

# Productivity





## 3 - Productivity

### 30 Minute City



#### Ku-ring-gai Local Planning Priorities

**K21. Prioritising new development and housing in locations that enable 30 minute access to key strategic centres**

**K22. Providing improved and expanded district and regional connections through a range of integrated transport and infrastructure to enable effective movement to, from and within Ku-ring-gai**

#### BACKGROUND

Ku-ring-gai is characterised by a number of Local Centres and villages along the North Shore railway line, supplemented by neighbourhood centres. It is therefore important for land use planning to allow for a mix of land uses at attractor nodes to reduce the amount of trips people need to undertake in order to access public transport, and local services and amenities. The location of a variety of land uses (residential, retail, employment, open space, community facilities etc.) within walking or cycling distance encourages public transport usage and active transport modes, and can help to minimise private car use. In the context of the integration of land use and transport, the Ku-ring-gai Integrated Transport Strategy acknowledges that:

- in order to provide convenient transport choices that are an alternate to private vehicle use, increased dwelling and employment densities should be focused on public transport nodes;
- focusing dwelling and employment development within good access to public transport supports existing public transport infrastructure with increased patronage opportunities; and
- increased development in close proximity to public transport nodes can also encourage further development eg. retail and services that can increase activity and vitality of areas.

The Ku-ring-gai LGA is notable in that it does not contain a strategic (or metropolitan) centre, so residents need to leave the LGA to access their nearest strategic centre. Strategic centres to the south and north are relatively well serviced from Ku-ring-gai by rail, but by comparison strategic centres east and west are poorly serviced from Ku-ring-gai by public transport.

Convenient access to all-day frequent public transport in Ku-ring-gai is limited to areas around rail stations, and some road corridors where bus services are frequent.

Access to all-day frequent transport is critical in enabling 30 minute access to key strategic centres located in surrounding LGAs, not only for journeys to work, but for other purpose trips such as shopping, recreation, leisure and education.

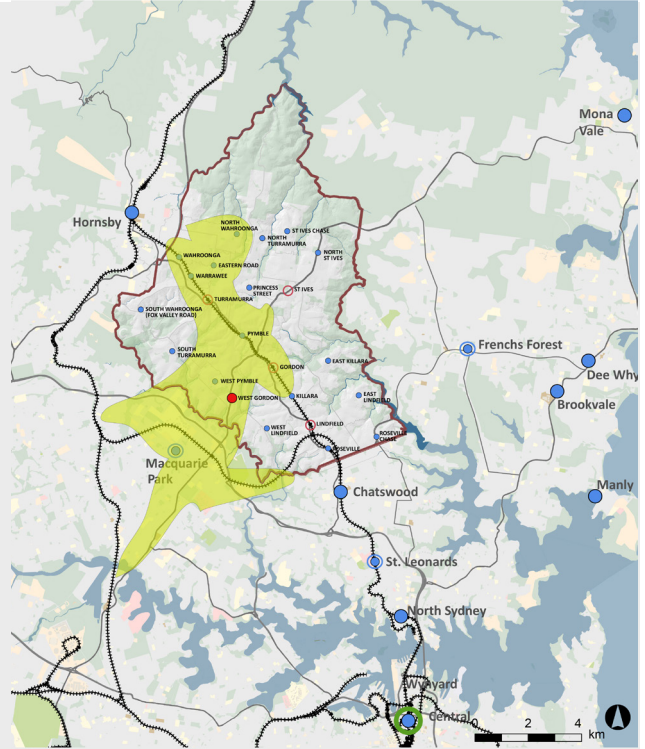
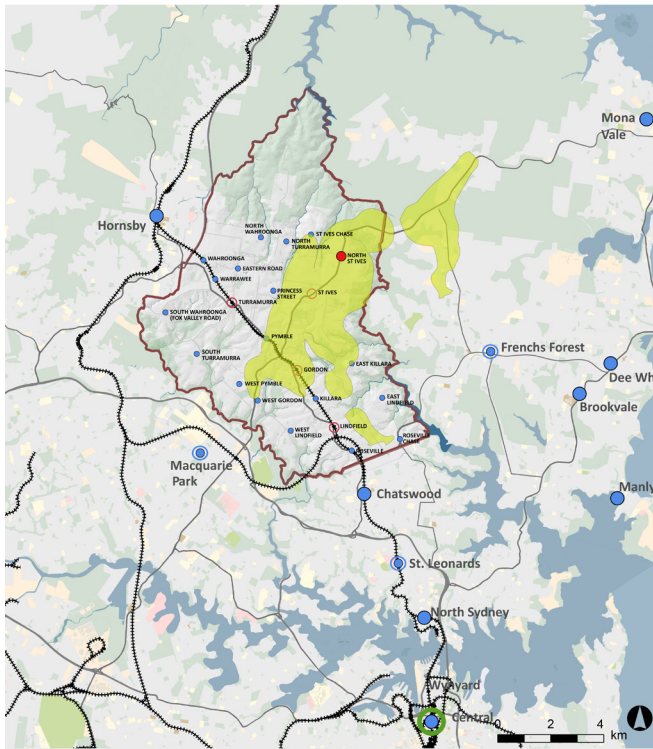
Some local and neighbourhood centres in Ku-ring-gai are more advantaged than others due to:

- access to a greater number of jobs, strategic centres and other facilities by virtue of their spatial location within the LGA;
- the level of public transport available; and
- the number and proximity of key strategic centres to them.

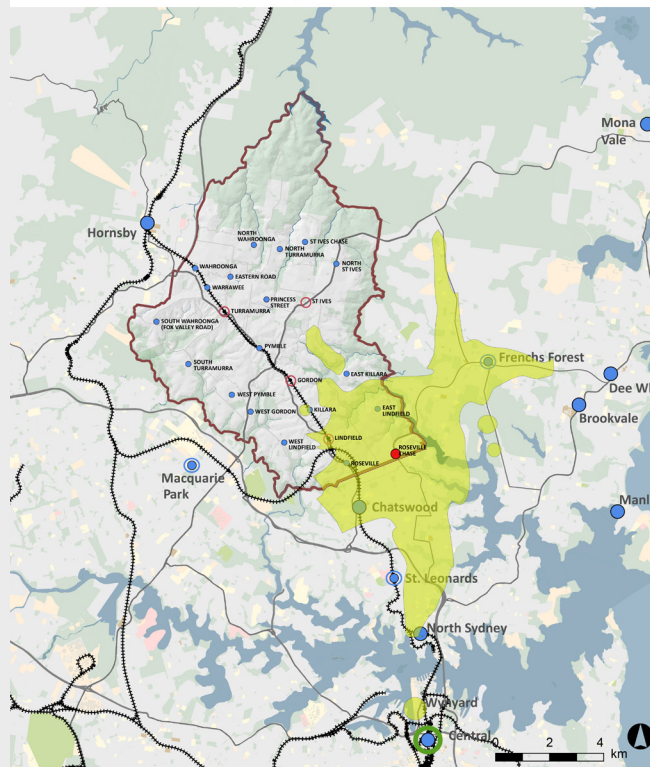
This includes the neighbourhood centres on, or adjacent, to the arterial road network such as Roseville Chase, North St Ives and West Gordon (Refer to Figure 3-1 Mobility Map– (St Ives North, West Gordon, Roseville Chase)) which are all within 30 minutes travel of a Strategic Centre.

Mobility - North St Ives

Mobility - West Gordon



Mobility - Roseville Chase



## Legend

- |                 |                               |  |
|-----------------|-------------------------------|--|
| Railway Station | Metropolitan Centre           | National Parks, Nature Reserves and Open Spaces            |
| Railway         | Health and Education Precinct | Distance traveled within 30 minutes using Public Transport |
| Arterial Road   | Strategic Centres             |  |
| Waterbody       | Local Centres                 |  |
| Waterway        | Neighbourhood Centres         |  |

Figure 3-1 Mobility Map (St Ives North, West Gordon, Roseville Chase)

## MOVEMENT TO AND FROM KU-RING-GAI

The North District Plan envisages the long term jobs capacity of Macquarie Park to be the next largest centre after the City of Sydney and North Sydney. Macquarie Park is well serviced by public transport for trips to work with origins to the north (heavy rail), north-west (NW Metro), and south/south-east (heavy rail/NW metro). However, Journey to work (JTW) data indicates that approximately one third of journey to work trips originate north-east and south-west of Macquarie Park. Of the trips from Ku-ring-gai/Northern Beaches to Macquarie Park, between 77% and 87% are by car, and between 8% and 11% are by train or bus. This is due to public transport links being substantially weaker and less reliable, due to bus services which are impacted by peak hour traffic congestion on key arterial and regional road corridors in Ku-ring-gai.

Traffic volumes on Ryde Road on the northern approach to Macquarie Park have been steadily increasing (including the proportion of heavy vehicles) and now exceed 30,000 vehicles in each direction. The majority of passenger vehicles in peak periods are single-occupant vehicles. During mornings, afternoons and evenings, significant congestion results on the corridor as the capacity is exceeded. It is not unusual to experience trip times greater than 30 minutes to travel the 4.5km on the A3 corridor (up to as late as 10am) between the Pacific Highway and Waterloo Road, which impacts on both productivity and liveability. Clearly there is a need to review the allocation of road space on the A3 corridor in the North District, to make provision for more efficient modes of transport so that the future productivity and liveability of the Macquarie Park strategic centre and the North District can be maintained and improved.

## MOVEMENT WITHIN KU-RING-GAI

According to 2016 ABS Census data, of the 30,173 people who work in Ku-ring-gai Council area, 13,394 or 44.4% also live in the area. This indicates a high degree of mobility within the LGA. Apart from along the rail corridor and some road corridors that have frequent bus services, intra-LGA travel by public transport is not convenient or frequent enough to encourage its use.

On average over the Sydney Trains network, the proportion of rail passengers who drive a car to the rail station is typically about 10%. However, at five Ku-ring-gai LGA rail stations the overall proportion of car drivers surveyed was 35% which is significantly higher than the average for the Sydney Trains network. This indicates a high degree of dependence on car travel for access to the rail station. Demand for

dedicated commuter parking around railway stations in the LGA exceeds the supply. This results in commuters parking on-street around railway stations, sometimes as far as 800m away. For example, in Gordon, there are approximately 700 dedicated commuter parking spaces, but the demand is for nearly double that number.

## STRATEGIC RESPONSE

A review of the Ku-ring-gai Integrated Transport Strategy is necessary so that there is alignment with Future Transport 2056 and the North District Plan. To help inform the housing local planning priority, the review would include analysis of travel times by public transport from Ku-ring-gai suburbs to strategic centres in the Eastern Economic Corridor, considering the transport improvements identified in Future Transport 2056. As part of the review, the Ku-ring-gai Integrated Transport Strategy should also develop mode share/mode split targets for Local Centres, with priority for walking, cycling and public transport, to increase proportion of trips to Local Centres by modes other than private car.

Implementation of public transport improvements identified in Future Transport 2056 (both committed, and those initiatives for investigation), particularly serving the east-west direction and cross-regional links, could expand the locations in Ku-ring-gai that could provide convenient access to all-day frequent public transport, and could therefore improve local and neighbourhood centres access to a greater number of jobs and strategic centres. From this, improving local connections to these local and neighbourhood centres is also critical in maximising the opportunities available within 30 minutes by public transport. Figure 3-2 Strategic Road and Rail Network outlines the key public transport improvements identified in Future Transport 2056 which impact on Ku-ring-gai.

### ► Movement to and from Ku-ring-gai

The Road Network Plan for the Lane Cove Road Corridor (RMS, 2018) acknowledges that one of the key issues and highest priorities is that

“Traffic performance may worsen and poor performance may extend beyond existing peak periods as traffic demand increases with the growth of Macquarie Park and other centres surrounding the corridor.

Investigations and investments in alternative travel options (public and active transport) and parking provision are





#### ► Movement to and from Ku-ring-gai (cont.)

required to change travel behaviour. Without this, heavy reliance on private vehicles will worsen traffic performance along this corridor.”

Following this, the opportunities identified in the Road Network Plan include developing an integrated transport strategy, rather than infrastructure solutions, to enhance the efficiency of the corridor. By strengthening the existing east-west transport links (Dee Why to Chatswood and Mona Vale to Macquarie Park), followed by true Rapid Bus Transit, these strategies would form part of an integrated solution to improve the efficiency of the corridor. This would also align with the four corridor vision for Northern Beaches Council - to transform from one strategic bus corridor (B-Line) to four public transport corridors in and out of the Northern Beaches LGA, particularly to areas to the west.

Council acknowledges the role of freight and servicing to productivity and the local economy. Within Ku-ring-gai, the Pacific Highway and Mona Vale Road are key arterial roads and freight movement corridors. The Transport for NSW Road Network Plan for Pacific Highway identifies NorthConnex as the preferred route for traffic and freight between M2 Motorway and M1 Motorway, with scope of reducing pressure on the Pacific Highway corridor. Council would like to work with Transport for NSW to encourage through traffic to the preferred route, in order to reduce impacts to local centres resulting from heavy and other vehicles passing through local centres on the Pacific Highway.

Updated requirements for supply chains and freight/servicing activities will be included in the DCP, including careful consideration of access points in the context of the Movement and Place framework.

In order to complete the access upgrades of stations in Ku-ring-gai, Council will continue to advocate for the upgrade to Killara railway station.

#### ► Movement within Ku-ring-gai

Key bus routes and corridors have been identified for service and infrastructure improvement, to encourage public transport use within the LGA. This would create more of a network of local routes with better connections to Local Centres and neighbourhood centres (figure 3-3 Public Transport Network).

There is also justification for the implementation of an on-demand bus service in the LGA, as an in-fill service to areas not well serviced by existing bus services. A trial service currently operating in the Sutherland Shire has similar characteristics to a potential service in the Ku-ring-gai LGA, in that:

- there is an existing rail corridor and stations along a spine;
- a number of Local Centres are located around railway stations, with retail, medical and other services;
- the area is predominantly characterised by low density residential, with more dense development located around rail stations and along the rail corridor;
- there is a major hospital precinct located outside the Local Centres and away from rail station access;
- there are a number of educational, recreational and aged care facilities also outside the Local Centres and away from rail station access; and
- the number of dwellings without access to a frequent all-day public transport is high.



## 30 Minute City - Ku-ring-gai Local Planning Priorities and Actions

Ku-ring-gai Council	<b>Ku-ring-gai Local Planning Priorities</b>
	<b>K21. Prioritising new development and housing in locations that enable 30 minute access to key strategic centres</b>
	<b>K22. Providing improved and expanded district and regional connections through a range of integrated transport and infrastructure to enable effective movement to, from and within Ku-ring-gai</b>  <b>Actions</b> <ul style="list-style-type: none"> <li>Review Integrated Transport Strategy to align with Future Transport 2056, and include: <ul style="list-style-type: none"> <li>analysis of travel times by public transport from Ku-ring-gai suburbs to strategic centres in the Eastern Economic Corridor considering the transport improvements identified in Future Transport 2056; and</li> <li>development of mode share targets for the Local Centres (short term).</li> </ul> </li> <li>Advocate to Transport for NSW to increase priority and accelerate the delivery of infrastructure improvements identified in Future Transport 2056 that connects Ku-ring-gai internally and with nearby centres, including: <ul style="list-style-type: none"> <li>improvements to bus connections from Mona Vale to Macquarie Park, and Dee Why to Chatswood (followed by Bus Rapid Transit);</li> <li>implementation of access upgrade to Killara railway station;</li> <li>improvements to access to public transport, comprising of (but not limited to) more frequent and direct bus services to stations, improvements to key local bus corridors, introduction of on-demand bus services and additional commuter parking, where appropriate (short term - ongoing).</li> </ul> </li> <li>Council to work with TfNSW to support and implement travel behaviour change programs to help manage demand on the transport network, including by requiring new developments and businesses operating in key precincts to develop and implement travel plans to encourage the use of sustainable transport choices' (ongoing).</li> </ul>
<b>North District Plan</b>	<b>Planning Priority N12</b>  Delivering integrated land use and transport planning and a 30 minute city
<b>Greater Sydney Region Plan</b>	<b>Objective 12</b>  A Metropolis of Three Cities – integrated land use and transport creates walkable and 30 minute cities

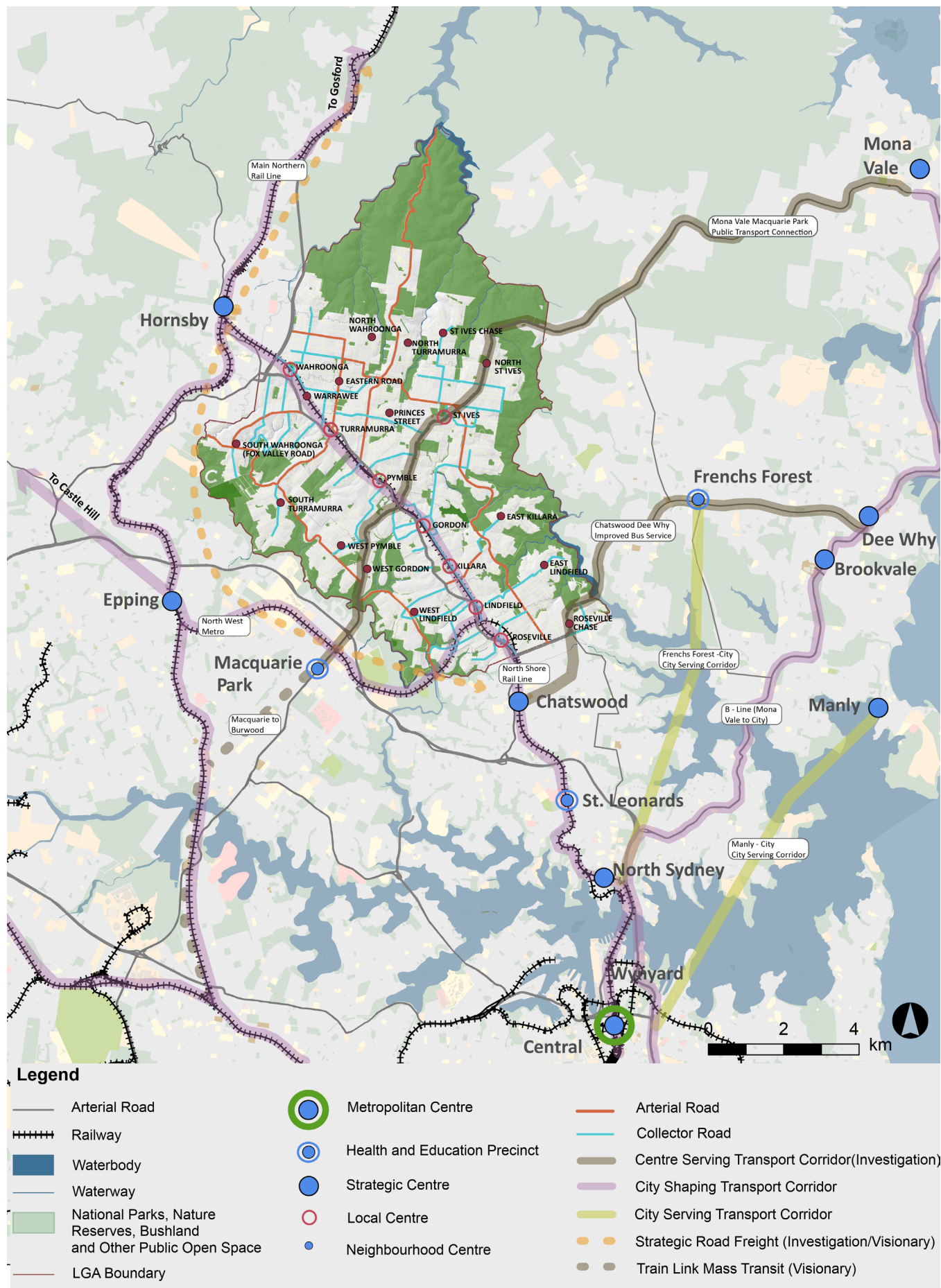


Figure 3-2 Strategic Road and Rail Network



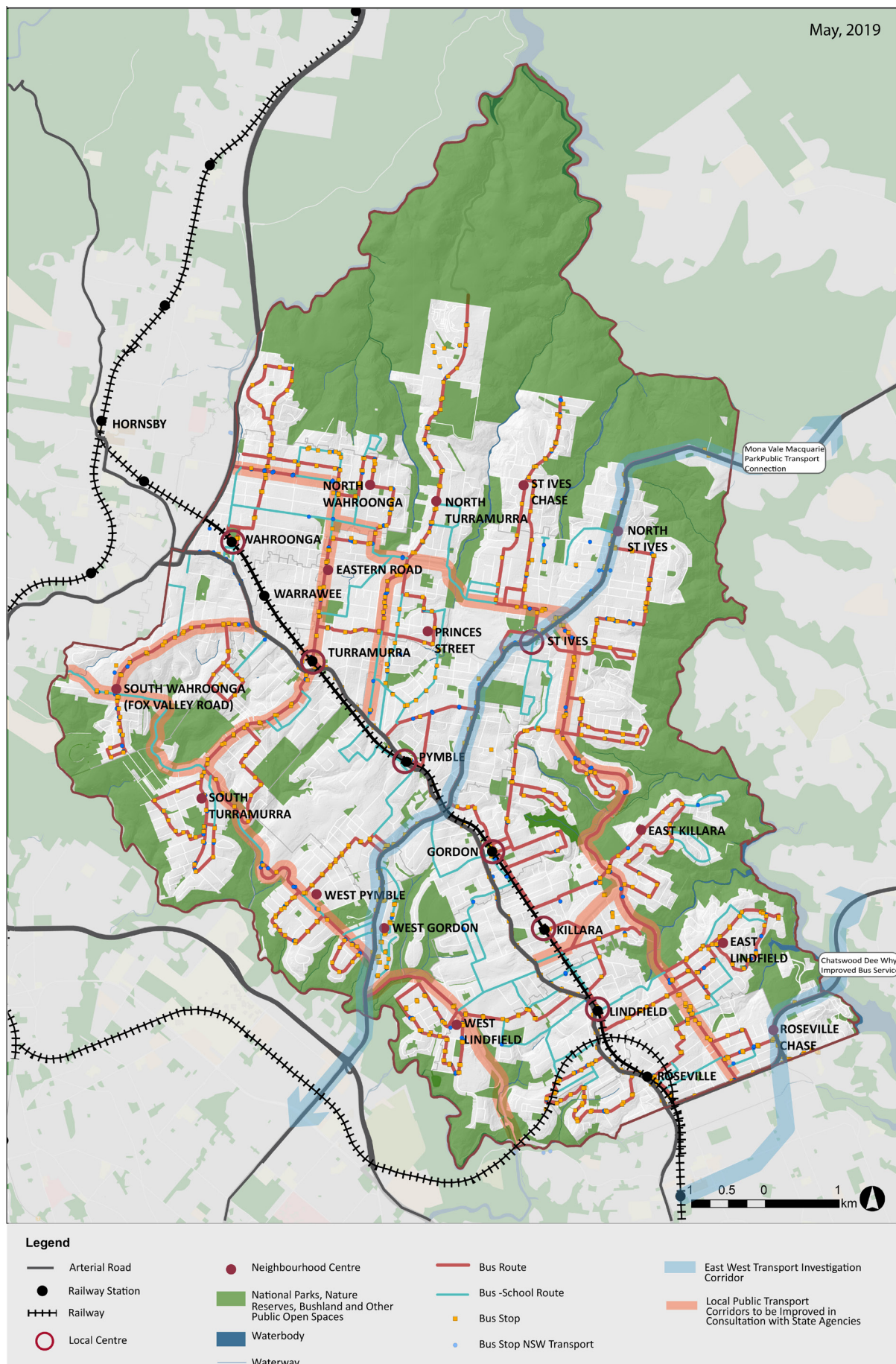


Figure 3-3 Public Transport Network

## Active Transport - Walking and Cycling Networks

### Ku-ring-gai Local Planning Priorities

#### K23. Providing safe and convenient walking and cycling networks within Ku-ring-gai

### BACKGROUND

The Ku-ring-gai Integrated Transport Strategy recognises that communities and Local Centres with walking and cycling at the forefront of design provide attractive and liveable areas with high levels of street activity, improved safety and a high quality of environment. Walkable and cycleable environments facilitate greater public transport use and also contribute to healthy communities through the encouragement of physical activity. One of the Strategy's objectives was to increase cycling mode share of bicycle trips to 5% by 2016.

### WALKING

Walking is a fundamental and direct means of access to most places and to the goods, services and information available at those places. Those creating public and private space or facilities must give priority to 'walk in' access which is attractive, safe, convenient and accessible for everyone. All responsible agencies should respect the pedestrians' priority right-of-way on footpaths and recognise the importance of constructing and maintaining them for transport, health, safety, leisure and social purposes.

Council has undertaken a review of the current pedestrian needs in the Ku-ring-gai LGA with the aim of providing a consistent standard of facilities for pedestrians. The review provided a list of prioritised pedestrian infrastructure improvements for safer, more attractive transport choices for residents and visitors, to increase pedestrian activity and to improve the amenity for all local residents and visitors to the LGA. The specific objectives of the review were to:

- increase the use of the pedestrian network for short trips (1.5-2km);
- reduce the number of missing links within the pedestrian network;
- reduce the number of pedestrian accidents;
- improve pedestrian connectivity with other transport modes, primarily train, bus, bicycle and car;
- provide pedestrian facilities which cater for the needs of all pedestrians, including people with disabilities, commuters, children, seniors and recreational walkers; and
- complement existing and planned pedestrian and bicycle facilities.

This review focused on the existing and proposed pedestrian network with the aim of extending and improving the existing network of pedestrian facilities. Recommendations from the review are included in a Draft Pedestrian Access and Mobility Plan (PAMP) to be completed in 2019/2020.

### CYCLING

In 2016, 0.6% of Ku-ring-gai Council area's employed population travelled to work by bicycle (at any stage of their journey), compared to 0.7% in Greater Sydney. This is despite modest provision of cycling facilities in the LGA. While Ku-ring-gai had a lower proportion of people who cycled to work, this varied across the LGA. For example, proportions ranged from a low of 0.1% in St Ives to a high of 1.7% in South Turramurra.

The Ku-ring-gai Bike Plan was adopted by Council in 2012. Objectives of the Bike Plan include reducing the number of missing links and severance within the existing bicycle network, and improving the connectivity of the cycle network with other transport modes, primarily bus, train and walking. Since adoption of the Bike Plan, modest progress has been made in implementing a south-to-north route (roughly parallel to the Pacific Highway) from Roseville to Wahroonga. Planning is also underway for local cycling links to some of Council's new major project sites in Lindfield and Turramurra.

Community awareness and expectations in terms of the quality and safety of cycling facilities for all ages and riding abilities have increased since the adoption of the Bike Plan, with the community desire now for separated cycling facilities, which come at a higher cost than the facilities anticipated in the Bike Plan. Except on quiet, low traffic local roads, on-road/mixed traffic cycleways are not considered adequate for cycling. Providing separated cycling facilities through residential areas and Local Centres often involves impacts to on-street parking, which can present challenges in their development.



## STRATEGIC RESPONSE

As indicated in the local planning priorities for a 30 minute city, the review of the Ku-ring-gai Integrated Transport Strategy would incorporate the development of mode share/ mode split targets for Local Centres, with priority for walking, cycling and public transport. This would provide the strategic justification to increase proportion of trips to Local Centres by modes other than private car, including active transport.

better integration of cycling in the Local Centres needs to be achieved; therefore cycling facilities need to be incorporated in the review of the Public Domain Plans for the Local Centres. Figure 3-4 Active Transport – Cycle Routes outlines the Greater Sydney Principal Bicycle Network, Council's existing bicycle network, and additional routes for investigation.

### WALKING

The North District Plan discusses the principle that direct, safe and accessible routes to local destinations and services should be prioritised within a 10 minute walk of centres. To help achieve this, opportunities identified in the PAMP would need to be incorporated in the review of the Public Domain Plans for the Local Centres.

### CYCLING

The Greater Sydney Principal Bicycle Network (as part of Future Transport 2056) suggests a network of major bike corridors linking strategic centres across Greater Sydney. In addition to this, the individual components of the Principal Bicycle Network have an important role in supporting shorter distance city-serving and centre-serving journeys.

The Green Grid provides preliminary prioritisation of opportunities in terms of their strategic potential as catalysts for the establishment of a new interconnected high performance green infrastructure network which will support healthy urban growth. The Green Grid is discussed in more detail within Section 4 – Sustainability – Green Grid, Planning Priorities K32, K33 and K34.

The Ku-ring-gai Bike Plan was developed to connect local activity generators and attractors, such as transport nodes, schools, shops and recreation facilities, as well as providing regional connectivity

In order to better align with State Government plans, a review and update of the Bike Plan will be undertaken in conjunction with the Green Grid Strategy (see Planning Priorities K32, K33 and K34) to integrate with new opportunities in Local Centres, local and Sydney Green Grid connections and regional opportunities and connections as addressed within the Principal Bicycle Network and other active transport provisions in Future Transport 2056. In addition to this,







## Active Transport - Walking and Cycling Networks - Ku-ring-gai Local Planning Priority and Actions

<b>Ku-ring-gai Council</b>	<b>Ku-ring-gai Local Planning Priority</b> <b>K23. Providing safe and convenient walking and cycling networks within Ku-ring-gai</b>
	<b>Actions</b> <ul style="list-style-type: none"> <li>• Review and update the Ku-ring-gai Bike Plan, to align with the Principal Bicycle Network and other active transport provisions in Future Transport 2056, as well as new opportunities identified in the Green Grid Strategy and in the Local Centres (short-medium term).</li> <li>• Incorporate cycling and pedestrian facilities in the review of the Public Domain Plans for the Local Centres (short-medium term).</li> <li>• Update mode share for cycling in the review of the Ku-ring-gai Integrated Transport Strategy, to include mode share/mode split targets for Local Centres (short-medium term).</li> <li>• Complete Pedestrian Access and Mobility Plan (short term).</li> <li>• Investigate additional walking and cycling routes from neighbourhood centres and surrounding areas to the Local Centres and train stations, as part of the review of the Ku-ring-gai Integrated Transport Strategy (short-medium term).</li> </ul>
<b>North District Plan</b>	<b>Planning Priority N12</b> Delivering integrated land use and transport planning and a 30 minute city
<b>Greater Sydney Region Plan</b>	<b>Objective 14</b> A Metropolis of Three Cities – integrated land use and transport creates walkable and 30 minute cities

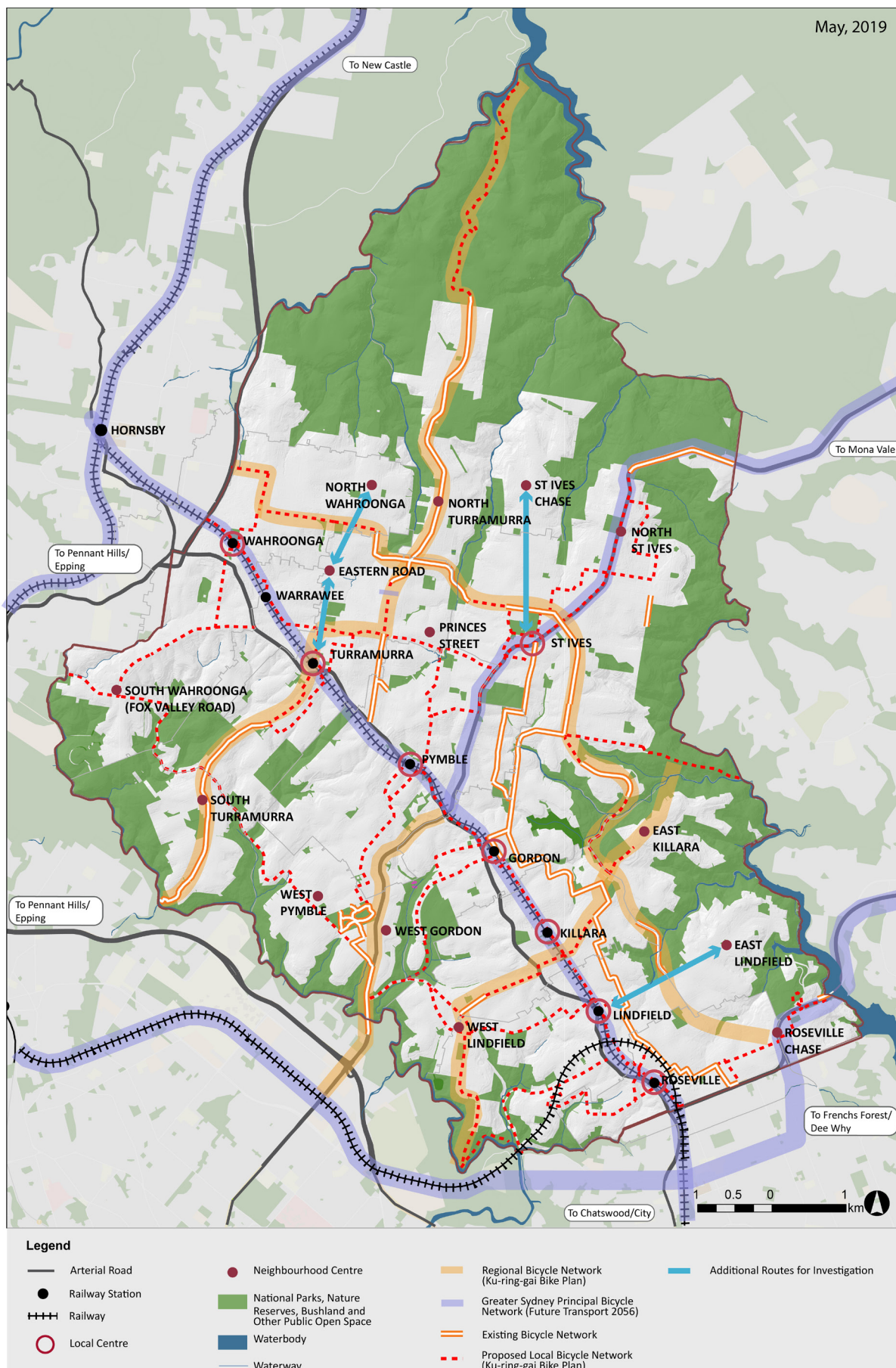


Figure 3-4 Active Transport - Cycle Routes



# Local Economy and Employment

## TOURISM

### Ku-ring-gai Local Planning Priority

#### K24. Diversifying Ku-ring-gai's local economy through the expansion of tourism and the local visitor economy

## BACKGROUND

Ku-ring-gai does not currently have a recognised tourism profile in Sydney for domestic, international, overnight or day trip visitors. Ku-ring-gai currently receives only 344,000 visitors per annum<sup>12</sup> which is approximately 1% of the 33.8 million visitors to Sydney.

Key findings from the community engagement undertaken in 2017 for the review of the Community Strategic Plan – Our Ku-ring-gai 2038 identified that Ku-ring-gai's status as a nature destination could be improved; and tourist and visitation offerings based on aboriginal heritage, historical heritage, St Ives Showground, and the Marian Street Theatre could be expanded.

Council adopted the Ku-ring-gai Destination Management Plan 2017-2020 in July 2017 to plan for the sustainable management, development and marketing of tourism in Ku-ring-gai. The Plan focuses on the potential of the St Ives Showground Precinct (consisting of three adjoining sites being the Wildflower Garden, the Showground and the former plant nursery) as a tourism destination and the main opportunity to grow Ku-ring-gai's tourism and local visitor economy, as shown in Figure 3-10 Local Economy and Employment.

## STRATEGIC RESPONSE

Ku-ring-gai has significant opportunities to capitalise on its strategic location in Sydney, and to further develop and enhance its tourism and local visitor economy.

The key tourism opportunities within Ku-ring-gai include:

- the St Ives Showground Precinct;
  - Festivals and events, such as the Medieval Faire;
  - Nature based; and
  - Aboriginal culture and heritage.
- architectural heritage and culture such as Rose Seidler House;
- recreational and leisure activities; and
- hospitality and retail.

Challenges to further diversifying the local economy of Ku-ring-gai through the expansion of tourism and the local visitor economy include:

- limited visitor accommodation;
- the need to attract quality and complementary tourism and hospitality operations; and
- ensuring that the natural environment and quality of life for the local community is protected and maintained.

The Ku-ring-gai Destination Management Plan 2017-2020 provides a framework for strengthening the tourism and the local visitor economy in Ku-ring-gai by Council investing in strategic planning and development of the St Ives Precinct as an important centre for events, nature based and Aboriginal tourism in Sydney. The LSPS will implement the land use based actions identified in the plan in order to expand the tourism and visitor economy in Ku-ring-gai, including:

- supporting the development of new accommodation infrastructure that is in character with the area such as small scale boutique hotels or bed and breakfast in large old houses;
- ensuring opportunities for hospitality and retail operations are considered as part of strategic planning for hub projects;
- progressing the renewal and opening of Marian Street Theatre; and
- master planning for the St Ives Showground Precinct as a regional tourism and events destination.

Council is also developing a Natural Areas Recreation Strategy – relating to unstructured recreation activities such as walking, jogging, rock climbing, abseiling, mountain biking and orienteering within Council's bushland, which will help to further develop Ku-ring-gai's recreation and leisure experiences, support tourism and the local visitor economy. The Natural Areas Recreation Strategy is discussed further under Planning Priorities K17, K18 and K19.

<sup>12</sup> Estimate 2016 – Tourism Research Australia, YE June 216, STA2 areas: Wahroonga/Warrawee, Turrumurra, St Ives, Pymble, Lindfield/Roseville, Gordon/Killara

## Tourism - Ku-ring-gai Local Planning Priority and Actions

Ku-ring-gai Council	<b>Ku-ring-gai Local Planning Priority</b> <b>K24. Diversifying Ku-ring-gai's local economy through the expansion of tourism and visitor economy</b>
	<b>Actions</b> <ul style="list-style-type: none"> <li>• Implement land use based actions from the adopted Ku-ring-gai Destination Management Plan 2017-2020 including: <ul style="list-style-type: none"> <li>- Support sustainable development of new accommodation infrastructure to stimulate overnight visitor stays by reviewing development control and land use policies to identify suitable locations and encourage the establishment of these facilities (medium term).</li> <li>- Ensure opportunities for the establishment of high quality hospitality and retail operations that are attractive to visitors, and are considered as part of strategic planning for Lindfield, Gordon and Turramurra Hub projects (ongoing).</li> <li>- Progress renewal and opening of Marian Street Theatre (short-medium term).</li> <li>- Preparation of revised master plan for St Ives Showground Precinct as a regional tourism and events destination (ongoing).</li> </ul> </li> </ul>
North District Plan	<b>Planning Priority N13</b> Supporting growth of targeted industry sectors
Greater Sydney Region Plan	<b>Objective 24</b> Economic sectors are targeted for success



## RETAIL AND COMMERCIAL CENTRES

### Ku-ring-gai Local Planning Priority

#### K25. Providing for the retail and commercial needs of the local community within Ku-ring-gai's centres

## BACKGROUND

Ku-ring-gai's centres comprise of the Primary Local Centres of Lindfield, Gordon, Turramurra and St Ives and the Secondary Local Centres of Wahroonga, Pymble, Killara and Roseville. All these centres play a vital role in the local economy and provide a diverse mix of office, retail, support services, community facilities and transport connections. Additionally, Ku-ring-gai has a number of smaller Neighbourhood Centres scattered throughout the local government area. These Neighbourhood Centres are generally comprised of a small cluster of strip retailing and commercial businesses that provide top up convenience shopping to the immediate surrounding residential areas.

Key findings from the community engagement undertaken in 2017 for the review of Community Strategic Plan – Our Ku-ring-gai 2038 found that the Local Centres could be enhanced for economic growth, and there are opportunities to increase after-hours businesses and a night time economy within Ku-ring-gai.

A Retail Centres Study was undertaken for Ku-ring-gai in 2005 by Hill PDA which analysed forecast demand for retail space and commercial services within centres, assessed the centre's function and performance and provided priorities for planning the future direction, role and function of the centres for the benefit of local businesses and residents.

The study found a significant undersupply of retail floor space within Ku-ring-gai. Due to the undersupply, Ku-ring-gai is losing more than 40% of its total household expenditure, with most escape being captured by the larger strategic centres of Hornsby, Macquarie, Chatswood and Sydney CBD.

It is estimated that Ku-ring-gai currently provides 116,000sqm of retail floor space<sup>13</sup>. This is a very low provision of retail floor space given the total population of Ku-ring-gai. The retail floor space provision within Ku-ring-gai is currently estimated at 0.94sqm/capita, which when compared to the Sydney Metropolitan average of 2.35sqm/capita<sup>13</sup> is a very low provision.

Additionally, the provision of supermarkets in Ku-ring-gai is also much lower than the Sydney Metropolitan average, as shown in Figure 3-5 below:

Average supermarket store provision (persons per store)	
Sydney Metropolitan	11,165 persons per store
Ku-ring-gai	20,000 persons per store

Source: Deep End Services Pty Ltd, 2016, Sydney Retail Demand and Supply Consultancy Stage 1, 2 and 3 reports

Figure 3-5 Average Supermarket Store Provision (Persons per Store)

## STRATEGIC RESPONSE

Based on the retail floor space projections provided in the Sydney Retail Demand and Supply Report, Deep End Services 2016, it is estimated that Ku-ring-gai will need to provide an additional 38,000sqm-46,000sqm of retail floor space over the next 20 years to meet the retail demands of the growing population.

The estimated additional retail supply for Ku-ring-gai will be further refined within a Retail/Commercial Centres Strategy to be undertaken by Council in 2019. This Strategy will provide an analysis of current and future retail trends and drivers, commercial land use patterns, and changes in businesses. The Strategy will develop a centre's hierarchy, and identify the type and extent of future floor space needs for retail and commercial uses, and optimum locations for the additional floor space. The Strategy will also investigate opportunities for growth within centres, such as identifying complementary land uses that could be integrated into the centre to support its role and function, or promote activity.

Additionally, Activate Ku-ring-gai is a program of urban renewal and revitalisation that Council is leading in the Local Centres with the redevelopment of Council-owned land acting as a catalyst. The community hub projects in Turramurra and Lindfield are part of this program, and will help facilitate the provision of supermarkets that act as an anchor in those areas.

<sup>13</sup> Deep End Services Pty Ltd, 2016, Sydney Retail Demand and Supply Consultancy Stage 1, 2 and 3 reports





A Vibrant Touch of Ethiopia on the Streets of Turrumurra, Pacific Highway by Kay Watson





## PRINCIPLES FOR RETAIL AND COMMERCIAL CENTRES

Based on Council's policy and research completed to date, the following principles have been identified for future land use planning for retail and commercial centres.

- Protect or expand retail and commercial floor space within Local and Neighbourhood Centres.
- Strengthen the role of Local Centres with office and higher order retail land uses.
- Prohibit retailing in Pymble Business Park.
- Provide for further growth in retail space to meet demand generated by population growth.
- Contain retailing (as oppose to dispersing or spreading it) to minimise travel times, improve convenience and improve competition within retail centres.
- Housing should not compromise a centre's primary role to provide goods and services, and the opportunity for the centre's employment function to grow and change over time.
- Support a diverse night time economy.
- Protect and improve the integrity and viability of existing centres through improving convenience level, retail offer, accessibility, beautification and ambience.
- Protect integrity and viability of existing centres from threats generated by new centres, expansion of existing centres, changes in retail hierarchy and out of centre development.
- Encourage development of supermarkets in Local Centres that lack such offer.

Figure 3-6 Lindfield Local Centre

## Retail and Commercial Centres - Ku-ring-gai Local Planning Priority and Actions

Ku-ring-gai Council	<b>Ku-ring-gai Local Planning Priority</b> <b>K25. Providing for the retail and commercial needs of the local community within Ku-ring-gai's centres</b>
	<b>Actions</b> <ul style="list-style-type: none"> <li>• Prepare a Retail/Commercial Centres Strategy to align with population growth and address retail supply and demand in Ku-ring-gai, including the following: <ul style="list-style-type: none"> <li>- Establish a centres hierarchy and investigate the interrelationship between centres and their roles and functions;</li> <li>- Future demand for retail and commercial floor space in the context of population growth, demographic changes and retail trends;</li> <li>- Assessment of impact and influence of nearby strategic centres eg. Hornsby and Macquarie Park;</li> </ul> </li> <li>• Identify opportunities to support the role and function of centres, such as complementary land uses (short term).</li> <li>• Identify future planning responses to deliver the outcomes of the Retail/Commercial Centres Strategy to 2036 (short-medium term).</li> </ul>
North District Plan	<b>Planning Priority N10</b> Growing investment, business opportunities and jobs in strategic centres
Greater Sydney Region Plan	<b>Objective 22</b> Investment and business activity in centres



# Employment

## Ku-ring-gai Local Planning Priority

**K26. Fostering a strong local economy that provides future employment opportunities in Ku-ring-gai for both residents and workers within key industries**

## BACKGROUND

Ku-ring-gai's local economy consists of 14,436 local businesses<sup>14</sup> and 38,052 local jobs<sup>15</sup> which are distributed across seven local commercial centres, a business park, a major hospital precinct, public and independent educational facilities, and dispersed neighbourhood shopping centres. The arterial infrastructure within Ku-ring-gai, being the Pacific Highway and North Shore rail line, are important to the local economy - acting as a spine for economic activity, with the commercial centres scattered along. The accessibility of employment lands to this infrastructure is vital for many industries.

## KU-RING-GAI RESIDENTS – EMPLOYMENT

### ► Employment

The levels of full and part time employment and unemployment indicate the strength of the local economy and the social characteristics of the population. The employment status of Ku-ring-gai is linked to a number of factors, including age structure which influences the number of people in the workforce; the economic base and employment opportunities available in the area; and the education and skill base of the population.

In 2016, the employment status of Ku-ring-gai residents was 34,310 residents employed in full time work and 19,924 residents employed in part time work. The unemployment rate within Ku-ring-gai was 4.7%, much lower than the Greater Sydney average of 6.0% in 2016<sup>16</sup>.

### ► Education and Occupation

Educational qualifications are an important indicator for socio-economic status, economic opportunities and identifying skill gaps in the labour market. In 2016, 47.9%<sup>17</sup> of the Ku-ring-gai population aged 15 years and over were university educated.

Ku-ring-gai's occupation statistics quantify the occupations in which residents work – which may be within Ku-ring-gai or elsewhere. Professionals are by far the largest occupation group for Ku-ring-gai residents (40%), followed by managers (21%), which are significantly higher than the Greater Sydney averages, and correlates with the high levels of post school qualifications held by Ku-ring-gai residents. (See Figure 3-6)

The Ku-ring-gai and Hornsby Employment Lands Study 2008 undertaken by SGS Economic and Planning found that within Ku-ring-gai there are fewer jobs in manager and professional occupation categories than there are workers, suggesting a 'leakage' of employment, which is related to a lack of these higher order job opportunities within Ku-ring-gai. This results in 73%<sup>18</sup> of Ku-ring-gai residents leaving the area every day for work to other commercial and specialist centres, such as the Sydney CBD, Willoughby/Chatswood, North Sydney and Ryde/Macquarie Park where employment opportunities are more suited to their skills.

OCCUPATION – KU-RING-GAI RESIDENTS 2016								
	Manager	Professional	Technician	Community, personal service	Clerical	Sales worker	Machinery	Labourer
Ku-ring-gai	21%	40%	5%	7%	14%	8%	1%	3%
Greater Sydney	14%	27%	12%	10%	15%	9%	6%	8%

Source: ABS 2016 – Occupation of employed persons

Figure 3-6 Occupation – Ku-ring-gai Residents 2016

<sup>14</sup> Australian Bureau of Statistics, 2017

<sup>15</sup> Year ending 2018 - National Institute of Economic and Industry Research, 2018 (NIEIR)

<sup>16</sup> Australian Bureau of Statistics, 2016 – By usual residence

<sup>17</sup> Australian Bureau of Statistics, 2016

<sup>18</sup> Australian Bureau of Statistics, 2016 - By place of work

## INDUSTRIES AND EMPLOYMENT WITHIN KU-RING-GAI – PEOPLE WHO WORK IN KU-RING-GAI

### ► Jobs and Employment

Ku-ring-gai's workforce is made up of all the people who are employed within Ku-ring-gai, regardless of where they live.

Ku-ring-gai's local economy comprised of 38,052 local jobs in the year ending 2018. A count of jobs is one of the most fundamental economic indicators of the size of the local economy, and increasing numbers of jobs generally represents a growing economy. Figure 3.7 below shows the growth of local jobs within Ku-ring-gai since 2006 and recent trends show that between 2016 and 2018 there has been a 7.17% increase in the number of local jobs within Ku-ring-gai.

GROWTH TRENDS IN LOCAL JOBS – KU-RING-GAI		
Year	Number	% change
2018	38,052	+7.17%
2016	35,506	+1.15%
2011	35,099	+3.13%
2006	34,033	-

Source: National Institute of Economic and Industry Research 2018 (NIEIR)

Figure 3-7 Growth Trends in Local Jobs – Ku-ring-gai

### ► Industry

The industry sectors providing the highest percentage of local employment within the Ku-ring-gai economy are shown in the Figure 3.8 below:

LOCAL EMPLOYMENT BY INDUSTRY SECTOR	
Industry	% of local jobs
Health Care and Social Assistance	24%
Education and Training	19%
Professional, Scientific and Technical Services	12%
Retail Trade	9%
Construction	7%

Source: ABS 2016 – By place of work

Figure 3-8 Local Employment by Industry Sector

Health care and social assistance is the largest employer in the Ku-ring-gai Council area making up 24% of total employment. The top three industry sectors being health care and social assistance, education and training and professional, scientific and technical services. Combined, these three industries employ over 50% of local workers within Ku-ring-gai.

The Ku-ring-gai local economy has a specialisation in health and education industries, with these sectors employing large numbers of people. It is important to note that these industries result in areas of significant employment activity outside of the Local Centres and Pymble Business Park. There are several key institutions responsible for these local jobs within the health and education sectors including:

- the SAN (Sydney Adventist Hospital);
- the Lady Davidson Private Hospital;
- associated specialist medical consultation services;
- numerous private and public schools, both primary and secondary, such as Knox Grammar, Pymble Ladies College and the new Lindfield Learning Village.

Figure 3-9 Local Economy and Employment highlights these key employment industries, by identifying schools and hospitals throughout Ku-ring-gai.

### ► Local Business and Home Based Business

Ku-ring-gai's business sector is predominantly made up of small to medium size businesses.

Compared to Greater Sydney, Ku-ring-gai has one of the highest levels of home based occupation and business. In 2011, the proportion of home based businesses in Ku-ring-gai was 5%, double the Greater Sydney average of 2.5%<sup>19</sup>. Home based occupation and business results in significant employment activity in the residential areas of Ku-ring-gai, outside of Local Centres and Pymble Business Park.

Consultation undertaken by SGS Economics and Planning for the Ku-ring-gai and Hornsby Employment Lands Study 2008 with home based business operating within Ku-ring-gai, suggested that work from home is driven by the benefits of this way of working ie. lifestyle benefits such as flexibility in work hours and avoidance of commute to work, rather than a shortage of suitable business space elsewhere.

<sup>19</sup> Australian Bureau of Statistics, 2011 – methods of travel to work (residents)

## ► Specialised precincts

### CSIRO - Research and Innovation

The CSIRO (Commonwealth Scientific and Industrial Research Organisation) is Australia's national scientific research agency. The CSIRO site at Lindfield is the largest research site in Sydney, which currently employs approximately 300 researchers, who work mostly on physics and materials sciences.

CSIRO are planning to upgrade the research facilities at the Lindfield site with construction due to start in 2019 as part of the proposed Sydney Consolidation Project. This project will result in the decommissioning of CSIRO sites at Marsfield and North Ryde, with staff relocating to Lindfield. The total number of staff at the Lindfield site is expected to rise from approximately 300 to 600 by 2021. Over time, the increase in staff working at the Lindfield site is expected to bring additional research and commercial activity to the CSIRO site while enhancing local business activity and opportunities in the Lindfield area.

The CSIRO Lindfield Site also includes the Lindfield Collaboration Hub, which is an innovation incubator and dedicated space offering collaborative work spaces for start-ups and small to medium enterprises (SMEs) to develop unique, high-tech products and devices. Early stage and established companies can move to CSIRO's Lindfield campus and access the facilities, science know-how, and experience and business networks. In 2018, there were 14 companies with 190 staff as tenants as part of the Lindfield Collaboration Hub. The CSIRO is identified in figure 3-10 Local Economy and Employment as a research and innovation precinct.

### The SAN - Health and Education

Ku-ring-gai does not have any identified health or education precinct within the North District Plan; however, the Sydney Adventist Hospital (SAN), the largest private hospital in NSW and a combined health and education facility is located in Wahroonga. The SAN is also a teaching hospital, affiliated with the University of Sydney (Sydney Adventist Hospital Clinical School of The University of Sydney (SAHCS)), which is the first private hospital clinical school in NSW, and Avondale College of Higher Education Faculty of Nursing Health, which is one of the oldest continuing nursing schools in Australia. The Sydney Adventist Hospital Clinical Education Centre (CEC), is a purpose built stand-alone clinical education centre, which offers multi-disciplinary training through clinical placements for medical, nursing, physiotherapy, pharmacy, radiography, occupational therapy, orthoptics, midwifery, dietetics and other allied health professional students.

The Clinical Education Centre provides:

- Approximately 40 graduate doctors from the Sydney Adventist Hospital Clinical School of The University of Sydney per year
- Approximately 120 graduate nurses from the Avondale College of Higher Education
- 21,420 medical student training days
- 11,028 nursing student training days
- 2,760 allied health professional training days

The SAN precinct also known as the Wahroonga Estate was identified as a State Significant Site under the former Part 3A of the Environmental Planning and Assessment Act 1979. The site is subject to a concept approval under the former legislation which facilitated the expansion of the hospital as well as a non-government K-12 school, approximately 500 dwellings, further student and nurse accommodation associated with the hospital and additional commercial space. The SAN is identified in Figure 3-10 Local Economy and Employment as a health and education precinct.

The SAN Hospital employed 2,423 staff in 2018, which accounts for about a third of all the health related jobs within Ku-ring-gai. The SAN is possibly the single largest employer within Ku-ring-gai, and as such a significant employer, the SAN plays an important role in catering for any future employment growth within Ku-ring-gai.

### Pymble Business Park

The Pymble Business Park comprises approximately 12.5ha of land west of the intersection of the Pacific Highway and Ryde Road, and land to the east of the Pacific Highway and North Shore rail line. The Business Park accommodates a range of land uses including freight, logistics, office, warehousing and local light industry; and a Bunnings Hardware store has recently been approved. The Pymble Business Park is identified in Figure 3-10 Local Economy and Employment.

Pymble Business Park is Ku-ring-gai's only urban services land, and is identified as 'retain and manage' within the North District Plan. The value of urban services land is not held in how many jobs they directly provide; but in the operational role and function they play.

As of 2006, it was estimated that there was 88,999sqm employment floor space within the Business Park<sup>20</sup>, which accounts for one third of Ku-ring-gai's office and business park floor space. Previous studies such as the Hornsby and Ku-ring-gai Employment Lands Study 2008 have set the strategic direction to discourage retail development within Pymble Business Park.

Pymble Business Park currently experiences high vacancy rates. Transport connectivity is a barrier to optimal utilisation of this area, as well as adjoining biodiversity significant lands and contamination.

<sup>20</sup> SGS Economic and Planning, 2008, Ku-ring-gai and Hornsby Subregional Employment Study – Final Report



## STRATEGIC RESPONSE

As the population grows, it will be important for the local economy and jobs to grow to support the Ku-ring-gai community into the future.

The number of residents leaving Ku-ring-gai everyday for work will continue to place demand on transport infrastructure linking Ku-ring-gai to surrounding strategic centres, such as the Sydney CBD, Willoughby, North Sydney, Macquarie Park and Hornsby. There is a need for more skilled jobs closer to home. Key findings from the community engagement undertaken in 2017 for the review of the Community Strategic Plan – Our Ku-ring-gai 2038 also indicated that there are more opportunities to be provided within Ku-ring-gai for local employment and the Ku-ring-gai local economy should be further developed. Facilitating more local economic and job growth, particularly across existing key industry sectors is important. Council will need to undertake a new Employment Lands Study to provide a more detailed strategic review of employment activities within Ku-ring-gai.

Ku-ring-gai has high levels of home based businesses, and findings from the community engagement undertaken in 2017 for the review of the Community Strategic Plan – Our Ku-ring-gai 2038 showed that there was desire from the community to see co-working hubs for businesses and people who work from home to be provided. The new Employment Lands Study will need to further investigate and assess the needs and opportunities for smart work hubs within Ku-ring-gai, which may make home based work a more viable option for more people. Home based work presents an opportunity for economic growth to build on Ku-ring-gai's assets, but further work needs to be undertaken to understand any potential impacts on local centres.

Pymble Business Park will require a specific investigation into the future strategic role and function of this area, its floor space and land uses. The investigation will quantify the current floor space, jobs and contribution Pymble Business Park as urban services land makes to the local economy. The importance of urban freight and servicing to Pymble Business Park will require further consideration, including movement in and out of the area.

The health and education sectors contribute significantly to employment and the local economy within Ku-ring-gai. However, one of the key challenges is that while these institutions (private schools and private hospitals, such as the SAN) are large employers within Ku-ring-gai, Council will need to manage the impacts of future growth on the surrounding areas and infrastructure. In order to understand and accommodate the future requirements of the SAN precinct, Council will need to continue to liaise with the precinct stakeholders and relevant agencies.

## Principles for local economy and employment

Based on Council's policy and research to date the following principles are identified for future land use planning related to the local economy and employment:

- Protect or expand employment opportunities within Local and Neighbourhood Centres and Pymble Business Park.
- Protect or expand employment opportunities within key industry sectors, including:
  - health care and social assistance;
  - education and training;
  - professional, scientific and technical services;
  - retail trade.
- Provide a balance of 'local service' and 'employment destinations' – the North District Plan provides clear indication that economic growth should be concentrated in centres, however many smaller centres in Ku-ring-gai are fulfilling higher order functions.
- Retain and manage urban services land - Pymble Business Park.
- Discourage retail and residential development in Pymble Business Park.
- Encourage centralised services such as smart work hubs for home based work.
- Protect current employment levels in retailing and hospitality industries and expand opportunities for further employment.
- Provide opportunities for local employment and start-up business for local residents.
- The provision of housing should not compromise a centre's primary role to provide goods and services, and the opportunity for the centre's employment function to grow and change over time.





## Employment - Ku-ring-gai Local Planning Priority and Actions

<p><b>Ku-ring-gai Council</b></p>	<p><b>Ku-ring-gai Local Planning Priority</b></p> <p><b>K26. Fostering a strong local economy that provides future employment opportunities in Ku-ring-gai for both residents and workers within key industries</b></p> <p><b>Actions</b></p> <ul style="list-style-type: none"> <li>• Prepare Employment Lands Study to: <ul style="list-style-type: none"> <li>- undertake a detailed strategic review of employment activities within Ku-ring-gai including current and future floor space requirements, jobs, local businesses and contribution of commercial lands to local economy;</li> <li>- assess impacts of the high cost of small office rentals in strategic centres, and the loss of commercial office space due to residential take up;</li> <li>- investigate employment opportunities arising from new technology and innovation;</li> <li>- investigate home based businesses and demand for supporting infrastructure such as smart work hubs;</li> <li>- investigate the contribution the SAN and the CSIRO make to Ku-ring-gai's local economy, as well as any opportunities for other potential co-located facilities such as accommodation, commercial and mixed use development (short term).</li> </ul> </li> <li>• Liaise with key stakeholders in the SAN health and education precinct and relevant agencies to understand and facilitate the future requirements of the precinct (short term).</li> <li>• Undertake an investigation of Pymble Business Park to consider the current and future strategic role and function, floor space and land uses (short term).</li> </ul>
<p><b>North District Plan</b></p>	<p><b>Planning Priority N9</b></p> <p>Growing and investing in health and education precincts</p> <p><b>Planning Priority N10</b></p> <p>Growing investment, business opportunities and jobs in strategic centres</p> <p><b>Planning Priority N11</b></p> <p>Retaining and managing urban services land</p>
<p><b>Greater Sydney Region Plan</b></p>	<p><b>Objective 21</b></p> <p>Internationally competitive health, education, research and innovation precincts</p> <p><b>Objective 22</b></p> <p>Investment and business activity in centres</p> <p><b>Objective 23</b></p> <p>Industrial and urban services land is planned, retained and managed</p>



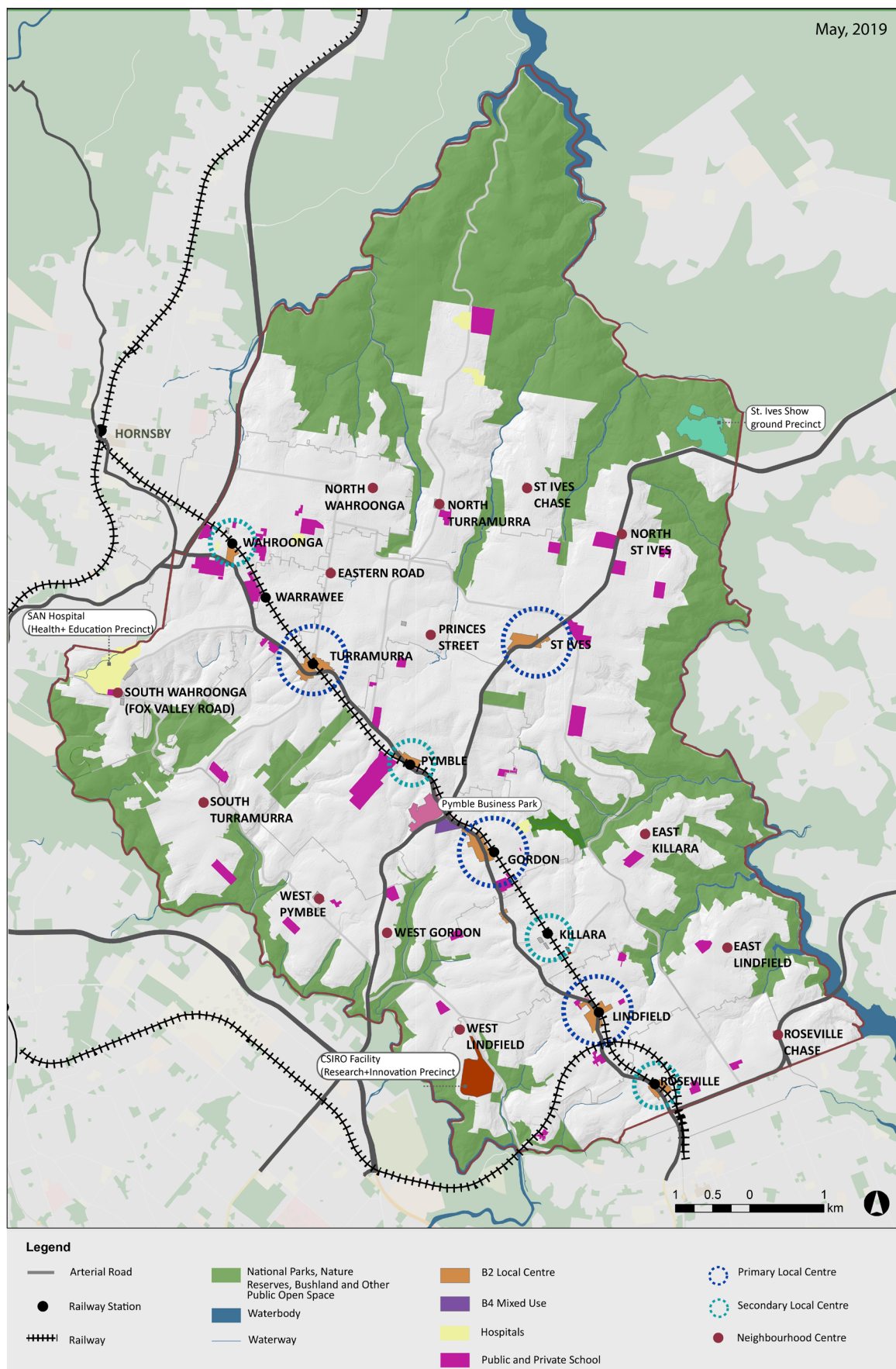


Figure 3-9 Local Economy and Employment