-hours-201407</u>, date accessed: 09/04/2019



As shopfronts are often owned and rented individually along a high street, there is limited control on where certain shops and businesses set up. This contrasts with shopping centres, where centre mangers can direct the location of stores to create clusters, such as fashion floors and fresh food sections. The inability to control the clustering of businesses may limit the ability for collaboration, which in turn may impact on the shopping experience as a 'one-trip' experience. However, this lack of synergy may form part of the appeal of high street retailing with an eclectic mix of stores in proximity.

High street retailing has faced significant challenges in recent years. This is attributed to the rise of regional shopping centres, changes in consumer habits and online retailing. Fine grain retailing along high streets has, however, been adapting to combat these changes, changing from a convenience shopping role to a destination and an experience, as evident in the rise of cafés and cultural uses, such as art galleries and performance spaces that are not easily replicated in shopping centres and not available online.

Principles to successfully promote fine grain activities include having a variety of scales with small and large activities; proximity of shared activities; permeability and engagement with the street; and having spaces that are multifunctional and encourage shared use always of the day²⁶.





Case Study: Springwood, Blue Mountains

The suburb of Springwood in the Blue Mountains is an example of a suburb that contains fine grain retail development. The fine grain nature of the suburb has been incorporated into the fabric of the built form by a range of different elements which include:

- A balanced mix of open space and built form elements
- A mix of uses including art galleries, cafes, restaurants and public spaces
- Smaller lot sizes which encourage a human scale streetscape
- Residential uses are setback from the core retail area which encourages active street frontages and retains a commercial mix.

Promoting and facilitating this through policy and urban design will underpin finer grain retail. Finer grain streetscapes promote planning on a human scale. The detailed streetscape encourages permeability and interest and makes it an attractive place for people to shop, relax and recreate.



Emergence of Café Culture, Food Centres and Experience Dining

Fuelled by Australia's strong coffee culture, the café and coffee shop industry has experienced moderate growth in the last five years. In 2018-19, the industry was estimated to be worth \$9.8 billion where a growing number of speciality cafes and coffee shops have opened for business and have led to high industry competition, pushing down profitability²⁷. Industry revenue is forecast to increase at an annualised 1.9 per cent over five years through to 2023-24 at a worth of \$10.7 billion²⁸.

²⁸ IBISWorld, 2018, 'Cafes and coffee shops in Australia', www.ibisworld.com.au, p. 7



²⁷ IBISWorld, 2018, 'Cafes and coffee shops in Australia', <u>www.ibisworld.com.au</u>, p. 4



NAB notes food retailing has been one of the better performers in the retail sector, largely driven by a boom in breakfast and lunches at cafes and online ordering of take-way for dinner²⁹. Artisan bakeries and patisseries have increasingly sought to re-position themselves as cafés, encouraged by the strong growth in recent times. It is anticipated restaurants will expand café-style operations as they compete with cafés for customers³⁰.

Cafés and restaurants currently account for approximately 14 per cent of retail sales volumes across Australia at \$3.5 billion, up from \$2.5 billion in 2009³¹. Consumers are expected to spend more on eating out in the next five years from 2018. Trends and drivers supporting growth of this industry include busier lifestyles requiring fast and convenient food and dining options; increased expenditure on recreation and leisure activities; and an appreciation for coffee culture and the lifestyle associated with it³².

Outdoor dining in Sydney has remained popular, particularly given the conducive climate. This is witnessed in the presence of a number of local high street outdoor food retail options, including Church Street, Parramatta; Willoughby Road, Crows Nest; Crown Street, Surry Hills; and Haldon Street, Lakemba. The move towards outdoor dining and restaurant-defined retail strips requires a reconfiguration of footpaths and road alignment, a strong focus on urban amenity, including street trees, provision of furniture and pedestrian/diner safety, as well as supportive policies that enable these developments to take place.

For shopping centres and associated food courts, it has been noted they are now being refitted into high quality, contemporary dining precincts that refocus the food offering with some clustering cafes, restaurants and fresh food outlets. These can occur inside shopping centres but can also include outdoor components. Colliers states department stores are no longer the key drawcard for customers to shopping centres. The 'contemporary food courts' are new spaces to congregate rather than just transact and are increasingly used as the driver of footfall by shopping centre operators. Furthermore, with the rise in online retailing and home food delivery, retail landlords are also using this evolution of shopping Centre's Piazza Dining Precinct with outdoor sections, Westfield Chatswood's Hawker Lane and Westfield Hurstville with its new rooftop dining and entertainment precinct³³. Colliers notes three design principles often used in these such developments include:

- Outdoor/alfresco: rooftop, high street, open-air, indoor/outdoor combinations appear vital to producing a successful product and add to existing nightlife in close surrounds.
- Green: relevant to the outdoor dining environment, consumers are responsive to plants, trees and earthy tones, extending the duration of patronage.
- Access: night-time accessibility is fundamental, with clear pathways, street frontages and easy access to parking facilities³⁴.

The Property Council of Australia has noted that the rise of UberEATS and Deliveroo and the popularity of ordering food-on-demand at home, is encouraging restauranteurs to set up 'dark kitchens'. This is where restauranteurs set up multi-kitchen sites, often in a low-grade retail space or repurposed basements, to cope with the demands of home delivery³⁵.

https://www.propertycouncil.com.au/Web/Content/News/National/2017/Top_five_food_retailing_trends_in_2018.aspx, date accessed: 09/04/2019



²⁹ NAB, 2017, The Future of Retail: the trends reshaping retail and the future implications for the Australian marketplace', <u>https://business.nab.com.au/wp-content/uploads/2017/09/The-future-of-retail-September-2017.pdf</u>, date accessed: 09/04/2019

³⁰ IBISWorld, 2018, 'Cafes and coffee shops in Australia', <u>www.ibisworld.com.au</u>, p. 4

³¹ Colliers, 2016, Back to the Future: light rail to spur CBD retail growth, Research and Forecast Report: First Half 2016, p. 10
³² IBISWorld, 2018, 'Cafes and coffee shops in Australia', <u>www.ibisworld.com.au</u>, p. 5-7

³³ Colliers, 2016, Back to the Future: light rail to spur CBD retail growth, Research and Forecast Report: First Half 2016, p. 28 ³⁴ Colliers, 2016, Back to the Future: light rail to spur CBD retail growth, Research and Forecast Report: First Half 2016, p. 28-9

³⁵ Property Council of Australia, 2017, 'Top five food retailing trends in 2018,

northern beaches council

> In contrast, the Property Council also expects restaurants will have to start attracting diners back out of the comfort of their own homes. Eating out will become more of an experience, where the attraction is no longer just about the food but will also become a value-add opportunity for education, sustainability, growing, tasking, listening, learning, hands-on experiences, music and entertainment. As a result, they expect some tenancies will have larger and more expensive fitouts³⁶. Examples of 'experience dining' include the Grounds of Alexandria which offers a café, bakery, retailing and garden located in a converted pie factory. Koskela Kitchen in Rosebery is one part of the greater Koskela complex that offers designer retailing, education and workshop classes and an art gallery space in a repurposed industrial warehouse site.

Case Study: The Spot, Randwick

The Spot in Randwick LGA, and is home to several bars, restaurants and cafes. The Spot also houses the Ritz Cinema which is a historic art deco cinema.

The Spot has high amenity as the streetscape is:

- Walkable
- Accessible to the Randwick strategic centre by active transport and accessible to Sydney CBD
- Well maintained
- Fine grained
- Landscaping and trees create a comfortable urban environment
- Attractive and has a range of outdoor dining places
- Park benches also provide people a place to relax
- Traffic calming devices and pedestrian crossing facilitate high pedestrian amenity.



Source: Domain, 2019

The Spot is an example of how place can be transformed through urban design principles such as landscaping, traffic calming interventions, the provision of street furniture and encourage an outdoor dining culture.

Rise of Online Retailing

Online retail currently makes up a small proportion of retail turnover in Australia where online spending has been estimated at about 6.4 per cent of total retail turnover. Despite these low levels, growth has been strong. Since 2013, it is estimated online retail turnover has grown 142 per cent³⁷. NAB estimated that in the 12 months leading up to January 2019, Australians

³⁷ Department of Industry, Innovation and Science, 2017, Inquiry into impacts on local businesses in Australia from global internet-based competition: Department of Industry, Innovation and Science submission, industry.gov.au, p. 9



³⁶ Property Council of Australia, 2017, 'Top five food retailing trends in 2018,

https://www.propertycouncil.com.au/Web/Content/News/National/2017/Top_five_food_retailing_trends_in_2018.aspx, date accessed: 09/04/2019

spent approximately \$28.88 billion on online retail which was the equivalent of about nine per cent of retail in the traditional 'brick and mortar' retail sector³⁸.

Reasons individuals choose to shop online include the reduced amount of time it takes to undertake purchases; it is easier to find the cheapest price for a good; and online shopping provides the flexibility to shop at convenient times³⁹.

Department and variety stores recorded the highest online retail sales at approximately 29.6 per cent year to year sales average, followed by games and toys (20.1 per cent) and takeaway food (12.7 per cent), as shown below in Figure 38.

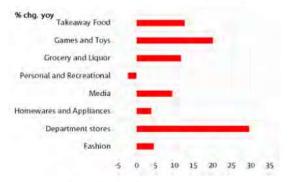


FIGURE 38: ONLINE RETAIL SALES BY INDUSTRY (YOY S.A.)

The introduction of Amazon in Australia is expected to contribute to the growth of online shopping and further impact bricks and mortar retail. While the Department of Industry, Innovation and Science expects Australia's small and dispersed population will mean the impact of Amazon will take time to gain a significant market share, it is estimated it could reach two per cent of retail sales within five years of entering Australia. This compares to five per cent current market share in the US⁴⁰.

It has been noted in both domestic and international contexts that growth in online retailing has led to increased demand for industrial and logistics property. Colliers International expects the demand for industrial space in Australian due to growth in eCommerce will occur over the shore, medium and long term and have greater emphasis on supply chain efficiency and effectiveness⁴¹. To compete with Amazon, it is expected Australian online retailers will need to make investment in automation to offer comparable services given Amazon's sophisticated and efficient automation systems that improve warehousing, logistics and distribution⁴².

For traditional 'bricks and mortar' retailers, to overcome the impact of online retailing and optimise centre competitiveness, landlords are providing increased floorspace for food, beverage, grocery and non-retail uses to align with strong customer trends towards dining out. Shopping centre are also exploring mixed-use options or change-of-use options where more value is extracted from the site by adding residential, commercial or hotels to surplus

⁴¹ Colliers International, 2018, 'eCommerce is driving Australian Industrial Investment', <u>https://www.colliers.com.au/news/2018/industrial-most-in-demand-property-asset-class-for-2018/</u>, date accessed: 28/03/2019

⁴² Department of Industry, Innovation and Science, 2017, Inquiry into impacts on local businesses in Australia from global internet-based competition, industry.gov.au, p. 11



northern

beaches council

Source: NAB, Online Retail Sales Index, January 2019

 ³⁸ NAB, 2019, 'NAB Online Retail Sales Index, Monthly Update – January 2019, <u>https://business.nab.com.au/nab-online-retail-sales-index-monthly-update-january-2019-33762/</u>, date accessed: 28/03/2019
 ³⁹ CBRE, 2015, Asia Pacific Consumer Market: How we like to shop online, <u>https://www.cbre.com/research-and-</u>

reports/apac-consumer-survey-how-we-like-to-shop online.

⁴⁰ Department of Industry, Innovation and Science, 2017, Inquiry into impacts on local businesses in Australia from global internet-based competition, industry.gov.au, p. 10



land or air space above centres. Entertainment, events and 'experiences' are also becoming more important to develop the social aspect of retail, as millennials seeks a different shopping experience than previous generations⁴³.

For large retailers, it is predicted that Australia's trend of department store floorspace expansion and the existing footprint of these stores will decrease as market share is lost to online retailers. For small retailers, it is expected that leveraging local customer relationships and providing in-store services and advice will continue to make these retailing options relevant⁴⁴.

The impact of international retailing competition on employment is unclear. It is expected Amazon's arrival will put pressure on job growth in traditional retail, but this could be offset by employment growth in other areas, such as logistics and warehousing. In the US, it was estimated 51 thousand jobs were lost in the general retail sector between 2007 and 2016 but this was outweighed by growth in 355 thousand warehousing jobs, noting Amazon is also headquartered in the US which may add weight to the increase in job numbers in this industry⁴⁵.

Considerations for Northern Beaches: Growth of smaller format supermarkets in centres may be arise; Warringah Mall is likely to continue to be a centre of gravity as a regional shopping mall; fine grain retailing could set smaller Local Centres apart from larger Strategic Centres; the rise of online retailing means the value of industrial lands for logistics in Northern Beaches could become more apparent.

4.2 Industrial and Urban Services Lands

Changes in Freight Transportation

Part of the experience of online retailing is also an expectation that goods will be rapidly delivered to customers. A study by McKinsey & Company found approximately one quarter of consumers would pay a premium for same-day delivery⁴⁶. With the growth in online retailing and e-commerce and raised expectations for speedy delivery, 'last mile' logistics has become a priority. In terms of land, this places an even higher value on logistics, industrial services and dispatch land uses in the right areas close to populations.

'Last mile' delivery is the final part of a product journey from warehouse to the customer doorstep and is often the most expensive and time-consuming part of the shipping process. In urban areas, traffic congestion is often one of the key issues affecting 'last mile' delivery. 'Last mile' delivery costs are about 53 per cent of the total cost of shipping. Additionally, customers have become less willing to pay delivery fees with the presence of some 'free shipping' options.

As a result, retailers and logistics companies are seeking new, technological solutions to improve the last leg of this process, and overcome geographical challenges, such as drones or crowdsourcing local delivery sources⁴⁷. However, in the interim, the value of industrial,

business.com/article/Convenience-Is-Key-in-Last-Mile-Delivery-around-the-World?gko=bef84, dated accessed: 28/03/2019



⁴³ JLL, 2018, 'Australian Shopping Centre Investment Review & Outlook 2018', <u>https://www.jll.com.au/content/dam/jll-com/documents/pdf/research/apac/australia/australian-shopping-centre-investment-review-outlook-2018.pdf</u>, dated accessed: 28/03/2019

⁴⁴ Department of Industry, Innovation and Science, 2017, Inquiry into impacts on local businesses in Australia from global internet-based competition, industry.gov.au, p. 12, 14.

⁴⁵ Department of Industry, Innovation and Science, 2017, Inquiry into impacts on local businesses in Australia from global internet-based competition, industry.gov.au, p. 18

⁴⁶ McKinsey & Company, 2016, 'How customer demands are reshaping last-mile delivery',

https://www.mckinsey.com/industries/travel-transport-and-logistics/our-insights/how-customer-demands-are-reshapinglast-mile-delivery, date accessed: 28/03/2019

⁴⁷ Business Insider, 2018, 'The Challenges of Last Mile Logistics & Delivery Technology Solutions',

https://www.businessinsider.com/last-mile-delivery-shipping-explained/?r=AU&IR=T, date accessed: 28/03/2019; Strategy + Business, 2018, 'Convenience is key in last-mile delivery around the world', https://www.strategy-

northern beaches council

logistics land and dispatch centres close to urban areas remains apparent and highly valuable for speed of delivery – particularly given land use is highly contested and land prices are high.

Advanced Manufacturing

Globally, manufacturing and the supply chains that support it are changing. While manufacturing covers a large spectrum of industries, services and products, increasingly complex and inter-connected changes are transforming these industries into what is collectively referred to as 'advanced manufacturing'.

The CSIRO defined advanced manufacturing as 'the set of technology-based offerings, systems and processes that will be used to transition the current manufacturing sector into one that is centred on adding value across entire supply chains'⁴⁸. Advanced manufacturing is where industrial and knowledge sectors are more closely integrated and have close links to research and development.

Examples of advanced manufacturing include the use of sensors and data analytics not only during production but across the whole value chain; replacing workers for hazardous tasks with assistive smart robotics and automation; and proactive integration of advanced materials in the early design phase like biodegradability, energy efficiency and self-repairing.

Driving this change are five mega trends:

- Made to Measure advances in technology and greater consumer expectations are causing a shift from mass production of goods to bespoke solutions.
- Service Expansion manufacturers are expanding their role in the value chain from making 'widgets' to developing tightly integrated service-product bundles.
- Smart and Connected advances in data capture and analytics are optimising
 operations across the manufacturing value chain and the factory floor.
- Sustainable Operations resource scarcity and increasingly valued environmental and social credentials are encouraging manufacturers to look for more efficient and sustainable processes and operating models.
- Supply Chain Transformations specialisation is promoting collaboration in some markets while technological advancements are enabling the vertical integration of others⁴⁹.

Success in fostering an advanced manufacturing economy is contingent upon a number of wider socio-economic and governance factors. The CSIRO identified several comparative advantages and disadvantages presented by the Australian economy in attracting or developing an advanced manufacturing sector, as shown in Table 19.

TABLE 19	: AUSTRALIA'S	COMPETITIVE	LANDSCAPE
----------	---------------	-------------	-----------

Comparative Advantages	Comparative Disadvantages
Education and research skills	High labour costs
Quality and standards	Geographical remoteness
Small and medium-sized enterprises	Small and dispersed domestic market
Access to Asia	Risk averse culture
Early adopters	Segregated national agenda
Political and economic stability	Commercialisation
Natural resources	Staff training and development

⁴⁸ CSIRO, 2016, Advanced manufacturing: roadmap for unlocking future growth opportunities for Australia, p. 6

⁴⁹ CSIRO, 2016, Advanced manufacturing: roadmap for unlocking future growth opportunities for Australia, p. 11





Intellectual property laws	Digital infrastructure
	Public perception
	Quality and quantity of leaders

Source: CSIRO, Advanced manufacturing: roadmap for unlocking future growth opportunities for Australia, p. 16-20

The Committee for Sydney notes cities are at the heart of this evolution in manufacturing and Sydney is well placed to lead the manufacturing revolution due to recent investment in infrastructure, the fact our universities are heavily invested in progressing the innovation agenda, and Sydney is a hub for tech start-up and fintech capital with the capacity for digital innovation and technology and the creative and design talent that underpins it⁵⁰.

Case Study: Industrial Lands & the Night-Time Economy

One Drop Brewing Co, South Sydney

One Drop Brewing Co is South Sydney's first microbrewery which was established in 2019. The Brewery is an example of what type of uses are emerging and adjoining industrial precincts. Food trucks come to the site every day of the week. The Brewery is open to the public five days a week 12pm to 8pm/10pm.



The philosophy behind One Drop Brewing Co is to support community, humanity, one love, free thinking and unique creative self-expression, all of which inspires the beer, the food, the tunes and atmosphere of the Brewery.

Source: One Drop Brewery Co, https://www.onedropbrewingco.com.au/, 2019

Metropolitan Industrial Land Policy

Both the Greater Sydney Region Plan and the North District Plan reference the importance of industrial lands in their policy. Industrial lands should be recognised not for the number of jobs they offer but the important urban services role it plays for the city.

⁵⁰ Committee for Sydney, 2017, Manufacturing 4.0 Cracking the code for Western Sydney, <u>http://www.sydney.org.au/wp-content/uploads/2015/10/Manufacturing-4.0.pdf</u>, date accessed: 12/04/2019, p. 4





Falling within the North District, Northern Beaches industrially zoned land has been designated as 'Retain and Manage', to arrest the gradual erosion of industrial land that has taken place over the past twenty years in Greater Sydney. Retain and manage is where all existing industrial and urban services land should be safe guarded from development pressure, particularly from residential and mixed-use land uses.

This policy direction sets a clear position that Northern Beaches industrial lands have a viable and, indeed, critical role to play in Greater Sydney's economy in the future. By providing certainty through policy, this enables Council and industries to plan for growth without the pressure of rezoning and the accompanying land speculation.

A study completed by SGS in 2018 for the Greater Sydney Commission about employment lands identified that there is now a mixture of businesses occurring in industrial zones with IN1 having the largest count of a mixture of businesses; IN2 having the highest density of a mixture of businesses and IN3 showing the greatest variety of businesses when compared to B5, B6, and B7.

As these land use zones are at risk of becoming a 'catch-all' for uses, a challenge will be to ensure there is a balance of businesses locating in these sites fulfil the critical role that industrial and urban services lands provide for local communities and are not overcome by 'creative-led gentrification'⁵¹.

Considerations for Northern Beaches: Metropolitan Industrial Lands Policy, changes in freight transportation and the importance of 'last mile' delivery and the opportunities that are opening up with the transition to advanced manufacturing production reiterate the value, importance and opportunities that could arise from the industrial and urban services lands in Northern Beaches LGA.

4.3 Night-Time Economy

A highly contested issue in Sydney in recent years, where it is argued the introduction of lockout laws in 2014 has impacted the economic strength and vibrancy of the 'after hours' hospitality and music industry in the city.

For Manly, there has been tension where some businesses believe they are losing money due to lock-out laws, but authorities believe the isolated geography in addition to a lack of afterhours public transport and a culture of binge drinking means the location is actually conducive to violence and therefore, lock-out laws should remain enforced⁵².

As shown in Figure 39, Core NTE establishments⁵³ fell between 2015 and 2016 and then increased post-2016. In contrast, Non-Core NTE activities⁵⁴ increased between 2015 and 2016 and continued to grow as 2016 progressed. The total economy of the Northern Beaches has exhibited growth over this period, yet Core NTE establishment fell, as shown in Figure 40. This suggests venues related to food, drink and entertainment may have been affected in the immediate years once the 2014 lock-out laws were introduced.

⁵⁴ Non-Core NTE activities includes those which operate in the evening and night-time to a greater or lesser degree such as retail trading (except liquor), hotels and guest houses



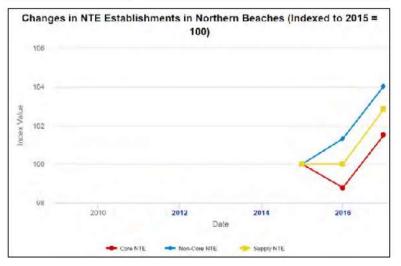
⁵¹ GSC, 2018, Metropolis That Works Paper, p. 24

⁵² ABC News, March 2008, Manly pubs urged to keep lockout, <u>https://www.abc.net.au/news/2008-03-28/manly-pubs-urged-to-keep-lockout/2385392</u>, dated accessed: 03/06/2019

⁵³ Core NTE denotes activities in three key sectors of food, drink and entertainment which are access by the public between 6pm and 6am.

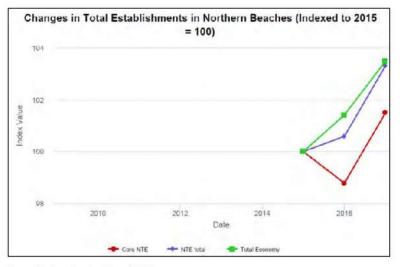






Source: Northern Beaches Council, 2019

FIGURE 40: CHANGES IN TOTAL ESTABLISHEMENT FOR NORTHERN BEACHES



Source: Northern Beaches Council, 2019

The value of the night-time economy in Greater Sydney is estimated to be over \$27.2 billion per annum, employing about 234,000 people and with over 180 night-time economy establishments per sq km in the Eastern Harbour City. The food sector contributed \$15.7 billion, entertainment sector contributed \$7.1 billion and the drinks sectors was valued as \$4.4 billion.

In the United Kingdom, the night-time economy makes up six per cent of the economy, whereas in Australia it makes up 3.8 per cent⁵⁵.

Deloitte argues it is reductive to simply focus on pubs, clubs and a drinking culture for the urban, young as all that makes up Sydney's night-time economy. A vibrant night-time economy should be seen as a broader range of activities that can include 24-hour gyms, late

⁵⁵ Deloitte, 2019, Imagine Sydney: Play, p. 29, 33, 34



night supermarkets, other late-night shopping options, late night museum and gallery openings, food festivals, as well as the obvious options of bars, restaurants, nightclubs, theatre and performances and sporting events. It would include a range of activities that appeal to all age groups, both locals and visitors. All of these activities then must be underpinned by extended hours of public transport.

Case Study: Governance & the Night-Time Economy, Amsterdam

The concept of the Night Mayor originated in Amsterdam in 2014. Creativity has been a key developmental element. A central operating principle was that the night was seen as a meeting point for creative talent - where like-minded individuals could find each other, creative talent could develop and blooms.

Achieving a vibrant nightlife is placed within industrial, government and spatial structures. The Night Mayor Structure is based around 20 positions including a board of directors, an advisory board and the Night Mayor board with backgrounds in nightclubs, festival, culture and diversity and safety legislation governance.

The Night Mayor position is funded by government, industries and self-raised monies. The role is to be a point of liaison that also spots trends, connects stakeholders, sets agendas and stimulates subcultures.



Source: Music Victoria.com.au

The potential value of Greater Sydney's night-time economy is thought to be around \$43.3 billion, approximately six per cent of Australia's economy⁵⁶.

Some aspects to consider in order to improve a night-time economy include:

- Increasing business potential Aussie NightMarkets in Western Sydney is a moving night market of food and shopping stalls that operates from 5pm to midnight five or six nights a week. Created by a group of entrepreneurs, in 2017 they were attracting about 12,000 visitors.
- Creating a platform for artistic creation and fostering a sense of identity for a region Parramatta Lanes has become an annual food and cultural festival that supports multiculturalism and local artistic expression.
- Sustaining visitor growth and cultural tourism by packaging cultural events with tourism. For example, Vivid Sydney travel packages are sold to tourists, including international tourists.
- Creating economic opportunity Eastwood has grown its night-time economy with development of the Eastwood Night Market and the Taiwan Night Market, suited in a

⁵⁶ Deloitte, 2019, Imagine Sydney: Play, p. 34





safe and vibrant pedestrianised town centre and include food, market retail and gaming areas, kids playground and outdoor performances⁵⁷.

- Consideration of local features and attributes does the area identified for nighttime economy development have additional drawcard features beyond simply the tenancy mix? Attributes could include views, a promenade, ability for kids to play somewhere in sight, dining outdoors or ample parking. Attributes should align with the size of the market and generate frequent engagement with the site and a sense of energy.
- Understand the population where young families may have different preferences to university students and Millennials.
- Consider the practicality of the activity the precinct for the night-time economy must be easily accessible, preferably have comfortable and passive surveillance features such as wider footpaths, pedestrianised malls or a promenade past outdoor dining, as well as visible security camera, high levels of street lighting and parking lighting.
- Providing a critical mass where floorspace includes retail, leisure and entertainment, rather than an emphasis on food catering⁵⁸.

Case Study: Laneways & Potts Point, Sydney

In 2013, the City of Sydney collaborated with Potts Point Partnership to develop a oneyear trial that granted an additional metre of outdoor dining spaces for cafes and restaurants in Llankelly Place. The Council worked alongside local businesses and residents to create a village feel and improve the sense of community in the laneway through the inclusion of better lighting, street market, public art and live jazz.

The trial was a success with more people visiting the area, new restaurants, increased staff hours for the existing restaurants and a reduction in the number of vacant shops. In 2018, City of Sydney considered extending the trial to other areas.



Source: Google Image 2019, Councillor Jenny Green.wordpress.com

Dr Rob Shaw, a geography lecturer at the University of Newcastle in the United Kingdom, also writes that it must be recognised that the night-time economy of a city is broader in the sense of being more than just entertainment and activities. The night-time economy has a practical and functional layer associated to it where people also work to 'reset' the city to make it inhabitable for daytime city functions. The night-time economy is also where workers clean the streets, conduct road works, organise distribution and logistics, or complete night-time shift work in places like hospitals.

⁵⁸ B&P, 2016, Beyond bars: 5 critical success factors for a booming night time economy,

^{*}The NTE components that made up this calculation were not clearly defined in the report but may have included a broader consideration than bars, clubs and restaurants.



⁵⁷ Deloitte, 2019, Imagine Sydney: Play, p. 35

https://www.brainandpoulter.com.au/food-trends/5-critical-success-factors-for-a-booming-night-time-economy/, date accessed: 10/04/2019



The trend in major European cities, such as London, Amsterdam and Paris, has been to employ night mayors. Shaw believe this is a positive move, but actions can be limited and focused towards improving the pub, bar and club scene. For example, in London, certain lines of the Tube network now run 24-hours a day which has been good for those going out and coming home from entertainment districts and for the people who work and service the entertainment districts. Yet, the Tube service actually only supports 20-25 per cent of people who work at night and usually not those working in healthcare, distribution or logistics. Figure 41 shows the variety of industries that evening and night-time employees work within London. Facilities and services, Shaw concludes, are needed that service broader range of activities that people do at night⁵⁹.

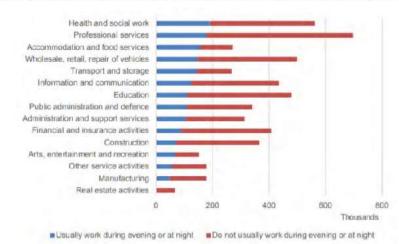


FIGURE 41: WORKERS IN MAJOR INDUSTRY GROUPS IN LONDON BY USUAL WORK PATTERN, 2017

Source: Mayor of London, https://www.london.gov.uk/sites/default/files/london_at_night - executive_report - final.pdf, date accessed: 11/04/2019

Considerations for Northern Beaches: There are two sides to the night-time economy for Northern Beaches to consider. On the social side, night-time activities need to cater to all demographics, and for a centre like Manly, to locals and visitors. The night-time economy in French Forest, Dee Why, Mona Vale and smaller Local Centres would also have to be developed. With the development of the Frenchs Forest health and education precinct, actions for the night-time economy would also have consider the more practical component – assisting the movements and safety of shift workers.

4.4 CoWorking Spaces

The phenomenon of coworking originated in 2005 in San Francisco and representing a 'third way' of working that was between the traditional format of an office workplace/community environments and the freelance/independent mode of work that was more isolated and tended to be homebased. The 'third way' was the practice of working individually but in a shared environment⁶⁰.

Coworking spaces are shared workplaces that are used by professionals working in different knowledge related industries, often freelance and self-employed workers. Physically, these

http://www.ephemerajournal.org/sites/default/files/pdfs/contribution/15-1gandini.pdf, date accessed: 15/05/2019



⁵⁹ Shaw, R, 2018, 'Newcastle at Night', University of Newcastle, <u>https://www.ncl.ac.uk/who-we-are/vision/ncl-at-night/?utm_source=fb&utm_medium=social&utm_campaign=vision&utm_term=link&utm_content=newcastle-at-night, date accessed: 11/04/2019</u>

⁶⁰ Gandini, A, 2015, 'The Rise of Coworking Spaces: A Literature Review',

coworking spaces are rented office facilities that can include a desk, wifi connection, common areas, as well as a range of other amenities like printers, private phone booths, 24/7 access, front desk services, mail and package handling and professional and social events. Rental options vary and can include a standalone office for a team, a hot desk in an open space or a permanent desk in a shared office⁶¹.

Case Study: Commune, Erskineville and Waterloo

Commune Erskineville is a re-purposed warehouse site located in the suburban backstreets off the Princes Highway. Commune provides the opportunity for people to rent out a communal desk space either on a full-time basis for \$155 per week or part time basis for \$100 per week. Spaces can be rented out for \$25 a day on a casual basis.

Commune Waterloo is a space is divided into a number of different areas that can be hired for small to large events of 1000 people. It includes studio spaces for use by photographers and artists. Creativity is supported and events that are held at Commune including regular yoga and dancehall by donation. Commune aims to foster collaboration, creative experiences and have a positive impact on the local community.





⁶¹ WeWork, https://www.wework.com/workspace, date accessed: 15/05/2019



northern beaches council

A European study completed in 2018 indicated the top five motivations for using a coworking space were:

- I was looking for a workplace outside my home
- · Vibrant and creative atmosphere in the coworking space
- Affordable accommodation
- Social interaction with co-workers
- The opportunity to network with co-workers.

Important attributes for the coworking space as identified by users, in order of importance, were:

- Accessibility
- Atmosphere and interior aesthetics
- Layout of the space
- Type of lease contract
- Diversity of tenant
- Reception and hospitality
- Events
- Diversity in supply spaces⁶².

Coworking spaces are seen to foster collaboration – one of the key elements required to drive innovation in business practice – with people working across firms and spreading ideas.

In recent years there has been an increase in the number of coworking spaces in Australia. In 2017, a total of 300 coworking spaces were counted, this was up from 60 spaces in 2013. Coworking spaces attracted mainly professional service workers and knowledge-based workers⁶³.

Technological improvements have provided an opportunity for people to engage in 'footloose' jobs. The defining characteristic of a footloose job is that they are not required for commercial purposes to be in a specific location. A recent study by SGS Economics & Planning found that the proportion of footloose jobs was increasing. Footloose jobs provide individuals with the opportunity to work location independent⁶⁴. Research by Reichenberger (2018) suggests that digital nomads are on the rise worldwide as footloose jobs allow individuals to engage in professional and spatial freedom through international travel⁶⁵. Overall, coworking spaces seed collaboration, creativity and present an opportunity to support the rise of the 'digital nomad', who can locate in high amenity locations.

Con Artist is a New York based coworking art space. The space is mixed use and provides a place for artists to work, create, hold events, and engage in community events.⁶⁶. Weekly night-time events such as Life Drawing runs from 7pm-10pm and provides a community and creative space for people to meet and draw. Such a space can be used to support and facilitate creativity and to grow innovation within the community.

Considerations for Northern Beaches: Coworking spaces have grown in popularity in recent years. The relevance of these spaces to the local population will have to be investigated more closely through business surveys to determine whether the local population has need of these spaces, and if so, what particular format would work best to support greater productivity.

⁶⁵ Reichenberger, 2018, 'Digital nomads – a quest for holistic freedom in work and leisure', <u>https://www-tandfonline-com.ezproxy1.library.usyd.edu.au/doi/pdf/10.1080/11745398.2017.1358098?needAccess=true</u>, date accessed 24/04/19
⁶⁶ Con Artist, 2019, 'About Con Artist', date accessed 23/04/2019, <u>https://conartistnyc.com/pages/about.php</u>



⁶² Weijs-Perree et al, 2018, 'Analysing user preferences for co-working space characteristics', Building Research & Information, 47:5, <u>https://www.tandfonline.com/doi/pdf/10.1080/09613218.2018.1463750?needAccess=true</u>, date accessed: 15/05/2019, pp. 542-3.

⁶³ Mahlberg, T 2017, 'Australian coworking spaces cater to a more diverse crowd than just young tech entrepreneurs', date accessed 15/04/2019.

⁶⁴SGS Economics and Planning, 2016, 'Macro-economic demographic factors shaping jobs growth', date accessed 24/04/2019



ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

Case Study: the WeCompany evolution, New York City

WeWork is an American company that started in New York City in 2010. The primary concept for the company was to offer coworking spaces for entrepreneurs with a 'green' and sustainable focus. By January 2019, WeWork had expanded to 100 cities around the world with 425 locations. The mission of the company has since transitioned to focus on the concept of 'community' as the future of work.

With the focus on building community, WeWork has again evolved and rebranded under the banner of the WeCompany. Coworking spaces and the WeWork offering remains a primary aspect of the company but now also includes the WeLive concept (coliving), WeGrow (a private elementary school in NYC where young students receive lessons from WeWork employees and clients) and now Made by We.

In 2019, on Broadway in the Flatiron District of NYC, Made By We opened. On the groundfloor is a retail-café-coworking space where members of the public can sit and have a coffee, reserve a desk and also purchase gift products made by WeWork members. Some of the WeWork offices also sell member products, by the Broadway location is the first to open its doors to the public.

Made By We's 96 desks are rentable for at least 30 minutes, starting at US\$6 and are reservable online.



Source: Google Image 2019, www.fastcompany.com, www.wework.com





4.5 An Ageing Population

In 1991, there were approximately 700,000 people aged 65 years and over in NSW. The NSW Government estimates by 2031 about 20 per cent of the NSW population, or 1.8 million people, will be aged over 65 years. Alongside an ageing population, population increase in the 15 to 64-year range will slow in the next few decades due to lower fertility rates⁶⁷.

The *NSW Ageing Strategy 2016-2020* highlights the need for a-whole-of-community response to the ageing population phenomenon, where change and preparation is required throughout government, the private sector, non-for-profit organisations, communities and individuals.

In relation to economic centres, actions to assist the needs of an ageing population and supporting greater health, wellbeing and quality of life and reduce isolation and loneliness, would be centred on two aspects:

- Creating employment opportunities that support their financial independence later in life.
- Ensuring economic centres cater to their shopping, medical care, social services, recreation and activities needs, and that the built environment, infrastructure and transport services to the economic centres supports their mobility needs.

The NSW Government notes older people can contribute to the economy and society as paid full-time or part-time workers, volunteers, and students in further education. They also provide support to family members and others as carers. They can influence the economy as consumers where their demands for services can create new markets and expand existing ones⁶⁸.

The World Health Organisation has identified a checklist of eight domains that should be addressed within a city to ensure it is 'age-friendly', as related to Figure 42. In relation the economic activity centres and employment, this could include civic participation and employment, outdoor spaces and building and transportation [to the economic activity centre].

For The Hague, The Netherland and Krakow, Poland this has included some of the following measures:

- Civic Participation and Employment: In the Hague there is a baking programme for older people, where the baked products are sold by volunteers and the money is used for leisurely activities and other programmes.
- Transportation: In the Hague bicycle lanes are well maintained and are being widened, there is free high-frequency transport for older people, delivery services from pharmacies to homes, voluntary taxi services for access to economic centre activities such as seeing the doctor or attending church and there is free rental of mobility scooters. In Krakow, free transportation for seniors aged 70 and over has been in place for a long time, and there are agreements with taxi companies.
- Outdoor spaces and building: In the Hague, green spaces are well maintained to
 encourage older persons to use the areas, ATMs are user-friendly. In Krakow, there has
 been more effort to create green spaces with benches and outdoors gyms that can be
 used by all ages.

⁵⁷ NSW Government, 2016, NSW Ageing Strategy 2016-2020: a whole of government strategy and a whole of community approach, p. 12; NSW Office of Local Government, <u>https://www.olg.nsw.gov.au/councils/integrated-planning-andreporting/councils-planning-for-an-ageing-population/why-plan-ageing-population</u>, date accessed: 24/05/2019 ⁵⁸ NSW Government, 2016, NSW Ageing Strategy 2016-2020: a whole of government strategy and a whole of community approach, p. 14





FIGURE 42: EIGHT DOMAINS OF AN AGE FRIENDLY CITY



Source: Van Hoof, 2018





Case Study: Creating Age-Friendly Cities

City of Monash, VIC

In 2016, the City of Monash was declared an 'Age Friendly City' by the World Health Organisation after Council and older residents worked for two years to develop the longterm Age Friendly Monash Plan.

Age Friendly Cities are where older people can live safely, maintain good health and be active in social activities.

Some of the economic activity actions from the Plan include:

- Improving and increasing the number of 'places to rest' in public places
- Review Council volunteer opportunities and work with key stakeholders to identify
 opportunities for volunteers to support community activities
- Promote government economic incentives for employing seniors to local employers
 Encourage businesses in Monash to embrace economic opportunities created by an ageing population through promotion of age friendly practices.

City of Melville, WA

The City of Melville worked with one of the biggest shopping centres in the LGA, Garden City, to become more age-friendly and accessible for older people in the future as the shopping centre doubled in size over the course of a five-year period.

Some of the aims of the project included:

- Encourage local businesses to implement age-friendly accessible initiatives
- Raise awareness among the business community to the requirements and benefits of becoming more age-friendly and accessible
- Support businesses to have access to free basic training and support around dementia.



Source: City of Monash, <u>https://www.monash.vic.gov.au/Services/Older-Adults/Age-Friendly-Monash</u>, date accessed: 26/05/2019; World Health Organisation, <u>https://extranet.who.int/agefriendlyworld/afp/age-friendly-garden-city-shopping-centre/</u>, date accessed: 26/05/2019





Case Study: the future of the Health Care and Social Assistance industry and its role in Northern Beaches LGA

The global trend of the shift towards older population has seen the rise of the Health Care and Social Assistance industry. As older people generally require more health services than younger people, there will be more demand on Health Care and Social Assistance services and an increase of health expenditure.

Health Care and Social Assistance industry is the largest employment industry in Australia (13.4 per cent of total employment), and projections indicate that Health Care and Social Assistance jobs will grow by a further 14.9 per cent over the next four years. Large jobs growth has been observed in Hospitals, Residential Care Services, Other Social Assistance Services and Allied Health Services.

The Northern Beaches Hospital delivered by the NSW Government in 2018 not only provides essential medical services to patients, particularly those in the Northern District, it is also a major job hub for people working in the Health Care and Social Assistance industry.

Like many other industries, the Health Care and Social Assistance industry will enter a period of rapid change according to the Economist. The Economist noted that innovation trends in healthcare point to a future where health is monitored constantly, and ondemand services are provided outside of hospitals. The Internet of Things (IOT) technology could enable doctors and allied health professionals to monitor patients' health statues and prompt individuals to live a healthy lifestyle. On-demand services and the application of IOT technology will drive further growth in Health Care and Social Assistance jobs. Northern Beaches LGA is well positioned to leverage from this growth, as there were many residents who studied Nursing (4,892 persons) and Human Welfare Studies and Services (2,985 persons). A smaller proportion of residents studied other Health fields such as Rehabilitation Therapy, Medical Studies, Dental Studies, Behavioural Science and others. Overall, 9.19 per cent of residents reported Health as their field of study and 13.54 per cent reported Society and Culture (includes Social Work and Psychology) as their field of study.



Source: NSW Health Infrastructure, https://www.hinfra.health.nsw.gov.au/our-projects/project-search/northern-beaches-hospital; Australian Government, Department of Employment, Skills, Small and Family Business 2018, https://www.employment.gov.au/newsroom/health-care-and-social-assistance-jobs-rise, date accessed: 03/07/2019

Considerations for Northern Beaches: The Northern Beaches has a significant ageing population. Design and access to economic centres in the LGA will have to consider their needs. Socially, businesses in these centres and the activities offered will have to cater to their abilities and interests to ensure they continue to be active and engage members of the community. With the rise in this population, the need for allied and social assistance services may increase within the LGA. Determining how the Frenchs Forest health and education precinct can assist this increase will be beneficial.





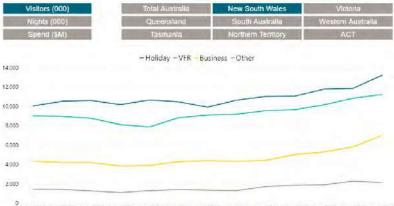
4.6 Visitor Economy

Tourism plays an important role in the Australian economy. The tourism economy accounts for 4.7 per cent of Australia's GDP and provides significant benefits and advantages to business. Greater Sydney welcomes 3.75 million international visitors who spend \$9.03 billion a year⁵⁹.

In 2017, 8.8 million international tourists visited Australia. Of these 8.8 million people the highest proportion of visitors came from China, this was followed by New Zealand, the United States, the United Kingdom, Japan and Singapore⁷⁰. In Australia, the most popular place for holiday makers was Sydney. The Sydney Opera House is ranked number one on the list of top attractions in Australia. Second, is the Great Barrier Reef, this is followed by Uluru⁷¹. The Sydney Harbour Bridge is ranked fourth, followed by the Blue Mountains. This suggests that the Greater Sydney area boasts some of the most internationally recognised tourism attractions in Australia⁷².

According to Tourism Research Australia, domestic overnight tourism for holiday, visiting friends and relatives and business have generally increased in recent years, as shown in Figure 43.





⁹ June 2006 June 2007 June 2008 June 2008 June 2010 June 2011 June 2012 June 2013 June 2014 June 2015 June 2016 June 2017 June 2018 Year ending

Source: Tourism Research Australia, 2019

In 2017/18, there were 2,464,956 international visitor nights and 1,522,023 domestic visitor nights in the Northern Beaches. This represented approximately 2.6 per cent of total international visitors nights and 1.5 per cent of domestic visitor nights in NSW. As referred to in section 3.3, in 2017/18, it was estimated that Northern Beaches LGA drew more international visitor nights and domestic day trips than NSW combined, see Figure 44. Visitation to Northern Beaches LGA has been variable overtime, however since 2015, it has generally increased to between 5,800,000 to 6,000,000 when accounting for international and domestic visitor nights and domestic day trips, see Figure 45.

named-australias-top-tourist-destination/ news-story/f6379d446 da7d5 0ebc4506bed14c7bbd, date accessed: 9/04/2019



⁶⁹ Greater Sydney Commission, 2018, <u>https://greater.sydney/metropolis-of-three-cities/productivity/jobs-and-skillscity/economic-sectors-are-targeted-success</u>, date accessed: 25/05/2019

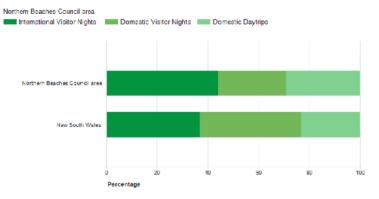
⁷⁰ Tourism Research Australia, 2010, <u>https://www.tra.gov.au/international/international-tourism-results/overview</u> date accessed 16/04/19

² Planetware, 2019, https://www.planetware.com/tourist-attractions/australia-aus.htm, date accessed: 16/04/2019

⁷² Tourism Research Australia 2013–14 Survey Results, news. com.au, www.news.com.au/travel/travelupdates/sydne



FIGURE 44: NORTHERN BEACHES LGA, BREAKDOWN OF VISITOR NIGHTS 2017/18



Source: Economy ID, https://economy.id.com.au/northern-beaches/tourism-visitor-summary, date accessed: 04/06/2019



FIGURE 45: NORTHERN BEACHES LGA, TIME SERIES – TOURISM NIGHTS

Source: Economy ID, https://economy.id.com.au/northern-beaches/tourism-visitor-summary, date accessed: 04/06/2019

Arts and Culture Based Tourism

A study by Deloitte Access Economics identified the economic visitation value for the arts and cultural scene in Sydney. The study found the highest value was attributed to cinema, (\$611m) followed by live music concerts (\$284m), live theatre or dance show (\$188m), and art gallery or museum (\$112).





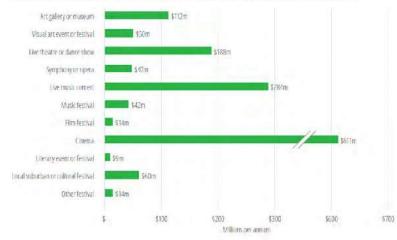


FIGURE 46: ECONOMIC VISITION VALUE FOR ARTS AND CULTURAL SCENE IN SYDNEY

Source: Deloitte, 2016

Nature Based Tourism

Nature based tourism is leisure travel undertaken largely or solely for the purpose of enjoying natural attractions and engaging in a variety of nature-based activities. Nature based tourism is currently experiencing growth.

In 2015, there was 13 per cent growth in international visitors who went to State and National Parks. In 2016, 68 per cent of all international visitors engaged in nature-based activity. Nature based tourism was also found to be popular among overnight domestic tourists, research suggests that 27 per cent of overnight tourists engaged in nature-based tourism⁷³.

Food & Wine Tourism

Tourism Australia reports that, of people who have never visited Australia, only 26 per cent associate the destination with good food and wine. Those who *have* visited Australia, rank the country as second across 15 major markets for food and wine experiences⁷⁴. This suggests food and wine tourism is of high quality in Australia but there is a need for this message to become more widespread.

Some of the most attractive food related experiences amongst high value travellers includes:

- Heritage: gourmet experiences which speak of a region's heritage and highlight local produce.
- Wellness: desire for balanced eating using the freshest and most nutritious produce.
- Occasions: experiences where the food takes centre stage at any price point from street food to find dining.
- Stories: the provenance, production, craftmanship of products and personalised culinary experiences⁷⁵.

In 2018, the NSW Government released its *NSW Food and Wine Tourism Strategy and Action Plan 2018-2022* that recognises the trend of eating and drinking local produce in a unique location or venue is an integral part of the travel experience and is a notable way to connect travellers with local customs and culture.

⁷⁵ Tourism Australia, 2019, Food and Wine, <u>http://www.tourism.australia.com/en/about/our-campaigns/food-and-wine.html</u>, date accessed: 27/05/2019



⁷³ Tourism Australia, 2017, https://www.ecotourism.org.au/assets/Uploads/Manifesto-v5.0.pdf, date accessed: 14/04/2019
⁷⁴ Tourism Australia, 2019, Food and Wine, http://www.tourism.australia.com/en/about/our-campaigns/food-and-

wine.html, date accessed: 27/05/2019



It has been estimated that in the year ending December 2017, there were approximately 1.3 million domestic wine travellers spending \$1 billion. In relation to food travellers, there was 3.5 million domestic overnight visitors spending \$3.1 billion and 1.4 million international visitors, spending \$5.4 billion⁷⁶.

Accommodation

The Australian accommodation monitor (2017-2018) found that Australian accommodation created \$14.7 billion worth of revenue. Australian capitals cities had the highest revenue per room and the highest occupancy rate at 79.8 per cent. Luxury and upper scale rooms were found to have a higher occupancy rate of 80.9 per cent which was compared to a 75.5 per cent of upscale and upper mid classes. The occupancy rate of midscale and economy rooms were found to have a 68.9 per cent occupancy rate⁷⁷.

Considerations for Northern Beaches: Northern Beaches contains a number of valuable natural assets. Given tourism and visitors are such an important component of the Greater Sydney economy, identifying how they can better access and engage in activities or business within the LGA is important.

4.7 Sustainability

In 2015, 193 Member States including Australia adopted the 2030 Agenda for Sustainable Development. It provides a blueprint for countries to work together to tackle climate change and achieve a sustainable future through improving health and education, reducing inequality, fostering economic growth, preserving oceans and forests and collaboration. The Agenda aims to integrate the social, environmental and economic dimensions of sustainable development.

Australia Government is on the way to achieve Goal 11: Sustainable Cities and Communities through its many initiatives. In 2016, the Australian Government set out its national approach to cities in the 2016 Smart Cities Plan which outlines a vision for productive and liveable cities by driving collaboration between all levels of government, the private sector, research organisations and the community. The Smart Cities Plan includes three pillars: Smart Investment, Smart policy and Smart Technology.

The Government invested \$50 million in the Smart Cities and Suburbs Program to support the delivery of innovative smart city projects. 21 projects in NSW were funded through this program including 3D Technology for Urban Planning in Woollahra, ChillOUT Smart Social Spaces in Georges River, Energy Data for Smart Decision Making for several LGAs including Northern Beaches, Interactive City management in Melbourne, Liveable Neighbourhoods in Lake Macquarie and Sydney City and Melrose Park: Smart Planning for Climate Responsive Neighbourhood. These projects are at various stages and addressing different issues such as mobility, social health, urban irrigation, energy and water systems and management of cities.

New developments and urban renewal projects are central to the development of sustainable cities and communities. Many developers have integrated the Sustainable Development Goal into their projects. One recent example is the development of Barangaroo. The 22-hectare disused container wharf was converted into a mixed-use precinct with the goal of a carbon neutral precinct. In 2009, the NSW Government committed Barangaroo to the Climate Positive Development Program. Barangaroo includes centralised infrastructure such as Sydney Harbour water cooling, embedded electricity networks, recycled water treatment plants and on-site renewable energy generation. External agencies, contractors and organisations are required to contribute to the Sustainability Goals through the following measures:

https://www.destinationnsw.com.au/wp-content/uploads/2018/11/nsw-food-and-wine-tourism-strategy-and-action-plan-2018-2022.pdf?x15361, date accessed: 27/05/2019

⁷⁷ Tourism Research Australia, 2010, <u>https://www.tra.gov.au/Economic-analysis/Australian-Accommodation-Monitor/aam-</u>2018, date accessed: 16/04/2019



⁷⁶ NSW Government, 2018, NSW Food and Wine Tourism Strategy and Action Plan 2018-2022,



- Carbon neutral. All buildings at Barangaroo are required to report annual greenhouse gas emissions and contribute to renewable energy and carbon offsets.
- Water positive. The precinct uses captured rainwater and treated water for toilet flushing, irrigation, wash down and fire suppression.
- Zero waste emissions. At Barangaroo, all food, office, commercial and industrial waste is treated and managed using methods that are climate neutral.
- Community well-being. More than 50 per cent of Barangaroo will be public space.

Case Study: Smart Social Spaces: Smart Street Furniture supporting Social Health, Georges River Council Area

University of New South Wales and Georges River Council have been awarded the Round One Smart Cities and Suburbs Program funding to pilot a smart infrastructure management system. This project used a variety of environmental IoT sensors (sound sensors, use counters, flow meters, power draw counters etc.) to record real-time use of urban furnishings in public spaces. This enables efficient and informed management of public space and its infrastructure in a local government precinct.

This project also designed and tested a new smart street furniture which includes General Power Outlets (GPO), USB outlets and a water tap. The street furniture allows people to recharge their phones, wash their hands and use cooking appliances. Georges River Council has since then secured the Round Two funding and will deliver smart outdoor community spaces called ChillOUT hubs that utilise IoT environmental sensors and provide Wifi access points, flexible work and rest spaces. The ChillOUT hubs are community spaces where people can connect technologically, professionally and socially, at the same time, they collect data that will aid Council's future planning.



Source: Georges River Council, https://www.georgesriver.nsw.gov.au/Council/About-Your-Council/Publications/Media/Smart-city-innovations-to-connect-the-Georges-Rive





Case Study: Vertical Farming using Hydroponics - Sproutstack

With the global population projected to grow to 9.8 billion in 2050, the demand for food and other agricultural products will increase. Agricultural production that depends on soil and water might not be sufficient to meet future demands as climate change could cause declines in overall productivity. It has been found that changeable weather conditions are the primary driver of variations in agricultural output over time. There are opportunities to use more sustainable and less space restricted way of farming. As 80 per cent of all food is expected to be consumed in cities by 2050, urban farming presents a unique opportunity to reduce food miles and carbon footprints.

One method that is not restricted by weather conditions is hydroponic farming. Hydroponic farming doesn't require soil, instead it applies a nutrient-rich solution to deliver water and minerals to the roots of the plants. Weather conditions do not affect hydronic farms as the crops grow in a controlled environment unaffected by fluctuating rainfalls and changes in temperature. A report by Ellen Macarthur Foundation suggests a theoretical maximum of one-third (by weight) of the food needed in urban areas could be grown within cities. One of the main challenges to this hypothesis is the availability of land for urban farming. Hydroponic farming is more space efficient than outdoor production.

Sprout Stack is a Sydney based indoor-farming business that uses hydroponics to grow crops in a shipping container. The founders of Sprout Stack wanted to increase food production in a sustainable way to meet future demands. Sprout Stack grows crops indoors with LED lights to provide ideal light all year round. The automated irrigation system uses 95 per cent less water than traditional growing systems. The shipping containers can be placed near residential areas and therefore reducing food miles.



Source: SBS 2018, https://www.sbs.com.au/news/small-business-secrets/article/2018/07/20/sprout-stack-changing-face-australian-farming

Considerations for Northern Beaches: Northern Beaches Council is aiming to be a leader in sustainability. Case studies highlight there are innovative business and design concepts that could be implemented to help progress the sustainability agenda within the LGA.





4.8 Key Findings

All facets of the retail landscape are changing

The retailing landscape is varied and changing. Some of the new supermarkets offerings are smaller in format with a more tailored and gourmet selection of foods and are also aimed at appealing to time-poor workers that want healthy and ready-to-go meals. Growth of smaller format supermarkets in centres may arise in the Northern Beaches.

Regional shopping centre maintain popularity but are also becoming more mixed-use centres to compete with the rise in online retailing. Fine grain retailing offers a point of difference to centres that contain large shopping centres and can encourage a more unique, boutique experience at a human scale. Warringah Mall is likely to continue to be a centre of gravity as a regional shopping mall for the LGA. Fine grain retailing could set smaller local centres apart from the larger strategic centres. The food and dining scene have seen strong success in cafes, some restaurants are building the 'experience' components with other activity to attract diners and food courts are redeveloping to engage with the 'outdoors' and improve amenity.

Online retailing is impacting traditional bricks and mortar retailing and these retailers are having to find new ways to engage and attract customers. Online retailing growth has increased the value of industrial and urban services lands that process these products and reiterates the value of these lands in the LGA.

Retaining valuable industrial and urban services lands

With the rise in online retailing, the value of industrial and urban services lands for logistics uses located in close proximity to residential areas has never been more apparent. Advanced manufacturing has seen the inclusion of greater technology in the manufacturing process and some of these types of manufacturing processes could locate in the industrial precinct into the future. There has also been growth in creative led land uses in these areas. Ensuring these lands in the Northern Beaches LGA are retained will be important to ensure industrial and urban services provide for local communities and are not overcome by creative-led gentrification.

There are two components to a night-time economy that require a planning response

A night-time economy has two components, firstly, a practical and functional component where services, safety and amenity assist late-night workers and shift workers. A relevant planning response will be required around the Frenchs Forest centre in this regard. Secondly, a more social component where events, places and activities should cater to the needs and interests of the local community in the LGA. Local studies and policies indicate this is a key priority for the Northern Beaches and will have to be progressed in centres like Manly, Dee Why, Mona Vale and the smaller local centres.

Coworking spaces can take many forms

Coworking spaces can cater to different work styles for individuals to small companies, for freelancers, independent workers and start-ups. Coworking spaces can support a variety of concepts, such as promoting the arts, sustainability or the concept of community. Some coworking spaces are evolving to include cafes and retail spaces.

The relevance of these spaces to the local population will have to be investigated more closely through business surveys to determine whether the local population has need of these spaces, and if so, what particular format would work best to support greater productivity.





Employment opportunities, changes to the built environment and economic services and activities will be needed to support the ageing population

The Northern Beaches has a significant ageing population. Design and access to economic centres in the LGA will have to consider their needs. Socially, businesses in these centres and the activities offered will have to cater to their abilities and interests to ensure they continue to be active and engage members of the community. With the rise in this population, the need for allied and social assistance services may increase within the LGA. Determining how the Frenchs Forest health and education precinct can assist this increase will be beneficial. Economic centres must also respond and cater to the rest of the population in the LGA, including those migrating in to the LGA that will help replenish the workforce.

There are many strengths to tourism in Australia

Arts and culture-based tourism, food and wine centred tourism and nature-based tourism are all strongly represented within the NSW visitor economy. There is potential for these areas to be capitalised upon further in NSW.

Northern Beaches contains a number of valuable natural assets. Given tourism and visitors are such an important contributor to the Greater Sydney economy and Manly is already internationally recognised as a key tourism site; it will be valuable to ensure visitor access and ability to engage in local activities or local businesses within the LGA is important. Protecting the natural environmental should also be a key consideration.

The drive to build sustainable and smart cities

Actions to tackle climate change have to be supported by all levels of government. The Australian Government has adopted the Agenda for Sustainable Development. Technology offers local councils innovative ways to contribute and progress this movement.

Northern Beaches Council is aiming to be a leader in sustainability. Case studies highlight there are innovative business and design concepts that could be implemented to help progress the sustainability agenda within the LGA.





5. EMERGING INSIGHTS

5.1 Challenges

Frenchs Forest Town Centre - severance and impact

French Forest will have the potential to develop health and education and retail industries, as well as commercial (office) through the business park for the LGA. However, the 'centre' has significant severance issues with the hospital and retail and business park located either side of the Warringah Road, as well as how it encompasses the current ForestWay shopping centre.

The growth of this centre may impact other centres in the LGA, such as a decline of Manly or Mona Vale hospitals for employment opportunities as a consequence of the growth of Northern Beaches Hospital. A number of other precincts across Greater Sydney have been designated 'health and education precincts' by the Greater Sydney Commission and there has been no State or Federal commitment to progress tertiary education. Frenchs Forest will be competing with more well-established, more accessible health precincts to attract highly skilled professionals and key workers.

Brookvale as an ill-defined centre

The Brookvale centre suffers from relatively low amenity and a lack of central public space design, a mix of uses in the industrial zone and a dominant Westfield shopping centre that is the centre of gravity for the local population.

There is a challenge in protecting the industrial and urban services lands in Brookvale and balancing it with the other major role of Brookvale, its population serving role alongside an increasing pace of change. Brookvale will assist development of the local economy and changing business models such as advanced manufacturing and increased pressure on 'last mile delivery'. Another challenge will be enabling this transition while protecting core industrial and urban service operations.

Strengthening the role of Dee Why as a strategic centre

With low amenity and dominated by Pittwater Road, Dee Why lacks the vitality of a strategic centre.

Tension with competing uses in Manly centre

The Manly catchment has exhibited the highest growth rate in employment between 2011-2016. Place of work data indicates the Manly catchment has a high share of professional related jobs. Accessibility to Manly is limited. Policy directives for the centre are aimed at encouraging a large mix of uses in tourism, retail and entertainment components of the centre, as well as diversifying commercial activity. Together, these factors have potential to create tension within Manly centre.

Elevating Mona Vale to fulfil its role as a strategic centre

Mona Vale functions like a local centre and is less accessible by public transport than most other centres in the LGA.





Protecting the integrity of the industrial precincts

There is a lack of distinction between commercial and industrial uses in the Brookvale precinct where these land uses also need protection from residential pressures. The value of these lands, in performing important functions for cities and populations, needs to be recognised. The provision of jobs and services close to where people live, and other businesses are critical to the productivity of the North District and Greater Sydney

Understanding what it means to work locally and changing perceptions

Given the high rates of self-containment in the LGA, there is a need to better understand and define this concept, understanding the requirements of workers so that economic centres and population serving industries and coworking spaces respond to worker needs. The Northern Beaches is perceived by residents and local businesses as a place to relax, rather than being a credible business place.

Employment and economic centres meet the needs of the ageing population, and helps maintain generational diversity of the population

Ensuring employment opportunities, the built environment of economic activity centres and the businesses within them caters to the mobility, essential services and employment needs of the ageing population in the LGA. The types of goods, services and experiences sort by older generations in Northern Beaches may be different to the past. Economic centres will also have to meet the needs of others in the Northern Beaches community and encourage diversity by attracting, or retaining, other generations – strengthening the community.

Lack of connectivity and accessibility - internal and external

Overall, the LGA suffers from a lack of connectivity within many centres, topography and severance issues with high rates of private vehicle use. Distance has been identified as an issue for many businesses. Lack of public transport and car parking are also issues. Externally, there is significant movement of workers between Northern Beaches LGA to Sydney CBD, North Sydney and Willoughby, improving connections out of the LGA to these areas would be valuable.

5.2 Opportunities

Frenchs Forest - improving connectivity and the business park

The Frenchs Forest Business Park is a valuable asset in current form and function. It could take on a higher commercial (office) component for the LGA and will require amenity improvements. Consideration of night-shift workers in the hospital precinct and ensuring good amenity and safety in design in included in future development.

Integrating sustainable design elements into the new centre to support the sustainability intent of the LGA could be considered. There is opportunity to shape the future direction of the town centre in alignment with local employment objectives. Design and place branding should build on existing local strengths and aim to attract highly skilled job opportunities and workers.

Improving the functionality of Brookvale

Leverage the high level of transport connectivity in Brookvale and the diversity land uses in terms of retail, industrial and urban services, to make this centre the focus for employment, higher order retail and complementary to the role of Dee Why. Key to centre development will be integrating Warringah Mall with surrounding land uses, improving urban amenity (particularly between the retail and industrial zones) and creating a 'town centre-activity point' outside of Warringah Mall.





Determine the 'right' mix of industrial and urban services uses for the centre, protecting valuable industrial and urban services lands and ensuring creative-led gentrification does not impact the original function of the land use. Recognise there are transitions in business models occurring, such as advanced manufacturing. There is opportunity to leverage these transitions.

Dee Why as a civic and population serving centre

To complement the role of Brookvale, Dee Why centre can be a focal point for civic functions and population servicing industries for the surrounding residential populations. Improving the amenity and vitality of the centre will be key and leveraging the high transport accessibility of the area.

Developing a clear vision for Manly centre to help reduce future land use conflict

A clear vision and balancing competing industry land use into the future will be required. Continuing to build the tourism role of Manly could be a key focus given the widespread recognition of Manly as a visitor site. Consideration of coworking spaces to cater to selfcontained, professional jobs could be developed, as well as focusing commercial growth elsewhere in the LGA.

Mona Vale - the strategic centre for the northern portion of the LGA

Recognising other centres in the LGA will be strong attractors of commercial (office), higher order retail and industrial, Mona Vale centre will have to fulfil a complementary role. Like Dee Why, it will have to fulfil a population serving function for the residential communities of the northern area.

Developing the population serving role of smaller, local centres

Grow smaller, local centres to fulfil a primarily population serving role, especially as the population ages. Investigating coworking space given the high rate of self-containment in some of these centres.

Improving internal and external connectivity

Given the significant number of workers, in particular Knowledge Intensive workers, travelling between Northern Beaches LGA and other areas for employment such as Sydney CBD, North Sydney and Willoughby – ensuring efficient transport connections will be valuable to productivity. Improving local level connectivity to improve access, vitality and safety within the LGA.

Strengthen small and medium business opportunities and recognise entrepreneurial strengths

As an opportunity to grow local employment, ensure economic activity centres support the establishment of small and medium businesses. This could potentially be through grants or programs or co-working spaces. There is opportunity for further exploration to understand the potential of coworking and innovative environments to boost employment options.

Support the development of a diverse night-time economy

Highlighted as a priority for the LGA in local studies, supporting increased access, convenience, safety, capacity and diversity of activities of the night-time economy in the economic activity centres is an opportunity area.

Strengthen job containment and self-sufficiency

By improving economic activity centres - the vibrancy, urban design and functionality, as well as achieving the right branding and vision for a centre and opening employment opportunities, this could help to increase the self-sufficiency of the LGA. Furthermore,





building the local business community network; changing perceptions and attitudes about the Northern Beaches and highlighting its business potential and encouraging residents to work from home once a month could also assist.

5.3 Questions

- In light of the Greater Sydney Commission directives to 'protect and preserve' industrial land, what should be the future vision for Brookvale town centre?
- Brookvale is a unique centre that contains a valuable portion of industrial and urban services land for the North District, which also contributes to the productivity of Greater Sydney. What sort of industrial and urban services mix should be contained in Brookvale centre?
- If an area of town centre activity were to be developed in Brookvale to help improve amenity and provide a focal point for community activity, ideally where would it be located?
- How can the industrial precinct of Brookvale support new business models?
- How could Dee Why centre better serve the needs of the local population in terms of population serving businesses (such as retail, food servicing), amenity and civic function?
- What sort of role should Manly centre have in the future?
- How could Mona Vale centre better serve the needs of the community?
- What does 'working locally' mean to residents of the Northern Beaches LGA? Should there be greater emphasis on population services in local centres to support people who are located at home to work? To what extent would the commuting workforce consider working locally for a portion of the week?
- How could small businesses be better supported in the economic centres of Northern Beaches LGA?
- Would coworking spaces be a valuable addition to economic centres in the LGA? If so, where and what type of coworking spaces are needed?
- In relation to the economic centres of Northern Beaches LGA, what are the needs of the ageing population in relation to larger Strategic Centres and smaller, Local Centres?
- Housing affordability is a barrier for key workers to be able to live and work locally. What
 other barriers do key workers face in terms of being able to live and work locally? How
 can the economic centres of the LGA better serve key workers?
- What sustainability actions/design/activities would you like to see implemented in the economic centres and businesses of Northern Beaches LGA?
- What high-value niche industries exist in the Northern Beaches? Where are they located and why? Could they be leveraged to grow highly skilled employment opportunities?
- What types of commercial businesses and workforce should Council seek to attract to the Frenchs Forest precinct? For these particular commercial businesses, what type of precinct/work environment would be attractive?





5.4 Next Steps

Next steps in the study will explore the issues and insights that have emerged from this preliminary review to develop a series of strategies and recommendations to inform the future planning of economic activity centres and employment precincts in the Northern Beaches LGA.

This will take the form of planning control recommendations, strategic directions and economic development opportunities to ensure the Northern Beaches local economy makes the most of its advantages and puts in place strategic to overcome the challenges it faces.



REFERENCES

northern

beaches council

ABC News, March 2008, Manly pubs urged to keep lockout, <u>https://www.abc.net.au/news/2008-03-28/manly-pubs-urged-to-keep-lockout/2385392</u>, dated accessed: 03/06/2019

ABS Census 2006, 2011, 2016

Australian Organic, 2018, Australian Organic Market Report, <u>https://user-</u> cprcmgz.cld.bz/Australian-Organic-Market-Report-2018, date accessed: 09/04/2019

B&P, 2016, Beyond bars: 5 critical success factors for a booming night time economy, https://www.brainandpoulter.com.au/food-trends/5-critical-success-factors-for-a-booming-nighttime-economy/, date accessed: 10/04/2019

Blue Mountains Council, 2018

Business Insider, 2018, 'The Challenges of Last Mile Logistics & Delivery Technology Solutions', https://www.businessinsider.com/last-mile-delivery-shipping-explained/?r=AU&IR=T, date accessed: 28/03/2019

CBRE, 2015, Asia Pacific Consumer Market: How we like to shop online, https://www.cbre.com/research-and-reports/apac-consumer-survey-how-we-like-to-shop-online.

City of Monash, 2018, 'Age Friendly Monash', <u>https://www.monash.vic.gov.au/Services/Older-</u> Adults/Age-Friendly-Monash, date accessed: 26/05/2019

City of Sydney, 2015, George Street 2020 – A public domain activation strategy, part 3, https://www.cityofsydney.nsw.gov.au/ data/assets/pdf file/0010/308827/George-Street-2020-A-Public-Domain-Activation-Strategy_Part3.pdf, date accessed: 09/04/2019

Colliers, 2016, Back to the Future: light rail to spur CBD retail growth, Research and Forecast Report: First Half 2016

Colliers International, 2018, 'eCommerce is driving Australian Industrial Investment', https://www.colliers.com.au/news/2018/industrial-most-in-demand-property-asset-class-for-2018/, date accessed: 28/03/2019

Commercial Property Guide, 2019, 'Sub-regional shopping centres set course for survival', https://www.commercialpropertyguide.com.au/blog/investing/sub-regional-shopping-centres-setcourse-for-survival-126, date accessed: 10/04/2019

Committee for Sydney, 2017, Manufacturing 4.0 Cracking the code for Western Sydney, <u>http://www.sydney.org.au/wp-content/uploads/2015/10/Manufacturing-4.0.pdf</u>, date accessed: 12/04/2019

Commune Co-Working, 2016

Con Artist, 2019, 'About Con Artist', date accessed 23/04/2019, https://conartistnyc.com/pages/about.php

Councillor Jenny Green.wordpress.com

CSIRO, 2016, Advanced manufacturing: roadmap for unlocking future growth opportunities for Australia

Deloitte, 2019, Imagine Sydney: Play

Department of Industry, Innovation and Science, 2017, Inquiry into impacts on local businesses in Australia from global internet-based competition: Department of Industry, Innovation and Science submission, industry.gov.au

Destination NSW, 2018, tourism data for Manly,



Northern Beaches Employment Study – background report

110



Domain, 2019

Economy ID, https://economy.id.com.au/northern-beaches/tourism-visitor-summary, date accessed: 04/06/2019

Gandini, A, 2015, 'The Rise of Coworking Spaces: A Literature Review', <u>http://www.ephemerajournal.org/sites/default/files/pdfs/contribution/15-1gandini.pdf</u>, date accessed: 15/05/2019

Google Image, 2019

Greater Sydney Commission, 2017, Fine Grain People Places, <u>https://issuu.com/roberts-day-global/docs/gsc_fin_fine_grain_people_places_</u>, date accessed: 10/04/2019

Greater Sydney Commission, 2018, Metropolis That Works, Thought Leadership Series, https://gsc-public-1.s3.amazonaws.com/s3fs-public/gsc-thought-leadership-tlp2018-1-metropolisthat-works-181023.pdf, date accessed: 27/05/2019

Grimmer, L & Mortimer, G, 2018, 'Honey I shrunk the store: why your local supermarket is getting smaller', <u>https://theconversation.com/honey-i-shrunk-the-store-why-your-local-supermarket-is-getting-smaller-98246</u>, date accessed: 10/04/2019

Hatch, P, 2018, 'Coles opens its own little shop as battle for customers goes small', <u>https://www.smh.com.au/business/companies/coles-opens-its-own-little-shop-as-battle-for-</u> <u>customers-goes-small-20181113-p50foj.html</u>, date accessed: 15/05/2019

IBISWorld, 2019, 'Convenience Stores in Australia', www.ibisworld.com.au

IBISWorld, 2018, 'Cafes and coffee shops in Australia', www.ibisworld.com.au

Inside Retail, 2014, 'Should retailers extend trading hours?', <u>https://www.insideretail.com.au/news/retailers-extend-trading-hours-201407</u>, date accessed: 09/04/2019

JLL, 2018, 'Australian Shopping Centre Investment Review & Outlook 2018', https://www.jll.com.au/content/dam/jll-com/documents/pdf/research/apac/australia/australianshopping-centre-investment-review-outlook-2018.pdf, dated accessed: 28/03/2019

Mahiberg, T, 2017, 'Australian coworking spaces cater to a more diver crowd than just young tech entrepreneurs', date accessed: 15/04/2019

Mayor of London, <u>https://www.london.gov.uk/sites/default/files/london_at_night_</u> __executive_report___final.pdf, date accessed: 11/04/2019

McKinsey & Company, 2016, 'How customer demands are reshaping last-mile delivery', <u>https://www.mckinsey.com/industries/travel-transport-and-logistics/our-insights/how-customer-</u> <u>demands-are-reshaping-last-mile-delivery</u>, date accessed: 28/03/2019

Mitchell, S, 2018, 'Coles unveils first Coles Local convenience store format', Financial Review, https://www.afr.com/business/retail/coles-unveils-first-coles-local-convenience-store-format-20181111-h17r25, date accessed: 10/04/2019

Music Victoria, 2018,

https://musicvictoria.com.au/assets/2018/reports/Night%20Time%20Economy%20Summit%20Re port%202018-sml.pdf, date accessed: 18/05/2019

NAB, 2017, The Future of Retail: the trends reshaping retail and the future implications for the Australian marketplace', <u>https://business.nab.com.au/wp-content/uploads/2017/09/The-future-of-retail-September-2017.pdf</u>, date accessed: 09/04/2019

NAB, 2019, 'NAB Online Retail Sales Index, Monthly Update – January 2019, https://business.nab.com.au/nab-online-retail-sales-index-monthly-update-january-2019-33762/,

date accessed: 28/03/2019





NSW Government, 2016, NSW Ageing Strategy 2016-2020: a whole of government strategy and a whole of community approach

NSW Office of Local Government, <u>https://www.olg.nsw.gov.au/councils/integrated-planning-and-reporting/councils-planning-for-an-ageing-population/why-plan-ageing-population</u>, date accessed: 24/05/2019

One Drop Brewery Co, https://www.onedropbrewingco.com.au/, 2019

Property Council of Australia, 2017, 'Top five food retailing trends in 2018, https://www.propertycouncil.com.au/Web/Content/News/National/2017/Top_five_food_retailing trends in 2018.aspx, date accessed: 09/04/2019

Reichenberger, 2018, 'Digital nomads – a quest for holistic freedom in work and leisure', <u>https://www-tandfonline-</u> <u>com.ezproxy1.library.usyd.edu.au/doi/pdf/10.1080/11745398.2017.1358098?needAccess=true</u>, date accessed 24/04/19

Roy Morgan Research 2015, 'The ALDI effect: Australia's changing supermarket scene' – 22 June 2015 <u>http://www.roymorgan.com/findings/6297-aldi-effect-australias-changing-supermarket-scene-201506220132</u>

SGS Economics and Planning, 2016, 'Macro-economic demographic factors shaping jobs growth', date accessed 24/04/2019

Shaw, R, 2018, 'Newcastle at Night', University of Newcastle, <u>https://www.ncl.ac.uk/who-we-are/vision/ncl-at-</u>

night/?utm_source=fb&utm_medium=social&utm_campaign=vision&utm_term=link&utm_conte nt=newcastle-at-night, date accessed: 11/04/2019

Strategy + Business, 2018, 'Convenience is key in last-mile delivery around the world', https://www.strategy-business.com/article/Convenience-Is-Key-in-Last-Mile-Delivery-around-the-World?gko=bef84, dated accessed: 28/03/2019

Van Hoof et. al., 2018, 'The Challenges of Urban Ageing: Making Cities Age-Friendly in Europe', International Journal of Environmental Research and Public Health, Nov 15(11): 2473, <u>https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6266083/</u>, date accessed: 26/05/2019 Weijs-Perree et al, 2018, 'Analysing user preferences for co-working space characteristics', Building Research & Information, 47:5, <u>https://www.tandfonline.com/doi/pdf/10.1080/09613218.2018.1463750?needAccess=true</u>, date accessed: 15/05/2019, pp. 542-3.

WeWork, https://www.wework.com/workspace, date accessed: 15/05/2019

World Health Organisation, 'Age friendly garden city shopping centre', https://extranet.who.int/agefriendlyworld/afp/age-friendly-garden-city-shopping-centre/, date accessed: 26/05/2019



APPENDIX 1- BROAD INDUSTRY CATEGORIES (BIC) DEFINITION

In conjunction with the Greater Sydney Commission (GSC), SGS Economics and Planning has categorised ANZSIC Divisions into four broad Industry Groups (also known as Broad Industry Categories – BIC). The following table illustrates the classification.

TABLE 20: INDUSTRY GROUPS

ANZSIC 2006 Division Code	ANZSIC 2006 Division Title	Group
J	Information Media and Telecommunications	Knowledge Intensive
К	Financial and Insurance Services	Knowledge Intensive
L	Rental, Hiring and Real Estate Services	Knowledge Intensive
M	Professional, Scientific and Technical Services	Knowledge Intensive
Ν	Administrative and Support Services	Knowledge Intensive
0	Public Administration and Safety	Knowledge Intensive
Р	Education and Training	Health and Education
Q	Health Care and Social Assistance	Health and Education
E	Construction	Population Serving
G	Retail Trade	Population Serving
н	Accommodation and Food Services	Population Serving
R	Arts and Recreation Services	Population Serving
S	Other Services	Population Serving
A	Agriculture, Forestry and Fishing	Industrial
В	Mining	Industrial
С	Manufacturing	Industrial
D	Electricity, Gas, Water and Waste Services	Industrial
F	Wholesale Trade	Industrial
1	Transport, Postal and Warehousing	Industrial

Source: ABS ANZSIC 2006 Support Tool, SGS Economics and Planning and GSC 2016



northern

beaches council



APPENDIX 2 – UNDERSTANDING DATA AND MEASURES

Disclaimer: When comparing growth rates between multiple time periods, Compound Annual Growth Rate (%) has been used. The Compound Annual Growth Rate (CAGR %) is a useful measure of growth over multiple time periods. It can be thought of as the growth rate that gets you from the initial value to the ending value.

As Census data (2006-2016) has exclusively been used for reporting historical data/trends in this study, this can be imagined as a Compounded *Census* Growth Rate, representing growth rates at five-year (5-yr%) increments. The same can be applied for future projections (TPA data), representing a forecasted growth rate each five years (5-yr%).

For more information, please reference: https://www.investopedia.com/terms/c/cagr.asp

Percentage Point (PP%) – represents the difference between two percentages. Percentage point is used to show the changes in an indicator with respect to its previous standings (e.g. between growth rates in 2016 and 2011);

Due to differences in methodology and the way data is captured, direct comparisons between absolute ABS historical data values (2006-2016) and TPA (Transport Performance and Analytics) forecasts (2021-2036) is strongly discouraged. It is recommended to use general trends and proportions when observing future trends and comparing across. There is also limited comparison for some indicators over Census periods due to changes in how ABS captures data;

Place of Usual (PUR) - some undercounting inevitably occurs for various reasons during Census count. Although adjustments are available for certain indicators in the form of Estimated Resident Population (ERP) these haven't been used in this report, in order to achieve consistency across all indicators;

Place of Work (POW) - ABS has introduced a new imputation method in 2016 for assigning workplace destination (Destination Zones) to persons that provided partial or no information about their place of work. The imputed data was excluded from this report, in order to achieve compatibility across previous Census years and 2016. As different imputations are applied to different geographies as well, LGA totals will not match sums of lower level geographies (e.g. SA2);

Broad Industry Category (BIC) - represents Greater Sydney Commission (GSC) broad categorisation of 1-digit ANZSIC industries;

Some discrepancies might be present in the Suburb level data, due to changes in ABS geographies between 2011 and 2016;

Totals derived from summing up suburb level data are slightly different to LGA totals due to ABS perturbations applied to protect the confidentiality of individuals;

This report has used a variety of measures in order to better understand trends present in the data from a number of perspectives. Observing indicators from only one perspective can



often be misleading. Each perspective (measure) tells a different story and gives a different outlook. This appendix is specifically devised to guide and assist you when analysing the data in this report and help you better understand the original intention of each measure.

Totals - Absolute Values (123)

northern beaches

council

Totals are the most common used measure for observing data. They are simple, easy to understand and point to straightforward facts. People love using them as they resonate strongly, especially when the numbers are high. For instance, based on the table below, we know we have a large number of people using *Vehicles* (88,789) to travel to work, hence we might end up with a lot of cars on the streets.

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	30,492	88,789	3,193	808	13,183
2011	24,432	81,467	3,043	628	12,240
2006	21,075	75,742	3,292	535	12,155
Growth (Total)	9,417	13,047	-99	273	1,028
Growth (CAGR %)	20.28%	8.27%	-1.52%	22.89%	4.14%

METHOD OF TRAVEL TO WORK (PUR) TOTALS AND GROWTH RATES (2006-2016)

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

<u>Downside</u>: When we have a lot of (similar) values, it might become hard to notice what to pay attention to. Also, understanding how one number (category) compares to other numbers (categories) or sum totals (of all categories) might become hard. Expressing data as a ratio or proportion (%) usually helps us with this.

Proportions - Percentage of SUM Total (%)

Proportions, ratios of percentages (name them as you like) usually kick-in handy when trying to understand how something compares to other (sub) categories or SUM totals. This measure is also particularly useful when trying to set up targets.

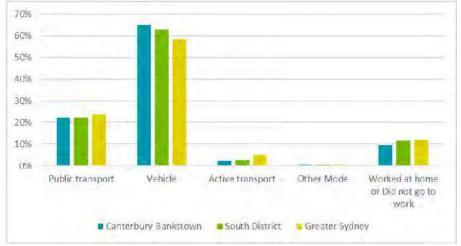
For instance, we can see that the value of *Vehicles* is quite different when comparing the local level of *Vehicle* usage (30,492) - table above; and the Metropolitan scale (x number of people use *Vehicles*). If someone asked us to put that in context and measure the RATE of *Vehicle* use, we couldn't really achieve it without using a relative measure. However, if expressed as a percentage of the sum total, we would know that the use of *Vehicles* is actually higher at the local level Metro level - see graph below.

Or, let's say our goal is to at least have 30% of people using Public Transport in the future. It makes much more "sense" to express that using proportions (%) than total numbers – e.g. our goal is to have 45,448 people using public transport. Also, the total might change, so 30% isn't 45,448 but a different value.





METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2016)



Source: ABS Census 2016 (TableBuilder Pro)

<u>Downside</u>: By using percentages or ratios, we can often oversight the overall importance of something in real life terms. Although 2.34% (ratio of people using *Active Transport*) might seem low and negligible, planning for 3,193 cyclists is still quite important. The larger the grand total is, the bigger the chance for such an oversight is to occur.

Growth Totals - Absolute Values (+- 123)

Again, similar to totals, growth totals are good for understanding the overall impact of some sort of change. From 2006 to 2016, the number of people using *Vehicles* has increased by +13,047 meaning we have a large number of additional vehicles on the streets that we need to plan for. Also, we have an additional +9,417 people using *Public Transport* probably requiring additional services.

<u>Downside</u>: However, growth totals can often "hide" important structural changes that occur over a larger period of time. If we disregarded *Active Transport*, we can see that all modes of transport have experienced a growth between 2006 and 2016. It is easy to jump to a conclusion and say the fastest growing mode of transport is *Vehicles*. However, if we compared the PROPORTION of people using *Vehicles* in 2006 to 2016, we will that the opposite is actually true - see next heading.

Proportional Changes - Point Percentages (%)

Proportional changes are good in anticipating broader structural changes. This means, that if the current growth trends continued, even though the growth total of *Public Transport* (+9,147) is lower than that of *Vehicles* (+13,047), the number of people using *Public Transport* would eventually "catch up" in the overall proportion. If we translated the first table to proportions instead of totals, it would look something like this:



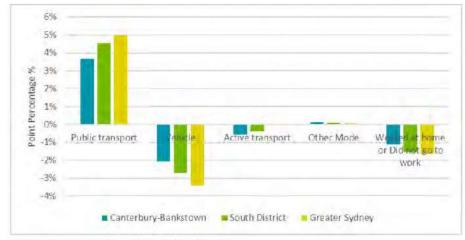


METHOD OF TRAVEL TO WORK (PUR) TOTALS AND GROWTH RATES (2006-2016)

Year	Public transport	Vehicle	Active transport	Other Mode	Worked at home or Did not go to work
2016	22.3%	65.1%	2.3%	0.6%	9.7%
2011	20.1%	66.9%	2.5%	0.5%	10.0%
2006	18.7%	67.1%	2.9%	0.5%	10.8%
Growth (Total)	9,417	13,047	-99	273	1,028
Growth (CAGR %)	20.28%	8.27%	-1.52%	22.89%	4.14%

Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

This is simply because the initial "base value" was a lot smaller for *Public Transport* compared to *Vehicles*.



CHANGE IN METHOD OF TRAVEL TO WORK (PUR) STRUCTURE (2006-2016)

Growth Percentages - CAGR (%)

Relative growth is a measure good for understanding how much a value has changed over time and relative to itself, as well as comparing rates and trends of different geographic scales. In relative terms, the +9,417 increase of people using *Public Transport* represents a +20.28% increase, while the +13,047 represent a +8.27% compared to a previous value of those indicators.

<u>Downside</u>: However, what relative growth numbers don't "catch" is the base value itself. If looked in more detail the +22.89% of the use in *Active Transport* is higher than both previously mentioned modes, but it only represents an additional +273 commuters.

Input-Output Modelling

While a cost-effective and widely used technique for economic impact analysis, I-O modelling has some limitations, as follows.

The model assumes relationships between industries are static over the forecast period. That is, productivity improvements are not factored in and historic relationships are assumed to hold.

The I-O model derives relationships between industries using total production estimates.
 Consequently, the relationships are 'average', whereas the stimulus used as an input is



Source: ABS Census 2006, 2011 and 2016 (TableBuilder Pro)

'marginal'. Such an approach does not account for any 'underutilised capacity' at the industry level or additional economies of scale that might ensue, as production expands from its existing base.

 The model assumes that there are no supply constraints. An additional drawback is that the model does not take into account the 'crowding out' of other sectors. This is recognition of the fact that there are scarce resources in an economy.

The combination of these limitations may lead to inflated economic impact results. Hence, the I-O model is generally considered a useful starting point only.

Note: There is a lot of other things to keep in mind when analysing data and using descriptive statistics to measure performance. Only a small part of it has been mentioned in this appendix. We recommend observing indicators from a variety of perspectives and angles prior to making any conclusions.





APPENDIX 3- GLOSSARY

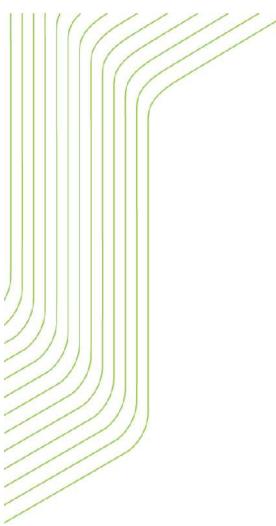
This appendix contains a glossary of commonly used acronyms and terms in the report.

ABS – Australian Bureau of Statistics ANZSIC - Australian and New Zealand Standard Industrial Classification ASCO - Australian Standard Classification of Occupations BIC - Broad Industry Category Broader Catchment - a collection of SA2s around a centre CAGR (%) - Compounded Annual Growth Rate District - North District DPE - Department of Planning and Environment GRSP - Greater Sydney Region Plan GS - Greater Sydney GSC - Greater Sydney Commission HR - Human Resource I-O - Input Output LEP - Local Environmental Plans LGA - Local Government Area LSPS - Local Strategic Planning Statement POW - Place of Work PP (%) - Point Percentage PUR - Place of Usual Residence SA2 - Statistical Areas Level 2 Subset- Refers to the categories of employment that go deeper than a BIC or 1-digit ANZIC, mostly referring but not limited to 4-digit ANZICs. TPA - Transport Performance and Analytics VET - Vocational Education and Training





ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019





Contact us

CANBERRA Level 2, 28-36 Ainslie Place Canberra ACT 2601 +61 2 6257 4525 sgsact@sgsep.com.au

HOBART PO Box 123 Franklin TAS 7113 +61 421 372 940 sgstas@sgsep.com.au

MELBOURNE

Level 14, 222 Exhibition St Melbourne VIC 3000 +61 3 8616 0331 sgsvic@sgsep.com.au

SYDNEY

209/50 Holt St Surry Hills NSW 2010 +61 2 8307 0121 sgsnsw@sgsep.com.au



Issue B - Job No 218999

SPORT + LEISURE

ETHOS URBAN

Northern Beaches Social Infrastructure Study September — 2019



N

Keproduction of this o Urban Pty Ltd.	Keproduction of this document or any part thereof is not permitted without prior written permission of Ethos Urban Pty Ltd.	ot permitted without p	rior written permission of Et
This document has been prepared by:	en prepared by:	This document has been reviewed by:	oeen reviewed by:
Danai Fadgyas	May 2019	Allison Heller	May 2019
Ethos Urban Pty Ltd operates under ISO 9001.2008. This report has been signed above, it is a preliminary draft	Ethos Urban Pty Ltd operates under a Quality Management System that has been certified as complying with ISO 90012008. This report has been prepared and reviewed in accordance with that system. If the report is not signed above, it is a preliminary draft.	ment System that has iewed in accordance wit	been certified as complying v th that system. If the report
VERSION NO.	DATE OF ISSUE	REVISION BY	Y APPROVED BY
1.0 (DRAFT)	May 2019	DF	AH
2.0 (FINAL)	June 2019	DF	AH
ETHOS URBAN		Ethos Urban Pty Ltd. www.ethosurban.com 173-185 sussex Street Sydnay NSM 2000 + 2412 oost, Aodo	i. m et Sydney

9409 4390

AHeller@ethosurban.com

Director

CONTACT Allison Heller

Prepared by © Ethos Urban Pty Ltd.

U)	
1	j	
١.,		
C	2	
d)	
1	J	
١.,	2	
C	2	
C	5	

Exec	Executive Summary	4
Intro	Introduction	1
1.1	Introduction	8
5	Northern Beaches Context	12
2.1	Community Profile	12
2.2	Future Community Profile	14
2.3	Key Social Plans, Policies and Strategies	15
2.4	Key Open Space and Recreational Plans, Policies	
	and Strategies	18
m	Social Infrastructure in the Northern	

Beaches

Social Infrastructure in the Northern Beaches	Open Space and Recreation in the
3.1	3.2

5.5 5.6

22

29

5.4

5.2 5.3

5.1 5.1

reation in the		
Open Space and Recreation in the	Northern Beaches	

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

Key Themes		
What We've Heard		34
Key Themes: Social Infrastructure	tructure	35
Key Themes: Open Space and Recreation	and Recreation	39
Emerging Planning Approaches to Open Space	aches to Open Space	
and Recreation		43
Issues, Challenges and Opportunities	d Opportunities	
Delivering on Strategic Drivers for Social	ivers for Social	
Sustainability in the Northern Beaches	iern Beaches	46
Supporting New Ways of Living and Working	-iving and Working	48
Revitalising the Existing Network of Social	etwork of Social	
Infrastructure		52
Delivering Inclusive, Flexible, Adaptable Spaces that Meet	le, Adaptable Spaces that	Meet
Community Needs		54
Exploring Innovative Models and Partnerships	ils and Partnerships	57
Next Steps		61
		5

4.2 4.4

4.1

4

Appendix A - Thematic Summary of Existing Plans and Policies

m



Northern Beaches Council plays a key role in providing social infrastructure to support and sustain liveability, community health, wellbeing, and participation. Social infrastructure can bring people together, provide spaces for people to connect, create and learn.

This Background Paper provides an overview of existing social infrastructure in the Northern Beaches that will inform the preparation of the Northern Beaches Social Infrastructure Study (SIS) and the Northern Beaches Local Strategic Planning Statement. The SIS will clearly articulate current social infrastructure supply and demand, with regard to current use patterns, accepted benchmarks for provision and best practice trends.

The Northern Beaches population is anticipated to grow by some 12% over the next 20 years. This represents a population increase of approximately 32,490 new residents across the LGA. Provision of high quality social infrastructure including community facilities, open space and recreation facilities, will be important to supporting community health and wellbeing outcomes.

There are a number of key challenges that will impact the future delivery of social infrastructure across the Northern Beaches over the coming years. For example, the LGA encompasses a large geographical area with very distinctive local communities who engage with different types of activities and uses depending on location and interests. Balancing the types and mixture of social infrastructure to cater for different expectations will remain an ongoing challenge in the future.

Furthermore, some of Council's existing community, sport and recreation facilities are isolated, located away from public transport and walkable catchments and are not accessible for all ages and abilities. Many facilities are also ageing and are not designed to support multipurpose activities or usage. Over the next 20 years, the rising cost of delivering social infrastructure will also continue to make the future delivery and upgrade of the existing social infrastructure network increasingly difficult amongst Council's many competing priorities.



Broadly, some of the key opportunities for social infrastructure identified in this Background Paper are as follows:

- Delivering on strategic drivers for social sustainability in the Northern Beaches;
- Supporting new ways of living and working;
- Evaluating the existing network of social infrastructure;
- Delivering flexible, adaptable spaces that meet changing community needs over time; and
- Exploring innovative models and partnerships for providing social infrastructure.

The next stage of the project will under take a community needs analysis involving an assessment of existing supply, demand and gaps for social infrastructure. This analysis will be presented in the forthcoming Social Infrastructure Study. The SIS will also deliver clear guidance on how social infrastructure may best be provided and managed to sustain liveability and community wellbeing in the Northern Beaches, now and into the future.

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper



ம





-0



1.0

NTRODUCTION

1.1.1 Overview

Northern Beaches Council plays a key role in providing social infrastructure to support and sustain liveability, community health, wellbeing and participation. Social infrastructure is the mix of facilities, places, spaces, programs, projects, services and networks that maintain and improve quality of life in a community. This Study focuses on "hard" social infrastructure, including community facilities, open space, sport and recreation facilities that can bring people together, provide spaces for people to connect, create and learn.

Community facilities provide an important touchpoint for Council to connect with the community through the delivery of amenity and services. Social infrastructure can be provided in many ways and can be in the form of a building, facility or space ('hard' infrastructure') or a program, activity or service ('soft' infrastructure).

This Background Paper provides an overview of existing social infrastructure in the Northern Beaches that will inform the preparation of the Northern Beaches Social Infrastructure Study (SIS), which will clearly articulate current social infrastructure supply and demand, with regard to current use patterns, accepted benchmarks for provision and best practice trends. It will identify current and future gaps in provision and provide

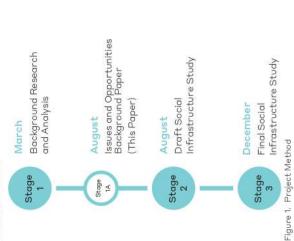
recommendations for existing and proposed Council facilities, as well as opportunities for innovative delivery models. The SIS will also deliver clear guidance on how social infrastructure may best be provided and managed to sustain liveability and community wellbeing in the Northern Beaches, now and into the future.

The key objectives of this project are to:

- Establish a baseline of existing social infrastructure, open space and recreation facilities and services, to understand the current social infrastructure context in the LGA and its links to the District and Region.
- Consider emerging trends shaping how social infrastructure is delivered and managed and what these trends mean for the Northern Beaches.
 - Identify the existing and future social infrastructure needs, taking into consideration future growth across the LGA, activity centres, and best-practice social infrastructure and open space provision practices.
- Identify priorities for the future provision of social infrastructure and the role of Council, other levels of government and non-government agencies responsible for delivery.

The SIS will also inform Council's forthcoming Local Strategic Planning Statement (LSPS), Local Housing Strategy, Open Space Strategy and Social Plan. It will also inform the harmonisation of Council's Local Environmental Plan (LEP), with regards to social infrastructure planning.

The Study will be broadly undertaken in three stages as shown below.



Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper



Introduction

1.1.2 Scope of the Study

Council provides a range of social infrastructure that supports active, engaged and healthy communities. Council as well as state government provides a range of regional, district and local social infrastructure that provides key community services. Types of social infrastructure are discussed in Section 3.

Alongside other Council assets it is also acknowledged that there are many other facilities that provide key community benefits to local residents both within and outside the Northern Beaches LGA. Some of these facilities are owned and operated by private and not for profit organisations, such as RSL clubs, surf life saving the olubs or religious organisations. When preparing the Draft SIS the location, distribution and availability of these facilities and services will be considered in the context of their relationship to the Northern Beaches' existing network of facilities.

1.1.3 Purpose of this Paper

This Background Paper will provide the basis for the preparation and further detailed assessment to be undertaken as part of the Draft SIS. It has been informed by desktop research and analysis, site visits and preliminary discussions with Council staff and other consultants (via an Inception Meeting held in March 2019, and a Technical Working Group Meeting held in April 2019).

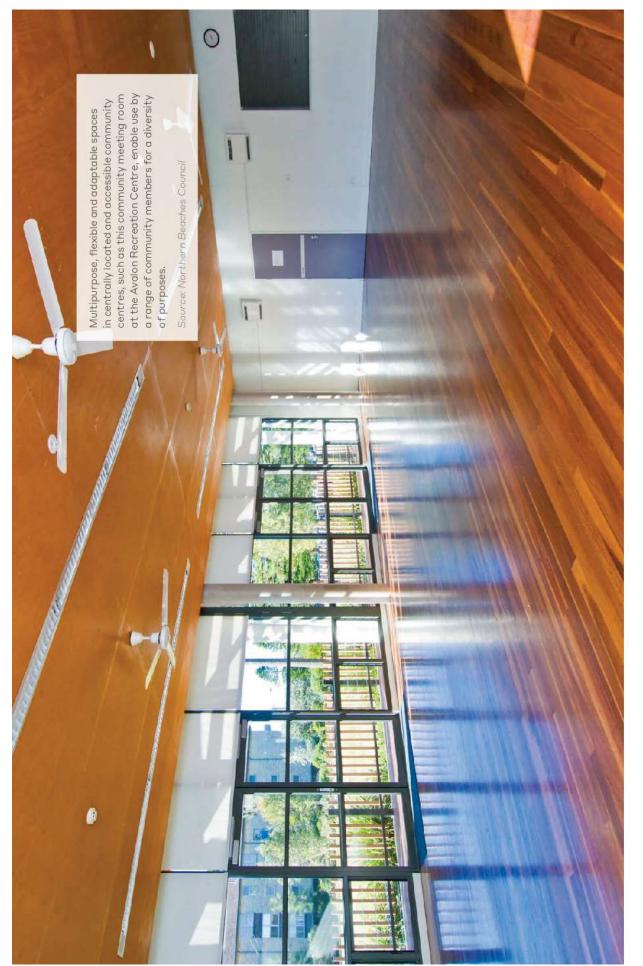
1.1.4 Approach

This Background Paper will:

- Describe and contextualise the Northern Beaches LGA's existing inventory of community facilities, open space and sport and recreation facilities;
- Provide a summary overview of the existing and future community profile and demographic context;
- Present preliminary findings of background research and analysis to date, incorporating preliminary feedback from Council staff and information from relevant strategies and plans and;
- Identify key issues, challenges and opportunities for social infrastructure in the Northern Beaches.

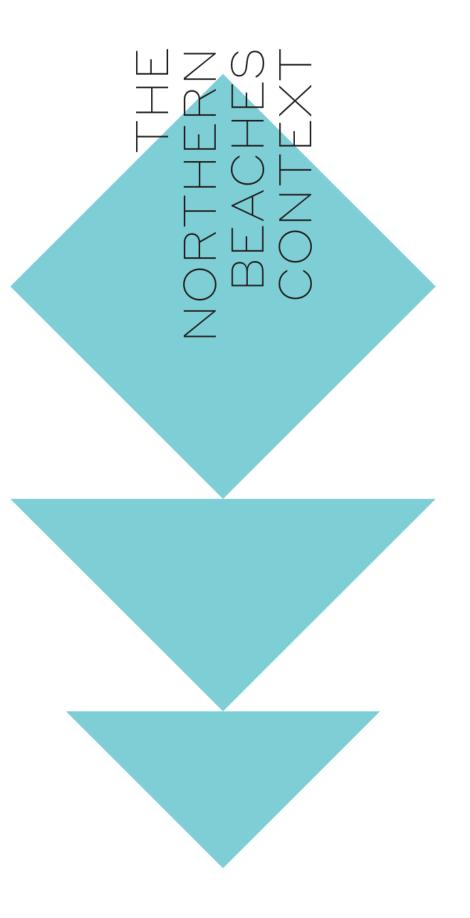
ö





Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper



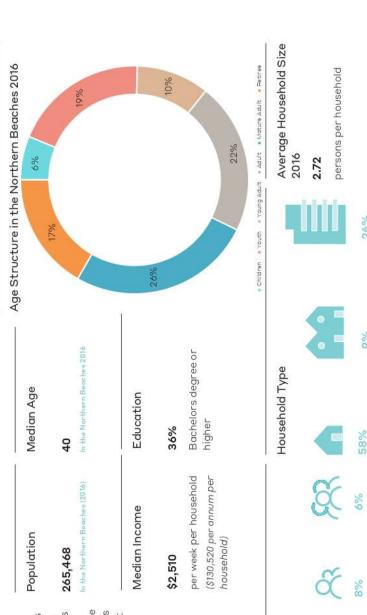






Paper, the key LGA demographics and statistics are summarised opposite. Emerging themes and trends Analysis of these patterns will inform future trends The Northern Beaches Community Profile provides will be further analysed as part of the development an indication of demographic trends and patterns. and needs. For the purposes of this Background of the Draft SIS.

Council has commissioned SGS Planning and demographic data for use in the Draft SIS. Economics to prepare a suite of baseline



Data Source:

12

By 2036, the population is projected to grow to 297,958 residents (based on TfNSW TZP16v1.5 POPD+PNPD). The population of Northern Beaches LGA in 2016 was 265,468 residents (based on ABS ERP). .

The forecast population charge variance is a second planning, July 2019.
 Northern Beaches Demographic Analysis, SGS Economics and Planning, July 2019.

The forecast population change between 2016 and 2036 is 32,940 residents.

Flat, Unit or Apartment

Detached Semi %6

Separate

House

households

Group

One parent

Couples without

Couples with

Lone person households

children

children

26%

38%

22%

Household Structure

families

26%

Ethnicity

The community of the Northern Beaches is predominantly from Australian and other Anglo backgrounds. The most multi-culturally diverse suburbs are Dee Why-North Curl Curl, Beacon Hill-Narraweena and Forestville-Killarney Heights. A summary of key statistics include:

- 48.24% of the resident population are of British ancestry;
- 20.73% of the resident population are of Australian ancestry;
- 15.40% of the resident population classified in the "other" category;
- 6.93% of resident population are of Irish ancestry;
- 4.63% of the resident population are of Southern European ancestry; and
 - 4.08% of the resident population are of Western European ancestry.

The suburbs of Manly-Fairlight, Dee Why-Curl Curl, Freshwater-Brookvale and Narraweena make up approximately 50% of the number of overseas migrants in the past five years.

- 11% of the resident population in Manly are overseas migrants;
- 8% of the resident population in Brookvale-Dee Why are overseas migrants;

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

- 5% of the resident population in Frenchs Forest S are overseas migrants; a
- 4% of the resident population in Mona Vale are overseas migrants;
- 4.1% of the resident population in Narraweena; and
- 3% of the resident population in Terrey Hills are overseas migrants.

Indigenous population

0.6% of the Northern Beaches resident population identified as Aboriginal and/or Torres Strait Islander descent. Key communities are located in the suburbs of Beacon Hill-Narraweena and Warriewood-Mona Vale.

Levels of advantage and disadvantage

The majority of the Northern Beaches LGA is relatively 'advantaged' when measured against a range of indicators however, there are some areas within the LGA which are home to less advantaged communities. Levels of advantage can be measured by SEIFA scores. Locations with the lowest SEIFA scores (most disadvantaged) across the Northern Beaches are:

- Narraweena; and
- Dee Why.

Suburbs with highest SEIFA scores (most advantated) include:

Balgowlah;

- Clontarf;
- Seaforth;
- Frenchs Forest; and
- Belrose.

Overall, the Northern Beaches LGA is within the highest SEIFA categories, as reflected in the high living standards, skilled population and overall opportunities available to residents.

Volunteering

In 2016 21.9% of the Northern Beaches resident population reported doing some form of voluntary work. The number of volunteers increased by 6,342 people between 2011 and 2016. Volunteering is an important aspect of communities that contributes to sustaining social connectedness and supporting programs and activities across the Northern Beaches network of facilities, spaces and recreational facilities.



<u>m</u>







Growth trends

Between 2016 and 2036, the Northern Beaches community is forecast to increase by 32,490 people, representing a total growth of 12.2%.

The future population of the Northern Beaches is projected to experience incremental growth over the next 20 years. This growth must be factored into future recommendations for social infrastructure, also considering relative concentrations of age structure and population density to provide accurate and useful recommendations. Growth provides opportunities to draw on rates-based models, developer contributions, planning agreements or partnership models, to fund new social infrastructure. However, such growth also requires careful consideration and planning to ensure that social infrastructure provision keeps up with population demands and expectations, both in terms of quantity, quality and type.

Changing household composition

Over the next 20 years, lone person households are expected to increase significantly.

Although the Northern Beaches LGA has a higher than average level of affluence and advantage when compared to other LGAs in Greater Sydney, issues of social isolation, loneliness and depression remain prevalent and relevant issues for consideration. In this context, social infrastructure will play a vital role in supporting social sustainability and connecting people with services, groups and activities that enable interaction and participation in daily life and foster social connectedness and social capital building. 37.3% of households across the Northern Beaches comprise of families with children. It is expected this trend will continue. Areas which are expected to consist of higher concentrations of families include Dee Why, Frenchs Forest and Manly.



Ageing population

Over the next 20 years, the number of older people will increase by 15,843 persons representing 37.5% growth.

In the context of the Northern Beaches, this is a notable shift in age structure. An active and engaged community leads to resilient and vibrant neighbourhoods, particularly amongst the older generations. As the population of the Northern Beaches ages, it will be important to ensure that social infrastructure facilities are accessible for people of all ages and abilities. Facilities that are unable to accommodate all users immediately create barriers to usage. Another consideration will be balancing the needs of older residents with the younger population to ensure that social infrastructure provision is multi-generational and enables equity of access. Opportunities for intergenerational interaction are also important to plan for through the co-location and function of facilities provided. Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper



northern beaches council

Cultural diversity

28.9% of residents in the Northern Beaches are born overseas and this trend is expected to continue. Social infrastructure, proximity to services and housing affordability are major determinates for residents when deciding where to live. Areas with higher concentrations of residents born overseas (proportionate to the Northern Beaches LGA) include: Brookvale (5.3%), Dee Why (4.8%) and Narraweena (4.1%).

It is important that social infrastructure is inclusive and accommodating to diverse cultural and language group communities. Flexibility of multipurpose venues can ensure greater opportunities for events, ceremonial, cultural or social activities specific to particular communities.



The North District 2.3.1

transformative change and investment over the next Beaches' future. Growth precincts and city-shaping the strategic framework for planning for Northern B-Line bus infrastructure, the Northern Beaches to Chatswood bus improvement and the Frenchs Forest Health and Education Precinct will deliver The North District Plan (refer to Figure 2) sets infrastructure such as the Northern Beaches 20 years.

which impact social infrastructure planning for the The plan sets out a number of high-level directives Northern Beaches. These are summarised as:

- increasing the use of public resources such as open Working together to grow a Greater Sydney: spaces and community facilities. .
- heart of planning: increasing walkable access to Celebrating diversity and putting people at the local centres.
- Designing places for people: increasing access to open spaces.

- Developing a more accessible and walkable city: Increasing the percentage of dwellings located within 30 minutes by public transport of a metropolitan centre/cluster.
- the urban tree canopy and expanding the Greater Valuing green spaces and landscape: increasing Sydney Green Grid.

Key implications arising for this study from the North District Plan are:

- Health and Education Precinct to ensure provision of social infrastructure that meets the needs of a The importance of planning for Frenchs Forest growing community. •
 - The regional importance of "great places" such as the beaches, Narrabeen Lake and Pittwater.
- Planning for older populations and for youth.
- The need to plan for future social infrastructure to be flexible, multipurpose, accessible and sustainable.
- Supporting and encouraging healthy active lifestyles •



LD LD



Community Strategic Plan Northern Beaches Shape 2028: 2018-2028 2.3.2

Plan establishes the vision, aspirations, goals and strategies for the Northern Beaches through to Shape 2028 is Council's overarching, long-term 2028 across a range of themes. It outlines the strategy for the Northern Beaches LGA. The following overarching vision:

554

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

To implement the vision, the Plan establishes a suite of key directions:

- Protection of the Environment;
- Environmental Sustainability;
 - Places for People;
- Community and Belonging; Vibrant Local Economy;
- Transport, Infrastructure and Connectivity; .
 - Good Governance; and
- Partnership and Participation.

The themes which are relevant to the development of the SIS are discussed further opposite.

Places for people

by high levels of community health and wellbeing. The accessible collection of communities characterised Northern Beaches aspires to be a welcoming, following goals are relevant to this Study:

- character of our villages and natural environment Goal 7: Our urban planning reflects the unique and is responsive to the evolving needs of our community.
- interaction, inclusion and support health and Goal 8: Our neighbourhoods inspire social wellbeing. •
- enjoys a broad range of creative, sporting and Goal 9: Our community is healthy, active and recreational opportunities •

and natural environments further supports individual Strengthening the bond between people, the built creating opportunities for community interaction and collective wellbeing. There is great value in within villages and centres.

collaboration in the development of open spaces and residents' quality of life. It encourages community centres which are vibrant, accessible and support The Plan outlines the need to create villages and neighbourhoods.

Community and belonging

culturally diverse LGA which achieves the following Northern Beaches will be a safe, supportive and goals:

- Goal 10: Our community is stimulated through a diverse range of cultural and creative activities and events.
- Goal 11: Our community feels safe and supported.
- Goal 12: Our community is friendly and supportive.

play a major role in supporting communities through that meet their needs and aspirations. This includes supporting sense of community and belonging. The provision of social infrastructure that supports the quality and provision of social infrastructure will the delivery of community facilities and services Social infrastructure plays a critical role in needs of volunteer and community groups.

Strait Islander culture and embracing the diversity recognising and celebrating Aboriginal and Torres The Plan also identifies the importance of of local neighbourhoods. Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

2.3.3 Draft Community Centres Strategy

In 2018 Council commissioned the development of a Community Centres Strategy to identify, assess and make recommendations for the future management and use of Council's 37 community centres over the next 20 years. The Draft Strategy will be reported to Council for public exhibition.

The Draft Strategy sets the following guiding principles for the provision of community centres:

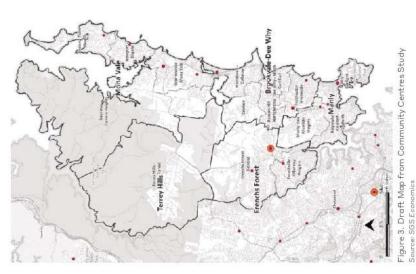
- Multi-purpose, flexible and available for a range of social, recreation, community and cultural services, activities and programs;
- Centrally located within strategic centres in visually prominent and accessible locations that are close to public transport;
- Co-located and integrated with other community uses and facilities;
- Designed to be welcoming and safe environments;
- Accessible and inclusive places that have universal access and cater for multiple users;
- Managed and planned through collaboration and shared use arrangements between Council and other agencies.
- Supported by good governance and centre management practices;
- Marketed to improve community awareness and

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

access to information;

- Designed in collaboration with the community; and
- Facilities that are planned for the future.
 Preliminary recommendations relevant to the Draft SIS include:
- Improve utilisation rates of existing centres;
- Maximise fair and equitable access to existing centres through discouraging exclusive use of community centres;
- Update the current Community Centre Policy;
- Investigate the potential for a Regional Community Centre within the Local Government Area;
- Increase the number of District/Sub-regional community centres to service the Northern Beaches;
- Develop a community centre marketing strategy; Creating inviting, accessible and welcoming
- community centres; and Investigate management models for non-Council
- managed and/or owned facilities to maximise floor space available to the community.

These recommendations will be taken into account in the development of the Northern Beaches Social Infrastructure Study.







2.4.1 Sportsgrounds and Golf Courses Background Paper

In 2017 Council undertook extensive investigations into likely future demand for sportsgrounds. Current projections indicate there will be a substantial undersupply of land for sport reaching a shortfall of more than 40 Ha by 2031. Council had more than 50,000 active playing members of sport in 2017 and had spent substantial sums in improving capacity of existing facilities.

Following the community review of issues and options for future provision- six key actions were developed, in order of Priority

- Allocate sports fields based on needs and participation growth basis;
- Improve the capacity and resilience of existing sports fields;
- Build new and upgrade existing sports fields in new housing development areas;
- Partner with schools to provide additional sports fields for the community;
- Install synthetic surfaces in some existing sports fields to enable greater use; and
- Convert suitable open space to sportsgrounds including some golf course land as needed.

2.4.2 Prior Open Space and Recreation Planning for Warringah (2015) and Pittwater (2014) Councils

A new Open Space and Recreation Strategy will be prepared in 2019. Prior plans identified that the Northern Beaches was well supplied with regional open space, national parks and state reserves. The extensive foreshore areas, waterways and beaches provide a substantial part of the open space and recreation infrastructure for the LGA and these assets need to be protected and valued.

Key directions identified included:

- Improving equity in access to open space and park based recreation opportunities;
- Investing in and adding value to existing public open space assets;
- Providing multi-use spaces for intergenerational use and increase opportunities for an ageing population, children and young people;
 Recognising the increasing importance of trail and path networks as core
 - recognising the increasing importance of train path hetworks as core recreation infrastructure;
- Investigating use of golf course land for other sport and active recreation outcomes;
- Need to increase supply of sporting land and plan for expansion of indoor sport facilities and provision of new facilities;
- Continued rationalisation of the open space estate to maximise environmental and recreation benefits; and
- Recognising shifting participation preferences such as increased outdoor recreation, fitness related activities and endurance sports.

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper



Key Open Space and Recreational Plans, Policies and Strategies

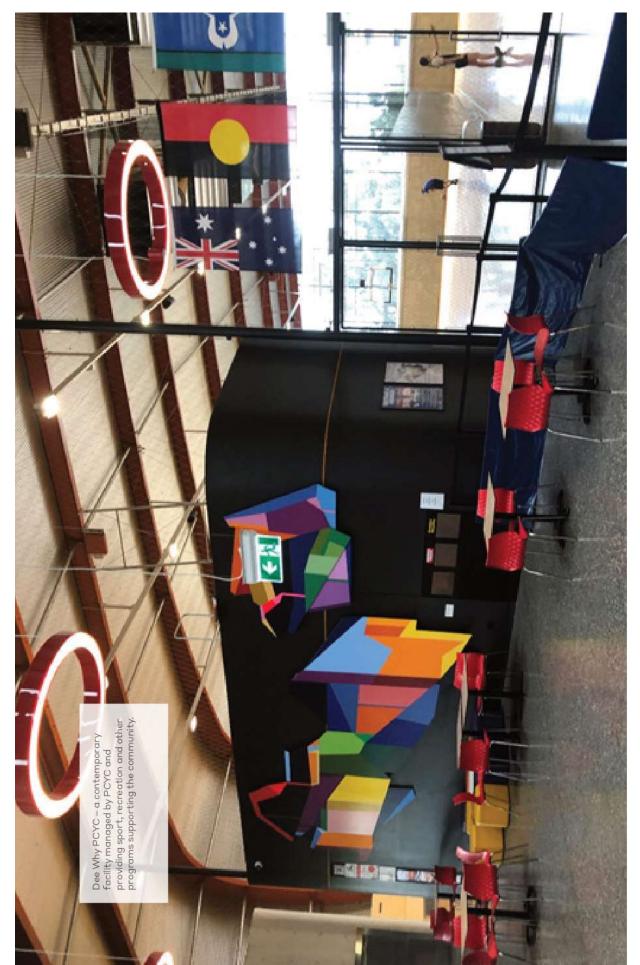
2.4.3 Frenchs Forest Social Infrastructure Planning – Open Space and Recreation Provision

The Frenchs Forest Hospital Precinct will be a new Planned Precinct based around the newly completed Northern Beaches Hospital.

The Precinct is expected to add an additional 4,360 dwellings and 2,300 jobs over the next 20 years. An additional 2000 jobs will also be generated by the new hospital. A key part of the development is the creation of a new town centre on the grounds of the existing Forest High School, and relocation of the school to Aquatic Reserve.

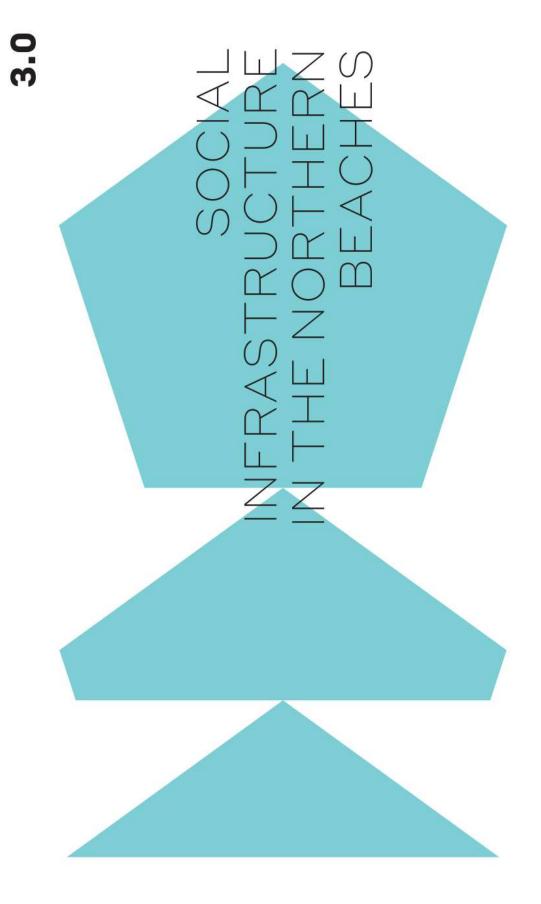
Meeting the future needs of these residents will require a mix of new parks and open space; improvements and upgrades of existing sporting areas; new built facilities in the town centre and better active transport opportunities to connect residents to open space, sport and recreation spaces and places.





Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper







3.1.1 Existing Social Infrastructure

There is a variety of social infrastructure distributed across the Northern Beaches which provides a range of facilities, services, programs and activities.

Many of these facilities include community spaces which are available for hire. Some social infrastructure is provided by the State government or other government agencies, such as hospitals, schools and emergency services. This type of social infrastructure is typically classified as 'regional' or 'district' level. Other social types of social infrastructure is provided by Council - these primarily include smaller local level infrastructure that support the day-to-day needs of residents. Social infrastructure can also be provided by private organisations including schools, aged care, shopping centres and healthoare services. When assessing the supply and demand of existing social infrastructure, established benchmarks can be applied to regional, local and district facilities. The Draft SIS will clearly set out the types of social infrastructure that will be assessed and the relevant benchmarking standards.

The maps on the following pages show the different types of regional, district and local infrastructure organised by the following themes:

"A recent Council resolution establishes 'new community service hubs' in existing Council owned or managed facilities. The first hub will be lacated in Ragion Street, Maniy with others to follow in Dee Why, Mana Vale and Franchs for est as opportunities become available. They will also hubs will period and programming space for not for profit community organisations (who are predominantly State and Federally funded). They will also provide office and services to the most vulnerable members of the Northern Beaches community including homeless persons, migrants, victims of domestic violatere and youth services to the most vulnerable members of the Northern Beaches community including homeless persons, migrants, victims of domestic violatere and youth

- Health;
- Education;
- Local Community Facilities; and
 - Other Community Facilities.

22

Types of Social Infrastructure

Regional

- Hospitals
- Higher education (universities/TAFEs)
- Major cultural and civic facilities such as function centres, exhibition spaces or performing arts centres

District

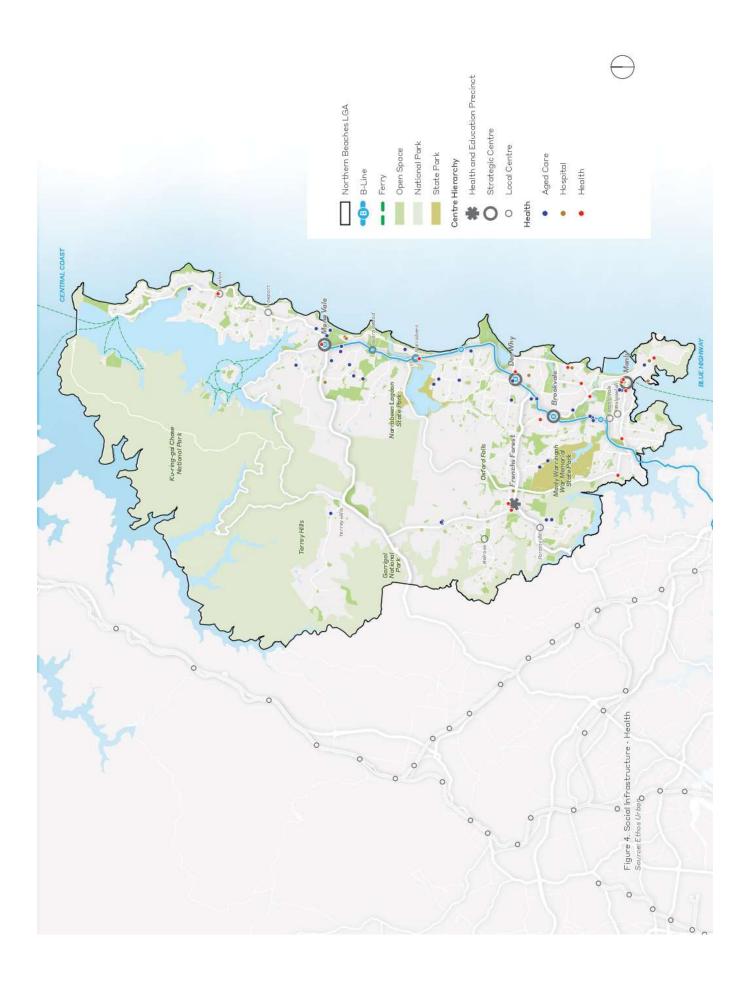
- Medical and health centres
- Secondary schools
 District libraries
- District libraries
 Emergency services (police, fire, ambulance and
 - SES services)District open space
- Community facility (min 1,000 sqm GFA)

Local

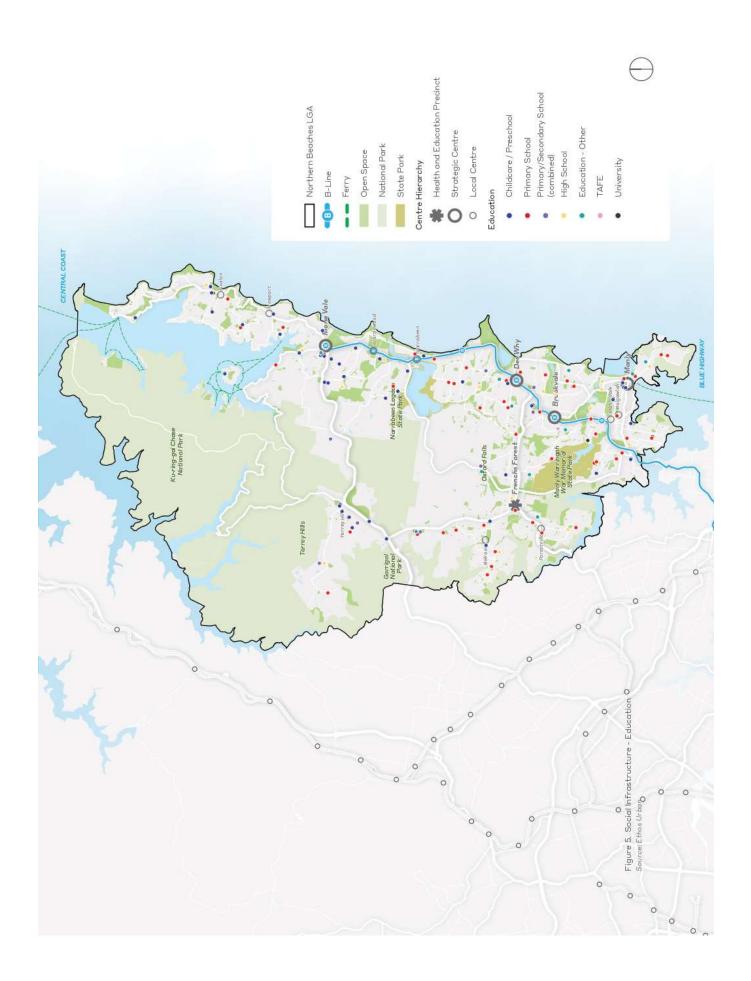
- Integrated multipurpose facilities
- Libraries
- Local community facilities (min 150sqm GFA)
- Child care centres & preschools
- Cultural and creative spaces
- Club houses, including surf life saving clubs
 - Beach and ocean pool club houses
- Environment education centres
- Aged care facilities
- Community gardens
- Men's sheds
- Places of worship
- Community service hubs*

ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

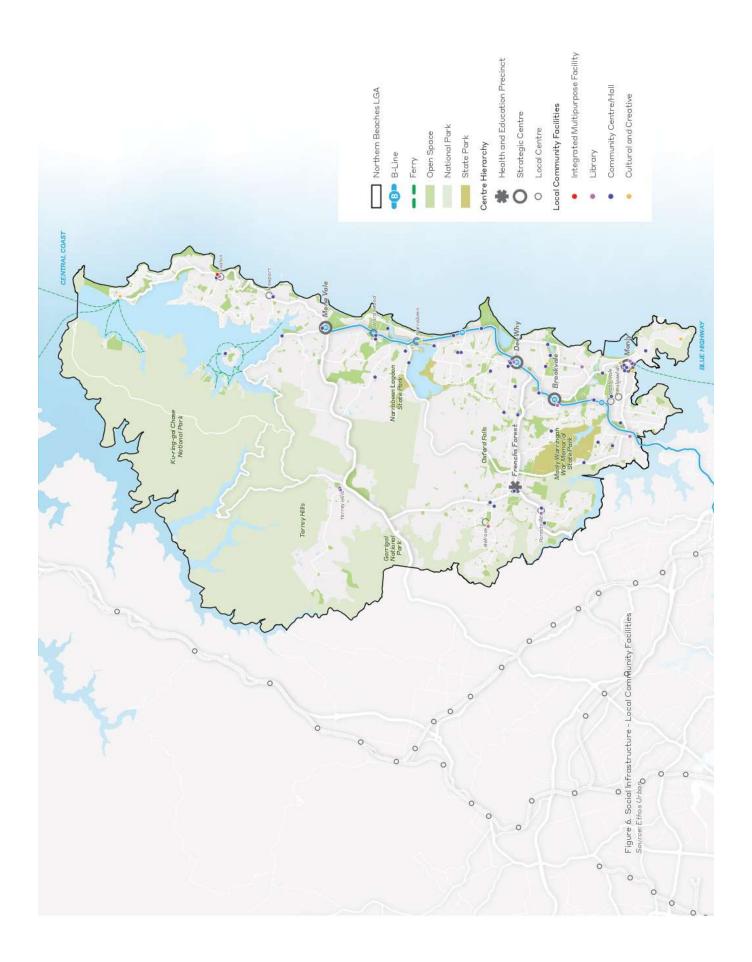




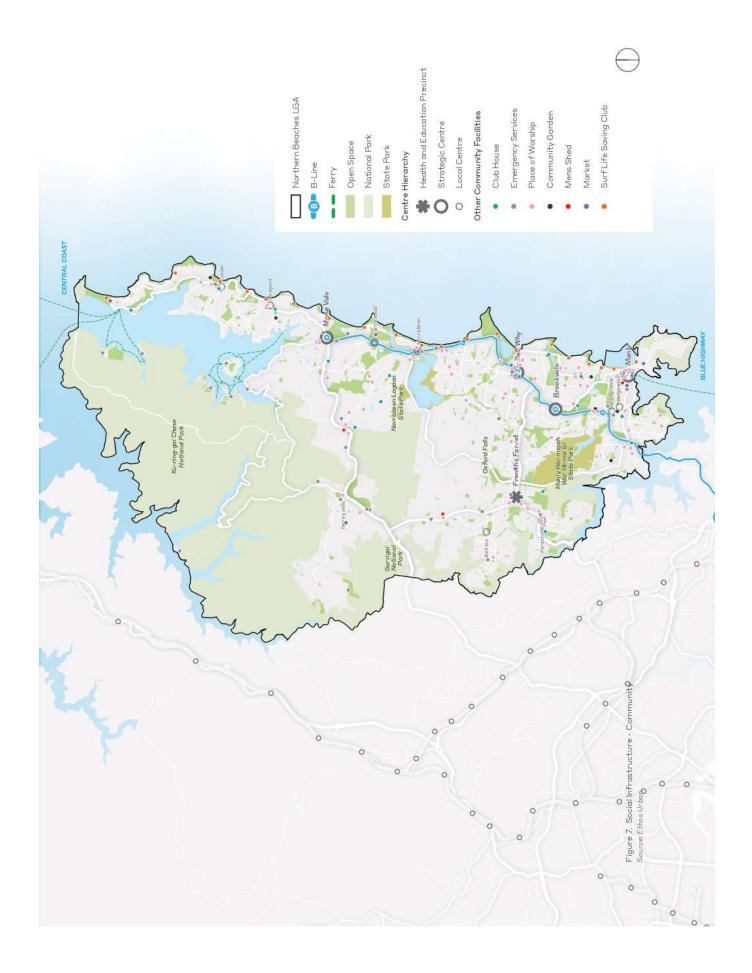












Types of Social Infrastructure in the Northern Beaches

Integrated Multipurpose Facility

Avalon Recreation Centre

Avalon Recreation Centre is located next to Dunbar Park. It is an excellent example of an integrated multipurpose facility as it provides a series of adaptable programming spaces. The centre includes a sports hall, meeting room, kitchenettes and four activity rooms for hire (including one with sinks for art classes). The spaces make up a centre which is suitable for functions, classes, meetings, sports, workshops and exhibitions. The Recreation Centre is also home to the Avalon Community Library, the Avalon Early Childhood Centre, the Avalon Youth Hub and a Council Customer Service Centre.

Source: Northern Beaches Countil

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

Local Community Facility

Mona Vale Memorial Hall

Situated within the Village Park in Mona Vale, the Memorial Hall is an example of a local community facility as it is predominately single use space with no space for casual social interaction.

The Memorial Hall is fully accessible and suitable for functions, classes, meetings, workshops and exhibitions featuring a large main hall (stage included) and Wi-Fl access. Parking is also provided in the adjacent car park.

Library

The Glen Street Library forms part of a cultural hub, located adjacent to Glen Street Theatre in Belrose. The facility is an example of a district library facility providing a significant resource collection of books and media, IT facilities as well as spaces for social interaction and reading.

The library provides seven computers, two children's computers, a family history research computer, free Wi-Fi and affordable printing facilities. Two meeting rooms and a multi-use function space (seating up to 30 people) is available for hire.











Child Care Centre/Preschool

Belrose Children's Centre

The Belrose Children's Centre is one of Council's long-day child care centres. It has a capacity for 78 children, and cares for children aged six weeks to six years. The centre operates under the National Quality Framework and Regulations, and follows the Australian Government's Early Years Learning Framework to guide the children's development.

The Centre is co-located with the Belrose Community Centre, and is located within the south of Belrose, adjoining the suburb of Frenchs Forest.

Cultural and Creative Space

Tramshed Arts and Community Centre

The Tramshed Arts and Community Centre is an example of a cultural and creative facility which offers a range of spaces for creative enterprise and community members. The facility is newly renovated with views of Narrabeen Lagoon, located near Berry Reserve. It includes three halls (with capacities of 100, 100 and 125), two meetings rooms (with capacities of 10 and 6) and a pottery room (featuring a slab roller, three kilns and ten wheels).



Other

Fresh Water Surf Life Saving Club

Given the Northern Beaches LGA's coastal location, Surf Life Saving Clubs are an important part of the social infrastructure, providing essential support to those who visit the beaches. The Freshwater Surf Life Saving Club is located on Freshwater Beach. Not only does it serve the community with surf lifesaving club patrols but also hires out four function rooms which cater to a range of activities and events.





Open Space and Recreation in the Northern Beaches 3.2

3.2.1 Existing Provision

The current open space and recreation Infrastructure in Northern Beaches includes:

- 244.87 hectares of sporting open space (includes all POS with a primary use for sport);
- 141.08 hectares of urban parks;
- 171.83 hectares urban parks with natural areas;
- 726.62 hectares of natural areas;
- 1317.81 hectares of foreshore and ocean beaches; and
- 11,368 hectares of national parks;

Existing provision by type of facility includes:

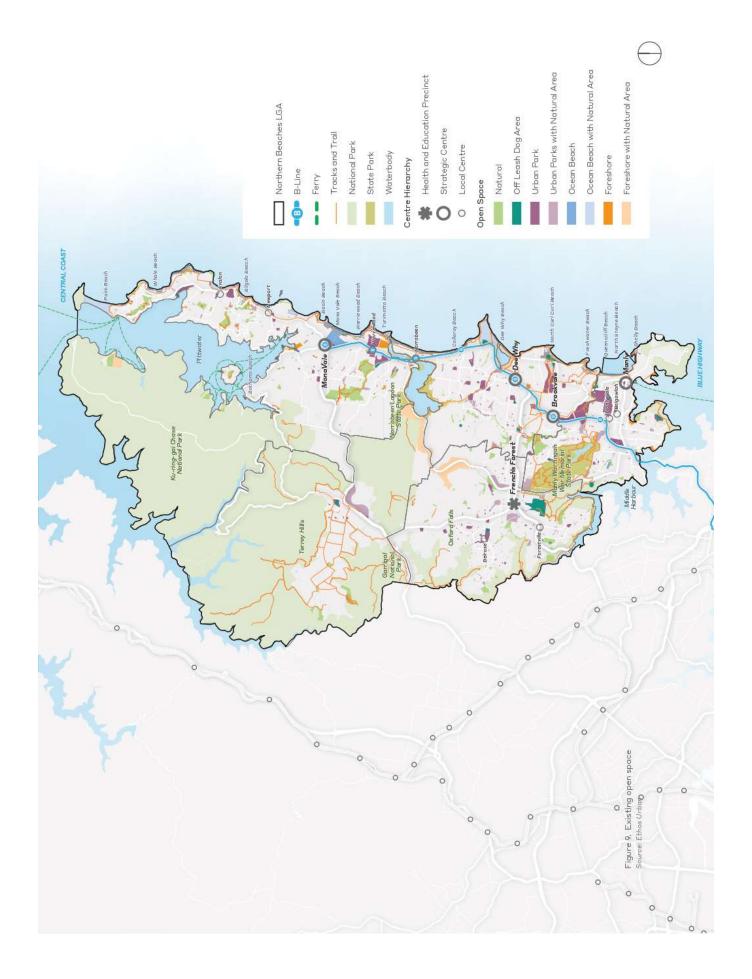
- Golf courses covering 453 hectares catering for over 10,000 members – including 7 golf courses on 180 Ha of public land;
- Aquatic Centres (only 2 council owned), swimming enclosures and rock pools;
- Netball and tennis court complexes;
- Indoor sport centres;
- Outdoor courts for recreation;
- Skateparks;
- Dog parks (off-leash areas);
- Playgrounds and outdoor exercise equipment;
- Bowling greens;
- Recreation tracks and trails (walking and cycling); and
- Picnic areas.

Refer to Figures 9 and 10 for a map of existing provision.

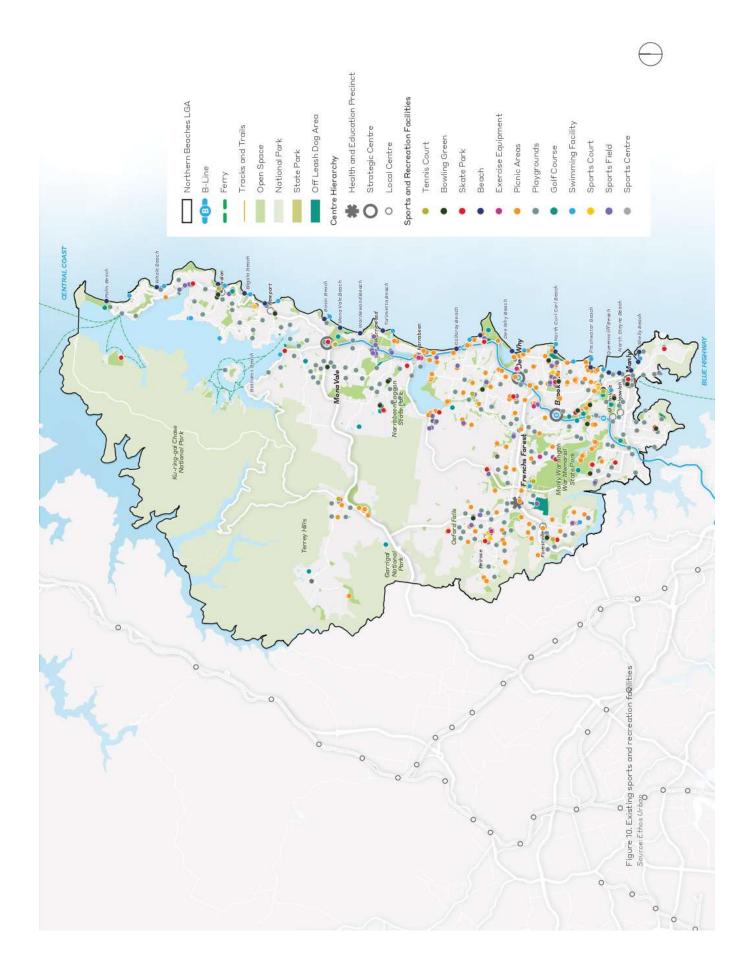
Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper













Open Space and Recreation in the Northern Beaches

		1. 121 - 12	
Sporting Fields	Indoor Sport Centres	Youth Facilities	Aquatic Facilities
Lionel Watts Reserve, Frenchs Forest	Northern Beaches Indoor Sports Centre , Warriewood	Mona Vale Skate Park	Andrew Boy Charlton Aquatic Centre, Manly
Multiple use sporting		Activating public open	Aquatic facilities support
precincts support a	Large multi-use centres	space with facilities	community recreation,
range of sports and	provide for a diverse	designed for young	sport and fitness.
provide recreation	range of uses and are	people meets a key need	Large centres like this
opportunities for	most successful when	for no cost recreation	are supported by the
surrounding residents.	located to be highly	and legitimate spaces	rockpools, enclosures
The ability to share	accessible to a range	for youth to socialise and	and beaches to provide
access and other	of users. Built in 2001,	be active. Skateparks	multiple opportunities fo
infrastructure makes	NBISC features 6 full	and outdoor courts are	aquatic activity.
them more efficient .	sized basketball/netball	popular approaches but	
A master plan is	courts and 7 Volleyball	new facilities such as	
underway for this	Courts spread across	parkour and bouldering	
reserve.	two sports halls (East & West).	walls are also emerging.	
	A PARK A	「「「「」	
	1 - Charles and a start	「「「「「「」」」	
and			
Contract of the			
AND NAME OF A DESCRIPTION OF A DESCRIPTI	0		
H - W -		the second	A DESCRIPTION OF A DESC
		Not and the second	

these spaces requires the provision of a diversity of

pathways and of course

access to beaches and

public amenities.

opportunities including

nities for

play, picnic facilities,

serviced by 69 foreshore

parklands. Activating

extensive coastal areas

Beaches lifestyle with

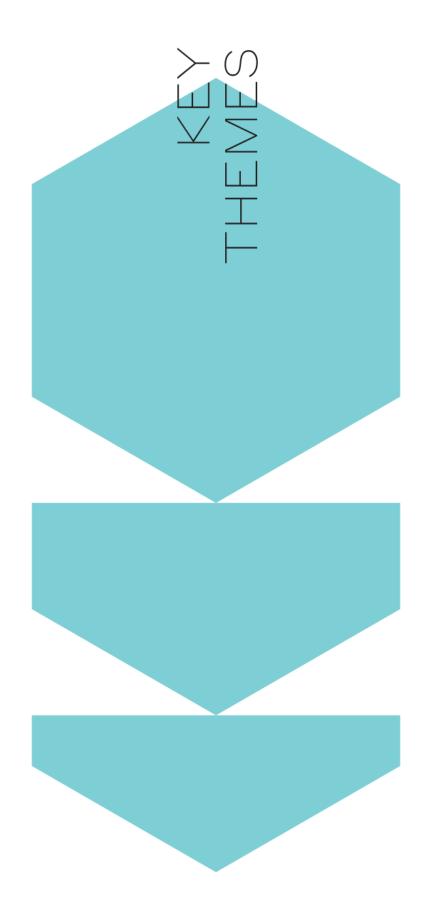
Bert Payne Park, Newport

Public Parks

Foreshore parklands are integral to the Northern

support





4.1.1 Engagement with Council Staff

The development of this Background Paper has been informed by two meetings/workshops with Council as follows:

- Inception meeting: involving a Council Staff knowledge sharing session (held in March)
- Collaborative consultant workshop: to discuss LSPS priorities and share preliminary findings with various consultant groups (held in April)

At each of these meetings, a range of representatives provided feedback and input across various Council departments including strategic planning, environment, property and community services.

A summary of the key issues and opportunities identified across the two sessions are provided below.

Issues and Challenges

- There is no existing or comprehensive LGA- wide Social Infrastructure Study to support Council's decision making.
- Differing approaches (historically) to provision of social infrastructure types across the former three LGAs which have been integrated to form Northern Beaches Council. This has left a legacy of buildings and spaces that are not connected by strategic planning frameworks.

- Competing demands across different communities for open space and social infrastructure.
- Perceptions of socio-spatial divide between the 'north' and the 'south' of the LGA.
- Differences in types of usage and expectations for provision of social infrastructure between coastal and inland communities.
- Housing and land prices in many areas across the LGA are higher than average, particularly in waterfront locations. This makes provision of new infrastructure challenging.
- High dependency on motor vehicles and accessibility challenges with the existing public transport network.
- Lack of connectivity and accessibility between the foreshore areas and western portions of the LGA.
- Large and diverse geographical area with many different communities, residential settings and population densities.
- High levels of employment self-containement across the LGA, increasing pressure on social infrastructure.
- Many streams of concurrent studies and strategies are presently being prepared. Integration and alignment between these studies will be required at a strategic level.

Opportunities

- Delivery of new and renewed social infrastructure to support growth and change across the LGA.
- Integration of social infrastructure provision with Council's strategic priorities for innovation, technology and digital connectivity.
- Delivery of innovative and efficient resource use (energy, water and waste) and work towards net zero emissions by 2050.
- Delivery of the new Frenchs Forest community as a low carbon, high efficiency precinct.
- Creating community hubs to cater for a range of services, adapting to the changing needs of an evolving population.
- Integration and activation of surf lifesaving clubs within the broader network and recognition of the important role they play in the community.
- Opportunities for greater connection between east and west of the LGA, providing residents greater access to Macquarie Park and Chatswood. Especially relevant when high number of commuters travel daily to Macquarie Park, Ryde and Parramatta for work.
- Growth and renewal of Brookvale as an enterprise hub offering residents opportunities to live and work within the area.
- Potential to influence other plans currently being prepared by Council, for example Council's Destination Management Plan.

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper



4.2.1 Location and Distribution

A summary of some of the initial observations prior to the comprehensive supply and demand analysis has identified the following:

- General patterns of spatial distribution across the LGA reveal that the majority of social infrastructure is located along coastal settlements and within the south-eastern suburbs.
- There is a lack of social infrastructure provision in Frenchs Forest. The nearest local community facilities (other than Yoyo's Forest Youth Centre) are provided in the satellite suburbs of Belrose, Forestville, and Allambie Heights.
- The geographical and spatial layout of Frenchs Forest is largely segregated by large arterial roads (e.g. Warringah Road and Forest Way) and anchored by the Forestway Shopping Centre and the Northern Beaches Hospital. This makes accessibility and walkability challenging.
- The south east of the LGA has the highest concentration of social infrastructure within the Northern Beaches LGA. For example, Manly has a high concentration of facilities within an 800m catchment from the town centre however there is currently no integrated multipurpose facility. This is the highest density than any other centre within the LGA.

Manly's connectivity to Sydney CBD via the 'Blue Highway' also makes it a popular place to visit and work. This places increasing demand on social infrastructure.

•

- In coastal villages, facilities generally tend to be clustered around local centres. There is a much stronger correlation of facilities located in proximity to local centres in the coastal villages, when compared to the facilities located in the inland and bushland suburbs of the LGA where facilities are more dispersed.
- In Dee Why, social infrastructure is generally clustered around the Council Municipal Chambers to the north of the B-Line stop and the main town centre.
- Located in geographical proximity, residents of each centre have access to a broader range of services and facilities than town centres which are more isolated for example Terrey Hills.
- Some local centres such as Terrey Hills are isolated from district level services. Access to higher order social infrastructure, requires residents to drive to larger town centres.
- There are also a number of other isolated communities nestled in the Ku-Ring-Gai Chase National Park. All these communities are almost solely accessed by boat and have no provision of social infrastructure (except for Scotland Island,

which has a community centre and kindergarten).

- There is a wide variety of facilities available in the town centres of Warriewood and Narrabeen. Given the close proximity of each centre, these facilities would be accessed and used by the residents of both centres (and the surrounding areas).
- Social infrastructure in Narrabeen and Warriewood represents a good example of 'clustered' distribution.

.

- Avalon, Newport, and Mona Vale are the three primary town centres of the northern portion of the LGA. Whilst geographically proximate, these towns each have quite distinct communities and have different needs. It should not be assumed future needs are the same.
- A conceptual density analysis of existing facilities across Council's strategic centres reveals a number of interesting patterns, as summarised in Figure 11.

As part of the development of the SIS, a detailed catchment-by-catchment analysis will be undertaken in accordance with the social infrastructure typologies outlined in Chapter 3. This will further evaluate the distribution of social infrastructure and the diversity of facilities within each planning cotchment.

4.2.2 Accessibility and Connectivity

'Accessibility' can have different meanings to different people and used in many contexts. In reference to Social Infrastructure, this Paper acknowledges the following interpretations:

- Physical accessibility: Ensuring that social infrastructure is able to be accessed and used by all members of the community - people of all ages and abilities (e.g universal design).
- Locational accessibility: Ensuring that social infrastructure is provided in locations which are easily accessible by walking, cycling, public transport, and (if required) private vehicle. Social infrastructure is best located in areas which people are drawn to and are frequently accessing, such as town centres.
- Geographical connectivity: Refers to broader strategic networks to ensure that facilities are appropriately connected to each other, to provide a strong, cohesive network of social infrastructure across the LGA.
- Technological connectivity: This refers to the importance of facilities providing appropriate technology to support and enhance their use, and can include WiFI, computers, projectors, and other more specialised technologies (as required)

 The following observations in relation to accessibility
 and connectivity of Northern Beaches existing social infrastructure network are outlined below:

- The Northern Beaches is a highly car dependent LGA. Within each community and town centre, there should be a range of local social infrastructure that is within walking distance.
- The B-Line is the only high frequency public transport connection 'in and out' of the Northern Beaches. There is some correlation between B-Line stops and provision of social infrastructure however there are also further opportunities to explore co-location of future social infrastructure adjacent to or integrated into new proposed B-Line stops (i.e. between Dee Why to Chatswood and Mona Vale to Macquarie Park).
- Review of relevant strategies and plans indicates that many of Council's facilities are not fully accessible or compliant with relevant legislative requirements. Ensuring that social infrastructure is accessible for people of all ages and abilities should be a key priority for Council.
- Contemporary models of social infrastructure provision are exploring ways to re-invigorate existing social infrastructure through provision of free wi-fi, PA and audiovisual facilities and other modes of digital connectivity.

- Currently in Manly there are no multipurpose community facilities. This is a major gap identified in the Draft Community Centres Strategy.
- The Community Centres Strategy also identifies a significant gap in the provision of community centre floor space in Dee Why in relation to the dense population. The only community centre space is the Police Citizens Youth Club (PCYC) facility which is suited to a particular demographic use.

The forthcoming draft SIS will provide a qualitative assessment of the accessibility in relation to these considerations.





37

Key Themes: Social Infrastructure

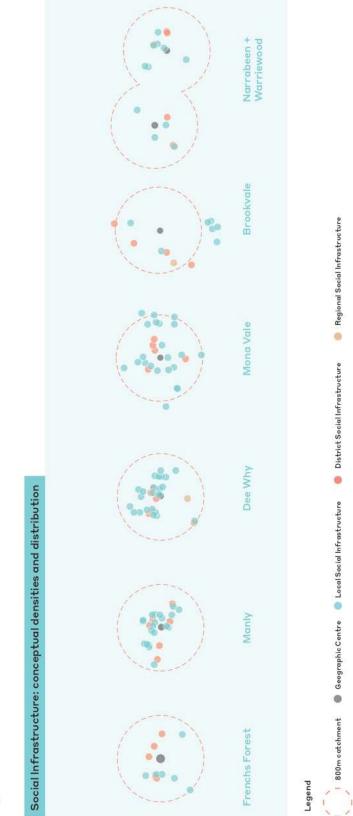


Figure 11. Examples of distribution of social infrastructure in key centers Source: Ethos Urban

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

4.2.3 Quality and Condition

social infrastructure of varying ages and condition. present opportunities for refurbishment to enable them to cater for wider sectors of the community. The Northern Beaches contains a wide range of Newer facilities move toward more integrated, Older facilities tend to be more single-use, and multi-use provision for example the Avalon Recreation Centre.

Other recently opened facilities include:

- Tramshed Arts and Community Centre (re-opened after refurbishment); and •
- PCYC Northern Beaches centre at Dee Why (new build).

TAP Consulting, include YOYO's Forest Youth Centre the draft Community Centres Strategy prepared by at Frenchs Forest, and the Mona Vale Memorial Hall. community. Examples of this have been identified in Overall however, Council has a large proportion of facilities that are ageing, and are either in need of repair and maintenance works, or are dated and do not meet the current and future needs of the

As part of the draft SIS, we will be working with Council to undertake a high-level assessment of the existing condition of all relevant social Infrastructure

4.2.4 Usage, Utilisation and Capacity

exercise groups, drama & dance groups, choirs, and Social infrastructure is used for a wide variety of sports, gatherings, classes, activities, and events, ranging from playgroups to language classes, painting & pottery classes.

becoming 'victims of their own success', such as the recently opened PCYC at Dee Why, which has been the LGA. Some are highly utilised, with some even The utilisation of facilities varies greatly across so popular that it has reached capacity.

are not sufficiently meeting the needs of the present community. Such facilities present opportunities for maintenance, or age, have lower utilisation, as they renovation and revitalisation to ensure they meet the needs of current and future communities. Others, potentially due to location, level of

Community facilities for hire are an important part of the social infrastructure network. Council has 37 facilities and spaces which are available for hire by the community. Different types of users include:

children's parties, or local organisations hiring a Casual hirers: include parents hiring venues for facility for a single event. •

regularly use fields for training and matches, and traders or small businesses who operate classes (such as art or language classes) out of Council Regular hirers: parent-run playgroups, sole facilities, local sporting organisations who many more. .

managed by other organisations, an example being which is run by the Police and Citizens Youth Club the PCYC Northern Beaches facility at Dee Why, Some Council facilities are exclusively used and (PCYC NSW).

existing users will be incorporated into the analysis undertaken as part of the Draft SIS, to ensure that Each user group has different needs, expectations, recommendations meet the diverse needs of the approaches, and perspectives in relation to their use of social infrastructure. A consideration of community at present and into the future.

4.3.1 Developing an Open Space and Recreation Strategy

Council is about to commence the preparation of a detailed Open Space and Recreation Strategy. This will need to ensure that the analysis of existing public open space takes into account of:

- The purpose and function of individual public open space areas, particularly:
- where can secondary uses contribute to recreation outcomes;
- how the overall green space network contributes to urban greening; and
- the intended purpose of parks and sporting areas and their effectiveness in meeting that purpose.
- Opportunities to rationalise the estate to allow for reinvestment to improve capacity of functional parks and sporting areas.
- Distribution of and access to key opportunities supporting sport, active recreation, outdoor recreation and coastal and waterside areas.

The development of the strategy will need to consider:

- The latest planning guidance from NSW government including the Open Space for Recreation Guide (GANSW- Draft) and improving local access to public open space opportunities.
- Areas of under provision affecting current residents and the strategies for addressing this.
- Planning for growth around the planned precincts, growth areas and areas of urban intensification, particularly:
- ensuring there are new supplies of land for sport and organised recreation;
- adopting place based planning and ensuring great public open space areas support growth; and
- ensuring that new or upgraded and expanded parks have the size and capacity to accommodate growth.
- the importance of paths and trails in activating linear open space; connecting people to parks and providing for active recreation.

4.3.2 Future Population Growth and Changing Participation Trends

Open Space and Recreation infrastructure is integral to the social, physical and environmental health of communities. Activity participation trends should be considered with regard to demographic changes, especially the context of an ageing population in the LGA. The most recent indications from the Ausplay Survey 2018 shows that of the top 15 activities for residents in NSW the following participation levels were recorded in **Table 1.**

The findings of this analysis includes the following:

- Walking is six and a half times higher than the highest field sport (soccer);
- Of the top 15 activities, there is a clear trend for more individual-based activity and fitness and exercise related activities; and
- Swimming is still a high participation activity.



The key observations from the report (Ausplay Survey 2018) include:

- City and rural residents had a higher participation rate in physical activity (41% for 3 times a week) compared to remote. •
- Part-time workers and retired persons had the highest percentage of participation in physical exercise at 3 times a week or more. •
- The higher the household income the higher the rate of participation. •
- 45 plus females participate more in gym /fitness than formal sports •
- For children, organised participation outside school •
 - hrs. by age indicated:
 - 5-8 Y.O. 90% ij.
 - 9-11 Y.O. 95% ï
- 12-14 Y.O -92% i.

For children (up to 15 years) participation in the top 10 is outlined in Table 2

Activity	% of population
Walking (Recreational)	43.6%
Fitness/Gym	35.1%
Swimming	16.6%
Athletics, track and field (includes jogging and running)	15.1%
Cycling	10.0%
Football/soccer	6.8%
Bush walking	5.5%
Tennis	5.1%
Хода	5.0%
Golf	4.8%
Surfing	3.6%
Pilates	2.7%
Cricket	2.7%
Basketball	2.6%
Touch football	2.3%

Table 1 – Top 15 sport and recreation activities for residents in NSW

Activity	% of population
Swimming	33.0%
Football/soccer	18.4%
Dancing (recreational)	9.5%
Gymnastics	9.0%
Netball	6.5%
Athletics, track and field (includes jogging and running)	6.2%
Tennis	5.4%
Basketball	4.9%
Cricket	4.4%
Australian football	4.3%

Planning and Providing Sport and Active Recreation Infrastructure

Sport and active recreation infrastructure includes: outdoor sporting spaces and facilities; indoor facilities; aquatic facilities; specialised and regional facilities (such as stadiums); and the trail and path networks that activate foreshores, linear parks, natural areas and other public spaces.

Current provision

Prior open space, sport and recreation studies and an initial review of current provision has highlighted the following issues and observations:

- There will be a substantial undersupply of land for sport reaching a shortfall of more than 40ha in the LGA by 2031. Many sporting fields and facilities are being heavily used now.
- Sport and recreation opportunities are not evenly distributed and the eastern part of the LGA has the majority of parks and infrastructure for passive and recreation.
- The national parks, beaches, Pittwater, Middle Harbour and Narrabeen Lagoon contribute significantly to the outdoor recreation opportunities for Northern Beaches residents. However these are major regional resources

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Papel

creating demand for access, recreation and amenity infrastructure far in excess of the LGA's population. While this regional use is an integral part of the local economy it does have a cost for council.

- Connections, particularly public transport and active transport, between eastern and western areas are limited. Creating major issues for many residents and restricting access to sport and recreation participation. Improving active transport networks and integration with public transport should be priorities.
- There are opportunities with the Frenchs Forest Precinct to increase open space, sport and recreation facilities supply.
- The level of access to public open space within 400m of residences varies greatly across the LGA with transport corridors, waterways and main roads forming barriers to access.

Strategic priorities emerging

 Meeting current and future sporting field needs will require changes in managing resources to ensure that maximum use is facilitated. This may mean that Council has to take a far more active role in booking access and maintaining assets. In effect this means that rather than past approaches where land was leased to a specific

club to manage, council will need to allocate access on hours required rather than seasons or years.

- Providing access to sporting facilities will also need to consider changing needs and participation numbers. Some sports are declining significantly in participation and have very low utilisation of land. Encouraging amalgamations and relocations may be required to free up underutilised resources.
- Investing in existing assets to improve their capacity (such as increasing provision of synthetic fields) is a core strategy, but it will not solve the growing unmet demand. It is critical that new housing development areas include provision of additional land for sport in planning.
- Multiple use strategies will also be critical and partnering with schools to provide shared use facilities for both outdoor and indoor sport and recreation is essential.
- 5. All public open space areas should be considered as offering recreation opportunities (subject to environmental assessment). Linear open space and conservation areas can include trail and path based opportunities, small recreation nodes and nature based activity. Sporting areas should provide for informal recreation as well as formal sport. Specific surfaces and facilities may need access control but surrounding areas and

marginal spaces can make valuable contributions to sport and recreation opportunities and to urban greening.

- More focus is needed on encouraging multigenerational spaces which encourage a range of age groups to use public space. Particularly with increased aged members and young peoplesharing and interaction provides for good social outcomes.
- Opportunities for rooftop sport and active recreation.

Impact of growth

Future growth will see demand for these facilities increase and although specific activities may change, additional capacity will be needed. Based on current participation data for NSW and Australia, the additional population means, approximately:

- 6,700 more sport participants;
- more than 2600 outdoor court users;
- 2100 or more indoor sport court users;
- 10,000 or more indoor recreation users for a range of activities including yoga, martial art, boxing, dancing etc.
- 77,000 or more people walking regularly on paths, in parks, natural areas and beaches; and

 Increased demand for access to beaches, waterways and the sea both for active and passive recreation and as destinations.

With an increasing population that is more active outdoors, Council is presented with an increasing amount of challenges managing contested public space. Key concerns include:

- Council can not provide more beaches, natural areas or waterways- these are generally a fixed resource. Increased demand will mean strategies to manage increased access to some areas and to disperse demand across both time and space.
- Land suitable for sport is limited and upgrading the capacity of existing assets can only go so far. Reallocating the purpose of some sporting lands to reflect changing participation will be needed.
 - Activating natural areas, recreational areas and foreshores with trails and paths and recreation areas will help address needs.
- In some cases acquisition of land may be required if it can't be achieved as a result of urban development.



Figure 12.Dee Why PCYC – contemporary facility managed by PCYC and providing sport, recreation and other programs supporting the commulty





Emerging Planning Approaches to Open Space and Recreation 4.4

Infrastructure Policy (NSW) The Urban Green 4.4.1

Government Architect late in 2017 for public review ecosystem of green space that encompasses parks and open spaces to help create a healthier, more recommends the creation of a networked urban and discussion. The Greener Places' document This draft policy was released by the NSW liveable and resilient place to live. The policy advocates for green infrastructure to be considered as essential infrastructure throughout the urban design process, from strategy to construction and maintenance.

The objectives of the draft policy are:

- To protect, conserve and enhance NSW's network of green and open natural and cultural spaces. .
 - performing and well-designed green space, To secure a network of high quality, high .

infrastructure to address the environmental establishing a crucial component of urban challenges of the twenty-first century.

- activity, social cohesion, and enhancing wellbeing To promote healthy living, encouraging physical by providing liveable places for the NSW community. •
- integrated investment through statutory planning. To create a more strategic approach to planning for green infrastructure, encouraging early and .
 - To deliver better tools for the delivery of green infrastructure across NSW.

implementation principles. There are three manuals/ tool kits that support the policy; one of these is green infrastructure supported by a range of currently in draft "Open Space for Recreation The document outlines four principles of Guide".



active recreation facilities for young people including a ½ basketbol court and skate park facilities for passive recreation.

43

im entarchitect.nsw.gov.au/policies/greener-places

Source: https://www.gov

Open Space for Recreation Draft Guidelines 4.4.2

The NSW Government Architects has proposed the adoption of Opportunity Based Planning for Open Space for Recreation*.



*note - a revised consultation draft is due for release later this year. The draft discussed here was previously released for comment but has been withdrawn pending the release of the new version

performance criteria that ensure the outcome is importance of spatial standards suggesting that be tied to recreation opportunity outcomes and while the amount of land is important it should The draft "Open Space for Recreation Guide' population, based standard and reviews the represents a significant shift away from a OS4R)- Government Architect NSW 2018 functional.

established at the time when the population-based Nevertheless, in the Northern Beaches, which was space and 2.13Ha of passive open space per 1,000 of open space, it is intended to aim to retain the provision of open space at 2.13Ha of active open standard was used for determining the quality people. The Guide recognises that a critical issue in provision is access and that for higher density urban areas the access radius may need to be smaller in recognition of the higher population loads to be supported and the additional impacts of vertical communities.

outcomes and performance criteria to suit different In summary the draft guide recommends provision urban settings (e.g. high density, greenfield, brownfield etc.)

The draft guide offers the following strategies for providing open space for recreation: Improve the provision and diversity of open space

for recreation;

- Understand the demands on existing open space and plan for open space in new and growing communities; •
- Improve the quality of open space for better parks and facilities; .
- Use open space to connect people to nature; .
- Link to the network of green space;
- Encourage physical activity by providing better parks and better amenity;
- Provide open space that is multifunctional and fit for purpose;
- Design versatile, flexible spaces; and
- Consider life cycle costs, management and

The draft guide focuses on the following maintenance.

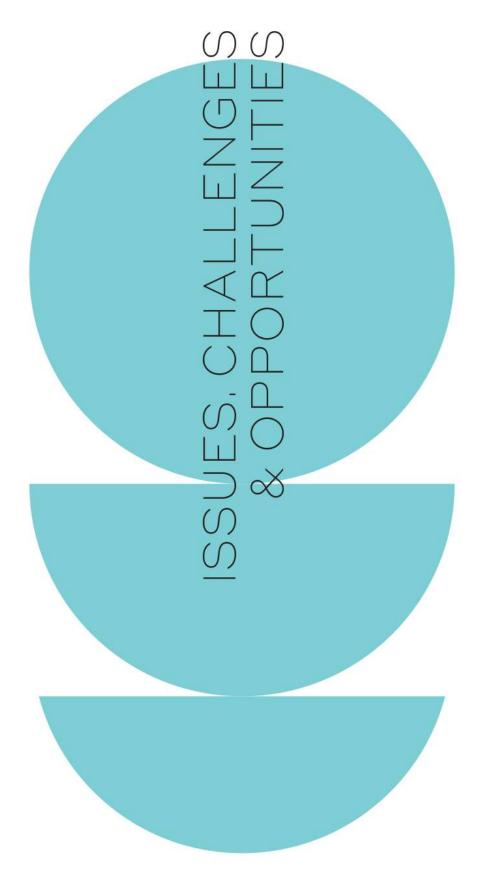
performance criteria:

- Accessibility and Connectivity
- Distribution 2.
- Size and Shape e,
- Quantity 4.
 - Quality 5
- Diversity. 0









its delivery of social infrastructure and open space Study presents an opportunity for Council to align with priorities and key directions contained within the North District Plan and other strategic plans. The development of a new Social Infrastructure

Current metropolitan strategic planning frameworks emphasising placemaking, walkable neighbourhoods, and the "30 minute city" concept. Essentially, these community facilities in close proximity to housing. influence the provision of social infrastructure by drivers seek to locate services, employment, and

Provision of social infrastructure is key to supporting the social sustainability of the Northern Beaches community as it changes over the next 20 years.

catalysing individual and community activity through facilitating creativity and enterprise, and delivering wellbeing. Social infrastructure is also essential to spaces that support economic vibrancy across a communities' capacity to actively sustain social neighbourhoods, and community health and inclusion and cohesion, vibrant and resilient Social infrastructure can strengthen local democracy and participation by building variety of business sectors.

opportunities to activate town centres and enhance Many of Council's contemporary strategies identify sense of place through place making. For example, many of the objectives of Council's Event Strategy

promote belonging, health and wellbeing outcomes seek to promote and support social cohesion and for all.

identity of local neighbourhoods. Community insights collected as part the Northern Beaches Community Well-designed and high quality social infrastructure is a key contributor to vibrant and engaging places for more places for people to gather, connect and and contribute to the distinctive character and Insights Report consistently identified the need interact within the community.

contemporary and best practice policies, models and strategic directions (both metropolitan and local). The preparation of the Draft SIS presents an opportunity to better understand the role of These include:

- North District Plan (Greater Sydney Commission);
- Joint Use of School Facilities and Land Policy Department of Education)
- People Places (State Library NSW);
- The Urban Green Infrastructure Policy (NSW Government Architect);
 - Strategic Plan 2018-2028 (Northern Beaches Shape 2028: Northern Beaches Community Council); and
- Disability Inclusion Action Plan (Northern Beaches Council).

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

Key Issues & Challenges

- and drivers. This is challenging in the context of Council's current pipeline of strategic planning requires an integrated approach and whole-of-Council alignment across a range of priorities Delivering socially sustainable outcomes and policy making.
- infrastructure will continue to increase making the future delivery and upgrade of the existing difficult amongst Council's many competing social infrastructure network increasingly Over time, the cost of delivering social priorities.
- planning, funding and managing falls to local in sustainable and healthy cities is widely The importance of social infrastructure acknowledged as a priority at state and federal levels, but the responsibility for government. •
- applicable for high amenity town centres and the Northern Beaches, this is particularly the demand is greatest. In the context of Land is typically more expensive where foreshore/beach environments. •



Key Opportunities

- Planning for the long-term provision of social infrastructure to support liveability and community wellbeing objectives.
- foster community identity and promote vibrant and diverse places to support local enterprise. Support the development of creating places
- Increased provision of multi-use facilities will assist sustainability by ensuring high social returns on assets.
- delivering social infrastructure that will enable the provision and upgrading of facilities, so Investigating new and sustainable ways of that they can continue to meet community needs and expectations.
- Partnerships with other providers and other agencies to facilitate shared provision.
- fostering community connections. For example, Re-imaging the role of other types of social infrastructure in contributing to place and surf life saving clubs and scout halls.
 - Emphasising placemaking and activating existing social infrastructure to enhance and support the daytime and night-time economies.

Case Study: Castle Hill Library and Community Centre

Overview

built in 2004, and is located at 14 Pennant St in Castle The Castle Hill Library and Community Centre was Hill. The Centre's facilities include:

- 500 seat flexible theatre and four meeting rooms A 2,000m² community centre, incorporating a (with capacities of 20, 40, 90 and 180 people, respectively); .
- A 1,900m² library, incorporating a café and Council customer service centre; .
 - Underground parking; and

company to build the whole development. Council then sold the units, and used the proceeds from that to Shire Council) acted as the developer for the site, commissioning a development and construction apartment building. To deliver the centre, the then Baulkham Hills Shire Council (now the Hills subsidise the cost of the Centre's construction. Above the centre is an eight storey residential An early childhood health centre.

apartments (for 12 levels total), however the additional This has meant that a facility which would have cost from the sale of the apartments above. The original intent was for the Centre to be entirely self-funded Council \$8-10 million, due to the income generated by delivering an additional four levels of residential approximately \$24 million to deliver instead cost neight was not approved.

Relevance to the Northern Beaches

and so would likely consider an alternate arrangement, such as a Public Private Partnership (PPP) for future facilities, in a situation where Council's limited funds apartments to market to be a challenging process, provides a creative example of a local government taking a different approach to deliver community impossible. However, this example also presents would have made financing the Centre outright The Castle Hill Library and Community Centre a cautionary tale, as Council found taking the similar projects.

Key Links

http://www.pioneertheatre.com.au

https://www.watpac.com.au/project/castle-grandapartments-library-and-community-centre/





Successful social infrastructure planning requires effective forecasting and responding to social and economic trends, including the needs of growing and emerging communities, and new patterns of living and working.

Council's current Community Strategic Plan, *Shape* 2028, has a vision for the Northern Beaches to be a 'safe, inclusive and connected community'. Social trends likely to impact the Draft SIS include:

- Provision of more medium and high density housing in some locations;
- Growth in numbers of independent entrepreneurs who are unlikely to operate on the basis of commuting to the CBD;
- Increase in residents working outside typical working hours who will benefit from great spaces to work, close to home; and
- An ageing population.

These trends will be particularly prevalent in the future for the Northern Beaches, which is expected to see strong growth in the number and proportion of 'young adults' in the LGA. The increase in higher density living can create the risk of increased social isolation, loneliness and disconnection. Provision of community facilities – as 'third spaces' for people to spend time and connect with others is a critical means to mitigate this risk to community wellbeing.

Current geographical distributions of social infrastructure throughout the LGA is mixed in terms of their responsiveness to the density of the surrounding area. For example, while there Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper

are clusters of facilities in some higher density areas, such as around Dee Why, other areas of higher density, such as Narrabeen-Collaroy have comparatively fewer facilities. Some areas will also require further analysis to determine fit they achieve the desired mix and provision of facilities - for example, while the Manly area has a higher concentration of social infrastructure (commensurate with its higher density), the facilities are predominately smaller, localised centres. There is a lack of larger multipurpose facilities.

Opportunities for a new university campus in Frenchs Forest presents a transformative opportunity to provide new social infrastructure associated with future development. New models for re-imaging and activating communal learning spaces within vertical campuses are starting to occur across Sydney (e.g. Western Sydney University's campus in Parramatta).

The Draft SIS will further explore the need and demand for community facilities, and identify future opportunities for provision as relevant. It will also focus on provision in locations that have existing clusters of amenities, including retail areas, and areas that are highly accessible by public and active transport or through car parking provision.

increased urban density and the diversified realm of physical activity will be critical in supporting both an Ensuring there are opportunities to connect with access to public spaces and places that support natural areas and green spaces along with local work and independent employment.

increasing participation in walking, running, cycling include all open spaces, bikeways, pathways, roads longer confined to formal fields and facilities but and other forms of self-directed or social group exercise. Venues for sport and recreation are no Trends indicate the rise of the active city and and waterways.

and increased acceptance of commodified sport (pay hours change and there will be increased demand for play and away sport) are all indications of this shift. work. More night time opportunities will be needed access before work, during working days and after Participation will increasingly evolve as working

demand will change. Many sports are developing new however the individual activities/ sports and times of participation platforms for new members and some codes are seeing significant growth in participation Economic pressures on clubs and sports through additional competitions, and use of venues to expand playing seasons and to improve revenue Demand for sporting spaces is unlikely to decline, associations are also seeing increased attempts as spaces for hire. of women.

Key Issues & Challenges

- and work in the LGA) and accessibility/connectivity is constrained by only a collection of arterial roads The Northern Beaches LGA has a relatively high degree of self containment (i.e. communities who live and public transport services. This emphasises the need to foster, support and re-imagine the role of local community facilities.
- need good access to community facilities that enable them to socialise and recreate outside their homes. Residents in high-density neighbourhoods such as Manly, Queenscliff, Dee Why, and Narrabeen/Collaroy placing increasing pressure of demand and existing infrastructure.
- Balancing the types and mixture of facilities to cater for different expectations remains an ongoing challenge.
- Population changes will require Council's existing social infrastructure network to meet a diverse range of needs and activities. .
- participation is difficult and often costly. However, it is essential the main areas of population growth Providing additional land to accommodate increased demand from population growth or increased include new open space and recreation facilities in planning.
- In some locations, open space and recreation facilities are not easily accessible in terms of walkability or connection to public transport links. .
- some cases retrofitting may allow increased use in others it may be necessary to redevelop or relocate. 5 Older facilities may struggle to meet the increased demands of multi-use and co-use approaches.

.

- is placing new pressure on existing sporting spaces and public parks which host many of the new fitness This undertaken in public space) is increasing as are new modes of participation in established sports. Some organised sports are declining, while personalised, individualised fitness activities (often and exercise related participation. •
- Managing self-interests, historical involvement, contributions and political influence, particularly in relation to encouraging groups to share facilities and change their arrangements.



Key Opportunities

- Foster co-working and collaborative, multipurposes spaces in locations identified for innovation and knowledge-intensive industries such as Frenchs Forest Health and Education Precinct and Brookvale.
- Explore opportunities to deliver new models of 'community lounges' as part of any future education/university campus within Frenchs Forest.
- Housing in the Northern Beaches is trending towards proportionately greater numbers of medium and high density housing typologies. Increased populations, particularly at higher density, can support commercial and cost recovery models of facilities provision.
- Open up existing single-use facilities to a broader range of users to enhance activation and utilisation through upgrades and contemporary refurbishments. Particularly in location with a more clustered level of provision - e.g. Manly, Dee Why, Narrabeen and Warriewood.
- Some community centres could potentially be re-envisioned as coworking hubs, start-up or makers spaces for use by a broad range of community members, enhancing economic as well as social vibrancy in local neighbourhoods.
- Investigate opportunities to co-locate or enhance social infrastructure provision around existing and future B-Line Stops to support the 'integrated multipurpose' model of provision.
- Parks, natural landscapes, walking and cycling paths all play an important role in fostering healthy active lifestyles. This means that a much broader range of public open space can provide for recreation needs. Ensuring multiple use approaches to all land assets will assist in future planning.

- There is opportunity to increase the provision of synthetic fields which have an increased capital cost but can increase capacity to accommodate formal sport.
- The projected increase in the active ageing population is a valuable resource for Council, as many older people are interested in participating in volunteering and community service to support their area.
- New models of provision can see community facility and sport and recreation facility needs integrated into large multi-use centres which increases their sustainability and flexibility in response to changing demands.
- For high density areas there are a number of innovative approaches to social infrastructure provision that include:
- Large central public open spaces which combine multiple uses and interface with public retail realms;
- Use of floor space within residential towers to provide community facilities, sport and recreation centres and informal community space;
- Rooftop parks, sports courts, and synthetic fields.
- An evidence based analysis of land use for sport and correlating participation numbers should allow some rationalising of current sport and recreation land and provide opportunities for more effective use of the resource.
- Shared use arrangements with schools can offer a range of opportunities for education and community use of the same facilities including sports fields, courts, indoor sport and program rooms to support a range of community based programming.



Supporting New Ways of Living and Working



to refurbish older, existing facilities that have a single user group, to make them accessible to a need. For example, there may be opportunities Renewal of the existing social infrastructure network will need to focus on efficient, costeffective responses to growing community broader range of users.

across the community. As a legacy from the former an important role in achieving this vision, especially bushland environment'. Social infrastructure plays a diverse range of social infrastructure across the Warringah, Pittwater and Manly Councils there is Northern Beaches, however there is currently no comprehensive future plan or strategy for these Council's Community Strategic Plan establishes in balance with our extraordinary coastal and inclusive and connected community that lives through facilitating inclusion and connection a vision for the Northern Beaches as 'a safe, Facilities.

role in creating positive experiences and perceptions infrastructure and open space plays an important within the community, and over time will result in The design and 'attractiveness' of social increased usage.

indoor spaces, essentially mutually increasing the space and capacity of both the building and open space facilities. Overall there are opportunities A number of Council's facilities are also located appearances, increases their functionality and some challenges around usage and activation, adjacent or within public parks, reserves, and other public open spaces. While this presents it also presents opportunities to increase the to revitalise and renew the network of social infrastructure in a way that enhances their integration and interaction of outdoor and respects local character.

Key Issues & Challenges

- Some community facilities within the Northern public transport and walkable catchments and Beaches are isolated and located away from are not accessible.
- response to provision of social infrastructure is The LGA encompasses a large geographical area with very distinctive local communities. Both a strategic and localised 'networked' required. •
- Contemporary benchmarks provide an overlay for existing supply, however do not take into account qualitative considerations such as quality, condition or population densities.
- Many of Council's facilities comprise a mixture of 1970s-1990s brick buildings. Many of these commonly require basic refurbishment to ensure they are accessible for all. •
- There are many diverse communities across the example coastal communities will have different expectations than inner-urban or rural villages. Northern Beaches and the types of activities and uses will vary depending on location. For .





Key Opportunities

- Increase the flexibility of existing facilities to ensure spaces can adapt to community needs and facilitate social connections and inclusion.
- Deliver on other strategic objectives from Council, for example provision of free wi-fi, digital connectivity and universal access for all abilities.
- A mixture of 'small fixes' (short term) and larger capital works upgrades. An example of this is ensuring all Council facilities over time are universally accessible.
- Create a truly integrated network of different types of social infrastructure.

Case Study: 'City Spaces' Re-branding

Overview

The City of Sydney has recently undertaken a rebranding exercise to promote the role of smaller venues for hire across the City. Now known as 'city spaces', the City have identified the important role that these smaller spaces play in supporting the vibrancy of local neighbourhoods and streets.

In recognition of the increasing population density and the challenges associated with acquiring new land for open space or community uses, the City have started a coordinated approach involving:

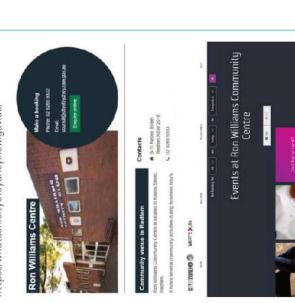
- Small scale capital works, cosmetic upgrades and other refurbishments to improve the quality and amenity of the smaller venues.
- Promotion of the unique assets of each venue in contributing to the local identity and character of the different neighbourhoods.
- Focus on localising community facilities with facilities and programs to reflect the local residents
 - needs and interests.
 Integration with City of Sydney's What's On Page
- Updates to the website to increase usability, searchability and information about each venue.

Relevance to the Northern Beaches

The City of Sydney's approach to its community facilities hire program has seen the revitalisation and upgrade of their smaller community venues across the LGA. Many of the City's smaller venues, like the Northern Beaches, are unstaffed and have varying levels of usages throughout the day and on the weekend.

Key Links

https://www.cityofsydney.nsw.gov.au/community/ community-services https://whatson.cityofsydney.nsw.gov.au/



City of Sydney



Inclusive, flexible, adaptable and multipurpose spaces and places will be required to meet emerging and future community needs (for example, fitness equipment for seniors in/around parks). However, understanding current and future needs requires continual community engagement to determine the precise facilities likely to be required.

The way that people and communities live, work and recreate is changing, and these new patterns need to inform the design and management of facilities. Challenges arise when change takes place rapidly or are not foreseen. It is important to design spaces that are flexible enough to be readily and efficiently adapted over time. For example, the "high street" model of community facility delivery, such as the Avalon Recreation Centre, provides a multi-functional, flexible space in a local centre, co-located with other services and commercial facilities that meet daily living needs. This delivery model encourages utilisation of readily accessible facilities, as well as social interaction across diverse sectors of the community, bringing people together and enhancing community, bringing people together and enhancing community cohesion. This however, may require property acquisition and/or consolidation of existing assets. It is also acknowledged that not all facilities can adopt this model, and therefore there is a need to innovate to determine appropriate contextual responses to activating facilities. It is important social infrastructure is inclusive, responding to the needs of people of all ages, genders, cultural backgrounds, socio-economic status as well as those with different types/levels of ability. With an ageing population, it is important to note that nearly 1 in 10 people over 65 years are living with dementia and thus their special needs should

be considered and acknowledged through social infrastructure design and delivery.

The provision of spaces and places for recreation and sport requires new thinking to reflect limited resources and the need to ensure that maximum return from investment is achieved. Northern Beaches Council has already begun a number of collaborations such as within Frenchs Forest Planned Precinct to develop multi-use spaces. The impact of shifting participation does mean that it is important for parks sport and recreation infrastructure to support some level of reconfiguration and adaptation. For built facilities location and design, and parthers in the capital cost of the facility reflect success. For formal sporting spaces, flexibility can be best achieved with larger multi-use precincts and planning provision in higher level terms such as:

- Spaces for rectangular fields
- Spaces for oval fields
- Court sports
- Aquatics
- Flexible indoor program spaces

All of these can be configured as demand changes to accommodate a range of similar format uses.



Issues & Challenges

- Changing community needs. What is a priority now might be very different to what is a priority in 10 years' time.
- Contemporary trends are indicating a shift by organised community groups to use cafés and other private spaces to host events over Council facilities (e.g. book clubs, organised community groups, meet-ups).
- Balancing the need for flexible and multi-use spaces with the need for purpose-built spaces for specific uses (e.g gallery and exhibition space).
- Many older sport and recreation facilities and sporting spaces were not designed around multiple use, making retro fitting difficult.
- Older facilities within the LGA have not been designed with multifunctionality in mind. Some facilities lack essential features such as toilets, lighting and carparking.
- Although some facilities are ageing and in need of replacement, and some sporting uses may have declining participation, community sentiment and a sense of ownership can create resistance to change.
- New management structures and funding models that encourage multi-use facilities have been slow to emerge and be accepted by local governments and communities.
- Perceptions around what public spaces should be delivered, can be difficult to shift and contemporary examples of successful approaches are needed to assist community understanding.
- The size and shape of the LGA requires provision of district or higher level facilities in a number of strategic locations due to the extent of travel times and general GSC guidance around the 30 minute city.

Opportunities

- Increase the flexibility of existing facilities to ensure spaces can adapt to community needs and facilitate social connections.
- Improve the digital technology available in some facilities to enable greater connectivity (e.g. installation of PA equipment in choice venues and free wifi).
- Deliver a connected network of community facilities that are easily accessible for all users.
- Better understand the social activities that drive quality of life and harness opportunities to partner with local business to enhance and deliver a new 21st century network of community facilities (cafés, restaurants, pubs).
- Ensure the Northern Beaches is supported by social infrastructure that is relatively equitably distributed to provide access for all residents, workers and visitors.
- Increase focus on provision of high quality public open space precincts supporting a range of uses and anchoring growth areas.
- Investigate development of community hubs which provide multiple use facilities meeting sport, recreation and community facility needs.
- Expand partnerships with the education sector to deliver outdoor and indoor sport facilities and potentially new play spaces or active recreation nodes.
- Consider new models of provision that enhance the cost-effectiveness and financial sustainability of sport and recreation facilities through increased commercial or partnership operating models.
- Consider converting older facilities to alternative uses, where they are no longer needed to serve a local population. Or disposal of assets to enable investment in new facilities where there is current or future under provision.



Case Study: Juanita Nielsen Community Centre

Overview

Woolloomooloo. Originally a warehouse, the building was converted to a Community The Juanita Nielsen Community Centre is located at 31 Nicholson St in Centre in 1983, and extensively renovated in 2015-16.

The Centre provides a diverse range of facilities and services to meet the needs of the equally diverse Woolloomooloo community it serves. These include:

- A community gymnasium, which offers a variety of equipment and classes, and has affordable concession memberships and operates an outreach program; .
- An entrepreneurial co-working space, which provides an opportunity for startups and local small businesses to collaborate and work for free; •
- An After Hours School Care program; .

594

- become a pocket park which is used as outdoor space for the After Hours School A reclaimed rear laneway behind the centre which has been redesigned to Care program, and is open to the public when not in use by the Centre; .
- of meetings, events, and workshops (including cooking, painting, sewing, and A range of flexible community rooms which are capable of hosting a range creative arts workshops). .

Relevance to the Northern Beaches

The Juanita Nielsen Community Centre provides a shining example of how to design and provide a facility which is able to meet the diverse needs of a community which features a broad demographic range. It is an example of a facility with flexibility as an integral element, which helps to ensure the facility will be able to adapt to changing community needs well into the future. The Centre is also an excellent example of a sensitive refurbishment and reuse of a heritage-listed building.

Key Links

https://www.cityofsydney.nsw.gov.au/explore/community-centres/juanita-nielsencommunity-centre

https://drivenxdesign.com/gov17/project.asp?ID=15991



ATTACHMENT 2

Technical Studies



Innovative thinking is needed to look at new ways to provide spaces and places. The conversion of rooftops to synthetic fields and courts, libraries as part of commercial centres, conversion of road space to public space, and public private partnerships in providing built sporting facilities are all examples.

Innovative approaches to social infrastructure are also required to take account of changing trends in living, working and recreating. Co-working spaces, libraries re-envisioned as lifelong learning hubs and flexible, adaptable multipurpose models are required to meet demand from young entrepreneurs, startups and emerging businesses. Sustainability of provision is another critical consideration for growing communities. One of the key strategies that has been adopted by many councils is that of partnership with community groups and clubs to deliver programs and services out of council facilities (such as sport clubs providing competitive sport opportunities). But times have changed and many clubs are struggling to manage facilities and provide activities. In part this is due to declining volunteerism but other factors such as: poor governance; declining participation; and competition from new sports often contribute.

In some cases these partnerships extend to the club or group leasing facilities and being responsible for maintenance of the community asset. These partnerships have also seen community groups undertaking capital developments and improvements with funds they have sourced independently of council (such as grants).

Partnerships currently tend to focus on schools and education. An infrastructure study can inform opportunities to expand scope to other government

groups, for example, government sport and recreation groups partnering with commercial land owners of golf courses to encourage the sharing facilities, addressing shortages of supportive infrastructure. This could be achieved through initiatives such as the utilisation of hard surface locations for parking on weekends.

To facilitate renewal of facilities and spaces in the context of population growth and limited funding, Northern Beaches Council can seek to explore shared use models, partnerships with community service providers and the private sector, and models that that take account of new development to deliver new social infrastructure.

There are new models which respond to contemporary trends, in particular better consideration of commercial opportunities to generate revenue that offsets those activities needing support are now more accepted in social infrastructure planning. Including retail space, leasing to commercial managers, seeking private capital, integrating facilities into key precincts that activate areas are all evident in major cities. The most important issue is the planning undertaken for future facilities, in particular the preparation of rigorous feasibility studies that develop sustainable models and provide clear indications of any subsidies that may be required. 57

northern

Issues & Challenges

- At present there is a knowledge gap of existing social infrastructure across the Northern Beaches and within the broader/adjoining area.
- Increasing financial demands on local government, combined with rising infrastructure costs and increasing expectations from the community.
- Increasing costs of development of social infrastructure, not adequately met by development contributions or rates-based funding models.
- Importance of open space and recreation infrastructure in creating sustainable and healthy cities is acknowledged as a priority by state and federal governments but they are rarely interested in supporting recurrent costs, preferring to contribute capital only. Much of the responsibility to ensure planning, and feasibility falls to local government.
- The provision of sport relies heavily on community clubs, many of whom report declining volunteerism and increasing financial and organisational stress.
- Increasing financial pressures from controls on rates, borrowings and developer charges impacts a councils ability to deliver new infrastructure.
- Some ageing facilities lack the flexibility to respond to the need for reconfiguration and redevelopment either due to legacy issues, community values or site constraints.

Opportunities

- Deliver new integrated multipurpose hubs in growth areas such as the Frenchs Forest Planned Precinct, Dee Why Town Centre, Manly and the Warriewood Valley Release Area.
- Establish social infrastructure through community hubs for example flexible, multipurpose spaces that can accommodate a range of uses in one location.

These provide improved access to a range of services, encourage compatible uses and supporting partnerships between service providers – and are also a cost-effective way of delivering essential community services.

- Facilitate shared use of social infrastructure, including school facilities maximising the use and efficiency of spaces and buildings for community use by opening up facilities that are currently underutilised or only available to a single user group.
- Explore opportunities to enhance the cost-effectiveness and financial sustainability of social infrastructure by exploring additional revenue schemes (VPA).
- Deliver integrated land use outcomes that benefit the community and encourage collaboration and partnerships.
- Establish partnerships with other providers and other agencies to share provision and operational costs as well as ensure maximum utilisation levels.
- Utilise more semi-commercial and revenue opportunities to cross subsidise social infrastructure and establish facilities that can be individually sustainable.
- Explore innovative partnerships and the potential for private sector development to build recreation facilities as part of adding value to commercial and mixed-use developments.
- Introduce more flexibility in planning schemes and sport and recreation facilities planning to consider floorspace solutions for new facilities where council rents space rather than building a new facility.
- Invest in the social capital of communities through programs that strengthen community groups and clubs' viability. This could include both skills training and assisted processes for amalgamations and financial viability strategies.



Case Study: Campbelltown Writers' Retreat

Overview

The Campbelltown Writers' Retreat is a dedicated place for writers. Located in a former school in a bushland setting at Wedderburn, 12km from the Campbelltown CBD, the Retreat provides a peaceful setting for writers to focus on their works.

The Retreat is a partnership between WestWords, a not-for-profit registered charity, and Campbelltown City Council. It is delivered and managed by WestWords, and works on an affordable membership model. Membership can be purchased on a weekly, monthly, or six-monthly basis, with membership costs working out to a daily rate of between S3.42 (for the six-monthly membership) and \$5.70 (for the weekly membership option).

For the membership cost, members get 24/7 access to the Retreat and its facilities, which include dedicated spaces to write, free Wi-Fi, and a fully equipped kitchen. Members also get discounted rates for WestWords' regular writing workshops, held every 6-8 weeks, and showcase events, with guest writers and open mic sessions, held at either the Retreat, or WestWords' two other Writers' Centres at Parramatta and Katomba. Membership also provides access to WestWords' resources for additional writing services, such as editorial and publication advice.

Relevance to the Northern Beaches

The Campbelltown Writers' Retreat is an interesting example where a local council has partnered up with a not-for-profit organisation to provide a community service which operates on an innovative and affordable subscription model. Further, it provides a use which activates and ensures utilisation of an out-of-centre Council building, both through the writters using the writting spaces, and also through the events WestWords operate at the Retreat.

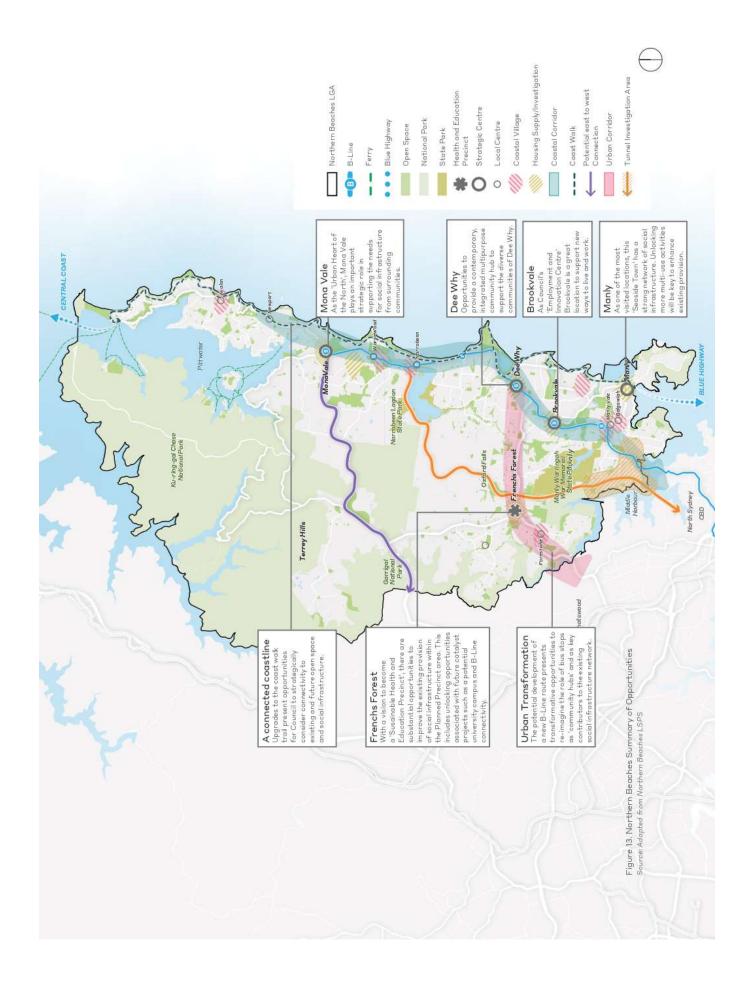
Key Links

https://www.westwords.com.au/projects/campbelltown-writers-retreat/ https://www.campbelltown.nsw.gov.au/ServicesandFacilities/Libraries/ Adultandseniorsservicesandprograms/WestwordsCampbelltownWritersRetreat

Source: WestWords







This Issues and Opportunities Background Paper has provided an overview of the existing social infrastructure provision within the Northern Beaches. It has also identified the high level planning policies and objectives that guide future provision of social infrastructure across the North District and identified opportunities for future provision. The findings presented in this Paper will be further explored though the development of the Draft Social Infrastructure Study and shaped by additional analysis, benchmarking-based assessments and a comprehensive needs, demand and gap analysis.

The next stage of the project will undertake a community needs analysis involving an assessment of existing supply, demand and gaps for social infrastructure. This analysis will be presented in the forthcoming Social Infrastructure Study. The SIS will also deliver clear guidance on how social infrastructure may best be provided and managed to sustain liveability and community wellbeing in the Northern Beaches, now and into the future.

In summary the next steps of the project involve:

- Prepare Draft Social Infrastructure Study;
- Prepare Final Social Infrastructure Study; and
- Present key findings to Council.





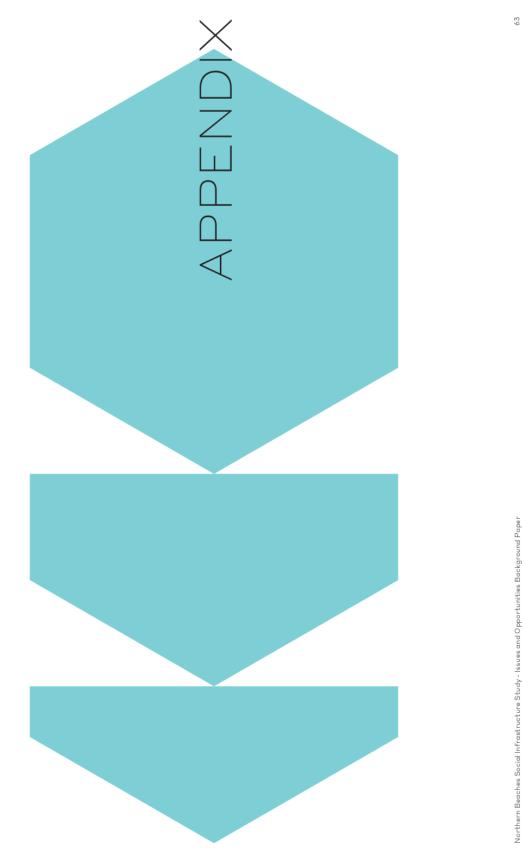


ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

Libraries offer an active hub for the local community, especially those like the Glen Street Library, which provide a range of spaces, computers, and free WiFi, to meet the needs of a variety of users.

Source: Northern Beaches Council.







French Forest Planned Precinct

Theme

Green Infrastructure Green Infrastructure

Appendix A: Thematic Summary of Existing Plans and Policies

Name of Plan/Strategy	Date of Publication	Application	Theme	Name of Plan/Strategy	Date of Publication	Application
Hospital Precinct Structure Plan	August 2017	Frenchs Forest	French Forest Planned	Draft Frenchs Forest Green Plan	March 2019	Frenchs Forest
Draft Northern Beaches - Demographic Anglysis	April 2019	Northern Beaches	Demographics	Greater Sydney Public Open Space Audit	December 2016	Greater Sydney
Asset Management Strategy 2018- 2019	2018	Northern Beaches	Asset Management	Draft Greener Places	October 2017	Greater Sydney
Northern Beaches Coast Walk Public Art Strategic Plan - Community	February 2019	Northern Beaches	Public Art	Warringah Council's Ageing Strategy - Living Well Warringah	February 2014	Warringah Council LGA
Engagement Draft Report	The second second	- 1000 - 1000		Mona Vale Performance Space Survey	May 2018	Mona Vale
Prublic Art Scoping Study	February 2019	Northern Beaches	Public Art	Mission Australia - Youth Survey Report 2018	2018	Australia
Draft Northern Beaches Coast Walk - Public Art Strategic Plan	February 2019	Northern Beaches	Public Art	Mona Vale Performance Space	Mary 2018	Mona Vala
Draft Northern Beaches Community Centres Strategy - Baseline Report	August 2018	Northern Beaches	Community Centres	Draft Northern Beaches Community		Northern Revolue
Mona Vale Performance Space - Community Engagement Report	September 2018	Mona Vale	Performance Spaces	Centres Strategy Northern Beaches Community		
Creative Art Space - Workshop Series Report	April 2018	Northern Beaches	Creative Spaces	Centre Strategy - Uratt Recommendations Report	November 2018	Northern Beaches
Northern Beaches Digital Transformation Strategy	July 2017	Northern Beaches	Digital Transformation	Pittwayer Public and Recreation Strategy	October 2014	Pittwater Council LG
Northern Beaches Council Disability Inclusion Action Plan 2017-2021	June 2017	Northern Beaches	Disability	Playscore - Community Insights Report - Northern Beaches Town Centres and Village Centres	August 2018	Northern Beaches
Community Engagement Summary Report - Draft Arts and Creativity Strategy	November 2018	Northern Beaches	Arts and creativity	Shape 2028 - Northern Beaches Community Strategic Plan 2018- 2028	A pril 2018	Northern Beaches
Draft Arts and Creativity Strategy - Connected Community 2028	November 2018	Northern Beaches	Arts and creativity	Greater Sydney's Social Capital Its Nature and Value	October 2017	Greater Sydney
Draft Pittwater Waterway Strategy 2038	November 2018	Pittwater	Waterways	Northern Beaches Council Sportsgrounds Needs Analysis	December 2016	Northern Beaches
Draft Creative Warringah 2014-2020	June 2014	Warringah Council LGA	Arts and creativity	Northern Beaches Sportsgrounds Strategy	July 2017	Northern Beaches
Move - Northern Beaches Draft Transport Strategy 2038	August 2018	Northern Beaches	Transport	Northern Beaches Council - Draft Urban Tree Canopy Plan	September 2018	Northern Beaches
Northern Beaches Walking Plan	April 2019	Northern Beaches	Active Transport	A Spirit of Play - Warringah's Open Space Strategy	November 2015	Warringah Council LGA
Northern Beaches Events Strategy 2019-2023	June 2018	Northern Beaches	Events	Warringah Council - Recreation Strategy 2009	December 2009	Warringah Council LGA
Frenchs Forest Open Space for Recreation Options Analysis - Frenchs Forest Hospital Precinct	March 2019	Frenchs Forest	French Forest Planned Precinct	Warringah Council's Youth Strategy 2013-2023	2013	Warringah Council LGA
Frenchs Forest Social Infrastructure Needs Study	September 2018	Frenchs Forest	French Forest Planned Precinct	Northern Beaches Council – Draft Mona Vale Place Plan	2017	Northern Beaches

Public Space and Recreation Town and Village Centres

iter Council LGA

Social Infrastructure

Social Infrastructure

Arts and creativity

Arts and creativity

Youth

Elderly

Public Space and Recreation

Place Plan

Youth

Green Infrastructure

Green Infrastructure

Green Infrastructure Green Infrastructure

Social Capital Community

Northern Beaches Social Infrastructure Study - Issues and Opportunities Background Paper



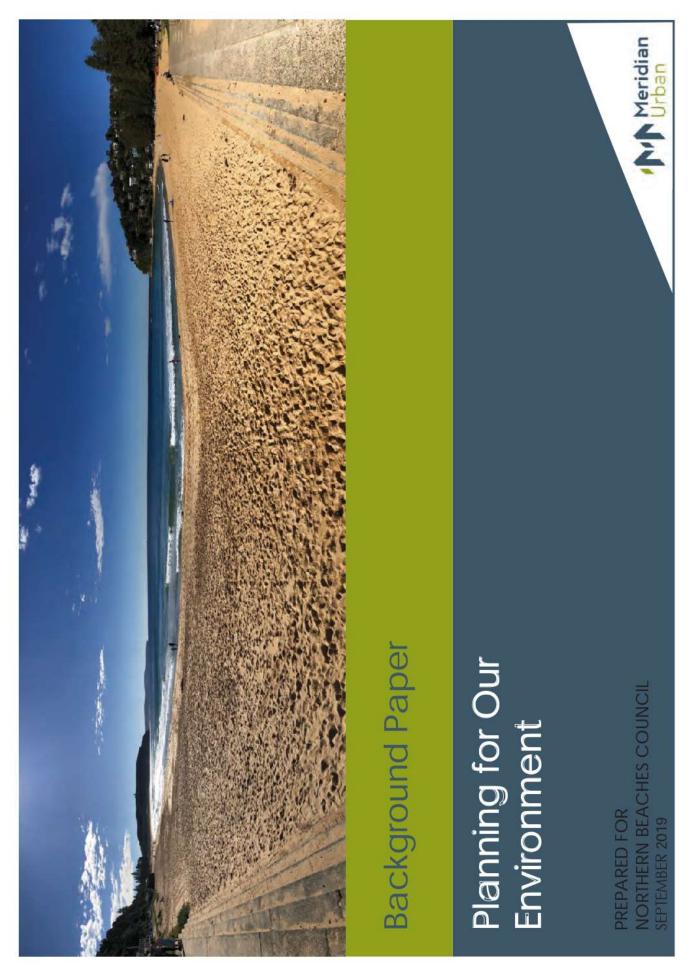
ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

65

Name of Plan/Strategy	Date of Publication Application	Application	Theme
Northern Beaches Council – Spotlight on Avalon	2019	Northern Beaches	Place Plan
Warringah Council – Multicultural Strategy 2015-2020	2015	Warringah Council LGA	Multicultural
Pittwater Council Youth & Families Emerging Issues Paper	N/A	Pittwater	Youth
Manly Youth Strategy	N/A	Manly	Youth



ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019





Background Paper - Planning for our Environment Northern Beaches Council

northern beaches council

Cover image: Local Banksia Flower Image (Right): Looking across Dee Why Lagoon mouth to Curl Curl Image next page: Scribble Gum

Prepared by © Meridian Urban Pty Ltd

Reproduction of this document or any part thereof is not permitted without prior written permission of Meridian Urban Pty Ltd.

All images contained within this document remain the property of Meridian Urban and Northern Beaches Council unless otherwise stated.

REV NO.	DATE	DESCRIPTION	PREPARED BY	APPROVED BY
A	31 May 2019	Draft for council comment	Catherine Ryland Laura Gannon Julie Brook Fraser Ramsay	Stephen Dredge
8	1 July 2019	Draft for council comment	Catherine Ryland Laura Gannon Julie Brook Fraser Ramsay	Stephen Dredge
U	1 August 2019	Final	Laura Gannon Julie Brook	Stephen Dredge
D	29 August 2019	Revised Final	Laura Gannon Julie Brook	Stephen Dredge
ш	10 September 2019	Completed Final	Laura Gannon Julie Book	Stephen Dredge



September 2019





northern beaches council

Contents

ntroduction	-
Our Intrinsic Environmental Values	3
Planning for Our Environment	7
Healthy Coast and Waterways	8
Bushland and Biodiversity	12
Scenic Landscapes	17
Greener Urban Environments	20
Efficiency	25
Resilience	28
Conclusions	32



Page ii

September 2019



The purpose of this document is to provide background to the intrinsic environmental values of the Northern Beaches across six identified environmental priorities. These priorities are guided by the North District Plan and form the basis of the environmental considerations going forward as Council prepares to draft a new planning framework for the region. The Northern Beaches has unique character and diverse natural and cultural values. Developing a new planning framework presents an outstanding opportunity to strengthen the link between the natural and built environments and community values for the Northern Beaches.

The desire to live in a unique environment, and the degree of connection between people and place, is perhaps more pronounced on the Northern Beaches than other locations.

This quality advances the need for clear policy directions which contribute to 'shaping' growth and prosperity into the future through the community's meaning of these place-oriented environmental values. In fact, a conversation on growth simply cannot be had in isolation of the environment. They are intrinsically linked. Northern Beaches 2040: Planning Our Sustainable Future' outlined the process for establishing a new land use planning framework across the region. The new planning framework will have a primary goal of protecting the environment of the Northern Beaches. Technical studies are being undertaken to develop the new planning framework including:

- demographic analysis, employment and housing strategy;
- social infrastructure study; and
- community engagement analysis.



Source: Northern Beaches Council

This background paper complements the body of knowledge to help shape and balance future growth through the new planning framework.

To deliver a new planning framework, a hierarchy of strategic documents is followed which is referred to as the 'line of sight'. Strategic visions and priorities from higher-order documents such as those developed by the Greater Sydney Commission are given

Page 1



meaning at a local level, before deciding how they will be delivered through local planning instruments.

This background paper will inform the development of an Environment Study which will contribute to changes and direction in the drafting of the new planning framework documents. The framework includes the **Local Strategic Planning Statement** for the Northern Beaches; a single **Local Environmental Plan** and a single **Development Control Plan**. Together, they are the local response to the district and regional planning activities and a fresh way forward to 2040 for the Northern Beaches. The documents directly influencing local planning is the North District Plan. It defines eight 'Directions for Sustainability', including:

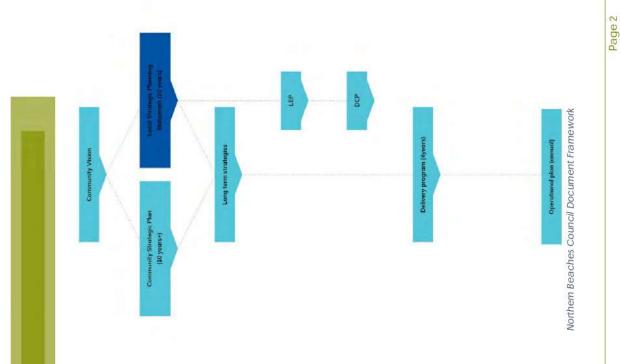
- Healthy coasts and waterways
- Bushland and biodiversity
- 3. Scenic and cultural landscapes
- 4. Rural character areas
- 5. Greener urban environments
- 6. High quality open space
- 7. Efficiency; and

 - 8. Resilience

This background paper addresses six of these eight priorities.

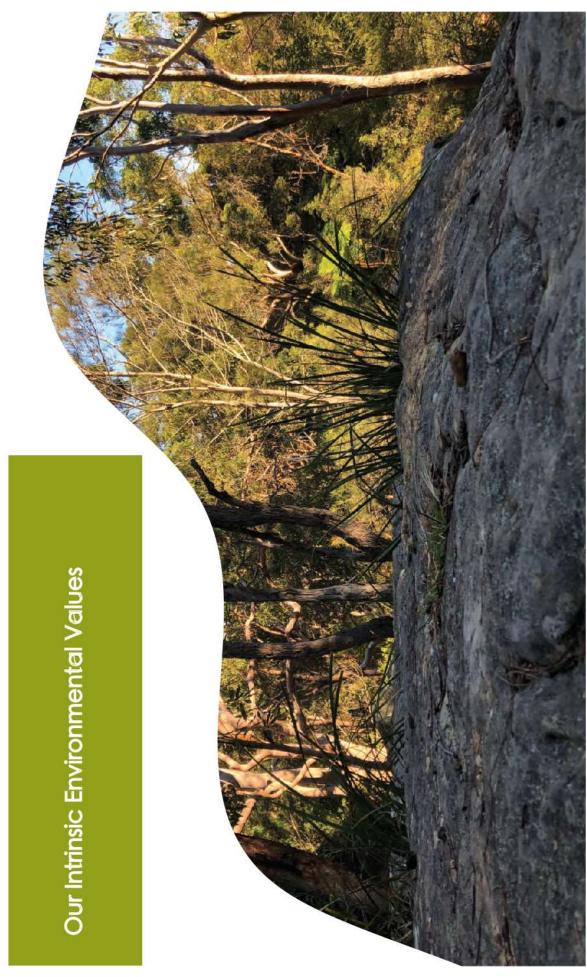
The Northern Beaches document structure is shown at right indicating the role of land use planning within the broader Council strategic vision.

These sections are supplemented by a series of maps, highlighting the potential spatial context of the various environmental opportunities inherent across the Northern Beaches. These maps also underpin Council's Draft Local Strategic Planning Statement.





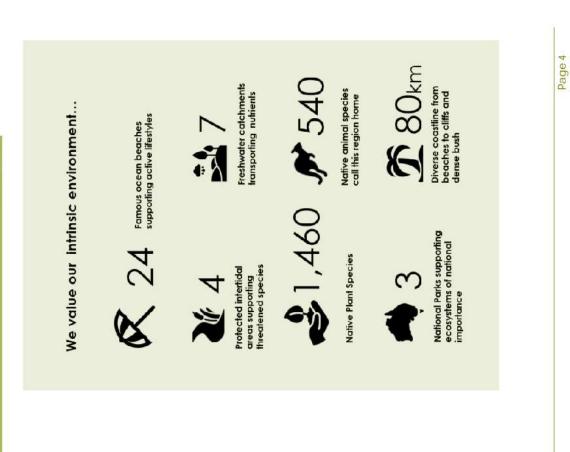






The Northern Beaches is unique, comprising a vast number of environmental values which set it apart from other areas of the State, Australia and even other areas of the world. The unique landscape and natural environments of the Northern Beaches are the basis for a strong connection between places and their people - resulting in a unique lifestyle and amenity. The Northern Beaches includes the Ku-ring-gai Chase, the Garigal and the Sydney Harbour National Parks. The Ku-ring-gai Chase National Park is the second oldest national park in Australia. It is heritage listed with 40 mapped vegetation communities including the taller Pittwater Spotted Gum Ironbark Forest and the low-lying Coastal Headland Heaths. There are abundant watercourses which provide sanctuaries for wildlife and vegetation. These creeks wind and flow through natural and man-made environments into the lagoons and ocean. Pittwater is a major waterbody of the Hawkesbury River. Waterways perform valuable environmental and ecosystem services cleaning and conveying nutrients, providing refuge, food sources and habitats. The coastal floodplains of the Northern Beaches include some significant freshwater and estuarine wetlands. The Warriewood wetland is the largest remaining sand plain wetland in the northern Sydney area, at 26ha. It is a popular bird watching area recording over 80 bird species, including the threatened Regent Honeyeater and Black Bittern. Careel Bay in Avalon is an estuarine wetland providing a combination of natural features and habitat for marine life and bird species. The Dee Why lagoon is significant for its salt marshes. A total of 116 bird species have been recorded in the immediate catchment. The Northern Beaches is identified as having the only mainland breeding colony for Little Penguins.





The natural landscapes support diversity in flora and fauna. The sandstone heathlands and woodlands in the Narrabeen Lagoon catchment at Ingleside, Belrose and Oxford Falls are habitat for the vulnerable Eastern Pygmy-possum and endangered Southern Brown Bandicoot. Important Grey-headed flying fox camps occur at Balgowlah, Warriewood and Avalon.

The Manly Dam catchment includes the only known locations of the critically endangered plant: Seaforth Mintbush. The critically endangered *Grevillia caley* is also found in an 8km² area surrounding Terrey Hills. Threatened ecological communities include Pittwater Spotted Gum Ironbark Forest, Coastal Upland Swamp, Swamp Oak Floodplain Forest, Duffys Forest, Coastal Saltmarsh, Themeda grasslands, Eastern Suburbs Banksia Scrub, Littoral Rainforest and Swamp Sclerophyll Forest.

The coastline landscape, characterised by dramatic escarpments and sandstone plateaus, is deeply incised with heavily vegetated river valleys which form sanctuaries for wildlife among the 13 headlands. The headlands were formed during the Triassic period, approximately 199-251 million years ago. The geological characteristics of these headlands are predominately formed from a sequence of sedimentary rocks including claystone formations, interbedded sandstones and siltstones, while the mainland is characterised by an extensive terrain of Hawkesbury sandstone plateaus. There are also a number of rock platforms that are the most accessible marine habitats. The rocks are home to variety of plants, animals and invertebrates such as starfish, crabs, shellfish and intertidal invertebrates. Rock platforms at Bungan Head, Mona Vale, Dee Why and Shelley Beach Headlands have been designated as intertidal protected areas. The larger rock platforms at Cabbage Tree Bay, North Harbour, Barrenjoey, Long Reef and Narrabeen Headlands are Aquatic Reserves.



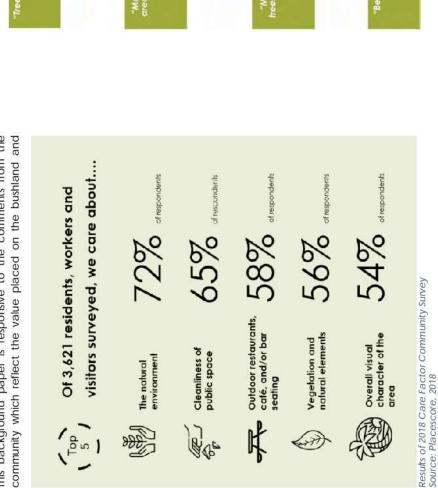
Endemic and threatened Grevillia caleyi Source: Northern Beaches Council

Part of the region's intrinsic value is the range of landforms, proximity to Sydney, views to the elevated bushland, Pittwater, the Hawkesbury and endlessly to the Pacific Ocean. The vantage points and view lines are integral to the many ways locals derive meaning, appreciate and use the Northern Beaches natural environment.

Page 5



The community has previously provided extensive feedback on the environmental values of the Northern Beaches' town centres. Below is snapshot of feedback via a 2018 community survey conducted by Placescore. This background paper is responsive to the comments from the



natural setting of their community. The community has expressed through the place score activity the conditions for the future of the Northern Beaches to progress in harmony with the natural environment.



Page 6

September 2019

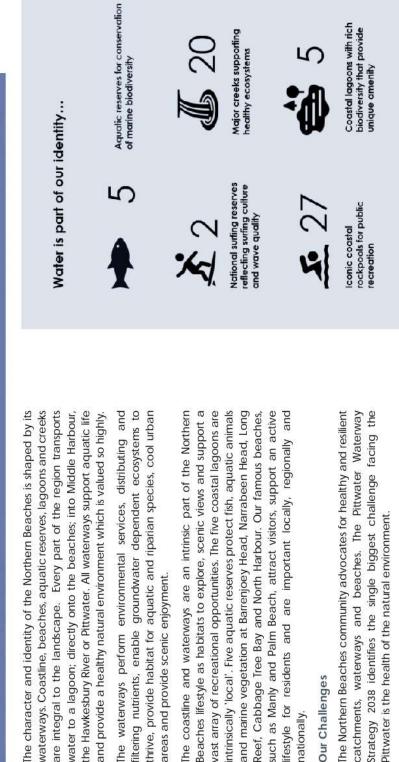




September 2019



Healthy Coast and Waterways



Our Challenges

nationally

The Northern Beaches community advocates for healthy and resilient catchments, waterways and beaches. The Pittwater Waterway Strategy 2038 identifies the single biggest challenge facing the Pittwater is the health of the natural environment. Materways, coastal lagoons and beaches are susceptible to pressures from a changing climate, changes to development patterns values of aquatic ecosystems require protection to continue to and stormwater drainage from urban land uses. The intrinsic natural provide vital services to the people and the environment.

Sustainable recreational use and enjoyment of water-based environments of the Northern Beaches is desirable for residents and

visitors. The visual and environmental quality of the coastline supports the beaches and waterways is paramount to maintaining lifestyle and tourism, while continued community access to and scenic views of place attachment.



Balancing protection of the natural environment with continued and increasing access to the waterways for recreational purposes is a significant challenge.

"We aspire to protect the natural and built environment from the visks and impacts of global and local pressures."

Source: Shape 2028

Our Opportunities

There is an opportunity to consider waterways as an infrastructure environmentally sensitive waterways and address the cumulative asset - a 'blue asset' to be integrated into decision making to protect mpact of land management decisions. The network of waterways, drainage paths and the coast should be viewed as a connected and dependent network which contributes to community liveability.

Through development controls, storm water runoff can be controlled and treated before entering the local waterway, protecting it from increased flow and excess nutrient and sediment load. There is an opportunity to ensure that new developments do not have a negative impact on the quality of water environments. Improving water quality and flow characteristics along the system ensures enhancement of waterway health. This can be achieved through introducing stormwater controls which are tailored to the receiving waters. Maintaining coastal vegetation on dunes and coastal headlands chrough planned bush regeneration activities provides habitat for flora and fauna as well as building the resilience of these systems to coastal processes



Source: Northern Beaches Council

Priorities in Practice

Northern Beaches Council will consider land use planning tools to protect and improve waterway health and ensure sustainable recreational access to waterways in the following ways:

- ensuring opportunities for waterway protection such as setbacks and buffers are contained in planning instruments; •
- incorporating development controls into relevant policies management cycle water implementing integrated and planning instruments;
- ensuring opportunities for enhanced access and connectivity are in planning instruments;



ensuring recreation is sustainable and prioritizes protection of the coast and waterways;

.

- ensuring any planning controls encourage the use of beaches and foreshores as places for people, events and celebration;
- continuing place-based master planning of foreshores and beaches and consider adopted plans in local planning instruments;
- continuing monitoring waterway condition to understand the impact of development;
- ensuring local zoning and development controls protects the local environment and maintains valued areas for public use;
- identifying places of significant value and balance outcomes between protection for conservation and recreation;



Middle Harbour Source: Northern Beaches Council

September 2019



Coast walk Source: Northern Beaches Council

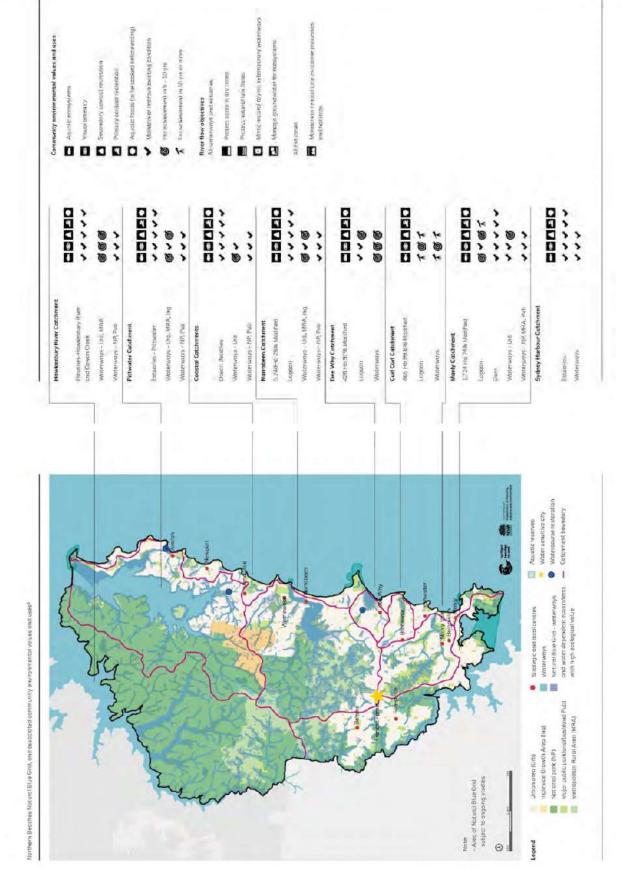
- celebrate and leverage views and vistas across waterways, for the benefit of access opportunities to foreshores and reserves; and
- ensure planning activity is completely integrated with a lens across all opportunities for connection including green and blue grids.

The coast and waterways map over leaf highlights Northern Beaches Natural Blue Grid, and associated community environmental values and uses (Source: jointly prepared by Northern Beaches Council and the Environment, Energy and Science Group of DPIE, supported by the NSW Government as part of the Marine Estate Management Strategy (2018-2028) water quality initiative).





ATTACHMENT 2





northern beaches council

> The bushland across the Northern Beaches is integrated with existing urban areas, providing natural corridors across the region. Core areas of bushland include, larger Council reserves located at Manly Dam, Allenby Park and Ingleside Chase Reserve and the state managed national parks. Importantly, a valuable network of local wildlife corridors link these core areas.

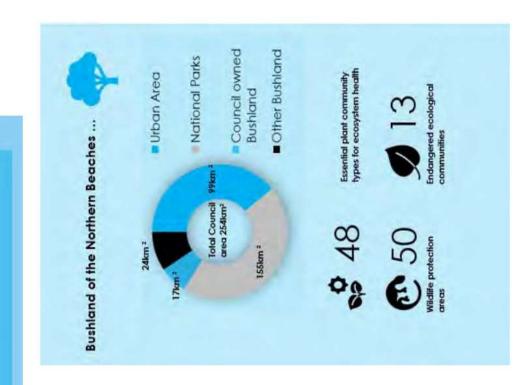
The national parks contribute largely to the core bushland of the region, however the extent of bushland outside of these areas, on council managed lands and on private land is considerably less. Bushland on Council managed lands is 17km² of the area. The remainder of the bushland is found in state government owned land, schools, and in private ownership. It is these areas that offer the opportunity for future protection under our new planning framework.

The bushland contains representations that are essential to the conservation of local ecosystems and biodiversity generally. Healthy bushland and biodiversity in the Northern Beaches contributes to community health and wellbeing, visual and recreational amenity and economic diversity, including increased revenue for tourism, fisheries and other related industries. Well protected and accessible natural environments deliver social, environmental and economic benefits.

Our Challenges

The largest tracts of bushland outside of national parks are in the larger Council managed reserves such as Manly Dam, Allenby Park and Ingleside Chase Reserve. A substantial proportion of Northern Beaches bushland is in private land holdings which form a considerable contribution to the overall bushland identity of the Northern Beaches.

The challenge is to protect the natural environment while providing sustainable access for recreation and enjoyment along with





protection and conservation. Quality, quantity and access to passive and active open space is a determining factor in levels of community satisfaction, towards which access to the natural bushland and biodiversity is a primary factor. Finding the right balance between conservation of natural areas and access for recreational purposes is often problematic in areas valued highly for various reasons

The metropolitan rural areas support a diverse habitat and biodiversity, contributing to the wider green grid and environmental attributes of the Northern Beaches. In some cases, they provide important buffer areas between core bushland and urban areas. In other areas, such as Oxford Falls Valley, they provide essential core habitat and linkages to surrounding bushland and national parks forming essential corridors for the movement of flora and flauna. Smaller areas of bushland are in public and private land holdings spread across the Northern Beaches forming a valuable network of local wildlife corridors. Corridors and connectivity between bushland areas is vitally important to maintain safe wildlife passage; buffers between natural bushland and urban areas; and help protect against the encroachment of invasive species, The challenge is to protect these important areas for the benefit of the broader community and the conservation of local biodiversity, through sustainable planning approaches. Bushland and the biodiversity it supports, faces threats from development, and the pursuit of private views and the fragmentation of corridors and buffers.



Early Morning at Manly Dam Source: Meridian Urban



Our Opportunities

Bushland is part of the green infrastructure network and is a community natural asset. In the future, thinking of the natural environment as an asset must be considered in activities which impact natural bushland and the biodiversity it supports.

Vatural open space is land that is primarily protected for conservation but also serves as parks, gardens, linear corridors, and nature reserves. These areas are made available for recreation, play, swim and unstructured physical activity. They include coastal walkways, beaches and reserves, cycle and walking trails or paths, seating, ookouts and viewing platforms and opportunity to enjoy the outdoors without team participation.

An array of ecosystems including threatened ecological communities such as the Pittwater Spotted Gum Ironbark Forest and threatened species such as *Grevillia caleyi* and can be, in part, protected by the land use planning framework. Land use planning allocates land for development, determines setbacks, decides densities and proximities and sets conditions for environmental management for new projects. It must also ensure that people are safe and have adequate access to services and open space. Land use planning can help ensure new developments are designed to avoid and minimise impacts upon bushland and biodiversity in the first instance. The NSW biodiversity offset scheme can provide for permanent protection and ongoing management of bushland however offsets are often retired out of the local area and there are opportunities to increase the availability of local offsets. Planning can also protect existing public reserves; ensure they remain available for public use or for environmental purposes and recreation.

Priorities in Practice

The following priorities in practice will be considered to ensure bushland and biodiversity values are reflected in the new land use planning framework. These include:

- protecting intrinsic natural assets and value, maintaining ecological and biodiversity function and value;
- containing urban development within the existing urban area;
- ensuring local zoning and development controls protect the natural environment including its links, corridors and essential habitats;
- finalizing the documentation and mapping of vegetation, ecosystems, species, habitats and wildlife corridors to ensure protection and opportunities for conservation are created in the areas most suitable;
- ensuring land use planning controls protect bushland and biodiversity from unnecessary land clearing or fragmentation;
- ensuring land use planning is aligned with the Plans of Management for reserves;
- considering purchase of strategic land parcels with significant biodiversity value;
- increasing the availability of local offsets by providing incentives and/or assistance to property owners to conserve bushland;
- ensuring any new projects adjoining bushland areas have appropriate separation and clear buffers from hazardous fuel loads, wildlife habitats and other considerations;



creating opportunities for the retention and protection of bushland and biodiversity habitat through avoidance and minimisation of impacts before the use of local offsets and by seeking to maintain habitat-connectivity for wildlife (e.g. wildlife corridors);

- creating opportunities for sustainable recreation activities (e.g. bushwalking), environmental education (e.g. educational displays and signage) and scientific research wildlife and projects science monitoring/observation); citizen (e.g.
- continuing to monitor and report on of the extent of bushland throughout the Northern Beaches area;
- encouraging new development to 'protect with pride' and raising the importance of their role in maintaining valued places and attributes;
- ensuring sustainable access approaches are considered in environmentally sensitive areas;
- identifying places of significant value and balance outcomes between protection for conservation and recreation;
- regenerating compromised areas and restoring elements in both natural and built landscapes during redevelopment;
- continually improving natural open space in areas which are targeted for growth to meet the needs of new residents; and
- ensure opportunities arise for enhanced education and celebration to landowners of the natural environment in development. identified with collaborate

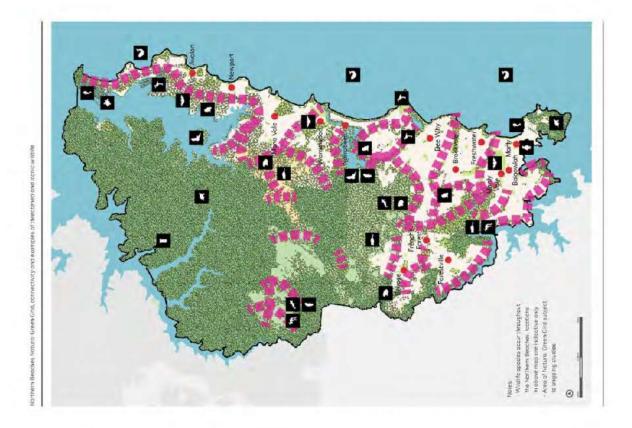
The biodiversity map over page illustrates at a strategic level, the Northern Beaches natural green grid, connectivity and examples of threatened and iconic wildlife (Source: Northern Beaches Council, 2019).





ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019

little penguins		Glant burrowing frog	Weedy seruiragons	Eusturn oggrav cuesum 🔥 Otels Kodlas	Brdscf prey	La Aum Suburba Bankao Sarub - Munarovea LEC	Etatem Pygoy-posaum	Swarro Wallaby
nglesse unoven wen Net und park	Major public park and/bushland	Methopateon Burdt Area (MEA)	Strategic and rotal centres	Net well Green God OEH. Net we vegetarion (2016) Net we vegetarion (2016) and Brid Vursity volues (2013)	Wildlife comidars and connectivity	(tronsf flanctsnest FEC* Examinisation) EEC	Premeds Crassiands EEC Bistory Oval	Sec Ecgle



The scenery of the Northern Beaches is iconic. Its diversity in a small area and proximity to a world city is remarkable. The area includes natural bushland, peaks and valleys, coastal headlands and treasured beaches, waterways, escarpments, headlands and cliff faces. The townships, views and vistas to and from these locations in the public realm are equally impressive, especially the outstanding views to the skyline of Sydney and the Pacific Ocean.

Vantage points which contribute to scenic values, prized by locals and tourists alike are Governor Phillip Lookout, Barrenjoey Lighthouse, Shelly Beach Headland Lookout, Long Reef headland and plentiful vantage points along the coastline, headlands and surrounding elevated bushland. Together they weave the fabric of place attachment and give meaning to the people who live here.



sunnse Source: Northern Beaches Council

September 2019

The region is spoiled for scenic beauty...



Coastal walkway showcasing scenic and cultural icons



Lookout points to savour this beauty and create memories



Prized headlands each with its unique character and values ATTACHMENT 2 Technical Studies



Our Challenges

The challenge is to position and respect these places on the Northern Beaches. The values given to these scenic landscapes must translate nto the planning framework as important elements for future development to consider. The challenge includes maintaining, regenerating, and being long-term custodians of scenic values for the greater good. This means that the views and vistas to and from public places of significance remain primary. Their natural settings and new attributes are maintained and precede considerations for development or private property. Striking a balance between allowing public access to scenic Public access to these places may raise issues of safety and conservation, however understanding and appreciation of the contribution scenic places make to the lifestyle and identity of the Northern Beaches is enhanced when people can readily enjoy them. landscapes and preserving these for the future is a delicate task.

Priorities in Practice

624

Council will consider, the scenic landscape values in the new land use planning framework through:

- continuing the implementation of adopted and committed plans or strategies that support the retention of scenic landscapes;
- ensuring adopted projects are woven into the new planning framework;
- designating and mapping important scenic and cultural landscapes as Scenic Protection Areas where possible;
- ensuring public views of scenic landscapes are enhanced through innovative urban design of new development and everaged as an asset;

September 2019

pursued to make the community more aware and passionate, to protect the environment and culture we hold in Sydney's north." 'An increased awareness of history of the local area should be

Source: Towards 2040 survey response

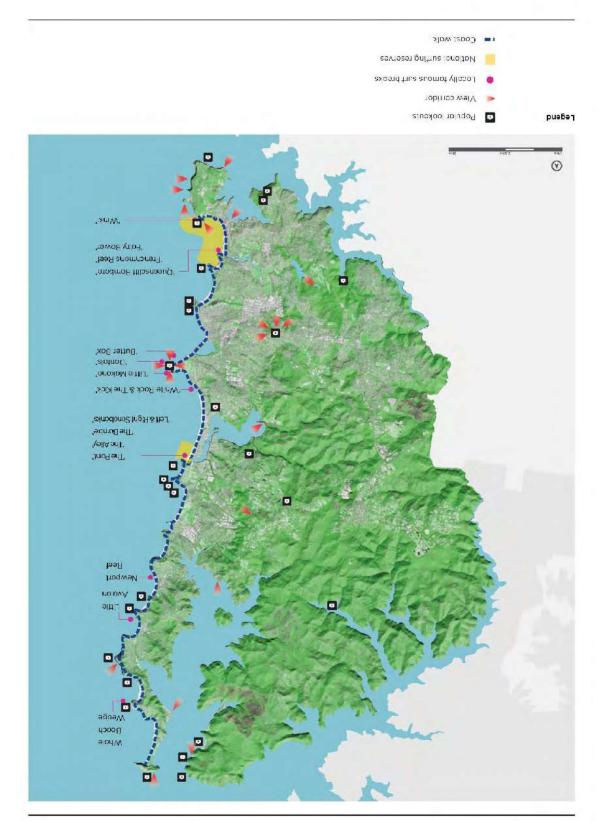
- protecting iconic and valued places natural and scenic beauty;
- centres through access points to scenic landscape views and explore opportunities to open up landscapes and connect places of significance; and
- ð enhances and incorporates significant scenic landscapes in a way that creates new opportunities for existing places of ensuring new development is visually subservient to scenic importance. •

The scenic landscapes map over page, jointly prepared by Meridian landscapes of the LGA, including lookouts, coastal landmarks and Urban and Northern Beaches Council, highlights scenic and cultural high-level view corridors.

The Headlands Source: Northern Beaches Council







Scenic and cultural londscopes of the LGA, including lookouts, coostal londmarks and high-level view corridors?



This priority focuses the role of the urban 'green grid' including the importance of shade and shelter, building resilience to the urban heat island effect (higher temperatures caused by concentrations of materials which store or reflect heat – like concrete and glass). The aim is to improve connections to green spaces, increase the urban tree canopy and green cover and integrating water features into spaces. In recent years the focus has changed from building over or converting 'green' and 'blue' spaces (land and water) to reinstating natural areas. Recognising the important environmental services these connected networks play in the function of cities is paramount. These networks are assets and are comprised of narrow corridors, streetscapes, drainage lines, and connecting links between significant water bodies or green spaces.

Creating a greener urban environment delivers a range of benefits including the provision of shade and shelter and local habitat. It cools local environments, reduces the urban heat island effect, improves air quality and acts as a carbon sink. It encourages people to walk and spend time outdoors and protects us from the sun's rays. Shady streets enhance visitor experience, reduce energy costs and add appeal for retail, business and office developments. Water quality can be improved before reaching water courses and maintenance costs are reduced or transferred to natural processes when water-sensitive urban design principles are employed. This green network plays a critical role in liveability. It is just as important as roads, car parks, water and buildings.

Our Challenge

The challenge is to shift gears and think of the tree canopy, streetscapes, links and connections of green infrastructure as a natural network.

A healthy connected green grid means healthy and cool communities...

northern beaches council



Page 20

September 2019.

Expanding the urban tree canopy especially in areas with less tree canopy coverage than the rest of the Northern Beaches and in the intensely urban spaces is vital to create places for people. The tree coverage enjoyed by the residents of the Northern Beaches is highly valued in contributing to the character, standard of living, and amenity of the area. While the Northern Beaches is expected to grow, amenity will always be a fundamental characteristic of the area. The Northern Beaches has one of the highest urban tree canopy coverages in Sydney. The NSW Government's 2016 data indicates the Northern Beaches' has an Urban Tree Canopy coverage of 39%. The 2016 data suggests that within business, commercial and industrial zones there is an average urban tree canopy coverage of 11%, with some areas as low as 4%. Within residential zones (R1, R2 and R3), the average tree canopy cover is 32% and can range from 11% - 48% (NSW Government's 2016 tree canopy data). Council is in the process of collecting local data.

or collecting tocal take.

A shady and welcoming environment on Park Street, Mona Vale Source: Meridian Urban

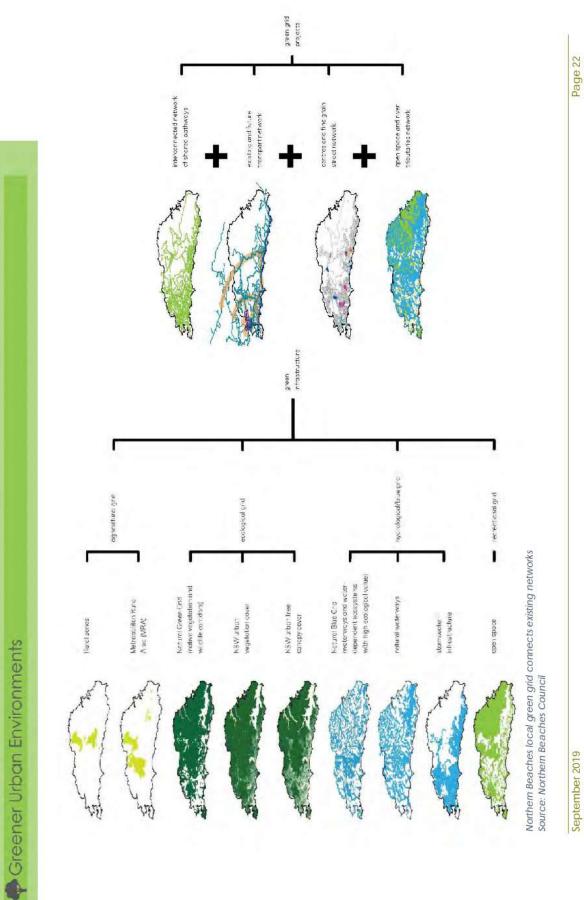
Strategic centres and employment hubs of Mona Vale, Brookvale, Dee Why and Frenchs Forest and along major entry and transport routes of Pittwater Road, some parts of Barrenjoey Road and Condamine Street are particularly susceptible to the urban heat island effect. The diagram on the following page illustrates the Northern Beaches local green grid, green infrastructure and green grid projects. Local green grid projects will connect with Greater Sydney Green Grid projects. This work will be underpinned by the Government Architect NSW's Greener Places Policy, which aims to reconceptualise waterways as an infrastructure asset and connectors that bind communities together.







ATTACHMENT 2 Technical Studies ITEM NO. 12.1 - 24 SEPTEMBER 2019





Our Opportunities

Communities should be sensitively designed within the natural environment to build resilience to heat and allow natural processes help manage the urban environment. In addition, the vision is to create welcoming places for people. Shade is integral to this vision. The Greater Sydney Green Grid concept is visionary and displays solid principles about the importance of open space, landscape character and natural processes that benefit cities and towns. This concept would benefit from a local context and application which complements local strategies and visions.

The resulting advantages which emerge with striving for a greener urban environment include

- combatting the urban heat island effect with natural shade and cooling;
- assisting storm water quality, drainage and absorption;
- contributing to improved air quality;
- increasing habitat and safe corridors for wildlife;
- increasing resilience to climate change; and
- enhancing opportunities for environmental awareness and social activity through bush care and community gardens.

The Northern Beaches urban tree canopy includes a variety of tree types, including local and native species, deciduous and evergreens, found on tree-lined streets, urban bushland and private land.

"Green space is the hallmark of liveability in urban areas... promot[ing] sustainable development while maximising quality of life"

Source: Sydney Green Grid Project



Narrabeen Lagoon, multi-use path lined with mature native species Source: Meridian Urban

Page 23

ATTACHMENT 2

Technical Studies

ITEM NO. 12.1 - 24 SEPTEMBER 2019







The urban tree canopy is a new challenge which will be met through protecting existing shade and enhancing contributing spaces.

Priorities in Practice

The focus for planning is to ensure that green spaces, shade, natural processes and contributions to the urban tree canopy are made at every opportunity. Actions Council will consider for the new planning framework include;

- exploring options for repurposing streets to improve the environment for walking and cycling and ensure street design standards has space for the tree canopy and landscaping and encouraging street level activities;
- encouraging innovative urban design options which maximise green space and planting, including green roofs and green walls and create places for people in every aspect of new projects;
- including the tree canopy in the mapped network of green infrastructure for incorporation into planning instruments and policy using principles from the Sydney Green Grid;
- ensuring green grids are viewed as asset networks to be integrated with broader planning outcomes;
- applying protections where appropriate to existing mature trees to be mapped and identified in the planning instruments;
- ensuring the dual purpose of land: for example, waterways and bicycle and walking path corridors is enabled in the planning framework;
- improving tree health and species diversity through policy guidance;
- considering purchase of strategic land parcels;

- considering a policy to allow or require contributions to nearby greenspace where a site does not provide the opportunity internally;
- using offsetting to reduce net tree loss across the region where appropriate;
- introducing locally specific urban design guidelines which deliver a higher standard of development; greener urban environments, including minimum standards;
- introducing green roofs or green walls on urban rooftops as functional open space;
- improving levels of tree planting to have a cooling effect on the environment and reducing the urban heat island effect;
- ensuring communities have adequate access and proximity to enjoy the outdoors especially around centres; and
- promoting connection across and through the streetscape and land uses, to important local features and services at street scale.



Australia has committed to limit the increase in global average temperature to well below 2°C, striving for 1.5°C. The need to achieve emissions reduction targets through land use planning is initiated in the `Greater Sydney Region Plan: A Metropolis of Three Cities' and echoed in the North District Plan. Priorities are for reduction and recycling for all resources: energy, waste and water.

Baseline carbon emissions and water use provide an evidence base to monitor progress. This priority aims to reduce carbon emissions, improve energy efficiency and achieve reductions in waste to establish the Northern Beaches as an exemplar sustainable and energy, water and waste efficient community contributing meaningfully to the circular economy.

Fundamentally, land use planning shapes the efficiency of communities: how people move, connect, work, and recreate and how the community consumes resources. This ability to move is reflected in transport modes, usage and continued reliance on cars. Over 60% of the region's journeys to work are in cars, this is even though 52% of residents work in the area they live.

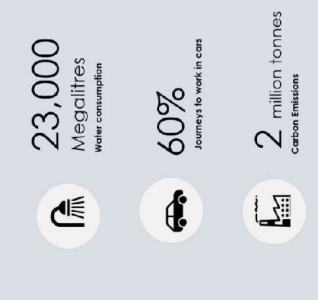
Our Challenges

The Northern Beaches community aspires to be leaders in managing resources sustainably, ensuring that development improves efficiency in the areas of energy, water and waste on a regional scale along with homes, workplaces, buildings, infrastructure and neighbourhoods. Designing a built environment with a zero-carbon emissions footprint is the challenge.

Average emissions per dwelling are lower in higher density areas in Manly. Dee Why and Narrabeen, assisted by an efficient settlement pattern. Conversely, low density urban development contributes to higher emissions through grater resource use and reliance on private vehicles.

The Northern Beaches in 2016/2017...

northern beaches council



🟠 Efficiency

The push for a carbon neutral region can be delivered through:

- a low carbon focus;
- a water and waste-wise community;
- a sustainable built form;
- an efficient settlement pattern; and
- a connected community with transport options.

The settlement pattern must foster opportunities for housing diversity in walkable suburbs with accessible services to enable less reliance on private vehicles and reducing the amount of space used for parking, lowering living costs and emissions, improving health and liveability. Effective settlement design delivers the greatest opportunity for sustainable living across all targeted efficiency areas.

"Make Northern Beaches a shining example of how to transition to a truly sustainable community"

Source: Shape 2028 p. 24

Our Opportunities

framework. The way our cities are planned is an integral part of the carbon emissions profile. Actions will, connect vital services and jobs to reduce car dependencies and enhance the community with Opportunities to meet the challenge arise in the new planning sustainability at the forefront. Land use planning will help deliver a lowcarbon community.

New development must foster opportunities for housing diversity in walkable suburbs with accessible services to enable less reliance on

private vehicles and reducing valuable space used for parking, lowering living costs and emissions, improving health and liveability.



Community recycling at the Northern Beaches Source: Northern Beaches Council

Priorities in Practice

Areas that are subject to change provide the greatest potential for improved building sustainability performance. Some of the tools and mechanisms Council will consider in the planning framework include:

- continuing to advocate for a Green Star Communities rating for Frenchs Forest Planned Precinct;
- are close to service and recreation, promoting active streets elevating the strategic centres as preferred residential areas by enhancing liveability in a range of housing choices that and walkability; •
- enabling renewable energy options at all scales through collaboration and planning or building regulation; •
- incentivising innovative ways to reduce waste, water and energy consumption in new projects and buildings; •





"Council aspires to be leaders in managing our resources sustainably and for the long term to ensure that development is balanced with our lifestyle and environment".

Source: Shape 2028

- mandating the highest possible sustainability standards in new building work;
- supporting the target of net zero emission buildings by 2030;
- supporting smart technologies and infrastructure;
- integrating transport and land use planning for an efficient settlement pattern;
- continuing to enhance and require connected communities with adequate walking, cycling and end-of-trip facilities;
- committing to compact centres with diverse housing choice which delivers efficient living and contributes to energy reduction targets;
- create places for people, new residents, business and activities which promote walkability and access;
- plan for a connected settlement pattern of physical and visual links between people, places and environments for a sustainable region;
- ensuring new developments are designed around and incorporate mobility infrastructure, e.g. bus stops, shelters, bike racks, pathways, signage and enable all types of connections; and

 incorporating sustainable and environmental building designs such as urban green rooftops, sustainable drainage and solar energy into larger developments.



A B-Line Bus express into the city Source: Northern Beaches Council



The Northern Beaches is exposed to significant natural hazard risk with a track record of events, including the 1966 storms; 1974 coastal erosion; 1994 bushfires impacting Terrey Hills, Ingleside and Elanora Heights; significant flash flooding events and the 2016 east coast low which brought heavy rainfall and coastal erosion. These natural occurrences will continue as our climate changes and are likely to intensify.

The proximity of urban areas to hazards such as bush fire prone vegetation, waterways and coastal processes places people at some of the highest levels of risk in the Sydney area and wider NSW and Australian context. The region's exposure will increase over time with population increase. However, how vulnerable the community becomes should be a focus now.

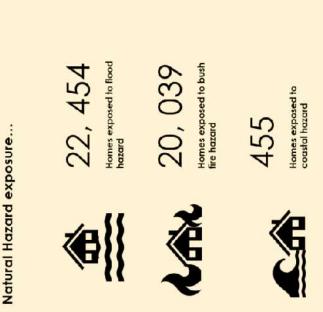
Our Challenges

The challenge for planning is to build a resilient Northern Beaches, by adopting a risk-based approach to planning. There is a significant role for land use planning in providing effective protection to existing urban areas, whilst also ensuring that new communities are not exposed to unacceptable levels of risk.

A resilient community and environment can 'bounce forward' and recover from shocks of natural disaster, and indeed transform to be ready for unforeseen events. The role of the built and natural environments to assist in recovery and resilience cannot be understated. The ability to embed resilience in land use planning enables infrastructure and building design and construction to be planned to be more resistant to future disaster events. Together they foster connected, resourceful, diverse and sustainable communities, essential for enduring resilience.

Our Opportunities

There are a range of options in the land use planning toolbox to enhance resilience to climatic and weather events. Much direction stems from work on a global, national and regional level.



Page 28

September 2019

nternationally, the 'Sendai Framework', the '2018 United National Disaster Risk Reduction Ulaanbaatar Declaration', informed the drafting of the 'National Strategy for Disaster Resilience' and the 'National Disaster Risk Reduction Framework'.

The national policy identifies a substantial role for land use planning, strategy and controls in minimising the potential impact of hazards on communities. This position is subsequently reflected by the 'Greater Sydney Region Plan: A Metropolis of Three Cities' as well as the 'North District Plan'. Collectively the current policy at all levels provide clear frameworks that help develop pathways for localised action'. Through shared responsibility across the community and in conjunction with resilience measures such as natural land management, emergency management, structural treatment, community preparation and business continuity, collective ability to endure, withstand and 'bounce forward' from natural hazard shocks can be enhanced.



Beach erosion in 1966 at Narrabeen Source: Northern Beaches Council

The opportunity to meet the challenge arises in a new planning framework for the Northern Beaches. The new framework can embed resilience principles, objectives and practices as part of sustainable development approaches. The principles aim to protect the community and environment from existing and increasing effects of natural hazards, to ensure desired social, economic and environmental aspirations set out in 'Shape 2028: Northern Beaches Community Strategic Plan 2018-2018' are achieved.

"Land use planning is perhaps the most potent policy lever for influencing the level of future natural disaster risk'

Source: Productivity Commission Report into Natural Disaster Funding Arrangements, 2014

Priorities in Practice

The direct and indirect social, economic and environmental costs (both tangible and intangible) can be partially treated by effective planning policies, strategies and controls. Building regulation responses provide opportunities to manage how communities live with and adapt to continuously changing circumstances. In investigating opportunities to enhance resilience across the Northern Beaches, Council may consider:

- ensuring growth does not occur in places where infrastructure is limited and protection from natural hazards where risk is intolerable through stronger development controls;
- embedding climate risk and natural hazard risk management, prioritising safety of life and property into planning policy, strategy and development controls;

Page 29

northern



- increasing setbacks from high risk natural hazard areas;
- investing in mapping and modelling to identify risk and exposure where required to inform decision making;
- undertaking risk-based assessments for various hazards (flooding, bushfire, coastal, severe storm, heatwave, landslip) to better understand risk and exposure;
- formulating a localised policy framework for disaster risk reduction which is specific to the risk context of the Northern Beaches and considers all land use planning treatment approaches (do nothing, protect, accommodate, retreat (Productivity Commission 2012));
- deriving a risk-informed settlement pattern to guide growth to lower-risk areas, avoiding intensification in higher risk locations; and
- implementing key land use management actions such as protection of key habitats, regeneration of bushland sites as well as works to maintain coastal environments such as beaches and headlands.

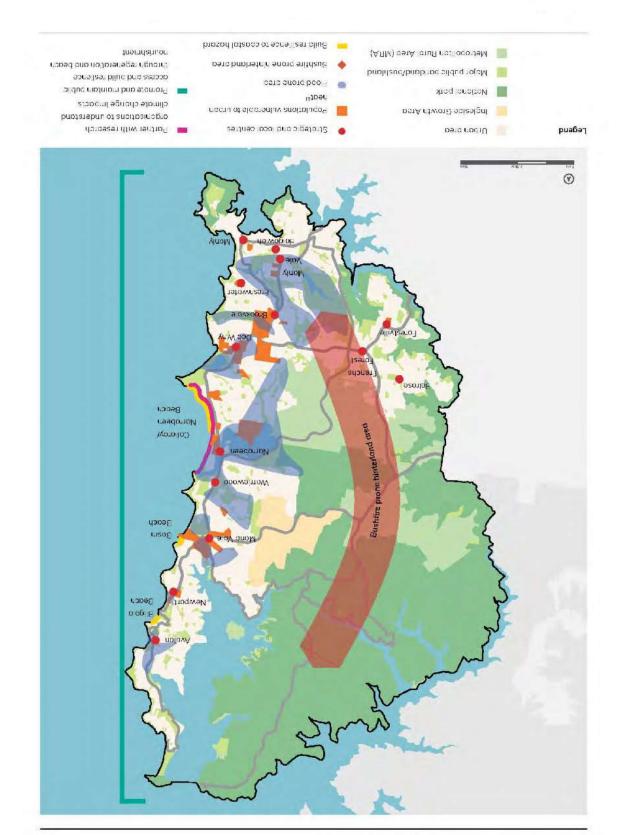
The resilience map over page illustrates at a strategic level, those areas of the Northern Beaches where resilience to natural hazard events may be a particular focus. This includes hazards such as flood, bushfire, coastal impacts (storm surge, coastal erosion, etc), as well as exposure to urban heat and climate-related events.

Bushfire Source: Northern Beaches Council









Northern Seaches resilience to natural hazards and climate change

This background paper highlights the multitude of environmental opportunities available to the Northern Beaches. We know we will grow, as all desirable places do. How we manage this growth to protect our lifestyle aspirations whilst maintaining our valued environmental assets is critical in preserving the fabric of our existing community and the reasons we chose to live in this very special part of Sydney.

Some of our opportunities are more sustainable than others, having regard to climate change and resilience, transportation and mobility, cost of infrastructure and importantly, our impact on our surrounding landscape and its intrinsic ecological and lifestyle value. This may mean that we, as stewards of our landscape, must consider the trade-offs we are willing to make to ensure we protect, connect, enhance our environmental assets, and celebrate new and existing opportunities to enjoy all the Northern Beaches has to offer. To achieve this, as a community we must take the time to get engaged in the process of formulating our new planning framework. It is our opportunity to shape the agenda of Northern Beaches and our community over the next 20 years. Peppermint Angophora forest Source: Northern Beaches Council











Community and Stakeholder Engagement Report

Towards 2040 (Local Strategic Planning Statement - Stages 3 of 4)

August 2019

Contents

1.	Summary2
1.1.	Engagement Process2
1.2.	Key Insights
1.3.	Participant Snapshot5
1.4.	Acknowledgements
2.	Background
3.	Engagement Purpose and Objectives
4.	Engagement Methodology6
4.1	Summary of Key Activities and Results7
4.1.1	Stage One: Community awareness raising and information sharing7
4.1.2	Stage Two: Developing ideas and parameters8
4.1.3	Stage Three: Testing and refining priorities9
4.1.4	Consolidated community feedback9
4.1.5	Stage Four: Public exhibition of draft LSPS (pending)13
4.2	Engaging with Hard to Reach Communities14
5.	Data Limitations14
6.	Conclusion15
7.	Next Steps15
8.	Appendices16
8.1	Appendix One: Northern Beaches community engagement analysis report16
8.2	Appendix Two: Northern Beaches Placescore LSPS insights report
8.3	Appendix Three: Perceptions survey results
8.4	Appendix Four: Workshop and focus group results report
8.5	Appendix Five: Draft priorities survey results146



1. Summary

This report has been prepared as part of the preparation of a Local Strategic Planning Statement (LSPS) for Northern Beaches Council and outlines the process and results of an engagement program undertaken together with the local community and key stakeholders.

Council's engagement process in developing the draft LSPS, *Towards 2040*, is ongoing and has used a range of techniques to engage the community and provide insights into the key issues and priorities for the future of the LGA. The feedback obtained from the community has been used to shape *Towards 2040* and help to set its 20-year vision for land use, characteristics and strategic planning.

This document outlines community and stakeholder engagement conducted as part of Planning Our Sustainable Future, explicitly *Towards 2040*. The consultation period documented is from January to June 2019 and outlines engagement conducted as part of stages one, two and three (of four¹).

The reports' content reflects the insights² of over 600 participating community members and stakeholders, including government, business, academia, community services and organisations, and the public. The report also provides analysis on community feedback from all strategic level engagements since Council amalgamation in 2016.

1.1. Engagement Process³

Engagement was about asking questions, exploring future priorities and leveraging community feedback, including information collected over the past three years⁴. The process achieved this by providing consistent and accessible information, and by asking a uniform set of questions of all participants across activities.

The process also acknowledged that Council has consulted with the community on many strategic, future focused projects, beginning with the Community Strategic Plan in 2016. In response, engagement included substantial qualitative and quantitative analysis of community feedback through the lens of the NSW Government's LSPS Guidelines⁵.

Operationally, engagement was divided into four stages:

- 1. Community awareness raising and information sharing.
- 2. Developing ideas and parameters.
- 3. Testing and refining priorities.
- 4. Public exhibition of draft LSPS (pending).

The outcomes⁶ of this process have been used to inform the content development of the Northern Beaches Council's draft LSPS, *Towards 2040*. Stages one, two and three have worked with the community to ideate, check, validate and explore areas of action for the LGA's future.

⁶ Results provide responses across a spectrum of demographics, expertise, experience and understanding of the LGA.



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

¹ A separate engagement report on stage four public exhibition results will be developed.

² Community and stakeholder views contained in this report do not necessarily reflect the views of the Northern Beaches Council or indicate a commitment to a particular course of action.

³ The engagement process is guided by Council's Community Engagement Policy.

⁴ A documented engagement methodology is outlined in the 'Towards 2040 Community and Stakeholder Engagement Plan (Dec 2018)'.

⁵ See appendix one 'Northern Beaches Community Engagement Analysis'.





1.2. Key Insights

The feedback, provided in various forms - from ideas on post-it notes, drawings and recordings of discussions - was received from the community through methods including workshops, focus groups, surveys, community group briefings, analysis, meetings with target groups, social media, and in conversation with Council staff.

In bringing all these results together, insights emerged, which aligned with CSP community feedback:

You said	We heard	How Towards 2040 responds
Be a leader in sustainability	Council has a unique role in our community and the community expect high quality and effective leadership in planning for the future. The community aspire for this Council and area to be a leader and champion in something we can all be proud.	<i>Towards 2040</i> takes a bold approach in taking a leadership role in sustainability, for example, by requiring sustainability certification for new buildings in growth areas, strategic centres and employment hubs
Protect the environment	The natural environment is a defining feature of this area. It is imperative that we protect and enhance the environment.	Towards 2040 includes eight specific environmental priorities that each contain actions that commit Council to protecting and improving the quality of the environment, for example, partnering with DPIE to implement a risk-based framework for waterway health. These priorities are positioned first in the document
Embrace technology	The world is moving at a rapid pace, and there are technological solutions that could improve the way we live, work and play. The LGA should embrace and champion the use of technology.	<i>Towards 2040</i> embraces technology, including utilising smart technologies to improve energy, waste, water and transport efficiencies, for example, by encouraging car share and on-demand transport services
Growth can't outstrip infrastructure	This area is growing, however any growth needs to be supported by appropriate infrastructure to maintain our quality of life, and have minimal environmental impact.	<i>Towards 2040</i> is a commitment to delivering infrastructure together with jobs and housing growth, for example development in strategic and local centres must be considered through precinct- level planning to sequence and fund growth with the provision



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)





You said	We heard	How Towards 2040 responds
		of public transport, open space and other infrastructure for the whole centre.
Protect unique local character	The Northern Beaches is home to many unique places and neighbourhoods. We want to maintain and enhance this into the future.	<i>Towards 2040</i> recognises the importance of local and neighbourhood character by including specific priorities and actions to ensure the Northern Beaches is home to well- designed centres and neighbourhoods that reflect our unique local character and lifestyle, for example, the introduction of design excellence provisions and preparing Place Plans starting with Avalon, Manly and Mona Vale.
Make moving around easier, safer and more sustainable	Currently moving around the Northern Beaches by car, public transport, or active travel is more difficult than it needs to be. We want to improve the way we travel in, out and around our area.	Towards 2040 prioritises active and public transport above expanding private vehicle provisions and includes a vision for delivering four frequent and efficient public transport corridors in and out of the Northern Beaches to help the community become less dependent on their cars and one day having the option of living without a car.





1.3. Participant Snapshot

Demographic data collected from respondents provides a picture of who has engaged with Council on *Towards 2040* and assists in providing deeper context behind emerging themes.

However, it is important to understand the demographic information in this context and not assume that responses conclusively represent the views of any particular demographic groups. Respondents to engagement activities were asked to indicate whether they were a resident, worker or visitor on the Northern Beaches as well as their postcode, age group and gender identity.

The following provides demographic snapshots of respondents who provided their feedback via registering their interest, surveys, workshop and focus group participation. No demographic data was captured for respondents who contributed ideas via email, written submission or target group briefings and meetings.

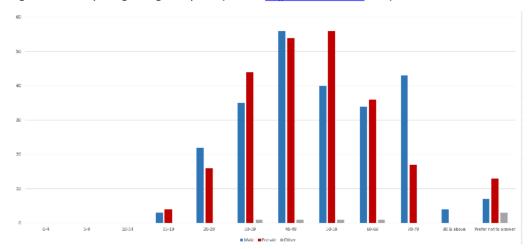


Figure one: Participant age and gender profile (Source: 'Register Your Interest' data)

1.4. Acknowledgements

Thank you to the over 600 Northern Beaches community members and stakeholders across the local government area who shared their time, expertise, views and anecdotes during the engagement period. Also, thank you to the thousands of residents, workers and visitors who have provided comments, feedback and other information since 2016.

We recognise this is one of many engagements that Northern Beaches community members and stakeholders have participated in. We also acknowledge the support of staff throughout the engagement period.

2. Background

Our community is passionate about the Northern Beaches and we want any future development to be in keeping with our lifestyle, environment, local character and changing community needs.

We are taking our four current Local Environmental Plans (LEPs) and Development Control Plans (DCPs) and working with our community and other stakeholders to create one new planning framework.



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



This is our opportunity to create a roadmap for managing the way our area evolves, in a consistent, sustainable and coordinated way, over the next 20 years and beyond.

Our new LEP, and the DCP that supports it, must be consistent with the themes and regional directions set by the Greater Sydney Commission in the North District Plan. It must also respond to what our community told us when we developed our Community Strategic Plan.

We are starting this process by creating a LSPS, called Towards 2040.

This new planning document will outline our future vision, set priorities, and include actions to achieve the priorities and planning principles; confirming our commitment to a sustainable future.

Good planning is all about looking ahead and ensuring we have the housing, infrastructure, services and environment to support our lives now, and for the future. Our aim is to do this while protecting and enriching the characteristics that make living here so special.

3. Engagement Purpose and Objectives

Engagement⁷:

- ensures planning considers community sentiment and feedback
- increases community awareness about the project and its impact(s)
- creates social license to operate
- facilitates a connection and integration between people and organisations
- generates innovative ideas and action
- creates a community of interested stakeholders for Planning Our Sustainable Future on the Northern Beaches.

4. Engagement Methodology

Community and stakeholder engagement for *Towards 2040* was conducted over a six month period, from January to June 2019, and consisted of a series of activities (see section 4.1 below) that provided opportunities and platforms for community and stakeholders to participate.

This report represents what Council has heard as accurately and transparently as possible by using consistent quantitative and qualitative analysis techniques.

The project's impact level one Community and Stakeholder Engagement Plan was devised on a four-stage approach:

- 1. Community awareness raising and information sharing.
- 2. Developing ideas and parameters.
- 3. Testing and refining priorities.
- 4. Public exhibition of draft LSPS (pending).

⁷ Specific project based engagement purpose and objectives are outlined in the 'Towards 2040 Community and Stakeholder Engagement Plan (Dec 2018)'.



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



4.1 Summary of Key Activities and Results

4.1.1 Stage One: Community awareness raising and information sharing

Stage one consisted of gathering and analysing existing data on community priorities as well as informing the community about the LSPS process.

Council acknowledged that many future focused community engagement projects had been conducted over the past three years. To analyse community sentiment within the frame of *Towards 2040*, 47 relevant Council engagement reports were qualitatively analysed and a report provided⁸. The comprehensive 2018 Placescore data set was also revisited and a report provided within the LSPS frame.

All stage one actions:

Stage One Actions	Overview	
Engagement Analysis ⁹	47 strategic Council engagement reports were qualitatively analysed and a report provided that represents thousands of comments and submissions from the past three years. See Appendix One 'Northern Beaches Community Engagement Analysis'.	
Placescore LSPS Insights ¹⁰	Place Score collected 3,198 Town Centre Care Factor Surveys for the Northern Beaches LGA. See Appendix Two 'Northern Beaches Placescore LSPS Insights'.	
Online Platform (<u>Your Say</u> page)	1,543 visits to the projects online consultation page with an average time on-site of 2m 32s.	
Online Platform (<u>Corporate</u>)	827 visits to the projects online page with an average time on-site of 2m 49s.	
Register Your Interest Form	502 individual community members have registered their interest.	
Social Media	Three posts published on <u>Facebook</u> and <u>LinkedIn</u> , total reach of 90,000.	
Information Videos	Two videos produced and distributed. One with <u>NSW</u> <u>Chief Planner</u> has had 358 views. One <u>'Little Locals'</u> <u>interview</u> has had over 29,000 views on social media and over 300 on YouTube.	

8 See Appendix One 'Northern Beaches Community Engagement Analysis'.

¹⁰ Place Scores Town Centre Care Factor data gives Council insights into community place desires and priorities. While not specifically land use based it is valuable in defining experiences and attributes that are important in town centres and main street environments. Between May and July 2018 Place Score collected 3,198 Town Centre surveys for the Northern Beaches LGA. Respondents noted as their top care factors the unique and respected landscape features, cleanliness and maintenance of public spaces and infrastructure, attractive and high quality design materials, public spaces that are attractive and welcoming to a diverse range of people, and legible and safe walking and cycling paths and public transport (further information can be found in the Appendix Two report).



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

⁹ The report concluded that core values identified in the consultations have remained consistent throughout the analysis period. Residents value the unique lifestyle they feel living on the Northern Beaches affords them, and have a keen wish to preserve this in the face of development pressures. The values that underpin this lifestyle are about belonging to a distinctive community, safety, and work life balance. Residents strongly value the community in which they live. This includes the friendliness of people, the social life in the area and the village feel the area has. Concern about development is voiced in nearly all consultations. The impact on transport, traffic congestion, population growth, housing affordability and the environment are constant themes. Fear of change is the fear of loss of what community has now and a sense of not having any control. Whilst many accept growth is "inevitable", community argue strongly for development to be controlled, and infrastructure provided to support growth. While negative sentiments may be expressed about the impact of development and other issues, there is also great enthusiasm for initiatives that build community, cultural and lifestyle opportunities (further information can be found in the Appendix One report).



Stage One Actions	Overview
Traditional Media	13 advertisements were published during the engagement period in the Manly Daily, Pittwater Life and Peninsula Living. The Pittwater Life produced one article. Two media briefings were also conducted.
EDMs	Eight direct emails and inclusions in the Council Community Engagement Newsletter and E-News during the consultation period. Distributed to over 80,000 email addresses.
Webinars	One <u>webinar</u> was produced and distributed. Views to date: 899.
Email comments	29 mail comments and questions were received.
Other	Inclusion in Mayors message in Manly Daily.
	News item on the Northern Beaches Council website.
	Distribution of information booklets to service centres.
	Banners on display in service centres.

4.1.2 Stage Two: Developing ideas and parameters

Council sought to gain feedback on what sort of challenges our area faces and what the desired outcomes would be when addressing these. In order to make feedback meaningful and specific within the time constraints posed by LSPS delivery, content centred on the themes present in the Council's adopted <u>Community Strategic Plan</u>.

All stage two actions:

Stage Two Actions	Overview
Survey (Perceptions) ¹¹	One survey was facilitated during this stage, with a total of 172 completions (completion rate of 82%).
Strategic Reference Group Workshop ¹²	40 community members from the six SRGs participated in an <u>interactive workshop</u> to generate information to inform developing a vision and the drafting of priorities. Further information can be found in the Appendix Four report.
Community group and external stakeholder briefings	Ten community groups and group clusters, and external stakeholder were met to discuss challenges and priorities.

¹¹ Survey completion demographics is reflective of the population structure of the Northern Beaches, and those community members that registered their interest in the project. In response to question 1, the highest ranked characteristic making the Northern Beaches and local area an amazing place to live was 'high quality bushland, beaches and waterways'. This characteristic was deemed 'very important' by 82.2% of respondents, the highest ranked out of all the options. Similarly, in response to question 2 the challenge of 'improving the health of waterways, bushland, beaches and biodiversity' was deemed as 'very important' by 89% of respondents, again the highest ranked out of all the options (further information can be found in the Appendix Three results).

¹² On 18 Feb 2019, representatives from the Northern Beaches' Strategic Reference Groups gathered at the Tramshed, Narrabeen to workshop the development of Council's LSPS (further information can be found in the Appendix Four report).



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)





4.1.3 Stage Three: Testing and refining priorities

As an overall vision and priorities were drafted, it was important to examine them with community and stakeholders. Stage three allowed Council to test that the draft content matched feedback, and discuss, learn and modify draft priorities.

All stage three actions:

Stage Three Actions	Overview
Survey (Draft Priorities) ¹³	One survey was facilitated during this stage, with a total of 245 completions (completion rate of 51%). ¹⁴
Focus Group Discussions ¹⁵	Over 50 community members (randomly selected from the 500 registered) participated in seven focus groups across the five wards. One youth and one Culturally and Linguistically Diverse focus groups were facilitated.
SRG presentations	Three presentations were facilitated across three months to discuss and test the draft priorities with community members and Councillors.

4.1.4 Consolidated community feedback

Stage one and two engagement helped Council identify key community priorities and concerns that could be further explored and developed in more tailored engagement opportunities during stage three.

Analysis of consultation responses indicated feedback themes disaggregated by direction:

Direction	Feedback	Towards 2040
Landscape	Very strong support for bold, aspirational and strong environmental priorities. Our community want to be a leader in sustainability. The community see the environment as the most important feature of the Northern Beaches.	<i>Towards 2040</i> includes priorities for the protection and enhancement of our environment, including coast and waterways, bushland and biodiversity, scenic and cultural landscapes, and our Metropolitan Rural Area. Additionally, priorities have been included to green our urban

¹³ Survey results provided evidence for the redrafting of the LSPS priorities. For example, from the preliminary 39 priorities drafted, community feedback supported the refinement to 30 as presented in the draft LSPS (further information can be found in the Appendix 5 results). The survey provided respondents with the option of reviewing all of the priorities or only those of interest. Respondents ranked their level of support via Likert-scale from 'strongly oppose' to 'strongly favour'.

¹⁴ The draft priorities with the highest level of support and lowest level of opposition are in relation to the environment (priorities 30-39) and active transit (Priority 15). Priority 30 (healthy and valued coast and waterways) had the highest level of support at 90% strongly in favour of the priority. Priority 31 (Protected and enhanced bushland and biodiversity') had the second highest level of support with 89% strongly in favour of the priority. Priority 14 (Frequent and efficient north/south public transport to North Sydney, and Sydney CBD including via the Beaches Link Tunnel') had the highest level of opposition at 17% strongly opposed. In contrast, 43% of respondents strongly favoured this Priority. Comments on Priority 14 indicate while many respondents are in favour of improved public transport, they are not necessarily in favour of the Tunnel and/or tying the provision of these services to the Tunnel. Priority 1 (infrastructure delivered together with jobs and housing growth) was the second most opposed priority at 15% strongly opposed, while 34% strongly favoured the Priority further information can be found in the Appendix Five results).

¹⁵ Focus group participants were presented with key change factors (e.g. changing demographics, climate) that the area is likely to experience over the next 20 years. They were then asked to describe their 20 year vision, which was captured under four themes: 'infrastructure', 'liveability', 'productivity', 'sustainability'. Once their vision had been expressed, the group was shown Council's draft priorities and asked how they could be improved to better capture the group's vision (further information can be found in the Appendix Four report).



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Direction	Feedback	Towards 2040
	The scenic qualities of this area are highly valued. Coastal and bushland biodiversity values are highly prized assets.	environments and deliver high- quality open space.
Efficiency	Support for avoiding urban development that adversely affects the natural environment indicates a preference for growth to occur within current urban areas. Support for the lowering of carbon and waste. Support for adoption of green tech solutions.	<i>Towards 2040</i> includes aspirational targets as well as actions for reducing carbon emissions and managing energy, water and waste more efficiently over the next 20 years.
Resilience	This area should be not only resilient but also reduce our contribution to climate change. Avoid development in areas most affected by the effects of climate change, such as along the coast and in inundation and bushfire prone areas. Our Council should be a leader in adaptation.	<i>Towards 2040</i> includes a priority which seeks to build resilience in the community and natural and built environment and foster connected and sustainable communities that are resilient to natural hazards.
Infrastructure	The community expressed a strong desire for improved infrastructure across the Northern Beaches, especially when planning for growth. The community expect infrastructure development prior to experiencing growth rather than trying 'to play catch up'. Growth should not outstrip infrastructure. While the support for growth is not consistent across the LGA, participants in this process have expressed that any growth that is to occur must be supported by quality infrastructure. Supportive of incorporating technology into new infrastructure and for new infrastructure to be built sustainably and adaptably.	Towards 2040 includes a priority and specific actions for delivering infrastructure together with employment and housing growth. This is in acknowledgement of the need for collaboration at every level of government to ensure that high-quality infrastructure is delivered at the right place and at the right time.





Direction	Feedback	Towards 2040
Collaboration	Desire for Council to take a leadership role in collaborating with state agencies, other councils, the community and other stakeholders in order to achieve positive and high quality outcomes for the Northern Beaches. Stage agencies should not over-ride the needs and wants of Council and the community.	<i>Towards 2040</i> includes a specific priority and action that supports collaborative relationships across all levels of government, our community and stakeholders.
People	Northern Beaches residents are local community focused and support efforts to improve social cohesion and capital. The development of an inclusive, safe and socially connected community received high levels of support. The concept of improved local higher education facilities and options is supported in general. However, reservations remain as to the effect a university campus will have on the existing community and functioning of the area. Arts, creativity and culture are highly valued by the community. The community consider additional and improved community services both in main centres and in smaller places to be important.	<i>Towards 2040</i> includes priorities that support increased local educational opportunities, and planning for community facilities that promote an inclusive, healthy and socially connected community. It also includes priorities that support arts and creativity and genuine engagement with Aboriginal communities.
Housing	While the community support improved housing conditions and stock in principle, some in the community are concerned about the adverse environmental, infrastructural, and social effects of housing growth on the LGA. Community members have placed an emphasis and value on preserving and enhancing local and neighbourhood character, especially in relation to further housing development. Respondents who strongly favoured these priorities in this direction range	While the community has voiced its concern about over- development and out of character development, it has also expressed the desire for the right type of housing and the importance of ageing in place. <i>Towards 2040</i> includes two priorities for housing, these emphasise the need for housing that is affordable, provides greater choice, and is in the right locations. In conjunction with the priorities that seek to deliver great places, <i>Towards 2040</i> can produce quality housing in pace





Direction	Feedback	Towards 2040
	from 39% to 44%, indicating a mixed variety of views across the housing discussion.	with the changing needs of community.
	The community generally support improving the choice in housing, both in typology and look/feel.	
	The community desire high quality architectural and urban design in new developments and especially in relation to areas with increased density.	
	The community desire to have the choices available that cater to their needs throughout the life cycle, in order to live their whole lives in the area.	
Great Places	The community are passionate about the preservation of local and neighbourhood character.	<i>Towards 2040</i> supports enhancing local places through place-based design, design excellence and building on local characteristics. It
	The community expressed a strong desire to preserve the character of the places they call home, and to support the wide diversity of local character across the LGA including local heritage.	also supports protecting and conserving heritage.
	High quality urban and architectural design are valued, especially for new developments or in areas of higher residential density and town centres.	
	The community are passionate about preserving local settler and Aboriginal heritage.	
	Public places should be of high quality design.	
	Public spaces should facilitate and foster meaningful social connections, especially between generations.	
Connectivity	Improving public and active transport facilities/services is highly supported by the local community.	<i>Towards 2040</i> reflects the community's feedback by planning for and delivering transportation and connections that are frequent,
	The community want active travel options to be safe, convenient and realistic.	reliable, sustainable and meet the specific needs of our changing community. It also supports





Direction	Feedback	Towards 2040
	Improving options that reduce adverse environmental effects and congestion received strong support throughout the engagement process.	creating safer environments with improved amenity.
	Ease of movement within and outside the Northern Beaches is considered an important part of making the area a great place to live. This is evident by the 61% of perception survey respondents considering this a very important challenge for Council over the next 20 years.	
	'Safe and convenient walking, cycling and local transport networks' received the highest level of support for any priority not grouped in the Environment direction at 83% strong favour, and 1% strong opposition.	
Jobs and Skills	Council should be supporting start-up businesses, especially in the tech- industry. Support for innovation hubs. There is significant support for co- working and/or remote working facilities. Support for more people living closer to work in order to take advantage of the work-life benefits of this area, and to reduce congestion. Support for more local jobs and additional educational/upskilling opportunities. There is opposition to tourism that is not respectful of the community and the environment.	<i>Towards 2040</i> contains nine priorities that together seek to foster and protect jobs and economic opportunity that reflect the needs of our community. There is a priority for each of the five strategic centres with the acknowledgement that each of these centres functions differently. <i>Towards 2040</i> also includes priorities to plan for and manage the night-time economy and tourism.

4.1.5 Stage Four: Public exhibition of draft LSPS (pending)

Public exhibition of the *Towards 2040*, draft LSPS, is scheduled for 27 September to 10 November 2019. Engagement actions planned include:

comprehensive and accessible online feedback experiences including video, interactive documentation and survey



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



- access to all evidence base and research materials that have informed the draft LSPS including:
 - o Demographic analysis
 - Housing issues and opportunities paper
 - o Employment study background report
 - o Social infrastructure issues and opportunities background paper
 - o Environment background report
 - Community engagement report
- five drop-ins (one per ward)
- five community group briefings (one per ward)
- social media and print media
- receipt of written and email submissions.

4.2 Engaging with Hard to Reach Communities

A key barrier in engaging our 'hard to reach' communities is their lack of access to information or activities. The engagement approach of this project took Council to different groups, rather than expecting communities to come to us. Specifically, youth¹⁶ and the Culturally and Linguistically Diverse (CALD)¹⁷ communities were targeted for engagement.

Working closely with Council liaisons provided the opportunity to engage with key community members and utilise their networks to share information, and increase exposure and awareness of the project and engagement program.

A valuable part of engaging with these communities was establishing both a youth and CALD focus group. Young people and CALD community members were also included in ward focus groups. Key members of the Aboriginal and Torres Strait Islander community were invited to attend any of the 5 ward focus group sessions that suited them.

Staff also presented to the Northern Beaches Multi-Cultural Network and the Northern Beaches Council Youth Advisory Group in February 2019.

5. Data Limitations

In total, over 600 people engaged during the consultation period. While this is not a statistically representative sample of the overall Northern Beaches community, every effort was made to gather feedback from across a broad spectrum of our community, and ensure as balanced a sample as possible across the demographic range.

The themes drawn from these responses provide Council with an emerging picture of community sentiment on the project. By cross-referencing these themes with demographic information, for example age group, postcode and gender, a clearer picture is formed of who in our community may be impacted by the project.

Note: This analysis does not include any 'late' feedback received after the advertised closing date for consultation.

¹⁷ See page 141 for detailed CALD feedback



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

¹⁶ See page 142 for detailed youth feedback



6. Conclusion

The Greater Sydney Commission requires Council to prepare a LSPS that responds to the key themes identified in the North District Plan: Infrastructure and Collaboration, Liveability, Productivity and Sustainability, as informed by community and stakeholder engagement.

Council has taken this opportunity to undertake detailed strategic engagement work and explore community perceptions and priorities of the LGA to support the development of *Towards 2040*. Engagement was undertaken with community and key stakeholders in online and face-to-face contexts between January and June 2019.

The engagement process was tailored to build an understanding of priorities and explore community perceptions and tangible future opportunities. The results reflect that the LGA is currently experiencing change, which needs to be planned for and managed in order to preserve the area's unique appeal. Residents value the lifestyle they feel living on the Northern Beaches affords them, and have a keen wish to preserve this in the face of development pressures.

Feedback collected through the engagement process identified a number of recurring themes as well as novel ideas and perspectives. Results indicate that:

- Council has a unique role in our community and the community expect high quality and effective leadership in planning for the future
- the community aspire for this Council and area to be a leader and champion in something we can all be proud of
- the natural environment is a defining feature of the area. It is imperative that we protect and enhance the environment
- the world is moving at a rapid pace, and there are technological solutions that could improve the way we live, work and play. This area should embrace and champion the use of technology
- the area is growing, however any growth needs to be supported by the appropriate infrastructure to maintain our quality of life, and have minimal impact on the environment
- the Northern Beaches is home to many unique places and neighbourhoods. We want to maintain and enhance this into the future
- currently moving around the Northern Beaches by car, public transport, or active travel is
 more difficult than it needs to be. We want to improve the way we travel in, out and
 around our area.

Council is thankful to have a community that is passionate about the kind of future that it sees for the area. In drafting *Towards 2040*, we have endeavoured to capture what is important to our community and be bold in achieving this shared vision.

7. Next Steps

- Draft Towards 2040 on public exhibition.
- Public exhibition feedback reviewed, analysed and considered.
- Draft Towards 2040 to GSC / DPIE for preliminary review and technical health check.
- Towards 2040 submitted to GSC LSPS Assurance Panel.
- Towards 2040 'making' by Council completed by 31 March 2020.



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



8. Appendices

8.1 Appendix One: Northern Beaches community engagement analysis report

Northern Beaches Community Engagement Analysis

DR JANNET PENDLETON JUNE 2019



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



TABLE OF CONTENTS

Table of Contents

Introduction	5
METHODOLOGY	5
Priority Areas	6
LANDSCAPE	7
Coasts and waterways	7
Bushlands	7
Natural and built environment	8
Rural settings	8
Offshore communities	9
Urban tree canopy	9
Open space	9
INFRASTRUCTURE	10
A growing population	10
HOUSING	11
Housing diversity	11
Affordable housing	12
Ingleside	12
JOBS AND SKILLS	14
Strengthening strategic centres	14
Skills-based training and job diversity	15
Innovative business environments	15
Tourism	16
Night time economy	17
Industrial/employment lands	17
Frenchs Forest	17

2 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



TABLE OF CONTENTS

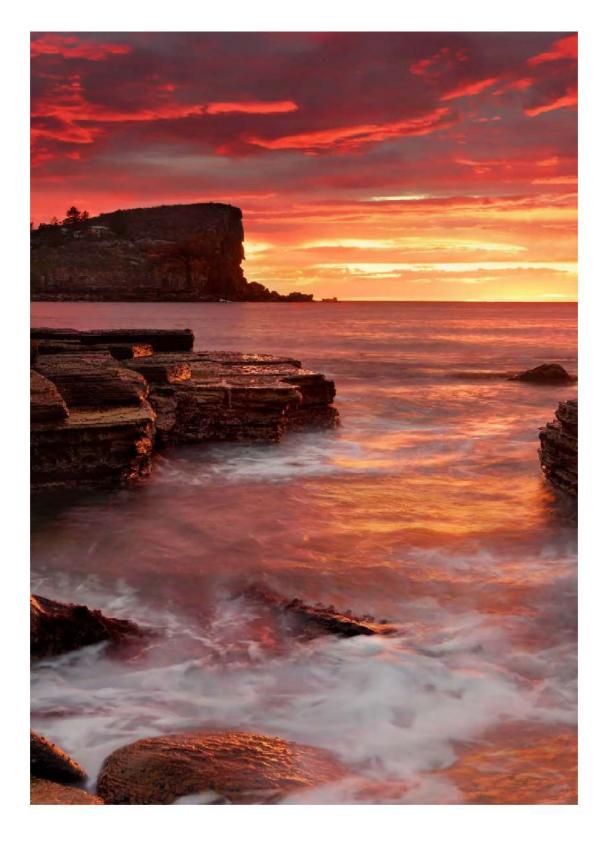
PEOPLE
Access to higher education
Community hubs
Community services
Safe and inclusive communities
Aboriginal heritage
Recreation and open spaces
Arts and creativity
PLACES
Character and lifestyle
Local and neighbourhood centres
Respecting heritage
CONNECTIVITY
Public transport
Active travel
Beaches Link Tunnel
Freight
Road network
Alternate transport models
Mass transit
EFFICIENCY
Environmental sustainability
RESILIENCY
Natural hazards and pollution
Conclusion
Appendix 1 Project List
ADDEHUIX I FTOIECLEIST 38

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 3



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)









INTRODUCTION

Introduction

The purpose of this report is to provide an analysis of community sentiment trends identified in community engagement undertaken by Northern Beaches Council from 2016 to 2019. The results are presented within the framework of Towards 2040 and reflect community feedback on key priorities and challenges.

METHODOLOGY

This report presents a qualitative analysis of 47 community engagement reports produced for Northern Beaches. Council between 2016 and 2018. These consultations deployed a variaty of engagement strategies in response to specific briefs, ranging from overall strategic planning to specific regional or issue consultations. The information that the reports present vary in depth of analysis, the nature of the demographics and other quantitative measures and the way that participant feedback is reported. This is not to imply any variation in the quality of the reports, but rather to acknowledge that they were commissioned for different purposes.

Reports were thematically coded to the priority areas using NVvo qualitative analysis software, which is useful for dealing with large quantities of unstructured date such as this. The information coded included the analysis sections from the reports, paraphrased summaries of community sentiment and verbatim comments from participants. The illustrative quotations in the present report are verbatim comments from residents.

A common strategy in qualitative enalysis is to quantify the data to reveal community priorities, and establish the significance of differing themes and issues and the underlying demographic factors that shape thinking. Different priorities and concerns across the local government area (LGA) may be real or may be the result of the methodology and focus used during the original consultation. Furthermore, without consistent demographic data, it is difficult to know who is tailing and how many times they may have hed their say on a topic. For these reasons, the terminology used in his report does not imply any quantitative summation of the themes described.

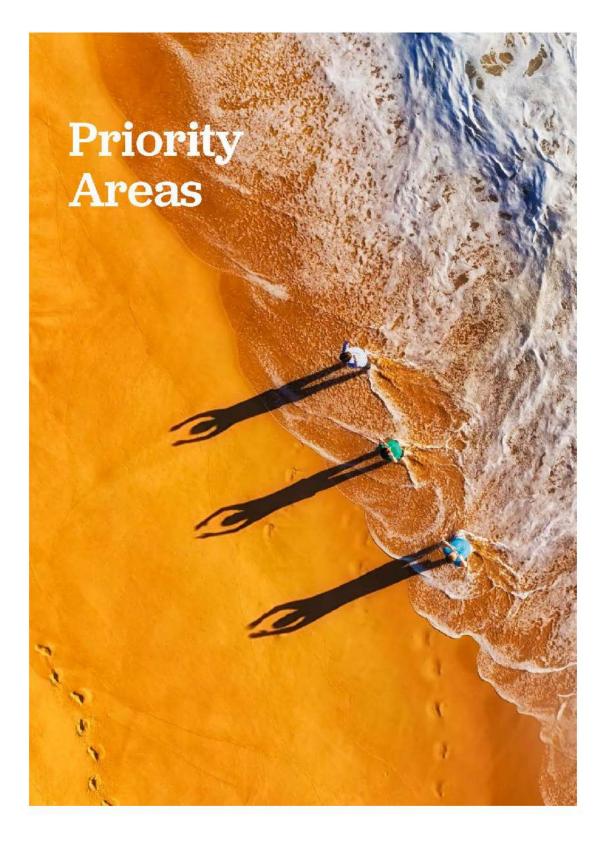
Depth of comment on specific issues is related to targeted engagement on a particular project; for example, there is more content on Avalon and Mone Vale than other areas. It is also at a point in time, so the engagement on Long Reef. Surf Lifesaving Club reflects community feedback at that time on those plans. That said, the volume of the data obtained allowed for consistent themes to be identified and, in bringing these together, an overall ploture of community feeling on these issues emerged.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 5



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)









PRORIDY AREAS

Landscape

Coasts and waterways

Residents consider the maintenance of beaches, headlands and rock pools and managing and protecting creeks, lagoons and waterways to be issues of high importance.

FLOOD AND STORM WATER

People are very concerned about the management of waterways and flooding. In 2019, comments were angry about the perceived failure of the Council to open the lake and, thereby, svoid subsequent flooding, with there being a need for more effective flood mitigation strategies.

PROTECTION OF LAGOONS AND WATERWAYS

Catchment areas should be protected, bush regenerated and lagoon waiks provided around the Northern Beaches (e.g. at Dee Why). Requests were mode for stabilisation plantings along beachfront areas by planting gress, shrubs and trees on beach front sandbanks and concerns expressed about sectimentation of the lake.

How will beaches, natural parks etc. be sustained with increasing population, people exercising, unleased dogs etc.?

There were comments about the community valuing and protecting the unique waterway of Pittwater including catchments. Manly Dam was mentioned consistently throughout the comments, as being a favourite recreational place. *Look at ways to better protect Manly Dam Catchment,* which is an amazing haven so close to city. Some were concerned about the impact that the Beaches Tunnel Link will have on the Many Dam Reserve, which must be considered in planning, e.g. effects on catchment, bushiend and water quality. Good recreational facilities are important to sustain a growing community, e.g. parkiands, Narrabeen Lake, Manly Dam, Manly Creek, bush/forest areas, and beeches and headlands. Trees should be maintained to continue the role of the Northern Beaches as the "lungs" of Sydney (e.g. by creating new national parks in Manly Dam and Oxford Fails Valley). Some comments were related to the need to protect these assets from development, "Weed to protect our breachore in its natural state or for recreational use, not development".

Beach cleanliness was identified as an important factor in an oyment and deserved protection, especially in summer with high visitor numbers.

Bushlands

Comments reiterated the vital importance of upholding the community's value of the natural environment and open space. As with coast and waterways, the bush is very important and highly valued by the majority of people and requires protection and sustainability strategies. There is a strong element of stewardship, 'the objective should be to leave the natural environment in better condition at the end of fer years.' This is very strongly ted to quality of life, which is achieved by respecting the natural environment and its importance for community living, working and recreation.

Overail, clean liness was important, with a range of strategies, proposed to reduce litter and encourage environmental sustainability.

Protection of non-urban land and bushland is a key priority, for example, in Narrabeon Lagoon Catchment. Concerns were expressed about developments encroaching into bushland, rather than developing existing urban areas (increasing building heights to allow for the construction of more units). Population growth is seen as a key contributor to environmental impact, with some of this impact balanced by 'community space gardens, good design and interconnectivity in new developments'

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 7



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS

Themes raised in this section include the need for better compliance and monitoring, concerns regarding air pollution, better control of cats and feral animals, and better planning for boundaries between bushlend and new development. Tension was also expressed between natural and accessible spaces:

'If everything is 'maintained' we won't have natural bush; rather, in this instance, we should have 'accessible natural space' (e.g. Through redeveloped bush trails that minimise impact on the environment).'

Balance must be found between sporting facilities, bushland, parks and other oreen spaces. Some suggest that the natural environment would be valued and protected more if it was opened up to low-impact use (such as mountain biking and hiking), with concerns about 'locking up' or prohibition of use.

Natural and built environment

Community members are generally concerned about sustainable population growth and want to minimise impacts. on the natural and built environment (including infrastructure). There are concerns that unique areas of natural heritage will continue to be lost, such as the beaches, particularly from Newport to Palm Beach, the unique natural beauty, biodiversity and the village lifestyle:

'Maintain the reasons why people live here - beautiful environment, clean air and water, abundant vegetation."

The natural environment and unique character of the landscape are of great importance, and there is a great need to preserve and protect these from over-development. The peninsula needs to stay as it is and preserve its environmental natural beauty?

There is a need to retain the design aesthetics of iconic buildings that reflect the unique cultural landscape. A comment was made regarding the design of the new Mona Vale performance space about needing plenty of space around 'it so it's an iconic building and therefore draws people to if'.

'Surf Clubs are iconic in style and in their day reflected coastal architecture of the day."

'North Stevne Surf Club is an iconic building but has not moved into the 21st Century.'

People feel it is important for buildings to blend into or enhance the landscape. The design of the new Long Reef Surf Club was largely supported by the community and their comments on the degree to which it blended into the environment were very positive. However, some comments were made that reflected diskke for the design and materials, considering it overbearing of natural areas.

Rural settings

This was identified after the consideration of environmental opportunities, i.e. protection/retention of rural (non-urban) land for local food supply, plant nurseries and support services. Rural areas form part of a future vision, 2 place with many things to do for all ages, be it around the beaches or up in the rural areas and bushland'

There were specific comments relating to the need to retain the semi-rural setting and environment of Duffys Forest and the existing rural parts of Terrey Hills, and to ensure that the village environment is retained at Terrey Hills. Some residents felt that there should be more recognition of local food security and supply, with the provision of community and market gardens. Non-urban land has values for environmental protection and rural land uses that contribute to sustainability.

8-NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



beaches ounci

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)



PRORITY AREAS

Offshore communities

Offshore and rural residents feel that they receive less. Council services and no access to water/wastewater utilities; e.g. at ingleside, Scotland Island, wastern foreshores. There were only a few specific references to offshore communities over all the reports. Residents of Church Point made comments related to parking and residents being prioritised, access to more ferries and permanent bike stores made available. Scotland Island comments were related to parking, power supply and waste removal.

Urban tree canopy

Loss of trees is an issue of wide concern across all areas. Some respondents blame this on the State Government whereas others blame this on the demands of development.

People are all behind replanting and strategies to compensate for this loss of trees. Importance is placed on using native species across the LGA and to revise the "Maniy tree plan" to support a variety of nstive trees and promote struction diree plantings across the entire area. The community considers it vital to maintain open space areas and native vegetation. Appropriate plantings for native birds and animals, both on private land and around public spaces, should be undertaken to boost the supply of food lost because of increased development.

"The tree cover needs preservation. Give rate reductions for tree cover. Make trees valuable."

Tree cover was also linked to sustainability, with suggestion related to how vegetation might assist in cooling streets in the future to cater for increasing temperatures. There were calls to give trees more protection across the Northern Beaches to ensure parks and carparks have shade, more full trees should be planted as an important habitat for enimals and a widilite management strategy should be developed. *Trees index our community*:

Open space

The importance of open space was a strong theme over the entire consultation period. It is an integral part of the lifestyle of this region, i.e. the value of living in the area and enjoying the outdoors, cafes, active lifestyle, natural and built environment, vibe, city, walkability and the open spaces.

There is widespread agreement across the community that parks and recreation are critical to community wellbeing. Some felt that the area has adequate open space and recreation opportunities, but that they need to be better managed and maintained. Others noted that the high level of demand for active open space and sports fields indicates a need for more open space as the population grows. There were also a number of comments suggesting that sports fields are better maintained than passive open spaces.

Concerns were reised about overdevelopment of urban spaces without a plan for the creation of open spaces also. People see the need for open space to be preserved as undeveloped open space. Thus, there is a need to distinguish high-quality open space.

Open spaces are considered important because 'overcrowded schools need better access to parkland'. Formal spaces, such as Brookvale Oval, do not address the open space needs of the community. There is strong support for green spaces that can be sustainably used (i.e. Warriewood wetlands and Curl Curl dog park are excellent examples of the right behance between accessibility and environmental protection).

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - S



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREA Infrastructure

A growing population

The overwhelming concern is that services and infrastructure are not keeping up with development and that they will not be able to meet the needs of the growing population. The community raised concerns reparding development and its flow-on effects for transport, traffic condestion, population growth and the environment. While many accept growth as being 'inevitable', they would like development to be controlled and adequate infrastructure provided to complement any development. Some doubts were expressed about the ability of the government to balance future infrastructure with crowth:

'No more population growth without infrastructure."

People did not universally endorse the expansion of infrastructure. Some saw potential negative effects on their quality of life and the environment, for example, land clearing for new roads.

In other instances, infrastructure is seen as necessary to strike the balance between access to and protection of the natural environment, for example, footpaths. People spoke about the importance of infrastructure to connect people-better connections for people already living there and the need for existing infrastructure to be used more efficiently.

infrastructure is vital for safety-particularly around schools and near beaches---and in case of an emergency, infrastructure should assist in evacuating the growing population of the Northern Beaches. This was considered a concern in ingleside, where residents in any new development would need to be evacuated by road if there was a bushfire, thus highlighting the inadequacy of the roads in this area.

Comments relating to infrastructure to support recreation and active travel are discussed in greater detail under other priority areas.² These include 'the provision of footpaths, shared paths, safe cycle ways, best-practice on-road cycling infrastructure that connect public facilities, as well as initiatives encouraging young people to ride to school⁹. For recreation, infrastructure is needed so people can use and appreciate green spaces. Tourism promotion should also be supported by better infrastructure to cope with increased demand.

Some business community members observed that the lack of infrastructure has negative impacts on businesses and there should be support for local, specialist iT businesses that can provide the support required for people to work from home, which would reduce the strain on the current infrastructure and transport networks.

Al versalim resident quatalian tapear in tals form

10 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)

See Recreation and open spaces and Active travel
 See Recreation and open spaces and Active Ecological



PRORITY AREAS

PRIORITY AREA Housing

Housing diversity

The need for 'affordable housing' and 'housing affordability' are terms used interchangeably by members of the community, with some confusion between the two concepts. Affordable housing refers to planning provisions for below market-priced housing (e.g. for key workers) and housing affordability refers to the solity of people to buy into the housing market. This distinction is hard to determine in some comments.

THE RIGHT LOCATION

Strong resistance in some areas to increases in density and height were expressed, mostly for the northern and of the LGA. Avaion respondents are very strongly opposed to dense housing. *Stopping the developers putting dense housing in on orea that needs to keep it's beauty*, with concerns about building height also present in Mona Vale. General responses were to maintain similar housing densities in existing suburbs to the current level and no high rises buil beyond Dee Why and around the new nospital site in French's Forest, 'Frear that French's Forest will become tike Chatswood'.

Comments from residents suggested that increased height around the centres and allowance of more lower density development in select areas would enable more development but not at the secrifice of the environment:

'Too much development in our bushland, rather than developing existing urban areas (raising building heights to allow for more units).' By contrast, in the Broolwale engagement on housing, people discussed locating higher density developments near the community health centre, student housing near TAFE, residential areas near Warringah Mall, and more residential housing in industrial areas and close to B-Line stops. Residents called for height control in new residential developments. These all met the objectives of people being able to live, work and shop in the local environment.

LACK OF HOUSING DIVERSITY

Community feedback revealed people looking for wider choices—with a preference for dual occupancy and low-level apartment blocks rather than high rise apartments.

"What I would really like to see is more new townhouses and apartments across the northern beaches – but not at the sacrifice of the environmental areas."

People identified the need for good design in appropriate locations (e.g. the Stockland model with easy access, a gym, shops and parking all at one site). Better housing options could address the delay in downsizing due to young people living with their parents and ensure that downsizing becomes a more attractive option overal. Well designed secondary dwellings/granny flats were also a proposed solution, together with suggestions to provide support services to assist people who choose to live in 'granny flats', providing a 'housing stage' between a large house and a nursing home (e.g. towrhouses).

NORTHERN BEACHES COVMUNITY ENGAGEMENT ANALYSIS - 11



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



HOUSING COSTS

Residents believe house pricing is becoming unaffordable:

'Want to live here because it's my home, but don't think I'll be able to afford to live here when I'm older.'

There are challenges in ensuring young people can stay in the area. Many people are disappointed to think that their children will not be able to remain on the Northern Beaches and enjoy the lifestyle that they value:

'Kids can't afford to live in the area, so move out of the area, no continuity of families in the area anymore.'

Affordable housing

'We do need more affordable housing.'

Residents acknowledge that increased density is required to allow for affordable housing, which would then bring families into the area, and that housing affordability drives diversity.

Affordable housing and affordable rental accommodation are required for inclusive and diverse communities. Some see a need to overcome negative perceptions of affordable housing, possibly using 'key worker accommodation' terminology instead. There are other concerns about affordable housing in undesirable locations, 'i am concerned about the prospect of social housing tenants being housed in offordable housing projects (constructed by social housing providers) located within an industrial area'. Planning should provide access to social housing in every suburb (e.g. by mandating) with designs that provide a housing mix to prevent 'social problems' (e.g. Balgowleh Stockland es a good example of such a housing mix). Some see no apparent attempts to counter increasing housing costs on the northern beaches. One problem identified is smaller affordable rental properties being sold to investors for higher end short-term rentals and holiday accommodation, thus reducing options for the broader demographic in the area. Others ofte community opposition to boarding house accommodation contributing to the problem. Affordable housing requires a faster, cheaper and more sympathetic Council approval processes.

Affordability is important because the Northern Beaches region is losing people to other areas due to the high cost of living and the shortage of jobs; most jobs are in services, which con't pay well.

There is an acknowledged need for affordable housing for key workers, Accommodation should be provided for key workers near their place of work (e.g. The hospital)' and for young people 'I want my children to be able to afford to live here — so we need affordable sustainable housing'.

A young person expressed their concerns for the future, pointing to low paid local jobs and expensive rental accommodation: *As a young person, i have the assumption I will have to leave because I can't affard to live here I don't have any hope'.* Many participants admowledged the challenge in retaining young people in the area, but many were also unsupportive of affordable housing, especially if it took the form of high-rise buildings.

Ingleside

There were virtually no positive comments on this project, only some limited responses. The potential of ingleside to be a model for good residential design and to have a high level of sustainability was commend on. Ingleside is seen to offer opportunities for encouraging affordable housing in ways that will not damage the present social and built amenities. It was also suggested that ingleside, as one of the new developments, should have aged housing as part of the town plan to keep the ageing population close to services.

12 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS

TRANSPORT

Residents called for Council to work very closely with the State Government to ensure developments such as Ingleside are not purely reliant on cars for transportation and that adequate public mansport is provided from the Northern Beaches to the hubs. There were suggestions that and releases at Ingleside will definitentially impact on transport, and the greater problem of how residents can get out by road in the event of a bushfreas the current road system is inadequate.

There is the need for transport infrastructure to be in place before development starts:

'Before any new development of the Ingleside & Mona Vale precincts public transport options should be well in place with new mass transit systems (such as new light rail and train/ metro options) which will quickly become viable.'

NEED FOR SOCIAL INFRASTRUCTURE

Consultation participants queried the lack of new sporting areas in the new subcivision, '*How many new sportsgrounds* are to be created in the Warriewood and future ingleside subdivisions?" The focus should be on developing new fields in conjunction with the development of increased residential housing or density, and developers should contribute. Natbal courts (preferably sealed) should be provided in new housing developments (e.g. Warliewood, Ingleside and elsewhere) where local clubs can train even after run.

IMPACT ON NATURAL ENVIRONMENT

Queries were raised as to how the ingleside development will improve the landscape and vegetation:

I see population growth as a problem for both quality of life and for preserving biodiversity. The proposed Ingleside development is a case in point, losing bushland in Ingleside, is not what Pittwater residents want or need. We live here.'



NORTHERN FEACHES COMMINENT INGAGE VENTIANA YSES INT



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREA

Jobs and Skills

Strengthening strategic centres

The Brookvale Structure Plan consultation provided most of the information in this section. Key issues raised by the community about Brookvale indude:

- Traffic, transport and parking—'Better transport needed to support population growth. B line is not enough, a train line and tunnel link are needed'.
- Greater focus on job growth and protection of industrial land, prioritising jobs rather than residential development. Requests that industrial and manufacturing are retained and encouraged, and even suggestions for the expansion of industrial/commercial areas into the existing residential areas. Brookvale is, 'the machine of the north' Some comments opposed residential development and increased building heights and strongly support maintaining the employment status of Brookvale. There is a concern that mixed-use buildings will be predominantly residential rather than employment generating. Suggestion that any height bonus should be for employment generating commercial/industrial uses. Several comments related to the need for mixed-use buildings, thus enabling residential living above businesses and providing. affordable housing for local employees. Include 'dual use' boutique shopfronts on secondary frontages in the industrial area.
- Public domain, fandscaping and visual amenity—concerns regarding insufficient open space and that regional open space planning should match population growth. A number of comments about Brookvale Oval and Park—clarification required on redevelopment plans for Brookvale Oval, a request to retain Brookvale Oval as open space, and to retain and upgrade the northern park. There is a concern that community needs are not being addressed, with no axisting or proposed open space in the town centre. Brookvale Oval is a formal sporting facility and does not address the open space needs of the community?.

- Request for employment growth to match education levels and profession of residents (to reduce the need to travel outside the area to work). Council needs to develop a vision for employment and business growth, and a plan to then deliver that vision.
- Concern that Pittwater Road divides the town centre and the effect this has on amenities. Suggestion to promote activation and placemaking on roads that run parallel to Pittwater Road and the provision of a pedestrian-orientated environment and community space away from Pittwater Road. Retain and strengthen Warringan Mail; encourage more quirky and creative spaces, such as art galleries, and music venues; and upgrade the retail scrip and bring in more cafes, restaurants, and so on.
- A number of suggestions related to adding character and amenity to industrial areas, e.g. provide retail shops cafes, restaurants, and bars in industrial areas. Concern the plan for Brookvale lacks a placemaking vision to create vibrant active hubs. The plan should include multiple active hubs. Currently, activity is concentrated at the southern end and there is no activity hub at the northern end near where there is residential development.
- Discussion on the changes required to engage and support industry, such as the excitability of a workforce and additional tertiary facilities and training including a university in this area. People suggested strategies to make Brookvale attractive to large companies, e.g. fexible zoning, belowground parking, increased commercial land use east of Pittwater Road.

Dee Why is also seen as a large-scale employment hub. The comments on Dee Why town centre relate to improving public amonty, the attractiveness of public spaces. Parking is an issue as it is in other major centres. Dee Why often appears in references for the preservation of willage centres further north in the LGA with calls for them not to become like Dee Why. Residents commented on the unattractive streetscape with fail buildings and die Dee Why as an example of what can happen with over development.

14 - NORTHERN BEACHES COMMONTLY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRORITY AREAS

Manly is valued as a tourism and entertainment hub. Residents are keen for more cultural activities, a revemp of Manly Corso. Traffic running through the centre of Manly is affects liveability. Safety is an issue frequently mentioned abut Manly, especially at hight. Tourism is valued for the economic contribution it makes however some would like to see the impact of tourism managed more effectively.⁶

Skills-based training and job diversity

There were some perceptions that job opportunities have been lost due to changes in land use, such as the sale of properties used for small business or entertainment for residential development, e.g. the closure and sale of Many Vale Hotel, which was a major music venue and is now home units. Concern that Dee Why and Brookvale are being planned separately. The planning for Dee Why enabled residential growth and relied on jobs being provided in Brookvale; however, the number of jobs does not match growth. "Weed indie on commercial developments that create jobs".

Planning should encourage businesses and employment that match the education levels and skills of residents, which could include providing/facilitating grants and incentives for small businesses. Business diversity is seen as being important.

"Local jobs and apprentices hips should match the skills and educational opportunities of the area"

Residents identified the need to retain local workers with technical and/or manufacturing skills and also a need for more tentiary education, and accessible transport and affordable housing for key workers. 'Need to attract and retain employees within the area to support a diverse economy. More jobs and job diversity is needed'. Support local, specialist IT businesses that could provide the support reduced for people to work from home, which would reduce the strain on local infrastructure and transport networks.

Young people are concerned for the future, pointing to lew paid local jobs and expensive rental accommodation: *As a young person. I have the assumption I will have to leave because I can't offord to live here. I don't have any hope'*. These issues are important because the Northern Beaches are losing people to other areas due to the high cost of living and the shortage of jobs, *'most jobs are in services, which don't pay well*. Some suggest that younger generations want to work for thomselves and that it is difficult to find people willing to work local low-paying jobs: While tourism offers a 'huge opportunity to provide significant employment opportunities', jobs available in this industry are not necessarily well paid. There was a view that employer buy-th to inclusive employment practices is limited owing to fears regarding costs and requirements, particularly for these with a mental health disability. On the Northern Beaches, employment opportunities may not be located close to where people live, and may not be within reach of accessible transport.

Innovative business environments

Residents feel Council should develop strategies to attract specific industries to the area and create high value jobs.

"To see the development of economically and ecologically sustainable communities that provide real opportunities for the development of local businesses that are not simply reliant on traditional retail opportunities."

Zoning for different industries should be carefully planned and preference given to 'semi-clean industrial sites, not heavy industrial development'.

Residents relised concerns about how well Council can deliver an innovative environment for business with initiatives such as business incubators. Opportunities exist for start-up businesses in the Dee Why town centre, athough Council should focus on all businesses, not just innovators or startups, including home-based businesses.

Council should identify what they can realistically do to improve access to information, incentive programs and enterprise support.

In the opinion of one resident, what attracts big business to Nonthern Beaches is local capital. *Yas an example, a CEO or* startup founder may already live locally, enjoy the lifestyle of living and working locally (environment), have access to financing (economic) and be able to find high-skilled employees (human):

6 This sector provides a onef summary to avoid reportion of scues discussed in other priority areas Mona Vale Centre is discussed in Local and regoted anod coveres

NORTHERN BEACHES COMMUNITY ENGASEMENT ANALYSIS - 15



northern beaches council

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Tourism

While some residents, especially in Manly where tourism visits are high, saw tourism as a negative thing—dirtying the area and leaving rubbish behind—residents also agreed that tourists bring money to the area, thus contributing to the growth and visbility of the Northern Beaches. Tourism offers the apportunity to provide significant employment opportunities, but needs to promote 'beyond Manly' to extend tourism expenditure. Questions about what is meant by "subsinable tourist economy," and whether this is economic, social or environmental sustainability.

The following suggestions were made:

Enhance tourism in Manly, Tourist bus from Manly Whari to Palm Beach', Keep the Manly Jazz festival', 'The creation of a Manly to Palm Beach coastal walking and bloycle track together with a number of 'park and ride/walk' car parks at various points along the way'.

- Other ideas for local attractions include a Vocal cottage economy and the establishment of a surling museum.
- Simplify the process for allowing tourism related events to occur, with skill shortages limiting growth of the purism sector.
- Tourism and partnering opportunities, "Work in plottnership with event organisers in a customer focused manner to promote the delivery of events". Leveraging broader events and activities from the Sydney region (or beyond) and globally significant events that could have a Northern Beaches expression. This should be part of the overall plan, to extract maximum value from events planning.

Consideration should be given to the impacts of tourism. Let, the extent and nature of tourism to the area with its consequent impact on the retail mix e.g. events in Manly generating more day visits leading to more ice-cream shops and a diminction in a broader retail mix – is this desirable?



16 - NORTHERN DEACHES COMMONITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRORIDY AREAS

Night time economy

Community feedback sought more entertainment venues (e.g. cinemas, small bars, live music) in suburbs such as Dee Why, Brookvald and Mona Vale. There were suggestions to use hubs like Manly, Dee Why, Narrabeen and Mona Vale to create Eriday evening and weakend events for the community and some call for more nightlife on the Northern Beaches, not just in Manly. Feedback also indicated a focus on both upgrades to existing 'event ready' spaces; the creation of new spaces and the need for Council to support and introduce sate night time event opportunities, especially for the youth!

'I agree. I have teenagers. I personally think it's fantastic. There is not enough for young people.'

Many young people are gathering in our public parks and having parties that are out of control, noisy, unsafe and result in unacceptable amount of rubbish. If there was more attractive options in the night time such as live music, markets, food etc. in a more controlled environment then this might divert some of the problems away from trashing our parks and disturbing residents.'

Industrial/employment lands

Community feedback regarding industrial/employment lands noted concern about the reteinment of employment lands in proposels to introduce affordable housing into industrial areas (e.g. Mona Vale). There is a need to clarify what exactly employment lands are with business, with this form being a bit restrictive and unclear as to whether retail businesses were included in this definition. Some queried whether housing on top of shops was good or bad for business.

Some felt there was a need to understand the differences between business use and commercial use in various places and that business and commercial lands need to be clearly 'set aside' in new villages and strategic centres.

Frenchs Forest

When asked to share their most significant opportunity for the future of the neighbourhood, residents prioritised building community spaces which connected people to nature. People also prioritised sustainable urban design (e.g. water sensitive design, transport or ented design, sustainable building).

Loss of trees along Warningah Road was frequently montioned as was the general condition of public open space (e.g. street trees, footpaths, parks). A sense of personal safety is important and walking infrastructure is another area of concern. The main concern mentioned is for these community members who need to walk on the road owing to a lack of footpaths, especially children walking to schools and people walking with strollers and young children.

People feel strongly that Frenches Forest has a sense of welcome, they value community belonging, safety, relationships & resilience; however, the area lacks things to do, with people needing access to neighbourhood amenities (a.g. cafes, shops, health and wellness services).

Need planning for Frenchs Forest town centre where can have lots of facilities not just finance and dining'.

There were many comments relating to the proposed closure of Warringah Aquatic Centre (WAC). People objected to the closure and replacament of the WAC to relocate Forest High School, with significant concern expressed as to whether enough investigation had been undertaken in identifying alternative locations for this relocation. There was an additional concern that the proposed new facility in the town centre will be less accessible, smaller and not match the current facilities, notably, the loss of the 50 m Clympiceized swimming pool. There was a strong faciling that the existing WAC is a unique swimming destination used by a clyrese range of people and the loss of this resource would impact on the social fabric of the locality.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 17



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREA People

Access to higher education

Access to higher education, such as a university campus on the Northern Beaches, or easy access to transport options to the existing universities is important to residents. People expressed a desire for their children to be educated closer to home:

'Young people are currently isolated from higher education, with poor transport connections.'

A university to be associated with the new Northern Beaches. Hospital was requested and the vision for this strengthened, as well as other suggestions for an arts degree course to be offered in the area.

There were a number of comments, from businesses and residents, relating to the inadequacy of Brookvale TAFE orferings, 'Brookvale TAFE coesn't do anything for my industry', 'Studies don't correlate with where the jobs are'. There was also the suggestion that there are insufficient courses or space available at local community colleges.

Some see a role for Council to educate youth regarding the jobs svalable in the area and to encourage businesses to work more closely with schools. Skill-based training could be offered by local businesses and by retired people.

Community hubs

Central facilities or community hubs were the highest rated preferred model by multicultural, indigenous, family and youth groups, and the least preferred by seniors and the disabled preferred single purpose centres, e.g. Without the Maniy Seniors Centre, we would not exist; 'Centre custom built by Rolary for seniors 60 years ago'. People described a community hub in a variety of ways – as something that is about connections 'Intergenerational' café/ community gerden/ dog park/ accessible (public transport – car parking)' or more functionality for 'co-location of service providers and Community Services Northern Beaches offices e.g. at Raglan Street site!

Across the consultations, there were suggestions for how to create hubs—to better utilise libraries as a community hub end space for youth; larger parking facilities should function as a community hub with the addition of public toilets, bubblers, socialisation corners/cafes; and to encourage social community connections while people wait for buses.

Park amenities could be improved to function as community hubs and to provide selfe spaces for youth and LGBTIQ (.e. community hub run by volunteers/donations), including restaurants, creative spaces, yoga and so on. In specific locations, recreation contres were identified as having the potential to operate as community hubs, e.g. Avalon, or as an area of urmat need, as in Dee Why where the PCYC was deemed to be at capacity.

Community services

In the Community Centre Strategy 2018, there was high awareness of one or more Council-managed community centres in the Northern Beaches. Most respondents recalled the Mone Vale Memorial Hall, followed by the Availon Recheation Centre, Mariy Seniors Centre, Newbort, Community Centre and Forestville Memorial Hall and Senior Centre, Overal, the community centres in the Northern Beaches rated high in convenience, accessibility and acceptability of the internal appearance, and flexibility of the area. Problems associated with parking was the highest source of dissatisfaction for respondents.

One of the key findings from this consultation was the importance of opportunities for sharing cultural knowledge – intergenerational, multicultural, and indigenous, to the community.

18 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



C Towards 20

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRORITY AREAS

MULTICULTURAL AND INDIGENOUS GROUPS

The community acknowledge that more needs to be done to engage with culturally diverse minorities.

"There's little awareness or celebration of cultural diversity on The Northern Beaches"

The Nonhern Beaches Community Centre Strategy engagement in 2018 planned multicultural and indigenous focus groups that did not occur due to insufficient responses. Multicultural and indigenous perspectives on this strategy came from interviews with three community representatives. These respondents noted that information does not reach all people, different formats are needed for different groups e.g. CALD groups.

The challenges for multicultural groups accessing community centres included cost, transport and ease of use. For example, sometimes it is considered easier to use an RSL hell as options are offered for catering, deaning, equipment/ sound etc. Suggestions to enhance services included a community hub for co-location of service providers and Community. Northerm Beaches off ces plus a Men's shed or a community studio/ workshop space.

Community representatives speaking on behalf of indigenous community members taked about the role of community events in reconciliation, bringing beople together and building sodial cohesion. They noted that shared cultural events are valuable to the broader community e.g. Tibetan and indigenous cultures.

Indigenous cultural activities prefer outdoor locations, 'outdoor activities have higher value'. These outdoor spaces should be safe, with amenity and facilities for women and children. They should also be affordable as fees, even if subsidised, can place them out of reach. It was felt the Indigenous community should have the right to use public land free of charge, 'the Indigenous community is paying for reconciliation despite huge social disadvantage'.

Suggestions included a cultural museum space, a heating centre e.g. at Manly hospital site and monthly access to a place e.g. Peace Park at Oxford Falls for community gatherings.

FACILITIES AND SERVICES FOR PEOPLE WITH DISABILITY

Residents reported a lack of local services to support people with disability, therefore, they must travel to other parts of Sydney to access specialised services. There is a particular issue around the lack of housing options and services to support people with disability and for the eldery to allow people to age in their own homes. Therefore, people might need to reflocate, either within or outside their local community, to access disability services and appropriate housing. Some older Council facilities do not fully catento a range of needs, including physical access, assistive technology (e.g. hearing ald loops), cirection finding (e.g. graphic and braile signage) and other non-physical considerations such as the need for quiet spaces for people with autism or adult change tables for people with intellectual disability.

FACILITIES AND SERVICES FOR THE YOUNG

There were a number of comments about the lack of services available to ensure the safety of young people, particularly at high, with requests for increased availability of safe hight activities for teenagers and more community activities.

There is nothing for teenagers to do except hang around the beach at night and nowhere for them to socialise safely.'

Youth focus group participants in the Community Centre Strategy engagement in 2018 fait there was not enough diversity in centre activities (too much dance). Young people don't go to drop in – we need to be creative.' Spaces need to be affordable, accessible via public transport and safe.'

Young becole also need options to be mobile and go to skate parks and outdoor recreation areas. 'If young people wont to 'connect', give them a space'

They should provide a one stop shop for social support services and 'places for kids to stay if they feel unsate staying at home.'

CHILDREN'S SERVICES

While people are generally satisfied with the level of children's services provided, some noted that there is a shortage of affectable childcare options for lower to middleincome families across the area.

'There's not enough affordable places, it's too expensive to go private.'

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 19



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

However, others felt that the childcare services provided by the private sector were adequate. While there are differing views about how much private and public childcare is or should be available, the key issue is that residents feel that childcare should be affordable and accessible. Children's services are of higher importance in Frenchs Forest than In other areas:

If looking at increasing the population, we need to have services to match, such as more childcare spaces.'

Safe and inclusive communities

One of the core values that the community consistently expressed is for connected, vibrant communities, which is also one of the main reasons for living in the region. The neighbourhood place stiributes that contributed most significantly to liveability are that 'There are people like me' (age, gender, interests, ethnic backgrounds and so on) and a sense of personal safety (for all ages, genders, day or night). Residents associate the area with a sense of neighbourhood safety (from crime, traffic, pollution etc.). Security concerns related to drink driving and drugs and, to a lesser degree, in being able to move about in some neighbourhoods, especially Manly at night.

'Manly is unsafe after hours, especially on the weekend.*

The word 'inclusive' was used to describe a place that is welcoming to everyone and offers services that welcome. and meet the needs of different cultures, age groups. Inclusion means housing affordability, accessibility to arts and recreation activities. Opportunities must be adequately funded and accessible to those who cannot afford to purchase equipment, space, and training to ensure equity. This also applies to the hire of Council facilities for community. events. Suggestions were given to provide sport and outdoor activities with equitable access, as well as public spaces catering to different needs and demographics (e.g. safe, fun and dedicated spaces for young people).

There were only a few mentions of social or outural diversity, with acknowledgement that there is little awareness o celebration of cultural diversity and a desire expressed for more. When visioning the future for the Northern Beaches. residents would like to see community life celebrated, and for this to be inclusive of all cultures and areas.

BELONGING

Residents of the Northern Beaches feel that community connections should be prioritised together with other planning initiatives. They strongly value the community in which they live, which includes the friendliness of people. the social life in the area and the village feel the area has, particularly in Pittwater. Community comments address the need for belonging:

'The sense of community and that it feels like a small town."

People identified the need for more networking, meeting, places and support of cultural activities, for example, outdoor music and theatre events were seen as a way to bring people together.

Wellbeing and mental health should be strengthened, particularly for those at risk groups. Health outcomes must be improved for youth and the Aboriginal and Torres Strait slander population plus there was a concern that youth suicide is a significant problem despite the affluence of the area. Some residents identified a lack of awareness and understanding regarding disability, both physical and mental, within the Northern Beaches community. Residents felt that an increased feeling of community value and belonging can be achieved through leisure and social services, such as cultural and sporting facilities, by encouraging and promoting multiculturalism and, specifically, supporting Aboriginal and Torres Strait Islander people. Suggestions for sporting and nutdoor activities with equitable access were made, public spaces catering to different needs and demographics (e.g. safe, fun and dedicated spaces for young people); playground design that accommodates people with disability

Experiences were different depending on location, e.g. there was a call for greater social cohesion and participation in the Dee Why area, whereas Avaion respondents made several suggestions for improvements but overall presented a very positive impression of the community connections in the community.

No change, Avalon has an excellent track record in relation to community connections and culture.'

20 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



beaches ounci

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)



PRORITY AREAS

Aboriginal heritage

Comments relating to Aboriginal culture and heritage were primarily in two areas.

PUBLIC RECOGNITION OF ABORIGINAL IDENTITY

People commented on the need for greater visibility of Aboriginal heritage. Aboriginal attworks need to be preserved and identifying placues installed. Beach signs should include an appropriate Aboriginal language ecuivalent of the English terms used. A suggestion in Avaion was to "place signage of southern and soying "Welcome to Gangal Country" and more information should be publicatly available on the Aboriginal history of the Pithwater peninsula".

Most references to Aboriginal culture and heritage were from the Coast Walk Public Art Engagement Report 2019. The Coast Walk Public Art Working Group stated that it was essential to acknowledge and celebrate local culture through art opportunities that express Aboriginal stories and connection to place. People suggested *istories of the area*, *including Aboriginal, environmental and cultural heritage* and that *'public art should explore Aboriginal heritage along the Coast Walk*.

EVENTS

Some respondents raised concerns that the area did not host any events during NAIDOC week in 2016. They felt there should have been *Some acknowledgement of the first peoples whose land this will always be*². Concerns were also raised that the 2018 event strategy did not mention the Curingal Festival. *If was saddened to learn the Guingal Festival is not going ahead this year, it is always well received and a great opportunity to learn more from the Aborginal community. Please bring it back!* There was a suggestion to acknowledge Aborginal Surviva Dey, *acknowledge and educate the local community on the Aborginal and Indigenous Impact of the day of January 26, 1789*.

Recreation and open spaces

One of the core values consistently identified relates to lifestyle and recreation. This is considered one of the main reasons for living in the region, and a key priority for the Council in future planning of centres, vilages and open spaces. Extensive consultation has been undertaken regarding the sportsground strategy and comments on this dominate this section.

There is general agreement that more sportsgrounds are needed but there are a variety of opinions on the best way to manage this and how to prioritise needs. People who were negative about the sportsground strategy felt there are enough sports fields already' or that leasting fields are being used below capacity'. There were comments relating to the lack of long-term planning and a request to look at distribution throughout the area. Some felt that sporting groups need to pay more to use the fields and that sports fields encroach on informal recreation areas.

USING GOLF CLUB LAND FOR SPORTS FIELDS

Most sporting groups that ledged submissions were generally supportive of the Draft Sportsground Strategy in relation to the proposals for their sport in particular and, in some cases, for other sports also. Three sporting groups—Gulf Australia, Golf NSW and Warringah Golf Club—were not at all support ve of the recommendation to convert all or part of any golf course to sports fields. Golf course supporters were over represented in responses and skewed sertiment on the conversion of golf course shewed sertiment on the conversion of golf courses there would be much higher community support for converting suitable open space to sportsgrounds.

Those who did support the conversion of golf courses in general to sportagrounds dited reasons including an oversupply of golf courses/land for golf and an undersupply of sportsgrounds, plus the fact that golf courses are not accessible to the general community. Other comments argued that there are more field sport players than golf players, golf takes up a lot of public land, the ratio of golf courses per upopulation is higher on the Northern Beaches than elsewhere, and there are enough full- and half-sized golf courses aready.

Community responses opposing converting golf course land to sports fields argued that population increase and aging will increase the popularity of golf in the future and were strongly opposed to replacing golf courses with facilities for other sports. Golf is seen as a sport enjoyed by older people, although some argue that participation is decreasing overall.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 21



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRESERVE OPEN SPACES

Comments related to finding a balance between sporting facilities, bushland, parks and other green spaces. Not all agreed that a sports field is necessarily an attractive open space for other forms of recreation. 'Apart from practice times during the week and weekends, these bleak open spaces are not used".

Friends of Narrabeen Lagoon offered the view that Crown and private lands with environmental values such as bushland are not suitable for use as playing fields. They had no objections to private (and acquisition for sports fields if there are no adverse environmental impacts. Some open space is considered suitable for conversion to sports fields, e.g. the driving range at Pittwater Golf Centre and the use of land at Fern Creek Road, Warriewood,

There is widespread agreement that parks and recreation are critical for community wellbeing, in commenting on this, some feit that the area has adequate open space and recreation opportunities, but these need to be better managed and maintained. Others noted that the high demand for active open space and sports fields indicates a need for more open spaces as the copulation crows. There were also a number of comments suggesting that sports fields are better maintained than passive open spaces.

NEED FOR NEW DEVELOPMENTS TO INCORPORATE SPORTS FIELDS

Apart from objections to using golf dub land for sporting fields, the largest number of comments and the stronges feelings around this issue concerned development. A lack of planning when land is released and failure to make developers provide these facilities were the key themes.

The issue generated strong emotions.

'The Warriewood area has shamefully been allowed to develop into a dense family housing estate without any new fields.'

The lack of new sponing areas in new subdivisions generated many comments asking how many new sports grounds are to be created in the Warriewood and future ingleside subdivisions. Suggestions that the residential development of Warriewood and nearby areas has proceeded without adequate consideration of open space and playing fields were expressed. It was around that this should be the first priority before using other spaces (such as golf clubs). Sports fields should be located where they are most needed and be accounted for before areas are developed.

4 Wailing and cycling recreation opportunities are included in Active travel

22 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS

Acquisition of land for new liwes not supported because it might involve clearing bushland and has a high cost to taxpavers. Private land with no environmental value is preferred for new sports fields. There were some suggestions that greater efficiencies could be gained by changing the field allocation/scheduling process to maximise use, spreading the use across peak times, and requiring justification for allocations. A large number of submissions supported partnering with public. Catholic and private schools to allow community access to their sports fields and hardcourts for netball and basketball after school and on weekends

installing synthetic surfaces on some existing sports fields to enable greater use is generally supported. Objections to this argued that this is an expensive strategy that favours sports clubs and limits passive use by other residents.

ALTERNATIVES TO SPORTSGROUNDS

Some alternatives to providing additional outdoor sports fields. and sports courts were put forward, such as the succession to build mountain biking, skating and other non-standard sports. facilities to reduce demand for new sportsgrounds and indoor sport/netball courts for field and court sports

There were a number of comments relating to the fact that there is more to life than sport.

Remember that not everyone plays sport.'

Some argued that while more sports fields are required, this should not come at the expense of those who are not interested in sport. 'Replacing golf courses with sports fields is fine, that's sport for sport". Allowing sports fields to encroach into existing open spaces/parks/reserves should not be an option as sport disrupts the passive enjoyment of nature.

Concerns were raised regarding the proposed closure and relocation of the Warringsh Aquatic Centre (WAC), including that the proposed new facility in the town centre will be less accessible, smaller and not match the current facilities. The WAC provides facilities and services that are utilised by a rance of community members from children to senior residents: collectively, this adds to the social fabric of the locality and the loss of this fectility would implinge on this. There was also concern about the potential loss of basebail fields and open space, which adjoin the existing WAC on the aquatic reserve.

The expansion of opportunities for dog exercise areas throughout the LGA was called for, both formal unleashed dog. areas and more opportunities for dogs to be on the beach Not everyone agreed with this, however, with some strongly opposed to dogs on beaches and sceptical of any further need.⁴



beaches ounci

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)



PRIORITY AREAS

PRIORITY AREAS

Arts and creativity

People see the arts as a way of bringing people together and supporting community cohesion, which fosters community and individual wellbeing. Consultations in this area revealed general support for providing opportunities and places for artists, musicians and creatives. The Council needs to produce and encourage creative spaces and performance venues for theatre and the creative arts. Council should also provide community spaces for creative arts (e.g. peniting, sculpture, music), especially as the arts help open up conversations around inclusion, connection and identity. Mixed vews exist as to whether the Council should exist artists, although the majority stated that the Council should.

Most focus is on the northern and of the local government area – Mona Vale and Avaion. The community demonstrated a strong desire for establishing a new creative space in the northern part of the LCA, but not at the expense of existing facilities and opportunities.

More than 800 people (community members, shists, creatives and stakeholders) participated in the Arts and Creativity Strategy consultation in 2015, demonstrating the importance the community places on the arts being more accessible and visible. A core theme in the community consultation was the importance of arts and creativity to community (directly through ans opportunities as well as indirectly through the quary of the built environment). The report noted that current participation in the arts is high across all demographics but could be increased with more opportunities. Notably, participation was high in some activities, e.g. chemas and film, cutural events and festivals, but low in more niche activities such as dance programs, creative enterprises and literary programs. Attendance frequency in niche activities was high due to a core group of regular attendees.

This is Illustrative of consistent community feeling over a series of engagements. The Mona Vale Place Plan in 2018 revealed strong interest in the arts and creativity, *Xs a resident, the Place Plan is not just about jobs it is also about creating a vibrant creative arts and culture hub in Mona Vale"* Similarly, the My Place Avaion consultation revealed a community that strongly identifies as a haven for entistic and creative activity, *Xvalon is a hub of antistic talent looking for a studio space. It is a village so it should be easy to inalitation the community split"*.

Some comments sought to have creative arts resources/ facilities being equally as significant as sports resources, demonstrating a perceived imbalance in priorities that should be corrected. The Creative Art Space Project consultation in 2017 revealed a keen appetite for increased cultural access and programming in the wider community. The arts community articulated a strong desire to come together to network, create and present their creative products. Artists at the northern end of the peninsula commented on the lack of decicated arts space and opportunities but acknowledged the high interest in the arts and creative sector in the area. There were strong sentiments about creating a space that fostered connection, inclusion and happiness, where people of different ages and abilities could 'see *and interact with the developing art scene on the Notthern Beaches*'.

What people loved about the idea of a new cultural space, was the sense of ownership and the importance of the local community, it is a place where i can see and interact with the developing or iscene on the Northern Beaches'. Strong sentiment was expressed about the village concept—ideas for how a creative space could work discussed mobile spaces and linked centres 'through the villages and activating village greens'.

While creative spaces should be of high quality, they must also be affordable, with community members wanting active engagement and a sense of control. The comments discussed initiating and driving creativity programs, and of having input into planning that affects 'land use, ephemeral art, busking and other public art initiatives that enhance the public domain' This is also reflected in the level of engagement in the Walking Plan consultation—a large number of suggestions for where and what type of public art should be displayed to enhance the walking experience. The community vision is to embed art and creativity into everyday life, and discusses this as contributing to a more diverse place identity, 'getting people outside and engaging with the natural world". In Avalan, there were suggestions of 'perhaps a local version of sculptures by the sea with local art in the parks and local artists commissioned to beautify the streetscope with street art'. In the Public Art. engagement 2019, there was strong support for temporary programs, activations and participatory events (such as arts festivals and outdoor exhibitions) as experiences that community members would like to contribute to and enjoy along the Coast Walk in the future.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 23



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS

Creative arts contribute to building a strong and creative evening economy, which is important to making the Northern Beachas more liveable—particularly for young people and visitors. Young people participating in the Creative Art Space Project consultation were asked about Glen Street Theatre and the Art Gallery, and how would they improve them. Suggestions included more activities that connect people, give young people a platform to communicate, digital sharing in public spaces, open arts to younger generations such as 'Gen Next' at Museum of Contemporary Art and more information and education on art production. Young people talked about the importance of creative spaces for belonging and identity, bringing the community together in safe environments.

There was strong interest in cinema and firm-production generally. Young people thought the idea of film clubs or screenings could have broad appeal and promote community involvement. Support and need for a performance space in Mona Vale were discussed, with the majority of respondents in full support of the project and expressed the need for a venue of this type on the Northern Beaches. Concern about the amount of green space lost to this venture was a theme, as well as concerns that it should be silfordable (and subsidised) for community groups to use. Other concerns included the cossibility that rateoayers would heavily subsidise the venue if it did not make enough revenue, and that ambitions for a world class venue would make it too expensive to build and, ultimately, a Temon' that wouldn't get used. Above all, the community want this venue to be a place they can be proud of that is welcoming to all, and they don't want it to be seen as just a 'school venue' but rather as a place for all different user and age groups from youths to seniors.



24 - NORTHERN DEACHES COMMUNITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRORITY AREAS

PRIORITY AREA
Places

Character and lifestyle

The elements of character and heritage that are important to residents differ between locations to some degree. The three former councils had very different regional cultures, which is soli evident even after their amaigemation. This comes to the forefront in Pittwater, where there is strong resistance to over-development that is not shared by the residents of Werringah and Maniy.

Residents living on the Northem Beaches believe that the area they live in is distinctive, a special place secluded from surrounding areas. They believe the natural environment, including the beaches, bushland and waterways, as well as the community, lifestyle and 'casua' way of life gives the area a special feel. While the cut-off location of the Northerm Beaches provides this uniqueness, for some a distinction was also found in the cutural diversity of the area. These distinctions give the residents a sense of passion, as well as a sense of ownership—they value living in the area so much they want to keep it all to themselves.

'Local identity and communities should be preserved.'

VILLAGES

The ides of villages, i.e. small, low density, low rise, connected, is very strong, particularly in the northern end of the LGA.

'Avalon is unique and a one of a kind a special village, please let's not over develop.'

Preserving and enhancing the unique character and vibrancy of our villages.' The idea of villages links to a sense of community, where people relate their experience of the local community to being similar to a small town—'the small community feel'. They like that they can walk down the street and see people they know.

LOCATION

Residents value the area and have a sense of entitlement/ stewardship: 'Very special place, I feel like a custod an', 'Guardians/custodians of areas/the environment linking out actions to the Impacts', 'This is ours, we don't want anyone else to know about it'. Some value the distance from Sydney and the isolation this has created, 'Untouched natural paradise away from development'. It is described as city meets basch and the basches are part of the local identity, 'the jewei of Sydney'. Residents consider themselves lucky to live in such a great area, surrounded by the natural environment and a part of a great community. So much so, that the majority said they would never leave.

Felt like I won the lottery getting to live here.'

QUALITY OF LIFE/FULFILLMENT

The lifestyle and cubice of the area give residents fulfilment. The feelings of satisfaction and happiness that residents gain from the environment and the community split in the area contribute to a high quality of life. They talk about the work life balance, and how fortunate they are to live along these beaches and be able to work and live in the area. A 'summer ideatyle'

An important element of quality of life is a relaxed, laid-back lifestyle. Avaion residents describe their village as a laid back, relaxed, unique local beach community. They want to relain these characters and 'not become just onother northern suburb of Sydney'. This sentiment applies across other areas of the LGA, 'Keep the open space' and 'Lord-back lifestyle'.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 25



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS

PRORITY AREAS

Many residents have memorable associations with the area, including the ocean, and many have a history with the area. that provides them with a feeling of nostaloia.

I like to think that one day we will have a generation of children who know the joys of going for a walk with their family along a beach.'

FEAR OF CHANGE/LOSS

Residents fear population growth will change the character of the area. They like their current ability to use services and facilities, and enjoy knowing they live in 'paradise', with few wanting to ever move out of the area. Mixed views are present on whether growth should be allowed, with some accepting that it is inevitable, and others fearing that an increased copulation will place pressure on all the community's aspirations and 'negatively impact on our quality of We'. Concern was voiced about the impact of development. on lifestyle, including whether it would be possible to enjoy a declining and potentially more populated natural environment.

'The insular peninsula – just enough of us, but way too many others that want to come over."

There is the fear that soon this won't be the most liveable. part of Sydney. Avalon residents feel very strongly that there is no need for change-they don't want to be like the rest of the Northern Beaches and certainly not like Dee Why, Some fear that new people moving into the area will change the character of unique neighbourhoods such as Avalon.

Local and neighbourhood centres

In the Placescore - Community insights consultation in 2018, participants were asked What is your small or big idea to improve your local Town Centre?' Responses were summarised into key themes: transport related ideas around car accessibility and parking, and facilitating active modes of travel; streetscape design and beautification projects relating to tree plantings, green spaces and public art and design, activation related ideas, for example, places to gather and relax, culture and art, family friendly places and events. Residents also talked about the need for better restaurants, bars and cafes, more commercial diversity and local shops, better community. activities, and less vacant shops and more upgrades.

Individual centre findings reflect these trends. In Avaion, the top five town centre place attributes valued by respondents. were elements of the natural environment (e.g. views, vegetation, topography and water); overall visual character of the area; outdoor restaurant, café and/or bar seating; vegetation and natural elements (e.g. street trees, planting and water) and cleanliness of public spaces.

'Significant planting like Newport in the centre of old Barrenjoey road."

Do something about empty shops. It makes the place look as if it's dying a death.'

Several comments were made pleading for no traffic lights at the intersection of Old Barrenjoey Road and Avalon Parade, with concerns that these would disrupt the village feel and add to concession.

Mona Vale Town Centre is valued as a local centre that has a 'village character'. Most agree that there are some development opportunities and the centre can be uplifted. with 'placemaking' activities and 'enlivening' the centre. being generally supported. For many respondents, there remains some uncertainty around the ability for the existing infrastructure to cope with the additional population. Others believe that if the Council retains the Mona Vale Town Centre as it currently is or with limited change, they can preserve the current lifestyle and community amenity, and protect egainst anti-social behaviour and transient population effects. There is general opposition to increased height limits from 4 storeys to 6 storeys based on potential building bulk and overshadowing.

A large number of responses were transport related, with many of these relating to support for additional car infrastructure and increased car accessibility and parking. Improving pedestrian crossings and safety, especially along Pittwater Road, was important to respondents.

in Brookvale, there is concern that, because the town centre is divided by Pittwater Road, high traffic volumes will fail to deliver an active centre. Suggestions were received from the community to promote activation and placemaking on roads that run parallel to Pittwater Road and for the provision of a pedestrian orientated environment and community space away from Pittwater Road.

There is concern that the Brookvale Town Centre plan lacks placemaking vision to create vibrant active hubs, with the belief that the plan should include multiple active hubs.⁶

5 Further commont on Brookvalo as a strategic centre can be found in Satingthening settlegic tentres

26 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 26



beaches ounci

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)



Overail, the business community is concerned with parking and landscape controls in the village centres, with the appearance of the villages and town centres being important to businesses (e.g. the Balgowiah improvement program is expected to revitalise the retail strip).

Respecting heritage

Where mentioned, heritage was spoken about in general terms, such as 'maintaining the ambiance and heritage of the area' or appreciating the 'history and neitlage of Patwater/horthern beaches' or even celebrating 'the bearage of the beaches' to one sentence'. As the Northern Beaches provide beachside and waterway recreation for a large and growing part of the Greater Sycney population, one comment suggested seeking special recognition and status for Northern Beaches in the Greater Sycney Commission Plan with a 'focus on appropriate economic development and tourism as an 28.8 area for a vast part of the greater Sychey metholared and tour and 'the greater Sychey metholared and tour and 'the greater's sychey metholared and tour and 'the greater's sychey metholared and 'the greater's sychey and

INDIGENOUS HERITAGE

The most common references were regarding the need to recognise and retain indigenous heritage. This was raised in a number of contexts—bublic art, and community connections and culture. *Indigenous heritage needs more priority*¹ It was noted that Aboriginal heritage is being increasingly recognised and valued, with the example being given of the Moon Rock Aborginal Pace nomination.

Preserve any Aboriginal sites and acknowledge their connections; There is very little links with our indigenous heritage in Avalon.'

NATURAL HERITAGE

Protecting the environment deserves a higher priority or the area will continue to tose unique areas of natural heritage. *Northern beaches is losing forest, trees, heritage etc to make way for wider roads and more cars, which will generate more congestion?* Respondents fait that the community faces serious issues in conserving natural heritage, "Conservation is just as important as development, especially from a (multi) output, for ensolving.

BUILT HERITAGE

Hentage buildings are mentored in relation to new development planning. The Warningah Golf Club is noted as having recognised horliage values that must be maintained and enhanced. The Barrenjoey Headland and Light House are referred to as *the jewel in the crown of Pittwater*, with the importance of preserving these for future generations.

The term heritage is used in a number of other contexts—garden heritage, and cultural and religious heritage. There should be a 'permanent nome for the Avalon Beach Historical' Society collection' and two submissions suggested the establishment of a local surfug museum as pait of preserving the local dently and for tourism purposes. In indicate, community submissions made several comments regarding the natural. Aboriginal and built heritage of the precinct, *Appropriate cultilage be maintained around the landmark Bohal' Temple* .

Respecting heritage is a challenging task, with the consultation with Mona Vale Surf Lifesaving Club discovering that most respondents supported the incorporation of heritage elements in the design as they believed the design would embrace the club's history and future achievements.

One criticism of the design was that, "The design of the building is not in touch with the history of suid lifesoving, could be more aligned with historical pavilion".



NORTHERN FEACULS CONVENIEVENGAGEMENT ANALYSIS = 27



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREA

Connectivity

Public transport

The community feel that local transport connectivity is poor. As one participant stated, 'it all comes back to local transport. The local suburb interconnectivity does not exist

The need for connections is very important and a variety of issues are mentioned, 'No way to get from Fairlight to anywhere', 'Few connections from Warringon Mail to Freshwater', 'Nothing too much of North Balgowlah after dark'. People also noted that there is no direct public transport from 'hinterland' to Dee Why or Mona Vale or Manly. The 2016 Mona-Vale Place Plan consultation highlighted the need to increase public transport including the lack of services to the west (i.e. Chatswood, Ryde, new hospital precinct):

For buses, keep the L90 route, new routes, more frequent buses, electric buses, and timetables to improve services and connectivity – especially East-West.'

Cross country services need to link to major transport. routes, 'Connecting to the city is important but without local connections we get nowhere'. It reduces access to local businesses, decreases the local night-time economy, turns the roads to chaos on weekends and forces entrepreneurs out of the area. More buses (i.e. electric) are needed on hilltop suburbs to alleviate car trips.

Better public transport in the suburbs is also linked to the ideas of reducing car use and keeping excess cars and congestion out of 'village' areas, 'More public transport in the suburbs based on E88/E89 and E90 buses. Keep cars and public transport out of Avaion CBD as much as possible'. Improving the Northern Beaches school bus system (and getting cars off the road) could be achieved by a 'llexible system of medium-sized electric buses to complete all motning and atternoon school runs'.

all the way to Palm Beach, otherwise terminate at Mona Vale rather than at Newport'. People also suggested that the Council should have a stronger focus on the need for minibuses to increase connectivity between main B-Line routes. and the suburbs. There were concerns that an expansion of the B-Line service to Newport would most likely create a new traffic issue for that area. However, a B-Line bus to Chatswood, via the hospital, was supported by participants

Council should propose that 'every fourth 8-Line bus goes.

Active travel

Active travel has been the subject of several engagement. activities, both as part of a general transport strategy consultation and regarding specific activities such as walking and cycling. The level of community enthusiasm is evident in the high consultation participation levels and the nature of the feedback given. While people talked about problems or things that need to be fixed, they also extolled the benefits of the activity and how much they would like to do more. This aligns with the lifestyle aspirations of the area-the vision many have for life on the Northern Beaches is one that enables an outdoor ifestive that can make the most of the natural environmental benefits of the area, which is sustainable and connected.

Through all consultations, there is broad support from community members and stakeholdiers for a greater focus on active transport.

WHY IS ACTIVE TRAVEL A GOOD IDEA?

Environmentally friendly

Comments referred to the fact that cycling is a more sustainable form of transport in light of rapid population growth. and 'cheaper than insanely expensive road upgrades'. There are benefits to the natural environment because less space needs to be given to the creation of reads.

Many noted significant benefits in reducing the number of cars on the road—not just for decreasing traffic congestion but in reducing pollution, thus making a positive contribution to helping maintain the natural environment.

28-NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



beaches ounci

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)



PRIORITY AREAS

Overcome extended travel times due to road congestion

More people waiking or cycling would ease local traffic congestion, particularly in local centres where this is a significant problem, 'The traffic is so bod in local centres that it takes forever to drive locally'.

Increase health and wellbeing with physical exercise

Most people supporting this idea mention the physical and mental health benefits of exercise. For both waiking and cycling, the activity is considered healthy only in so far as it is safe; safety issues are the most prominent concern across all consultations in offering support for the Mona Vale Place plan. The Heart Foundation also emphasised that communication strategies and a behavioural change program should be linked to supportive bulk environments.

'Cycling is brilliant not just for physical health but mental wellbeing.'

WHY DON'T THEY RIDE/WALK AS MUCH AS THEY WOULD LIKE?

Poor standard of current cycling infrastructure

Concerns about the standard of infrastructure currently available are a consistent theme, which was also mentioned as a key need in planning new residential developments.

For those traveling to work, some considered active transport to the dity as being unrealistic, unless bike paths were built to Maniy Wharf and end of the facilities were provided at destinations. End of the facilities should be a priority for the Council—areas such as the Maniy Ferry terminal, B-Line stations and parks were frequently mentioned as places that need more facilities, such as bike radio to safely lock blockles.

Many comments related to the need for dedicated on-road cycle lanes in each direction to facilitate/encourage more riders to commute to work in greater safety. One example, the roadworks at the north end of Forest Way, was seen as a great opportunity to but in cycle lanes. Other respondents asked about plans for e-bicycle lanes in Seaforth, improved cycleways through Dee Why Shopping Centre and from near Hawkesbury Avenue to Delmar, and whether cyclists could share the bus lanos with the B-Line service.

A few perticipants indicated it is important to understand that, different bicycle users have different needs. A focus on this difference was identified as a way to approach cycling in the Northern Beaches. For example, acknowledging there is a growing interest in cycling as a group sport would hep to identify infestructure needs and create opportunities to accommodate this cycling group together with those community members who commute by bicycle or who cycle for casual recreational purposes.

Cycling is dangerous with cars

The community interested in active travel overwhelmingly ask for separate cycleways. They consider ricing with cars dangerous and a barrier to increasing active travel. Many said they would not more if they could be physically separated from cars. Marked cycleways on the road were not considered a safe alternative.

'Cycle ways that are on the road, with a bicycle painted on the road are insulting and laughable and worse than nothing.'

A lack of continuity affects perceptions of safety—having a separate lane for *just a short site toh then push cyclists to share a road with cars'* doesn't work.

Not everyone is totally in support of separate bike lenes, a non-cyclist observed that bikes are still on footpaths (in Freshwater) even though bike lanes are present there. This was seen as a waste of expenditure.

Shared paths are not safe for anyone

Safety on shared paths is an important issue for both pedestrians and people riding bidycles. Complaints from pedestrians often relate to feeling uncomfortable with bidycles, passing in close proximity and the speed at which they travel.

Bicycle riders often encounter pedestrians wearing headphones, dogs (on and off leash) and unpredictable movements of children. Cyclists also commented that sharing with pedestrians is dangerous, some even suggesting this was worse then riding on the road.

Overall, community responses support the idea that walking and cycling should be appropriately separated with infrastructure that caters for these different users. This physical separation was considered important to improve the sofety for all users and to improve accessibility.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 29



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS

Lack of connectivity

Arguably, the largest barrier to people choosing to ride bicycles is the lack of connectivity of the off-road cycling network. Manly people would be more willing to ride a bicycle if their route did not require them to cycle on a road with motor vehicle traffic. This is the experience reported by both leisure riders and those commuting to work.

Improving cycling connectivity was also mentioned by some participants as a way of encouraging different user groups to cycle. Addressing these missing links by retrofitting existing infrastructure was highlighted as an option to encourage waiking and cycling through areas that people are stready familiar with. Road crossings were mentioned as barriers. where there were safety concerns, with crossing busy reads/ junctions and needing to compete with traffic a concern for many. Connectivity to key attractors such as schools, shopping centres and public transport was repeatedly mentioned by participants. Participants considered that improving these links would improve walking networks in the Northern Beaches area.

Driver behaviour towards cyclists

There was a common concern that people often feit unsafe or threatened by motor vehicle drivers when cycling on Northern Beaches roads. Most people agreed that the majority of motor vehicle drivers were respectful towards people riding. bicycles; however, it was felt that there are many occasions where people felt unsafe. Comments referred to the negative. attitudes of motorists, and of a culture of antagonism toward cyclists in Sydney:

I cycle to work but recently have become too scared because of the attitudes of motorists."

It was felt that more could be done regarding driver education and community mentality to improve attitudes towards cycling and cyclisis.

Safety and accessibility

People taked about creating more pedestrian precincts and improving the condition of footpaths to remove trip hazards and also for better lighting at hight in some areas. Some areas are considered generally unsate for walking:

'I would like to feel more safe and secure when walking around The Corso as there are undesirable elements there both day and night.'

Across ell arees, pedestran safety was a significant and major concern, primarily in those areas where community members. indicated that they need to walk on the road due to the lack of a footpath. The lack of footpaths at both Palm Beach and Whale. Beach received particular attention. Quality of paths was also identified as a concern as some participants found that unever surfaces and tree roots can represent hazards for people with disability or reduced mobility. The current width of footpaths was also mentioned by participants, as future paths need to accommodate different users. Special attention was given to people pushing prams and people using wheelchairs, as they need wider spaces to move without affecting other types of users. This is part of a wider concern around accessibility and provision of infrastructure that accommodates people with disability and reduced mobility.

There is also clear community interest in encouracing schoolaged children to use footpaths to commute to and from schools. As such, the provision of footpaths near schools is seen as a priority.

These participants indicated that accessibility was related to the level of pleasure in the activity and highlighted that this infrastructure could encourage elderly people, school children and people using mobility devices to use walking and cycling facilities more frequently.

Reliable and safe footpaths around the community can definitely encourage more users. especially the elderly people."

Children riding to school

The importance of encouraging active travel from an early age was mentioned by some participants in a number of consultations. More options for school children to safely commute to and from school using cycling infrastructure. would reduce the need for parents to use cars to dropoff and pick-up their children, e.g. suitable infrastructure is required within a 3 km radius of schools and more initiatives such as Ride2School should be introduced. This was another argument for separate cycleways.

High school students commented on the need to prioritise active transport options, particularly footpath and cycling path upgrades. Providing bike carriage spaces on buses was also mentioned by young people as a way to promote the use of active transport in the Northern Beaches.

30 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



beaches ounci

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)



PRORITY AREAS

Beaches Link Tunnel

The primary consultation for this project was the engagement, around the Beaches Link Tunnel submission, where there was overall community support in the feedback received on the proposed Beaches Link project:

'The Beaches Link Tunnel is necessary to the whole of the Northern Beaches to relieve congestion and to speed up the movement between the NB and the rest the city.'

There were also serious concerns about the impacts construction and operation would have on local amenities, nearby properties and schools, and on local traffic and the environment. The main themes identified were:

- Link Road and connectivity to the portal—concerns about the design and the potential for congestion with the introduction of traffic signals on Burnt Bridge Creek Deviation. There were also concerns that the Link Road will destroy the open space and recreational facilities in this area, particularly that members of the golf dub will be losing an asset they have worked hard to preserve and want to grow for future generations. Questions were relied as to why other areas further north cannot be considered as entry points to the tunnel.
- Emission—stacks, filters and locarion are of considerable concern, with people worned about the long-term impacts on nearby properties, education facilities and future green space use. The technology being applied to this scale of tunnel is insufficient to other countries and the level of investment in the project (i.e. more should be spent coming up with a better solution)? In the survey, emission stack location and operation was rated the most important element of the project to respondents and many comments expressed very stong concerns about the health impacts associated with emissions from the stacks.
- Construction impacts on local roads, congestion issues and increased risk for nearby schools and local roads from the additional roads created by this project.

Prior to the community forum, over 40 submissions had been received by the Council. The majority of these submissions were provided by Balgowiah local residents, Balgowiah Golf. Club members, and parents and familias of school children in the Balgowiah area. The majority of these submissions were not opposed to the tunnel per set, but strongly objected to the Link Road and the loss of green space. Many respondents were also concerned about the environmental impacts the project would generate during construction and operation. Furthermore, a recurring theme was the potential loss of property value associated with the Link Road.

Some participants indicated concern that the proposed Beaches Link lunnel would provide a further incentive for people in the Northern Beaches to use their private cars. These participants indicated that the proposed tunnel should only be used for public transport. Participants proposed additional measures, such as 24 hour clear lenes on congested roads and dedicated peak hour lanes for buses, which could encourage more efficient use of the existing road network. The issue of increased use of private cars was raised in the Bike Plan consultation that *inotomays only encourage more people to drive which in turn leads to more congestion and pollution? Just a vicious cycle' and <i>linggine the guality of Active Travel infrastructure that could be built with 18th of that budget*.

Freight

There were relatively few comments relating to freight and legistics issues, with most comments regarding road use end the depectly of local roads to cope with increased treffic. Road upgrades must include the capacity for public transport to be given priority. Effective depectly can be increased by policy changes, such as increasing delivery hours and better planning for freight delivery needs during development:

Freight should not be on the road at the peak commuter times."

Limiting the length of freight vehicles that are permitted on major roads was suggested, due to existing road constraints and the increased safety risk to other road users, 'put freight and shipping containers backon trains and off dangerous trucks clogging the roads'.

Road network

issues around an efficient road network have been a consistent theme throughout the series of consultations. How residents move around was the leading challenge identified in 2017 for the next four years, owing to congested roads and tack of public transport. This theme is evident in other consultations where there are frequent references to improving traffic, active transport and public transport.

In qualitative feedback, people acknowledge there is no simple solution to problems with transport and traffic. People draw a strong link between development, population growth and traffic congestion. This comes up in consultations related to transport but also in many other contexts, i.e. Iveability and preservation of the area. Many participants indicated that the cause of increased traffic is "over development" in the Northern Beaches area and that limiting future urban development should be one of Counci's priorities.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 24



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS

PARKING

Parking as a related issue receives considerable attention. This is more important to residents in the southern parts of the LGA (i.e. Manly, Dee Why and Frenchs Forest) than in areas further north. In one consultation, there was a particularly strong focus on road and parking infrastructure in Manly, with most people believing this was an area requiring more effort from Council. This was primarily because of the high demand for parking around Manly, the perceived inadequary of Council rangers policing parking signage.

Parking for motorcycles is becoming a priority, which people feel should be addressed as part of the transport strategy, with motorblike and scooter users included as a separate group. People feel that traffic congestion has led to the increased use of these vehicles, and there is a need to make it possible for these users to share the road with bigger vehicles, and manage parking options.

INVESTMENT IN INFRASTRUCTURE

Many prioritise further investment in public transport infrastructure to create a more efficient transport network for the Northern Beaches. Some suggestions include using existing infrastructure for dedicated bus lanes and creating feeder options linking residential areas with tran stations, which would help to create an efficient road network.

BETTER CONNECTIVITY

The efficiency of the existing road network could be improved through greater efficiency in the public transport network, with better connections to places beyond the Northern Beaches area helping to provide more frequent, direct and efficient public transport. People msking this suggestion preferred improving the efficiency of the existing network to providing additional road infrastructure for the Northern Beaches.

Ferry services were also frequently mentioned as a public transport option to increase connectivity between the Northern Beaches and the Sydney CBD. Participants specifically mentioned that the Clontarf CBD and Manly CBD connections required further investigation.

PUBLIC AND COMMUNITY TRANSPORT

Residents indicated that they are eager to consider alternative travel options, such as public and active transport, to reduce current road congestion. There is strong support for Council taking on a stronger advocacy role when fielding with State Government on transport and traffic issues.

Public and community transport options are considered the best way to manage traffic congestion issues. Participants indicated that better use of road infrastructure would achieve better bublic transport travel times and encourage public transport use. Solutions such as clearways and dedicated lange for public transport during peak hours were identified as options to consider.

'Dedicated bus lanes are the answer for the Northern beaches and Park and Ride Car Parks.'

One of the main concerns relates to frequency of current bus services, specifically the B-Line services and after hours (or late night) services. Providing feeder buses for the B-Line services was repeatedly mentioned as a way to increase public transport use.

INTEGRATED TRANSPORT AND LAND-USE

Consultation in this area revealed concerns about the current need to travel to and from the Sydney CED. Several participants indicated that activating town centres could provide local job opportunities and reduce the need for people to travel in and out of the Northern Besches. Participants also agreed with the need for well-designed urban development, which integrates different transport modes with land-use and addresses current population growth. However, the potential to provide mass transit systems attracted contrasting community opinions, cirectly urban development.

The consistency of community thinking in this issue is demonstrated in the most recent consultation, LSPS 2019, where key concerns included addressing traffic generated by increased density; strengthening public transport; overcoming reliance on cars and resulting congestion, by providing improved, further-reaching, culcker and more alfordable public transport; continually improving cycleways and walkways; more and longer bus lances; more restricted bus stops in peak hour; more fast ferries from Maniy to Sychey CBD) and eddressing school traffic (e.g. through improvements to bus services and staggered school times).

32 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRORITY AREAS

Alternate transport models

EXPANDING FERRY TRAVEL

People love travelling by ferry: Wanderful to be able to travel into the city by ferry and now with the fast ferry ranning even more frequent it is so quick'.

Most comments around ferries related to connections and expansion of options. Many mentions were made regarding active travel and efficiency of the need for better connections to, and facilities supporting connections with, ferries, particularly the Manly ferry. A number of suggestions for expanding the options for ferry travel include a Pittweter Ferry to access Palm Beach and Mone Vale, possible ferry services from various bays, small feeder minibus service, a Mona Vale Ferry offshore to Dog Park Wharf, ferry from Reseville Chase to the city and extending a central coast ferry to Mona Vale.

Ferries were seen as a possible solution to some areas of traffic congestion, for example, *'regular ferry services from* centres such as *Clantarf that would effectively reduce the congestion and battleneck that Spit Road, Mosinan through and along Military Road to Neutral Bay'*. Cost of travel on ferries is an issue for some, with the harbour option (ferry/fest ferry) once being equivalent in cost to buses but is now neerly double. Subsidialing ferry use would probably be far cheaper than building infrastructure using the roads (or a tunne).

NEXT GENERATION TRANSPORT MODELS

Some initiatives were proposed to develop strategies to identify next generation transport models and the required business case to support them. Some recognise 'the massive impact that automotive technology changes will have with self-driving cars that is likely to happen in the next 10 years. This is seen as a significant factor in making car transport much more efficient, 'hopefully the arrival of the driverless cars will solve the traffic choking'. People offering these ideas think it is critical for council to plan ahead for electric cars and one respondent said they would like to see Council members. driving electric cars and using public transport themselves. Community views on the potential use of autonomous vehicles on Northern Beaches roads revealed a desire for caution, with further research needed about implementing driverless technologies. As the safety and efficiency of this alternative technology are yet to be proven, general community perceptions were conservative.

Some also identified the need to encourage/develop systems, technology, and so on to encourage more people to share cars during peak hours.

Mass transit

There are a range of perspectives on mass transit—some see a combination of mass transit and active transport working well together to reduce congestion, whereas others view mass transit as equal ing overdevelopment.

A feeling that there should be more pressure on the State Government to solve public transport issues, e.g. underground metros and bypasses, "*Council should grab* the nettle and with its increased scale push for new and improved trank roads (e.g. direct connection from Wokkhurst Parkway to Burnt Bridge Creek Deviation) plus train line".

A number of residents indicated that mass transit systems such as trains or light rail should be improved to cater for current population growth. Suggestions for major corridors included two lanes along Mona Vale Rd and Wakehurst. Parkway, fixing of the Narrabeen bridge and the elevation and widening of the Wakehurst Parkway to deal with floods and increasing traffic.

The Northern Beeches Tunnel is seen as important for improving traffic flows to and from the Northern Beaches. It will ease congestion on Warringah Road and the Spit Bridge/Spit/Military Roads and allow greater cross connectivity to other areas of Sydney. This would also provide access to the proposed third road harbour crossing to M4 and Badgerys Creek Arport.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 33



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS

Efficiency

Environmental sustainability

The word 'sustainable' was used in the context of sustainable development, protecting the environment, waste minimisation, reducing energy and water consumption and elevating climate change as a key issue in planning for growth.

Community feedback highlighted the value the community places on environmental sustainability and the need to change behaviours around reducing single use plastics, conserving energy and reuse and recycling at events.

Suggestions for more sustainable built environments included efficient water use, support for solar power, new buildings with sustainable products that blend into the environment and the promotion of clean energy. New precincts are an opportunity for sustainable development.



34 - NORTHERN TEACHES COMMUNITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



PRIORITY AREAS



Resiliency

Natural hazards and pollution

Few areas addressed these issues. The need to evacuate for emergencies such as bushines is mentioned in the ingleside development consultation, and urban heat and the role of the tree canopy was identified by some community members in discussions about urban tree cover. Natural heaters of flooding and erosion were briefly mentioned for protecting the cosst and waterways.

Pollution as a central theme is mentioned in a number of contexts, with noise pollution an issue for residents in urban areas from traffic, dogs and leaf blowers. Waste pollution is a problem in streets, beaches and waterways, with respondents calling for better catchment management and waste practices to stop rubbish going into creeks and onto beaches during storms.

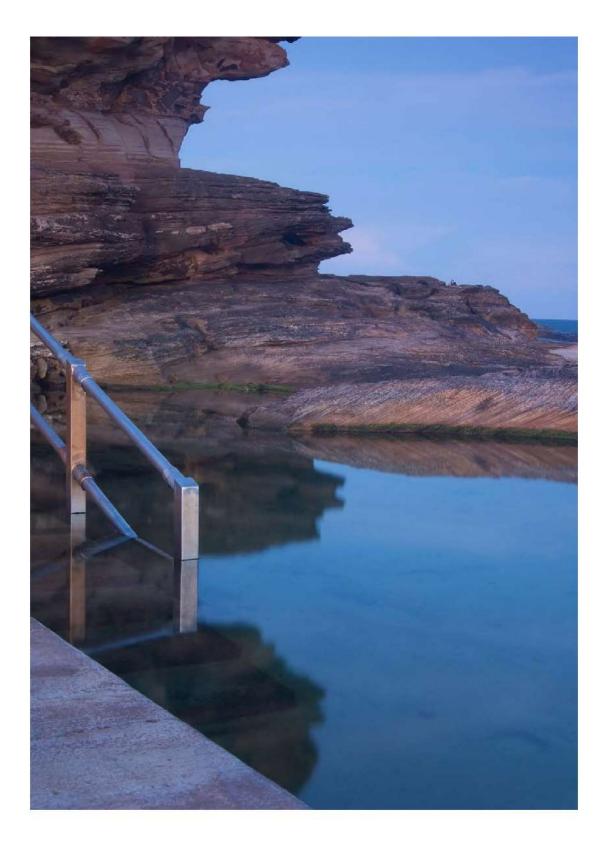
Air quality is being affected by wood heaters in winter, which is considered endemic in the Northern Beaches and there are calls for a policy to control this. Some benefits were identified for improving transport networks and active travel relate to the potential to reduce pollution from cars, while there are concerns about the pollution from heavy trucks and tunnel emission stacks.

NORTH RN FLACHTS COMMUNEY ENGAGEWENT ANALYSIS = 35



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)







Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



CONCLUSION

Conclusion

This report has reviewed a wide range of community engagement reports. While they focus on different priorities and geographic areas within the local government area, community sentiment on key issues remains consistent over time.

Core values identified in the early consultations have remained consistent throughout. Residents value the unique lifestyle they feel living on the Norther Beaches alfords them, and have a keen wish to preserve this in the face of development pressures. The values that underpin this lifestyle are about belonging to a distinctive community, safety, and work life balance. Residents strongly value the community in which they live. This includes the filterofiliess of people, the social life in the area and the village teel the area has.

Concern about development is voiced in nearly all consultations. The impact on transport, traffic congestion, population growth, housing affordability and the environment are constant themes. Fear of change is really the fear of loss of what they have now end a sense of not having any control. Whilst many accept growth is "nevitable", they ergue strongly for development to be controlled, and infrastructure provided to support growth. It has been observed that opt-in methods of consultation and requests for suggestions can ake to negative responses. This is evident in much community feedback, however, while negative sentiments may be expressed about the impact of development and other issues, there is also great enthusiasm for initiatives that build community, cultural and lifestyle opportunities.

NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS - 37



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



APPENDIX.

Appendix 1 Project List

APP	ENDIX 1 PROJECT LIST
2016	5
1	2016 Community Strategic Plan CE Report Stage 1
2	2016 Draft Mona Vale Place Plan Public Exhibition and Consultation Outcomes Report
3	Community Engagement Policy and Matrix 2017 Summary of Submissions
4	Northern Beaches Council: Department of Premier and Cabinet survey results
2017	,
1	Community Engagement Report, Draft Northern Beaches Sportsgrounds Strategy - Final July 2017
2	Northern Beaches Council – Sportsgrounds Colf Courses Discussion Paper – Community Engagement Report, May 2017
3	Community Strategic Plan Community Engagement Report Stage 2
4	Community Strategic Plan Community Engagement Report Stage 3
5	LRC Presentation 31052017 – Stage 2 Community Engagement on Community Strategic Plan
6	Micromex Report - Brand Identity Desk Research - 2017-03-14
7	Community Satisfaction Survey - Micromex report July 2017 FINAL
8	ingleside submissions overview report, 25 October 2017
9	New Creative Space – Summary of Community engagement findings phase 1, 17 August – 2 October 2017, FINAL
10	Place Score – Frenchs Forest (1)
11	Report_on_consultation_for_the_Northern_Beaches_DIAPHNAL
12	Response to submissions hospitals report 2017
2018	3
1	YSNB Shape 2028 Attachment 2 Community Engagement Report – Community Strategic Plan, Stage 2
2	Report: Northern Beaches Council, Community Research, 16 July 2018 Final
3	CE Summary Report Arts & Creative- 27 November 2018 (3)
4	Comment Form Of My Place Avelon 22 February 2018
5	Place Partners – Avaion Place Score Community Insights Report – My Place Avaion
6	Community Engagement Report – Beaches Link Tunnel Submission – v4.0
7	Brookvale Structure Plan 2018 - Response to Submissions Report

38 - NORTHERN BEACHES COMMUNITY ENGAGEMENT ANALYSIS



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



APPENDIX

APP	ENDIX 1 PROJECT LIST						
201	B CONT.						
8	Report – Scenarios Report, Brookvale, 10 May 2018						
9	Report - Brookvale Submissions Report						
10	Agenda of Ordinary Council Meeting - Creative art space 2019 (1)						
11	Northern Beaches FGD – Environment Strategy						
12	FINAL Northern Beaches Environmental Perceptions Survey Benchmark Report – Combined Report – Instanct and Reason						
13	Long Reef Surf Life Saving Club Stage 2 Engagement Report – January 2019 (4)						
14	Draft-CES – Mona Vale Performance Space (2)						
15	180921 Transport CIR Mone Vele Town Centre 1.0LR						
16	Placescore-Community Insights Report – August, 2018 (2)						
17	$\label{eq:constraint} Appendx \ D-Revised \ Written \ submissions \ Move \ Northern \ Beaches-August$						
18							
19	Draft Three (2)						
20	Engagement Summary Report - MVSLSC - Final Oct, 2018						
21	Northern Beaches Walking Plan Community Engagement Report Phase 1						
22	Delivery Program CE Report Stage 2						
23	FINAL REPORT - Delivery Program community engagement - Etion 6 Dec						
24	Event Strategy – Engagement Summary Report, 26 June 2018						
201	9						
1	DRAFT Bike Plan Stage One Engagement Report						
2	DRAFT - Consultation Summary Report - Community Centre Strategy - 20181015						
3	NBC LSPS SRG Workshop Report FINAL 080319 with appendices						
4	Place Score – Final LSPS Insights Report 2019						
5	Community Engagement Draft Report – Public Art 2019						
6	LSPS Post Registration Survey RESULTS 04.03.2019						
7	NBC LSPS Engagement Report FINAL						

NORTHERN BEACHES COVIMUNITY ENGAGEMENT ANALYSIS - 39



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

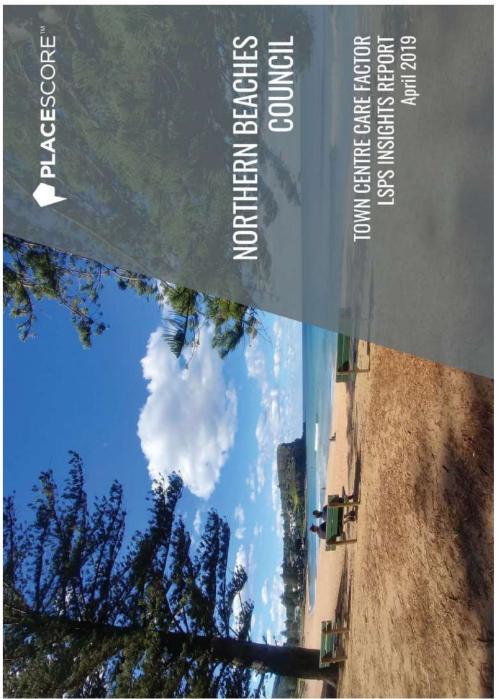


Northern Beaches Community Engagement Analysis DR JANNET PENDLETON JUNE 2019



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)





8.2 Appendix Two: Northern Beaches Placescore LSPS insights report

beaches council

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



ABOUT PLACE SCORE AND THIS RESEARCH

USING PLACE SCORE FOR YOUR LEP UPDATE

Place Score has been working with both Local and State Government to identify priorities in town centres and neighbourhoods based on whom we consider to be the experts - the people living and experiencing these places everyday.

attributes. The attributes have been categorised against the Greater Sydney Our Town Care Factor tool is composed of 50 different town centre related Commission's directions to act as indicators. This L5³S Insights Report also features analyses of an open-ended question providing an additional community input for strategic planning.

WHERE AND WHEN WAS THIS DATA COLLECTED?

Centre Care Factor surveys for the Northern Beaches Council LGA via online and face-to-face surveys. This data provides insights for Council's L57S. Only data collected from residents of the Northern Beaches was used for this report. Between 11th May 2018 and 1st July 2018 Place Score collected 2198 Town

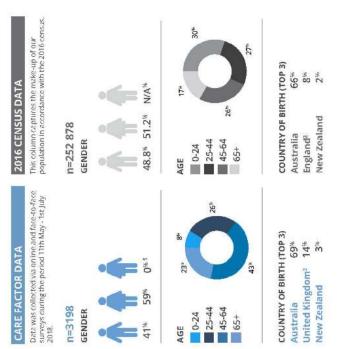
TOWN CENTRE CARE FACTOR SURVEY

Which place attributes are most important to you in your ideal town centre? Respondents were asked 'What is your big or small idea to make your 3198 residents from across the LGA

town centre better?"

1.716 people shared their iceas. The antine survey was live from 1.1th May 2018 to 1st July 2018.

ABOUT YOUR RESPONDENTS









WHAT A PLACE IS... AND WHAT IT WANTS TO BE

your community's desired place experience; that is, the attributes that are most the Northern Beaches Local Government Area. While your Town Centre Care Your LSPS is fundamentally a 20-year vision for the future land uses across Factor data is not specifically focussed on land use, it is valuable in defining important in their ideal town centre / main street environment.

population that wants to be proximate to amenity. As such they service a higher Town centres are particularly important for communities, they are the focus for economic exchange, local jobs, socialisation, gathering and celebration. They tend to be the node for transport and as such attract higher densities and a percentage of the community and should reflect local reeds and values.

Community values regarding these special shared places can be extrapolated over the wider LGA to help shape your vision for the future.

FOLLOWING ELEMENTS SHOULD BE CONSIDERED AS THEY SUMMARISE WHAT YOUR COMMUNITY SELECTED AS THEIR TOP CARE FACTORS: WHEN PLANNING FOR THE FUTURE NORTHERN BEACHES, THE



Cleanliness and maintenance of public spaces and infrastructure



Public spaces that are attractive and welcoming to a diverse range of people

4

Legible and safe walking and cycling paths and public transport

ណិ





northern beaches council

Notex



ATTACHMENT 3

Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019





FACTOR INPUTS OF OVER 3000 NORTHERN BEACHES RESIDENTS TO IDENTIFY FIVE KEY COMMUNITY INSIGHTS FOR THE FUTURE. SUMMARISED THE TOWN CENTRE CARE PLACE SCORE HAS REVIEWED AND



"More natural vegetation surrounding the area [...] greater integration of nature into public spaces." FEMALE, 15-24 YEARS OLD Protect and retain existing landscape areas and tree canopy

 Use landscape or vegetation as a unique point of difference in newly developing areas

 Ensure there is no net loss of vegetation in developing areas

points by integrating a publidy accessible look out Retain view corridors to the sea or feature high

reu vian dimensi and occording judiment am bosto on the top. 10 can extinct for the internet internet induction that here ground by border and the resolutions in the requirement of the extension of a sportfactur. Even your incordinations have been developed by index core as estanded of decaracity the requirement of the extension of regions. Even your incordinations have been developed by index core as estanded of decaracity decaracity and index estandards in the point incordinations have been developed by index core as estanded of decaracity decaracity and index estandards in the point incordinations have been developed by index core as estanded of decaracity decaracity of the second of the point incordination of the point incordination of the second of the

Notes

PLACESCORE



of public spaces and

'Better cleaning of public facilities. Bins, toilets FEMALE, 65-84 YEARS OLD piaza areas [...]."

- Plan for the ongoing care, cleaning and maintenance of facades, shared or public spaces and amenities
- Consider materials that look clean and are easy to maintain over time

Place Score 02015 P.4 Nordhem Beaches Council 2575 Insights Report April 2019



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



LSPS INSIGHTS (3/3)



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

northern beaches council





	northern beaches council
--	--------------------------------

REGION PLAN AND PLACE ATTRIBUTES

A SAFE, CLEAN, WALKABLE, FUN, GREEN AND COMFORTABLE NORTHERN BEACHES The Greater Sydney Commission's Region Plan sets out 10 directions. Out of these, six are aligred with Place Score's Town Centre Care Factor. This tables illustrates the top two Place Score attributes your community cares the most about - in regards to each of your Region Plan's directions.

ž L	NORTHERN DISTRICT PLAN DIRECTIONS	TOP TOWN CENTRE COMMUNITY VALUES	NORTHERN BEACHES LGA	SYDNEY METRO AVERAGE
0	Celebrating diversity and	Sense of safety (for all ages, genders, day/night etc.)	45.1%	51%
2	putting people at the field	Evidence of public events happening here (markets, street entertainers etc.)	37.9%	41%
c	- I and the second s	Cleanliness of public space	64.8%	65.9%
ř.	Designing places for people	Overall look and visual character of the area	54.3%	48.6%
	Developing a more	Ease of walking around (including crossing the street, moving between destinations)	47.8%	43.1%
acc	accessible and walkable city	Walking paths that connect to other places	39%	36%
Le	Creating the conditions for a	Outdoor restaurant, cafe and/or bar seating	58.1%	48.6%
	stronger economy	Things to do in the evening (shopping, dining, entertainment etc.)	38.6%	39.1%
N	Valuing green spaces and	Elements of the natural environment (views, vegetation, topography, water etc.)	71.8%	63.8%
	landscape	Vegetation and natural elements (street trees, planting, water etc.)	55.6%	51.5%
-	Adapting to a changing	Physical comfort (including noise, smells, temperature)	17.7%	22.4%
	world	Shelter/awnings (protection from sun, rain etc.)	10.6%	13.7%

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



ATTACHMENT 3 Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019

> Place Scores2015 36 Nordhem Beaches Council __575 Insights Report _ April 2019

to the tor

. Only the derich site conversion with Place Versie Josef contra armanetiest of state, Alarty States Socies, A David period the catalose lysting by the Greater Sjoriey Commission, benchmark data as of Fernary 2019.

Notex

PLACESCORE



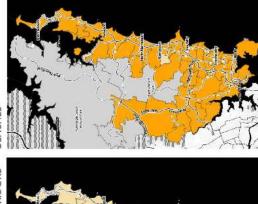
REGION PLAN HIGHLIGHTS

Place Score has analysed specific attributes related to your Region Plan to highlight trends and core values by suburb and across your LGA:

'CAR ACCESSIBILITY AND PARKING' IS HIGHLY VALUED IN AREAS WITH LESS PUBLIC TRANSPORT CHOICE

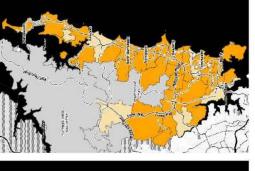
ARE HIGHLY VALUED ALONG SOME URBAN CORES / BUS CORRIDORS ACTIVE AND PUBLIC TRANSPORT

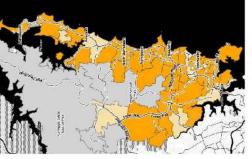
VALUE ACROSS THE NORTHERN OUTDOOR DINING IS A CORE BEACHES



d'ay

GREENERY IS IMPORTANT TO MOST OF YOUR COMMUNITY





 n <10
 Highly vulned
 Newfol
 Less volued LEGEND

Place StoreG2015 2.7 Nordhem Beaches Council __575 Insights Report _April 2019

wite activities executive start attracts were care than from 10 antichons for activities and activities were 5 kill and/shore sets. Heigh World - Seglicardy stores from 55 kills arreprodent. Restard - Second activities for sponder start activities and a

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



northern beaches council

Notes

ATTACHMENT 3 Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019

Page | 62

Name of Street



LOCAL CHARACTER - WHAT MAKES US UNIQUE?

ELEMENTS OF THE NATURAL ENVIRONMENT IS THE ONLY UNIQUENESS ATTRIBUTE' IN THE TOP 10 CARE FACTORS FOR THE NORTHERN BEACHES.

Wr en considering local character, examine what makes your places unique. This table the percentage of people that care about a specific *Uniquences* attribute by ward and offers a comparison with the Northern Beaches and Sydney Metro average.

UNIQUENESS ATTRIBUTES	METRO			FUKES			
Elements of the natural environment (views, vegetation, topography, water etc.)	64%	72%	71%	65%	75%	72%	74%
Local history, heritage buildings or features	49%	38%	37%	34%	43%	41%	37%
Public art, community art, water or light features	30%	3196	31%	32%	30%	28%	32%
A cluster of similar businesses (food, cultural traders, fashion etc.)	30%	31%	30%	40%	27%	31%	27%
Landmarks, special features or meeting places	30%	29%	28%	29%	26%	38%	27%
Unusual or unique businesses/shops	23%	25%	23%	28%	23%	22%	26%
Point of difference from other similar streets or places	19%	22%	23%	22%	19%	19%	23%
Unusual or unique buildings or public space design	18%	19%	23%	22%	22%	17%	17%
Unusual mix or diversity of people in the area	22%	18%	18%	18%	19%	17%	17%
One of a kind, quirky or unique features	17%6	17%	17%	12%	14%	15%	20%









Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



TRANSPORT

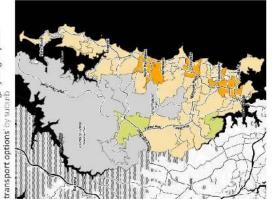
THE FURTHER AWAY PEOPLE LIVE FROM HIGH VOLUME PUBLIC TRANSPORT SERVICES SUCH AS THE B-LINE, THE MORE THEY VALUE CAR ACCESSIBILITY AND PARKING. BETTER PEDESTRIAN AND CYCLE PATHS & PUBLIC TRANSPORT OPTIONS WILL REDUCE THE DEPENDENCY ON THE PRIVATE VEHICLE.

	public transport options	and parking
Sydney Metro Average	38%	35%
LGA Average	37%6	37%
Avalon Beach	33%	27%
Frenchs Forest	29%	52%
Dee Why	49%	32%
Newport	38%	29%
Manly	46%	25%
Mona Vale	37%	35%
Forestville	18%	49%
Narrabeen	62%	31%
Freshwater	44%	20%
Balgowlah	52%	28%
Collaroy	43%	40%
Belrose	27%	54%
Bilgola Plateau	21%	45%
Cromer	-42%	52%
Warriewood	34%	36%

How much we value 'Walking, cycling or public

Car accessibility

Walking, cycling or



How much we varue 'Car accessibility and parking' overshore

n <10
 Highly valued
 Neutral
 Less valued

LEGEND

ATTACHMENT 3 Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019

Place Score 2015 - 210 Nordrem Beaches Council - 575 Insights Report April 2015

arp solver severatives of attracts may correlation than to another visual at the ools on downmoding to previous of modern viscore the course correlation of attracts then the toke only statises the solution visual correlations to assist of 5.5% statises to the course descore on other with a statise to according to a solution of a statise to a statise of 5.5% statises instanting advantation of statisments. This in provided to the solution of the course of 5.5% statistical attra data and attracts of a statistic of the statisments. This is non-tractise to an other resonance to the statisments assist data and other out transition is counted to the statisments. This is non-tractistical on the Care Fatter surged could be a required entradata and other out transition is counted at the statisment and there is no statisment and attract where a statisment and attracts attracts and a statisment as a statisment of the care fatter and attracts at the statisment and attracts attracts and attracts att

Notex

PLACESCORE

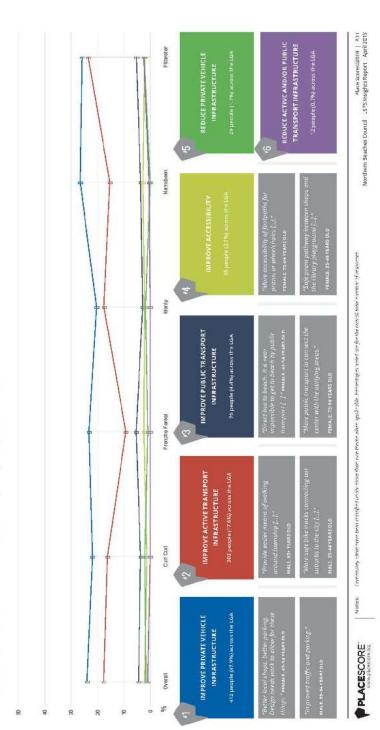




COMMUNITY IDEAS ABOUT TRANSPORT



Place Score asked survey respondents 'What is your big idea to make your town centre better?'. 1716 answers were collected. Here are the mos: common themes regarding transport for each Ward:













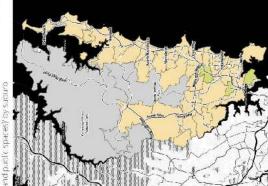
LIVEABILITY

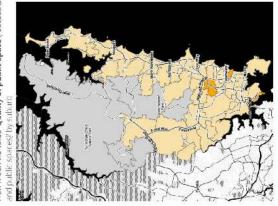
A PRIORITY FOR THE COMMUNITY, THIS COULD MEAN THAT CURRENT LEVEL ARE PERCEIVED AS MEETING LOCAL NEEDS. HOWEVER, THERE IS SLIGHTLY COMMUNITY. GENERALLY THE AMOUNT AND QUALITY OF PUBLIC SPACE IS NOT MORE VALUE PLACED ON QUALITY OVER QUANTITY IN YOUR TOWN CENTRES. WITH EXPECTED POPULATION INCREASES QUANTITY COULD BE COME AN LIVEABILITY IS ALL ABOUT THE SHARED SPACE AND WELL BEING OF OUR INCREASING CONCERN.

D.C.D.	A Dev	Concession of the
37%	25%	Metro
Quality of space (foc and public	Amount of public space (footpaths and public spaces)	

Quality of public	How much we value 'Amount of public space (footpaths
space (footpeths	and public spaces? by suburb
and public spaces)	
and the second se	

	airu puursperest	and public spaces
Sydney Metro Average	25%	37%
LGA Average	29%	36%
Avalon Beach	28%	34%
Frenchs Forest	32%	32%
Dee Why	29%	42%
Newport	32%	30%
Manly	32%	36%
Mona Vale	33%	29%
Forestville	25%	29%
Narrabeen	35%	35%
Freshwater	36%	38%
Balgow ah	25%	40%
Collaroy	43%	27%
Belrose	26%	29%
Bilgola Plateau	25%	45%
Cromer	32%	41%
Warriewood	19%	45%





How much we value 'Quality of public space ("cotpaths

n <10
 Highly valued
 Neutral
 Less valued

LEGEND



Plare Stare020.15 - 2-13 Nordhern Beaches Council _575 insights Report April 2019

arpointent event the start of armoust my correctional from 10 ambient store and an onder annotation of anderet we have that ambies as the graphaters then the table only iterations the sounds and one of instances of 5.56 ambiest and and an so-the nonzero bases on one-on white a diverse only **iterations** the sounds on a sound sound and a free. The congrues on an experiment can worked agriculture for an 1586 or representation. The instances have and the sound area on the more sounds and sounds and on on an instances of an analysis of the hard on the sound broad on the Cane Farty and produced area in a sound of and on on a transmission of an analysis. This is non-transmission of the Cane Farty and produced area on sounds and on on a transmission of an analysis. The sound broad on the Cane Farty and produced by a reference on sounds and on on a transmission of an analysis. The sound area of the farty and produced by a reference on the cane of the can

Votex

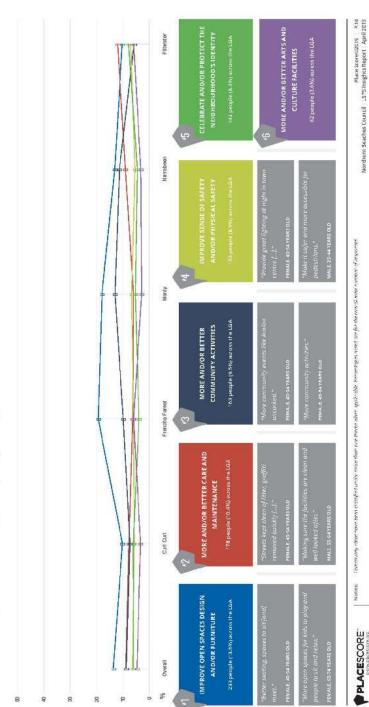
PLACESCORE





COMMUNITY IDEAS ABOUT LIVEABILITY

PUBLIC SPACES THAT ARE WELL DESIGNED, LOOKED-AFTER AND OFFER THINGS TO DO Place Score asked survey respondents '*What is your big idea to make your town centre better?*'. 1716 answers were collected. Here are the most common themes regarding liveability for each Ward:



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)













PRODUCTIVITY

SOCIALISING IN THEIR CENTRES. SOME SUBURBS ALSO STAND-OUT WHEN IT COMES TO EVENING ACTIVITIES - CONSIDER INVESTIGATING PRODUCTIVITY CAPTURES ECONOMIC ATTRIBUTES. INTERESTINGLY YOUR COMMUNITY HIGHLY VALUES OPPORTUNITIES FOR WHAT IS CURRENTLY ON OFFER IN THESE AREAS.

Things to do in the evening (shopping, dining, entertainment etc.)

restaurant, cafe and/or bar seating

49% 58% 55% 66% 52%

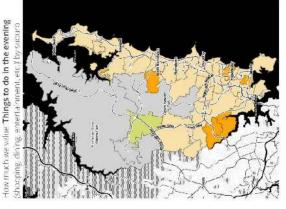
Sydney Metro LGA Average

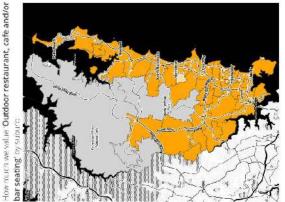
Outdoor

9665

3756 48% 96.1 33% 3496







42%

Mona Vale Forestville

Manly

9655 80% 58% 2:156

Newport Dee Why

55% 32% 49% 38%

70%

Freshwater Narrabeen

Balgowlah

Collaroy

Belrose

63% 218 64% 66% 4655 56%

52%

3896 4:02 4196 96.1

Bilgola Plateau

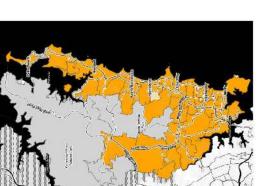
Warriewood

Cromer

2596

Notes

PLACESCORE





Place Scare020.15 - 2.16 Nordhern Beaches Council _5.75 insights Report April 2015



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

Frenchs Forest

Avalon Beach

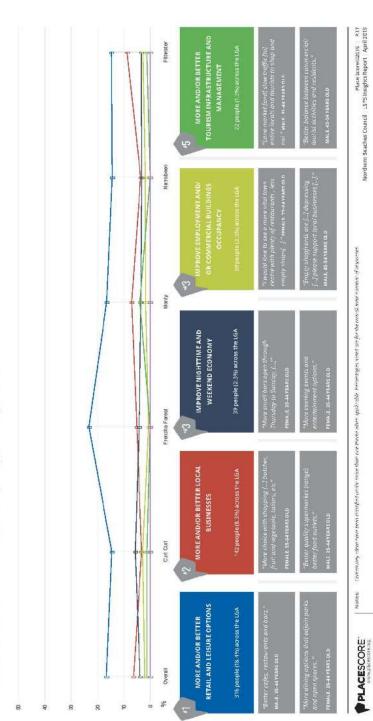
ATTACHMENT 3 Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019



COMMUNITY IDEAS ABOUT PRODUCTIVITY



Place Score asked survey respondents 'What is your big idea to make your town centre better?'. 1716 answers were collected. Here are the mos: common themes regarding productivity for each Ward:



ATTACHMENT 3

Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019



711







Page | 73

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)





SUSTAINABILITY

TOWN CENTRE ATTRIBUTES ASSOCIATED WITH SUSTAINABILITY ARE FOCUSSED ON VEGETATION, ITS CARE AND ACCESS TO NATURE. VEGETATION AND ACCESS TO NATURE IS IMPORTANT TO YOUR COMMUNITY - BUT SLIGHTLY MORE PEOPLE CARE ABOUT THE PRESENCE OF VEGETATION THAN HOW IT IS BEING CARED FOR.

1	2	
tur	E)	
na	100	7
and r	vate	1
ion	Su	
etatio	lantir	
get	e pla	1
Ve	ees,	21
Lle	5	1
22	street	11
WE	(str	
much v	ents (s)	Start Start
E	eme	1
õ	elei	

dy suburb		-				
hetc.)" CV					A	
, water,		12	×	4		
planting		Calevania -		3		ġÊ
elements (street trees, planting, water,	7	5		K	role une	and the
its (stree	\mathbb{N}	Į Į	ι. Γ	and and	(C)	of
elemen			Ľ		R	X

5195

64% 57%

Newport Dee Why

54% 2:96

> 46% 44%

> Mona Vale Forestville

VinaM

48%

48%

54% 50% 52%

Freshwater Narrabeen

Balgowlah

Collaroy

Belrose

58%

46%

41%

52%

55%

58% 47% 48% 5,8%

Bilgola Plateau

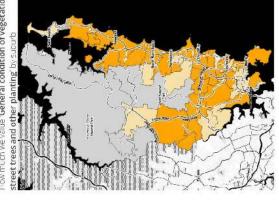
Warriewood

Cromer

5396 42% 5596

Notes

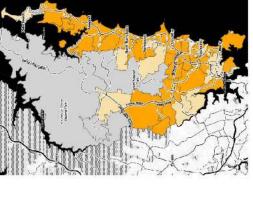
PLACESCORE

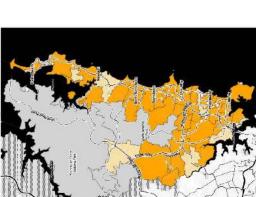


How much we value 'General condition of vegetation,

a ~10
 Highly valued
 Neutral
 Less valued

LEGEND









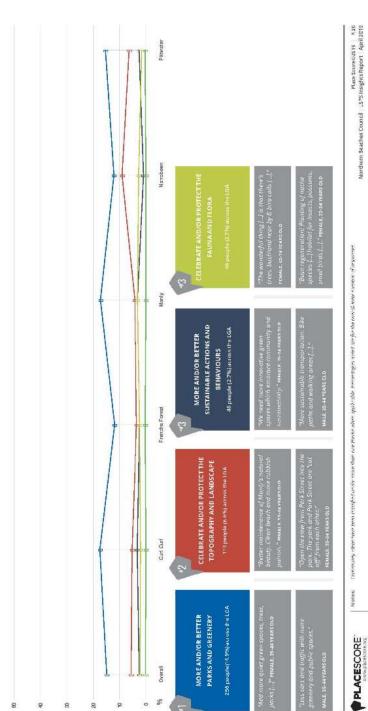
ATTACHMENT 3 Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019

Place Stare020,15 - 2-15 Nordhern Beaches Council - 575 Insights Report April 2015



COMMUNITY IDEAS ABOUT SUSTAINABILITY

GREEN PUBLIC SPACES AND CELEBRATION OF UNIQUE NATURAL FEATURES Place Score asked survey respondents '*What is your big idea to make your town centre better?*'. 1716 answers were collected. Here are the most common themes regarding sustainability for each Ward:

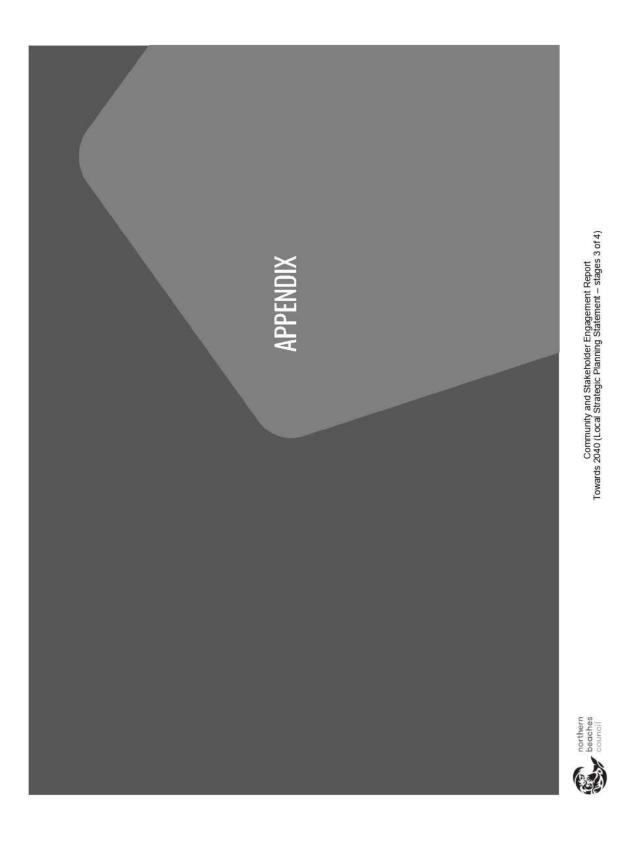


Page | 75

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

beaches council

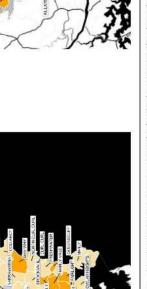


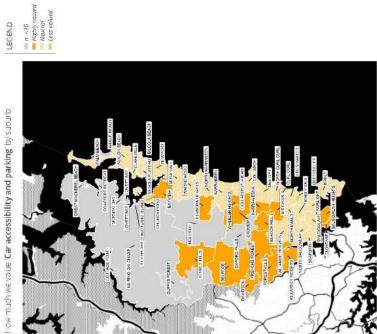






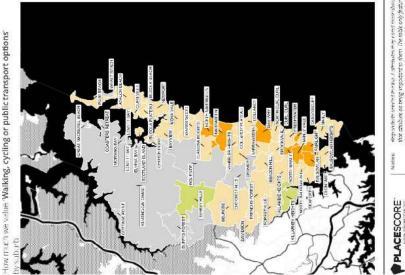
Place Score S2015 3.22 Nordsem Beaches Council ...575 Insights Report April 2015 Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4) wstervise i affreeder my canst mor akout fan 10 antebret teilte al tervisek en ekenomen ung fre pervensige of maketer nee. Net gruppstarter before i de sold only figster se autor sold ook of stato de de sold stato and ook i for oogsens po of no onzero with a sole cofferer with **Highly helder** - specificarly more noai Jobe transferent Neutral - opprander Jobe Jobe **valuet** - specificaries als in Big i gruppensite 376 on non-tervise hour of the Can Ferrer very performant Jobe Jobe J ettpontorte reverted the kup if uttrough that attrobute as terring verpontant to th the morpt are based on a miderio with responsiver, they valued "specification





1

A. TRANSPORT DETAILED MAPS









Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

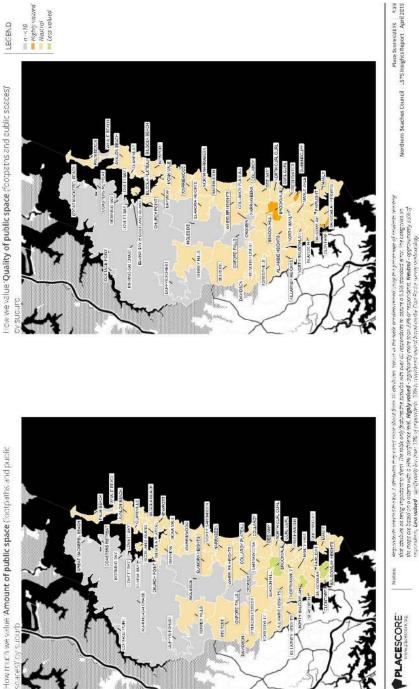


B. LIVEABILITY DETAILED MAPS



n <10
 Highly valued
 Neutral
 Less valued

LEGEND



il.

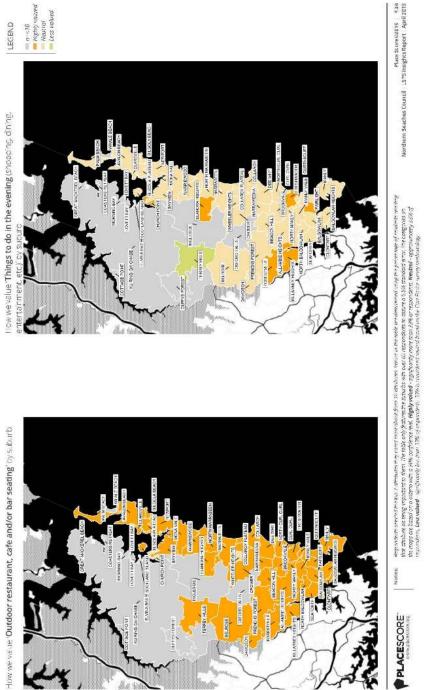




Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



C. PRODUCTIVITY DETAILED MAPS



.



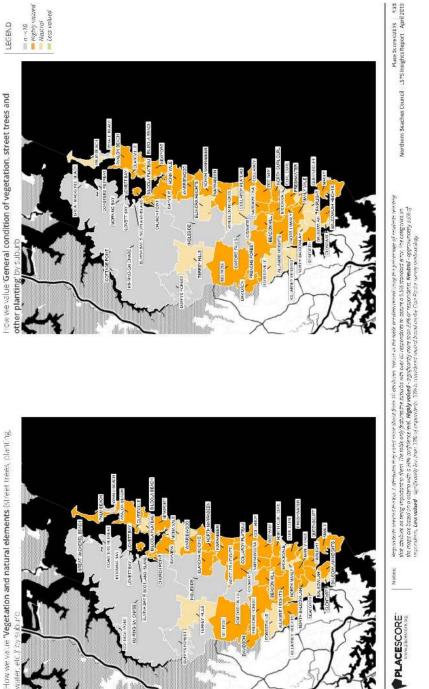


Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



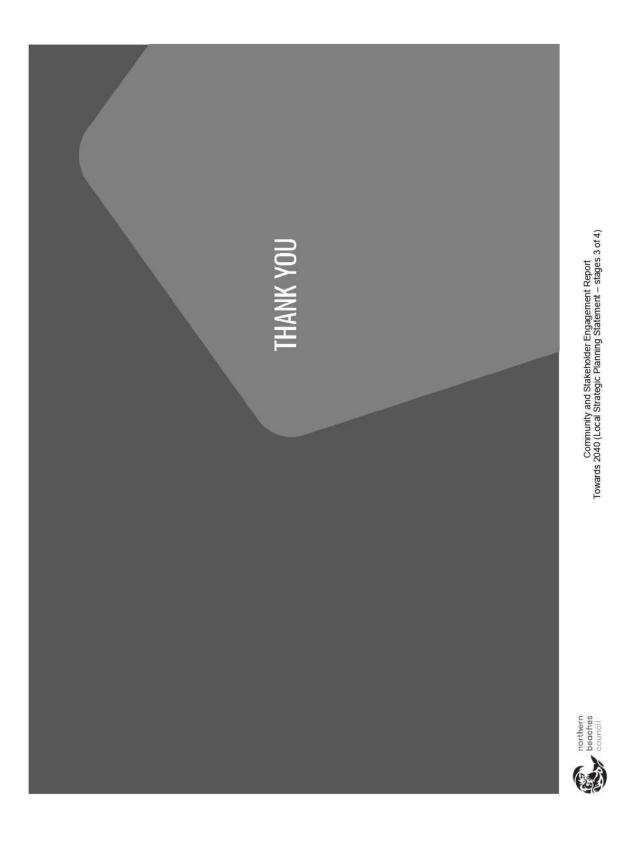
D. SUSTAINABILITY DETAILED MAPS





1

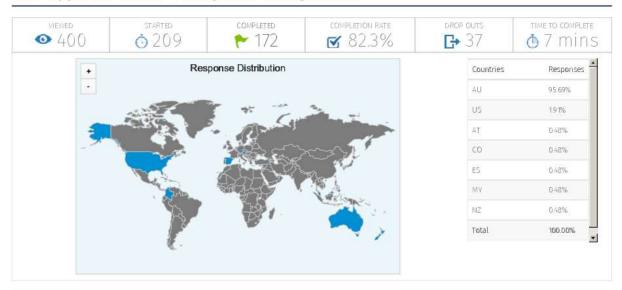


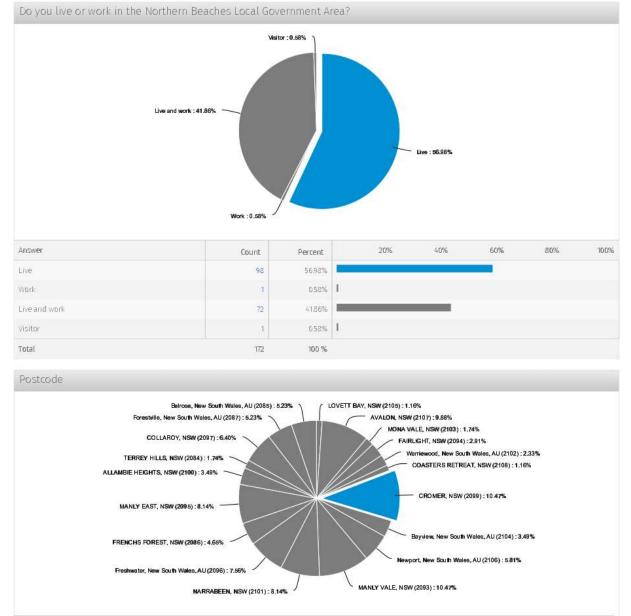




P QuestionPro

8.3 Appendix Three: Perceptions survey results





Post Registration LSPS Q1 2019

721

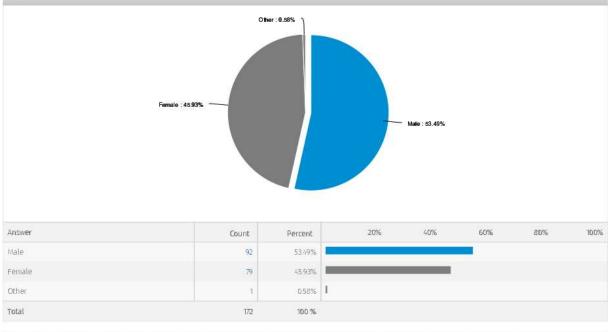


northern beaches council

ATTACHMENT 3 Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019

Answer	Count	Percent	20%	40%	60%	80%	100%
LOVETT BAY, NSW (2105)	2	1.16%	I.				
AVALON, NSW (2107)	- 17	9.88%	_				
MONA VALE, NSW (2103)	3	1.74%	1				
FAIRLIGHT, NSW (2094)	5	291%					
Warriewood, New South Wales, AU (2102)	4	233%					
COASTERS RETREAT, NSW (2108)	2	1.16%	1				
CROMER, NSW (2099)	18	10.47%					
Bayview, New South Wales, AU (2104)	6	3.49%	-				
Newport, New South Wales, AU (2106)	10	5.81%	-				
MANLY VALE, NSW (2093)	18	10.47%	_				
NARRABEEN, NSW (2101)	14	8.14%	_				
Freshwater, New South Wales, AU (2096)	13	7.56%	-				
FRENCHS FOREST, NSW (2086)	8	4.65%	-				
MANLY EAST, NSW (2095)	14	8.14%	_				
ALLAMBIE HEIGHTS, NSW (2100)	6	3.49%					
TERREY HILLS, NSW (2084)	3	1.74%	1				
COLLAROY, NSW (2097)	11	6.4%	-				
Forestville, New South Wales, AU (2087)	9	5.23%	-				
Belrose, New South Wales, AU (2085)	9	5.23%					
Total	172	100 %					

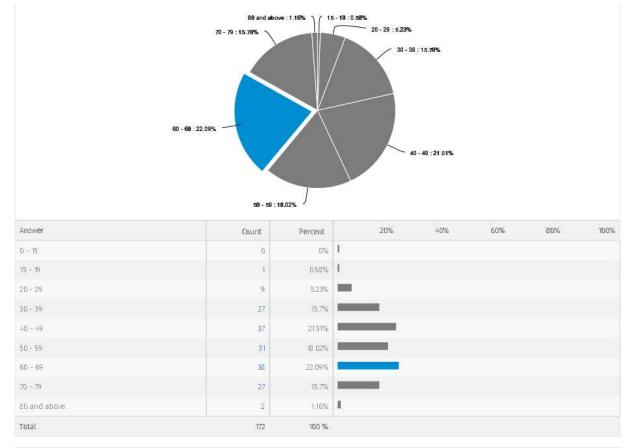
Gender



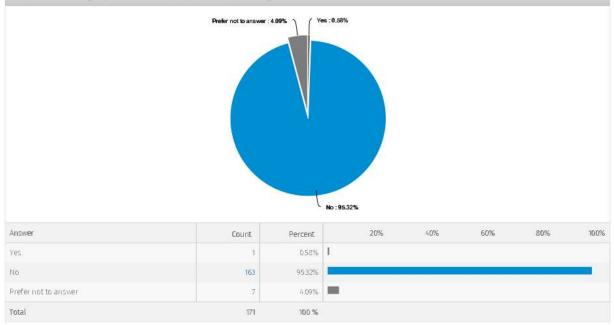
Age

Post Registration LSPS Q1 2019





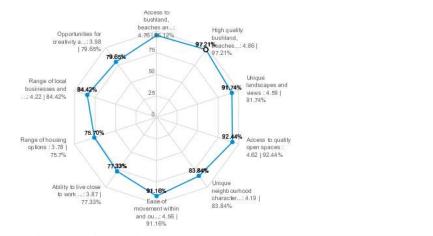
Are you of Aboriginal and/or Torres Strait Islander origin?



How important are the following to making the Northern Beaches and your local area an amazing place to live?

Post Registration LSPS Q1 2019

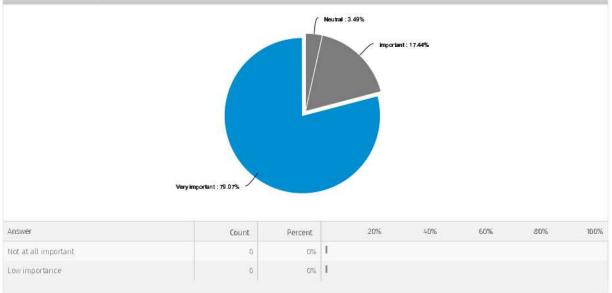




Powered by Al

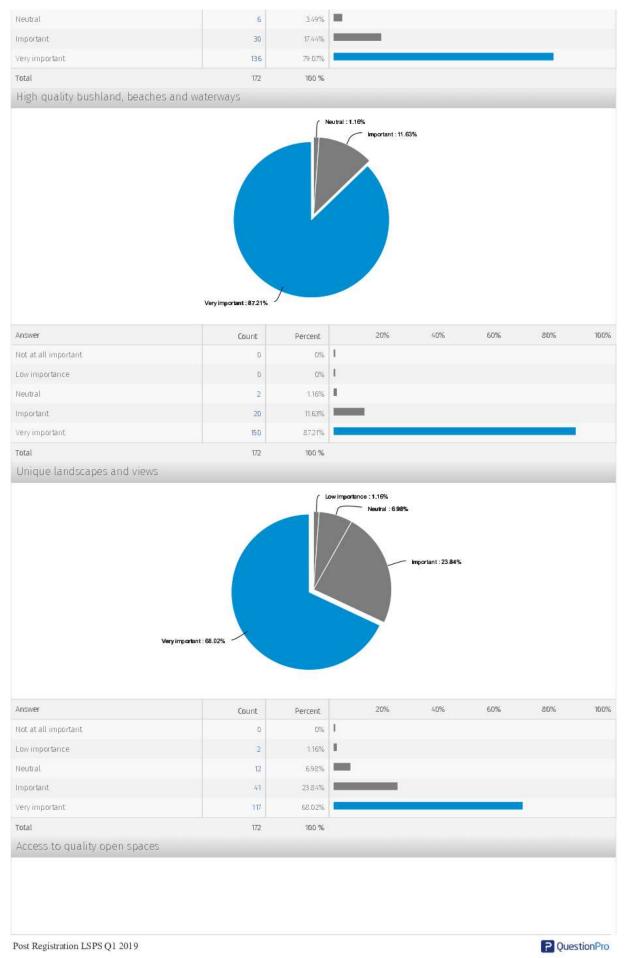
Question	Count	Score	Not at all important	Low importance	Neutral	Important	Very importan
Access to bushland, beaches and waterways	172	4,76					
High quality bushland, beaches and waterways	172	486					
Unique landscapes and views	172	4,59					
Access to quality open spaces	172	4.62					
A range of recreational opportunities	172	4.27					
Access to community services and facilities e.g. pools, libraries etc.	172	431					-
Unique neighbourhood character	172	4.19					
/ibrant town centres and villages	172	427					-
Ease of movement within and outside of the Northern Beaches	172	4.56					
Ability to live close to work and / or schools	172	3.87					
Relaxed lifestyle	172	4.43					
Range of housing options	172	3.78					
Sense of safety, community and belonging	172	4.55					
Range of local businesses and services	172	4.22					
Healthy and active community	172	4.45					
Opportunities for creativity and cultural expression	172	3.98					
	Average	4.36					

Access to bushland, beaches and waterways

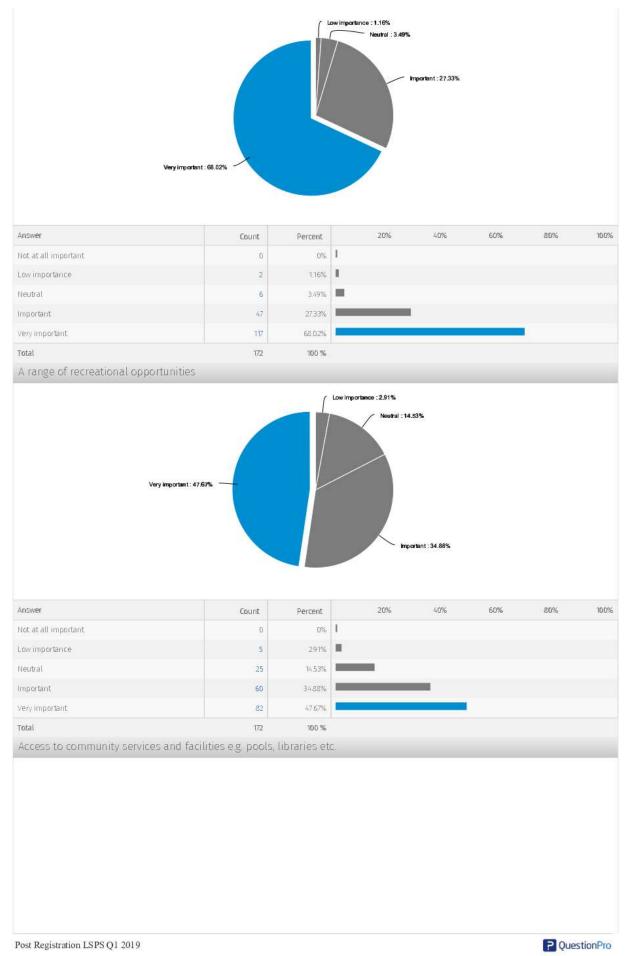


Post Registration LSPS Q1 2019

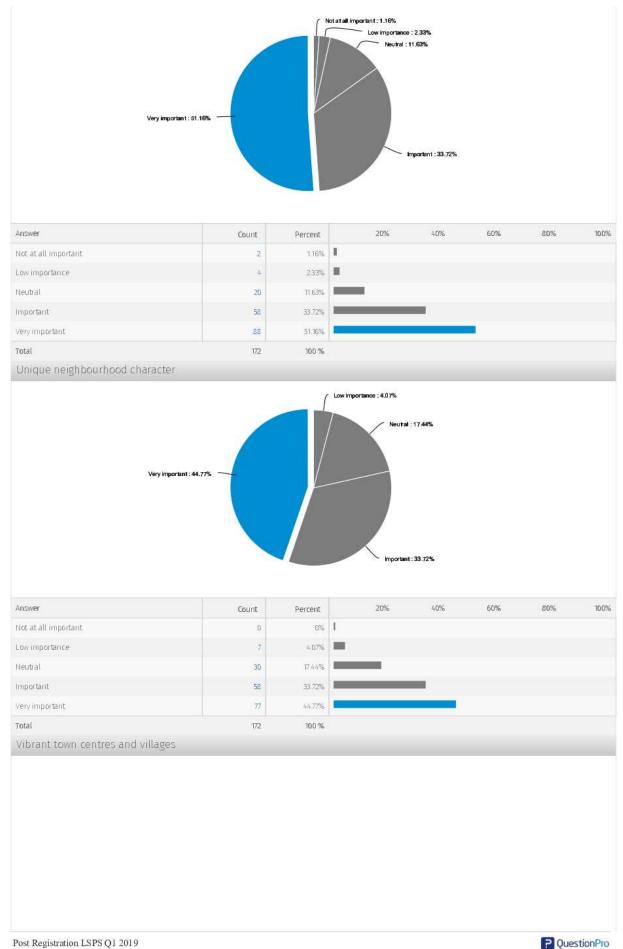


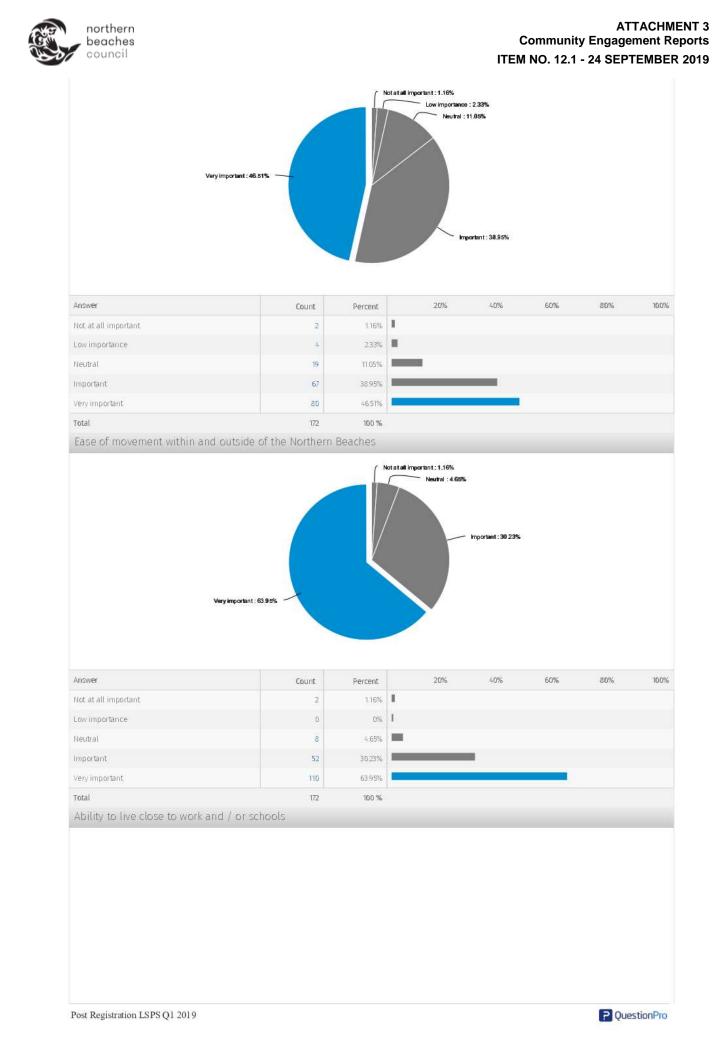




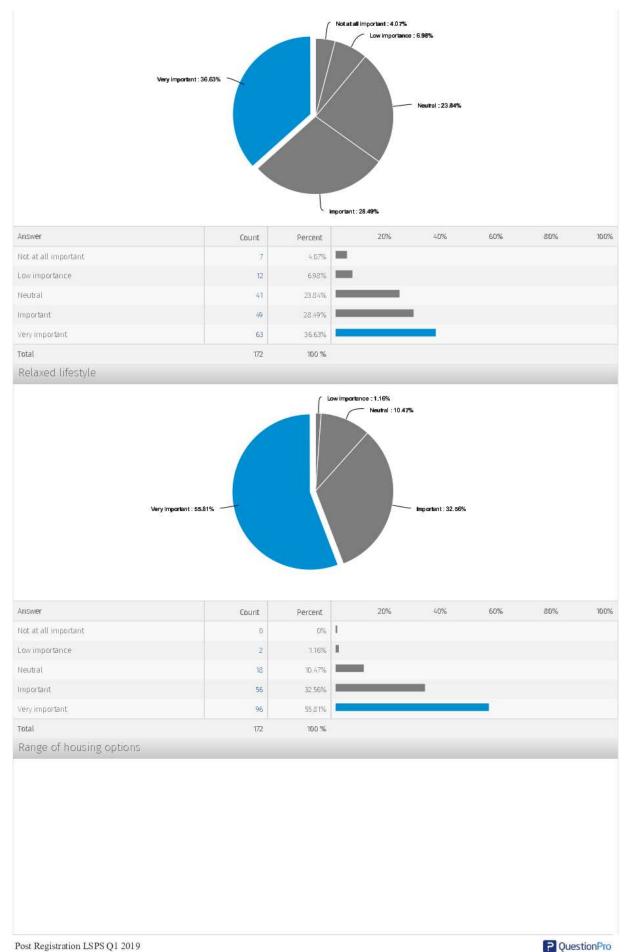




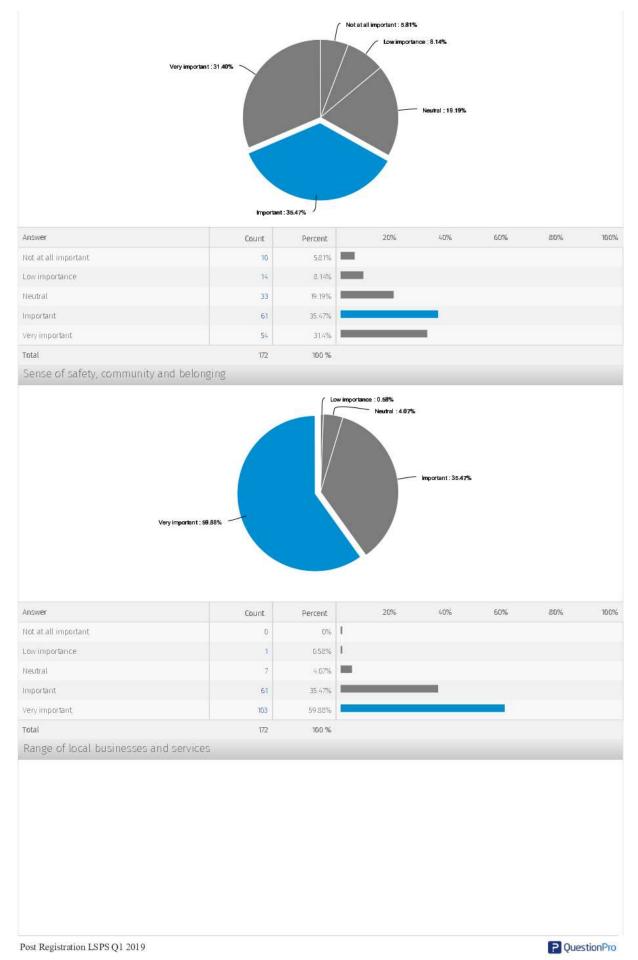




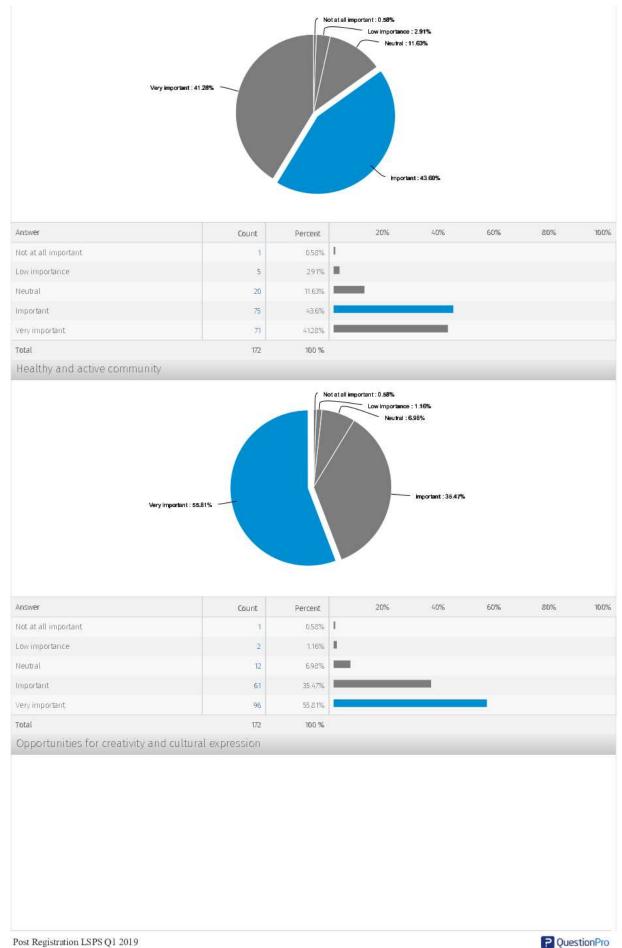




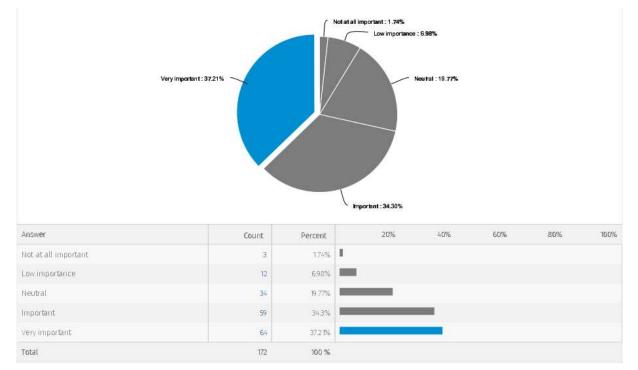




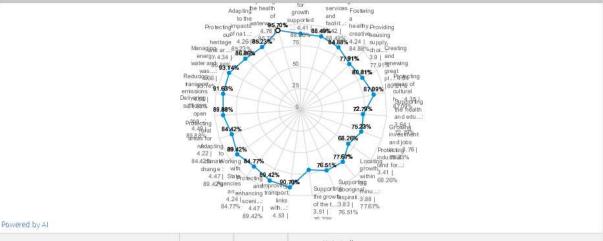








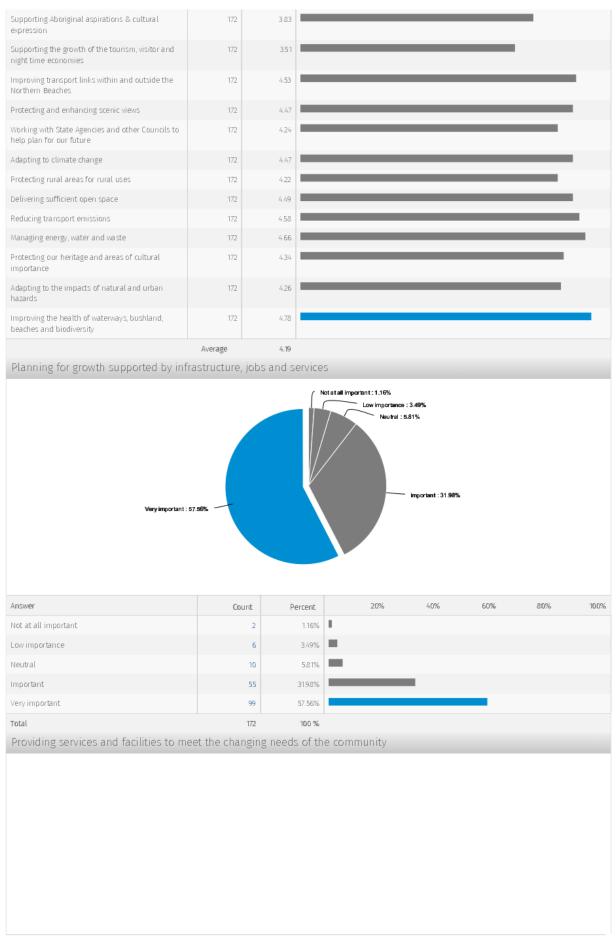
How important do you think the following challenges are for the Northern Beaches over the next 20 years?



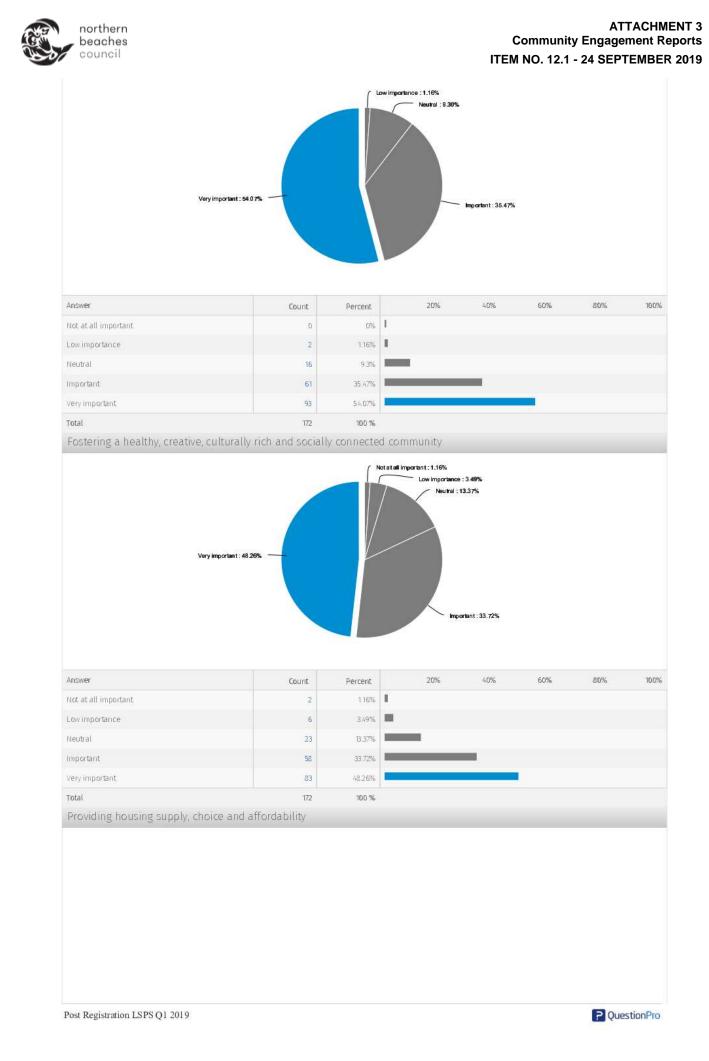
Question	Count	Score	Not at all important	Low importance	Neutral	Important	Very important
Planning for growth supported by infrastructure, jobs and services	172	4.41					
Providing services and facilities to meet the changing needs of the community	172	4.42					
Fostering a healthy, creative, culturally rich and socially connected community	172	424					
Providing housing supply, choice and affordability	172	3.9					
Creating and renewing great places and centres	172	4.04				1	
Protecting areas of cultural heritage	172	4.35					
Supporting the 'health and education precinct' of Frenchs Forest	172	3.64					
Growing investment and jobs in our main centres	172	3.76					
Protecting industrial land for industrial uses	172	3,41					
Locating growth within 30 minutes of main centres by public transport	172	3.88					

Post Registration LSPS Q1 2019

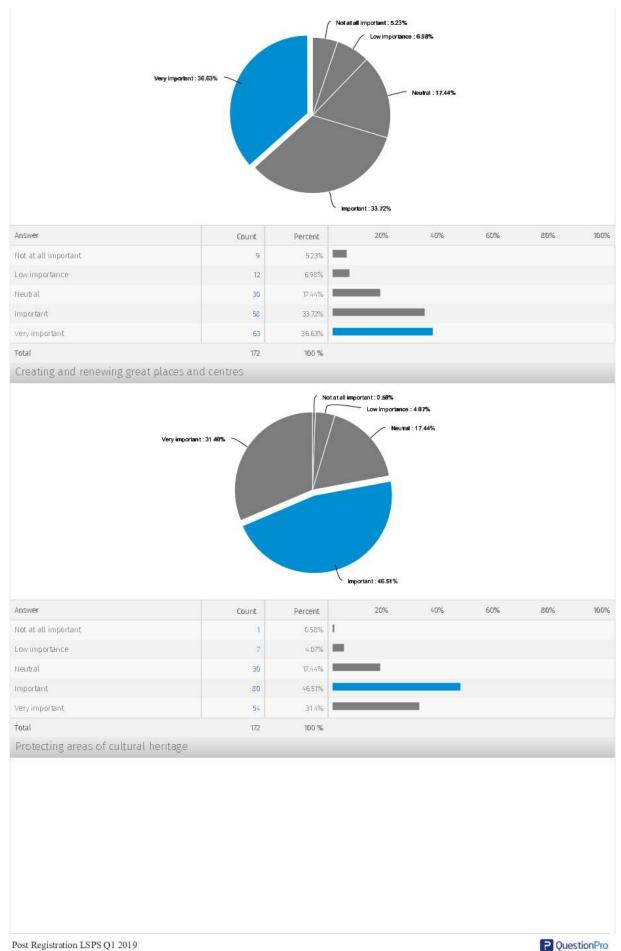




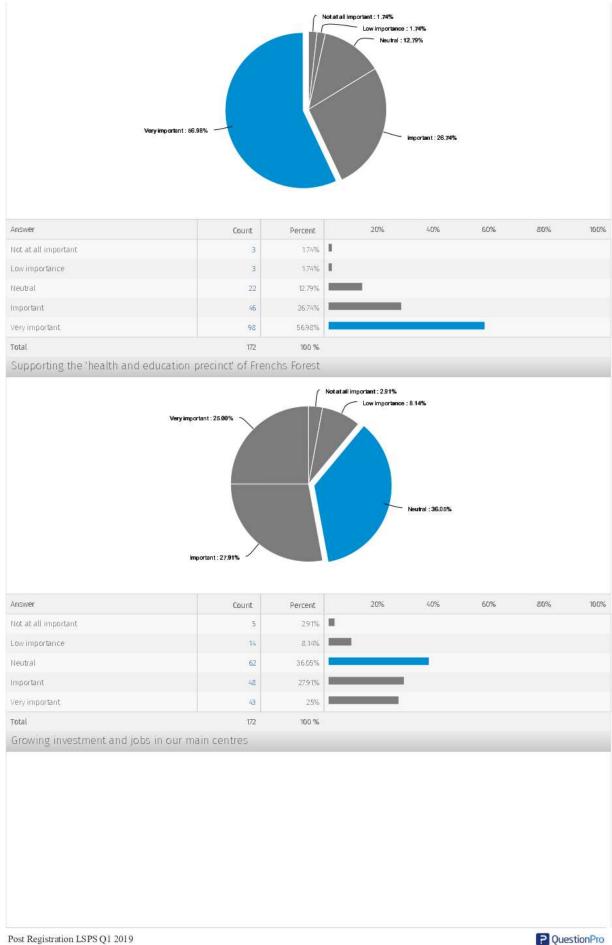
Post Registration LSPS Q1 2019



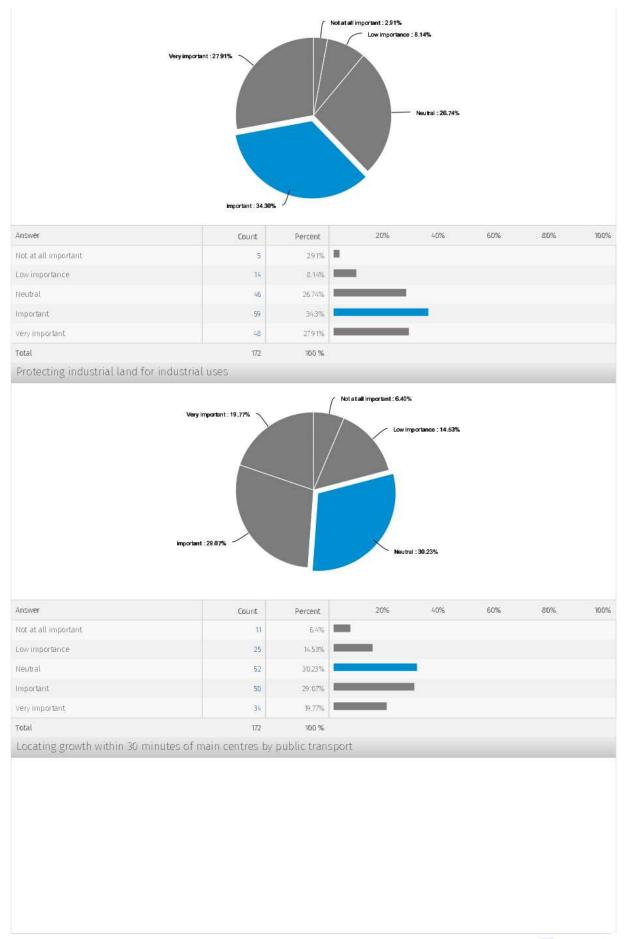






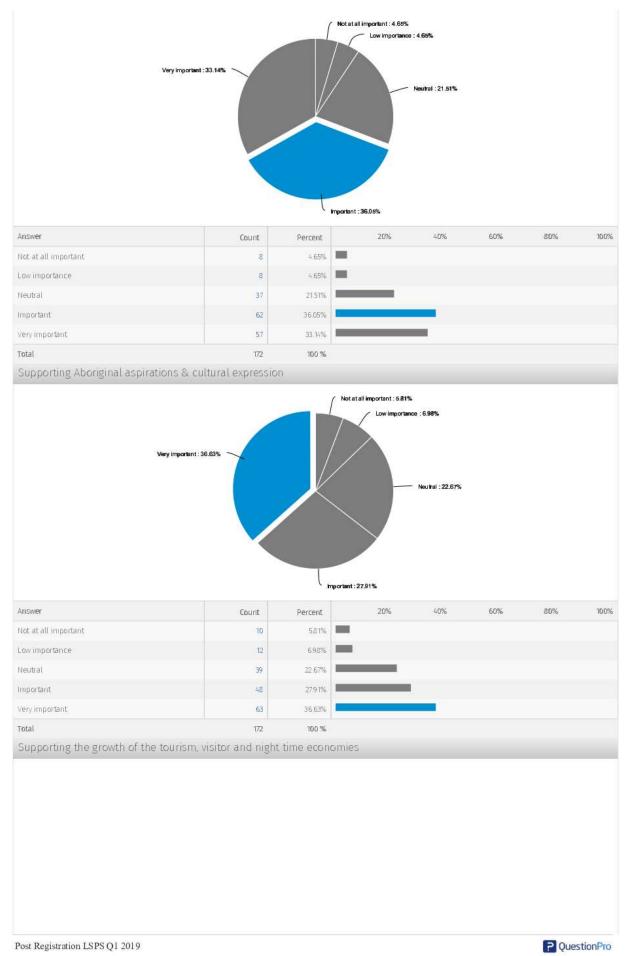




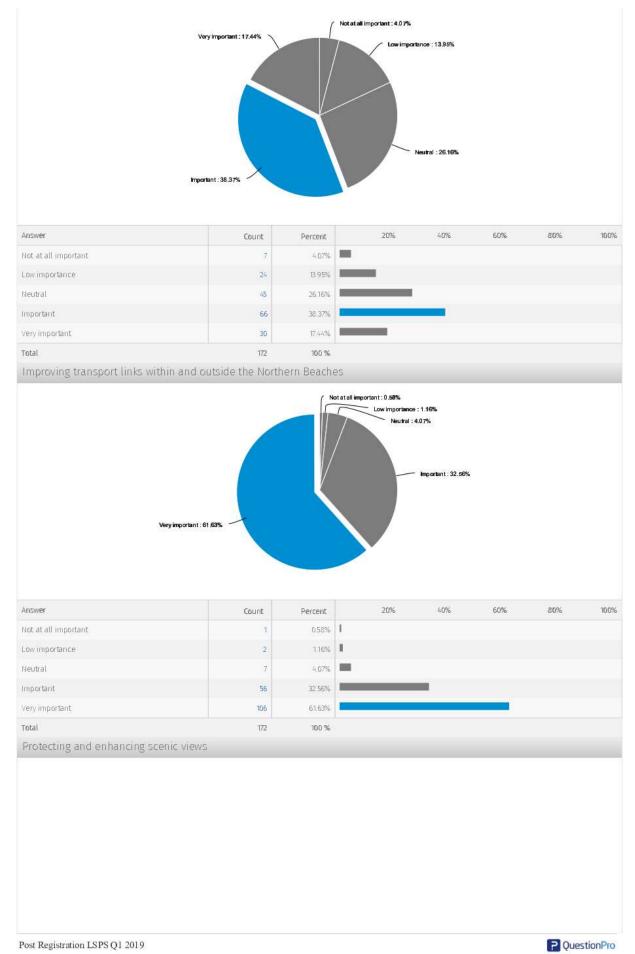


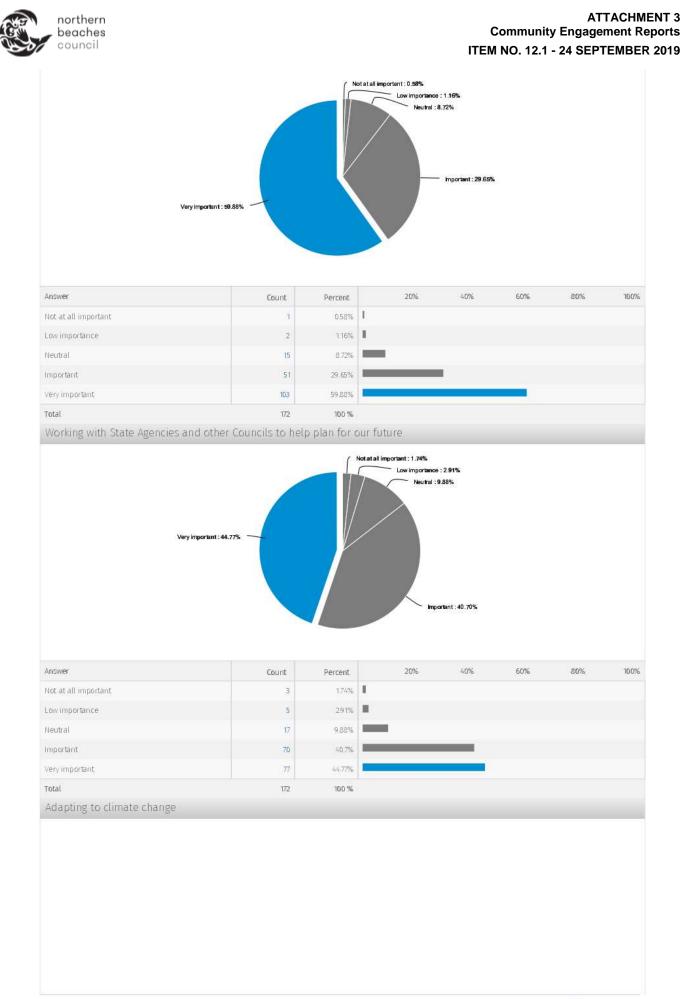
Post Registration LSPS Q1 2019





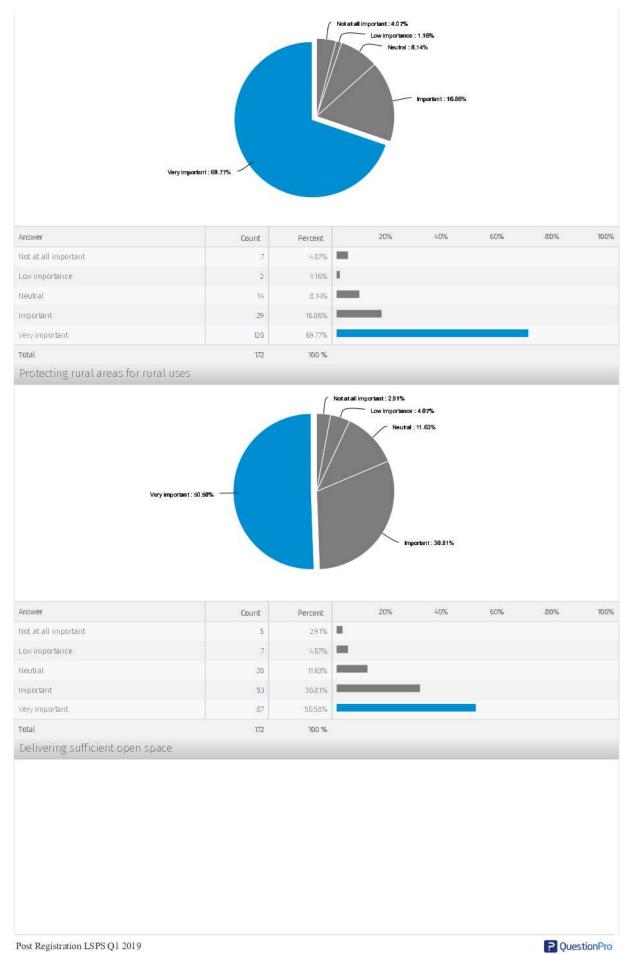




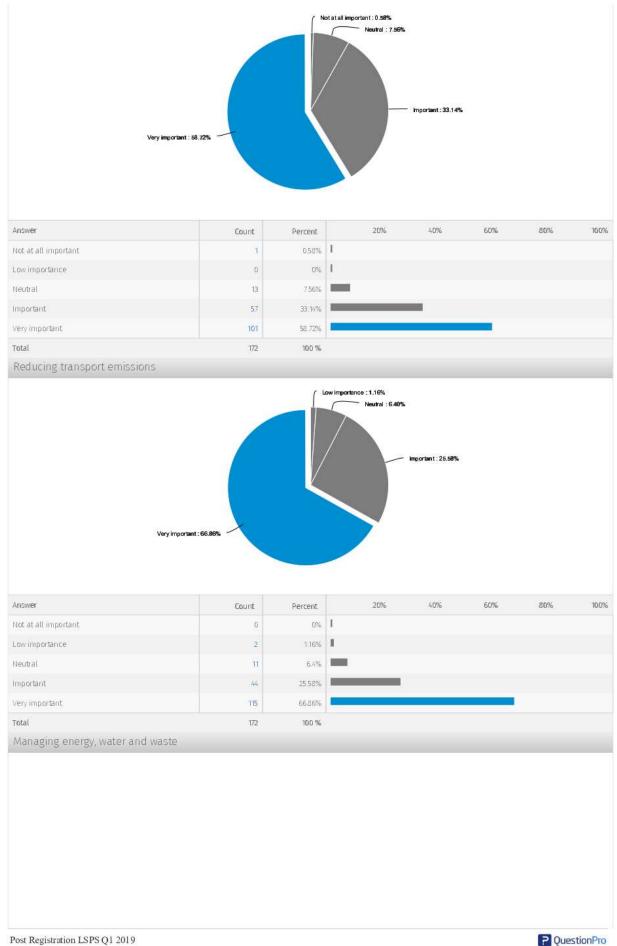


Post Registration LSPS Q1 2019

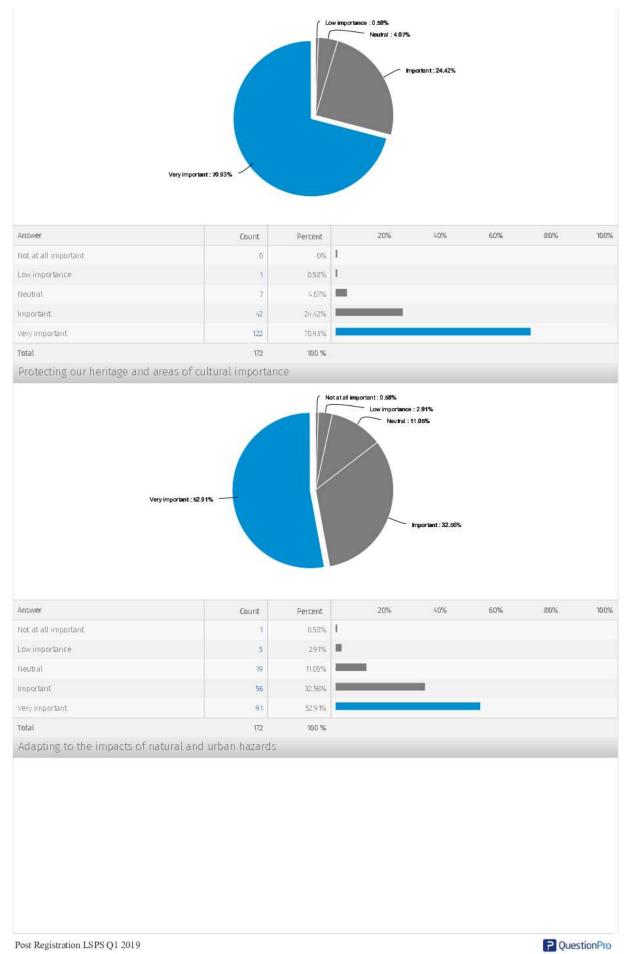


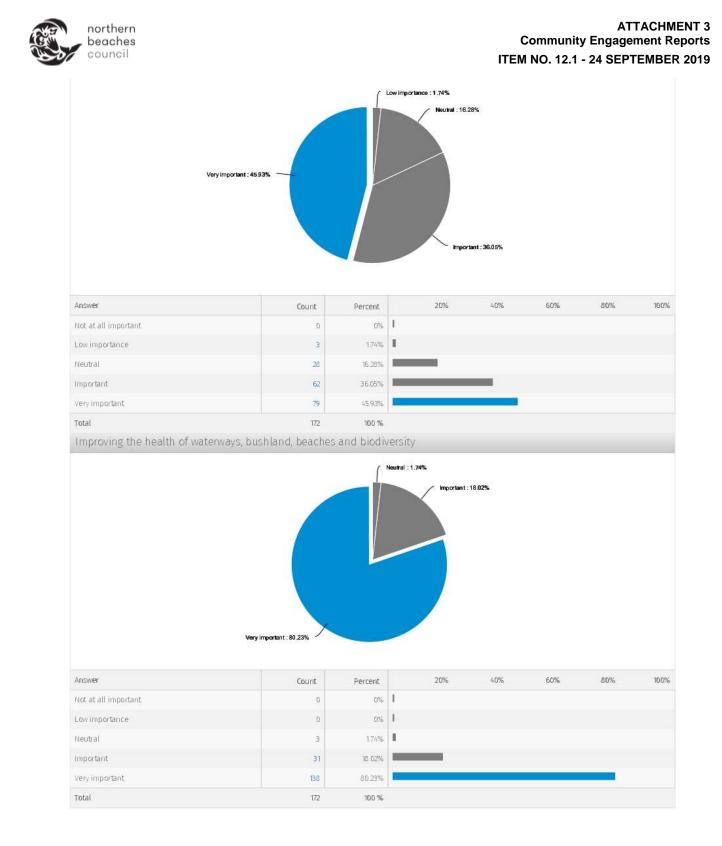
















urther comm	nents / sugges	tions Council should consider in the development of the Local Strategic Planning Statement
04/23/2019	1606510972	I believe we need to balance development of high density housing with the practicalities of the location and limited transport options. Other areas in he greater Sydney area are better suited to medium to higher density accommodation.
04/21/2019	1606499697	This form did not allow prioritisation of importance. You did not differentiate between public and private transport.
04/18/2019	1606489242	I thoroughly believe as a community we need to be working towards a completely circular economy as quickly as possible. I also believe that this is very achievable if we focus our efforts. One big step in the right direction as a council would be how we deal with our waste. We should have seperate organic waste bins (all food scraps, basically any organic matter) that can be sent to industrial compost and much better education and transparency on what items, in what condition, can be put into each of our bins. A lot of people don't know and don't care and this has to change.
04/12/2019	1606422268	The beauty of the northern beaches is it's relatively low population density. Please don't increase higher density housing development
04/01/2019	1606335871	I strongly feel that Townhouses/Duplexs should be allowed on decent size land blocks (anything over 900sqm). They can still fit it with surroundings looking just like one home from the outside. THis will help with housing affordability and offering a wider range of housing options
03/19/2019	1606236324	With over-congested roads, Council needs to do more on Last Mile Mobility and active transport, especially the provision of safe off-road bike paths Encouraging active transport will also help bolster economic activity in the area's shopping villages and town centres, as very few of them can provide enough parking to support the retailers, cafes and small businesses located nearby.
03/12/2019	1606168778	Get off the "bogs off Leash" Bandwagon. Dogs & cats are not "entitled" to anything. Council should stop pandering to these noisy individuals who represent a minority. If you want a pet, fine, choose carefully, considering the facilities that are available now & keep your animals under control. I have kept multiple dogs & cats in Pittwater over last 20 years. They trained & contained indoors at night & exercised on leash & under control.
03/06/2019	1606121046	Space for business, lobs come from places for business and light industry to develop. More retail and coffee shops do not provide job nor education infrastructure
03/06/2019	1606118496	Measures to control parking of motor vehicle in urban areas including boat trailers, caravans, signage trailers, trucks etc. Measures to control unnecessary and excessive noise from motor vehicles, motor bikes and power tools.
03/06/2019	1606113427	As all are important, the community strategic plan is a good overview of the community requirements. A mix of demographics is needed, dont want is to become retirees dominated and for families to be squeezed out or forced to accept visual living space. Aged care should be in the centres, not is paddocks in Terrey Hills. Rebuilding tree canopy is a sentinel sign of success. As northern beaches has highest rate of green reduction as shown by university led aerial analysis, trees get in the way of development, not just medium density but single dwellings are replaced by larger dwellings and also trees go for access to views. So a sign that this tide is turning will show if plans are working or not. Please follow up and partner with the Uni that did the SMH article where Pittwater had the highest tree canopy % loss.
03/05/2019	1606113023	Ensure zoning in community hub areas/town centres prevents their conversion into commuter apartment buildings and focuses on providing retail, service, business, fitness, play and community hubs, ie. don't zone as mixed use where you want to encourage local jobs/businesses to thrive.
03/03/2019	1606086133	Waste management could be different. Lenvision public compost bins and public areas where the community can grow their own food. Latso would like to have more access to culture in everyday spaces. More paintings by local artists on walls, more spaces where the community can have easier access to local musicians. Liwould like to see the council encouraging local businesses and the community to reduce the use of single use plastics. I would like people to feel encouraged to use our public transport and leave their cars at home or be encouraged to do carpooling.
02/25/2019	1606046531	1) Planting of more trees around frenchs forest. The areas looks like terrible. 2) Also, the under-grounding of electricity cables along Frenchs Forest road considering the area is being promoted as a "health" precinct. 3) A halt to all boarding houses in the Frenchs Forest area.
02/25/2019	1606039553	Sustainability and regenerative design should be thread across all sectors (social, environmental and economic) rather than as an after-thought to decisions and planning.
02/24/2019	1606035439	Improve community input into planning decisions. The new NBC appears to be more opaque in planning decisions than the old Pittwater or Manly Councils
02/24/2019	1606035227	Ensuring that development does not destroy or downgrade our suburbs
02/24/2019	1606035219	Active transport options missing in and around Frenchs Forest -busy roads not suitable for family cycling -bushwalks degrading, not maintained and closing in Garigal NPI Council cleanup collection is an appalling strategy - so much landfill! Council does not provide good information about waste management (PR staff not informed) and the communication strategy is totally insufficient!
02/24/2019	1606035193	Create a House/museum dedicated for surf and all the surf spots/pics from manly to palm beach. The plan was characterize and design all the waves with a coastal numerical model. I am from Portugal and the council of ericeira made a similar project, as it is a world surf reserve as Manly and Freshwater are. For more information please contact me
02/24/2019	1606035116	Development must not be dictated by commercial interests. Open space must be preserved for the local community. Northern Beaches ratepayers should not have our public land alienated for the benefit of non-ratepayers eggolf clubs for Mosman residents. Anti-corruption measures are essential. More should be done for our Aboriginal residents and Aboriginal peoples whose country is in the LGA.
02/23/2019	1606031937	not a very useful survey, of course everyone would agree with most of these high level 'statements' such as our 'Relaxed lifestyle' and wants access to community services and facilities e.g. pools, libraries, high quality bushland, beaches and waterways. However not sure how Council would delivering 'sufficient open space' when surrounded by national park and the ocean at the same time providing 'housing housing supply, choice and affordability' as well as supporting the growth of the tourism, visitor and night time economies.
02/22/2019	1606028137	Get rid of cars, boats, caravans & trailers parking on suburban Streets
02/22/2019	1606019263	1) Encourage a move toward sustainable plant based eating as it's not only cheaper, better for the climate but also scientifically proven to help against diabeties and a range of illnesses unlike meats & bacon which are scientifically proven carcinogens. 2) Reopen Mona vale Hospital Emergency Department. It's essential.
02/19/2019	1605990381	There is simply too much development in the area leading to overcrowding and congestion. The development needs to be curbed
02/19/2019	1605985968	Work for a better balance between State and local government objectives

Post Registration LSPS Q1 2019



02/19/2019	160598.5483	DO NOT agree with the assumption in this survey that Sydney/Northern Beaches MUST increase its population and plan for growth because of a dictate from the Greater Sydney Commission. This is a discussion that needs to be had with the Australian people - and not ASSUMED that it is going to happen at the current govt's suggested rate. The former Pittwater area is a unique and environmentally sensitive area that needs protection. It cannot sustain further growth. It is a peninsula with one road in and out and significant geographic restraints. It is just not feasible to develop it or increase its population, as that would result in environmental degradation and destroy the very thing that makes it a special place to live/visit. The residents live in this area precisely because it is 38km from the city. We do not want development or population growth. We do not want the "harmonising" of the LEPs and DCPs, where all the NE suburbs are lumped together. We fear we will be "harmonised" right into the same ugliness as Dee Why, Curl Curl and the other treeless/high-rise wastelands that have been created over the past few years in the former Warringah Council area. We must have definitive locality statements written into the LEPs and DCPs to protect the individuality of our suburbs and maintain their natural environments with very minimal development/population growth, for the sake of the flora, fauna - current and future generations.
02/18/2019	160598 4378	over development will make all priorities more difficult to achieve you can't keep adding people and putting pressure on environment and still maintain our life style
02/18/2019	160598 4338	No.
02/18/2019	160598 409 1	Put controls in place to prevent the over development or rezoning of established residential and bushland areas.
02/17/2019	1605977160	The Importance Of Visibility Of Planning Applications. More open Forums for Residents . Accountability for Budget Decisions.
02/17/2019	1605977155	Very important you listen to and work together with unbiased experts in various related fields who do not work for the Government, State agencies or council also.
62/17/2619	1605975045	We need continued public transport and multi-use transport options, protection of waterways and gentrification of area such as Brookvale and Condamine street in Manly Vale.
02/16/2019	1605973462	No more traffic, do not promote the area for tourism and increased patronage.
02/14/2019	1605945083	Vegetation and composting system should be introduce like Penrith Council. All infrastructure is already there
02/13/2019	1605943544	I am very worried about the environment now, changes need to start taking effect immediately so that in 20 years, we can see a change.
62/12/2619	1605925639	We have a huge waste issue, I think the northern beaches could do a lot more and set an example for the other councils in Sydney. We have such a beautiful backyard being in the beaches. We need to be the leading front in the sustainability and environmental movement
02/11/2019	1605924034	Much of the above was covered in the Community Strategic Plan. Council need to drill down to suburb level to achieve Community led LSLP. This cannot be another generic non specific exercise.
02/11/2019	1665919130	Covered Creeks need to be opened up to encourage wildlife back to our area
02/10/2019	1605918919	Please listen to what rate payers are saying.
02/08/2019	1605912957	I look forward to being actively and gainfully involved. Thanks for the opportunity. Stephen
02/07/2019	1605906747	Hard survey to respond to as essentially all topics are important' at some level. For example I am personally not a supporter of 'growth' locally, nationally or internationally. So I score planning for growth low, not because i think the planning is not important (it is) but because I I think the premise is misguided. I think we should be planning for sustainability, not growth just because we can 'grow' and still keep the wheels turning doesn't mean therefore that growth is good. I think living within (and returning to) our means is a better ambition. Not just trying to get more out of less. For example, the better solution for waste management is to waste less, not get better at dealing with the waste. The better solution for congestion is to have less people, and cars, not bigger and better roads. I digress sorry (). Keep up the good work guys.
02/07/2019	1605906252	Done protection is needed in freshwater. Also weed management. I'm also concerned about your plans with the general waste to strip out organic matter. I think this will lead to micro plastic polutuition. Better to put food waste on with the green waste.
02/06/2019	1605899540	Improve communication between different council entities!
02/06/2019	1605899418	Keeping building heights to a reasonable level to preserve the character of our area. Meriton type towers do not belong on the Northern Beaches.
02/06/2019	1605893057	Would like to see more cafes on beaches
02/04/2019	1605885176	Put footpaths in many of our streets that have none and force people to walk on the road. Lower the street speed to 40 km/h. Create a residents parking system - too may houses now have 4plus cars to each house and the streets are becoming impassable.
02/04/2019	1605878718	Stop the northern beaches link. Plan for high quality public transport integrated with urban renewal to create great places of Manly Vale/ north Balgowlah industrial area, Warringah mall and adjacent govland including bus depot, frenches Forrest, Brookvale etc Plan for reduction in car use. Maximise water transport.
02/02/2019	1605873417	Don't be bullied by the state government pushing a standard planning template. Reintroduce locality statements which recognise the unique attributes of our many different localities. Undertake genuine engagement with community groups to ensure these attributes are included in any future planning documents.
02/01/2019	16058 69136	Seriously listening to and acting on credible suggestions from the community. We have awareness of what is happening outside our NBC area and experience of many backgrounds and expertise. NBC listening and genuine reaction is vital
01/31/2019	1605858608	Protection of native animals and their habitats, reducing over development of natural bushland, reducing road kill of native animals, protecting marine habitat and guarding against coals seam gas exploration and/or seismic testing. Supporting wildlife refuges and animal rescue organisations, stopping land clearing shutting down puppy farms and encouraging rescue animals as companion animals.
01/31/2019	1605858607	Use planning to foster Village/town/ centres; try to reverse ribbon development of Pittwater Rd
01/31/2019	1605252606	I would like sustainability guidelines for all future buildings (commercial and private housing) to have guidelines to reduce waste, recycle certain percentage of materials, low emissions, low community impact, reduce water consumption, and have renewable energy included. The aim being to significantly decrease community and environmental impact to any future planning (buildings, transport, recreation and infrastructure). The beaches will not bounce back from the current rate of consumption, waste, pollution and disruption, if this is not addressed by council.
01/30/2019	1605853558	All of the above statements are very important to work towards. Underlying most of them is the issue of sustainability. How do we achieve these goals
01/29/2019	1605838761	Have

Post Registration LSPS Q1 2019



01/29/2019	1605834842	Securing and protecting remaining bushland areas along the Northern Beaches from development.
01/28/2019	1605834261	There just aren't enough sportsfields on the Northern Beaches. Also, the new town centre in Frenchs Forest is an absolute disgrace of putting money before the interests of the existing residents that will have to deal with the construction (medium term) and traffic issues (ongoing). The Forest should keep its Forest - not become a mini-Chatswood/Dee Why.
01/26/2019	1605822545	The need to protect bushland, reserves and parks from encroaching development. The need to protect what fauna and flora we have left.
01/26/2019	1605819810	The projected age of people living in the area is important as this will dictate to an extend where money will need to be spent, whilst ensuring new families are able to move in - balancing the age of the demographic. Engaging a broad cross section of the population is also key to ensure the outcomes are not biased.
01/25/2019	16058 19375	Population growth is inevitable but council must work to reduce the impact of it on the natural environment we are so lucky to live in here.
01/25/2019	16058 19260	Appropriate development is key. A balance of development along with infrastructure is really important. Warriewood valley has gone too far towards the development and not enough nfrastructure. Overcrowding is one of the p
01/25/2019	1605816104	Please note, some responses given in this survey may be open to interpretation as questions didn't have much context. It's important that responses to this survey are properly qualified. For example, support for 'improving transport links in and out of the beaches' means I support public transport not private toll ways. However there is no opportunity for clear distinction in my answer.
01/25/2019	16058 15 12 1	The Northern Beaches Council should have an aim to run all operations on 100% renewable 'green' power.
01/25/2019	16058 14939	Consider ways everyone can learn, support and interact with the UN SDGs that benefit all the above and much more. One program wanting to connect with councils and residents has a Youth focus but needs everyones interaction with
01/25/2019	16058 1405 6	Improve the quality of waste water discharges into the marine environment. Melbourne's 'Eastern Treatment plant' treats severage to ADVANCE TERTIARY STANDARD.
01/21/2019	1605790617	Include 'managing increasing bushfire risk from climate change by enhancing and adding roads for evacuation in bushland areas, allowing people to clear bushfire prone land to safeguard human lives, and providing designated areas of safe refuge in an emergency, including for horses etc.'
01/16/2019	1605759102	Planning for the night time economy, planning for tourism, building units that cater for families







8.4 Appendix Four: Workshop and focus group results report

Local Strategic Planning Statements Engagement Summary Report

Northern Beaches Council 10 April 2019





Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Contents

1.	Introductionp3
2.	SRG Workshop Overviewp4

- 4. Focus Group Overview......p20
- 5. Focus Group Detailed Results......p24
- 6. Appendices.....p38

Northem Beaches Council: Local Strategic Planning Statement Engagement



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



01: Introduction

Across NSW, local government is working on a review of their land use and planning. A core part of this work is the development of a Local Strategic Planning Statement (LSPS) for each local government area (LGA).

Northern Beaches Council's ('Council') LSPS, developed in consultation with community, will include:

- A 20 year vision for land use and planning ij.
- . Priorities to deliver on this vision
- Specific actions under each of the priorities
- Means of measuring progress towards the vision .

Engagement on the LSPS naturally flows on from the conversation Council held with the community in 2016 during the development of the Community Strategic Plan (CSP), which provided an overarching 10 year vision and priorities for the future of the area.

In December 2018, Council partnerec with engagement agency KJA to commence the conversation on the LSPS by hosting a workshop on 18 February 2019 with the Strategic Reference Groups that formed out of the CSP process

The objective of this workshop was:

- To identify future challenges and desired outcomes for the Northern Beaches
- 2 Glean insights from discussion on prominent 'wickec' problems in the LGA

Following that workshop, Council prepared draft priorities for the LSPS and arranged seven focus groups from 19 to 28 March 2019 - across the LGA - to test these priorities with members of the community. The groups were broken down as follows:

- Pittwater
- Frenchs Forest .
- Narrabeen .
- Manly .
- Curl Curl .
- Culturally and Linguistically Diverse (CALD)
- Youth

Known members of the local Aboriginal community were also invited to attend the ward focus groups.

- The objective of each focus group was twofold:
 - To understand the partic pants' 20 year vision for the Northern Beaches
 - 2. To identify possible improvements to the draft LSPS priorities by asking the group to test them against their vision

The SRG workshop and focus groups generated valuable insights for the LSPS process, helping paint a picture of a desired future Northern Beaches that Council will use as a guide. Participants also engaged in difficult trade-off conversations, revealing to Council what is most important to the community and should therefore be factored in during future land use and planning work.

This report is split into four sections.

- SRG workshop overview .
- SRG workshop detailed results
- Focus group overview
- Focus group detailed results .

Council will use the feedback from the SRG workshop and focus groups to inform the redrafting of the LSPS priorities and actions before the draft LSPS is made available in full online for broader community comment. During this period, the community will have the opportunity face-to-face and online opportunities for feedback, comment and discussion. More information is available at https://yoursay.northernbeaches.nsw.gov.au/local-environmental-plan

Northern Beaches Council: Local Strategic Planning Statement Engagement



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement - stages 3 of 4)



02: SRG Workshop Overview

On Monday 18 February 2019, from 6-9pm, representatives from the Northern Beaches' Strategic Reference Groups gathered at the Tramshed in Narrabeen to generate information to inform the development of Council's Local Strategic Planning Statement (LSPS) and Local Housing Strategy (LHS).

The event – facilitated by staff from Council's Planning and Engagement teams and engagement agency KJA – is the first step in Council's review of its LSPS, LHS, Development Control Plan (DCP) and Local Environmental Plan (LEP). Participants were welcomed by Northern Beaches Mayor, Cr Michael Regan, provided a program overview by Executive Manager Strategic and Place Planning, Andrew Pigott, and briefed on anticipated changes to the area by Nemanja Nikolic from SGS Economics & Planning. Councillors also attended to hear first-hand what participants had to say.

The workshop was held as the first major engagement activity for Council's LSPS with the aim to identify future challenges and desired outcomes for the Northern Beaches, as well as to glean insights from discussion on prominent 'wicked' problems in the local government area (LGA) Given the SRG members' remit to help shape future directions and support the Community Strategic Plan's goals, it was appropriate that they provide input into the drafting of the LSPS. Participants were presented with local change factors and demographic predictions and asked to contribute to three distinct activities:

Challenges from Change	Northern Beaches Time Machine	Tackling Wicked Problems		
 Table facilitators rotated between small, mixed groups of participants, asking them what challenges they expect the Northern Beaches will face due to the following areas of change: The 30 Minute City Climate Change New Housing Demands Jobs for the Future Community Services and Facilities Changing and Ageing 	In small groups, participants were asked to describe their desired outcomes for a future Northern Beaches, in response to the following key challenge areas that emerged from the first activity: Sustainability Connect on Environment Transport Diversity Upskilling	 A different 'wicked' problem was presented to each small group, with every participants assigned an avatar to represent in a discussion on possible solutions. The wicked problems included. Less young adults in the Northern Beaches The Northern Beaches has an ageing population Providing suitable and affordable housing options Protecting natural environment from urban development Retaining and managing industrial land 		

The following sections of this report provide a summary of the outputs from each session along with an indication of next steps. Presentation slides are also provided in the Appendices.

Northern Beaches Council: Local Strategic Planning Statement Engagement



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



02: SRG Workshop Detailed Results

Challenges from Change

The challenges and suggestions offered by each group for each change factor have been merged and summarised under key themes below.

Jobs for the future

Key theme	Challenges and suggestions
Image and perception	Overcoming the stigma associated with working on the Northern Beaches Improve professionalism and quality of office space Attract major corporations to establish satellite offices in the are Promote local environment and lifestyle
Affordable housing	Provde affordable housing for key workers
Land use challenges	 Lack of large lots/floorplates required to attract larger corporations (e.g. Google) Inconsistencies across Northern Beaches, with some areas lacking space while others lack demand Protect and expand industrial areas and quality business centres/office spaces Assign more space as flexible, mixed-use zoning to create open space Encourage development to improve ageing office blocks (e.g. in Dee Why)
Strategically supporting industries and business clusters	 Ended age development to my digital economy (aka Silicon Valley) that is currently at 'seed stage' around Manly Foster sectors where local skills match with future employment trends Secure financial support from Government for Business Hubs
Supporting business	Affordability of rent for local businesses Encourage landlords to have commercial spaces occupied Offer incentives for businesses that want to start up on Northern Beaches Ensure the Chamber of Commerce is very active
Education and skills	 Businesses struggling to grow due to lack of staff Provide higher paying jobs with career progression, as many local small businesses cannot offer this Upskill local population so that these people can help expand local industries (e.g. through Universities, Hospital) Encourage innovation and allow professionals to find good local challenges (e.g. by providing educational and research hubs in public and private sectors)

Social Services & Facilities

Key theme	Challenges and suggestions
Availability and affordability of land for services	 Limited or expensive land for providing services which, in turn, affects affordability of services and facilities Zoning issues, including developer preference for more-protitable residential development over community services in mixed-use zoning
Accessibility of services	 Intervenirg in trends (e.g. increased homelessness and domestic violence) Improve access to facilities and services (e.g. through improved public transport connections, community transport (aka 'Hop Skip Jump') and/or by establishing more smaller community hubs) Provide well-located and efficient community centres, aged-care and youth services Design developments that are flexible and accessible, meeting specific and multi-generational needs (e.g. 'Need Playgrounds' for kids and their carers)
Flexible use of assets	 Take a proactive, positive and flexible approach to using Council assets (e.g. innovative reuse of North Head, SHFR) Include community in conversations about developments, including those that comply

Northern Beaches Council: Local Strategic Planning Statement Engagement

5



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



	 Share use of schools infrastructure (e.g. to address shortage in playing fields)
Funding and responsibilities	 Retail operators in local centres – trying to be competitive – are unlikely to provide reasonable rates for community services Support smaller charities and services as larger NGOs will not always want the smaller structures and contracts the community may require Avoid 'siloing' of services (i.e. a different organisation for every service) Improve services (e.g. by exploring synergies with Services NSW)

Changing and Ageing Community

Key theme	Challenges and suggestions				
Seniors accommodation	 Connecting seniors accommodation to town 'centres' and preventing social isolation Meeting needs of seniors who do not want to move out of the community they have known for a long time Allowing for 'ageing in place' Holp address domontia by providing group housing that allows carors to live with the ageing person Set sufficient land aside for aged care facilities (e.g. Marily Library location) 				
Accessibility	Catering for disabilities Provide public transport that caters for the ageing population (e.g. Keoride, public and mini buses) Provide access to Northern Beaches Hospital				
Housing diversity	 Employing good design in good locat ons (e.g. the Stockland model with easy access, a gym, shops and parking all on one site) Addressing the delay in downsizing due to young people living with their parents Making downsizing a more attractive option Providing support services to assist people who choose to live in 'granny fats' Encouraging cownsizing through quality rather than quantity of housing Provide a 'housing stage' between a large house and a nursing home (e.g. townhouses) 				
Retaining young people	 Multi-generational housing means young people are not seen as a 'cash cow' for housing providers Yourg adults are moving out of the area to work in the City and Inner West The lack of night time activity for young people (e.g. music venues and restaurants) 				
Quality of life	 Quality of life being affected by decreasec tree canopy, as people are discouraged to walk outside Provide bigger, centralised green spaces (including but not limited to sports fields) to cater for increased density 				

New Housing Demands

Key theme	Challenges and suggestions
Affordable housing	 Providing a housing mix to prevent 'social problems' (e.g. Balgowlah Stocklands as good example of mix) Overcoming negative perceptions of affordable housing Use key worker accommodation' terminology instead of 'affordable housing' Provide access to social housing in every suburb (e.g. by mandating)
Housing diversity	 Providing well-designed secondary dwellings / granny flats Providing three-bedroom flats Too many large houses currently in the Northern Beaches, need more small houses to meet demand (e.g. small lots or townhouses) Possibly identify specific areas for medium density dwellings
Environmental impacts of urban development	Achieving good environmental design Balancing granny flat provision with removal of trees Providing open space as additional dwellings are built

Northern Beaches Council: Local Strategic Planning Statement Engagement

Б



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Traffic and parking	Addressing traffic generated by increased density
Managing growth	 Supporting growth in centres with services, facilities and infrastructure (e.g. childcare) that meet demand Reducing the demand for housing Centralising growth in centres Reluctance to release land Concerns with 'stabilising' population growth
Cohesive communities with character	 Offering connectivity and building communities Retaining character of the area during new development Managing changes to character due to increased density

The 30 Minute City

Key theme	Challenges and suggestions
Strengthening public transport	 Overcoming reliance or cars and resulting congest on by providing improved, further-reaching, quicker and more affordable public transport Tackling location-specific challerges (e.g. Pittwater Road, Narrabeen bridge) Continually improving cycleways and walkways, including designing places to promote walkability Improve public transport connections (e.g. East-west B-line between Dee Why/Chatswood, Mona Vale/Macquarie University; Roseville Train Station; more and longer bus lanes, more restricted bus stops in peak hour, more fast ferries from Manily to Sydney CBD) Address school traffic (e.g. through bus improvements, staggered school times, encouraging parents to put school children on oublic transport, encouraging walking.
Health and education infrastructure	 Provide swift access to emergency health care, including in the nother part of the LGA Offer access to higher education in the Northern Beaches with institutions (i.e. universities, TAFE) that respond to the community's skills and needs, promote lifelong learning, help reduce student travel time and provide more qualified local workers Concentrate services and facilities in centres, including by establishing integrated olusters of health, leisure, activity and learning Provide future-proofed infrastructure that promotes human movement, allows for population growth and acknowledges the impending charges to the motor vehicle
Liveability of centres	 Underperforming centres causing residents to travel further for what they need Current lack of evening entertainment/ night time economy/ vibrant social life Better promote live music and other 'vibrant' industries Leverage residential land that is underutilised during the day Better utilise laneways and exploring other adaptive-reuse to provide mixed-use centres
Jobs and Businesses	 Increase the number of jobs in the Northern Beaches to reduce the need for residents to leave Provide more commercial/office space and co-working hubs so people can live closer to work Build up already-established industries and – like other locations around the world – attract investment by promoting Northern Beaches as a unique place for business Cluster complimentary industries to reduce their need to source expertise, products or services from outside the LGA Protect and/or expand employment centres Improve internet speed and mobile reception and promote flexible work arrangements to make working from home for viable Offer flexible work hours to reduce traffic congestion Provide end-of-trip facilities for those undergoing long commutes
Housing diversity	Delivering a diverse range of housing types
Sustainability	Addressing climate change Sustainably designing infrastructure and housing Responding to growing population

Northern Beaches Council: Local Strategic Planning Statement Engagement

7



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Climate Change

Key theme	Challenges and suggestions
Improving efficiency	 Managing greater demand for resources due to increasing population (e.g. waste, transportation)
10010000000000	 Making it easy and affordable for people to live sustainably
	 Urgently address emissions (e.g. through trees and cooling features, stabilising the population, improving efficiencies)
	 Improve and promote public transport (e.g. light rail, hop on/off buses), over road infrastructure (e.g. tunnel) and electric vehicles to reduce pollution from cars
	 Improve efficiencies in waste and water efficiency (e.g. electric garbage collection vehicles, recycling waste and grey water, improving rainfall capture)
	 Lead energy efficiency (e.g. solar power for large scale developments, promoting renewable energy policies, reducing coal fire power consumption, building Council- ovined energy infrastructure)
	 Use new technologies to become increasingly self-sufficient as an LGA (e.g. creating a local food supply by utilising rooftops or using food waste for energy)
Natural hazards	 Sea level rises and the potential for Council to be subject to legal action by property owners
	 Increased storm events resulting in flocing and storm surges
	An increase in the number of houses in Manly identified as sitting on flood prone land
	 Increased bushfire risk due to higher temperatures
	Safeguard infrastructure against the impacts of natural hazards and extreme weather
	across the LGA (including electrical infrastructure) (e.g. need to redirect investment away from areas likely to be impacted, place power poles underground;
Protecting	Loss of biodiversity from fragmentation of natural habitat (i.e. deforestation, loss of
our natural	corridors, tree canopy, green space)
environment	 Large excavations disturbing natural watercourses
	 Managing perceived push from State Government for increased development
	 Maintain trees to continue the Northern Beaches' role as the 'lungs' of Sydney (e.g. by creating new national parks in Manly Dam and Oxford Fails Valley)
	 Preserve and effectively replace mature trees where necessary (e.g. by planting new trees early so tree canopy is not affected)
	 Overcome challenge of land as finite resource (e.g. by establishing house boats on large waterways)
Managing the built	 Increase in hard surfaces (i.e. tessellated (pervious) pavements) impacting temperatures
environment	 Increase in underground car parks may increase threat of inundation
	 Use of materials that are flammable and bushfire prone may present challenges
	 Embracing non-traditional approaches to respond to challenges
	Provide infrastructure for electric vehicles
	Create tighter, walkable centres
Managing	 Challenge of managing our population's consumption patterns and awareness
people's	 Educate residents on improved behaviour and positioning the Council as a "lighthouse"
behaviour	for sustainability' to promote action at the individual level
	 Educate tourists on improved behaviour (especially waste-related) (e.g. by presenting information on ferries or in environment centres)
	 Support politicians who listen to the advice of experts (such as the Chief Scientist) on climate change

Northern Beaches Council: Local Strategic Planning Statement Engagement

northern beaches council

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4) 8



Northern Beaches Time Machine

.

Key Challenges

Following the first activity, the facilitators of each Change Station reported to the group the key challenges that emerged from their discussions. Using these as a basis, the KJA facilitator proposed the following six key challenge areas as a framework for the 'Northern Beaches Time Machine' session.

.

.

.

Sustainability	Connection	Environment	Transport	Diversity	Upskilling
				O	
Managing resources efficiently and offering affordability	Providing community centres and amenities and supporting social cohesion	Dealing with natural challenges while managing the impact of our urban environments	Improving public transport and managing traffic	Promoting diversity of people, skills and spaces	Embracing new technologies, improving education and fuelling innovation

Desired Outcomes

Small groups described their desired outcomes under each of these key challenge areas. Their suggestions have been merged and summarised below.

Sustainability Climate change effectively managed through low carbon emissions Strong green spaces (e.g. roof gardens, green walls, market gardens, greater ٠ tree canopy, community gardens) Collaboration with developers (e.g. through the Development Control Plan) to achieve better designed, future-proofed, responsible buildings using sustainable materials (including with smaller building footprints) Efficient and sustainable energy use moving towards a self-sufficient LGA (e.g. . embracing solar energy across the Northern Beaches) Limitations put on growth . Council as a leader in education on sustainability More efficient communication technology to allow people to work from home More business and jobs to sustain the population

Northern Beaches Council: Local Strategic Planning Statement Engagement

9





Connection	 Vibrant town centres providing a full range of services and social Ife, including at night Well-balanced design of urban centres, including entertainment/lesure hubs in town centres designed to happily co-exist with apartments Opportunities to live and work in the area, including for key workers The ability to live without a car A sense of community, with corner shops and other supportive spaces encouraging socialisation and spending on local products and services
Environment	 Urtouched natural areas and protected and enhanced ecosystems with biodiversity and wildlife corr dors throughout the LGA (e.g. for koalas) Green, innovative environments (e.g. roof gardens, green walls, market gardens, greater tree canopy, community gardens) Variety of green spaces and trees in walking distance, including open spaces for leisure and sport Attracting outdoor environments with clean air and improved water quality (e.g. lagoons, no sewer overflows) and water-sensitive urban design Respect for country and our natural heritage A low carbon footprint with food and energy produced locally Quality environmental design (e.g. sandstone boulder sea walls) 'Good' density with smaller building footprints and limits to growth
Transport	 A 30 minute city with targeted, reliable and affordable connections to main centres and universities Strong public transport (e.g. dedicated public transport roadways, better eastwork connections, treetop gondolas for Mona Vale Rd) making it possible to live without a car Progressive solutions (e.g. mandated varied working hours, only electric vehicles allowed to travel within the Northern Beaches, green space above tunnels, more expensive parking to discourage car use) More people choosing active transport, with pedestrianised hubs full of people walking or cycling to work The shared economy has 'kicked into gear' in the area, including the use of autonomous vehicles

Northern Beaches Council: Local Strategic Planning Statement Engagement

northern beaches council

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4) 10



Diversity	Universal design for the inclusion of all people, promoting diversity and
	integration of age, race, religion, culture and ability
	Multi-generational families remaining in the area to prevent the Northern
	Beaches from becoming 'one big retirement home'
	Diverse and multi-generational housing options with inclusive design of
	buildings and the spaces between them (e.g. self-supportive, communal and
	affordable dwellings aka those in the Netherlands)
	Well-designed spaces with landscapes and connections that promote
	inclusivity and that meet the needs of everyone in our community (e.g. utilising
	garages for small businesses)
	Design that allows for entertainment and night life without impacting residents
Upskilling	The area offers a high standard business centre that has overcorre stigma by
	promoting Northern Beaches lifestyle
	Innovation hubs and innovative, co-working business environments
A A	Creation of a major hub to support a specific, niche innovative industry (e.g.
	moving people to mars)
•	Learning opportunities, including public training and courses in marine and
	coastal environment at universities, TAFE and health centres
	 Clustered activities, including within the health sector

Northern Beaches Council: Local Strategic Planning Statement Engagement

northern beaches council

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



A Future Northern Beaches

northern

beaches council

Each group creatively presented their vision for a future Northern Beaches in which these desired outcomes had been achieved. The results were insightful and entertaining.

Group 1 put pipe cleaners to good use to describe a future Northern Beaches where people were well connected with their immediate neighbourhood as well as with the broader community.



Northern Beaches Council: Local Strategic Planning Statement Engagement

12



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)





Group 2 presented a map of an example Northern Beaches centre where the shared economy has been embraced, space is set aside for rapid transit, cyclists/people and groenery and garages and other now redundant spaces have been repurposed for cafes and businesses.

Northern Beaches Council: Local Strategic Planning Statement Engagement

13



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Group 3 had propared materials to symbolise pristine Northern Beaches waters, community hubs, greenery, cycle and walkways, diverse housing options and an IT centre.





Group 4 uses pipe cleaners to present a vision of Northern beaches as a green, liveable place with multi-generational housing and well-connected town centres that offer night life and cultural opportunities. Climate change would be a top priority and quality waterways would encourage active lifestyles that improve health and wellbeing.

Northern Beaches Council: Local Strategic Planning Statement Engagement

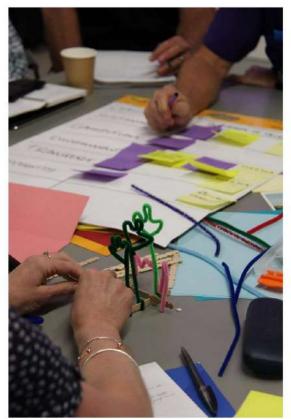
14



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Group 5 employed a mix of pipe cleaners and wooden materials to present their preference for a future Northern Beaches where *no growth* has occurred and where efforts have been focused on maintaining and improving current amenities.



Northern Beaches Council: Local Strategic Planning Statement Engagement

15



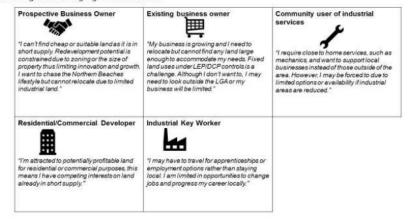
Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Tackling Wicked Problems

The following summaries provide an indication of the discussions by each group as they sought to identify solutions to each 'wicked' problem that would satisfy all avatar perspectives.

Retaining and managing industrial land



The avatars had mixed views about the use of industrial land. The *Existing business owner* wanted to see flexible spaces on industrial land (e.g. mixture of small and large spaces with moveable walls, rooftop gardens) to support small and large services. The *Prospective business owner* supported creative and flexible use of industrial land (e.g. atternate activities after hours). Others believed you need larger lots to accommodate larger facilities with the infrastructure in place to minimise impacts. They suggested that industrial land should not be taken over for other uses (e.g. gyms, cafes).

Participants saw the need for a balance between flexible zoning that allows for different uses while also preventing intense industrial uses that would lead to noise, odour, dust and other complaints – these 'dirtier, noisier' industries should be allocated specific areas away from residential areas. Participants supported the amalgamation of smaller properties to allow industry to grow (e.g. Brookvale) but suggested these larger sites should be purpose-built and adaptable, with infrastructure for managing impacts. They would also need larger buffers, better road access and stricter controls. Council might assist organisations in finding appropriate sites.

It was suggested that green space around industrial land would help absorb impacts and provide spaces for workers to have lunch but the group recognised this would use valuable space and add to the cost of the land. The group was open to worker accommodation but only on sites with 'cleaner' uses, partly due to safety.

The group observed that the Residential/Commercial Developer's agenda appeared to be most at odds with the other avatars and so suggested that the Local Environment Plan has to be strong to protect community and stakeholder needs. It was argued, for example, that developers will always make a profit if the area is well-designed so feasibility arguments should not lead to greater intensity.

In the end, the group generally agreed that

- · Building designs should be more flexible to allow larger spaces in one complex
- Land around industrial areas needed to be reclaimed to create buffers (e.g. along Pittwater Rd in Brookvale)
- Housing near industrial areas needs to be small to suit Industrial Key Workers while keeping costs down
- More height should be allowed on current industrial land (e.g. for warehouse space and manufacturing equipment) since no new industrial land is available

Northern Beaches Council: Local Strategic Planning Statement Engagement

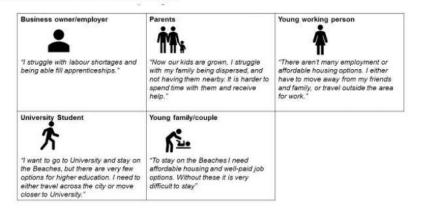
18



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)

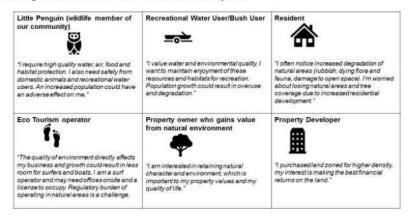


Less young adults in the Northern Beaches



During their conversation, the *Business owner/employer* offered the young people a cadetship to help keep them in the area. It was suggested, then, that employers should be incentivised to provide jobs for young people. A local university would also offer the educational opportunities to keep the *University student* and the culture and jobs to perhaps retain the others. Diverse housing models (e.g. build to rent, house sharing) were put forward as other ways to encourage young adults to stay. The group proposed that leaving home 'is a rite of passage' and so any measures were unlikely to prevent young people from leaving at all but acknowledged that variety of accommodation, jobs and cultural experiences would help ensure they return to raise families.

Protecting the natural environment from urban development



Members of this group began by suggesting zero growth in the Northern Beaches would alleviate any community pressure. The question was then raised – where can key workers and young people live now? The *Developer* proposed that he could deliver positive housing outcomes if he was engaged early. He also

Northern Beaches Council: Local Strategic Planning Statement Engagement

17

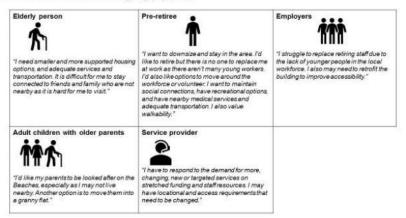


Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



said he could add value to the area (e.g. jobs, housing) and that – by providing taller buildings – he could provide community and natural space at ground level. Stocklands Club Totem was presented as 'good practice' development. It was suggested by another that young people leaving was not necessarily a problem – that it created more room for families. The *Eco Tourism operator* said they were in favour of attracting residents and tourists to the area to use their services, though wanted to see habitats protected from development. Others agreed they did not want development on bushland. The resident *Little Penguin* was smillarly concerned about environmental degradation and wanted to see a penguin habitat offered as part of any nearby development.

The Northern Beaches has an ageing population



The Employer committed to diverse hiring (especially from non-English speaking backgrounds) and a review of their business model to improve their capacity to replace retiring staff while the Service provider planned to do so through work experience programs. All avatars were open to universally-designed multigenerational housing as a solution. The Elderly person was happy to mentor younger people and babysit for their Aduit children in exchange for assistance (e.g. with manual tasks and technology). The Pre-retiree valued their position at work and felt downsizing was too expensive a process but were happy to rent out part of their home and volunteer to visit elderly people.

Northern Beaches Council: Local Strategic Planning Statement Engagement

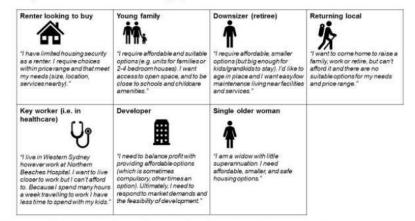
18



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



Providing suitable and affordable housing options



The needs of the different avatars, naturally, differed. The *Single older woman* and the *Key worker* were looking for long term rentals (5-20 years) to allow them time to connect with their community. One of the *Single older woman* looked to developers to support good, long term renters by rewarding them with lower rents while the *Key worker* and others suggested subsidies would more likely come from Government. Alternatively, the *Renter looking to buy* just needed a transitory space while the y looked for property to purchase. A *Single older woman* was happy to share a flat while she looked to buy.

Participants also identified required change to housing perceptions. The *Downsizer* – who was looking to downsize to meet their changing health care and other lifestyle needs – wanted to see developer-led incentives and increased acceptance of downsizing as a natural transition in the housing marketplace. Similarly, the *Young family* wanted to see boarding houses destigmatised and better located and connected to local character.

The Young family – who were looking for somewhere with good liveability and amenity – wanted to Government to better help them enter the property market. The *Returning local* was not very optimistic but suggested tweaks to building laws may help provide the additional/secondary dwellings they need to afford to live in the area. They also saw houseboats, tiny houses and caravans as other places to live in while saving to buy a house. The *Developer* built on these suggestions, proposing that a more flexible planning system would assist them in delivering co-housing, community title, adaptive re-use of building stock, secondary dwellings, dual occupancy and other alternative forms of housing.

Northern Beaches Council: Local Strategic Planning Statement Engagement

19



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



03: Focus Group Overview

The objective of each focus group was twofold:

- 1. To understand the participants' 20 year vision for the Northern Beaches
- To identify possible improvements to the draft LSPS priorities by asking the group to test them against their vision

At each focus group, participants were presented with key change factors (e.g. changing demographics, climate change) that the area is I kely to see over the next twenty years. They were then asked to describe their 20 year vision, which was captured under four headings: 'infrastructure', 'liveability', 'product vity', 'sustainability'. Once their vision had been expressed, the group was shown Council's draft priorities and asked how they could be improved to better capture the group's vision. The change factors, heading descriptions and draft priorities are all captured in the presentation in the Appendices of this report.

The focus groups generated valuable insights for the LSPS process, revealing that residents are generally aligned on some areas or prorities for future land use and planning whereas other areas/priorities unearthed divergent views. The vision each group described for their future Northern Beaches revealed some small gaps in Council's proposed LSPS priorities, with some participants also having specific recommendations for amending certain priorities.

Key points of alignment

Infrastructure

- Support for affordable mass transit and local connections to key services, including first/last mile services, with desire from all groups for cars to be replaced by public and active transport for short and long-distance travel
- Support for maximising use of existing infrastructure and for developing flexible, future-proof
 infrastructure

Liveability

- Support for mixing of age groups, including around schools and homes with common spaces where
 people can 'rub shoulders'
- Support for providing local facilities, services, educational opportunities and jobs that save people from having to travel out of the area (especially to the Sydney CBD) to seek these out
- Support for a local University, ideally a satellite campus with digital methods for connecting students with teachers and others. A number of groups suggested that such a campus could focus on health education given the new Hospital
- Support for socially-connected, diversely-mixed communities with wide-ranging suggestions on how this could be achieved. Ideas included:
 - Small, comfortable local hubs offering access to the internet, information (e.g. libraries) and community health services (physical, mental)
 - Localised systems such as neighbourhood energy networks
 - Community gardens, cooperatives, neighbourhood associations and 'third places' for people to 'hang out' and kids and dogs to play
 - o Local businesses that residents can become familiar with
- Support for recognising and honouring Aboriginal cuture and heritage (one group suggested Aboriginal people cculd help educate the community on sustainable environmental practices), though groups consistently suggested that this be extended to include other cultures within the Northern Beaches

Productivity

 Support for local economic hubs or co-working spaces that are not just retal; spaces where people, particularly owners of start-ups, can physically meet and develop connected business communities. The IT industry was regularly raised as a suitable industry for the area, with one group describing Northern Beaches offering the same lifestyle that originally attracted entrepreneurs to Silicon Valley. Tourism was also seen as a local industry. Groups were generally supportive of protecting industrial lands. The CALD group suggested making it easier for people to work from home, providing

Northern Beaches Council: Local Strategic Planning Statement Engagement

20



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



employment for people who leave school early and allowing migrants to contribute their skills to society by recognising their credentials and teaching them English.

- Support for a vibrant night life in appropriate locations so long as safety is also improved (e.g. lighting) to encourage all age groups to get out into the community
- Support for affordable housing, especially for local workers (e.g. health workers, tradespeople cleaners), with a recognition that the narrative needs to change around affordable housing to improve community support for them
 - A number of groups spoke about inclusive infrastructure and services that were accessible to an ageing population, people with disability and other groups
- General support for local arts and culture, including local artwork in public spaces

Sustainability

- Support for reducing human impact on the environment, including supporting sustainable development, growing tree canopy, reducing carbon emissions and protecting local biodiversity. Ideas for reducing emissions and environment impact included (but were not limited to):
 - Reducing reliance on cars for transport
 - Reducing the distance people have to travel to access services or work
 - Increasing the use of clean/renewable energy, including finding creative ways to generate it locally
 - Encouraging the 'circular economy'
 - Providing infrastructure for electric bikes and vehicles
 - Providing spaces for shared assets (e.g. cars)
 - Employing biophillic urbanism
 - o Using cata to optimise energy use (e.g. in the freight industry)

Key points of divergence

Growth and density

- A number of participants, particularly members of the Pittwater group, viewed the predicted population increase presented at the beginning of the session as a State Government directive rather than a predicted outcome. They appeared to hold the view that Council could lobby State Government to reduce the degree to which the population would increase over the next 20 years.
- Some participants across the groups did point out that an increase in population was inevitable and that the focus should be on developing the infrastructure and services in advance to ensure the Northern Beaches lifestyle was as good as it could be as changes took place. A few participants responded to this with the concern that new anc improved infrastructure would attract even more people to the Northern Beaches.
- Some participants expressed their interest in having parts of the Northern Beaches that provided
 affordable homes in walkable distance to services, facilities and public transport. They pointed out
 that 'critical mass' (i.e. certain population levels and density) was required to make such places
 teasible.

Centralisation vs decentralisation

Some groups (e.g. Pittwater) were more supportive of decentralised services and density through
the development of well-connected 'village centres' while participants in other groups (e.g. Frenchs
Forest, Manly) were more supportive of higher density, easily accessible centres near transport
nodes that could hold more residents and services. Other groups were in favour of a mixture of the
two. Ultimately, accessibility and social connection appeared to be important to participants no
matter the subcome.

Catering for young people -

 The majority of participants believed that young people should be able to remain in the Northern Beaches as they study, begin work and start a family. An affordable housing mix, good public transport, local educational institutions, local jobs, and family-friendly public spaces were all seen as ways to make this possible. They described integrated, multigenerational communities where young and old can live together and support and learn from each other.

Northern Beaches Council: Local Strategic Planning Statement Engagement

21



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



 On the other hand, some participants did not believe the Northern Beaches needed to be suitable or affordable for all ages. They suggested it was natural for young people to leave the area and return later in life.

Priority gaps

Participants expected that Council would test the session outputs against the draft priorities to identify opportunities to add or improve them. However, some gaps or amendments were made particularly clear:

- Almost all groups mentioned proactive action to address climate change as a priority, not just responding to its impacts
- When speaking about sustainability, groups spent most of their time discussing waste management, which is not explicitly mentioned in any of the priorities
- While ideas differed across the groups on what Council's focus should be, many groups were
 emphatic that Council should become a world leader in 'something'. Ideas included being leaders in:
 - Sustainability, including waste management (e.g. composting), using 100% renewable energy by 2040, reaching zero landfill, 100% resource recovery and/or achieving zero carbon emissions
 - Actively soliciting public/private technology and transport solutions
 - · Providing state of the art educational facilities
 - o Providing work spaces for IT entrepreneurs
 - Being the only Council to grow green space
 - Embracing new technologies (e.g. trackless trams, using airspace to transport people and items)
- A number of groups suggested the 'infrastructure' section could benefit from more than one priority, for example by breaking down priorities by infrastructure type.
- Groups regularly raised the importance of quality housing built "for the long term", including unique architectural design, high quality materials that protect inhabitants (e.g. fireproof) materials that reduce energy use (e.g. insulation), and inclusion of green elements (e.g. useable rooftop/vertical gardens)
- Community and stakeholder engagement and collaboration continually came up as an important priority. That is, that the community should be continually consulted on land use and planning over the next 2C years, with the potential to establish community champions of change. Some groups also suggested Council had a responsibility to advocate on behalf of the community when dealing with State Government. Others suggested Council should be earning from the successful or unsuccessful work done by other NSW Councils

Priority amendments

Common suggestions across the groups included that:

- 'Education' should be specifically referenced within one or more of the 'sustainability' priorities as community awareness of their environment and their impacts on it is or tical to them enjoying it and proteoring it
- Priority 31 should, like the other 'Sustainability' priorities, include 'enhancing' or 'improving'
- The 'growth' mentioned in Priority 1 should be defined. The group from Narrabeen suggested it should be defined in P1 as the kind of growth the group had described as their vision for the future Other groups similarly spoke about growth that supported liveability, productivity and sustainability priorities. A number of groups also emphasised the importance of infrastructure before demand, with the Narrabeen group again suggesting that the current infrastructure may be 'lagging behind' current demand
- Educational facilities should not just include a University campus but also smaller education or training hubs (TAFE and others) where people of all ages can learn

The Frenchs Forest group suggested

Including 'North Sydney' in Priority 15

Northern Beaches Council: Local Strategic Planning Statement Engagement

22



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



The Narrabeen group suggested

- · Priority 7 should make reference to parks, bike lanes and outdoor spaces that are easily accessible
- Priority 11 should include a reference to education
- Priority 13 should be elaborated on to outline who affordable housing would cater for (e.g. essential services workers) and what it would provide (e.g. sufficient size, nearby communal community spaces)
- Avalon should be included as a strategic centre in Priority 22
- 'Strengthen functions' in Priority 23 needed to be clarified (e.g. that the centres should build on their current, unique strengths)
- · Priority 25 should include 'support and develop nnovative industry clusters'

The Manly group suggested.

- · Priority 11 should include natural and other forms of 'heritage'
- Making specific reference to safe walking and cycling routes in Priority 16
- Priority 22 should include that the centres will be "supported by enabling transport infrastructure" providing good connections in and out
- Priority 36 should include high requirements for sustainable features on all new developments
- Including actions under 'Liveability' that focused on supporting the more vulnerable people in the community

The Curl Curl group suggested:

- Priority 13 should include for workers who support the community, with ownership or long term rental
 options that allow people to invest in the community and provide stability for their children
- Higher density in appropriate areas should mean ingleside, as mentioned in Priority 14, can be preserved as green space
- Priority 23 should include enticing industry into the centres and providing health facilities and services, with the centres acting as transport hubs
- Defining Priority 35 as 'green' open space (i.e. pedestrianised places for passive or active recreation where people can meet without having to spend money)
- Adding a priority to 'Productivity' on incentivising local entrepreneurship by making the area affordable and desirable, promoting hubs and providing the infrastructure to support local innovation (e.g. 3D printers)

The CALD group suggested:

- Including migrants' unique skills as part of Priority 24
- Enhance' in Priority 30 should refer to growing or increasing availability of bushland and biodiversity
- Including 'affordable renewable energy supplies' as part of Priority 36
- · Referencing 'multicultural hubs' in 'Liveability' section so migrants have somewhere to interact,
- access information and build confidence to find employment
- Including affordable public transport as a 'Productivity' prority
- Referencing 'natural beauty' (e.g. protecting resident views), 'educating people' and 'air pollution' in 'Susta nability' section

The youth group suggested:

- · Including a reference to 'building' infrastructure in Pr ority 1, not just planning for it
- · Priority 6 should be extended to equal medical treatment and healthy lifestyles for all
- Priority 10 should include community workshops that are easy to join
- Priority 14 should not result in big identical houses with no backyards
- Extending Priority 24 to include building skills relating to computers and emerging technologies for both young and older generations
- Including good transport in and out of night life locations as part of Priority 27
- Referencing 'sustainable and adaptable' transport infrastructure in the 'Infrastructure section
- Making reference to 'using and enhancing what we already have', as well as 'education' as part of 'Susta nability' section

Northern Beaches Council: Local Strategic Planning Statement Engagement

northern beaches council

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4) Page | 131



04: Focus Group Detailed Results

Monday 18	March -	Pittwater
-----------	---------	-----------

 Litt Prosch sch Lau 	ot spending time in cars" le developments in villages o pedestrian spaces and bikes. A need for active transport places including around
 Pro sch Lai 	
sch • Lai	pedestrian spaces and bikes. A need for active transport places including around
• La	
	nools
 Hu 	nes dedicated to modes of transport other than cars
	b and spoke transport
	cessible transport that accounts for people with disability
	ech leader that uses skills in IT to address community needs and needs for
22253	nsportation
	or to Door travel while reducing car miles
	aling with state government expectations
	ac infrastructure
	ure – Priorities
	owth should be something we want
	ad the way with sensible growth
	urcil listen to community and follow through (enforcement)
	urcil has integrity - they actively work towards the agreed and intended vision
	nage existing infrastructure to meet community needs
Productivi	
	ractive to tourists, so they see how beautiful the area is
	water used as asset around ecological and recreational capability
	eat technological innovations in order to be creative in this area
	empty shop fronts
	nnectivity between community so everyone knows and understands what others are ering and how they can help
	urism cannot be allowed to destroy sense of community
	ance job growth with ecology and liveability
	hools with multiple age groups existing around them
	bouce great schools locals want to send their kids to: have population to fill them
	ty – Priorities
	ere's a concern that universities will lead to population density around campuses.
	nsider virtual university/hub or smaller scale (satellite).
	n't want to become a university town
	mmunity needs to understand the reasoning behind whatever we do
	re economic hubs - need some physical space to bring community together
	Itiple smaller hubs e.g. libraries, comfortable, internet access
	egrated communities with a focus on liveability
	duce emissions
	duce reliance on cars whilst still providing accessible door to door travel
	ility – Vision
• Srr	naller houses
 Pre 	eserve biodiversity and habitat retention
• Co	nsider the 'local ecology' comprising families, environment and systems e.g. energy,
pov	wer and micro grids
	an energy
	listic approach and measurement – "doing the right thing"
	urcil at the forefront of something e.g. a local movement like composting, world leading d difficult challenges
	sure the community is aware of the environment around them. They should be educated d appreciate the environment.
	perience of environment linked to education
	ints to consider
	 Focus on recyclable, user pays system / Sustainable development

Northern Beaches Council: Local Strategic Planning Statement Engagement



Page | 132



Susta	nability – Priorities
	Working with EPA measures and aligned with State government
	Emphasis on support: generally and for tree canopy. A preference for varied vegetation
	that is ecologically appropriate
	Make less waste a priority and encourage people to produce less waste, more than simply
	just increasing recycling.
	Have individuals and businesses involved in this action to reduce waste (incentives for
	retailers)
	Aim for zero carbon emissions. Create sustainable built environments
	Initiatives around private native gardens. Focus on benefits for biodiversity and heat.
	Address weeds e.g. through regulation
Livea	bility - Vision
	Non-centralised public spaces, but decentralised and localised.
	Establishing a "town centre"
	Related services grouped together e.g. specialists and service providers. Aim for local first
	and move to bigger hubs if needed
	Access to health and community services E.g. Mona Vale public land
	Aboriginal culture/ neritage important e.g. research into history and included Indigenous
	place names at locations
	Consult Indigenous influencers throughout this process
	Public art such as laneways and use local and existing talent. Create programs to
	encourage people to create
Liveak	ility - Priorities
	Age in place
٠	Encourage diversity through current buildings – not about new unwanted development. More about building community
	Spaces for connection, including across age groups, around schools
	Planned, small communities with common spaces. Where people can "rub shoulders"
	Integrated (old, new and different buildings)
	"Wonderful little things" done well rather than big zones of development etc.
	"Little villages"
	Have a range of recreational activities for people
•	Flexible and adaptable housing (re-use). Encompassed by flexible property laws such as selling off sections of land "fine grain"
	Connection to each other and the world through technology
	Don't want to look the same as other developments elsewhere. Localised development
	Proper planning controls for development
	Safe environment
Gener	al
	Reluctance to population growth
	Manage what we have better
	Push back to state government collaboration
	"not about outsiders moving in"
	Preserve and adapt using what we have
	Growing while protecting the environment and encouraging tourism

Tuesday 19th March – Frenchs Forest

Gener	al
:	Engage people on what they need Question about whether local government should be responsible for these priorities (mixed views)
Infras	tructure – Vision
4 4 9 9	Access to shops and sporting facilities. Close proximity and the right mix of these facilities Internet and connectivity – broad social connection Walkable/ ridable city with access to services. Adopt a change mindset towards cyclists Light ng and safety taking note of elderly groups. Safety in regards to increased density Support for 30 minute travel to city for work, going out at night. Will need the support of the critical mass to achieve this

Northern Beaches Council: Local Strategic Planning Statement Engagement

25



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



	Implement feeder services and places for commuter parking
	Mix of public and private transport. A shared economy
	Hub and spoke development e.g. hubs along public transport 'stops' with spokes heading
	out from there
ofract	ructure – Priorities
	Planned (hub/spoke)
	Breakdown by infrastructure type
	Quality infrastructure e.g. homes
	Avoid duplication of provisions within close proximity of each other
	Faster planning cycles to "get on with" infrastructure
Produ	ctivity – Vision
	Affordable housing and local industrial land for tradespeople
	Commercial mixed developments, not just retail
	ctivity – Priorities
	Support workers for quality infrastructure (health, tradespeople, cleaners)
	University natural extension of hospital?
	 Good — prevents young people from travelling into the city
	 Frenchs Forest possible location for this
	Actively solicit public/ private technology and transport providers to deliver solutions - be
	leaders in that space. Plus help to fill our transport infrastructure gap
	Include North Sydney in P15
	Neec jobs to connect people
Sustai	nability – Vision
•	Waste management systems, to prevent reliance on China
	Green connections
	Room for greenery
	 On private residential bocks
	 In public spaces including near apartment blocks.
	 This helps reduce energy from the air conditioning etc.
	Quality of construction - reduce energy use and make it fireproof. Build for the long term.
	Sustainability is important
	 Diversity of national parks
	 Plan for it
	 Lead by example, globally
	 Shared green spaces – improving them within walking distance of home
	 Family friendly
	Embrace renewable energy / battery storage (learn from the Western suburbs)
Suctoi	
	nability – Priorities
•	Community farming
	Educate people on why we need to protect the environment and Aboriginal history with
	land. Including permaculture and educating farmers. Plus waste management
	Courcil take leadership position on sustainability
	More focus on improving not just protecting what we have
	Smart buildings e.g. no black rooves, insulation, innovative building materials
	Managing waste cost effectively
	Encourage circular economy (including at point of resident)
	ility – Vision
	Know your neighbours including retaining character
	Planning for young people – allow them to return. To do this
	 Housing options for all, a mix e.g. terrace housing
	 Close to transportation
	 Sharing spaces/ buildings
	 Good quality housing
	 Retain large building/ fewer people areas (individual concern)
	Stages of life – keep people interested in areas
	An integrated community – young and old living together. Education from the elders and
•	vice versa
:	

Northern Beaches Council: Local Strategic Planning Statement Engagement



Page | 134



Allow for development mix – not all the selected locations that makes sense. Allows for supportive infrastructure and services

- Social spaces for apartment blocks
- · Places to raise a family
- Quality construction to reduce energy use: fireproof and double glazing
- Affordable housing including for young people and tradespeople, "we've created an environment for rich people"
- New terms for accommodation to overcome stigma
- · Allow for merit-based approaches to development requires flex ble controls
- Developers giving back to community facilities

Liveability – Priorities

 Allow different people to fit into community – appropriate mix of housing (flexible and organic)

- Enable social connection
- Developers renventing in communities
- Vibrant places to eat and drink in strategic and local centres live music etc. "drinking holes"
- Walkable, mountain bike tracks for young people
- Ingleside prioritise density over sprawl
- Mental health spaces like Men's Sheds for people to provide social integration and prevent social isolation
- Find ways to connect across generations, pass on knowledge etc.

Wednesday 20th March – Narrabeen

Infras	ructure - Vision
•	Direct lines at key times to universities and other major destinations Less focus on roads and cars, greater reliance on public transport is key to give people more options Small, local services feeding into peak time buses (everyday). More of them operating at a regular schedule to save people from having to commuter park Transport for offshore communities
	Enable efficient connection to jobs outside LGA
Infras	ructure - Priorities
•	Good accessibility to and from centres "What do you mean by growth?" Should be to support the kind of growth we've described as our vision. Also, need to support the growth we've already had (e.g. transport) as "it's lagging behind"
	In addition, emergency services need to increase
	Include timing and community champions of change
	Engage community throughout and adopt a position of accountability
Produ	ctivity - Vision
	Protect industrial land
•	Support freight connections, including to cope with increasing demand in online shopping Medical hub potential c Needs housing c Offers local jobs c Needs warehousing (links to spaces)
•	Deregulation and decreased rental prices to support local, small business nightlife Hubs for young people to hang out Affordable Middle ground between small town and larger scale e.g. Manly Subsidies to support small business
	Retain land for IT and start up hubs plus future focused and exciting industries
	Cultural driven economy such as theatres
	Bush care regeneration economy
	Aboriginal heritage economy
	Recognise move from physical to online such as shopping

Places where people working alone can gather together and collaborate. More physical connection

Northern Beaches Council: Local Strategic Planning Statement Engagement





	ctivity - Priorities
	Retain rural areas to support local economy
•	Mass transit' shou d mean public transport
	 Prioritise public transport over cars e.g. blocking car access to streets to support
	active transport and walkable domains. E.g. Dee Why Esplanade
	 However still providing road access when needed e.g. tradies servicing property
	and considering impact on existing businesses
	Increased access for people with disability e.g. transport, parks, accommodation. And
	consider catering of ageing copulation
•	Add Avalon as strategic centre, including capturing its art culture
•	P23 – clearer wording than 'strengthen functions'
	 Should build on the unique, current strengths of each centre.
e uctoi	P25 – support and develop clusters inability – Vision
e	Beware of overdevelopment
•	 Development in the right places, safe places e.g. to avoid bushfires
	 Building on centres
	Addressing climate change nelps reduce heat, therefore reduced impact on the elderly
	Sustainable in all ways (people, environment)
	 Don't build near natural hazards (flood plain etc.)
	 Don't build ried hatgian hazards (1000 plain etc.) Not all the same
	 Green spaces (not all buildings)
	 Places for kids to play
	Proximity to greenery and bushland
	Guide – how many people can we sustainably fit? Provide places people can live in
- 2	All houses with mechanisms for generating energy sustainably, feeding into the grid
51	 Water catchment and waste management per house (composting, edible
	community gardens)
	 Food sustainability
	Educating children
ustai	inability – Priorities
	Agree with P37 and P32 (retain rural areas), provide certainty and protect from extensive
	housing development
	Protect and (utilise/showcase/understand/adapt) environment
	Be bold and long-term focused (e.g. "zero em ssions council" and new buildings that are
	more energy efficient and carbon neutral)
	Don't develop in natural hazard areas
	P37 needs to be more proactive (e.g. "we will take proactive steps to reduce impacts of
	climate change")
	"We are a leader in sustainability"
	Find ways to generate renewable energy in Northern Beaches
iveat	pility - Vision
	Housing for medical bub workers (nurses, cleaners etc.) in close prox mity to work
	Housing for medical hub workers (nurses, cleaners etc.) in close proximity to work Prioritise community through creating local communities. This is important in an
*	Prioritise community through creating local communities. This is important in an
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less intimidating environment with close proximity to meeting other locals. A need to retain land
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less intimidating environment with close proximity to meeting other locals. A need to retain land for these facilities
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less intimidating environment with close proximity to meeting other locals. A need to retain land for these facilities
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less intimidating environment with close proximity to meeting other locals. A need to retain land for these facilities Some higher density centres to meet the needs of people who want to live in this style of housing. This will help to revamp and activate "ugly" areas
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less intimidating environment with close proximity to meeting other locals. A need to retain land for these facilities Some higher density centres to meet the needs of people who want to live in this style of housing. This will help to revamp and activate "ugly" areas A more contemporary and progressive approach to leading schools. This should be run to
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less intimidating environment with close proximity to meeting other locals. A need to retain land for these facilities Some higher density centres to meet the needs of people who want to live in this style of housing. This will help to revamp and activate "ugly" areas A more contemporary and progressive approach to leading schools. This should be run to assist the 30 minute city concept and retain young people
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Control of Cont
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Smaller health and education facilities and community centres. This creates a less intimidating environment with close proximity to meeting other locals. A need to retain land for these facilities Some higher density centres to meet the needs of people who want to live in this style of housing. This will help to revamp and activate "ugly" areas A more contemporary and progressive approach to leading schools. This should be run to assist the 30 minute city concept and retan young people . Access to special needs hubs and schools . Cater for people coming south from outside area
•	Prioritise community through creating local communities. This is important in an increasingly online world. Facilities like bigger community gardens and co-operatives to be considered, people crossing paths, public transport and social places to hang out A sense of familiarity with small businesses Barbecue and food areas A mixture of cultures and races, an integrated community Control of Cont

Northern Beaches Council: Local Strategic Planning Statement Engagement

28





Liveability - Priorities

- P13 elaborate, including for essential services. Who is it for? Ensure that different groups are catered for and their long-term needs are met. Think about decent size, living spaces integrated with the community
- •
- A need to be careful with the scale of campus There could be an education and training hub to cater for young and old, as well as TAFE students
 - Ċ.
 - C.
 - Ċ.
 - Good internet connectivity State of the art facilities that position as a leader Blur the line between TAFE and University e.g. bridging courses Provice local places for part time study to cater for people already in the workforce
- A need for community health service hubs
- Hubs with spaces to meet and recreational outdoor activities
- P11 – about education
- P7 parks, bike lanes and outdoor spaces should be specified Make the most of existing spaces .

 - Accessible facilities in close proximity

Thursday 21st March - Manly

Infras	tructure - Vision
٥	Free parking?
	Overlap with liveability "density and smart density done well"
	30 minute city support, can we achieve this?
	Not just about "funnels out of the place"
	Bring things here
	Preference for infrastructure before population growth e.g. pinch points
	Reduce congestion locally and free up assets to support vibrant spaces
nfras	tructure - Priorities
	Improve North/South connections to "make use of the whole Northern Beaches"
	Neec direct public transport connections (e.g. to/frcm hospital)
٠	Flexible transport connections that discourage car use to allow fcr future changes in the way we get around. Can't just deliver infrastructure designed only for present day transport modes
•	How do we make "sustainable growth" work for us and not to the detriment of community and environment
rodu	ictivity - Vision
	Preserve big natural spaces for tourists which strategically goes back into supporting
	environments
	Small high-tech spaces like "Silicon Beach," people need to know about them
	Attract IT industry
	 Live, work and spend locally
	 Attract them with the Northern Beaches lifestyle and a quality and innovative retreat
	 Local TAFE and industry education building local skills in IT Idolise science professionals
٠	"Play to the demographics" and facilitate work and skill building opportunities for senior people
٠	Encourage flexible workforce. The classic 9-5 doesn't suit Northern Beaches lifestyle
٠	Ensure a good marine biology setup
*	Institutions that leverages off existing educational organisations etc. (e.g. at Mona Vale Hospital)
	 Located near public transport nodes
٠	Skills and infrastructure available locally for IT and incentives
٠	Support to start-ups
	Health as a centre of excellence. Build and attract skills for this
	activity - Priorities
•	Be clear that active transport means walking and cycling – safe routes and separated lanes e.g. over Spit Bridge to make viable commuting option
	Support electric bikes e.g. power station locations

Northern Beaches Council: Local Strategic Planning Statement Engagement



Page | 137



	"Workable connectivity into Northern Beaches that is sustainable for the population that we
1	have* Use what we want to be known for as the guide (is it a given that we are less accessible?)
	Safe night-time economy
	P22 – needs good connections in and out i.e. "supported by enabling transport
	infrastructure"
	Improved transport connections attract good workers and professionals e.g. nurses and
	doctors
usta	nability - Vision
	Clean and accessible beaches with amenities nearby
	Current great sense of pelonging with nature
	 Easy to 'get in touch' e.g. Manly Dam described as a "pot of cold"
	 Big and small e.g. green spaces, playgrounds, community gardens, trees
	o Walkability
	Be on cutting edge of sustainability conversations
	Natural environments and connection to nature to support mental health
٠	Clear boundaries around green spaces?
	Be bold and be a council that grows green spaces
	Create big enough spaces with green links to support biodiversity, habitats and inclusion of
	waterways to ocean
	Build density in centres to protect outskirts
	nability – Priorities
	P36 – high requirements for sustainable features on all new developments
•	P34 – good for reducing heat
۰	Need to generate more energy locally plus promote and create opportunities for
	apartments to do this
	Spaces for shared assets e.g. cars Air space to facilitate transport, celivery and accessibility of goods and people including
	and space to racinitate transport, cenvery and accessionity of goods and people including landing spots etc.
	Trial and plan for impacts (noise management etc.) on residents and environment
iveat	ility - Vision
	Affordability inclusive to young, old and service workers. Reduce travel to obs and find
	more workers
	Current community is special. Increased need for neighbourhood and bigger level spaces
	to interact with each other e.g. dog parks, "third places," places for business, community
	centres
٠	More schools and medical facilities in Northern Beaches to achieve 30 minute city and
	reduce cars on road
•	Stockland looked on as an example of residential and mixed lancscape rooftop
٠	"Village feel" important when bringing facilities closer – amenities for locals not always
	tourists. Plus, 'creative town planning" that is "proactive' and "meets the needs of people"
2	and is tailored to each village In residential zones, a need for predictable outcomes from DCP/LEP that protect amenities
•	(vies, privacy, overshadowing
	Maintain community spirit not "fractured streets"
	Safe spaces and green spaces at street level to accommodate (e.g. kids playing outside)
1	Opportunities to interact with neighbours and like-minded people
2	Neighbourhood associations generating ways to develop neighbourhood groups
	Neighbours speaking with each other before renovating
	More cultural opportunities (e.g. Children's Theatre)
	Local health centres with good transport and accessibility to and from these centres
	Wellbeing including mental health and suicide rates should be the main consideration in
-	planning decisions
	Attentive to diversity and multicultural needs
	Flexible buildings and homes to be made future proof. Plus spaces used for multiple
	purposes and smart use.
	Repurpose spaces that are no longer fit for use
• iveat	Repurpose spaces that are no longer fit for use illity – Priorities
• iveat	

Northern Beaches Council: Local Strategic Planning Statement Engagement

30





protecting heritage

- Protecting heritage Pushing housing into rural areas Protect to some degree Respect rural heritage Support equitable development and allow future generations to improve liveability without impacting others Small and sensitive development Local spaces should include parks

Tuesday 26st March – Curl Curl

Infras	tructure – Vision
•	Cars present long term issues for connection and people should be encouraged to leave them at home when commuting (e.g. commuter park for cyclists as seen in Japan, or more cycle hires should be offered)
	A commute to university should be one hour or less
	Faster public transport
۰	Cycle-ways should be better and safer (e.g. separate lanes)
•	Build future-proof infrastructure (e.g. tunnels big enough to be repurposed for fast train)
	Be bold about acknowledging unknown technology will be part of our future
•	Reduce commuter traffic by enabling people to work from home Local public transport solutions like 'trackless trams' to give priority to public modes of
	transport. It could also activate strips of shops (for example as seen in China)
	State Government to improve how they listen to Councils, businesses and the community
25	on planning decisions so that citizens are engagement and interested in issues which
	affect them
nfras	tructure – Priorities
	Prioritise public transport
٠	Build the infrastructure space
	Include more about empracing new technologies in the infrastructure space
	Build infrastructure with its long-term capacity in mind
	 Allow space we can grow into" Adaptive spaces and infrastructure that can be repurposed (current infrastructure
	and future infrastructure)
	 Build for long-term now rather than in bits and pieces over time – break habits now
	(e.g. reduce car use earlier)
	Priority around reducing car use
•	Make people more mindful of their impact on the commons (e.g. trading schemes for car use)
•	Learn from lessons (good and bad) from across NSW, Australia and the world (e.g. M7 having to be upgraded 5 years after it was built)
Produ	ctivity – Vision
	University on Northern Beaches
	Local jobs in local waste centres
	Jobs that are more than just in the retail and industrial sector
	 More commercial space
	Preserve employment land
•	Enable people to work closer to home through co-working spaces for a work-life balance (Council, private-run). Co-working spaces are needed especially for start-ups as well as for CBD workers (conference facilities, own space)
	We need to learn from Parramatta Council's efforts to attract businesses to the area in
	midst of growing population
	Local jobs for white collar' professionals and/or better support local remote
	workers/satellite offices
Produ	ctive – Priorities
	Embrace new technologies (e.g. light corridors with drone-like taxi airways)
٠	Use technology and co-study spaces to enable people to work from home
•	P23 – 'Strengthening' should include enticing industry into centres. The centres should also be transport hubs (without neglecting other areas). Health function also important

Northern Beaches Council: Local Strategic Planning Statement Engagement

31



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



F	
•	Add something on incentivising local entrepreneurship through making it affordable and
	desirable compared to elsewhere
	 Including promoting existing/new hubs
	 Include infrastructure to support local innovation (e.g. 3D printers)
Sustai	nability – Vision
	Consider transport impacts on environment
	Council 100% renewable by 2040 (U.S. Councils are doing this)
	Reduction in waste (e.c. smaller bins, behavioural programs, educating, regulations, plastic
	packaging, and compost at household and Council-level)
	Rebates on composting?
	Bold goal for zero-landfill (e.g. change martials we use, remove single-use plastic from
-	Northern Beaches in the next 5 years)
	 100% resource recovery
	Catch up with the modern approaches to co-mingled waste-recycling
	 Build own Council waste centre?
	Dedicated container deposit schemes (work with shops, Council etc.)
	"Local waste solutions" – local jobs/less transport
· ·	
e Curta	Litter and waste issues mitigated by educating the growing population
Susta	nability – Priorities
•	Add more on collaborating with community on trade-offs
	Sustainable and healthy built environments
	 (e.g. supporting mental and physical health of communities to help those
	experiencing isolation, depression, anxiety)
	 Also use power generating materials
	Commercial developers should have to build efficient buildings and that's what efficiency
	should mean (e.g. insulation, using renewable resources, waste minimisation)
	P35 – Should mean green open space (e.g. passive/active recreation trees, bush) –
	places you can "sit and linger", pedestrianised, where you can meet people, don't have to
	spend money
	Ensure the beaches are preserved and protected
Liveak	ility - Vision
	The physical and mental health of the community is important
	 Neighbourhoods should be walkable
	 People should feel connected to their neighbours
	Protection of open space and green space in certain areas (e.g. Manly War Memorial Park
	as 'lungs of Northern Beaches')
•	"Rethink low density"
	 Increase some density (e.g. along Pittwater Road) to reclaim some low density
	areas as green space however this requires community buy-in into this lifestyle
	Large enough homes in close proximity to parks to entertain visitors
	Developers required to deliver parks for those they are accommodating
	People should be "within a 20 minute walk of a park, library, community centre, transport"
	There should be a mix of ¼ acre blocks, townhouses, apartments
	Emphasise communities and supporting community groups and spaces in high-density
	areas
	 Community groups should be in proximity to community gardens, shared spaces
	for activities, community-run facilities, skills and knowledge sharing.
	 It "gets single people and others out into community"
	Learn from density done well in Parramatta
Liveat	ility – Priorities
Let y Colk	Artwork in public spaces (e.g. Indigerous art, live music, dancing)
-	 It creates character, attractive, safe and activated spaces
	 Northern Beaches need "somewhere people can make their own" and places for
	"urban activism"
1	Participants called priorities "a pretty good reflection of the conversation we just had"
•	A participant noted that "If I hadn't had to leave the Northern Beaches for university, I
	wouldn't have'
	TAFE's scope should also be increase to serve communities needs
	 Use technology to connect local students "virtually" to university campuses
	esewhere with dedicated but flexible multi-purpose facilities to do your course, and
	telecommunications facilities

Northern Beaches Council: Local Strategic Planning Statement Engagement

32





Places for people of all ages

- There is a gap between children and seniors who are well-caterec for
 Cater to different interests "Speak with these people to understand why they do what they do"
- "Intergenerational hubs for mingling" and "understanding rathe than tribes"
 Support walkability across the Northern Beaches through providing services in close
- proximity and through identifying hubs which are affordable and localised
- Public transport to connect people in lower density areas to walkable hubs, including smaller modes of transport (e.g. hop, skip and jump, scooters etc...)
 "If you can't bring the hubs to them, bring them to the hubs"
- There should be high quality architectural design (i.e. planning controls that enable developers to 'take risks' in their design)
- Places people enjoy being in which are inspiring, pleasant, sculful, artistic
 P14 Shares view that higher density is preferable so areas like Ingleside can be
- P13 Affordable housing is needed for workers who support the community. This should
 include rental and ownership, or long-term rental so people feel invested in the community
 and place, and they have the freedom to do what you want with the space for stability and
 continuity (including for children)

Wednesday 27th March - CALD Focus Group

Infrastructure - Vision Get cars off the road by improving public transport/affordable fares to encourage people to use Safe and secure footpaths, lighting especially near transport nodes and including in . suburban streets with communal spaces. This will encourage walking and will better the elderly through preventing injuries Sports and cultural centres which will give young people healthy (mental/physical) things to do; and are accessible by public transport Affordable community transport Commuter parking or similar (e.g. little buses - hop on/hop) Picking up elderly people who don't have adult children around to help/give them a hand setting in – can request a lift Safety around schools to reduce injuries (e.g. crossings) Infrastructure - Priorities Better roads and public transport . . Connecting community hubs Infrastructure must come with growth or will be unstainable Look ahead when providing infrastructure to be flexible to meet changing needs Continually monitor to ensure infrastructure is matches to growth Low pollution solutions Productivity - Vision Jobs for all people Free or reduced cost after school activities to enable people to work later Attract big businesses to area given Beaches are somewhere people can enjoy working and living Jobs other than hospitality and aged care Low pollution industries People more easily working from home (reduce traffic) Affordable child care Provide employment for people who leave school early (e.g. apprenticeships, factory work) Migrant credentials recognised Migrants taught English so they can contribute their skills to society Language classes to bring people together (including visitors) Opportunities for all ages **Productive – Priorities** Supportive of mass transit like B-Line Transport links should extend further up northern part of Northern Beaches which will • reduce car use

Northern Beaches Council: Local Strategic Planning Statement Engagement

northern beaches council

Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4) 33



	Should include localised public transport/feeder' services – "transport that winds around
	side streets" (including on hilly roads)
	Extended hours of transport operation
	Affordable public transport is a top priority – "no point delivering all that if people can't afford to use it"
•	P24 – Should include migrants' unique skills (e.g. community centres that facilitate migrants)
•	Connect migrants to jobs <u>outside</u> of industries they usually work in (cleaning, hospitability, retail etc.)
- E	Mentoring opportunities for migrants
	Opportunities for people to volunteer and give back to their communities
Susta	nability – Vision
•	Trees in parks – protection from sun and near beaches
	Renewable energy lighting
1	Retain trees and green open space
	Look after aesthetics
	Use experience of different cultures in caring for environment
	Water conservation, recycling (e.g. affordable water touts for every home) Education around conserving resources, packaging and recycling
	Less private lawns – more community green spaces
	Preserve the great facilities we have around waterways - more of them for growing
	populations More cycle-ways linking corridors, not having to 'brave' main roads
	Affordable electricity (e.g. solar energy) – locally sources power – reliable energy
	Sustainable shopping centres (e.g. solar power, infrastructure for electric cars
	Incentivise people to 'go green'
	Groups working together to care for environment
	Encourage local farmers to deliver produce locally, with non-disposable packaging
	Promote public transport system – showcase convenience
	Usable and clean waterways
Susta	nability – Priorities
	Enhance should mean 'protect and grow' – increase availability
	Use existing space where possible
	Include something on protecting natural beauty (e.g. not blocking resident views of that
	beauty – height restrictions etc.) – trees and buildings not blocking views
	Greenery in public places
	Include something on educating people about all of the these elements, why they're
	important and how we care for them (including migrants helping educate locals)
*	Give people access to environment and reasons to visit (e.g. workplaces, things to do in environment)
	P36 – Should include affordable renewable energy supplies
	Include something on air pollution (e.g. retaining trees for air quality)
Liveak	sility - Vision
	Cost of living - rental housing which will keep young people in the area
	Rental housing which young people are able to rent for themselves
	House homeless people ("safe houses")
	"Northern Beaches as one big community where people are healthier and happier" -
	services to support this
	Social housing supported by community
	"Include people from all walks of life" – not an 'expensive retirement area'
•	People spread out, using land available (one view) versus higher density/communal green spaces
	Own space as well as public space
•	Privacy in homes allowing people to live in harmony
	Make it affordable and easy for communities to organise cultural events
	Community/social connection – see neighbours/mix
	Downsizing options (small homes in community)
*	
	Affordable housing for migrants

Northern Beaches Council: Local Strategic Planning Statement Engagement





٠	Sate and social night life like we have overseas (e.g. up to midnight) which is sate for
	young people and families.
	Community centres running events (including in Dee Why)
*	Well-utilised, promoted, purpose-built community hubs for all people and ages (lots of small ones)

 Sporting facilities – numerous facilities so young people don't have to compete
 Migrant 'welcome packs' in different languages about living in area, transport options etc. for safety and wellbeing

a second s	tor ourory units inclinening				
Liveat	Liveability – Priorities				
	Parks and play areas for young children in town centres with undercover areas				
	Multicultural hubs for migrants to interact, access information and build confidence to get into work or other activities (e.g. like other councils)				
	P6 – Extend Aboriginal to multicultural recognition and honour				
•	Include something on access to affordable health services and facilities with more small				

 activities) These health services and facilities should be multipurpose with shared, comfortable spaces, whilst having spaces for friendship. It is an opportunity for different cultures and communities to learn from each other Outdoor wellness spaces and activities (e.g. Tai Chai) Character and lifestyle can't just mean surfing culture but should also educate people on 	٠	Include something on access to affordable health services and facilities with more small health centres (including baby centres, yoga and meditation, nutrition, and other wellness
 comfortable spaces, whilst having spaces for friendship. It is an opportunity for different cultures and communities to learn from each other Outdoor wellness spaces and activities (e.g. Tai Chai) Character and lifestyle can't just mean surfing culture but should also educate people on 		activities) These health services and facilities should be multipurpose with shared.
 Outdoor wellness spaces and activities (e.g. Tai Chai) Character and lifestyle can't just mean surfing culture but should also educate people on 		comfortable spaces, whilst having spaces for friendship. It is an opportunity for different
Character and lifestyle can't just mean surfing culture but should also educate people on		
		Outdoor wellness spaces and activities (e.g. Tai Chai)
	4	Character and lifestyle can't just mean surfing culture but should also educate people on how to swim safely

- Cultural festivals
- Housing developments that mix retirement homes with family homes for healthier communities and integration – multigenerational communities

Thursday 28th March – Youth Focus Group

Infras	tructure – Vision
	Use of a Teleporter – "So I can live far away from stuff but get there fast".
	A bus direct to community centre
	Train (between high density houses and community centre)
	Bus to main suburbs
	New sustainable transport systems (e.g. bike paths)
	Short, Clean trips
	Better bus routes, which run more frequently extended hours
	Easy-access footpaths with good pedestrian traffic lights
	Good, fast 'first mile' connections
	Active transport infrastructure (e.g. cycling, walking)
	Use data services to better understand our community and make better decisions
	Close proximity to transport nodes to take us to places far away fast
	 But minimise construction impacts on people and environment
	It is unsustainable for everyone to keep commuting in and out of Sydney CBD - we need to
	decentralise Sydney, make use of technology to work together virtually and make good use
	of our local services / facilities
•	Neec local links to local hubs (not just to city) to reduce congestion
	Don't keep creating car based in rastructure that encourages car use
•	Flexible infrastructure
100.000	tructure – Priorities
٠	Include something on sustainable and adaptable transport infrastructure
٠	Safe transport (e.g. safe motorcycling lanes)
	Sleeping cods in centres near workplaces and/or places where students, workers, and
	others can get free mental health services
٠	"Sustainable infrastructure to support growth and communities"
	Also BUILD IT
	ctivity – Vision
•	Hospital work
	Science centre for young kids encouraged to "make something out of recycling".
*	Living and working in Northern Beaches
	Upskilling people (e.g. TAFE, community college) for future skills
	Working with a view (work and lifestyle)

Northern Beaches Council: Local Strategic Planning Statement Engagement





٠	Flexible job (including hours) to care for family too
	Assist local businesses in using data to better serve customers
•	Rezoning to put businesses closer to residential to drive job opportunities. (e.g. ground-
	floors business with housing on top)
	Collaborative workplaces locally
• Irodau	Less travel for work means more time which supports the local economy ctive - Priorities
	East-West links improved locally (i.e. within the Beaches)
	Agree that Mona Vale connection is important
	 About connecting larger centres
	Support bus infrastructure more, corridors (including to growth areas)
- Q-	Active transport to public transport nodes and facilities
	Emphasis on first/last mile services
- 2	Keep community health and safety in mind with new infrastructure proposals (e.g. Smoke
0	stacks near Tunnel), would require consulting with the community
2	Mix of mass transit (direct) and local public transport connections to meet different needs of
51	different people
	Reduce number of interchanges per trip if possible
÷.	24/7 public transport services
	P24 – Include computer skills and skills around emerging and changing technologies (for
-	young and old)
	 Mandatory in schools
	 Supporting girls and women to learn STEM and IT skills
	 Enabling older people to stay social virtually, connecting to their family and to new
	entertainment sources such as podcasts
	P27 – support it but needs good transport to and from a night out
	More co-working spaces, especially for supporting start-ups who have minimal resources
	to begin with
iustai	nability – Vision
	Local recycling spots, encouraging "Earn and Learn", which would educate people on
	environmental impacts
	Community worm farm
٠	Dog parks
	Clean Northern Beaches
	More recycling bins and knowledge about the zero waste lifestyle
	c Keep cups
	 Less plastic use Bia essuab bias
	 Big enough bins
	Unique buildings with green elements (e.g. rooftop, vertical gardens) that are useable such
	as communal gardens, trees to read under Bushwalks and coastal walks
	Beaches and coastal walks
- C	Beaches without coastal erosion
<u> </u>	Biophillic urbanism including lots of green spaces in town centres such as gardens on
<u>.</u>	buses like Brazil
12	Renewable energy (solar and wind)
	Creative ways to generate electricity (piezo electric tiles)
- Q -	Use data to optimise (e.g. freight) to reduce emissions
	Minimise construction impacts on environment
-	Utilise and enhance infrastructure we have e.g. repurposing bus stops
	nability – Priorities
	Renewable energy sources (e.g. hydrotherapy given the coast location)
	Renewable energy sources (e.g. nydrotherapy given the coast location)
•	Incentives provided to people to reduce emissions (e.g. subsidizing solar papele on homes)
•	
*	Avoid long-shore drift/coastal erosion/flooding care for marine life
*	Avoid long-shore drift/coastal erosion/flooding care for marine life Include something on using and enhancing on those things we already have available to us
*	Avoid long-shore drift/coastal erosion/flooding care for marine life Include something on using and enhancing on those things we already have available to us Programs or spaces to educate people about environmental impacts (including how
•	Avoid long-shore drift/coastal erosion/flooding care for marine life Include something on using and enhancing on those things we already have available to us Programs or spaces to educate people about environmental impacts (including how fireworks and other activities impact environment)
*	Include something on using and enhancing on those things we already have available to us Programs or spaces to educate people about environmental impacts (including how

Northern Beaches Council: Local Strategic Planning Statement Engagement

36



Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



	Dark (assessfer also apply / places for sate to sup around)
•	Park/soccer/rugby, dog park (places for pets to run around)
•	Community run centre with yoga, info, etc.
۰	Life-saving club/ Duke of Ed
	Places to chill (e.g. Beaches, skate park)
	 People teaching each other (skaters)
	Vibrant location, buildings, and work
٠	Surfing
٠	Safety and freedom. Not too hectic and busy c Kids can go out by themselves
	Homes with enough space – "family members not living on top of each other"
	 Group questioned whether people really need big houses
	 Need space for services, not all residential
	Housing mix (e.g. Purpose built share houses)
	 Places like "the apartment on Friends" where they all live close to each other.
	Maintain low-medium density housing
	Local, walkable spaces to meet friends
	Places for recreational activities
22	© Good access
	 Near schools, libraries, parks
	Contrary view: denser housing to allow for bigger, useable green space between buildings
	Discussion: Mix is important. Maybe put high rise buildings in places where there is a
	greater demand to live whereas less populated areas can have lower density
	Diversity of people (including people earnings at different income levels)
	Affordable housing
	Smaller centres (e.g. for older people) with facilities/ amenities tailored to what they need
	Places for younger and older people to connect
	Design places that are flexible to future needs because demographics are constantly changing
iveat	ility – Priorities
	P6 should include equal medical treatment, promoting healthy lifestyle
-	P10 should include community workshops that are easy to join
	P11 – "want to be able to look back at the places I grew up in", including buildings and
	knowledge. Building on what we've had, to educate people on the heritage around them
	(including Aboriginal heritage)
	P14 – Don't want it to turn into big identical houses with no backyards. It should have
	housing mix with lots of greenery and different colours
	Consider flooding etc. for establishing growth areas
	Support affordable housing and must have options for downsizing

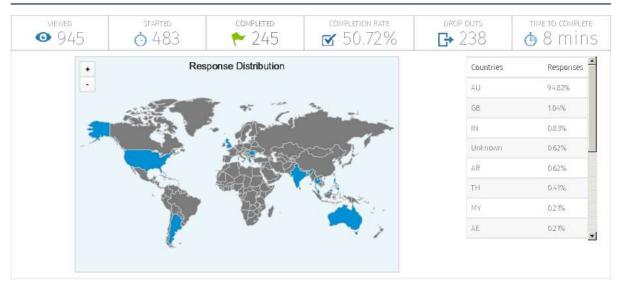
Northern Beaches Council: Local Strategic Planning Statement Engagement



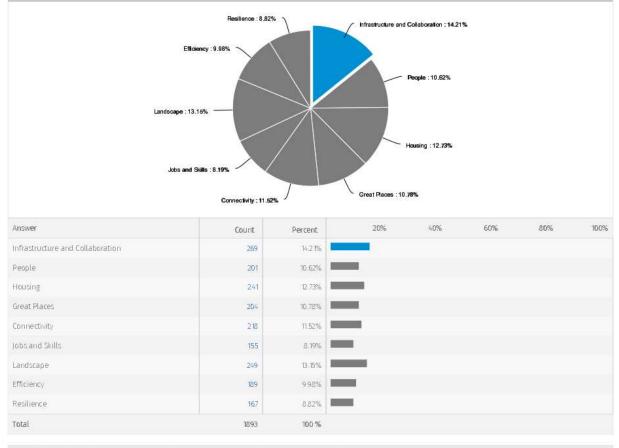
Community and Stakeholder Engagement Report Towards 2040 (Local Strategic Planning Statement – stages 3 of 4)



8.5 Appendix Five: Draft priorities survey results



Please select the themes that you are interested in reviewing. Note: To review all 39 draft priorities please select all nine themes. For a list of the draft priorities with a short description please click here.



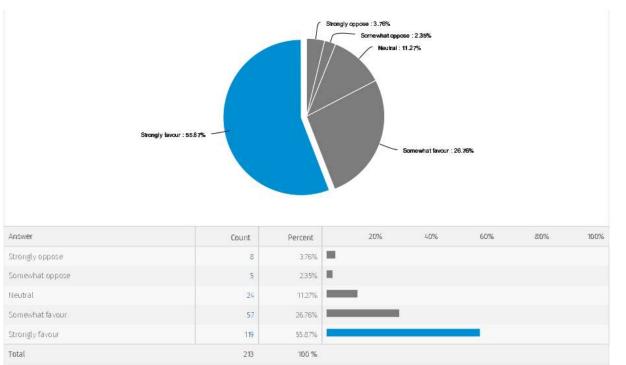
In 2040 the Northern Beaches will have... Click the '?' to see more information:

LSPS Draft Priorities - PRIMARY



	2. Su	a	D				
Powered by Al							
Question	Count	Score	Strongly oppose	Somewhat oppose	Neutral	l Somewhat favour	Strongly fav
1. Infrastructure delivered together with jobs and housing growth	220	3.47			_	_	
 Strong partnerships with state agencies, councils, the community and other stakeholders to achieve better outcomes for the community 	213	429					
	Average	3.87					
1. Infrastructure delivered together wit	h jobs and ho	usinggro	wth				
Strongly favou	:33.64%			Somewhat	oppose : 14.55%		
Strongly favou	: 33.64% Somewhat favour : 23.	185		Somewhat Neutral : 14.09%	аррозе : 14.55%		
		18%.	ent			50% 80	1% 10
Answer	Samewhat favour : 23.	Perc	ent 2	Neutral : 14.09%			P% 10
Answer Strongly oppose	Somewhat favour : 23.	Perc 14		Neutral : 14.09%			196 TE
Answer Strongly oppose Somewhat oppose	Somewhat invour : 23. Count 32	Perc 1/ 1/	.55%	Neutral : 14.09%			9% TC
Answer Strongly oppose Somewhat oppose Neutral	Somewhat favour : 23.	Perc 1/ 1/ 14	.55%	Neutral : 14.09%			96 10
Answer Strongly oppose Somewhat oppose Neutral Somewhat favour	Somewhat invour : 23. Count 32 31	Perc 14 14 14 25	.55%	Neutral : 14.09%			96 10
Inswer trongly oppose comewhat oppose leutral comewhat favour trongly favour iotal	Screewhat favour : 23. Count 32 32 31 51 74 220	Perc 14 14 22 33	1.55%	Neutral : 14.09% 10% 40%	5	60% 80	96 IC
Answer Image: Compare the second	Screewhat favour : 23. Count 32 32 31 51 74 220	Perc 14 14 22 33	1.55%	Neutral : 14.09% 10% 40%	5	60% 80	1% 11





Any further comments / suggestions on priorities 1 & 2 Any further comments / suggestions on priorities 1 & 2 Infrastructure should be compatible with the environment - this includes transport & schools 05/05/2019 1606585694 05/04/2019 1606588324 Ves, no 5G please. It will be discovered as NOT safe in next 3-5 years but impossible to back off it not STOPPED now. We NEED a tunnel, this is a long term vision and benefit to us all 05/04/2019 Infrastructure needs to be compatible with the Northern Beaches environment and avoid increased dependence on non-renewable resources. 1606585446 05/03/2019 1606584960 widen Narrabeen bridge to 6 lanes 05/03/2019 1606584904 Infrastructure is great & much needed & you would imagine that jobs would come with this however housing growth is a concern unless it is done with consideration to the area in terms of architecture etc., sustainably & aesthetically & not just handed over to greedy & uncaring developers No more housing growth north of Mona Vale. We need commercial growth to enable current population to live and work locally therefore reducing 05/03/2019 1606584812 congestion mot just here but throughout Sydney 05/03/2019 1606584709 No more housing growth, it's destroying our environment and quality of life. Standards of living are dropping because of over population 05/03/2019 1606582022 I am against further development of housing on the northern beaches. As a resident of 42 years, it has become a lot more difficult to get around the northern beaches in a timely matter, and more people will just make it worse. It is great to have partnerships with other agencies but that doesn't mean we have to agree with the other agencies just to keep the peace, ie: the state government might want more development but we should have the right to say "Bugger Off" 05/03/2019 1606581773 Improved Infrastructure should come first, then jobs and housing growth. 05/03/2019 1606580995 Community items need to be lower northern beaches not just deewhy and Mona vale stretch which seems to get 05/03/2019 1606580496 As long as the infrastructure is not car based The partnership with government is a genuine collaboration and council represents the genuine concerns of the community and demonstrates true leadership to tackle sustainable future for NB 05/03/2019 1606580055 I want the infrastructure, not the housing growth. 05/02/2019 1606578347 Population needs to be controlled with some regard to the area's carrying capacity. Also, as self driving cars are adopted, 3 lane roads with the middle as an over-taking lane will improve traffic flows without the massive devastation as can be seen on Mona Vale Road which looks as though it will be an 8 lane freeway. The ecological damage is criminal and shows how useless Council is in regards to sustainable anything. No housing growth should be allowed. With whom are the partnerships meant to be strong? Developers? Yeah. Right. 05/01/2019 1606562113 Infrastructure needs to be in place prior to further development. Not sure what jobs' is doing here as Council does not run a local command economy 05/01/2019 1606562005 Most of Sydney is full unless we decide we wish to lower our standard of living by decreasing open space, parks, increasing traffic and the like. Community voices need to be heard and the current hikes in rates and retention of parking fines (for example), show the council is not listening. Partnership means just that partnering with all 05/01/2019 1606556528 I would like to think we are all of a sudden starting to get infrastructure we have needed for years. Should be done by 2040. We have reached saturation point with housing. We bought here years ago for quality of life. We do not have lots of spare land. Housing needs to be carefully controlled. Getting state departments involved should be kept to a minimum. This should be controlled by our is local council. 1606555302 04/30/2019 Developer driven not community driven 04/30/2019 1606555294 I do not want to see an increase in population

LSPS Draft Priorities - PRIMARY



04/27/2019	1606541568	no tunnel to nth beaches, aim to get less people using cars and get better ferries.
04/27/2019	1606541480	1 Please don't support the Federal Government's Beach Tunnel link proposal - this will just encourage more car use. Already some families have 4 cars!
04/25/2019	1606520449	Item 1: The level of future housing growth which has been discussed recently in the media is of great concern to many residents.
04/25/2019	1606520567	yes we need greater diversity of housing
04/23/2019	1606514466	Housing growth should be carefully monitored and managed
04/22/2019	1606506307	Ensure all levels of government contribute and NBC does not waste resources on issues and factors best left to state or federal government
04/22/2019	1606506299	NSW state agencies and the council should investigate innovative funding (financing) models for infrastructure projects and community housing in order to fast-track infrastructure for Northern Beaches and to increase diversity of funding sources
04/22/2019	1606506158	1 do not believe the Northern Beaches should increase housing
04/22/2019	1606501766	Would like to see infrastructure and planning for food waste collection to kimbriki and reduced household waste. I would like more local jobs so I am not travelling so far for work (Greenwich) which requires me to put my kids into care for extended hours costing me more money.
04/22/2019	1606500643	Greater emphasis on NBC initiatives rather than State Govt
04/22/2019	1606500599	Emphases on NBC initiatives from consultation with Community
04/21/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
54/21/2019	1606500040	High rise buildings and destruction of trees / natural spaces must stop.
04/21/2019	1606499756	Through strong partnership with the Greater Sydney. Northern Beaches council should reject/oppose any further population growth. The current increases in housing in Warriewood Valley and Dee Why are more than the area can handle. Any further improvement in infrastructure over the next 20yrs will be necessary to support CURRENT housing.
04/21/2019	1606499623	We need public transport with density well planned around the nodes.
04/21/2019	1606499607	in question 2 - its a blanket question- my experiance of state agencies is that they are usually in a juxta position to the communites wishes- i would support the cummunity over state agencies always
04/20/2019	1606497692	state and local government and the community should be designing a place to live as a group to ensure the electorate has sufficient input into decisions that affect them. housing would be fine if local work places come along with them as well as schools and medical facilities
04/19/2019	1606494888	Jobs and housing growth should be a council area decision, not orders from state or federal.
04/19/2019	1606492914	Make public transport a priority
04/19/2019	1606491310	Why aggregate jobs and housing growths - this survey already looks dodgy. I'm in favour of Infrastructure delivered with jobs, but not housing growth.
04/19/2019	1606490266	Construct Bus Stop shelters
04/18/2019	1606489862	We are so far behind on infrastructure opposite current population that you can leave out housing growth Just get the infrastructure up to date before worrying about where to put the next house. And those on the job doing the infrastructure projects - they'd go much faster and be done much cheaper if your supervisors ensured each "worker" was actually doing the work they are being paid to do - instead of "any time I've driven pas a "work" site) finding a "team" of 9 persons with 2 doing something and 7 standing around watching or looking at their mobile phones!!!!
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resource to review these questions 20+ years ahead. Get more realistic in your planning.
04/18/2019	1606474654	I stand a gainst the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment. I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.
04/18/2019	1606489258	1) Not clearly explained - Suggests increased population which is not currently a good idea.2) Local Gov must rely of senior authorities;
04/18/2019	1606489228	Listen to what the residents actually want.
04/18/2019	1606489009	What is the plan to achieve infrastructure and collaboration? I believe continued engagement with the community is a must,
04/18/2019	1606488929	This must be done in an efficient and sustainable way. No need to consult anyone except experts who know what they are talking about. Too many times stakeholders have an agenda independent of the common good and a sustainable future. Involve people who know what they are talking about and can give the most sensible option.
04/18/2019	1606485160	Why combine infrastructure with housing growth? Looks like you structured the question to skew the results.
04/18/2019	1606484459	Northern beaches and the Forest area is struggling with massive congestion. We dont need more development
14/18/2019	1606483306	Overcrowding overdevelopment more pollution more noise more rack in stack unit buildings - miserable families/voters!
04/18/2019	1606483261	Do not turn the NB into the Gold Coast
04/18/2019	1606483187	wary of state agencies
04/17/2019	1606482921	Transport infrastructure should focus on public transport over roads. For example, the Northern Beaches Tunnel would be better as an extension of the metro rail line than a road. How does a road assist commuters? They still need to park when they reach their destination.
04/17/2019	1606482975	create subsidised or free co-working spaces for startups that will generate local jobs
	1606482396	Transport infrastructure in particular should be developed with the understanding that the future of the Northern Beaches transport is centred

LSPS Draft Priorities - PRIMARY

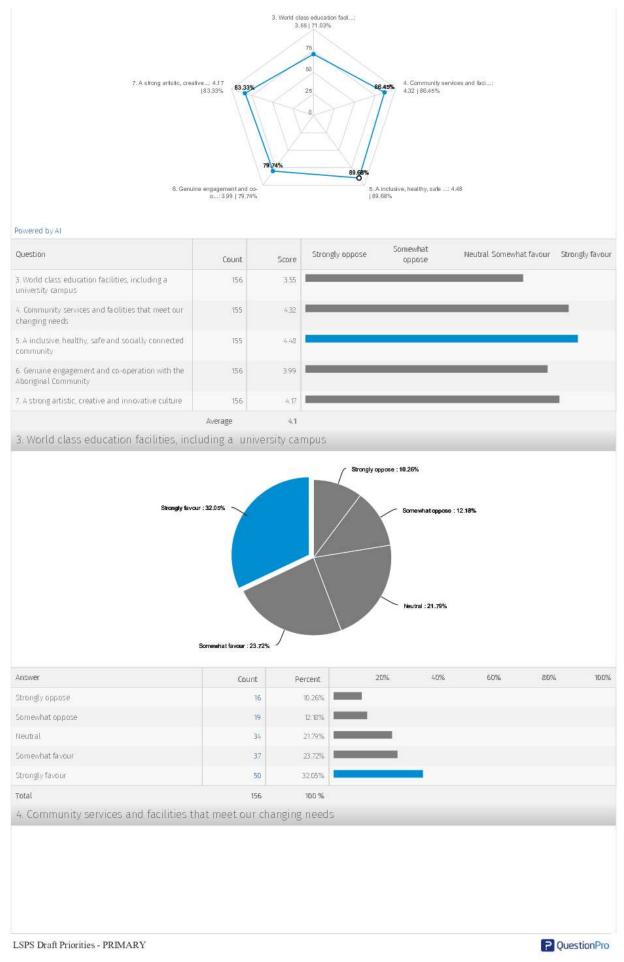


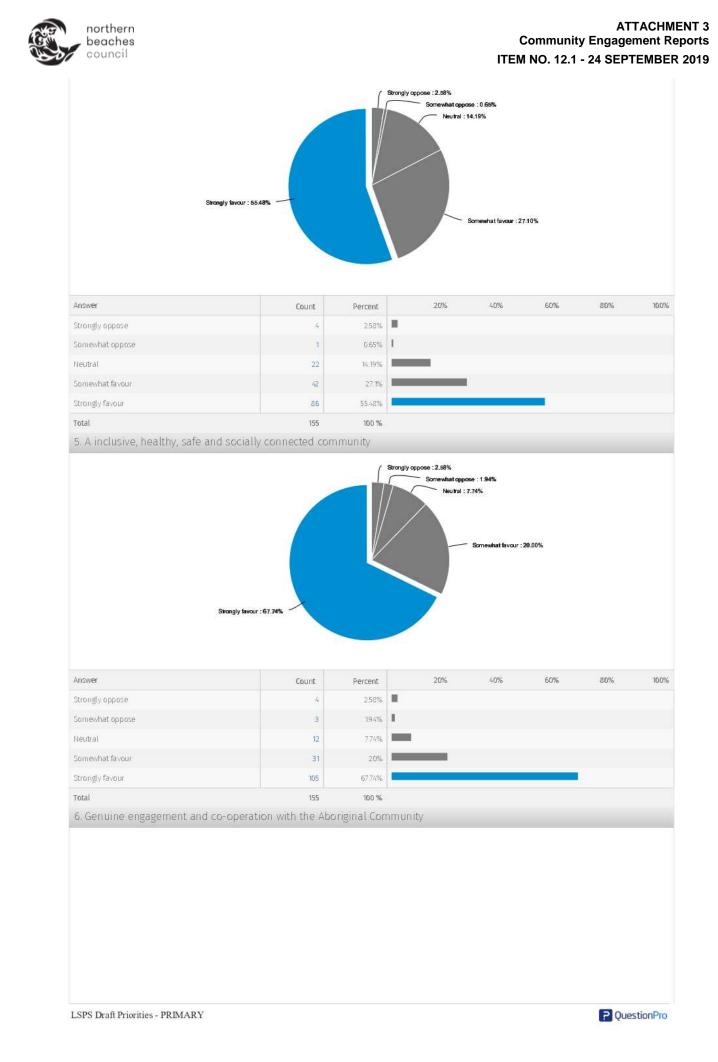
04/17/2019	1606482354	Infrastructure delivered with jobs and growth sounds like code for overdevelopment, about which I think we must be very careful. This is a fragile and quite honestly limited area and there is a limit to how much growth we can handle. I do not trust that resource limitations are considered when developers are pushing growth.
04/17/2019	1606478044	No room or need for housing growth
04/17/2019	1606476501	Infrastructure must have not only the community in mind, but the environment as well by focussing on boosting public transport and reducing the number of single passenger vehicles on the roads on the Northern Beaches
04/16/2019	1606475275	the Northern Beaches does NOT need housing growth, we are a water-locked community with limited road access and the low density appeal of the current level of housing needs to be preserved. ALL of Sydney does not need to support housing growth - and Northern Beaches Council should strongly resist any further pressure from Greater Sydney to provide more housing. Current increases in Warriewood Valley and Dee Why is more than we can currently handle even with improvements to infrastructure
04/16/2019	1606474824	You can't have housing growth when the new Government is closing Hospital that where necessary and are still necessary
04/16/2019	1606474712	integrated, functional, fluid infrastructure is key to facilitating positive growth
04/16/2019	1606474664	many jobs can be created via a University campus eg MQ Uni model, reach goals faster when collaborate
04/16/2019	1606474588	I strongly oppose the implementation of 5G due to the health and environmental risk especially with no real testing. Please do NOT implement this here. Please I am begging you from my heart, think of the health of those that live here, including you.
04/16/2019	1606474525	1 am strongly opposed to the proposed rollout of 5G technology in view of the serious health concerns around millimeter vave technology.
04/16/2019	1606474465	Affordable housing and green space for residents should be a priority
04/16/2019	1606474340	Up to date infrastructure has lagged way behind housing , the two need to be in concert or the Northern Beaches will become unliveable
04/16/2019	1606474316	I believe the current infrastructure for the NB population is insufficient and inefficient. I oppose housing/population growth until infrastructure is in place to support growth - not the other way around. Partnerships should be formed and strengthened when the priority is the local community gaining better outcomes, not losing them.
04/16/2019	1606474251	I object to new telecommunications infrastructure for 5G in our Communities and I find it outrageous that local state and federal government has little regulation and control
04/16/2019	1606474183	We do not need or want any further housing or population growth on the northern beaches. The current rate of the area's environmental destruction and geographic constraints means the area cannot cope with any more development. We do not have the infrastructure to cope with our current population so no thought of further growth should be considered.
04/16/2019	1606474223	No , absolutely no, increase in density without good transport
04/16/2019	1606469456	Communications infrastructure really concerns me. Labsolutely oppose the rollout of a 5G network. Ldo not want to have 5G at all or any infrastructure in preparation for 5G, until exhaustive research is done and is accepted by all relevant health authorities so we are guaranteed that it is safe. Until that day, NO 5G.
04/16/2019	1606469419	I oppose 5G and do not want to see that infrastructure rolled out in our communities.
04/16/2019	1606468938	PLEASE STOP 5G ON THE NORTHERN BEACHSS IT IS DANGEROUSE AND WILL GIVE US BRAIN TUMORS AND CANCER FROM THE HIGH RADIATION. You are in a position of power and you can save us so please, just google how dangerous it is.
04/16/2019	1606468509	Growth should deliver better more sustainable places. Growth should not increase travel by private cars. The northern beaches should not be part of the plan for 2040.
04/16/2019	1606468314	I don't want further housing growth the community should be consulted more for better outcomes for the community
04/16/2019	1606467823	Transport (ie NB tunnel and east west b line) Further development of Dee Why and Frenchs Forest as medium to high residential with commercial. Industrial land in Brookvale protected
04/16/2019	1606467676	More local issues and less time wasted on State and Commonwealth issues ,eg footpaths are Council business, housing and jobs should be left to State and Commonwealth, less jobs in council administration on non council issues.
04/16/2019	1606467677	Development of sustainable low and medium density housing, incorporating renewable energy and energy management
04/16/2019	1606467575	footpaths
04/16/2019	1606467438	are these appropriate questions - why not ask if we are in favour of motherhood also?
04/16/2019	1606467391	Realistic estimates of what infrastructure can be afforded and delivered. No empty promises
04/16/2019	1606467087	The most pressing infrastructure issues are transport (public especially) and management of housing density.
04/16/2019	1606467068	Very woolly statements. Of course these sound like a good idea, but not to the detriment of our environment and energy use. There needs to be a huge focus on renewable energy/recycling/mindful development.
04/16/2019	1606465839	Infrastructure is constantly lacking
04/16/2019	1606465492	The infrastructure needs to precede the housing. If the Satate & Fedeeral don't fund the infrastructure first, no more development.
04/01/2019	1606340073	

In 2040 the Northern Beaches will have... Click the '?' to see more information:

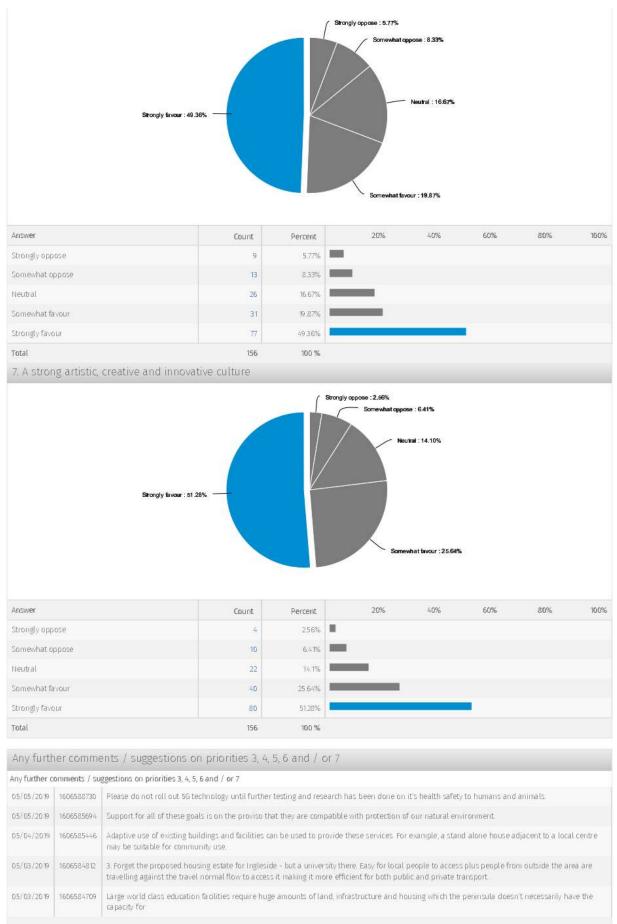
LSPS Draft Priorities - PRIMARY











LSPS Draft Priorities - PRIMARY



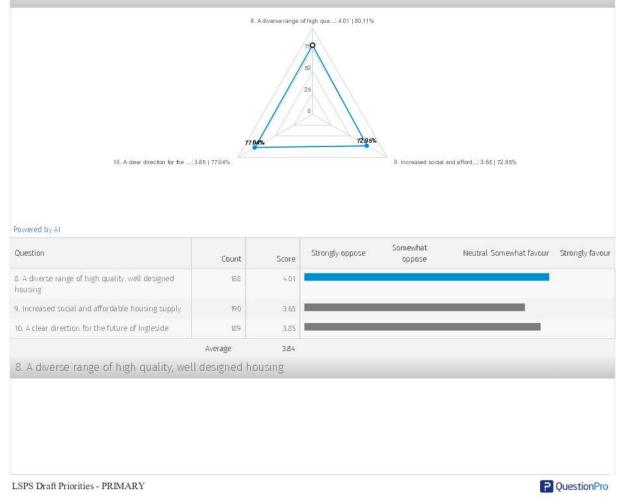
05/03/2019	1606581773	#5 - I wonder what these nice words mean in practice? At the moment I feel quite the opposite.
05/03/2019	1606580995	Stop population growth until a train system in place from northern beaches
05/03/2019	1606580496	Connection does not require road based tunnel
05/02/2019	1606578532	We should not intrude into private or responsibilities of other levels of government
05/62/2019	1606578347	3. Not a good idea as all it does is inflate the population. 4. Without ecological considerations and the preservation of now threatened bushland, who needs facilities? I presume they are more high water use sporting fields that are rarely used but off-limits to dog owners. Bugger that, 5. Waffle, 6. Where are these Aborigines? Is this just politi-speak and lip-service to the disaster of British invasion of the Sydney region? Council should be preserving the food and medicinal resources as well as the land management practices of the clans who once lived here, not setting some school projects as Council priorities. Spare me. 7. Really? Lets focus on arty-farty stuff instead of the real issues that matter. Why is this a priority????
05/01/2019	1606562113	Need to ensure the existing TAFE college is also world class. Genuine engagement and cooperation with the Aboriginal community needs to be rewritten so that it reflects the landscape which is the key for understanding and appreciating 55,000° years of guardianship by our First People. As it stands - it feels like a motherhood statement which will go nowhere.
04/30/2019	1606555302	Generic to any community - not specific to NB"motherhood statements."
04/27/2019	1606541480	a university sounds glamorous, but it just means more people putting pressure on an already delicate environment. There are plenty of universities in Sydney, and furthermore, more and more people are studying online, not in bricks and mortar universities.
04/25/2019	1606520449	Priority 3: A great deal could be done to improve and update our existing government primary and secondary schools on the Northern Beaches. I would strongly question the need for a sprawling university campus. Most residents strongly opposed the environmental destruction which resulted from the controversial redevelopment and enlargement of Manly Vale P.S. Where would there be sufficient space for the large amount of land needed for a sprawling university campus? Improved public transport links to the many existing universities, in particular light rail, would be a preferable option. Priority 6. Genuine engagement is a two way street. The Aboriginal Land Council has shown little understanding of the reasons for their over sized and inappropriate development at Ingleside being rejected.
04/22/2019	1606506287	These are all important to me and my community. I thoroughly support a strong creative and innovative culture
04/22/2019	1606501461	P3 - Why? If every council in the Sydney Basin had the same priority, it would become a nonsense. Universities should be research focused, selective and concentrated to facilitate high standards. Better to encourage the establishment of vocational education institutions - far greater need. P6 - Why should the emphasis be on the scarit indigenous population at the expense of other cultural minorities?
04/21/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL. IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
04/21/2019	1606499756	The population of the Northern Beaches would support and benefit from a university/TAFE campus - not only for education but for local employment opportunities it provides as well.
04/20/2019	1606497692	developing a fully functioning self supporting community with all of the necessary facilities would reduce the need to commute to other centres where they currently exist and reduce dependence on cars
04/18/2019	1606489862	No need for local Uni campus as with an East - West connected public transport system, Macquarie Uni is more than close enough and established. But restoring Seaforth TAFE (or resetting it to Mona Vale) and upgrading Brookvale to world class would definitely be good. Do not support the winding down of Mona Vale hospital. That is a Brad Hazzard / Gladys disaster. Acute services need to be closer to the northern tip of the peninsula than just having French's Forest hospital.
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resources to review these questions 20* years ahead. Get more realistic in your planning.
04/18/2019	1606474654	I stand against the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.
04/18/2019	1606489258	3) Great to have a University. 4) With greater services & facilities comes greater costs:5) A safer healthier community is without question 6) The indigenous community should continue to engage with the whole community 7) The Arts is a must for all communities.
04/18/2019	1606489228	All this fancy stuff and yet you bulldoze bushland and destroy our sports ovals with synthetic grass
04/18/2019	1606488926	Keeping our community safe is really important to our lifestyle in this area There already is a university at Manly the ICMS. Use the underused bowling clubs as social/community gathering places for activities to reduce loneliness.
04/18/2019	1606488916	Protect Brookvale TAFE
04/18/2019	1606483306	Only models of the above designs displayed at all Libraries for access to all members of the community would be fair and inclusive. Current community consultation is dismissive, deliberately inconvenient times & days Le b4 public/school holidays, deadlines too short & key information is usually omitted vague or buried on page 3451 FIX IT!!
04/18/2019	1606483261	Time to start catering to the people at the beginning of their lives not those at the end. (Not suggesting we should treat them poorly, they should just have less sway when it comes to public planning)
04/17/2019	1606482407	3. this is extremely important - a uni campus and a specialist College like the SA lazz College set up by James Morrison. WE could have had it here! 6 I see little evidence of this happening at the moment but there many opportunities - focus on maintaining ancient sites, incorporation of people into many aspects of our life, etc.
04/17/2019	1606482396	Spreading the awareness of our unique local history is crucial to engaging the community
04/17/2019	1606482354	These are all very important things and I hope that we can achieve them. I think a university would be good but only within the context of our community, so I would support not a new university but perhaps a brand of an existing university focusing on marine biology and things like that. Just as important as a university are TAFE, high schools and primary schools.
04/17/2019	1606476021	The University Campus could be a "virtual" one - a meeting place for students and on line lectures.
04/16/2019	1606475143	Give us back a public hospital.

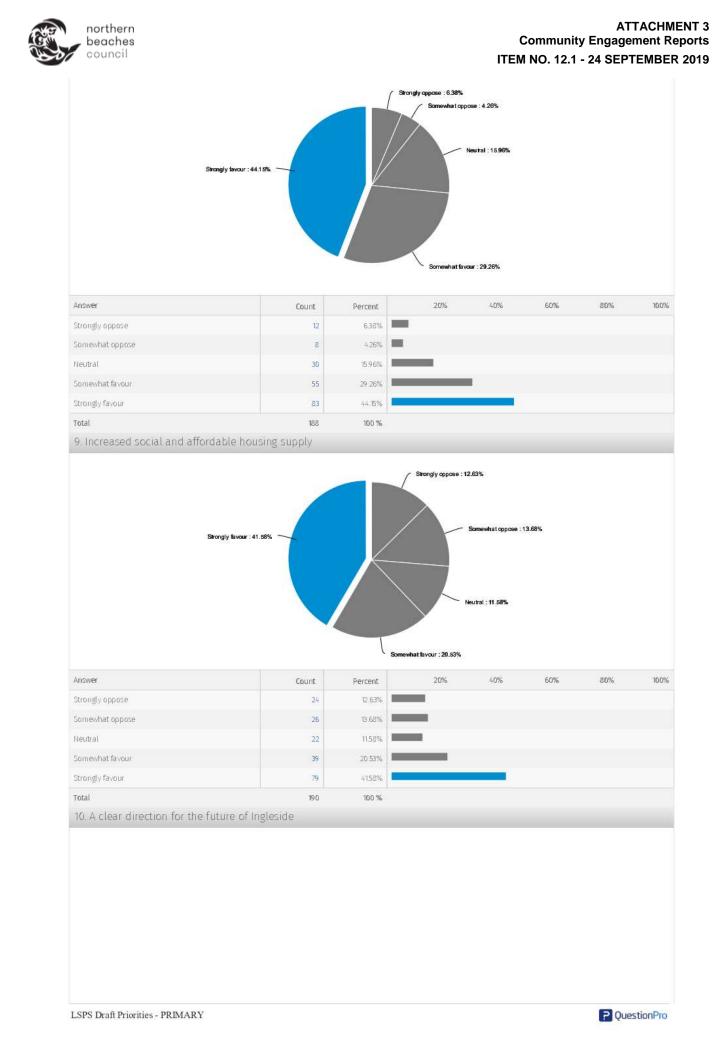
LSPS Draft Priorities - PRIMARY



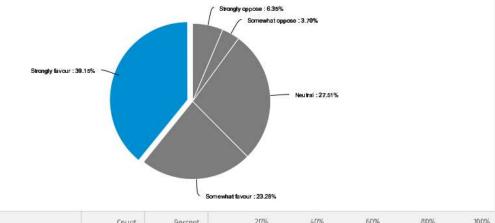
04/16/2019	1606474583	MLALC has demonstrated a "attitude to engagement with the local community. The debacle at Bantry Bay and their ridiculous subdivision attempt at Belrose shows they're only interested in the money and care nothing for being custodians of the natural environment or working with the community.
04/16/2019	1606474525	I strongly favour world-class education and strongly oppose us having a university. We do not have space for this and we have enough universities close by, I also strongly opposed to the proposed rollout of any 5G technology in view of the serious health concerns around millimetre wave technology. This is not a favourable health outcome.
04/16/2019	1606474465	Council should not make any decisions in relation to development or the landscape without the approval of the Aboriginal community
04/16/2019	1606474251	I strongly oppose telecommunications innovations and connectivities in our community. I do not believe in the internet of all things, as I believe there are world wide scientific studies showing health risks of the new technology of 5G. I believe the telcos are cashing in on billions of revenue at our communities expense
04/16/2019	1606474223	This survey is rubbish. It only allows comment in line with council objectives. There is NO possibility of a world class university nor any land on which to build one. It's a joke
04/16/2019	1606469456	I'm concerned about 5G and do NOT want it in our community. Being "connected" is not as important as being healthy and until there is bulletproof evidence that it's safe, NOT having 5G is my most important priority.
04/16/2019	1606468314	I want a strong healthy and safe community but I don't want the health dangers of a 5G in this community
04/16/2019	1606468509	Universities require efficient publics transport not a Road tunnel Lincreased road capacity will have a negative impact on communities creating physical barriers and make walking and cycling more difficult
04/16/2019	1606468003	Community facilities should include capacity for bunals and memorials. We have an aging population and our current cemeteries will run out of space for new bunals within the next 10 - 15 years. Our local population includes cultural and religious groups who don't practice cremation including Serbian Orthodox and other Orthodox Christian groups, Baha'i and also some Catholics including Croatian and Italian Catholics.
04/16/2019	1606467823	NB already has ICMS in Manly. More tertiary education providers not necessary. It's not far to the city. We need more sports fields such as soccer pitches
04/16/2019	1606467391	University must be serviced by good public transport
04/16/2019	1606467087	Responsibility for engagement with the indigenous community rests with them equally with the balance of the community.
04/16/2019	1606467068	Again, mostly wooly sweeping general statements, but no mention of the extent of impact these developments will have
04/16/2019	1606465839	Aboriginals are Australia, we are all the same. Why should one race be singled out? There no no need for a university
04/01/2019	1606340073	

In 2040 the Northern Beaches will have... Click the '?' to see more information:









Answer	Count	Percent	20%	40%	60%	80%	100%
Strongly oppose	12	6.35%	-				
Somewhat oppose	7	3,7%					
Neutral	52	27.5 1%		l.			
Somewhat favour	44	23.28%					
Strongly favour	74	39.15%	2	1.1			
Total	189	100 %					

Any further comments / suggestions on priorities 8, 9 and / or 10 $\,$

Any further co	omments / su	ggestions on priorities 8, 9 and / or 10
05/05/2019	1606588896	I do not agree with the "high density living" approach that is being rolled out. There are too many high level unit blocks going up. Deewhy is a mess and far too busy. It would be a shame if Narrabeen and mona vale turned into the same high density living areas.
05/05/2019	1606585694	I do not support some of the policies to increase social and affordable housing. This includes allowing increased development as a trade off for a percentage of affordable housing. The consequence is over development that is out of character with local areas. Ingleside is the only rural land in Pittwater and is located between National Parks and bushland reserves. The rural area, bushland and waterways should be protected for future generations.
05/04/2019	1606588029	Re 10; twenty years to have a 'dear direction for the future' is too long; should have it now. Re 8; would like to see an emphasis on sustainable housing ie, passive design, renewable energy and water efficiency
05/04/2019	1606585446	Ingleside is the only rural area in Pittwater. I would like to see a clear direction that protects the rural land use and environmental values, including bushland and waterways.
05/03/2019	1606584904	As long as the consideration is for the community with an eye to sustainability and architecture not horrible eyesores as seen in areas of Newport & particularly Dee Why.
05/03/2019	1606584812	More public housing for low income earners and more focus on Eco friendly housing - ensure that all new buildings (both residential and commercial) comply with the latest Eco measures such as solar, water tanks, double glazed windows etc as well as materials used in construction.
05/03/2019	1606581773	#8 It sounds like a paradox between the title and the explanation
05/03/2019	1606580995	Housing growth needs to stop until we sort out future
05/03/2019	1606580055	Don't develop Ingleside. Minimise medium & high density housing. Develop some public housing.
05/02/2019	1606578532	Affordable housing is the responsibility of state and federal govt.
05/01/2019	1606562113	I would add 'sustainable" to the adjectives describing housing goals
05/01/2019	1606562005	Again why more housingbut that said the preponderance of McMansions all over Sydney and the Northern Beaches smacks of one-upmanship. Why do houses need more than one bathroom and toilet? What a complete waste of resources to add more. Why aren't solar passive designs now completely mandatory? Why now legal imperative to have solar panels, solar hot water, water collection etc. etc.
05/01/2019	1606556528	Could all new unit developments have 1 unit allotted for affordable housing.
04/30/2019	1606555302	10.No development of ingleside
04/29/2019	1606547635	9 must be treated with high priority.
04/27/2019	1606541568	sustainable growth in nth beaches is key aligned to infrastructure and services. not just mass numbers and no support to these numbers.
04/27/2019	1606541480	9. If "Affordable" housing is a euphemism for housing commission dwellings, their location needs to be very carefully considered, because the presence of these types of dwellings can quickly erode the community fabric of an area.
04/25/2019	1606520449	Priority 9. Affordable housing must be coupled with legislation that considers the need for comment and approval from council and residents as well as the inclusion of ample off street parking.
04/25/2019	1606520567	we need to allow further development options outside of boarding houses and over 55s! Why are so many large blocks of land close to services and public transport not able to even be developed with low rise apartments, townhouses, subdivided or dual occupancy?

LSPS Draft Priorities - PRIMARY



04/22/2019	1606506615	I support quality housing (many new units are not well built). However, I don't believe in too many more unit blocks going up. The Northen Beaches cannot cope with too much more population growth.				
04/22/2019	1606506299	8 the area needs effective planning solutions to increase supply of well-designed medium density housing in suitable areas 9 the council should investigate options to invest in social housing directly (e.g. invest development contributions into council-owned units in off-the-plan projects) via a council&community-governed dedicated trust / investment company. Those affordable units can be managed and rented out via non-for-profit community housing organisations.				
04/22/2019	1606506268	a mix of housing and demographics is healthy for everyone.				
04/22/2019	1606501461	P8 - Who decides? The past 52 years, during my residence in NB does not give one any confidence that 'high quality well designed housing' will eventuate. Unless something radical is proposed, such as enlightened architectural oversight, it will be a race to the bottom to mass-produce low cost outcomes at the expense of aesthetics. Look at some of the beach suburbs, such as Dee Why, the Council heartland.				
04/22/2019	1606506158	I do not agree with the push for high density affordable housing. Keep Northern Beaches low density				
04/22/2019	1606500643	Emphasis on less high rise, aesthetic design and larger apartments for downsizers				
04/21/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL. IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.				
04/21/2019	1606499623	Medium density models that cater to families- eg apartments with 4 bedrooms, big terraces, rumpus rooms.				
04/19/2019	1606494888	'Affordable housing' is a euphemism for high and medium density housing that is not wanted on the Northern Beaches				
04/19/2019	1606492914	No more high rise or hi GG to medium density housing without public transport solutions, permanent green space and recreation facilities. More lower foot print schools and not near sensitive bushland.				
04/18/2019	1606489862	You don't need a 20 year plan for Ingleside. It's been a mess for over 40 years now. Prioritise it to 2025 to have it finally agreed with both NSW Planning and Council on zoning, infrastructure and subdividing.				
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resources to review these questions 20+ years ahead. Get more realistic in your planning.				
04/18/2019	1606489228	Don't bulldoze Ingleside, and stop the over development				
04/18/2019	1606489053	There are too many unit blocks in the area. It takes away from the natural feel of the area. No more housing				
04/18/2019	1606489009	Ingleside needs to be sorted now, not by 2040. The land is there but the infrastructure is not. Fix the infrastructure and open up the land.				
04/18/2019	1606488929	Affordable housing developed along sustainable principles is key to not only our council but he world!				
04/18/2019	1606488916	Policies for energy efficient, sustainable housing design. Resources and advice for energy efficiency retrofitting				
04/18/2019	1606485160	Don't develop ingleside!				
04/18/2019	1606483261	Affordable housing is essential in any community- does it need to have ocean views?				
04/17/2019	1606482396	Ingleside's development should progress in conjunction with discernible improvements in public transport infrastructure, to ensure the roads are ready for the sudden increase in commuting population.				
04/17/2019	1606482382	Unless Council prioritises affordable and community housing options plus sympathetic density increases such as dual occupancy, the Beaches will exclude many younger people who have grown up as locals but will be forced to leave.				
04/17/2019	1606482354	Once again, there is a limit to how much new housing we can accomodate. There probably is too much holiday housing available with Airbnb which could be housing for Northern Beaches residents. MiniChatswood with high rises is not where we want to be going. On the other hand, there is probably unused industrial land in Brookvale that could be converted to mixed using, diverse affordable housing, such as low rise or terraces. The Ingleside plan sounds incomplete and unsustainable and I hope is not taken forward unless it is planned to be sustainable, fully resourced and within the context of our community.				
04/17/2019	1606476501	Ingleside should remain as much natural environment as possible, and its development should progress in conjunction with transport infrastructure improvements to ensure public transport is not overwhelmed by the dramatic increases in population growth.				
04/16/2019	1606474664	Ingleside development stopped due to CC impacts bushfire risks, unsure why this is here?				
04/16/2019	1606474525	With all of the housing and rollout of the hard wired NBN, I am strongly opposed to the proposed rollout of any 5G technology in view of the serious health concerns around millimetre wave technology. This is not a favourable health outcome. Other cities are halting the rollout due to health concerns and I do not see what we are looking to introduce it in Sydney.				
04/16/2019	1606474335	8. Would be amazing if newly designed housing were Greenstar certified				
04/16/2019	1606474316	Population growth should be strongly monitored and controlled to give all residents an exceptional living environment. Affordable housing would benefit those brought up in the area and would like to stay in the area. Most properties are out of reach for a young person.				
04/16/2019	1606474183	Re 9 We do not need or want any more houses on NB. There are currently thousands of granny flats being built (ie affordable housing) with accompanying cars for each flat (usually with no off street parking included in the build) and hundreds of trees being felled for these flats. These are not factored in to Council's figures re "affordable housing" and should be. Re 10. The only 'clear direction' we need re Ingleside is that it is left as a natural bush area with NO development of any sort. It is in a fire prone area and so the correct decision was made to not go ahead with the Ingleside development, so this decision should be the final one. The community and native fauna need this area as native bushland. We do not want it developed in any way. The question is flawed as it gives no options as to what 'future' we all might envisage.				
04/16/2019	1606474251	The ingleside development should have adequate community infrastructure prior to homes being constructed				
04/16/2019	1606469456	The ingleside development should have a dequate community infrastructure prior to homes being constructed Let's not flood the area with density. It's losing its character as it is, let's preserve what's left of this beautiful natural area. We need to link SYDNEY to other centres like the central coast or south coast so people can commute to jobs in Sydney via proper high speed rail right to the centre rather than the slow ride into Sydney that it is now. Then we don't spoil the northern beaches with tonnes of high density living because people can live further away and still travel to Sydney for work in a short time. And Sydney will retain character. And greater population in other regional areas will over time create more economic opportunities outside Sydney rather than everyonic crowding into our suburbs and putting them under strain and choked with traffic. Our focus should be creating infrastructure to link areas outside Sydney to our Centre so we can continue living a high quality life and not feel overcrowding spoils what was once a beautiful area.				

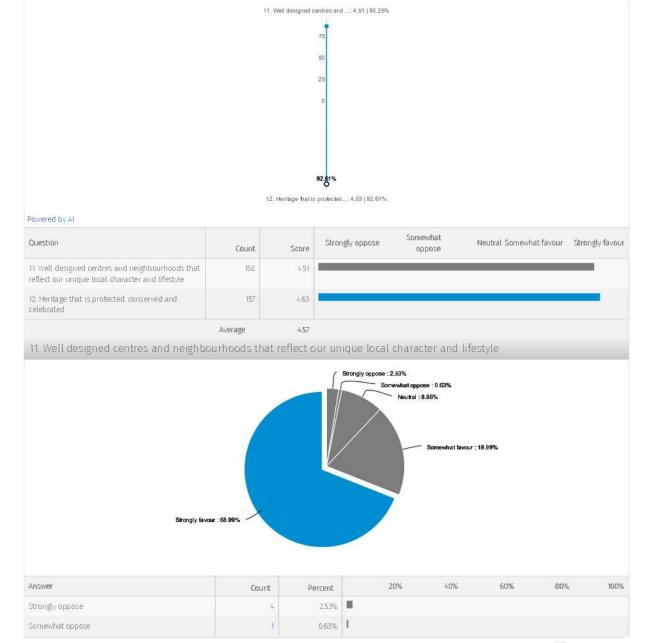
LSPS Draft Priorities - PRIMARY



ATTACHMENT 3 Community Engagement Reports ITEM NO. 12.1 - 24 SEPTEMBER 2019

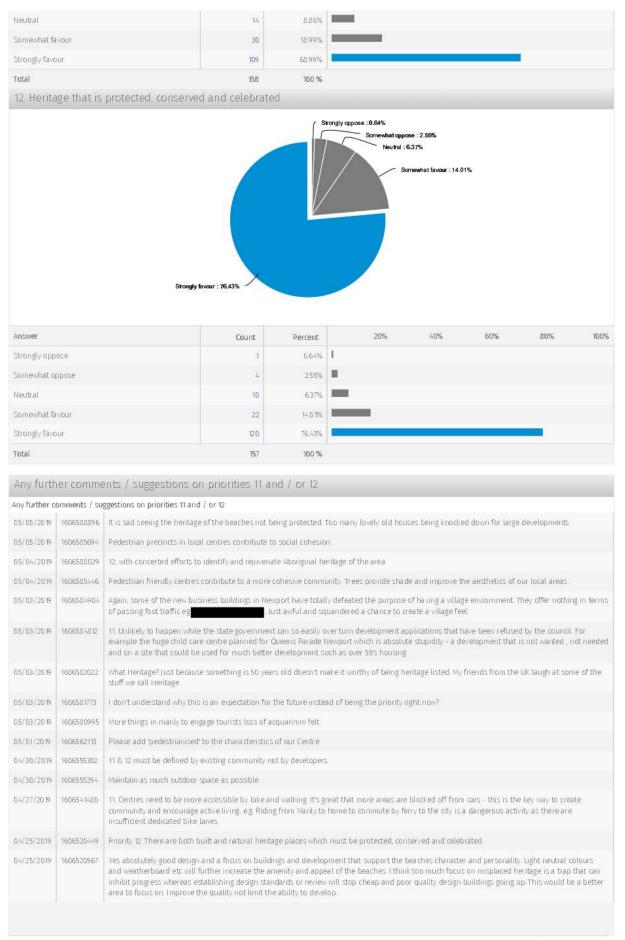
04/16/2019	1606465839	Leave ingleside as it is					
04/16/2019	1606466494	No housing in Ingleside.					
04/16/2019	1606467068	At risk of repeating myself, of course we want 'well designed' housing, but there is no mention of what that is. We don't want resource intensive, wasteful, energy inefficient housing, that has 'designer' touches and Miele appliances!					
04/16/2019	1606467087	Ingleside development MUST consider the huge fire risk. It must therefore be skewed heavily towards low density hosuing with large protective buffer zones (parkland, sports fields for example) between buildings and the national parks.					
04/16/2019	1606467391	Infill development must be encouraged and facilitated, rather than areas with large concentrations of any particular type of housing. There needs to be a mix and a balance.					
04/16/2019	1606467438	Keep Ingleside rural thanks. Again, more motherhood questions.					
04/16/2019	1606467823	Greater development of Frenchs Forest, Beacon Hill, Forestville, manly Vale especially high rise apartments in conjunction with the NB tunnel and east west B line					
04/16/2019	1606468509	Ingle side does not have adequate public transport or access to services. Other more central placed should be developed first					
04/16/2019	1606468314	There's already enough housing density here I don't want any more housing built - people have moved and live in this area for a reason it's changing beyond recognition and people don't like it - people i talk to want to move away because it's getting overcrowded and busy					

In 2040 the Northern Beaches will have... Click the '?' to see more information:



LSPS Draft Priorities - PRIMARY





LSPS Draft Priorities - PRIMARY

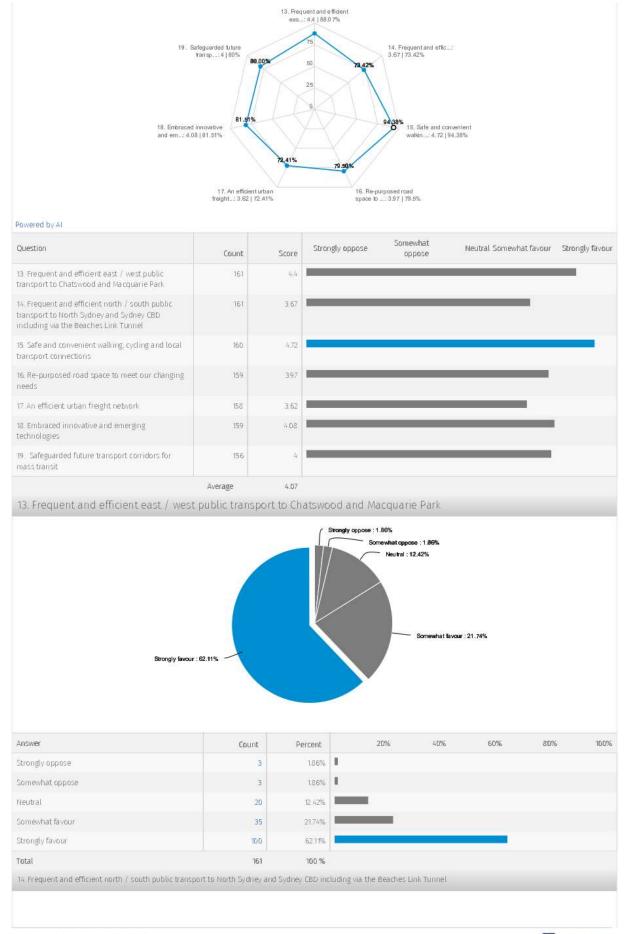


04/22/2019	1606506294	We must at all costs protect our natural and Aboriginal heritage to protect it from overdevelopment. For example Manly Dam needs to be heritage listed asap and remnant bushland that contains rock art sites incorporated into the park as a priority. No other major city in Australia can offer such a place so close to the CBD.
04/22/2019	1606506158	Biodiversity and environmental issues need to be protected
04/22/2019	1606501766	I would like to see more dedicated walking tracks (like Narrabeen lake) that families can enjoy. And established and we'll sign posted bush tracks. I would also like a dog beach somewhere between manly and Bayview (even if it is only at restricted times)
04/21/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
64/21/2619	1606499756	Low density and restoration of current centres & unique neighbourhoods will enhance the character that most residents moved to the beaches for I would strongly oppose any development of centres north of Dee Why that increase traffic/people &/or diminish the "small town" feel that residents cherish.
04/21/2019	1606499623	Walkable town centres accessible by public transport, bike lanes and ride share.
04/21/2019	1606499607	we need to preserve the greenspaces at all cost
04/20/2019	1606497692	the northern beaches has destroyed much of its heritage so maintaining what little is left is important
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resources to review these questions 20+ years ahead. Get more realistic in your planning.
04/18/2019	1606489258	11) Our unique character is to be Australian our lifestyle relates to the Sea I2) Does not seem that past heritage listings always survive.
04/18/2019	1606489228	Keep the bushland! And our ovals, that is our unique character.
04/18/2019	1606483306	Neighbourhoods should be peaceful practical and naturally aesthetic. Bushland needs to be protected - reduces noise/air pollution, creates less heat islands retains Aussie character!
04/17/2019	1606482396	Centre's should be fitted with ample parking options and public transport connectivity, something that should be binded to all future public and private development applications in the area, particularly in high density areas such as Manly, Dee Why and Mona Vale. These developments must also reflect an understanding that ample green space and canopy cover is vital to retaining the beauty of our build landscapes.
04/17/2019	1606482354	Yes extremely important for many reasons. It is important to have centres which are walkable and accessible to limit need for cars and to contribute to the local lifestyle. Heritage is very important for history, amenity, diversity.
04/17/2019	1606476501	An increased awareness of the history of the local area should be pursued, to make the community aware of and passionate to protect the environment and culture we hold in Sydney's north.
04/17/2019	1606476021	we have to define our "unique local character" - maybe there are several ideas on this
04/16/2019	1606475275	Continue to protect our heritage sights and level of low density housing. Our unique character & lifestyle can only be maintained by preventing further populations growth and housing growth
04/16/2019	1606474712	the strive for the new, shouldn't always be at the expense of the old. And there needs to continue to be room for small local business to thrive/survive as places renew, not to simply be replaced by chains & franchises (eg Dee Why town centre)
04/16/2019	1606474664	strong emphasis natural environment - this is why NB is so highly valued
04/16/2019	1606474525	A well-designed neighbourhood should be safe. The use of 56 technology is not a well-designed neighbourhood, it is a poorly designed neighbourhood as it would be using untested and what is regarded as unsafe3 technologies.
04/16/2019	1606474335	11. Would be a mazing if newly designed center buildings were Greenstar certified
04/16/2019	1606474316	Community based social spaces are a must to keep the NB a desired and cohesive place to live.
04/16/2019	1606474183	We do not want a one size fits all policy re LEPs. The NB has many diverse suburbs that all have completely different character. The unique character and heritage of each particular area must be taken into account and conserved for the future. Most important.
04/16/2019	1606474251	I oppose the use of 5G technology being used in our public spaces like shopping centres schools and parks etc
04/16/2019	1606469456	Keeping the character of the area is paramount. Not overcrowding the area is part of retaining the character and lifestyle. Reduce all the building works and roads construction.
04/16/2019	1606468314	we need to preserve our environment at all costs. Centres like mona vale should have good amenities like restaurants/cafes
04/16/2019	1606468509	Increase in traffic will have a negative impact on centres
04/16/2019	1606467391	There is some capacity in the existing main centres for higher and denser development, providing its well designed, with good access to public transport and has excellent approach to public space
04/16/2019	1606467087	Main roads mus go around, not through, major centres. This means moving the effective centre of Dee Why (for one) several blocks away from Pittwater Rd. Ditto Narrabeen and Newport.
04/16/2019	1606466174	You need to maintain casual beachyness not perfectly paved pathways.

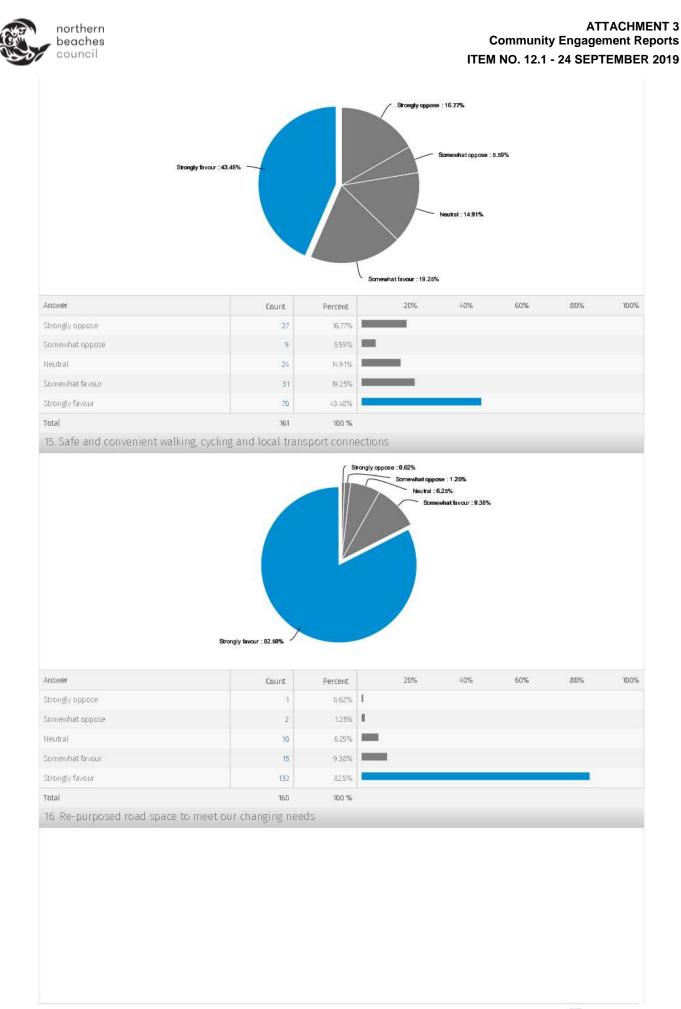
In 2040 the Northern Beaches will have... Click the '?' to see more information:

LSPS Draft Priorities - PRIMARY

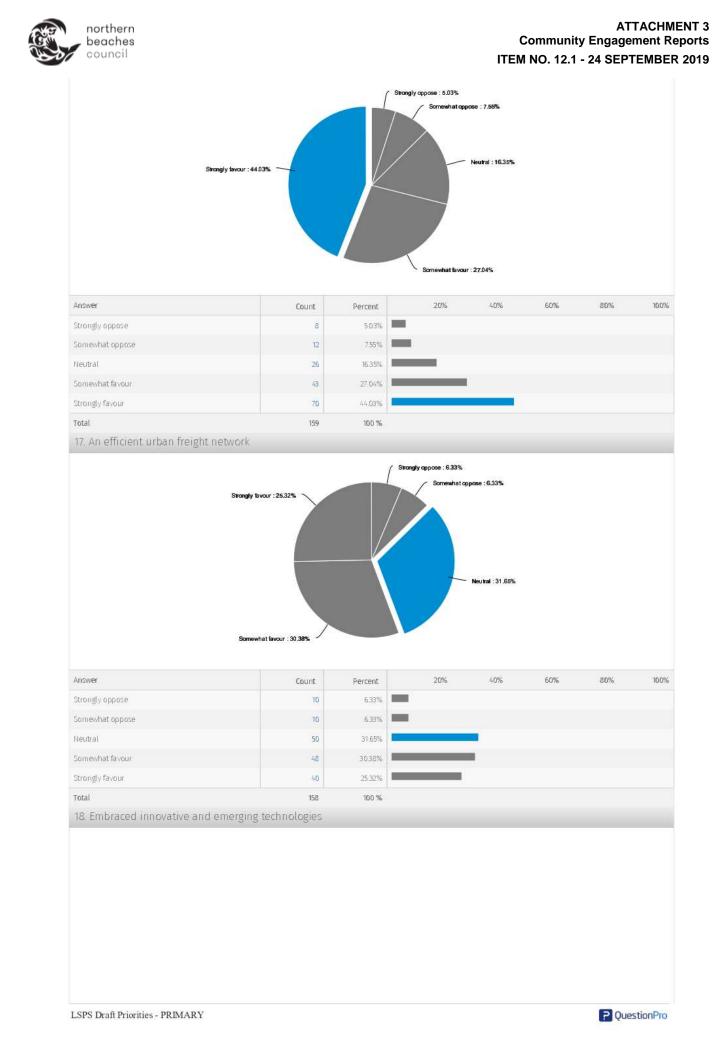




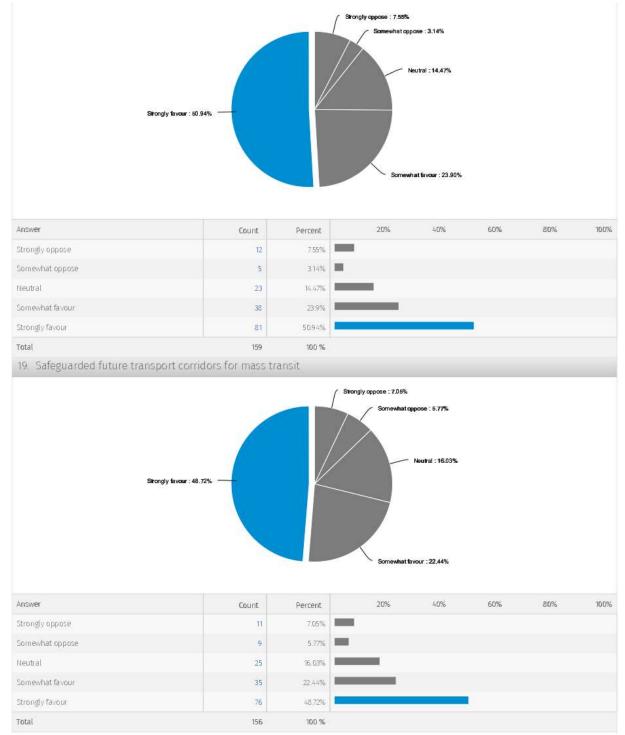
LSPS Draft Priorities - PRIMARY



LSPS Draft Priorities - PRIMARY











ny further ci	omments / su	ggestions on priorities 13, 14, 15, 16, 17, 18 and / or 19
05/05/2019	1606589753	Can the health effects of the 5g towers be studied before putting them near schools and workplaces?
05/05/2019	1606589110	18. Embrace technologies yes. But not 5G. This is enormous health concern. I know I'm not the only patent having huge worries with 5G technology roll out killing us all with radiation beyond. Why are towers in nature. In schools. Next to kindys? It's unsafe for the community.
05/05/2019	1606588893	Strongly oppose 5G being introduced in the northern beaches die to health concerns
05/05/2019	1606585694	East / west public transport improvements are cost effective together with local connections to main routes and local destinations. North / south services to CBD are frequent and efficient from main bus stops. Beaches Link Tunnel is not supported for many reasons - will generate more traffic and parking demand, and have negative impact on health and environment. Benefit cost ratio is less than one according to one economist. Far better to invest in public transport
05/05/2019	1606588324	Absolute need for a Beaches tunnel - thanks
05/04/2019	1606585446	Agree with improving east to west links with more frequent and efficient public transport, as well as feeder buses to the express bus services. These improvements can be made with relatively minimal investment using existing roads. Existing bus services, such as B1 provide a frequent and efficient north / south public transport service and this can be supplemented with additional buses to North Sydney. The Beaches Link Tunnel is not supported by well respected transport planners, including academics, who predict it will exacerbate congestion problems. Council needs to focus on public transport options that will reduce car dependency. The tunnel project does not pass the cost benefit test. It will also impose cost burdens on Council, such as the need to provide more car parking to cope with the influx of cars to the Northern beaches. The urban freight network benefit is unclear, as larger trucks travelling on our roads imposes a greater risk to other road users.
05/04/2019	1606585265	Frequent, fast, direct public transport links from east to west are a must and protecting the corridors of Mona Vale Road and Warringah Road for bus lanes must happen now while those routes are being upgraded.
05/03/2019	1606584904	'Re-purposing road space' - what does this mean? more land clearing for cars just so more cars can clog up roads. It's all about public transport & a the Beaches we have missed out terribly. Need to make it up with better & more public transport. 'Urban freight network' sounds like more large trucks on our urban roads? Not sure what the solution here is. We live in an area that has only one through road if you live on the Peninsula in Newport as we do.
05/03/2019	1606584812	14. the vey worst thing that can happen to the Northern Beaches is the Beaches Link Tunnel. The tunnel will only bring more cars to the Northern Beaches ADDING to the congestion. We need better public transport to REDUCE the number of cars on the road.
05/03/2019	1606584709	Whilst a beached tunnels appears to offer a solution to congestion, this will be very short term and the tunnel will only encourage more development on the peninsula. It's the wrong solution and will destroy the peninsula as we know it
05/03/2019	160658/1773	#13-#16 We are talking about a Mona Vale - Macquarie Park public transport in the future and there is no bus lane on the upgraded Mona Vale Rd. Why? How do you want to provide a good outcome if you do not plan for the future in practice? Mona Vale upgrade is NOT for the future, it's for the past. A very much needed upgrade which will be satisfying for the present but not for the increased traffic in the future. What about Wakehurst Parkway upgrade? What about a direct public transport between Narrabeen and Frenchs Forest via Wakehurst Parkway? What about a tram line between Mona Vale and Manly? What about a tram line on Forest Way? Without a sufficient public transport network we won't be able to reduce traffic on the roads. Look at the public transport networks of the major European cities for example
05/03/2019	1606582022	I am not in favour of the Beaches link Tunnel as I don't believe it will be cost efficient without a much larger population, which I don't want. If it does go a head we need for Wakehurst parkway to be 4 lanes from Seaforth to Narrabeen. Leave Roads as Roads, don't take them away like was done in Redman Rd
05/03/2019	1606581570	Tunnel should be for public transport Push for metro train solutions east/west
05/03/2019	1606580995	Toll reds are not the future archachic There is research re the dearth toll caused by pollution and even cases abroad starting on this as it decreases life expectancy and ur putting it coal hungry options forget it - come into the new age. Everywhere else gets light rail but us tunnel under or bridge over Stop just services to manly vale up Seaforth and north Balgowlah and Balgowlah and Clontarf need services not for manly Seaforth particularly had all the blind development but no botherbof a stop and now regularly can't get on a bus as seevices: like e69 soooo much busier, as well as making it dangerous to turn out of hope street right due to new speed of traffic Think of future mobility
05/03/2019	1606580055	How about we build the transport, rather than just safeguard the corridors!
05/03/2019	1606579131	Please please please a solution to help ease commute to Macquarie park, let's get rid of parking in inner areas of Mona, Avalon, der why and many beach strips. Do what Melbourne is doing and claim those car spots for pedestrians, cyclists. More motorbike parking.
05/02/2019	1606578532	Regional transport initiatives are a state government responsibility not local govt
05/02/2019	1606578485	The time line for East/West an North?South public transport should be 2030. Especially when taking into account that CO2 emission from transport/motor cars is 18 %
05/02/2019	1606578200	I'm not in favour of the beaches tunnel in its current design. It needs to embrace public transport options, or alternatively, develop new public transport options
05/01/2019	1606562113	I am not sure about the necessity of the Beaches Link Tunnel if we get our public transport right and the education and employment opportunities locally
15/01/2019	1606562005	Public transport is the only way to move a lot or people and reduce the need for cars which add demonstrably to congestion, noise and pollution. Bring back the transalong the main arteries (for instance).
04/30/2019	1606555615	kerb and guttering to all homes!!!
4/30/2019	1606555302	14 Tunnel should be for buses only The rest generic to any community 17 What does this mean?
4/30/2019	1606555294	Hopefully we will be using cars less which will massively improve quality of life
4/29/2019	1606550758	they are all priorities
		no tunnel, get more feny services, get people onto walking and bikes therefore less health issues and lessen car numbers.

LSPS Draft Priorities - PRIMARY



04/27/2019	1606541480	13: Yes, reducing the ease of families owning 2 + cars. Parking permits need to be reconsidered to discourage excessive car consumption. 14. A tunnel just creates more car use and also means that the State Govt will see the Northern Beaches as an area that should be accommodating more people. We live here because of the beautiful environment and location, a boom in population will erode that.					
04/26/2019	1606520449	Priority 14. I am strongly opposed to the current design for the Beaches Link Tunnel and in particular the Balgowlah Link Road. The impact on the Balgowlah and Seaforth areas would be devastating for many years to come. We would be left with two unfiltered carcinogenic funnels, road chaos and the environmental destruction caused to the thriving Burnt Creek and Balgowlah Golf Course ecosystems. And for what? Overseas research and experience has shown that it will only increase road system deadlock in the long term. The government must seriously consider the development of further public transport options such as light rail.					
04/25/2019	1606520567	Innovation in vehicular transport, such as autonomous vehicles will dramatically increase the efficiency of existing road infrastructure. Also not sure what future transport corridors exist?					
04/22/2019	1606506615	RE: Q14 - I would like the improved North South public transport, but I am against the Northern Beaches tunnel being built,					
04/22/2019	1606506299	19 Enough space should be reserved in Frenchs Forest, Brookvale, Dee Why, etc. for future metro stations. It will be needed in 30-50-80 years t and in the meantime can be used as an open space or for light-weight commercial or community structures					
04/22/2019	1606506294	In the meantime can be used as an open space or for light-weight commercial or community structures the tunnel as it is currently designed will not meet our future needs and as it stands I am vehemently opposed to it. UTS transport experts have etermined the tunnel design business case does not stack up as it does not prioritise public transport and the design ignores the requirements of tost NB residents, IE. that many commuters drive west and/or originate north of Dee Why and that Spit Bridge commutes have dropped. If the suncil is serious about planning for 2040 to ensure these target themes can be achieved then it should engage it's own transport experts & push is serious about planning for 2040 to ensure these target themes can be achieved then it should engage it's own transport experts & push is serious about planning for 2040 to ensure these target themes can be achieved then it should engage it's own transport experts & push is serious about planning for 2040 to ensure these target themes can be achieved then it should engage it's own transport experts & push is serious about planning for 2040 to ensure these target themes can be achieved then it should engage it's own transport experts & push is serious about planning for 2040 to ensure these target themes can be achieved then it should engage it's own transport experts & push is serious about planning for 2040 to ensure these to avoid the worsening traffic issues at Manly Vale, Brookvale and Dee Why which will only at worse if efforts are not made to make this suit the growing needs of our community (including our health and well-being). Two exits in Balgowla ith no filtering of smoke stacks is just lazy design and only serves Transurban and will have long term adverse affects for residents of eaforth /Balgowlah. If we are to pay at at least \$10 per day to commute we deserve a world class design to suit our growing needs.					
04/22/2019	1606500643	Emphasis on transit systems. No link tunnel without such!!					
04/22/2019	1606500599	Oppose the Link Tunnel without transit system and dedicated bus lanes					
04/22/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL. IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.					
04/21/2019	1606500040	Bicycle/walking paths in the center in Dee Why and to travel safely to Brookvale would be great.					
04/21/2019	1606499623	Mass rapid transit is urgently required. I oppose the tunnel for cars. Cars are ancient technology and should be discouraged Ideally mass rapid transit would be in the form of a metro. B-line is not much improvement on a regular bus. Provide a ferry from Clontarf, Continue the capped Uber pool offer to manly wharf					
04/19/2019	1606494878	Public transport direct to Parramatta would also be a great priority.					
04/19/2019	1606491310	The new Brookvale to Chatswood B-line like bus is unusable to me at the Crown of the Hill, so I have no confidence in the council's solution benefiting me.					
04/18/2019	1606489862	14. The tunnel MUST have a dedicated bus or rail line going each way to support the mass transport movement of the projected population by 2040 on the Beaches.					
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resources to review these questions 20* years ahead. Get more realistic in your planning.					
04/18/2019	1606474654	I stand against the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment. I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.					
04/18/2019	1606489228	Focus on nature					
64/18/2019	1606489009	Re-purposing roads is not the answer for safe bike and pedestrian ways. Slow and fast modes of transport need to be separate. Also, heavy freight being separated from general transport would be a nice to have					
04/18/2019	1606488916	Oppose cuts to ferry services					
04/18/2019	1606484459	I only support the east west rapid tranist proposal if there will not be more residential development that follows					
04/18/2019	1606483261	If you're building a gateway for people to enter the beaches you will need to provide carport to support the tourists, parking is already a nightmare. Pony up the cash and put it underground					
04/17/2019	1606483014	Tunnel should have dedicated bus lane or rail. Air vents/stacks should be filtered					
04/17/2019	1606482975	tunnel is not planned for the anticipated capacity, the tunnel will likely be more congested by 2040 than the harbor tunnel is today, the timeline for tunnel is really slow, its needed now, not 10 years down the line.					
04/17/2019	1606482396	The idea is routinely floated, but a tramline connecting the Northern Beaches via an east / west link to Chatswood terminating at Frenches Forest, Beacon Hill or perhaps as close to bee Why as possible should be lobbied for as a rival, or perhaps even complementary project to the north / south Northern Beaches Tunnel link as a means by which to remove cars off the main arterial roads. The Northern Beaches, save the Lower Eastern Suburbs, is the only established region in the Sydney Metro Area lacking a train link and it has had clear consequences in the dramatic increase in vehicle ownership, and single passenger driving habits of the local community. Much of this traffic however is peak-hour suggesting these individual are commuting and most are headed to the city. A train-link to Wynyard via Chatswood connecting the Northern Beaches would vastly improve the access of the Beaches population to the rest of the city. Terminating as far inland as Frenches Forest would remove the argument of many that the line would bring too many tourists, and would increase the population surrounding the line in the Forest area as seen in other areas of the Sydney Metro line, addressing the Northern District Planning Authority's requirements for the Northern Beaches to take it's fair share of Sydney's rapidly expanding population.					

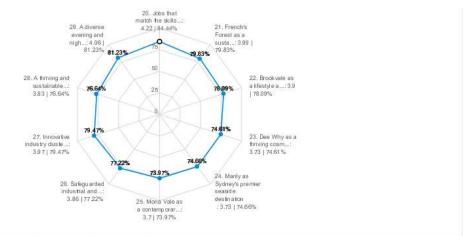


04/17/2019	1606482354	I am opposed to the Tunnel. By the time it will be complete it will already be out of date considering the future trends in transportation. The car as we know it is on the way out; more and more people are using public transport and with the coming of electric and self driving vehicles, and more people working from home, transport is changing. The Tunnel also is a partial solution only, and could easily lead to huge new traffic bottlenecks at either end. And do we really want more cars coming into Manly? I don't think so. We need to be thinking of public transport for the future, and prioritise needs of residents over tourist influx. I also feel strongly that we need to maintain the quality of our Beaches life. Am quite dreading the noise that will come with drones delivering things, and we need to consider amenity of people not just technology for technology sake. Re urban freight, I would not think that is a big issue but there does need to be afe and appropriate ways for freight to get in and out. Most important are walking, cycling and local transport for the people who live and work here. I feel very lucky that I seldom need to use my car, taking advantage of ferries, buses, and feet. I would like to cycle but feel that it is not safe at present. The more people use public transport, walking and cycling the more pleasant is our environment for all.				
04/17/2019	1606476021	Emphasis on public transport eg light rail not more car corridors.				
04/16/2019	1606475143	the Northern Beaches Tunnel. Spend the money on improving Public Transport.				
04/16/2019	1606474712	14. the B-line etc has been very successful in improving these links. The east/west definitely needs more focus. But overall the focus NEEDS to be on making public transport option viable & effecient, and moving away from the car as our main commuting option. I'm opposed to a tunnel that doesnt have dedicated public transport infrastructure.				
04/16/2019	1606474694	18., not 5G networks				
04/16/2019	1606474664	Rail U/ground future,loop NShore line viaTerry Hills(space lge carpark) > FrenchForest>Chatswood				
04/16/2019	1606474635	Make the Beaches tunnel a train line instead of having cars use it.				
04/16/2019	1606474583	There is only so much space. We cannot keep building more roads - we just get more traffic - so we need to repurpose our existing road space to use more efficient means of getting around to compete effectively with the private car. That means public transport and active transport like riding a bike or walking. The B1 provides a useful model for what a service looks like - no timetable, the buses just turn up every 10 minutes. It must be state-owned though for accountability. The current privately owned B1 service shows bad attitudes to other road users - both cars and bikes - and the complaints process has no transparency.				
04/16/2019	1606474525	The introduction of 5G technology would not make any space safe for walking, cycling or sitting inside a house. The technology is simply dangerous and should not be introduced to the Northern Beaches or anywhere within Australia. I strongly oppose the emerging technology that is 5G.				
04/16/2019	1606474481	20. Taken responsibility for the protection of the transport network and community from coastal erosion due to sea level rise, increasing risk of storm surges and global warming generally.				
04/16/2019	1606474465	I oppose the Beaches link tunnel. It is a lazy solution which benefits vested interests and big business and destroys the environment				
04/16/2019	1606474183	Do NOT want or need a Beaches Link Tunnel with the accompanying environmental destruction and excuse for further development in the NB area. We do not want to 'repurpose' road space -unless that means bike lanes. We especially do not want any type of rail lines anywhere on the NB. Due to the geographic constraints of the NB, it is essential that we stop further development for mass transport and encourage people to ride bikes, walk or work from home and move closer to their place of work if that's not possible.				
04/16/2019	1606474251	I oppose the use of 5G technology in innovation and connectivity .				
04/16/2019	1606474223	Train line pronto . Buses are rubbish				
04/16/2019	1606469456	We need better road connections but NOT if it's going to mean you increase population density. The current population needs better roads but if you increase the density as a way of justifying the cost of the infrastructure then no thanks I dong want the infrastructure if that's the price we pay for it. And re technologies- I strongly oppose 5G for health and environmental reasons and don't want the infrastructure put in by stealth. There MUST be community debate and election mandates before going anywhere near 5G.				
04/16/2019	1606468509	We should improve n/s connection but via a Road tunnel. Start with prioritising pt on existing routes. This question is poorly worded and does not give people who want improve pt to say they don't want the tunnel. A proper place based integrate land use and movement study is required not a justification for a major road project. Residents should be presented with well evidence options. Option should be tested not presented a final solution.				
04/16/2019	1606468314	I strongly oppose the 5G rollout in the area - I embrace innovate technologies but not this one - it's too dangerous to health of humans, wildlife and the environment. I don't know what you mean about repurposing road space - i don't want more and bigger roads. Not sure what transport corridors are. Bus lanes are ok as they are in the peak hours				
04/16/2019	1606467677	trains for mass transit and beach link tunnel also to be considered to reduce road congestion and efficient travel times, thereby increasing productivity				
04/16/2019	1606467087	What does 16 really mean? It's a motherhood statement.				
04/16/2019	1606467068	Again no mention of the compromises required to enable these developments wrt the environment and infrastructure				
04/16/2019	1606465492	Not in favour of the tunnel at all				

In 2040 the Northern Beaches will have... Click the '?' to see more information:

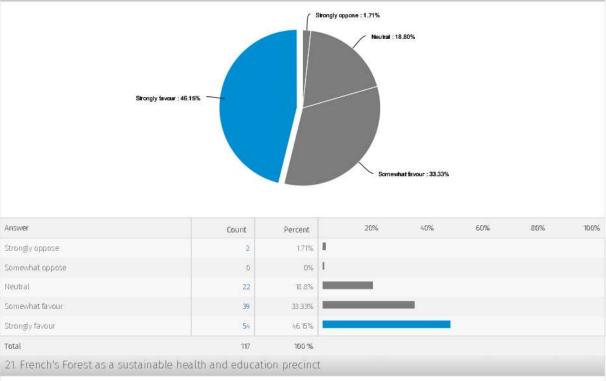
LSPS Draft Priorities - PRIMARY





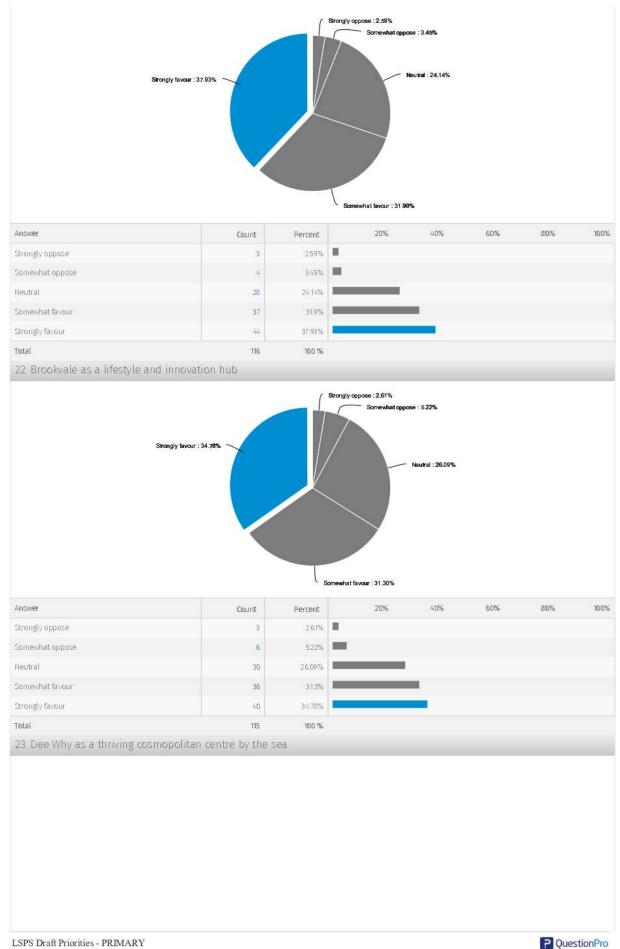
Powered by Al

Question	Count	Score	Strongly oppose	Somewhat oppose	Neutral Somewhat favour	Strongly favou
20. Jobs that match the skills and needs of our community	717	422				
21. French's Forest as a sustainable health and education precinct	116	3.99				
22. Brookvale as a lifestyle and innovation hub	115	3.9				
23. Dee Why as a thriving cosmopolitan centre by the sea	115	3.73				
24. Manly as Sydney's premier seaside destination	116	3,73				
25. Mona Vale as a contemporary, urban heart of the north	116	3.7				
26. Safeguarded industrial and urban services land	115	3.86				
27. Innovative industry clusters	114	397				
28. A thriving and sustainable tourism economy	113	3.83				
29. A diverse evening and night-time economy	114	4.06				
	Average	3.9				

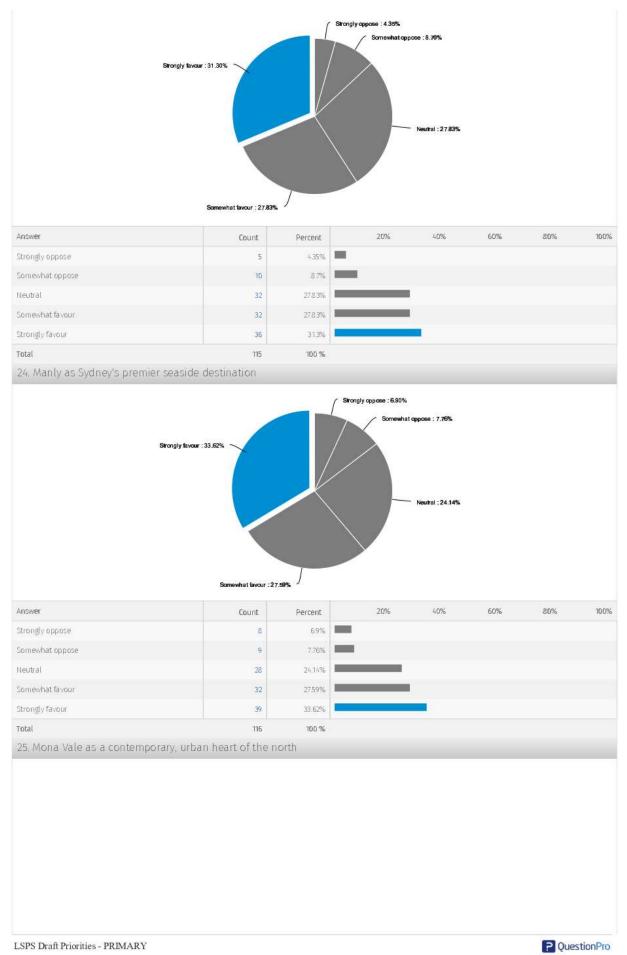


LSPS Draft Priorities - PRIMARY

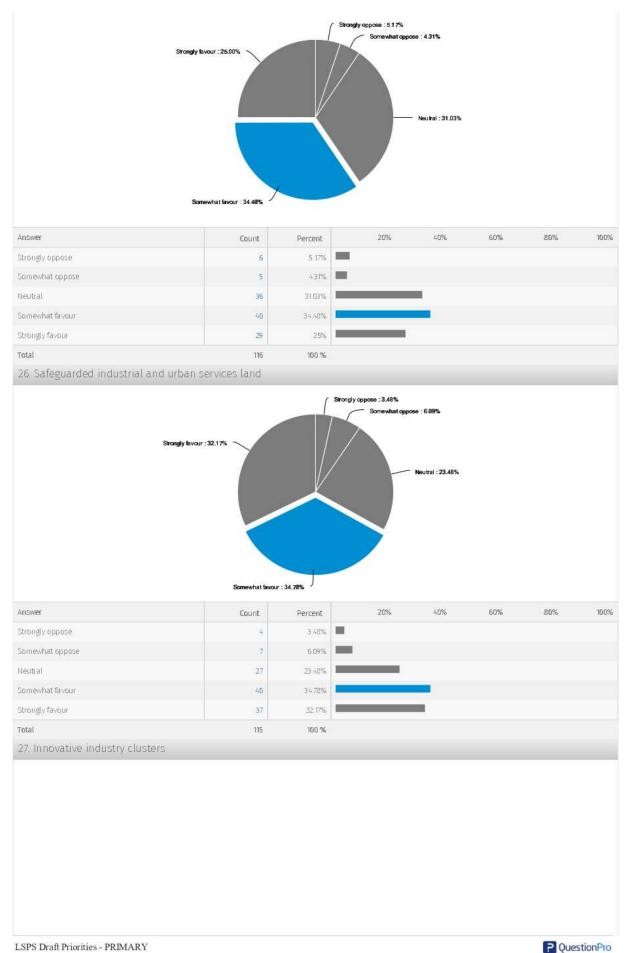




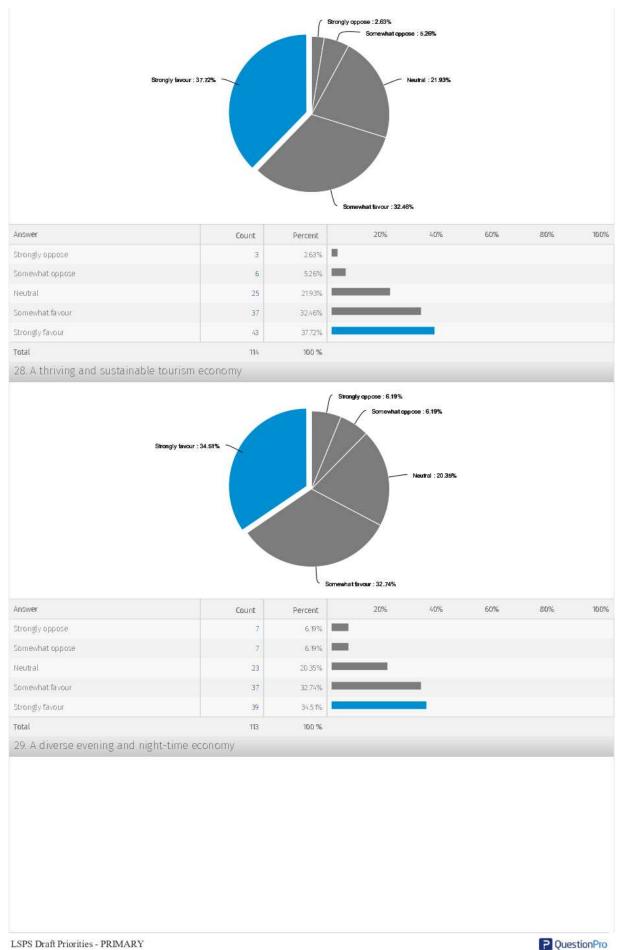




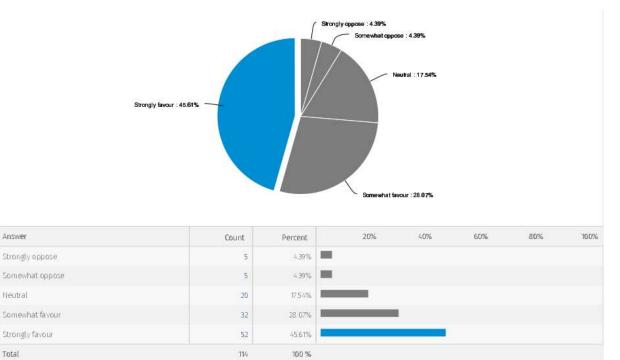












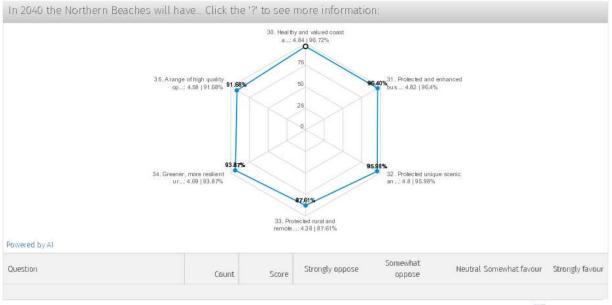
Any further comments / suggestions on priorities 20, 21, 22, 23, 24, 25, 26, 27, 28 and/or 29

Any further o	omments / su	ggestions on priorities 20, 21, 22, 23, 24, 25, 26, 27, 28 and/or 29
05/05/2019	1606585694	French's Forest sustainable health and education precinct should be located within the existing high school and hospital site. Health and education are compatible services that can be co-located close to a transport hub. The relocation of the high school to the Warringah Aquatic Centre area is not supported. This area should be retained for recreation and environmental protection. The site is not suitable for a large high school, which would conflict with the protection of bushland and waterways in Manly Dam. Catchment
05/04/2019	1606585265	It is not clear why it is still appropriate that some of the most desirable land in our LGA is locked away for industrial use when the Northern Beacher only has 3 points of entry and exit. Of course, there will always need to be capacity to provide local services however, whether that should still be on the scale, or in the style of the old is not clear.
05/03/2019	1606584904	This all sounds great however a lot of the terms used here are subjective such as 'contemporary' and 'thriving cosmopolitan' used for Dee Why I would argue that Dee Why is not at all on its way to being 'cosmopolitan' intead it's a jungle of horrible units on top of each other. More green space & better architecture could have created a beautiful area but instead it is just depressing.
05/03/2019	1606581773	#21 It's already cannot be. Frenchs Forest is a good example how to divide a community with a wide road. Instead of sinking the road (the middle lanes) underground and creating a nice green area on top of that with 2x1 lanes and same level pedestrian crossings, you have built noise barriers and two extremely long pedestrian bridges. You want to create a more crowded environment around the hospital with more noise, air and light pollution. A parking house is built right next to the hospital (which is fine) but WITHOUT a living green wall to reduce air pollution or increase aesthetic. How on earth could Frenchs Forest be a sustainable health precinct after this? #23 if you mean "thriving cosmopolitan centre" means an overcrowded suburb with a constant fight for parking place, yes, that's already done, you don't have to wait until 20-0, #25 it seems we have a different understanding of village atmosphere. #28-29 Increase good & frequent public transport, so people can avoid parking problems and drinking & driving. Frequent means 5, max. 10 minutes. I'm a big advocate of trams, have I mentioned yet?
05/03/2019	1606579131	Living in Warriewood it's hrs to get anywhere except by car. More frequent, smaller buses to serve non main roads.
04/30/2019	1606555302	21 Do FF residents agree? 22 Do Bvale residents agree? 23 It already is - leave it alone - no more Meriton style projects 24. It already is - leave it alone 25 What does this mean specifically and have MV residents had real input?
04/30/2019	1606555294	I don't want to be inundated with certain types of tourist. It is possible to be an attractive area without destroying the environment eg Carmel in California
04/27/2019	1606541568	tourism needs to be aligned to growth as well as preserving the beauty if nth beaches otherwise there will be no beauty for people to come and see and it will all be redundant
04/27/2019	1606541480	Our centres do need a bit a lift, esp. Brookvale. But to service more retail etc. you need a bigger population, which I'm sure most people on the Northern Beaches do not want.
04/26/2019	1606520449	The needs of residents and rate payers must be the first priority of Council. Development must be tempered by this consideration.
04/25/2019	1606520567	I'd like to see some thinking around technology startup hub/incubator in Nth Beaches as well as shared workspaces promoted in various suburbs (Forestville).
04/23/2019	1606510345	The Northern Beaches does not need a tunnel to carry more polluting vehicles to and from the city. It need local employment to take traffic off our roads, reduce pollution and give residents additional hours of recreation time currently lost in traffic
04/22/2019	1606506615	I don't like to encourage too much tourism to Manly, as it is a great strain for the locals.
04/22/2019	1606506299	It is not easy to preserve and grow jobs on Northern Beaches until local transport issues will be solved (and it might take at least 10 years). Council should try to increase awareness of local community and our state & federal MPs about issues facing local businesses and to lobby for support measures from the state and federal budgets to maintain & grow high value-adding jobs on Northern Beaches.

LSPS Draft Priorities - PRIMARY

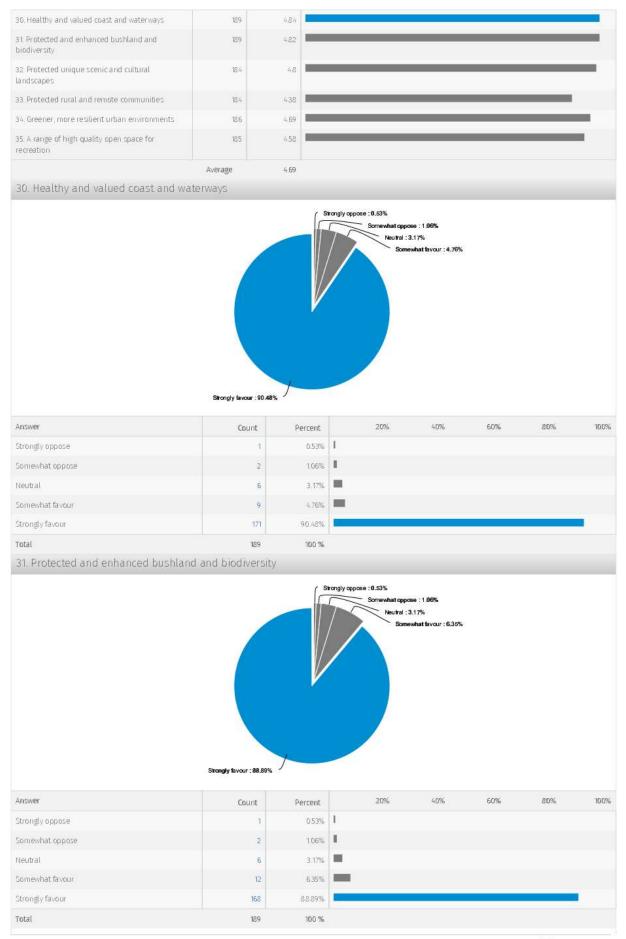


04/22/2019	1606501461	P20 - Why? Isn't this a case of the tail wagging the dog? Does one really expect that business enterprises will establish in NB in accord with the "needs" of the community. A little does of reality would help here.
04/22/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL. IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
04/21/2019	1606500040	Bring a village spirit to Brookvale. Keep Dee Why natural without high rises buildings and concrete. Plant trees and develop more green spaces.
04/19/2019	1606491310	What about the western suburbs?
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resources to review these questions 20+ years ahead. Get more realistic in your planning.
04/18/2019	1606474654	I stand against the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment. I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.
04/18/2019	1606489009	Dee Why is a rat race at the moment and not in line with Northern Beaches community interests. The hub proposed in Frenches Forest will work but more public health services are required and Mona Vale hospital needs a fully functioning emergency ward. If expansion of innovation and businesses is to happen in the Northern Beaches, greater emphasis must be spent on infrastructure.
04/18/2019	1606483261	More pedestrianised city hubs
04/17/2019	1606482975	must start providing higher number of clearances to build medium density housing like duplexes: the rents are expensive and driving people away, more video surveilance to deter theives and anti-social elements.
04/17/2019	1606482407	21. FF Hospital not yet meeting needs of community as expected.
04/17/2019	1606482382	Unless you create vibrant industrial/commercial hubs with transport links and a mixture of open space and cafe/food premises for workers it will not attract business and jobs
04/17/2019	1606482354	Remember that people live in Manly, not just a tourist centre. I do not want Manly sacrificed to tourism. Those of us who live here want to maintain our amenity Evening and night time economy is often code for more and more alcohol. That is not what I want to see. On the other hand, it would be nice to have a theatre for live performance here in Manly. It could be small, like the Hayes Theatre. That would be a great asset to a positive aspect of evening economy. Also the movie theatre!
04/16/2019	1606474664	consider mixed use industrial land, see ancient cities Rome Sienna sml motor workshops/living spaces. Night markets, diverse festivals all demog.
04/16/2019	1606474583	What does 25 mean? 29: As much as they are maligned, the lockout laws have had a notable impact on improving the safety of residents living in those "night-time economy" hubs, making them desirable places to live again. Whatever is done in this space it MUST remain democratic and must NOT prioritise the interests of business owners and out-of-area visitors above residents.
04/16/2019	1606474525	SHould the innovative industries clusters require the use of 5G technology, I would strongly oppose it. Otherwise, I would be more supportive of this. We also need substantial health facilities outside of Frenchs Forest - such as Mona Vale and further South towards Manly/Manly Vale/Brookvale.
04/16/2019	1606474223	See why is an eyesore A's is brookvale
04/16/2019	1606469456	What do you mean about Brookwale being an innovation hub? If you're talking about having a diversity of businesses there- ok. It's a bit tired and daggy is like to see it gentrify a bit and be somewhere you want to stop rather than drive past unless you want building supplies!
04/16/2019	1606468509	Need to plan for mixed use light industrial. Increased Access to job and opportunities will have negative impact Improved pt will increase to s
04/16/2019	1606468314	what does safeguarded industrial and urban services land mean?
04/16/2019	1606467823	Strongly agree with everything in this section. We do need many more sports fields such as soccer pitches to accommodate growth. Many support reduction in golf course space or higher density in the right pockets if more green space is created
04/16/2019	1606467391	Don't forget to invest into improvements in the villages. They are important too!
04/16/2019	1606467087	Re 20, let the market decide. Re 22 & 23, what does that mean? The centre of DY is NOT by the sea. Re 25, MV will be contemporary and urban no matter what NB Council does or does not do.



LSPS Draft Priorities - PRIMARY

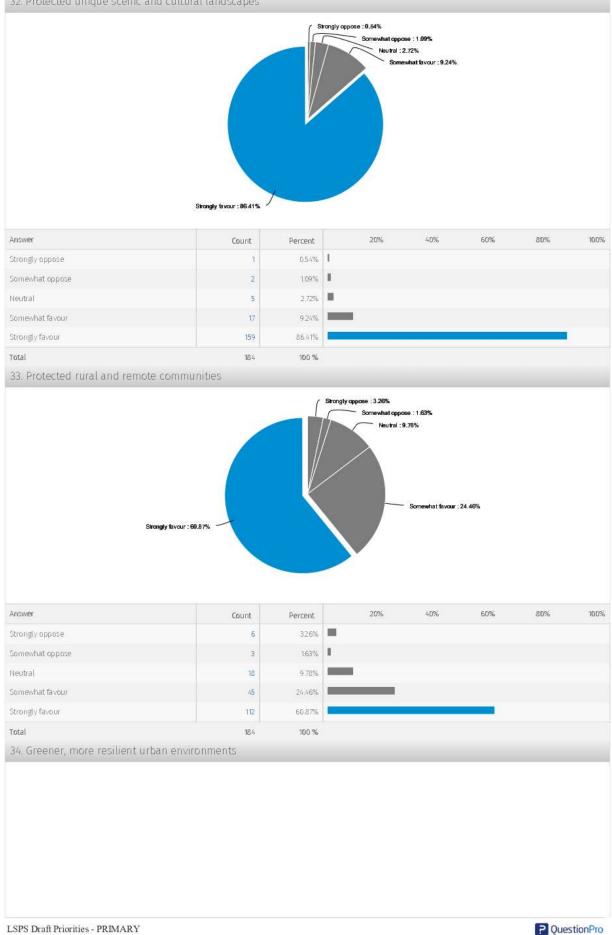




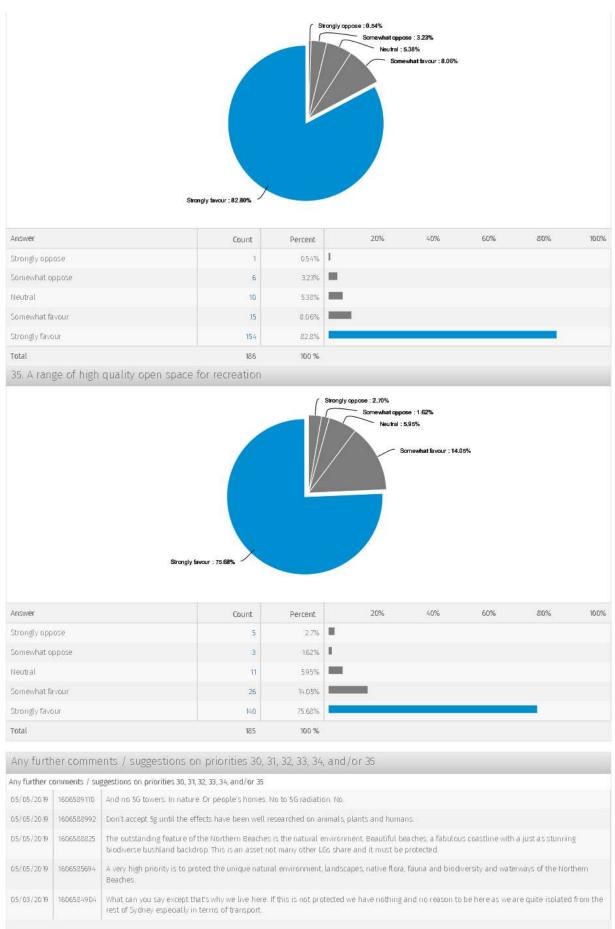
LSPS Draft Priorities - PRIMARY



32. Protected unique scenic and cultural landscapes







LSPS Draft Priorities - PRIMARY

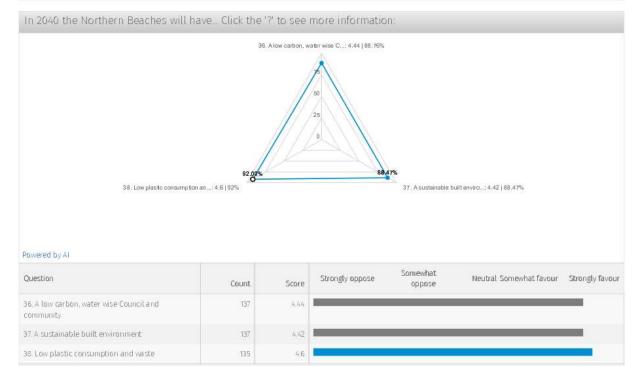


05/03/2019	1606584709	This is critical for future generations, this cannot be compromised in any way
05/03/2019	1606581773	#34 I wish I was seeing this in practise. Mora Vale Rd upgrade and Warringah Rd proves the opposite. We do need wider roads but different design solutions. Both road are perfect example how to increase urban heat island effect and how to reduce connections to green spaces.
05/03/2019	1606582022	We should not go overboard on greening our community. It is already VERY green. Look around, all you can see are trees, so we should not be afraid to take out the odd tree for a good reason.
05/03/2019	1606580995	just makes sense Urban Forests should be in as part of any developments
05/03/2019	1606580055	All the above. But get rid of the traffic hazard trees in the centre of Old Barrenjoey Road.
05/02/2019	1606578347	35. There is more than enough useless, water-demanding, high maintenance open space.
05/02/2019	1606578464	More dog parks and dog friendly beaches
05/01/2019	1606562113	Need to add a specific reference to the creation and maintenance of wildlife corridors. Need to include Lovett Bay and McCarrs Creek into the list of remote communities Need to specifically reference the retention and increase of tree canopy
05/01/2019	1606556528	This is a huge key in maintaining our beautiful environment. Some things we are already doing well but we need to work harder in the Narrabeen Lagoon for instance. The coastline is a huge problem which will need research and care
04/30/2019	1606555615	No bus depots at beaches
04/30/2019	1606555302	32 This will define the survival of the unique character of NB - should be No. 1 priority!
04/27/2019	1606541568	preserve what we have and make sure those who visit keep it that way.
04/27/2019	1606541480	35. Already there are so many sports fields - many are under utilised. Yes we need more open spaces, like parks with trees, but not sports fields.
04/25/2019	1606520567	With a changing climate I think we should allow reflection resistance roofing options as well as more solar and fully local renewable energy generation.
04/22/2019	1606506307	35. Passive recreation is favoured here and should be given priority over more sporting fields.
04/22/2019	1606506282	Restore natural vegetation and bushland on public lands. Apply the principles and provisions of SEPP 19 Bushland in Urban Areas and engage the public through Council Community Activities and programs to achieve positive outcomes for the environment. Land owners/managers can make a positive contribution to ecological health and diversity. SEPP 19 contains all of the important elements.
04/22/2019	1606506237	Our unique wetlands, rockplatforms and bush areas and our wildlife are under attack from dogs, cats and their vocal feral owners. Time to ban cats from roaming and time to enforce the rules on dogs. We have migratory birds that fly great distances from Eg Siberia arrive here on beaches and find dogs. Why is our environment so far down the list. I don't want to live in a tower with cement I want to live in amongst Bushland. Please protect the Wildlife corridors. Protect Nesting Hollows. Protect Unique areas that support our flora and fauna. Narrabeen lagoon needs some rules on feral bike riders and their speed. We need respect for our wildlife and reinstatement of cat bans that have been removed around wetlands and bush areas. Education and giving people an idea that not all wildlife is deadly and also that it cannot be treated as worthless and killed or hurt at their whim. That includes state government projects.
04/22/2019	1606506212	Manly Dam bush land and the Balgowlah Golf Course need to be saved in their entirety for future generations living in our beautiful area.
04/22/2019	1606506158	Protect biodiversity and the natural environment
04/22/2019	1606500643	NBC area already has probably the highest area of protected green spaces of any global community. Some use of this space must be allowed for sporting facilities
04/22/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL. IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
04/21/2019	1606500040	Open spaces with trees and grass. No concrete. Allow for people commuting with their bikes.
04/21/2019	1606499756	Our waterways are a priority, and part of the "unique" character of our local area & lifestyle - supporting not only local residents but also visitors to the area. Any further development will add to "water run-off" into the waterway.
04/20/2019	1606497740	Stronger development laws for incorporation of trees and planting in urban developments, sweet shapes and local parks as they improve the health and well being for all living things.
04/19/2019	1606491975	Town centres should be updated to reflect the beatiful area we live in. Pittwater town centres should be used as a template.
04/19/2019	1606491310	What rural and remote? In the Northern Beaches IIII
04/19/2019	1606489862	35. That does not mean closing down a few local public golf courses to create a number of new soccer or cricket pitches. I'm strongly in favour of setting aside flat land in new zonings rather than taking away and then repurposing already existing beautiful and well used every day of the week current open GREEN space such as the present golf courses.
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resources to review these questions 20+ years ahead. Get more realistic in your planning.
04/18/2019	1606474654	I stand against the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment. I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.
04/18/2019	1606489228	Why do you keep over developing?
04/18/2019	1606488929	No idea what is involved with your meaning of 'protected' It is time to get rid of commercial fishing within 10 km of Pittwater
04/18/2019	1606484459	Please maintain the tree cariopies and open spaces particularly around the Frenchs Forest (Forestway). The number of the trees that have been destroyed is a disgrace. Also, the 10/50 rule that allows residents to remove trees needs to be revisited. Residents are using it as an excuse to cut down trees in the neighbourhood.
04/18/2019	1606483261	Keep the 18 hole golf courses but free up space by utilising the 9 hole courses. How many people under 40 play golf?

LSPS Draft Priorities - PRIMARY



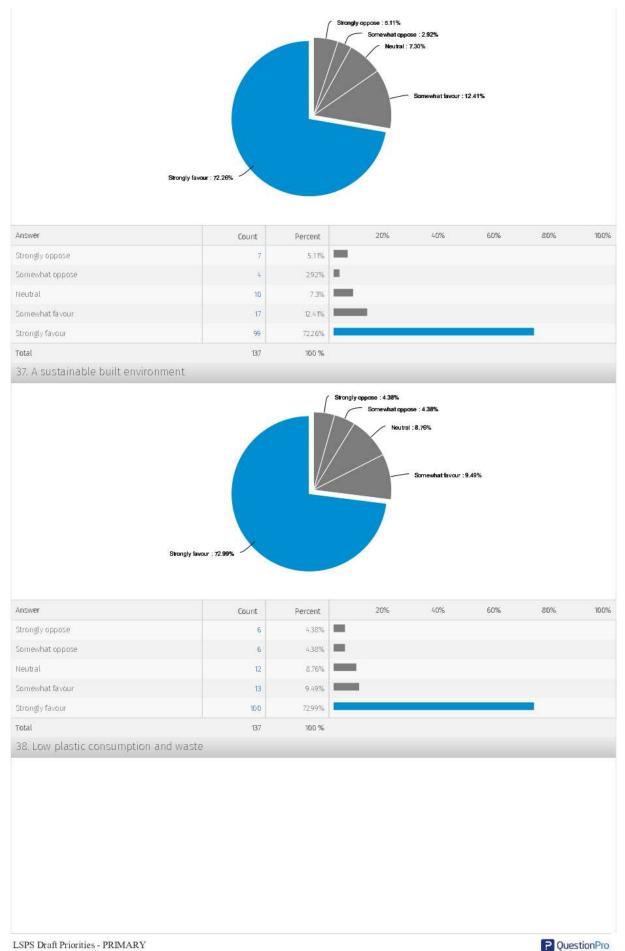
04/17/2019	1606482354	All of these are under threat but are so very important to everything about the Beaches. Why bother living or visiting here if these are compromised. We must protect them, they are valuable for physical health, mental health, ecological health and our economy.
04/17/2019	1606475844	I really see this as something that needs a great amount of attention. As a Dee Why resident, the population is huge, and very diverse. With this comes a lack in attention to recycling and waste Managment. I am continually picking up rubbish on walks. More attention on environmental issues with in the community like art murals on walls to express keeping our oceans clean etc, signage etc, the higher density it becomes the more of an issue this is becoming
04/16/2019	1606474712	Does item 33 even relate to the northern beaches?
04/16/2019	1606474664	Water features (recycled) reduce CC impacts heat island effect, vulnerable residents, beauty, interest, fun
04/16/2019	160647458.3	To avoid sprawl, policies must concentrate on allowing sustainable increases in density in existing areas - better transport, better building codes, better quality and MUCH more and better managed public open space, and actually doing something for the substantial mountain biking population on the northern beaches instead of just talking about it. I want a decent integrated authorised trail network before I die. You've been talking about it for over 13 years and we're still no closer. Little pockets liek Manly Dam and the old Belrose waste transfer station are nice, but still fail t adress pent-up demand.
04/16/2019	1606474588	I strongly oppose the implementation of 5G due to the health and environmental risk especially with no real testing. Please do NOT implement this here. Please I am begging you from my heart, think of the health of those that live here, including you
04/16/2019	1606474525	All of these points which I strongly favour are facing destruction by 5 G technology. It is proven to kill insects or drive them away - which are vital to maintaining healthy ecosystems. We need to preserve the beaches - we don't need faster mobile phone download speeds.
04/16/2019	1606474465	This is one of my top priorities. Public space, such as golf courses, should be returned for use by all residents
04/16/2019	1606474342	Q30 - 'highly valued' should mean more than money - they already are highly valued in that sense. Not sure how you measure 'value' on a social, cultural, environmental services etc way.
04/16/2019	1606474340	Though how this will be achieved with the drive to increase housing on the Northern Beaches will be interesting
04/16/2019	1606474183	All so essential, but this policy seems in direct opposition to the current government policy of population increase and development at all costs to the detriment of our natural environment. The NB has the most environmentally sensitive and uniquely beautiful landscapes and needs to be protected at all costs for future generations and the local flora and fauna. More endemic canopy trees need to be planted to replace the thousands being felled for development and to mitigate the effects of climate change by cooling our suburbs & public areas and conserving energy.
04/16/2019	1606474251	Keep our landscape spaces free of 5G technology
04/16/2019	1606469456	High quality open space sounds like fake built green space - leave Bush natural - keep density low and don't go building loads of parks to give a huge population somewhere to go. Leave as much of the natural environment alone as you can, or protect t. Leave the rest of the forest in the forest. It's precious now, every old tree counts.
04/16/2019	1606468509	Rethink golfcourses with low usage accessible location eg warring
04/16/2019	1606468314	top priority
04/16/2019	1606467391	Review of Urban Tree Canopy policy should progress. What stage is it at?
04/16/2019	1606467087	35 includes protecting golf courses. Once they are gone, they will never come back.



Average 4.49 36. A low carbon, water wise Council and community

LSPS Draft Priorities - PRIMARY







	Strongly favour : 82.22%		Neutral :	sse : 2 <i>22%</i> 6.67% newhatfavour : 5.19%			
	Serongly tavour : 82.22%						
Answer	Count	Percent	20%	40%	60%	80%	100%
Answer Strongly oppose		Percent 3.7%	20%	40%	60%	80%	100%
	Count		20%	40%	60%	80%	10.0%
Strongly oppose	Count 5	3.7%	20%	40%	60%	80%	100%
Strongly oppose Somewhat oppose	Count 5 3	3.7% 2.22%	20%	40%	60%	80%	100%
Strongly oppose Somewhat oppose Neutral	Count 5 3 9	3.7% 2.22% 6.67%	20%	40%	60%	20%	100%

LSPS Draft Priorities - PRIMARY





Any further o	omments / su	ggestions on priorities 36, 37 and / or 38
05/05/2019	1606589110	Huge zero plastic. Bulk centres so no packaging Take hats to refill for shampoo oil rice etc. no plastic. No litter
05/05/2019	1606585694	A lot more can be done to reduce waste going to landfill. There are many cost effective, innovative and practical initiatives that Council can pursue to reduce, recycle and reuse items and waste products that currently end up in landfill.
05/03/2019	1606585141	38 A FEDERAL LEGISLATED ISSUE NOT LOCAL COUNCIL
05/03/2019	1606584904	I really, really, really, really hope so. People have to learn somehow that what we share is as important as what we own personally. What good is it having a beautiful waterfront property if we can't leave them to enjoy our streets & communities.
05/03/2019	1606581773	#38 I agree that council should show a good example. However, wasting heaps of dollar for changing all the bins without community consultation, having a booking system for the council clean up instead of the scheduled system, destroying all the stuff while collecting on council clean up instead of selecting and providing an opportunity for locals to recycle them from a dedicated place are NOT good examples.
05/03/2019	1606582022	Lay off the Low Carbon crap. There is no problem now so we don't need to spend a lot of money that will do absolutely nothing to change the work or our community.
05/03/2019	1606581570	We need to address our recycling facilities and not just passing to someone else
05/03/2019	1606580995	Do not understand why council does not offer food waste service or work bins to encourage reduction in landfill
05/01/2019	1606562113	No specific mention of promoting range of renewable energy strategies. This is both a business opportunity for Council and vital for achieving substantial reduction of carbon in the atmosphere.
04/30/2019	1606555615	ban single use plastic bags NOWI No new dwellings or renovations without watertanks and solar panels. Electric car facilities in all suburbs
04/30/2019	1606555302	All motherhood eco babble
04/28/2019	1606543424	38: low waste on everything not just plastic.
04/27/2019	1606541568	reduce waste and plastic and reward businesses for doing so and consumers.
04/27/2019	1606541480	38. This point should be ALL consumption, not just plastic. What about people owning 4 cars, boats, houses that are too big buying new clothes all the time etc. Plastic is only a very small part of the over consumption happening on the Northern Beachers. Encouraging more retail shops and centres and thus spending inherently means more resources are consumed, so this plan should consider this conundrum.
04/25/2019	1606520567	In our household, most plastics come from retail in the form of packaging. Not sure what influence the council can have to impact change on this source of plastic consumption?
04/24/2019	1606520058	36 - a NO carbon Council and Community. Let's be the leaders in clean energy.
04/22/2019	1606506299	Sustainability measures should be economically viable and profitable (at least in the medium to long term periods) rather than being viewed as another additional cost and extra burden for the council, local home buyers / upgraders and developers.
04/22/2019	1606502038	Local government should ban single use plastics, and also incentivise solar and renewable energy adoption plus passive house planning and certification.
04/22/2019	1606501766	I would like to see weekly food waste collections to reduce household waste to landfill. I would also like to see more ownership enforced on indust for the plastic package their product come in and be responsible for their collection or recycling. I would like to see solar panels subsides for all no builds & mandatory solar panels for new commercial buildings or unit complexes. I would like to see research and/or subsides for solar batteries for households and businesses
04/22/2019	1606500643	NBC needs to be more innovative in waste reduction/disposal and treatment. Use of systems that create environmental advantage, reusable products and energy. NB the bin change over is a wasteful and poorly conducted exercise
04/22/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL. IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
04/21/2019	1606500040	The noise coming from Air Cond units has become a real issue for Dee Why. DA should never allow for rooftops Air Cond units and go in parkings/basements instead
04/21/2019	1606499756	Continue to encourage & "role model" sustainable business practises, consumption & waste
54/19/2019	1606491975	We need to take responsibility of our own waste and invest in our own recycling plants to avoid our rubbish being sent off shore or into landfill. We use it, we should deal with it. Remove single use plastics altogether by 2040. No Straws, bags. Bottles, food packaging.
34/19/2019	1606491310	All cost money for virtue signally rubbish
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resource to review these questions 20+ years ahead. Get more realistic in your planning.
04/18/2019	1606474654	I stand against the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment. I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.
04/18/2019	1606489228	Less built environment
04/18/2019	1606489009	Environmentally friendly and sustainable does not mean cut out plastics and water use. Recycling is the aim both water and no single use plastic items.
04/18/2019	1606488929	Get rid of all oil driven vehicles and use only EV's. Change nge the buses to electric immediately. Compulsory roof top solar on any new buildings. Rooftop solar and wind anywhere possible. Storage batteries evenywhere. Charging stations all over the council. Wake up and take the protection of the environment seriously.
04/18/2019	1606483261	Better recycling, make companies pay

LSPS Draft Priorities - PRIMARY



04/17/2019	1606482975	must encourage and support of use of electric vehicles and scooters to get to major bus stops, must have publicly available information on internet about real-time status of park-n-ride vacant lots, dee why library parking lot must be converted to multi-story park-n-ride facility, remember we are talking about 20 years from now! park-n-ride are already full at office hours in year 2019, whats the vision for 2040 ?
04/17/2019	1606482396	The Northern Beaches council should commit itself to banning the bag, and lobbying businesses throughout the community to following suit.
04/17/2019	1606475844	Yes this is all fantastic but how is the council going to achieve this?
04/16/2019	1606474664	aim zero carbon emissions 2030, pushes community to try harder
04/16/2019	1606474525	And also a non-5G community which is known to harm wildlife - which is not good for a sustainable environment.
04/16/2019	1606474465	A top priority
04/16/2019	1606474342	I suggest that Q38 is a bit out of the reach of the council to drive. Can contribute to a discussion and drive changes within it's own procurement and educational approach etc. Similarly with build environment. Those building codes are state based, not local.
04/16/2019	1606474340	Has to have all of these
04/16/2019	1606469456	Sustainable meant NOT high density
04/16/2019	1606468314	NO 5G
04/16/2019	1606467676	These are State issues, not councils
04/16/2019	1606467677	low carbon, mainly renewables, especially electricity from photovoltaics and solar heating should be integrated in the new housing development
04/16/2019	1606467575	More council, (local), issues and State and Commonwealth issues
04/16/2019	1606467391	Encourage, facilitate and REWARD sustainable building practices
04/16/2019	1606466174	We need to have compost recycling in with the green waste.

39. A high level of resilience...: 4.41 [88.28% 75 50 25 0



Question	Count	Score	Strongly oppose	Somewhat oppose	Neutral Somewhat favour	Strongly favou
89. A high level of resilience to natural hazards and climate change	128	4,41				
	Average	4,41				
39. A high level of resilience to natural	hazards and	l climate	change			
Strongly favou	r : 71.095			Somewhat	avour : 14.06%	



Answer	Count	Percent	20%	40%	60%	80%	100%
Strongly oppose	7	5.47%	-				
Somewhat oppose	5	3.9 1%	=				
Neutral	7	5 47%	-				
Somewhat favour	18	14.06%					
Strongly favour	91	71.09%					
Total	128	100 %					

Any further comments / suggestions on priority 39

Any turin	ercomme	ents / suggestions on priority 39
Any further o	omments / su	ggestions on priority 39
05/05/2019	1606589110	No 5G.
05/05/2019	1606585694	Exposure to natural hazards should be prevented where possible. This includes avoiding development in high bush fire prone areas and in flood prone areas. Conversely, bushland and flood prone areas have environmental values that should be protected from inappropriate development.
05/04/2019	1606585265	We should not be spending rate payers money protecting homes in Collaroy that are built in the sand dunes. These homes will inevitably be the victim of coastal forces and it is matter for those people who have bought in that risky environment to bear that risk.
05/03/2019	1606584904	Again, if we think like this we are safeguarding our future.
05/03/2019	1606582022	Climate Change???? Does council really believe they can change the four seasons of the year? There is no problem to worry about so stop wasting s much time on a non-existent problem.
05/03/2019	1606584570	We need to be prepared for sex levels rising and how this will impact our coastline
05/03/2019	1606580995	Proactive not reactive might like collator few years ago Council should never given planning as was fully aware of the erosion
05/03/2019	1606580055	Motherhood statement?
04/30/2019	1606555302	Ditto
04/29/2019	1606547635	Climate change needs to be recognised as a symptom of the implied belief that the economic growth can continue indefinitely. At all levels of government we need to be discussing the transition from the growth economy to the steady state economy.
04/27/2019	1606541480	39. Yes, but if people buy properties in known climate change risk zones, should the rest of the community be forced to pay for protection of their properties? e.g. Collaroy.
04/25/2019	1606526104	To be more resilient to dimate change, Northern Beaches Council needs to take more action on renewable energy, to include dimate change risk in urban planning and advocate for more action on climate change by state and federal governments.
54/25/2019	1606520567	Housing standards around build quality and energy efficiency should help.
04/23/2019	1606514466	Environmental protection should be a higher priority than housing growth
04/22/2019	1606506307	39. Unsure how an answer to this question can be interpreted.
64/22/2019	1606506237	Climate change is here. Make sure Pittwater road doesn't float away. We need to reduce carbon and push for more solar for every home. The waste from restaurants cafes should be collected like Melbourne do and processed. See war on waste. No plastic balloons Turtle killers should be used here. Ban plastic bags. Use paper bags. Worms farms are easy to use. Small parcels of land that are too hard to be a play area should be repurposed to be local Bushland for wildlife. Planted with native plants only. Allow the brushturkeys and lyrebird to do their jobs.
04/22/2019	1606500643	NBC clearly believes in man-made climate change. That does not necessarily accord with many residents. Yes climate change is occurring as always but NO COUNCIL POLICIES SHOULD BE BASED ON IPCC AND SIMILAR BODY EVIDENCE BECAUSE IT LACKS INTEGRITY!
04/22/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
04/21/2019	1606499561	ZERO WASTE PRIORITY. Our out of control consumerism DRIVES climate chaos (mining and disposal of non renewable resources, and use of water energy transport only to toss in tip)
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resource to review these questions 20+ years ahead. Get more realistic in your planning.
04/18/2019	1606474654	I stand against the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment. I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.
04/18/2019	1606484419	Thinking of rising oceans.
04/18/2019	1606483757	Climate change should have been the first priority
04/18/2019	1606483261	Fight climate change don't prepare for it
04/17/2019	1606483014	Engage aboriginal expertise (see Den Barber) to engage in cultural burning as done in Blue Mountains, rather than hazard reduction which does no work with seasons and can have far worse impact on native bush land & wildlife.
04/17/2019	1606482382	I thought you meant resilience of people with such things as mental health/ suicide/ disability etc so that the community can work together to address these issues and overcome personal tragedy and loss.
04/17/2019	1606482354	This is very important and our Council seems committed to sustainabaility but we need to work MUCH HARDER on this, and try to get our backward state and federal governments on board. It is the future of our community and our world at stake.
04/17/2019	1606476021	High level resilience and also proactive measures to reduce the causes of climate change

LSPS Draft Priorities - PRIMARY



04/16/2019	1606474664	teach/practice comm resilience via schools/LG/orgs respond catastrophe hi temps bushfire floods storm surge
04/16/2019	1606474531	We shouldn't just be resisting the effects, we should be mitigating the cause.
04/16/2019	1606474525	Although I do favour this, I also strongly favour resisting non-natural hazards - such as not introducing hazardous 5G radiation in the community.
04/16/2019	1606474481	39a. Taken responsibility for the protection of the transport network and community from coastal erosion due to sea level rise, increasing risk of storm surges and global warming generally.
04/16/2019	1606474123	Very general question. Not sure exactly what it means?? Do not think we should be throwing money at the residents who have chosen to live and build houses directly on the beaches/water which obviously are going to be effected by rising oceans in the future. Think that is the residents' direct responsibility as it is their choice to live in a potentially dangerous location. Also think the 1050 tree felling Laws are a terrible mistake for this area and have allowed thousands of trees to be felled to improve residents' views but using the excuse that the trees were a fire hazard. These laws need to be changed and opposed by NB Council & more needs to be done by Council to save our canopy trees as these directly help in absorbing the increased levels of Co2 and cooling the suburbs and saving energy by not using air cons.
04/16/2019	1606474342	if this means getting more actively politically and adding a voice to federal & state level politics I'm all for it
04/16/2019	1606474340	Mandatory
04/16/2019	1606469456	Learn lessons from the Brookvale storage unit fire - waterways were affected by firefighting foam.
04/16/2019	1606468314	WORLD WIDE 5G TECHNOLOGY WILL WORSEN CLIMATE CHANGE AND NATURAL HAZARDS
04/16/2019	1606467824	Resilience to natural hazards is great, but most of this can be done with positive interactions and respect of natural processes. Accepting that the built environment has not been overlayed appropriately needs to happen and then rectified.

Any further comments / suggestions on the draft LSPS priorities

Any further c	omments / su	ggestions on the draft LSPS priorities
05/05/2019	1606589753	Can the 5g towers be revised and studied for their health effects to the human body before being set up near schools and workplaces?
05/05/2019	1606589110	Seriously. I say NO 5G It's not proven safe. People don't want it.
05/05/2019	1606589046	No 5G, as it is unsafe and untested, we don't need more radiation, this is not sustainable to the environment or our health just for the sake of faster internet. Protect the future of our children's health please.
05/05/2019	1606588825	The second single most important issue is to allow next generations to also find what we enjoy: address our Climate Emergency with firstly mitigation measures and secondly adaptation measure .
05/05/2019	1606585694	The framework for LSPS priorities should include environment protection, sustainability and ESD principles.
05/05/2019	1606588502	Do not allow 5G towers
05/05/2019	1606588335	To research and seriously consider the detrimental side effects to the health of the local people and wild life with the installation of 5G network.
05/05/2019	1606588324	Please NO 5G. If you are not sure simply go only and google it - It's growing and council have been put to court in Switzerland and UK and people won. Tunnelis a must have for the future, given the growth and numbrr of cars in next 20 years
05/04/2019	1606588287	Stop 5 G roll out until long term studies prove safety and no health risk due to the increase of radiation levels
05/04/2019	1606586169	No Northern Beaches Tunnels or increase in the Northern Beaches Population. More infrastructure for what is already here, including better town planning of new developments in regards to access, roads and parking. Parking spaces must be able to accommodate large family cars and tradies utes! Better swimming pool access for water polo if the sport is to grow - consider the number of young kids that start then drop off because pool access is limited and late at night. Also, playing fields can't all be shared with dog walkers (dog droppings in every park). Better drainage and parking needed for all playing fields.
05/03/2019	1606584873	Note the post code below does not show correct suburb no correct option. Can't you even get that correct
05/03/2019	1606584812	Restore all services to Mona Vale Hospital.
05/03/2019	1606581773	I have read these nice thoughts & words before but I'm disappointed in the Council's execution so far
05/03/2019	1606582022	Council needs to look at ways of trimming expenses and getting rid of wasteful, time consuming, and expensive rubbish surveys like this one might be a start
05/03/2019	1606580995	Facilities for teenagers (outside deewhy and upper) School funding public school Support services in public schools
05/03/2019	1606580870	I would hope that Council would be aware of planning public transport for the whole of the council area not just lower northern beaches. It will be sensitive to development in relation to amenities and ability of landscape to accommodate it. I'm not happy about overdevelopment at the expense of the community spirit and services.
05/02/2019	1606578485	Unfortunately there is no mention how council can promote CO2 reduction through strong initiatives for clean energy.
05/02/2019	1606578347	The Council must adopt the over-arching concept of ecology - human and environmental - and sustainability and not just accept the whims and political corruption of the State Government. The Northern Beaches are a fragile environment and a growing population should not be accepted as inevitable. The State Govt's ideas for Sydney need to be resisted above all else. Biodiversity, water quality, conservation and a falling population should be the main focus of Council
05/01/2019	1606562113	I'm just warming up
05/01/2019	1606562005	Yes the offshore community receives little by way of services for our rates. Still no water, severage etc. That we can live with, but when we still struggle with poor urban planning, a lack of policing of local ordinance (e.g. people parking their problem —trailers, boats on local streets_people filling up the commuter wharf without paying for its use etcetc), a lack of properly designed wharves for commuter boats in the Bays etcwhat's the point of all the initiatives for the on-shore community? We need both to be addressed.
04/30/2019	1606555615	All new developments of medium density "villages" need the roads and schools and other amenities built before the actual houses/apartments.
04/29/2019	1606550758	Too much jargon !!

LSPS Draft Priorities - PRIMARY



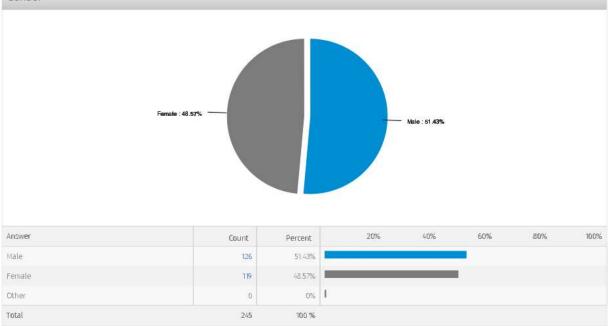
04/28/2019	1606543424	Commercial-grade composting collection for all residents (promised in 2012 by Warringah Council) Innovation and legislation to enforce that all loca businesses reduce their waste. Electric car charging points and purchase incentives eg: priorty lanes (work with state gov) and free parking
04/26/2019	1606520449	When I entered my postcode below my suburb came up as Manly Vale but this is incorrect - it is Balgowlah Heights.
04/22/2019	1606506615	Instead of more giant unit blocks, more thought needs to go into allowing more granny flats, duplexes and subdivision of large blocks. Population growth needs to slow right down. The Northern Beaches tunnel link will destroy the suburbs near the entrance, just like is happening at the West Connex currently.
94/22/2019	1606506299	It would be great if the council will educate the broader community about the real picture and various aspects related to local population growth and its drivers (ageing, etc.), housing needs, local economy & its challenges, etc. so the debate about new LEP and strategic priorities will be more collaborative and fact-based rather than a political point-scoring drama driven by slogans and NIMBY activism.
04/22/2019	1606506307	Your postcode does not link to all suburbs in the 2093 zone. This seems odd because these suburbs are quite diverse. The suburb Terrey Hills is spelt incorrectly in the summary. This should be corrected.
04/22/2019	1606501461	Many of these priorities are motherhood statements, and subject to very wide interpretation by the decision-makers in their implementation. Experience tells me that the manner in which a priority is interpreted and operationalised will inevitably be a function of the ideological inclination: of the decision-makers. Then will be the time to judge whether or not we've all been wasting our collective time over the years before-hand.
04/22/2019	1606500401	THIS IS MEANINGLESS DONE AT THE NBC LEVEL IT HAS TO BE DONE AT THE WARD LEVEL AT LEAST TO ASCERTAIN LOCAL PRIORITIES.
04/21/2019	1606500040	More native trees (not Meriton planting palm trees to replace our beautiful old trees) More bioycle paths (at the moment we fear for our lives in Der Why as the road has become a highway) Less noise (Air Conds should be more regulated and illegal installations condemned in a more responsive manner - Re Illegal Air Cond Installations on the roof of the should be more regulated and illegal installations (Air Conds should be more regulated and illegal installations condemned in a more responsive adjacent habitations, disproportionate size, traffic, loss of views, noise, overall aspect of Dee Why) Less Coles/Woolworth in high density areas - the should be built outside of our villages/cities in industrial areas Preserve our heritage
04/21/2019	1606499623	Educate the community about the benefits of well designed density. At the moment a metro and the required density to support it is sudden death to politicians so will not be considered. Northern beaches hospital having been built without rail is outrageous.
04/21/2019	1606499603	keep density low, particularly as you proceed north along the peninsula where vehicular travel time and traffic flow are a problem.
04/21/2019	1606499561	This council is too remote, not easy to get to meetings and with not enough community representation
4/20/2019	1606497740	Put biodiversity education at the top of the list so residents understand how the natural world is integral to our quality of life.
14/19/2019	1606491975	Better public transport. The new tunnel should support a none stop transfer of people from one central transport hub to the city, perhaps Frencher forest, with multi-level commuter car park and bus interchange and a high speed non-stop train to the city. Commute times have increased by 50% over the last 10 years.
4/19/2019	1606491310	What a dodgy questionaire. The answers wanted are embedded in the questions.
14/19/2019	1606489862	Don't forget to consult with the locals on what they want to see actually become reality in each of those 39 marvellous priority categories. What you mob think we want and what we actually want to be the end result of our rates money and your "visions" of the future are very likely two entirely different things and will therefor need corrections at the ballot box during Council elections.
04/18/2019	1606489277	The Northern Beaches in 2040 will be a totally different place to anything that you or I could imagine today, so it's a pointless waste of our resource to review these questions 20+ years ahead. Get more realistic in your planning.
04/18/2019	1606474654	I stand against the roll out of 5G technology which is untested for our safety. The technology has never been tested for its impact on humans, wildlife, insects and the environment. I don't want this anywhere near my home, my family or in my community when no safety studies have been performed.
4/18/2019	1606489259	There is no mention of climate change and renewable energy.
4/18/2019	1606489228	Less development And no synthetic grass for our ovals
4/18/2019	1606489172	Beach and estuary environment maintain for community benefit
4/18/2019	1606489009	It would be nice to see the draft proposal behind these questions.
4/18/2019	1606488929	Too much time and. Money is wasted on consulting people that are not expert. Get the experts to give their advice and decide on that.
4/18/2019	1606484459	Please plant some trees on Forestway. Also put electricity wires underground on Frenchs Forest road
4/17/2019	1606476084	I am strongly opposed to the tunnel, especially since the plan is for no public transport using it
04/16/2019	1606475143	Don't let the Northern Beaches Tunnel destroy the Suburbs of Balgowlah, North Balgowlah, Seaforth and Manly Vale. They are as important as the rest of the Northern Beaches.
4/16/2019	1606474712	I commend the process.
4/16/2019	1606474664	N Beaches natural beauty paramount, CC*NB driving decisions population ergo housing,work transport infrastructure
4/16/2019	1606474694	No 56 wifi
4/16/2019	1606474588	I strongly oppose the implementation of 5G due to the health and environmental risk especially with no real testing. Please do NOT implement this here. Please I am begging you from my heart, think of the health of those that live here, including you
04/16/2019	1606474535	the questions are very vague and therefore, difficult to answer if it is the intetion of the council to use the survey to soley develop the strategy without further explanation, the strategy will fallfro day one.
04/16/2019	1606474525	You may have picked up that I am strongly against the roll-out of 5G. There are many factual articles relating to the safety concerns of this technology. Many international cities are putting a halt on the technology until further research is done. If we don't stop this now, we are potentially looking at huge health and environmental issues by the time 2040 comes around. Let's stop this by not exposing us to this harmful radiation for the next 21 years when we look back and what went wrong. Let's make 2019 the year that makes 2040 as safe for the community as we can.

LSPS Draft Priorities - PRIMARY

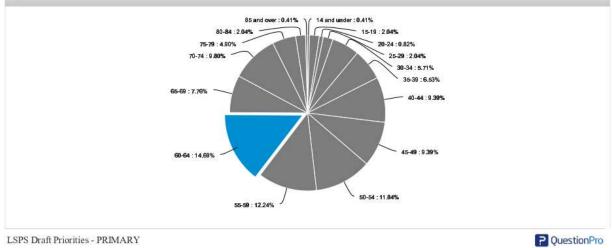


04/16/2019	1606474465	Much more needs to be done so that local residents have facilities, including better and more diverse sporting facilities and green space. Less
		emphasis on tourism which does little to benefit local residents and ratepayers. Businesses which benefit from tourism, such as chain stores and McDonalds do not contribute sufficiently to repairing the damage that is caused by their businesses. This should not be the burden of local residents. Council should do much more to enhance the green space, such as planting more trees in residential areas.
04/16/2019	1606474055	The survey questions state "will have" which is the ideal and the ideal that I support strongly in every case what is missing from this survey is a method of determining the priority angainst other options or against other needs. It is a survey to determine if we agree with what has been presented as an ideal There is also no indication of how the ideal will be met and at what cost, and this information will impact on the priority and opinion of the LSPS priorities
04/16/2019	1606469456	No 5G IIII
04/16/2019	1606468509	Focus on areas with government ownership and major land owners eg bus depot. Westfield, redevelop of commuter car park. Identify quick wins eg stree tree planting, but also develop vision to create a great place not a sewer for cars. Develop options for high quality public transport to a suport transition a series a livable mixed use centres. Focus new develop adjacent to opens pace to improve amenity but also increase passive surielance eg warringag golf course
04/16/2019	1606468314	THE ONE THING THAT WILL DO THE MOST DAMAGE TO THE MOST PEOPLE AND ENVIRONMENT IN THE NORTHERN BEACHES IS THE ROLL OUT OF 5G - WE REFUSE TO BE A HUMAN EXPERIMENT
04/16/2019	1606467824	No
04/16/2019	1606467823	Northern Beaches Council is doing a wonderful job and i'm sure this will continue. I love the Northern beaches but a few key aspects for the future include: -East west B line -Northern beaches Tunnel -High rise at Frenchs Forest within a wider zone around the hospital -Greater densification of Manly Vale -More Soccer fields and leisure space -Continual renewal of Dee Why and Brookvale -Revamp of Brookvale Oval.
04/16/2019	1606467391	More discussion is needed with the community and stakeholders. At the moment you have a list of priorities which are ALL important. Its simply not realistic to achieve everything. What is the process for determining that one priority is more important than another, and it may not be the same across projects in different areas or at different times. Satisfaction of a priority in one area, may mean elevation of another priority in that same area on the next project.

Gender



Age





Answer	Count	Percent	20%	40%	60%	80%	100%
14 and under	3	0.41%	1				
15-19	5	2.04%	=				
26-24	2	0.82%	1				
25-29	5	2.04%					
30-34	14	5.71%	-				
35-39	16	6.53%	-				
40-44	23	9.39%					
45-49	23	9.39%					
50-54	29	11.84%					
55-59	30	12.24%					
60-64	36	14,69%	J				
65-69	19	7.76%	-				
70-74	24	9.8%					
75-79	12	49%	-				
80-84	5	2.04%					
85 and over	1	0.41%	1				
Total	245	100 %					

Postcode

Betrose, New South Wales, AU (2085) : 3.67%	/ LOVETT BAY, NSW (2105) : 4.90%
Forestville, New South Wales, AU (2087) : 2.04%	AVALON, NSW (2107) : 9.80%
COLLAROY, NSW (2097) : 6.53%	
SEAFORTH, NSW (2092) : 1.63%	
EAST RYDE, NSW (2113) : 0.41%	MONA VALE, NSW (2103): 4.90%
TERREY HILLS, NSW (2084) : 0.82%	WATERLOO, NSW (2017) : 0.41%
MANLY EAST, NSW (2095) : 4.90%	FLYERS CREEK, NSW (2798) : 0.41%
ALLAMBIE HEIGHTS, NSW (2100) : 6.12%	FAIRLIGHT, NSW (2094) : 2.45%
	ROSELANDS, NSW (2196) : 0.41%
FRENCHS FOREST, NSW (2086) : 3.67%	Warriewood, New South Wales, AU (2102) : 4.08%
	COASTERS RETREAT, NSW (2108) : 0.82%
Freshwater, New South Wales, AU (2096) : 5.31%	CROMER, NSW (2099) : 7.76%
NARRABEEN, NSW (2101) : 7.76%	Bayview, New South Wales, AU (2104) : 1,63%
	Newport, New South Wales, AU (2106) : 8.98%
MANLY VALE, NSW (2093): 10.61%	

Answer	Count	Percent	20%	40%	60%	80%	100%
LOVETT BAY, NSW (2105)	12	4.9%	-				
AVALON, NSW (2107)	24	9.8%					
MONA VALE, NSW (2103)	12	4.9%	-				
WATERLOO, NSW (2017)	1	0.41%	L				
FLYERS CREEK, NSW (2798)	1	0.41%	1				
FAIRLIGHT, NSW (2094)	6	2.45%					
ROSELANDS, NSW (2196)	1	0.41%	L				
Warriewood, New South Wales, AU (2102)	10	4.08%	-				
COASTERS RETREAT, NSW (2108)	2	0.82%	1				
CROMER, NSW (2099)	19	7.76%	-				
Bayview, New South Wales, AU (2104)	4	163%	1				
Newport, New South Wales, AU (2106)	22	8.98%	-				
MANLY VALE, NSW (2093)	26	10.61%					
NARRABEEN, NSW (2101)	19	7.76%	-				
Freshwater, New South Wales, AU (2096)	13	5.31%	-				

LSPS Draft Priorities - PRIMARY



Total	245	100 %	
Belrose, New South Wales, AU (2085)	9	3.67%	-
Forestville, New South Wales, AU (2087)	5	2.04%	
COLLAROY, NSW (2097)	16	6.53%	-
SEAFORTH, NSW (2092)	4	1.63%	I
EAST RYDE, NSW (2113)	1	0.41%	I
TERREY HILLS, NSW (2084)	2	0.8.2%	L
MANLY EAST, NSW (2095)	12	4.9%	-
ALLAMBIE HEIGHTS, NSW (2100)	15	6.12%	-
FRENCHS FOREST, NSW (2086)	9	3.67%	-

