Ku-ring-gai Housing Strategy to 2036

December 2020 (Revised)

Ku-ring-gai Council

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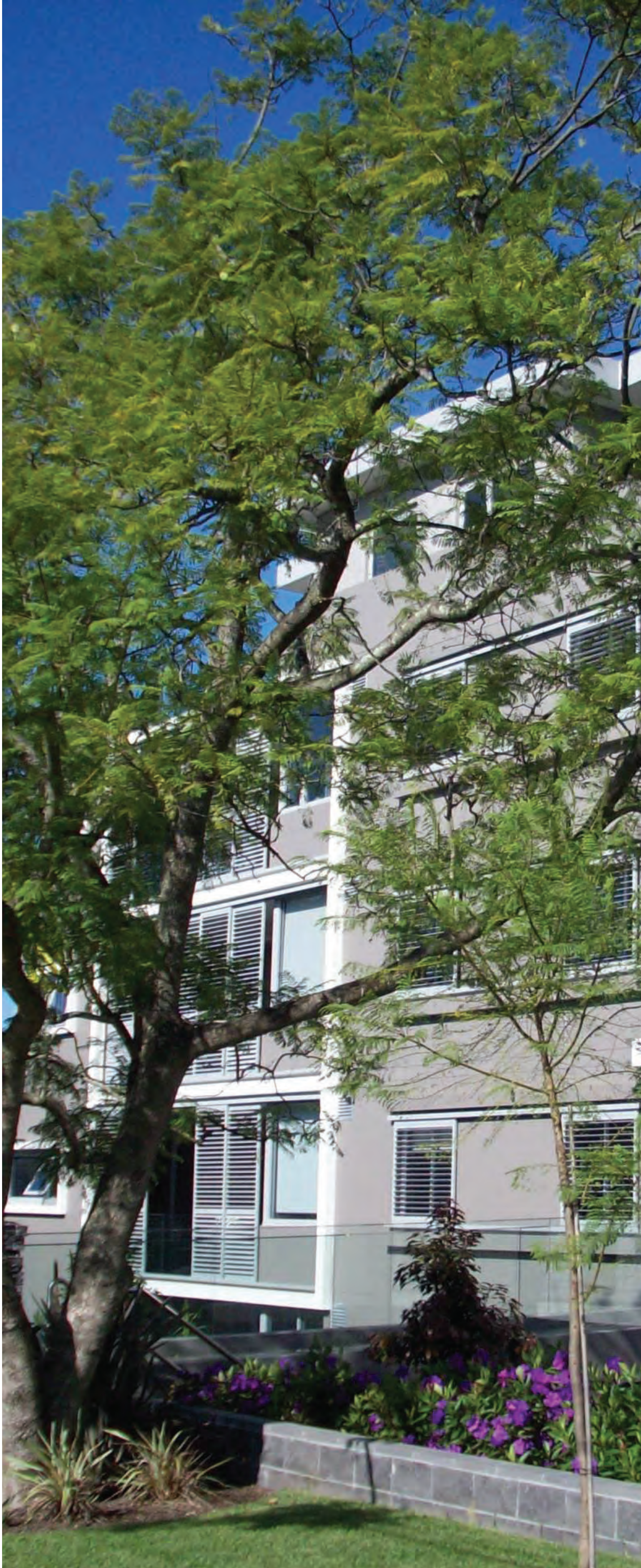
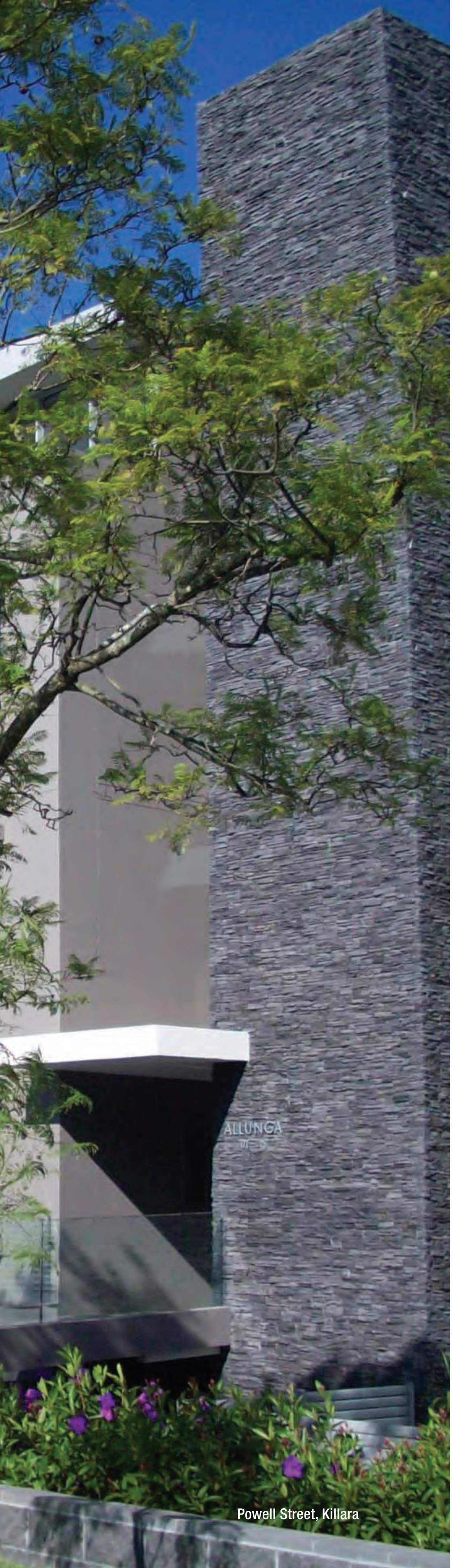




Powell Street, Killara

Contents

Ku-ring-gai's local housing strategy comprises:

Ku-ring-gai Housing Strategy to 2036

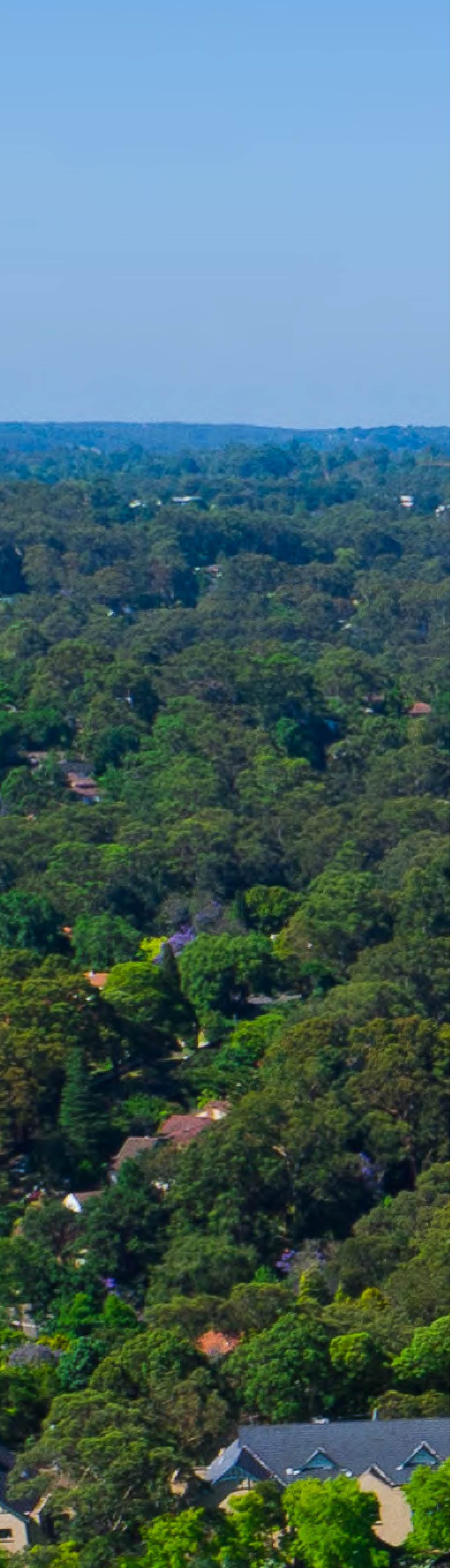
This provides the key information regarding housing provision in the local area to 2036. It gives an overview of investigation outcomes and lists the priorities and actions for future housing delivery in Ku-ring-gai.

Appendix

1. Ku-ring-gai Council Housing Strategy: Communications and Engagement Outcomes Report
2. Ku-ring-gai Housing Needs Study
3. Residual Capacity Maps

Acknowledgment

Ku-ring-gai Council acknowledges the Traditional Owners of this country and pays respect to all Aboriginal people. We acknowledge the Elders in the past and in the present and acknowledge the spirits and ancestors of the Clans that lived in this area.



Figures

01 Introduction

1.1 Planning Policy and Context

WHAT IS THE HOUSING STRATEGY?

The New South Wales (NSW) government requires all councils to prepare a Local Housing Strategy. The Ku-ring-gai Housing Strategy sets out a broad vision and makes recommendations for housing provision in the Ku-ring-gai local government area for the 20 year period from 2016 to 2036. The Housing Strategy will guide housing in Ku-ring-gai through the identification of three *Housing Priorities*, and their associated Objectives and Actions.

The Ku-ring-gai Housing Strategy provides a locally relevant response to the wider strategic plans of the *Greater Sydney Region Plan, A Metropolis of Three Cities and the North District Plan*. At a local level it aligns with Council's Community Strategic Plan, *Our Ku-ring-gai 2038,* and the *Ku-ring-gai Local Strategic Planning Statement*. The Draft Housing Strategy has been prepared in accordance with the Department of Planning, Industry and Environment's Local Housing Strategy Guidelines.

Ku-ring-gai's population is changing. The NSW Department of Planning, Industry and Environment projects that our population will increase by more than 25,000 people over the next 20 years. The profile of our local residents is expected to change with an increasingly ageing population, smaller family groups, proportionally fewer young adults and more single people.

This strategy considers how we will provide housing to cater for the changing needs of our current residents to the year 2036. Our residents know that Ku-ring-gai is a great place to live and many choose to stay here across their life span. We want children growing up in the area to have the choice to stay, and we want people to have housing that meets their needs as they age or as their circumstances change.

To inform Ku-ring-gai's housing future, Council needs to understand the type and amount of housing required to meet the needs of our residents now and over the next 20 years. The Housing Strategy has been prepared from an evidence-based assessment of demographic patterns, housing trends, capacity of existing planning controls contained in the LEPs, and community feedback.

WHY DO WE NEED A HOUSING STRATEGY?

In March 2018, the NSW government introduced amendments to the *NSW Environmental Planning and Assessment Act 1979 (EP&A Act)* including requirements for strategic planning. All local Councils in Sydney are now expected to respond to priorities identified in strategic regional and district plans that have been developed by the Greater Sydney Commission.

Ku-ring-gai Council is located in the North District and is required to respond to the *Greater Sydney Region Plan*, *A Metropolis of Three Cities* and the *North District Plan.* These regional and district plans require Council to prepare a Local Strategic Planning Statement which must be informed by Council's *Community Strategic Plan* and Local Housing Strategy, as per Figure 1-1. They provide directions on how councils will accommodate population increase over the period 2016 to 2036.

Figure 1-1 Strategic Planning Document Context

The *North District Plan* identifies key considerations that Local Housing Strategies should address:

- Delivery of 5 year housing targets for each local government area.
- Delivery of 6-10 year housing supply targets for each local government area.
- Capacity to contribute to the longer term 20 year strategic housing target for the District.

WHAT IS THE NORTH DISTRICT?

The Greater Sydney Commission's ***Greater Sydney Region Plan, A Metropolis of Three Cities*** is built on a vision of three cities – Western Parkland City, Central River City and Eastern Harbour City. Greater Sydney's three cities reach across five districts: Western City District, Central City District, Eastern City District, North District and South District.

The Ku-ring-gai local government area (LGA) is located within the North District, which forms a large part of the Eastern Harbour City. The North District includes eight other local government areas: City of Ryde, Hornsby, Hunters Hill, Lane Cove, Mosman, North Sydney, Northern Beaches and Willoughby. See Figure 1-2.

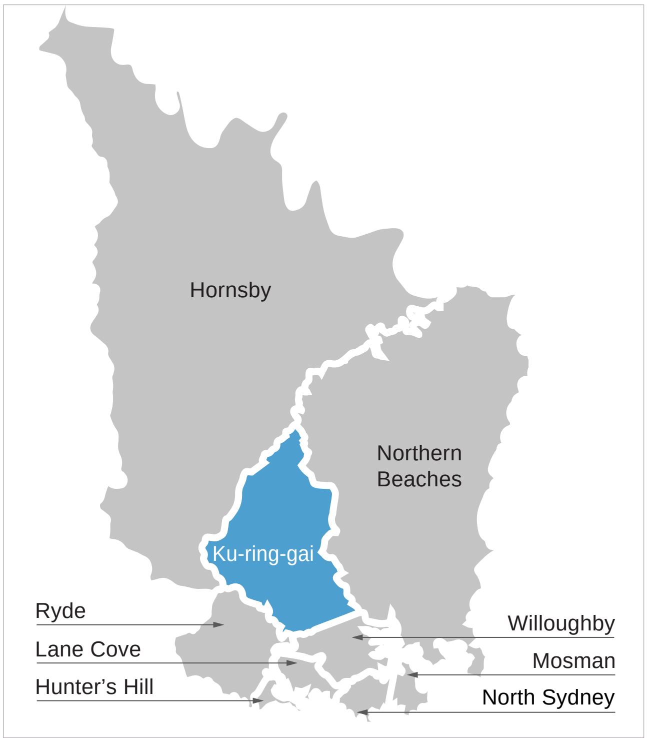


Figure 1-2 North District Local Government Areas

HAS THE NSW GOVERNMENT GIVEN KU-RING-GAI DWELLING TARGETS?

The New South Wales State Department of Planning, Industry and Environment released the 2019 Population Projections on 16th of December 2019. No updated projections taking into consideration the potential impacts of the Covid-19 Pandemic on Sydney's, and Ku-ring-gai's population have been released. Based on the December 2019 projections, the NSW government estimates that by 2036, Ku-ring-gai's resident population will reach 147,809 people – an increase of over 20% or 25,337 new residents from 2016. The ***Greater Sydney Region Plan*** includes dwelling targets for all the Sydney Districts and has the following housing supply targets allocated to nine local government areas in the North District.

Housing Supply Targets for the North District	
0-5 year: 2016-2021	20 year: 2016 to 2036
25,950 dwellings	92,000 dwellings

Figure 1-3 North District Housing Supply Targets Table

The ***Greater Sydney Region Plan*** also identifies a combined 0-5 year housing supply target of 25,950 dwellings across all nine North District councils, as in the table at Figure 1-3.

The ***North District Plan*** breaks down and divides the 25,950 dwelling target for each of the nine North District council areas. It requires delivery of 4,000 new dwellings within Ku-ring-gai during the 5 year period from 2016 to 2021. Since 2016, more than half of the required housing supply quota has been met, with the remaining amount fully deliverable through current development approvals and existing capacity within the Ku-ring-gai Local Environmental Plans. This means that the 0-5 year housing supply target of 4,000 dwellings is achievable under Council's existing planning policies and no amendment to the ***Ku-ring-gai Local Environmental Plan*** is necessary.

The Greater Sydney Commission 'Letter of Support' issued March 2020 for the Ku-ring-gai LSPS outlines that the Housing Strategy is to show how Ku-ring-gai can meet an indicative draft range of 3,000 - 3,600 dwellings for the 6-10 year housing target. Correspondence from the Minister of Planning dated 8 September 2020 states *'Ultimately, Council is responsible for deciding the number of dwellings in its local housing supply target'* and *'the target discussed with the Greater Sydney Commission is not a legal requirement upon Council by the Government'*.

WHY IS THE HOUSING STRATEGY IMPORTANT?

Over the next 20 years, Ku-ring-gai will grow and change. The Housing Strategy will help us manage and monitor that change.

The Housing Strategy will:

- Enable Council to proactively manage the projected increase in local population and monitor the provision of suitable housing numbers and types at appropriate locations.
- Set out a framework to provide for housing in accordance with community feedback, to ensure the protection of the valued local character and amenity of the area.
- Provide clarity on how Ku-ring-gai will grow over the next 20 years.

We are getting older

By 2036, those aged 65 years and over in Ku-ring-gai will increase by almost 40% compared to 2016. Through previous community consultation, we know that when it comes to the needs of our older residents, maintaining wellbeing, social connections and independence are key considerations so that people can stay healthy for longer and support themselves in their own home.

We are losing our younger people

Based on current projections, the proportion of the population in the 25 – 39 age group will continue to decline to 2036. Keeping those of working and family age in Ku-ring-gai will ensure we retain a diversity of age groups in the area. This is key to contributing to our area's vibrancy and stability.

Our household structures are changing

Projections from the NSW Department of Planning, Infrastructure and Environment indicate that the number of people living alone in Ku-ring-gai will increase over the next 20 years, and that the average household size will become smaller as family structures change. We need to address the housing needs of smaller and lone person households.

HOW HAS THE HOUSING STRATEGY BEEN PREPARED?

The Housing Strategy has been informed by an evidence base for future housing provision in the Ku-ring-gai local government area over the next 20 years to 2036. The evidence base includes:

- Qualitative Investigation – what the community and stakeholders have voiced about future housing provision.
- Quantitative Investigation – what the data indicates about existing demographic trends and future population projections.
- Capacity Investigation – what is the capacity to deliver housing across the LGA under the existing zoning and planning controls contained within the Ku-ring-gai Local Environmental Plans.

This evidence base analyses the existing and future population, and determines the type and amount of housing required by our residents to 2036. It investigates the capacity to deliver housing across the LGA from within existing planning controls.

Lorne Avenue, Killara

1.2 LGA Housing Snapshot

Ku-ring-gai 2016

Population

An estimated resident population of **126,046** (2018, ABS ERP)

19,350 residents aged 10-19

21,700 residents aged 65+

30,223 people work in Ku-ring-gai

56% live outside Ku-ring-gai

44% live in Ku-ring-gai

Main local industries include *Health Care and Social Assistance* and *Education and Training*

Land

3rd largest LGA in the North District

8 train stations

4,596 ha of residential land

627 ha of Heritage Conservation Areas

3,356ha of open space

Housing

Separate dwellings is the dominant housing type.

42,511 dwellings

41,200 households

23% flats / apartments

4% townhouse / terrace

73% separate houses

78% home ownership

17% homes rented

22,700 households with children

Growth 2006-2016

+18,022 population increase

1.6% average annual growth

73% increase in housing stress

96% increase in median sale price

36% increase in median rental price

+9,000 international migration (2011-2016)

+38,000 national migration (2011-2016)

Ku-ring-gai 2036

Population

A projected resident population of

147,809

(2036, DPIE Projections)

22,517

residents aged 10-19

30,245

residents aged 65+

Housing

Improved housing choice; more medium and high density dwellings

54,095

implied dwellings

51,004

projected households

8,806

projected lone person households

12,639

projected couple only households

26,880

projected households with children

Growth 2016-2036

+25,337

more people by 2036

0.94%

average annual growth

52% female

48% male

21%

population increase

+1,267

more people each year

A growing proportion of older people.

Number of people aged 65+ projected to increase by

39%

by 2036

+10,660

more implied dwellings

+10,427

more projected households

Household Type	Ku-ring-gai 2016	% increase to 2036
Families with children	21,776 or 55%	23% increase
Couples only	9,589 or 24%	32% increase
Lone person	6,157 or 15%	43% increase

1.3 Vision

Ku-ring-gai's Housing Future: liveable for life

Housing in Ku-ring-gai will support connected communities by providing sustainable, diverse, and well-designed homes to accommodate a changing community, close to key infrastructure and aligned with the local character.

Diversity

Diversity
Provide a variety of housing types and sizes to suit the changing needs of the community.

Affordability
Enable people to live in the area through changing life stages and circumstances.

Accessibility
Enable people of all ages and abilities to continue to live independently, close to networks and age in place.

Liveability

Liveability
Locate housing to create connected communities living in healthy neighbourhoods with amenity, safety and open space.

Mobility
Provide new housing within a 10 minute walk to frequent train and bus services, close to cycle routes, and having regard to traffic flow and parking.

Social and Cultural Infrastructure
Provide key services and facilities to support and engage our community.

Quality

Design
Provide high quality, well designed homes that consider streetscape, context and building scale.

Character
Ensure housing respects local character, and is compatible with heritage and biodiversity values.

Sustainability
Deliver environmentally sustainable homes that are resilient to a changing climate.

02 Evidence

2.1 Overview

Ku-ring-gai is a much sought after area attracting residents seeking high amenity living with good proximity to educational and other facilities, and access to reliable, high frequency public transport linking to the Sydney CBD.

NORTH DISTRICT PLAN REQUIREMENTS

The District Plan assigns a 20 year (2016-2036) strategic combined housing target of 92,000 dwellings across the North District's nine council areas.

The 20 year period from 2016-2036 is divided into 5-yearly segments (by financial year) for housing delivery, and the North District Plan requires the following:

- **0-5 year period (2016-2021)**

  The *North District Plan* allocates a combined housing target of 25,950 dwellings for the Northern District for the 0-5 year (2016-2021) period. It also stipulates the 0-5 year housing target for each council area with Ku-ring-gai required to deliver 4,000 dwellings by 2021.

- **6-10 year period (2021-2026)**

  The *North District Plan* requires each Council to develop 6-10 year (2021-2026) housing targets specific to the local area through a local housing strategy. The strategy is to demonstrate evidence-based capacity for steady housing supply into the medium term and contribution to the district housing target. The Greater Sydney Commission 'Letter of Support' issued March 2020 for the Ku-ring-gai LSPS requires the Ku-ring-gai Housing Strategy to demonstrate an indicative draft range of 3,000 - 3,600 dwellings for the 6-10 year period.

- **11-15 (2026-2031) and 15-20 year targets (2031-2036)**

  The *North District Plan* expects each council to adopt a long term outlook and stipulate the capacity to contribute to the longer term 20-year strategic housing target for the District to 2036.

The Ku-ring-gai Housing Strategy is the result of extensive research and community consultation. It balances the need for more homes with the need to consider infrastructure, sustainable growth and the creation of great places whilst protecting key existing heritage, biodiversity and tree canopy assets.

The evidence that has informed the Housing Strategy consists of three key components underpinned by detailed studies. The three investigation components are:

- **Qualitative investigation – what the community and stakeholders have voiced about future housing provision.**

  » The *Ku-ring-gai Housing Strategy: Communications and Engagement Outcomes Report* (Appendix 1) presents the findings from engagement activities with the community, including input from state agencies and other housing related organisations, on housing aspirations for the local area.

  » Community feedback from the public exhibition of the draft Ku-ring-gai Housing Strategy from 26 March to 8 May 2020.

- **Quantitative investigation - what the data indicates about existing and projections of local demographics and housing data.**

  » The *Ku-ring-gai Council Housing Needs Study* (Appendix 2) has been prepared utilising established data sources, including census and state government forecast data, to identify local population patterns, trends, demographic projections, housing stock and likely future housing demand.

- **Capacity investigation – what is the capacity to deliver housing across the LGA under the existing zoning and planning controls contained within the Ku-ring-gai Local Environmental Plans.**

  » *Residual Capacity Maps* (Appendix 3) identifies where within Ku-ring-gai there is residual capacity for housing delivery under the existing zonings and planning controls contained within the Ku-ring-gai Local Environmental Plans.

2.2 Qualitative Investigation Stakeholder Views and Priorities

This section is informed by the *Ku-ring-gai Council Housing Strategy: Communications and Engagement Outcomes Report* (Appendix 1), as well as the community feedback received in response to the public exhibition of the draft Ku-ring-gai Housing Strategy for 6 weeks from 26 March to 8 May 2020.

PHASE 1 COMMUNITY AND STAKEHOLDER ENGAGEMENT – OCTOBER 2019-FEBRUARY 2020

Community and stakeholder engagement (Figure 1-4) undertaken by Elton Consulting as part of the preparation of the Housing Strategy involved a survey, community sounding board group of 15 community members, 3 x focus groups, 10 x stakeholder interviews with aged care, property development, architecture, real estate and transport sectors, 6 x community workshops based on specific centres, resident action groups and youth group. The Communications and Engagement Outcomes Report contains the detailed information on the engagement undertaken and responses received. A summary of the following key points includes:

- A strong desire for townhouse/villa/terrace style housing and a recognition of the existing lack of supply.
- Opportunities to make better use of existing housing stock through subdividing larger lots and/or houses.
- Provision of a diverse range of housing options, particularly for young families and the ageing population.
- Protection of the tree canopy, biodiversity and heritage character.
- Importance of locating density in appropriate locations, with some opposition to high density.
- Provision of interconnecting transport, active transport networks and social infrastructure.
- Delivery of open space should be a key goal for any redevelopment.
- Preference for additional housing in locations with access to public transport, shops, facilities and open space.
- Opportunities to investigate appropriate density in suitable locations outside the Local Centres, utilising a staging approach.
- Recognition that the Local Centres are in need of revitalisation to improve functionality, but concerns about too much height.
- Necessity for additional housing to be of high quality design that considers interface and integration with the surrounding environment.
- Mixed views surrounding the provision of housing to support younger people in suitable housing typologies.
- Consideration of affordability at different life stages.
- Investigation of opportunities for key worker housing.
- Recommendation that the Housing Strategy is explicit about transport improvement dependencies to trigger and enable residential development.
- Concerns surrounding the feasibility of Centre revitalisation under existing planning controls.
- Concerns surrounding the availability of sites large enough to develop the preferred co-located aged care and retirement living model.
- Concerns regarding existing pressure on infrastructure, such as traffic congestion, school capacity and open space provision.
- Opposition to high density development and units, and Ku-ring-gai had delivered sufficient housing over the last 10 years.
- ‘No housing, no more people’ perspective.
- Resistance towards additional dwellings being provided,

Figure 1-4 - Engagement Tools and Techniques

PHASE 2 – PUBLIC EXHIBITION – MARCH – MAY 2020

The draft Ku-ring-gai Housing Strategy was placed on public exhibition for a period of 6 weeks, from 26 March to 8 May 2020 to get community feedback on the strategy, including the vision, housing priorities and actions. 255 submissions and 9 late submissions were received. From these submissions:

- 41 were in support of the draft Housing Strategy.
- 157 were not in support of the draft Housing Strategy.
- The remaining submissions did not note a clear position.

Key issues raised in the submissions received in response to the public exhibition included the following:

- Concerns regarding projected population and dwelling increase.
- Requests for Council to review projected population and proposed dwelling increase in light of potential impacts from COVID-19
- Support for housing diversity, mix and choice.
- Support for medium density typologies and subdivision options.
- Concerns regarding the Low Rise Medium Density Housing Code and support for a Ku-ring-gai complying development model.
- Support for high density housing in well connected locations with access to transport, services and community facilities.
- Concerns regarding the height, scale and design of high density housing.
- Concerns regarding environmental, social and economic impacts of high density housing.
- Support and objection to the Local Centre Approach, with suggestions for additional areas that could be suitable for increased density, such as East and West Lindfield, Killara, North St Ives, Pymble shops, Roseville, Wahroonga and Warrawee.
- Concerns regarding increased density in St Ives without adequate transport infrastructure provision.
- Support for Local Centre revitalisation.
- Support for affordable housing for key workers including nurses, police and teachers.
- Desire for high design quality and sustainability requirements for future housing.
- Concern for heritage protection and conservation.
- Concern for environmental protection and biodiversity conservation.
- Desire to preserve unique visual, landscape and local character.
- Concerns regarding inadequate infrastructure provision.
- Desire for transport infrastructure, open green and recreational spaces and community facilities to be delivered to support increased population.
- Concern with proposed dwelling increase of 10,660 – unsustainable and undesirable.
- Department and GSC need to recognise the past delivery of dwellings within Ku-ring-gai.
- Need for reduction in future dwelling targets in Ku-ring-gai.
- There is no need to change current zoning and planning controls as the new dwellings can be met under existing planning controls.
- Existing capacity needs to be utilised before rezoning for more.
- Opposition to increased heights and densities.

In considering the draft Housing Strategy at the OMC 22 September 2020 the Mayoral Minute raised community feedback and correspondence which had been received outlining that the community does not want further development beyond what is currently permitted by the existing planning controls, *'It is clear from the correspondence that I and my Councillor colleagues have been receiving in recent weeks, that the overwhelming majority of our community does not want more development beyond that already existing in current zonings.'*

2.3 Quantitative Investigation Demographic and Housing Data

This section provides an overview of the key findings from the Ku-ring-gai Council Housing Needs Study (Appendix 2). The Housing Needs Study evaluates past trends and the components of expected population change to inform future housing needs in Ku-ring-gai LGA. The Ku-ring-gai Council Housing Needs Study tests and confirms the Department of Planning, Industry and Environment's implied dwelling demand and indicates a future housing need of 10,704 dwellings to meet local needs to 2036.

Key findings from the demographic and housing analysis include:

Population Change

- By 2036, Ku-ring-gai is forecasted to have 25,337 additional residents making up 10,427 additional households. The local population profile is forecasted to continue to see a dominance of *couples with children* (45%) followed by *lone person* and *couple only* households (42%).

Structural Age Change

- Over 14,400 additional people over 50 years in age are forecast to live in Ku-ring-gai by 2036. Approximately 4,000 of these additional people will be over 80 years in age and are more likely to be in the frail category.

Household Composition

- Smaller households including *lone person* and *couple only* households are forecast to have the greatest growth and are expected to make up 42% of households in the LGA by 2036. The majority of these households are expected to be in the older age cohorts. This may result in a larger proportion of households looking to downsize to apartments or townhouses, or age in place in existing detached dwellings.
- *Couples with children* households will remain the dominant single household type in Ku-ring-gai at 45%. There has been very limited growth of the household type *living in detached dwellings* between 2006 – 2016, with the greatest growth being in the household type *living in apartment* typologies. This household type may require access to a more diverse range of housing typologies including townhouses, attached or other typologies, in addition to apartments and detached dwellings.

Housing Affordability

- To address affordability issues faced by resident's changing situations over the 20 year period to 2036, and the barriers to key workers that travel from outside the North District to work in Ku-ring-gai, it is estimated at least 4,000 Affordable Housing dwellings could be utilised in the LGA based on eligibility under the *NSW Affordable Housing Ministerial Guidelines*.

Housing Needs for an Ageing Population

- The forecast growth in over 65s to 2036, results in approximately 387 additional aged care places likely to be required in order to provide the same ratio of places for frail aged population (as at 2016). While health and life expectancy is improving in older cohorts, this is likely offset by the significant increase in the over 85 population forecast in the frail category where there is a greater likelihood of requiring care in the Ku-ring-gai LGA.
- The general downsizing rate in older Australians is around 35%, and the Housing Needs Study investigates Ku-ring-gai's ageing population and current trends, and confirms an assumption of 35% downsizing as a reasonable guide for the ageing population, should desired stock be available in the right location.
- Many of Ku-ring-gai's older cohort chose to remain in their detached dwelling homes, suggesting the need to address housing options that enable this choice.
- A detailed analysis and methodology used to assess the likely demand for future housing to 2036 in the LGA is provided in the *Ku-ring-gai Council Housing Needs Study*. Given that Ku-ring-gai has no surplus land for sub-division into large lots for new detached houses, the assessment considers the quantum provision of apartment and townhouse dwelling types to meet future housing demand as per Figure 1-5.

Ku-ring-gai LGA Housing Demand 2016-2036				
Housing Typology	Household Type	Number of Dwellings	Total	
			Number	%
Apartments	*Lone person* and *couple only* and *couple with children* (young adult/beginning families)	909	5,733	54%
	Lone person and *couple only* (downsizing ageing population)	3,820		
	Single parent	1,004		
Townhouse/manor house/ attached dual occupancy	*Lone person* and *couple only* (downsizing ageing population)	3,609	4,971	46%
	Couple with children	1,362		
Separate detached house with garden	*Couple with children*	Existing housing stock		
	Lone person and *couple only* (ageing in place)			
Housing need total (2016–2036) (Note-the breakdown of housing typologies in the *Ku-ring-gai Council Housing Needs Study* does not account for feasibility of particular dwelling typologies at particular locations)				**10,704**
Housing needs total aligns with the Department of Planning, Industry & Environment Implied Dwelling Projections (2016–2036)				**10,660**

Source: Appendix 2 - Ku-ring-gai Council Housing Needs Study March 2020 - Elton Consulting

Figure 1-5- Ku-ring-gai LGA Housing Demand 2016 - 2036

2.4 Capacity Investigation Housing Provision

DEFINITIONS

Dwelling completion - A dwelling is considered completed once a new water connection has been installed or an occupancy certificate has been obtained.

Residual capacity - Refers to all existing undeveloped R3, R4, B2 and B4 zoned sites with no development applications or with approved development applications that do not yet have construction certificates i.e. where construction has not commenced. These sites have the capacity to deliver future dwellings.

Pipeline development - Refers to sites with approved development applications that are under construction or have obtained construction certificates, that are not yet counted as part of dwelling completions.

Alternative dwellings - Refers to dwellings that are not captured in the DPIE Metropolitan Housing Monitor, such as group homes, boarding houses, secondary dwellings, aged care and nursing home facilities. Council records are used to monitor alternative dwellings.

0-5 YEAR TARGET – 4,000 DWELLINGS

As of June 2020, 2,950 multi-unit dwellings, 115 net detached houses and 114 alternative dwellings have been completed since July 2016. This is a total of 3,179 dwellings. By the end of June 2021, 821 additional dwellings are required to fulfill the GSC's 0-5 year dwelling target of 4,000 dwellings.

0-5 year target of 4,000 dwellings	
Multi-unit dwellings	2,950
Net detached houses	115
Alternative dwellings	114
Total completions July 2016 – June 2020	**3,179**

Note: Multi-unit dwellings and net detached house completions are collated from the Department of Planning, Industry and Environment's Housing Monitor. Net detached house completions do not include knock-down rebuilds. Alternative dwelling completions are collated from Council Records. This data is monitored on a quarterly basis.

Figure 1-6- Ku-ring-gai Total Completions 2016 - 2020

6-10 YEAR TARGET – 3,000 – 3,600 DWELLINGS

In March 2020, Council received the Greater Sydney Commission's written Letter of Support for the Local Strategic Planning Statement which provided an indicative range of 3,000 – 3,600 dwellings for Ku-ring-gai's 6-10 year housing target.

PIPELINE DEVELOPMENT (UNDER CONSTRUCTION OR WITH A CONSTRUCTION CERTIFICATE)

There are approximately 220 multi-unit dwellings on R3, R4, B2 and B4 zoned sites currently in the pipeline, as well as 70 seniors housing dwellings. There are also two aged care facilities in the pipeline that will result in approximately 200 beds.

RESIDUAL CAPACITY

An assessment was undertaken to determine Ku-ring-gai's residual capacity under existing planning controls. Average annual take up rates of existing mixed use, medium and high density zoned sites were determined and applied to undeveloped residential sites zoned R3 or R4 and some B2 and B4 sites across the LGA to determine the likely numbers of dwellings that could be delivered in the future under the existing planning controls. Refer to Appendix 3 Residual Capacity Maps for the mapping analysis and detailed methodology.

The assessment indicated the following:

- Within existing planning controls, there is a residual capacity of approximately 2,700 dwellings on sites currently zoned R3, R4, B2 and B4. This dwelling yield will contribute to the 0-5 year dwelling target of 4,000 dwellings. Any dwellings delivered from the remaining capacity will contribute to the 6-10 year dwelling target.
- Residual capacity within current planning controls will be supplemented by the delivery of seniors housing developments and alternative dwellings such as secondary dwellings, group homes and boarding houses where permissible.

HOUSING NEEDS TO 2036

- The Housing Needs Study prepared by Elton Consulting (Appendix 2) tests and confirms the DPIE's projected dwelling numbers and indicates a future housing need of 10,704 dwellings to meet local needs to 2036, with a strong focus on the downsizing needs of an ageing population. This analysis has been considered alongside community feedback, which found that the overwhelming majority of the community does not want more development beyond what is prescribed in the existing planning controls.

Housing for an ageing population

- The delivery of seniors housing developments and alternative dwellings will be continually monitored and will contribute to the dwelling targets set by the Greater Sydney Commission.
- Over the last 5 years there has been an average of 9 approved seniors housing applications per year resulting in an average of 76 approved dwellings per year. Ku-ring-gai has seen a steady rate of seniors housing applications since the inception of the SEPP and this rate does not appear to be impeded by the recent exclusion of heritage conservation areas from the SEPP.
- Over the last 4 years there has been an average of 36 approved secondary dwelling applications per year resulting in an average of 27 completed dwellings per year.
- Over the last 4 years there has been an average of 2 approved seniors housing applications for aged care or nursing home facilities per year, resulting in an average of 138 approved beds per year.
- Based on this, approximately 27 secondary dwellings, 103 seniors housing dwellings and over 100 beds within aged care or nursing home facilities can be anticipated annually, in addition to remaining residual capacity, with a large portion of these providing suitable accommodation for the ageing population.
- By utilizing residual capacity under existing planning controls supplemented by the delivery of seniors housing developments and alternative dwellings, the housing needs of Ku-ring-gai's community will be balanced with the protection of local character, heritage and biodiversity assets in line with community feedback.

Seniors Housing Forecast		
Year	**Number of approved applications**	**Number of dwellings**
2015	7	68
2016	6	39
2017	6	43
2018	13	136
2019	11	96
5 year average	**8.6**	**76.4**

Figure 1-7- Ku-ring-gai Seniors Housing 5 Year Average Forecast

Secondary Dwellings Forecast		
Year	**Number of approved applications**	**Number of completed dwellings**
2016	17	16
2017	40	34
2018	40	31
2019	45	27
4 year average	**35.5**	**27**

Figure 1-8- Ku-ring-gai Secondary Dwellings 4 Year Average Forecast

HOUSING DELIVERY TO 2036

The analysis of the evidence, investigations and community feedback support the following staged housing provision in Ku-ring-gai over the 20 year period 2016-2036.

Stage 1 - 2016 - 2021

- Delivery of housing will continue under Council's existing planning controls.
- It is likely that Ku-ring-gai will meet the 4,000 dwelling target set in the North District Plan for the 2016-2021 period under the existing planning controls with 3,179 dwellings already delivered since July 2016.

Stage 2 - 2021 - 2026

- Delivery of housing will continue under Council's existing planning controls, comprising of the remaining capacity not taken up within Stage 1.
- This will be supplemented by the delivery of seniors housing developments and alternative dwellings where permissible.

Stage 3 - 2026 - 2031

- Monitor the take up of any remaining residual capacity within existing planning controls.
- Monitor the delivery of seniors housing developments and alternative dwellings.

Stage 4 - 2031 - 2036

- Monitor the take up of any remaining residual capacity within existing planning controls.
- Monitor the delivery of seniors housing developments and alternative dwellings.

Delivery period	STAGE 1 2016 to 2021 0-5 year target	STAGE 2 2021 to 2026 6-10 year target	STAGE 3 2026 to 2031	STAGE 4 2031 to 2036
Greater Sydney Commission Requirement	4,000	3,000 to 3,600	Capacity to contribute to the North District 20-year target	Capacity to contribute to the North District 20-year target
Delivery mechanism	Existing planning controls	Remaining residual capacity supplemented by seniors housing and alternative dwellings	Remaining residual capacity supplemented by seniors housing and alternative dwellings	Remaining residual capacity supplemented by seniors housing and alternative dwellings

Figure 1-9 - Ku-ring-gai Housing Provision 2016 - 2036

03 Priorities and Actions

3.1 Priorities, Objectives and Actions

The Housing Strategy Priorities are Council's long term goals for housing in the LGA.

The Housing Priorities and Objectives are consistent with and deliver on the associated principles in the *Greater Sydney Region Plan, A Metropolis of Three Cities,* the *North District Plan*. and *Ku-ring-gai's Local Strategic Planning Statement*.

The development of the Priorities and their Objectives has been informed by:

- The context and framework of state and local strategic planning directions.
- The analysis of the local demographic, housing and capacity evidence-base.
- The views of the local community and stakeholders.

The Priorities and Objectives require an implementation and delivery plan to identify the mechanisms and timing for housing delivery over the life of the Housing Strategy. This is done through setting Actions and corresponding Indicators that operationalise the Priorities and Objectives.

Marian Street, Killara

Housing Priority H1

Manage and monitor the supply of housing in the right locations

Housing Objectives
» To monitor the delivery of housing within areas close to services, cultural and community facilities, and within a 10 minute walking distance to key public transport nodes.
» To provide homes in areas that can support the creation and growth of vibrant Local Centres and a thriving local economy.
» To ensure the delivery of housing is in coordination with provision of local and state infrastructure and services.

This Housing Priority H1 and its objectives are in alignment with, and deliver on, the following principles in the *Greater Sydney Region Plan, North District Plan* and *Ku-ring-gai's Local Strategic Planning Statement (LSPS)*.

Ku-ring-gai's Local Strategic Planning Statement
K3. Providing housing close to transport, services and facilities to meet the existing and future requirements of a growing and changing community.
K6. Revitalising and growing a network of centres that offer unique character and lifestyle for local residents.
K21. Prioritising new development and housing in locations that enable 30 minute access to key strategic centres.

North District Plan
N4. Fostering healthy, creative, culturally rich and socially connected communities.
N5. Providing housing supply, choice and affordability with access to jobs, services and public transport.
N6. Creating and renewing great places and Local Centres, and respecting the District's heritage.

Greater Sydney Region Plan
Objective 12. Great places that bring people together.

Actions	Timeframe			
	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036
Continue to facilitate housing development utilising capacity available under existing planning controls. **Indicator** - Delivery of new dwellings within Ku-ring-gai.	●	●	●	●
Monitor the ongoing supply and take up of capacity against the 0-5 year (2016-2021) and 6-10 year (2021-2026) housing targets. **Indicator** - Net dwelling approvals and completions are monitored on an ongoing basis.	●	●		
Develop a system and processes to accurately monitor the take up and delivery of housing under existing planning controls. **Indicator** - A monitoring system is developed in collaboration with Development and Regulation and Land Information Systems to accurately capture dwelling approvals and completions.	●	●		
Work with NSW government agencies to align their infrastructure delivery plans with future housing delivery. **Indicator** - Ongoing engagement takes place with state agencies and utility providers including the Greater Sydney Commission, Department of Planning, Industry and Environment, Department of Education, Department of Health, Transport for New South Wales, Rural Fire Services, Sydney Water Corporation and Ausgrid.	●	●	●	●
Review and assess planning proposals based on the Local Planning Priorities K3, K4 and K5 of the Ku-ring-gai Local Strategic Planning Statement, as well as consistency against *'Principles for the location of additional housing' and 'Ku-ring-gai Centres – Potential Suitability for additional housing'.* **Indicator** - Planning Proposals are reviewed and assessed against LSPS Local Planning Priorities.	●	●	●	●

Housing Priority H2

Encourage diversity and choice of housing

Housing Objectives
» To encourage a mix of dwelling types and sizes.
» To investigate housing affordability.
» To ensure new homes are accessible and meet mobility needs.

This Housing Priority H2 and its objectives are in alignment with, and deliver on, the following principles in the *Greater Sydney Region Plan, North District Plan* and *Ku-ring-gai's Local Strategic Planning Statement (LSPS)*.

Ku-ring-gai's Local Strategic Planning Statement
K3. Providing housing close to transport, services and facilities to meet the existing and future requirements of a growing and changing community.
K4. Providing a range of diverse housing to accommodate the changing structure of families and households and enable ageing in place.
K5. Providing affordable housing that retains and strengthens the local residential and business community.

North District Plan
N3. Providing services and social infrastructure to meet people's changing needs.
N5. Providing housing supply, choice and affordability with access to jobs, services and public transport.
N6. Creating and renewing great places and Local Centres, and respecting the District's heritage.

Greater Sydney Region Plan
Objective 12. Great places that bring people together.

Actions	Timeframe			
	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036
Monitor delivery of seniors housing and secondary dwellings as alternative dwellings which provide for and accommodate the changing structure of families and the ageing population. **Indicator** - Approvals and completions of seniors housing and secondary dwellings are monitored on an ongoing basis	●	●	●	●
Investigate the potential for a locally specific medium density complying development model as an alternative to the *Low Rise Medium Density Housing Code* included in the *State Environmental Planning Policy (Exempt and Complying Development Codes) 2008*. **Indicator** - Evidence is presented to the Department of Planning, Industry and Environment seeking amendment to the *Low Rise Medium Density Housing Code*.	●			
Prepare a Housing Affordability Study to determine the needs of residents and essential workers and mechanism to determine appropriate locations for viable provision. **Indicator** - A Housing Affordability Study has been prepared to inform preparation of a *State Environmental Planning Policy No. 70 – Affordable Housing (Revised Scheme) Contributions Scheme.*		●		
Investigate and prepare an evidence base to determine the future requirements for accessible housing. **Indicator** - Amendments are made to the accessibility controls in the *Ku-ring-gai Development Control Plan* to address future requirements.		●		

Housing Priority H3

Increasing liveability, sustainability and area character through high-quality design

Housing Objectives
» To encourage housing that contributes to healthy and active neighbourhoods.
» To facilitate high quality housing that is responsive to Ku-ring-gai's local character.
» To promote housing that meets high sustainability performance targets.

This Housing Priority H3 and its objectives are in alignment with, and deliver on, the following principles in the *Greater Sydney Region Plan, North District Plan* and *Ku-ring-gai's Local Strategic Planning Statement (LSPS)*.

Ku-ring-gai's Local Strategic Planning Statement
K3. Providing housing close to transport, services and facilities to meet the existing and future requirements of a growing and changing community.
K7. Facilitating mixed-use developments within the centres that achieve urban design excellence.
K12. Managing change and growth in a way that conserves and enhances Ku-ring-gai's unique visual and landscape character.
K39. Reducing the vulnerability, and increasing resilience, to the impacts of climate change on Council, the community and the natural and built environment.

North District Plan
N6. Creating and renewing great places and Local Centres, and respecting the District's heritage.
N22. Adapting to the impacts of urban and natural hazards and climate change.

Greater Sydney Region Plan
Objective 12. Great places that bring people together.

Actions	Timeframe			
	2016 - 2021	2021 - 2026	2026 - 2031	2031 - 2036
Undertake a Local Character Study in accordance with the Department of Planning, Industry and Environment's Local Character and Place Guidelines to inform the preparation of local character mapping and local character statements. **Indicator** - Council adopts broad character areas and existing character statements.	●			
Collaboration with other agencies to build and strengthen partnerships and advocate for BASIX to be updated and strengthened to deliver sustainable housing that supports Council's net zero emissions target. **Indicator** - Ongoing Council collaboration and advocacy for improvements to BASIX.	●	●	●	●
Promote Council's design quality and building sustainability standards to industry and community stakeholders. **Indicator** - Ongoing promotion to industry and community stakeholders.	●	●	●	●
Review the effectiveness of existing strategies and plans in place to protect and enhance Ku-ring-gai's unique visual and landscape character, and effectively manage the impacts of new developments. **Indicator** - Council's existing strategies and plans are continually reviewed for effectiveness to ensure the unique visual and landscape character is protected, and new developments are managed.	●	●	●	●

3.2 Implementation

Ku-ring-gai's Housing Priorities and Objectives will be implemented through a series of actions involving the following key approaches.

Policy Development

Council will address housing issues by developing policies, strategies and action plans that draw on evidence-based research and analysis, best practice and innovative approaches.

Community Engagement

Council will provide information, customer service, community consultation and stakeholder engagement to raise awareness and encourage community involvement in the provisions of local housing.

Leadership

Council will lead by example by supporting innovative and collaborative approaches to the delivery of diverse, accessible and sustainable housing for its community.

Collaboration

Council will work with state agencies, neighbouring councils, business and community organisations through formal and informal avenues to deliver initiatives to accommodate the changing community.

3.3 Monitoring

Ku-ring-gai Council will monitor the progress of the priorities, objectives and actions of the Housing Strategy on an ongoing basis. This is essential to track the progress of the Strategy, ensuring accountability and transparency. It will also enable early identification of issues and ongoing adjustment of the Strategy. The monitoring of this Strategy will involve:

- Annual reviews of housing delivery through the state government's housing monitor and Council's development approvals monitoring system will monitor the delivery of housing under existing planning controls. Annual reviews will ensure this Housing Strategy and Ku-ring-gai's planning controls are delivering the housing priorities in a timely manner.
- Five yearly reviews re-examining the evidence-base to identify any changes in the demographics and housing needs to ensure this Housing Strategy continues to guide appropriate housing stock in Ku-ring-gai.
- A ten-year review of this Strategy to ensure the 20-year vision, the evidence base and planning contexts align with the actions, and aims in the *Greater Sydney Region Plan* and *North District Plan*.

The monitoring reviews will include ongoing consultation and collaboration for the provision of infrastructure delivery to service projected population increases and additional housing provision within Ku-ring-gai.

The need for infrastructure to support new development and to align with forecast population growth is a key component of the *Greater Sydney Region Plan, A Metropolis of Three Cities* and the *North District Plan*. These plans have been prepared concurrently with the NSW government's ***Future Transport Strategy 2056 Greater Sydney Services and Infrastructure Plan*** and Infrastructure NSW's ***State Infrastructure Strategy 2018-2038*** to ensure that land use, transport and infrastructure planning is integrated across Sydney and the North District.

Tubbs View, Lindfield

04 References

Glossary of Terms

affordable housing

Affordable housing is housing that is appropriate for the needs of a range of very low to moderate income households and priced so that these households are also able to meet other basic living costs such as food, clothing, transport, medical care and education. As a rule of thumb, housing is usually considered affordable if it costs less than 30% of gross household income. Affordable housing is open to a broader range of household incomes than social housing.

alternative dwellings

Alternative / supplementary dwellings refer to group homes, boarding houses and secondary dwellings. Seniors housing developments in the form of aged care and nursing home facilities are also considered alternative/ supplementary dwellings, as they are not captured in the DPIE Metropolitan Housing Monitor.

average household size

The average number of people per household in a given area.

Census

The Census of Population and Housing, carried out every five years by the Australian Bureau of Statistics. It aims to accurately measure the number of people in Australia on Census night, and to gather information on their key characteristics and the dwellings in which they live. Census 2016 is the most recent Australian Census for which data is available.

dwelling completion

A dwelling is considered completed once a new water connection has been installed, or an occupancy certificate has been obtained.

dwelling approval

Permission to commence construction of a building, such as a building permit issued by local government authorities and other principal certifying authorities, contract let or day labour work authorised by Commonwealth, State/Territory, semi-government and local government authorities.

household

The household is the basic unit of analysis in this publication. A household consists of one or more people, at least one of whom is at least 15 years of age, usually resident in the same private dwelling. The people in a household may or may not be related. They must live wholly within one dwelling.

housing stress

The condition of households (in the bottom 40 per cent of income distribution) paying more than 30 per cent of their gross income on mortgage or rental repayments.

medium density

Medium density housing is housing that contains two or more dwellings on a lot. Such development consist of detached, semi-detached and attached housing. They may be single storey, two storey or three story. Medium Density housing can include units, townhouses, terraces, dual occupancies, manor houses and terrace typologies.

pipeline development

Pipeline development refers to sites with approved development applications that are under construction or have obtained construction certificates, that are not yet counted as part of dwelling completions.

residual capacity

Residual capacity refers to all existing undeveloped R3, R4, B2 and B4 zoned sites with no development applications or with approved development applications that do not yet have construction certificates i.e. where construction has not commenced. These sites have the capacity to deliver future dwellings.

tenure type

The nature of a person's or social group's legal right to occupy a dwelling. Tenure types include owner (fully owned or being purchased with mortgage), renter (private housing or public/community housing), rent free, life tenure scheme, shared equity and rent/buy scheme or other tenure.

Acronyms and Abbreviations

ABS	Australian Bureau of Statistics
B1	Neighbourhood Centre Zone
B2	Local Centre Zone
B4	Mixed Use Zone
BASIX	State Environmental Planning Policy (Building Sustainability Index: BASIX 2004)
CBD	Central Business District
Census	The Census of Population and Housing
Council	Ku-ring-gai Council
CSP	Community Strategic Plan
DCP	Development Control Plan
DPIE	Department of Planning, Industry and Environment
E4	Environmental Living Zone
EP&A Act	Environmental Planning and Assessment Act 1979
ERP	Estimated Resident Population
GSC	Greater Sydney Commission
HCA	Heritage Conservation Area
KLEP	Ku-ring-gai Local Environmental Plan
LEP	Local Environmental Plan
LGA	Ku-ring-gai Local Government Area
LSPS	Local Strategic Planning Statement
NIEIR	National Institute of Economic and Industry Research
NSW	New South Wales
R1	General Residential Zone
R2	Low Density Residential Zone
R3	Medium Density Residential Zone
R4	High Density Residential Zone
SEPP	State Environmental Planning Policy
Strategy	The Ku-ring-gai Housing Strategy (this document)

Bibliography and Data Sources

- Aboriginal Heritage Office (2015) Ku-ring-gai Council Aboriginal Site Management Report
- Australian Housing and Urban Research Institute: Whelan, S., Atalay, K., Barrett, G. and Edwards, R. (2019) Moving, downsizing and housing equity consumption choices of older Australians, AHURI Final Report No. 321, Melbourne.
- Biodiversity Conservation Act 2016
- Environmental Planning and Assessment Act 1979
- Federal Department of Infrastructure and Regional Development – Report into Lengthy Commutes
- Future Transport 2056 Services and Infrastructure Plan
- Greater Sydney Commission Greater Sydney Region Plan – A Metropolis of Three Cities 2018
- Greater Sydney Commission North District Plan 2018
- Ku-ring-gai Community Strategic Plan – Our Ku-ring-gai 2038 State Infrastructure Strategy 2018-2038
- Ku-ring-gai Development Control Plan
- Ku-ring-gai Local Centres Development Control Plan
- Ku-ring-gai Local Strategic Planning Statement, 2020
- Ku-ring-gai Local Environmental Plan 2015
- Ku-ring-gai Local Environmental Plan (Local Centres) 2012
- Ku-ring-gai Open Space Acquisition Strategy, 2006
- Landcom Housing Indicators 2018
- SQM Research – Vacancy Rates by Suburb (March 2019)
- State Environmental Planning Policy (Building Sustainability Index: BASIX 2004)
- State Environmental Planning Policy (Exempt and Complying Development Codes) 2008
- State Environmental Planning Policy No 70 - Affordable Housing (Revised Schemes)
- Transport for NSW – Household Travel Survey 2017/18

Unless otherwise stated all data has been taken from the Australian Bureau of Statistic 2016 Census of Population and Housing, and the Department of Planning, Industry and Environment's 2019 Population Projections. Where other data sources have been used, they are referenced in-text.

- Australian Bureau of Statistics (ABS)
  - » Aboriginal and Torres Strait Islander Peoples Profile (2016)
  - » ABS.Stat Region Profiles (2018)
  - » Census QuickStats (2016)
  - » Community Profile (2006, 2011 and 2016)
  - » Estimated Resident Population
  - » TableBuilder Basic
  - » TableBuilder Pro
  - » Time Series Profile (2016)
  - » Census of Population and Housing - Estimating homelessness (2016)
  - » Count of Australian Businesses (2018)
- Department of Family and Community Services – Local Government Housing Kit Database
- Department of Family and Community Services – Social Housing Wait Time Data
- Department of Family and Community Services – The Rent and Sales Report Interactive Dashboard and Past Reports
- Department of Planning, Industry and Environment – Community Profile Tool (LGA)
- Department of Planning, Industry and Environment – Demography and Housing Dashboard (2016)
- Department of Planning, Industry and Environment - Metropolitan Housing Monitor using Sydney Water Business Intelligence Enterprise Data Warehouse
- Department of Planning, Industry and Environment – 2019 Population, Household and Implied Dwellings Projections by LGA
- National Institute of Economic and Industry Research

05 Appendix

Appendix 1 - Ku-ring-gai Council Housing Strategy: Communications and Engagement Outcomes Report March 2020

Appendix 2 - Ku-ring-gai Council Housing Needs Study March 2020

Appendix 3 - Residual Capacity Maps

elton consulting

Ku-ring-gai Council Housing Strategy: draft communications and engagement outcomes report Exhibition Version, March 2020

Client: Ku-ring-gai Council

Date: 28 February 2020

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Contents

APPENDICES

1 Executive Summary

Elton Consulting was commissioned by Ku-ring-gai Council to manage and undertake the engagement and stakeholder consultation to inform the development of a Housing Strategy.

This report summarises the views, feedback and input provided by Ku-ring-gai stakeholders, and analyses the feedback from community and stakeholder engagement undertaken between October 2019 and February 2020 to inform development of Ku-ring-gai Council's Housing Strategy to 2036.

Project background

In March 2018, the NSW Government introduced amendments to the *NSW Environmental Planning and Assessment Act 1979* (EP&A Act). This included requirements for all Councils in Greater Sydney to undertake additional strategic planning, in response to priorities identified in a number of state government regional and district plans.

Ku-ring-gai Council (Council) is required to respond to the State Government's *Greater Sydney Region Plan* and *A Metropolis of Three Cities*; as well as the Greater Sydney Commission's *North District Plan*.

These regional and district plans require Council to prepare a Local Strategic Planning Statement (LSPS) which should be informed by Council's Community Strategic Plan and a Housing Strategy. These documents will provide directions on how Council will manage projected population growth in the period 2016 to 2036.

Engagement approach

Through previous consultations, including on Council's Community Strategic Plan, the Ku-ring-gai community has expressed a desire for greater housing choice for all age groups, while ensuring the natural environment, visual landscape and heritage character that are unique to the LGA are protected and enhanced.

To meet State Government requirements while responding to its community's aspirations, Council has committed to developing a Housing Strategy that sets out how they will meet the current and future residents' changing needs and manage growth, while protecting and enhancing the much-loved local character.

As a first step, Council sought to engage residents, key stakeholders and housing providers about the type of housing the community will likely want and need over the next 20 years. The outcomes of this engagement will form a key input to Council's Housing Strategy, along with detailed demographic and housing analysis, which is occurring in parallel.

Engagement snapshot

The initial community and stakeholder engagement on Council's Housing Strategy began on 15 October 2019 and concluded at the end of February 2020. The table below provides an overview of tools and techniques used as part of the consultation. Three workshops were conducted with Ku-ring-gai Councillors throughout the process to inform them of the outcomes of engagement, and enable councillors to workshop the implications for the LGA.

Table 1 Engagement tools and techniques

	Tool/technique	Description
	Online and hard copy surveys	473 responses to an online and printed survey. The online survey was available via Council's website and printed survey responses were added to these.
	Community Sounding Board	A Community Sounding Board was established to provide a forum in which Council's project team could test and receive feedback on inputs to the Housing Strategy. There have been three meetings of the 15 person Sounding Board, with a final meeting to provide feedback to the Community Sounding Board to occur post this report.
	Focus groups	Three focus groups, attended by 39 people, were held to delve into, and obtain their insights into, specific demographic and geographic issues relevant to the Housing Strategy.
	Stakeholder interviews	Ten stakeholder telephone interviews have been conducted. These stakeholders came from the aged care, property development, architecture, real estate and transport sectors. A further interview is scheduled with NSW Schools Infrastructure to discuss school capacity which has emerged as a concern among engagement participants.
	Community Workshops	Six community workshops have been held attended by 111 people. Four of the workshops were focussed on a geographical area, one workshop gathered resident action groups representatives and the sixth workshop targeted youth in the Council area.
	Project webpages	A number of dedicated project webpages were provided on Council's website to provide an overview of strategy development, easy access to engagement opportunities and answer key questions. The pages attracted over 2,331 page views and 1,931 unique page views between 15 October 2019 and 27 February 2020.
	Advertisements	Advertisements were placed in the North Shore Times, Hornsby Advocate, The Vision China Times, The Vision China Times WeChat channel, the Sydney Observer Magazine and Facebook. The advertisements encouraged people to visit Council's website, complete the survey and attend community workshops. The Facebook advertisement appeared 16,481 times, to 7,556 people. Of these, 107 people clicked the link.
	Emails and e-news articles	Those who made a submission on Council's LSPS were emailed details of the consultation to inform the Housing Strategy and how they could provide input. Articles were also placed in three of Council's e-newsletters, encouraging people to visit the website and complete the survey. These emails and e-news articles reached over 30,000 people.
	Social media	Posts on Council's Facebook channel encouraged people to complete the survey and find out more about the Housing Strategy, the posts reached 16,233 people. 4 Facebook posts were distributed. An additional Facebook advertisement was utilised to recruit people for the workshops.
	Postcards, posters and newsletters	To encourage people to visit the project website and complete the survey 3,900 postcards were distributed at key Council locations and transport hubs; 20 posters installed at key Council locations; and 500 English, 300 Chinese and 200 Korean newsletters distributed.

Key findings

There was a significant number of comments throughout the consultation process to inform the Ku-ring-gai Housing Strategy. The key findings have been summarised in this report and organised into key themes that have emerged from the consultation process to ensure readability. The following key themes emerged across engagement activities.

A strong desire for a more diverse range of housing, and in particular townhouses/villas/terraces as the current supply of these housing types is limited

This type of dwelling was seen as highly desirable by older people

In open-ended responses in the community survey, townhouses/villas/terraces were cited as the most desired dwelling type. Many comments noted that the availability of this type of villa/townhouse was low. In community survey respondents over 56 years of age, townhouses/villas/terraces were the type of home that was nominated the most to best suit future needs. It was also noted in a variety of workshops that this option should be available to downsizers and young families due to housing affordability concerns.

A real estate agent interview confirmed that townhouse, terrace and other smaller housing products were in high demand in the LGA, particularly for older people looking for lower maintenance options with a small garden. The comment was also made during the interview that there could be an option for making better use of existing landholdings (attached dwellings, repurposing existing dwellings) as another way to increase the level of housing provision without drastically changing the character of the Ku-ring-gai LGA.

Ability of property owners to subdivide land and/or existing houses presents a unique opportunity to accommodate more people while maintaining Ku-ring-gai's character

Most consultation feedback stated that the concept of manor houses (those that essentially look like single dwellings that are either new or existing subdivided houses) were seen as a key opportunity in the LGA to maintain character, reduce maintenance burdens and increase housing supply.

The Community Sounding Board and most workshops expressed the need to make better use of existing housing stock or land resources. Subdivision or conversion of houses was a key feature of outcomes of one of the focus groups in Lindfield. Some open-ended responses in the community survey noted that the size of blocks in Ku-ring-gai was no longer suitable and that subdivision should be considered. This concept also emerged as a desirable housing option in most community workshops.

In an interview with a real estate agent, it was commented that attached housing or subdivision of housing could be a viable solution to increase the level of housing stock in the LGA without substantially changing the nature and attractiveness of the local area, if done in a controlled way. It was also noted that more relaxed controls related to secondary dwellings could also provide a mechanism to increase housing supply (at present the size was too small to be an attractive option).

Some opposition to high density/apartments but others expressed it was appropriate in some locations

There was a position among a number of community engagement participants that Ku-ring-gai had delivered sufficient housing over the last ten years. 25% of survey respondents in open-ended questions specifically mentioned that there was already sufficient housing or there should be no additional housing/apartments. The participants in the workshops brought out reasoning behind people's views.

Opposition to increased housing was most strongly expressed in the workshop for Resident Action Groups held in February 2020 and the Focus Group that was held on 10 December 2019. Many participants suggested that housing targets had been met and that infrastructure studies conducted in 2000 suggested there was no more water, sewer and traffic capacity in Ku-ring-gai. A few of the other focus group and workshop participants echoed this view with some expressing concern over land values if additional housing is delivered.

Community members in focus groups and workshops expressed that increasing the diversity of stock is essential and that targeted areas (such as rail stations and key infrastructure areas) could have high density living.

Other community members and stakeholders in workshops recognised there needed to be some increase in density in centres cores in order to revitalise the centres. A number of participants in workshops expressed that many centres were presently dysfunctional (mainly Turramurra and Gordon workshops) and needed renewal, activation and revitalisation to encourage social and cultural opportunities. It was therefore seen that high density may be the "trade off" to achieve a revitalisation of the centres.

Most workshop and focus group participants recognised that revitalisation of centres was required. Most, however, did not accept that 10-15 storeys would be required in some centres, or in the case of Gordon, 20 storey development to achieve revitalisation.

Most workshop and focus group participants expressed concern that higher density will change the nature and character of the local area. Most participants did not want the Ku-ring-gai centres to be like Chatswood or St Leonards.

Younger community members expressed that higher density development must be done in parallel with transport improvements; with a range of the community specifically mentioning the need for car and bike commuter parking. Older participants at the workshops also echoed this view, but suggested alternate transport mechanisms, such as smaller shuttle buses.

Older community members identified the need for downsizing from their larger homes and properties, which is a driver to support a change in housing diversity.

Others expressed that if any increase in density is required, medium density in controlled areas is preferred. High density does not suit Ku-ring-gai's character.

Stakeholder interviews on the key issue of density in centres revealed that the feasibility of redevelopment of centres was not possible under current planning controls. They noted that the land within the centres needs to be 'unlocked' by introducing more feasible planning controls.

Substantial uplift in planning controls was required to make redevelopment in some business zones in centres viable (above the 10 – 15 storey mark). Many noted the amalgamation of sites was a key barrier to providing housing diversity particularly due to land value, thus uplift in planning controls was needed to address housing needs.

The Sydney Water Growth Servicing Plan 2019 – 2024 aligns water and wastewater infrastructure delivery with District Planning processes. No infrastructure augmentation requirements are indicated in the growth servicing strategy for Ku-ring-gai. Water utility availability is further assessed at rezoning and Development Application stage in consultation with utility providers.

Additional housing and any increases in density must be delivered in a way that protects Ku-ring-gai's character and heritage

People that supported there being some change in growth in housing, as well as those that were against it, felt that protecting Ku-ring-gai's green character, tree canopy, heritage and biodiversity was critical.

Delivery of additional green space and parks was noted by virtually all workshop participants as critical to provide amenity to residents, especially if there was to be additional housing. Increased green space should occur in conjunction with development.

There was concern in some workshops about the interface between the Heritage Conservation Areas and potential change with new housing adjoining them. This was particularly mentioned in regards to Lindfield and Gordon.

Some workshop participants questioned the heritage value of some shopping strips in centres such as Lindfield, and expressed the potential for revitalisation in some of these areas.

The residents action group FOKE noted that there was 'cherry picking' of some sites by developers and that expanding the breadth of development away from the centres may further reduce the take up of sites closer or within the core, further undermining the broader green character of the area.

Design considerations to suit the area

Improved design considerations to fit the local character was raised in a number of forums and workshops. Many in the youth group noted that the design of apartments often did not promote the acceptability of change in the area. The Community Sounding Board noted that there should be a Ku-ring-gai style developed, including the use of brick and trees.

Centres approach and infrastructure

In the community survey, access to public transport and shops was nominated as being important in terms of desirability of location, however transport accessibility was not as strong as the desire for typologies of housing. Accessibility to public transport was key among younger and older respondents.

Workshop participants expressed concerns of the ability for infrastructure to cope with increased housing in centres, noting that many centres were already highly congested, there was a lack of parking and generally there were poor east-west connections.

Many participants and survey respondents felt there was not the infrastructure to support additional housing, particularly traffic, open space and community facilities. Others felt that any additional housing must be accompanied by improved infrastructure and improvements to transport.

Workshop and Sounding Board participants (particularly Turramurra and St Ives) commented that there were also other key attractors, such as schools, particularly for families in the area. They felt that the approach to considering housing should be broadened to school locations and other areas.

A key comment from the workshop participants, particularly St Ives and Turramurra, was about interconnecting transport to key mass transit hubs. They felt that it was more important to be in close proximity to schools for their children, but with better access to mass transport through interconnecting services such as smaller mini-buses or 'on-demand' services. Improved bus operation was viewed as important to support any housing. Participants also expressed concern about school capacity.

Many workshop participants expressed that some of the neighbourhood centres could benefit (such as additional viability, patronage of the centres and activation) from some increase in housing surrounding them. Examples included West Pymble and North St Ives, which may also benefit from the delivery of a mass transit solution along Mona Vale Road. South Turramurra was also nominated as a key opportunity.

A stakeholder interview was undertaken with Transport for NSW (TfNSW) on centres, and transport and key themes emerging from the community consultation are provided below.

There was recognition of the congestion within centres and the need to find alternative “non-private-vehicle-based transport”. There is an acknowledgement within TfNSW that further work does need to be done on interconnecting transport (i.e. on-demand services and smaller buses) to increase efficiency of movement to the centres.

There was an acknowledgement that east-west connections require improvement in centres.

The Housing Strategy should be explicit about the transport improvement dependencies to trigger and enable development. Examples of this are:

» improvements in capacity as a result of the second Metro completion into the CBD

» assessment of road capacity after the completion of North Connex in assessing development proposals that emerge from the Housing Strategy

» aligning any increased housing development in St Ives with a mass transit solution

» the potential for alternative interconnecting services to improve the function of centres with the potential to interconnect with other key attractors such as schools, in addition to active transport initiatives.

Housing affordability is a key concern for younger residents, older residents, young families and key workers requiring accommodation

In a variety of forums, many expressed the need for more affordable housing options and the ability to release equity tied up in larger homes. The lack of affordable accommodation forces key workers to either travel considerable distances to work or request on-site accommodation in work locations such as aged-care.

In an interview with a community housing provider, one of the key concerns is older women over 55 who are experiencing acute housing stress. Clear policy, partnerships and joint ventures provide the most successful pathways to deliver affordable housing.

Interviews with aged care providers revealed that they are increasingly investigating providing onsite worker accommodation due to concerns about attracting key workers to the field due to housing cost.

Housing for the ageing community

With regards to housing for an ageing population, the following provides some key outcomes from stakeholder interviews.

A key provider of aged care and retirement village product noted that older retirees were increasingly interested in residing near centres. They noted that housing stress among seniors is somewhat hidden (asset rich but cash poor) in LGAs like Ku-ring-gai, but was definitely there and likely increasing. It is important to keep the integrity of SEPP Seniors Housing so that housing needs for the aged can be met.

There are increasing constraints to developing co-located aged care and retirement living which is generally the preferred model. However, it is extremely difficult for providers to find sites that are large enough to accommodate this retirement living and they can compete with other types of residential development.

In an interview with an aged care industry architect it was noted that some of the smaller centres provided the best opportunity for access to services, but the right type of landholdings to deliver more affordable product was a constraint. It was noted that deep soil/tree preservation controls often made it difficult to make seniors living development viable.

One aged care service provider noted that the improvements in Lindfield had generated a lot more walking activity among older residents and this was key to maintaining independence. Exploring the benefits of a hub model for older people should be undertaken (a range of services in centres cores that older people have access to and possibly aged care/respite in some buildings). As in-home aged care services become increasingly constrained, the hub model may provide a more sustainable alternative.

Mixed views about housing to support young adults residing in the LGA

There were mixed views in some community forums and workshops towards the fact that there is a very low proportion of young adults living in the LGA. Some expressed that it was a family area and this should not be changed. These people indicated that younger people could move closer to the city to enjoy a vibrant lifestyle. Others, including community survey respondents and workshop participants, expressed that housing to support younger people should be provided and that suitable housing typologies should be delivered. Many participants in the youth workshop acknowledged that housing cost and lifestyle factors were a reason for younger people leaving the area.

Some open-ended responses in the community survey and youth workshop participants noted that medium and high density, close to the station would assist to retain youth in the area. Others expressed a need for a diversity of housing and a more widespread approach to support youth residing in the area.

Geographical Centres Workshops

To facilitate discussion with the community in workshops, three indicative housing scenarios were developed for the centres of Lindfield, Gordon, Turramurra and St Ives. These were not Council-endorsed but simply to facilitate discussion about various housing options. In each case:

» **Scenario 1** provided a broader spread of potential change with areas around the cores of centres to provide manor houses (conversion of existing dwellings to provide housing for more than one household, attached dwellings and in some cases land subdivision). Centre cores would have more limited uplift but sufficient to promote revitalisation

» **Scenario 2** provided some further density in the cores and more limited areas of housing diversity surrounding the cores

» **Scenario 3** generally focused change in the core of centres, with more limited housing surrounding the centre.

Lindfield

In the community workshop focussed on Lindfield, there were mixed views where some participants expressed a desire for a combination of Scenario 1 (attached/manor house over a broader area with lower scale in the core) and others preferred Scenario 2 (more of a townhouse focus). Others were more in favour of Scenario 2 where the breadth of change is not as wide, but delivers diversity of housing through townhouses.

Overall workshop participants thought the focus within the centre defined area should be on townhouses, as well as repurposing existing dwellings. They felt that the latter could address multi-generational housing needs and make better use of current housing stock while maintaining character.

The youth group suggested there should be a mix of housing types with density at the station (Scenario 1 or 2).

The Sounding Board preferred a mix of Scenario 1 and 2 with green space being a critical factor in any higher density development.

All expressed a need to improve east-west connections and improve the level of infrastructure within the core. Many expressed that the Lindfield Hub would improve infrastructure.

FOKE was of a different view and commented that the focus should be on the Council stopping developers ‘cherry picking’ sites within the Lindfield core. Broadening development options around the core may exacerbate this.

Gordon

There was preference for Scenario 1 or 2 in group discussions in the community workshop focussed on Gordon. This was due to most participants not wanting too many high-rise buildings in the centre (not like Chatswood).

There was a preference for a diversity of dwelling types to be delivered surrounding the core. If building of apartments is to occur some mentioned a preference for apartment buildings to be 10 storeys or less – and definitely not 20 storeys. The Sounding Board concurred with the storey height limit. There were specific comments from participants who did not believe that 20 storeys would be required to make redevelopment economically feasible.

While the Resident Action Group workshop was generally against additional dwellings being provided, some recognised that Gordon was a focal point in the LGA.

The opportunity for the Pacific Highway to go underground to improve amenity in places, like Gordon, was raised at the workshop and the Sounding Board.

Some resident action groups acknowledged that there was a need to revitalise the shops however negotiations on the height of the development should occur carefully so to balance revitalisation whilst retaining well designed apartments. It was acknowledged that this may require compromises on both council and developer sides in order to ensure public benefits.

Ensuring that housing design can blend with interface areas was considered critical by the Sounding Board.

A lack of open space was generally noted by all participants in all workshops and this should be a key goal in any redevelopment within Gordon.

The youth group recognised that Gordon is in need of revitalisation and that there may need to be a trade-off in terms of height to get a better functioning centre.

Turramurra

In the community workshop focussed on Turramurra, workshop participants suggested that other areas should be considered for housing growth that have not been identified at the workshop (such as South Turramurra with improved interconnecting transport to the train station). Participants also commented that an option that should be considered for additional housing diversity in areas close to schools.

Many workshop participants and the Sounding Board acknowledged that Turramurra centre needs revitalisation and that a compromise with height was likely the only way to achieve it. There was support for the Turramurra hub project expressed by participants. The Sounding Board stated that good design outcomes should be a key consideration in housing diversity within the centre.

One resident who could not make the workshop said that he felt that development should focus on the core of the centre to provide the dual benefits of revitalisation and diversity of housing. Like this resident, some of the participants at the Turramurra-focussed workshop said they prefer to keep redevelopment to the core of Turramurra.

Other participants expressed a ‘no more housing, no more people’ perspective or that other parts of Turramurra should take its share. The resident action group workshop generally expressed that there was too much development and that Turramurra should retain its character as it is.

The Youth Workshop suggested that the Turramurra Hub was a good initiative with the more compact scenario preferred (Scenario 3), but it should also consider the inclusion of some townhouses to offer diversity.

St Ives

In the community workshop focussed on St Ives, some participants did not like any scenario suggesting that St Ives was too constrained. Other participants suggested there may be an opportunity for mixed use development at the shops but that it should be of modest height (not ten storeys). There were diverging views within the focus and workshop groups.

In considering the scenarios, if growth had to occur when improved transport was delivered, some participants were generally in favour of Scenario 1 but with modifications. There was comment that the transitions between some land uses was too severe (e.g. between 5-6 storey apartments to attached/manor-house typologies).

There was some particular concern about SEPP Seniors Living housing that dominated discussion at one workshop group, with one or two participants discussing the lack of amenity and dilution of character this form of housing creates.

Some participants at the workshop thought that other areas, like around Pymble Station, would be better suited to development with some housing. The comment was made that the shops were sub-standard in Pymble and that housing may assist in improving the centre. They expressed that Pymble also required ‘downsizing’ housing options. They also thought there were other opportunities around schools and other centres that have not been considered in the approach to the Housing Strategy.

It was also expressed that other locations within the St Ives area should be considered, particularly around schools or on main roads, not just a focus on the centre.

The youth workshop nominated Scenario 2 (a more townhouse focus) for St Ives as it provided the best mix of typologies with a balanced height in the centre.

The Sounding Board nominated an alternative option, between Scenario 1 and 2, while acknowledging that transport is a key issue.

Community Sounding Board discussion of issues and housing vision principles

The role of the sounding board was to allow council to test ideas and feedback. Some of the key issues or supporting outcomes that were identified by the Community Sounding Board based on the results of the survey and review of workshop comments are noted below.

» The need for improved transport and infrastructure, as infrastructure provision has the ability to impact who could be attracted to the area. The attendees discussed that there is some tolerance for housing density, provided there is infrastructure to service it. Comments were made that infrastructure can help drive demographic change, not just respond to it.

» Desire for variety and choice for housing (for example, small townhouse with a small garden) - there is a need for different forms of dwellings, which should be appropriately sized. New housing options should accommodate the changing circumstances of residents.

» Support emerged from the Community Sounding Board to consider renewal or subdivision of existing housing/subdivision options. A key comment by one Community Sounding Board member was:

  ‘I am shocked at the amount of under-occupancy (of dwellings) shown in the table, and the lack of housing suitability in the area. Subdivision would be a great solution to this, the current minimum lot size is crazy. Why is it so large in Ku-ring-gai?’

  Community Sounding Board member

» There is recognised opposition to high density, however the view was that there could be support for density in clearly defined areas. The Sounding Board noted the importance of Council coming up with the correct ‘density formula’ in centres. It was further raised that Council has an opportunity to show leadership through development carried out on its own land holdings.

» Elderly residents fear having to leave the area as a result of the lack of suitable housing. It was commented that there is a desire for existing residents to be able to stay in the same area, and therefore, it was considered important that there be a mix of demographics accommodated (for example, multigenerational housing and townhouse typologies) in the council area.

- The group noted that the desire for the preservation of the tree canopy should not be viewed as a stance against development. Rather appropriate development with construction materials and design quality that can complement the tree canopy should be considered, with the desire for a Ku-ring-gai style. Examples of this character provided by the Sounding Board were the use of brick and trees around buildings.
- Heritage/character should be respected when planning within the LGA.
- Desire for increased social amenity (for example, dining opportunities) within the centres.
- Desire for high quality housing and design.
- The importance of key worker accommodation/affordability - participants discussed that the role of Council is ensuring housing affordability for key workers (and affordability more broadly), which is particularly important given the healthcare sector is the major employer within the LGA and aged care is an important community service.
- Mixed views about housing to support young adults residing in the LGA.

The Sounding Board were asked to propose some **principles for the housing vision** in order to inform council in developing a housing strategy. The following were suggested:

- maintain the character of Ku-ring-gai LGA
- develop no higher than 10-15 storeys, otherwise the jump from general 1-2 storeys is too large and creates a different mindset to the area – graduation of height
- develop a mix of housing / typologies to provide a better range to fulfil the community's desires, particularly the attached/manor house and townhouse style, rather than the current dichotomy of detached houses / apartment housing stock
- blend the interfaces between new housing and the surrounding environment
- develop good quality, architecturally designed buildings with a designated 'style' for higher density developments in Ku-ring-gai
- utilise good quality materials and colours (such as brick) that blend in with existing character housing
- provide additional open/green space where additional housing or denser living is to occur
- housing should implement environmentally friendly sustainable buildings, for example require solar panels on a unit block
- include multipurpose social spaces (for example, sports facilities with cafes should be part of all key centres)
- housing should be supported by safe, active and alternative transport infrastructure (pedestrian, cycling, scooter) and shuttle buses, parking, paths, tracks, end of trip facilities
- developments should avoid direct entry/exit onto Pacific Highway to enhance safety and minimise congestion
- traditional owners of the land to be acknowledged in planning.

2 Introduction and purpose

Elton Consulting was commissioned by Ku-ring-gai Council to manage and undertake the engagement and stakeholder consultation to inform the development of a Housing Strategy.

Project background

In March 2018, the NSW Government introduced amendments to the *NSW Environmental Planning and Assessment Act 1979* (EP&A Act). This included requirements for all Councils in Greater Sydney to undertake additional strategic planning, in response to priorities identified in a number of state government regional and district plans.

Ku-ring-gai Council (Council) is required to respond to the State Government's *Greater Sydney Region Plan* and *A Metropolis of Three Cities*; as well as the Greater Sydney Commission's *North District Plan*.

These regional and district plans require Council to prepare a Local Strategic Planning Statement (LSPS) which should be informed by Council's Community Strategic Plan and a Housing Strategy. These documents will provide directions on how Council will manage changing housing needs in the community and projected population growth in the period 2016 to 2036.

Project phases and approach

The engagement program to inform the development of a draft Housing Strategy were:

Phase 1 - Community Survey and Focus Groups: The Community Survey mainly focussed on current and future housing need or desires in the community and focus groups to explore with the community thoughts on forecasts of population trends as well as gaining insights into their hopes and desire for housing in the LGA. Interviews with key stakeholders on these issues also contributed developing themes for the next phase.

Phase 2 – Community Workshops: Council staff prepared a range of potential housing scenarios for the four nominated centres in the Local Strategic Planning Statements, based on the outcomes of consultation with the community in Phase 1, capacity and urban design analysis as well as feasibility of development considerations. These scenarios were not endorsed by Councillors but were designed to facilitate discussion in the workshops. Four workshops were held focussing on the four centres of Lindfield, Gordon, Turramurra and St Ives. A further workshop was held for Resident Action Groups exploring all four centres. A youth focus group was also held to ensure the perspective of younger adults was incorporated in the consultation. The key objectives of the workshops were to get input from the community regarding the mix of housing typologies desired, the preference for broader change or a more compact approach focussing on the core of centres, other locations they thought might be suitable for housing and other considerations they thought were important. Another round of interviews with stakeholders from government agencies and professionals working in or affected by the housing sector in the LGA were undertaken to provide their perspective on housing needs in the LGA.

A Community Sounding Board was convened to review the outcomes of engagement at critical phases to assist with reviewing and consolidating the engagement outcomes. This Board consisted of key stakeholders in areas such as education, aged are, affordable housing as well as community members.

Awareness campaign approach

An awareness campaign was undertaken with Elton Consulting developing content and Council staff distributing the collateral. This included:

- Dedicated Council website pages
- Newspaper advertisements in the North Shore Times, Hornsby Advocate, The Vision China Times, WeChat and Sydney Observer Magazine

- Email distributions through the following channels – people who has made submissions to the Local Strategic Planning Statement and/or had requested to be kept updated, Ku-ring-gai Library e-News and Ku-ring-gai e-News and Ku-ring-gai Sustainability e-News, with a reach of over 30,000 people. This was undertaken twice – first to encourage people to complete the Community Survey and participate in the process and secondly, to encourage people to attend workshops
- Four Facebook posts with a total reach of over 16,000 encouraging people to complete the Community Survey and participate in the consultation
- A further Facebook post to recruit people to the workshops was undertaken which appeared 16,481 times to 7,556 people
- Over 3,000 postcards advertising the consultation to inform the draft Housing Strategy handed out at stations
- Posters, newsletters, postcards and community surveys provided at over 20 community venues in Ku-ring-gai and some local businesses.

This report summarises the views, feedback and input provided and analyses the feedback from community and stakeholder engagement undertaken between October 2019 and February 2020 to inform development of Ku-ring-gai Council's Housing Strategy to 2036

3 Survey and online discussion forums

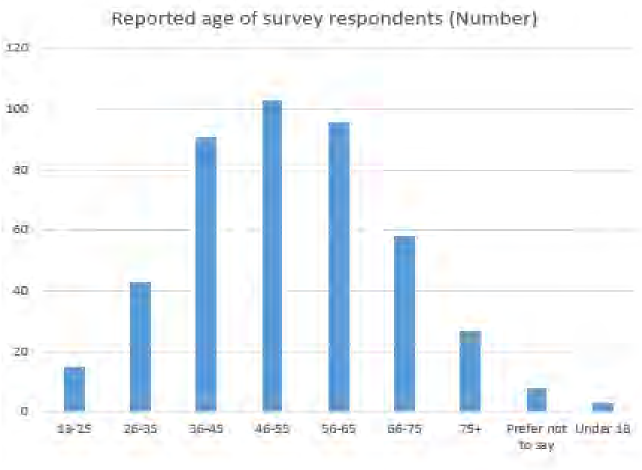
Overview

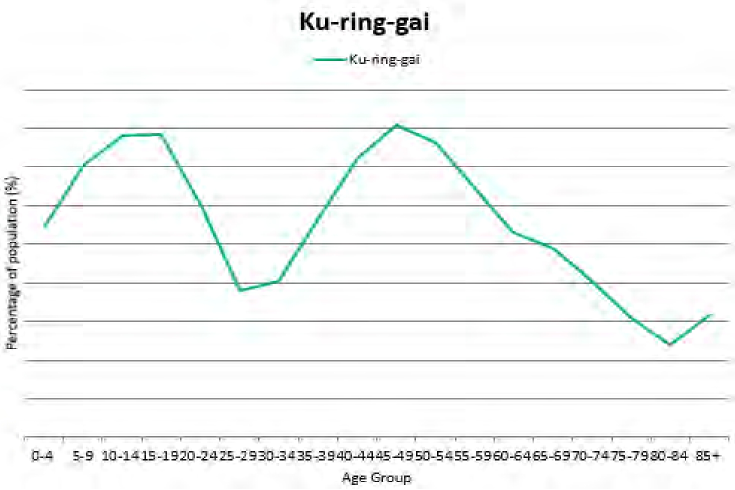
- An online survey was available via Council's project web page between 15 October and 11 November 2019, with 473 responses received during this time.
- Four issue-specific online discussion forums were also open during this time, with 273 visitors and 13 contributions. At Council's request, the forum questions were replicated in the online survey.
- To ensure responses were received beyond established issue-specific interest groups, the survey was open to all community members.
- The survey was publicised via the project website, postcards handed out at major public transport hubs and available at key Council locations, posters installed at key Council locations, social media, e-news articles and advertising.
- Key themes that emerged included:
  - the number of respondents who nominated a detached dwelling as suiting their current needs was less than the number of respondents who currently live in this type of housing
  - conversely, the number of respondents who selected a townhouse/terrace house as suiting their current needs far exceeded the number of respondents who currently live in this type of housing
  - respondents aged over 56 overwhelmingly nominated terrace/townhouse/villa housing as suiting their future needs; while those 55 and under nominated a detached house
  - around 73% of respondents thought it was very important or important for people aged 65 and over to have access to suitable housing within the LGA.

Survey participant profile

A detailed profile of survey respondents is provided in **Appendix A**. The age profile of respondents largely matched the proportions of adults in the wider Ku-ring-gai population, as Figure 1 below demonstrates. It should be noted that a youth focus group and workshop was held to ensure that younger people's views were considered as part of the consultation process more fully.

Figure 1 Comparison of age groups between survey respondents and Ku-ring-gai population.





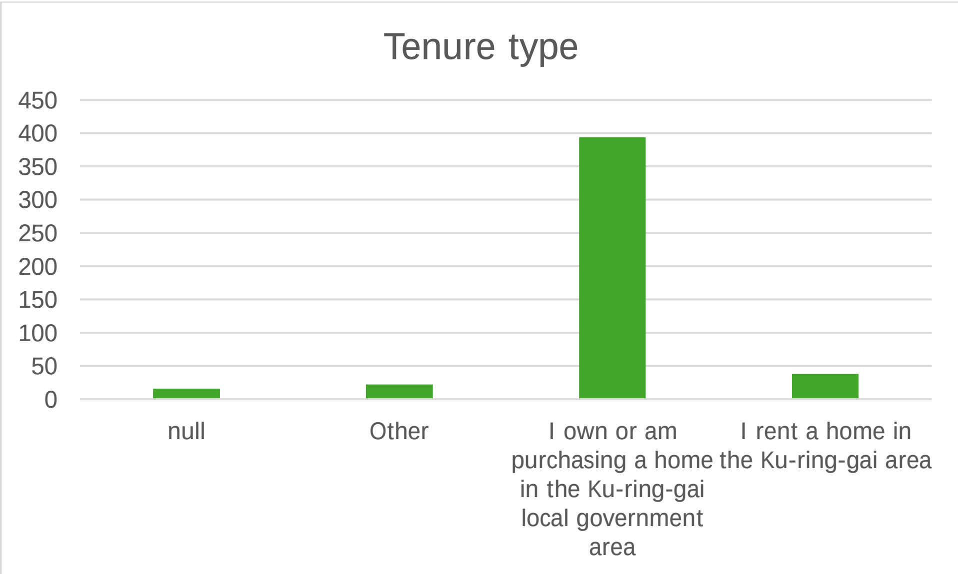
3.1.1 Analysis of responses

An analysis of responses to each non-demographic survey question is provided below. Depending on responses provided, people were directed to skip or answer certain questions. This is also noted in the analysis below.

Q7: Which of the following best describes you?

Respondents were asked to select one option from a list of tenure descriptions. Of the 470 people who responded to this question, nearly 84% (394 people) stated that they owned or are purchasing a home in the Ku-ring-gai LGA.

Figure 2 Community survey responses on tenure type of respondents

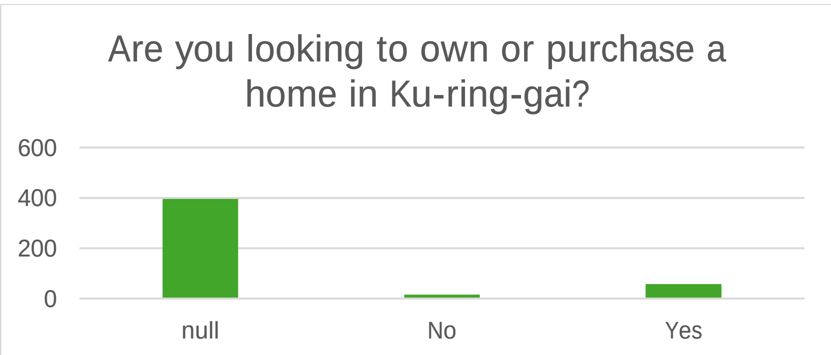


Those who answered that they were renting a home in the Ku-ring-gai LGA were directed to Question 8 while those who responded that they owned or were looking to purchase a home were directed to Question 9.

Q8: Are you looking to own or purchase a home in the Ku-ring-gai local government area in the future (tick one)?

This question was only answered by those who stated that they are renting in the Ku-ring-gai LGA in response to Q7. Fifty-seven of the 72 respondents directed to answer this question (79%) stated that they are not looking to purchase a home.

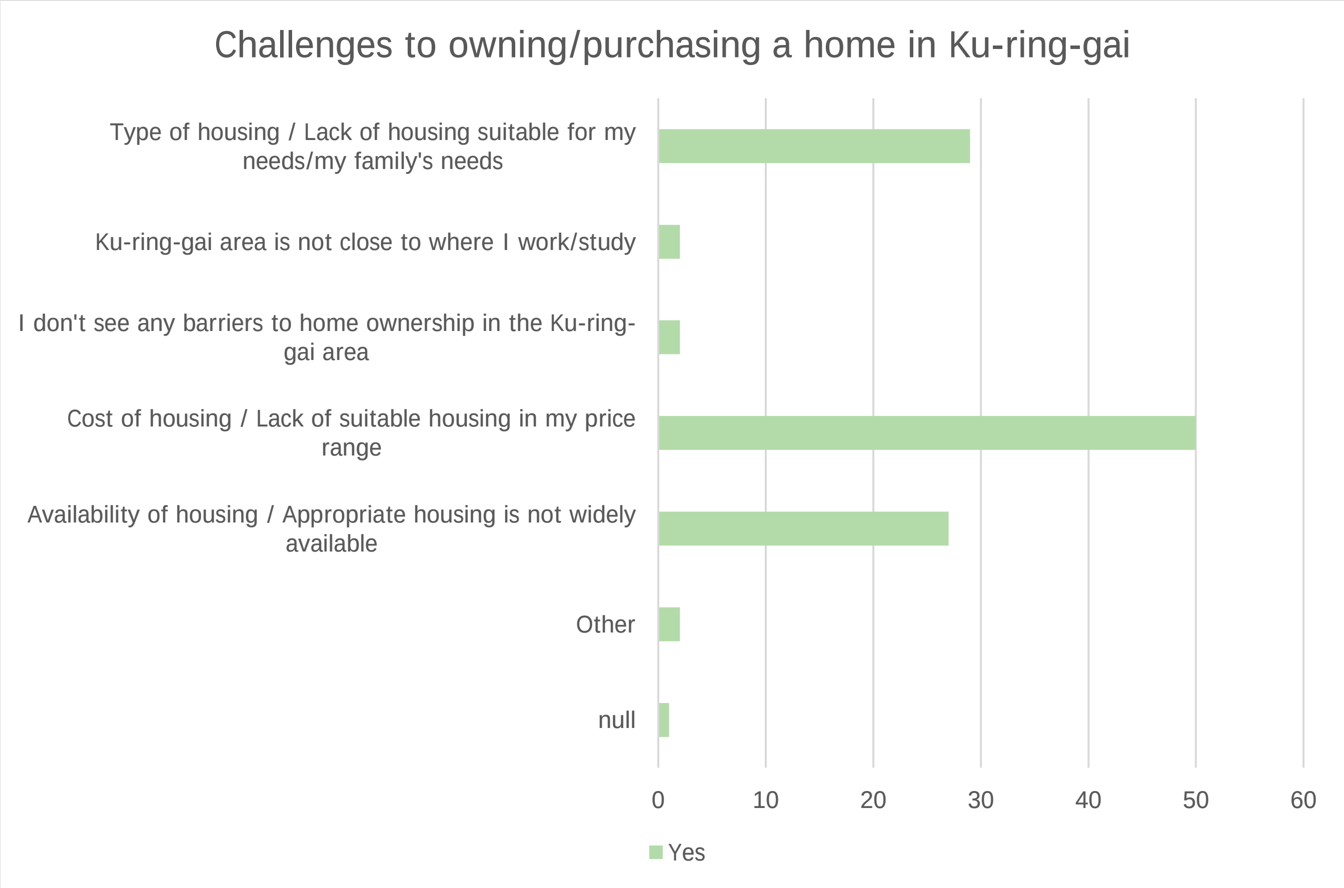
Figure 3 Community survey responses to question "Are you looking to own or purchase a home in Ku-ring-gai?"



Q9: Do you see any challenges to owning/purchasing a home in the Ku-ring-gai area (please select all that apply)?

Those who stated they own, are purchasing or are seeking to purchase a home were directed to answer this question, and were able to select multiple options. Housing affordability was nominated as the primary barrier to being able to afford a house, with 50 respondents selecting ‘cost of housing/lack of suitable housing in my price range’ as a reason for not purchasing a property in the LGA. This was followed by reasons related to housing supply, with ‘availability of housing/appropriate housing is not widely available’, and ‘type of housing/lack of housing suitable for my needs/my family's needs’.

Figure 4 Responses to questions about the challenges to owning/purchasing a home in Ku-ring-gai



Q11: What type of housing would best suit your current needs and lifestyle, taking into consideration your family circumstances? This may not necessarily be the same as the type of housing you currently live in (please select all that apply).

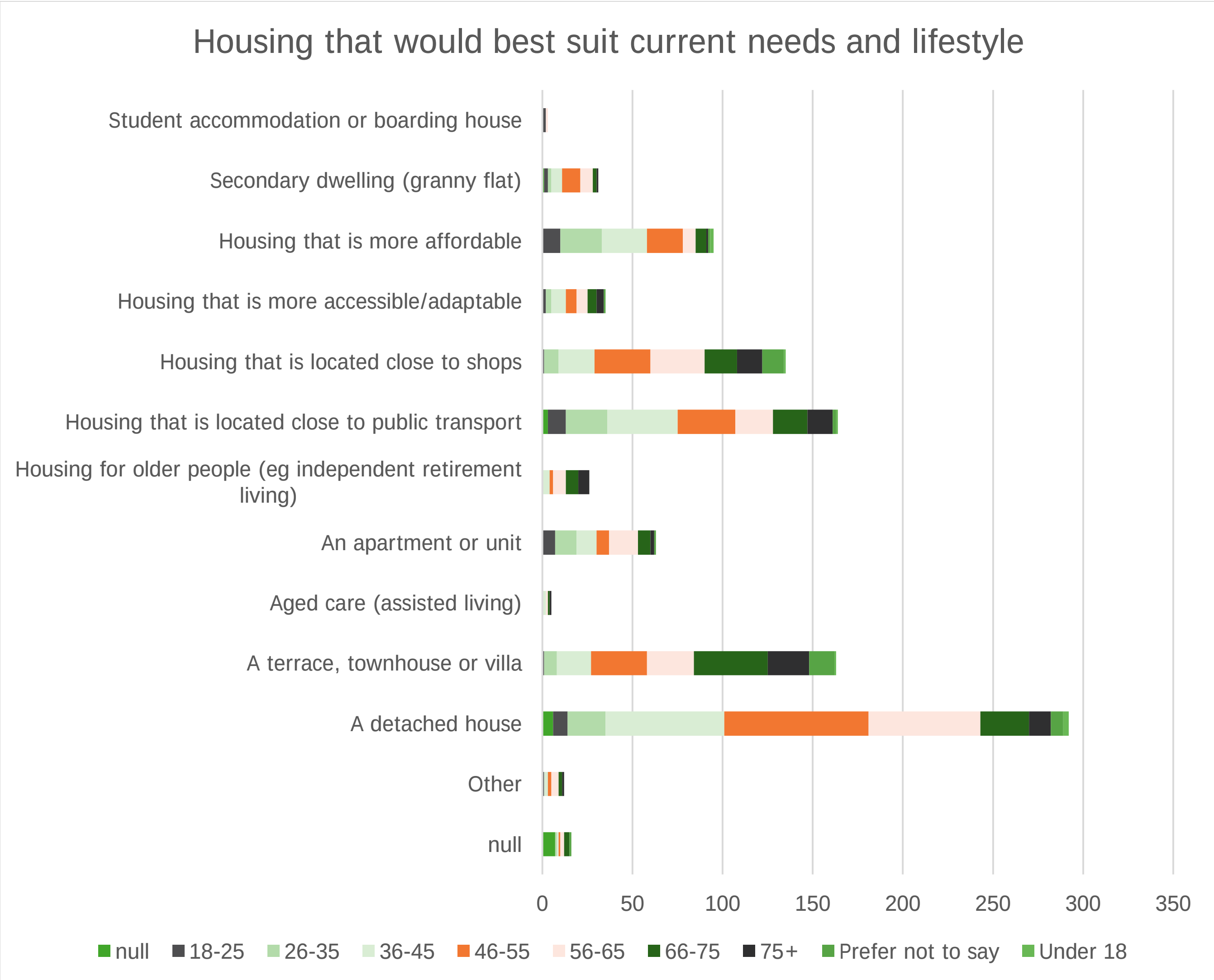
All participants were able to respond to this question.

A detached house was the most popular option, attracting 286 responses. Interestingly, this is less than the 375 respondents who stated that they currently live in a detached house. Conversely, while 13 respondents currently live in a terrace house, 163 respondents stated this type of housing would suit their current needs. This discrepancy suggests that when it comes to these two housing types, current dwellings are not aligning with current housing needs. The possible reasons for these findings was explored in the focus groups, workshops and Community Sounding Board meetings.

Housing that is located close to public transport attracted 164 responses (the second most popular option) followed closely by proximity to shops. The importance of proximity to public transport was echoed in youth focus group and Community Sounding Board discussions, while many workshop participants expressed that focussing on centres was appropriate. Other

Also, of note is that “Housing that is more affordable” was nominated by approximately 20% of respondents and was nominated by a number of age groups, not just young people.

Figure 5 Community survey questions in response to question “What type of housing would best suit your current needs and lifestyle, taking into consideration your family circumstances? This may not necessarily be the same as the type of housing you currently live in (please select all that apply).”



Q12: What type of housing would best suit your future needs and lifestyle (please select all that apply)?

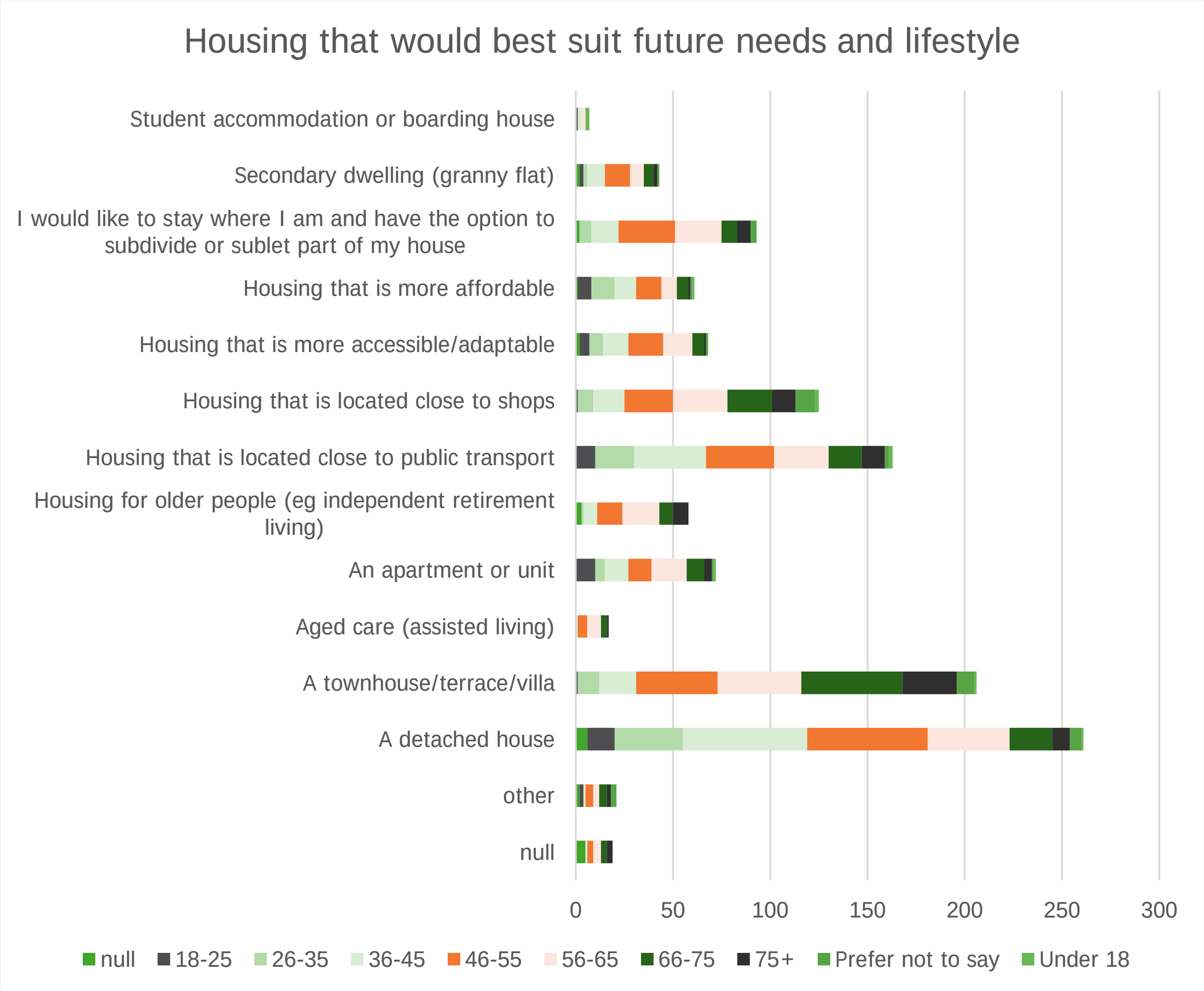
All participants were able to respond to this question.

Responses to this question followed a similar pattern to the previous question about suitability to current needs.

Once again, a detached house was the most popular option, attracting 261 responses contracting further compared to the question about housing that would suit current need. This was followed by terrace/townhouse/villa style housing which attracted 206 responses attracting even more responses than the current housing need, far exceeding the 13 respondents who currently live in this style of housing. In respondents over 56 years, terrace/townhouse/villa style housing was the most selected.

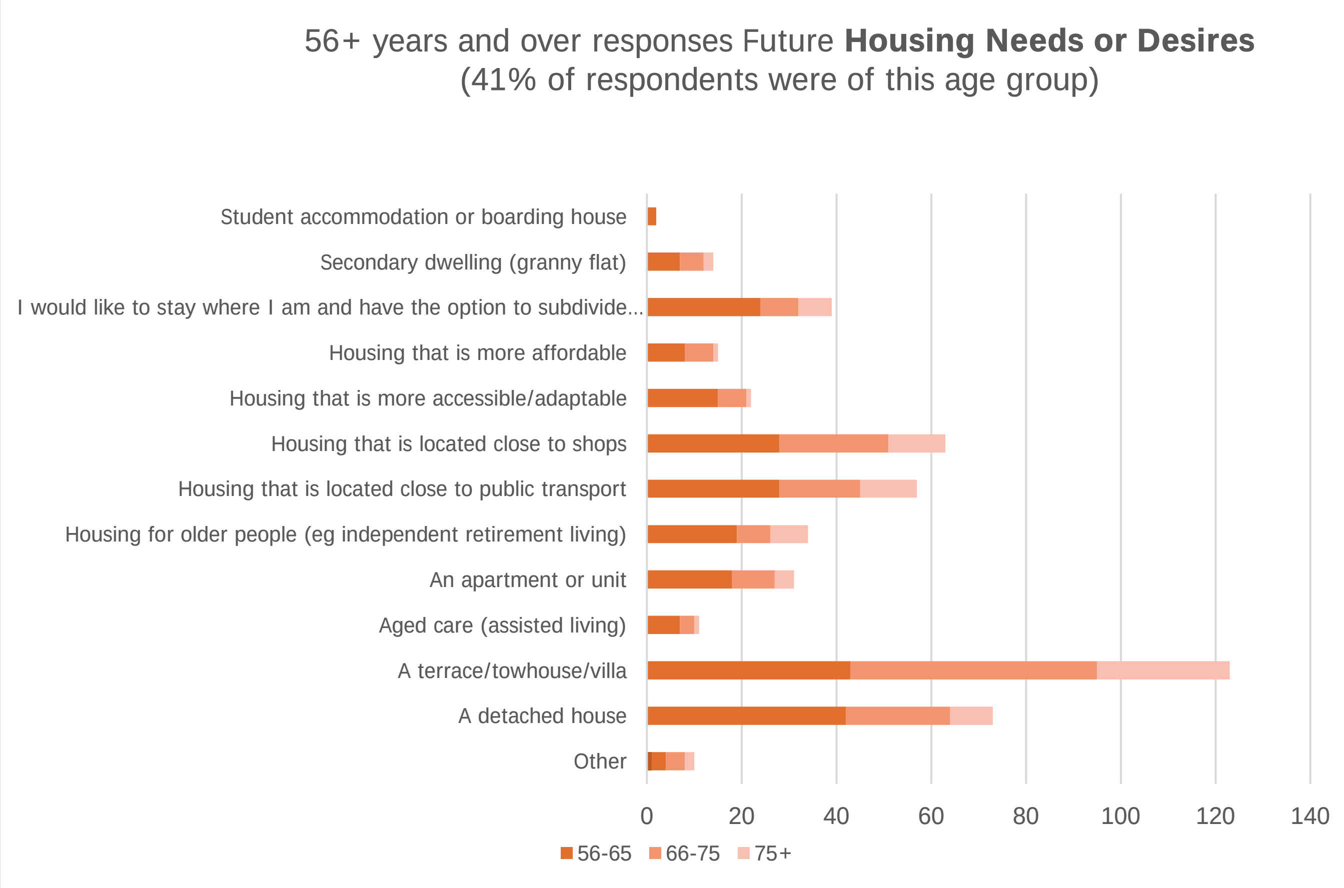
Housing close to public transport was the third most popular selection with 163 responses.

Figure 6 Community responses to question What type of housing would best suit your future needs and lifestyle (please select all that apply)?



The above graph is also replicated below (Figure 7) for community respondents 56 years and over only. The desire for terrace/townhouse/villa style housing overtakes a detached house and housing that is close to shops and public transport still features strongly.

Figure 7 56 years and over responses to future housing needs or desires



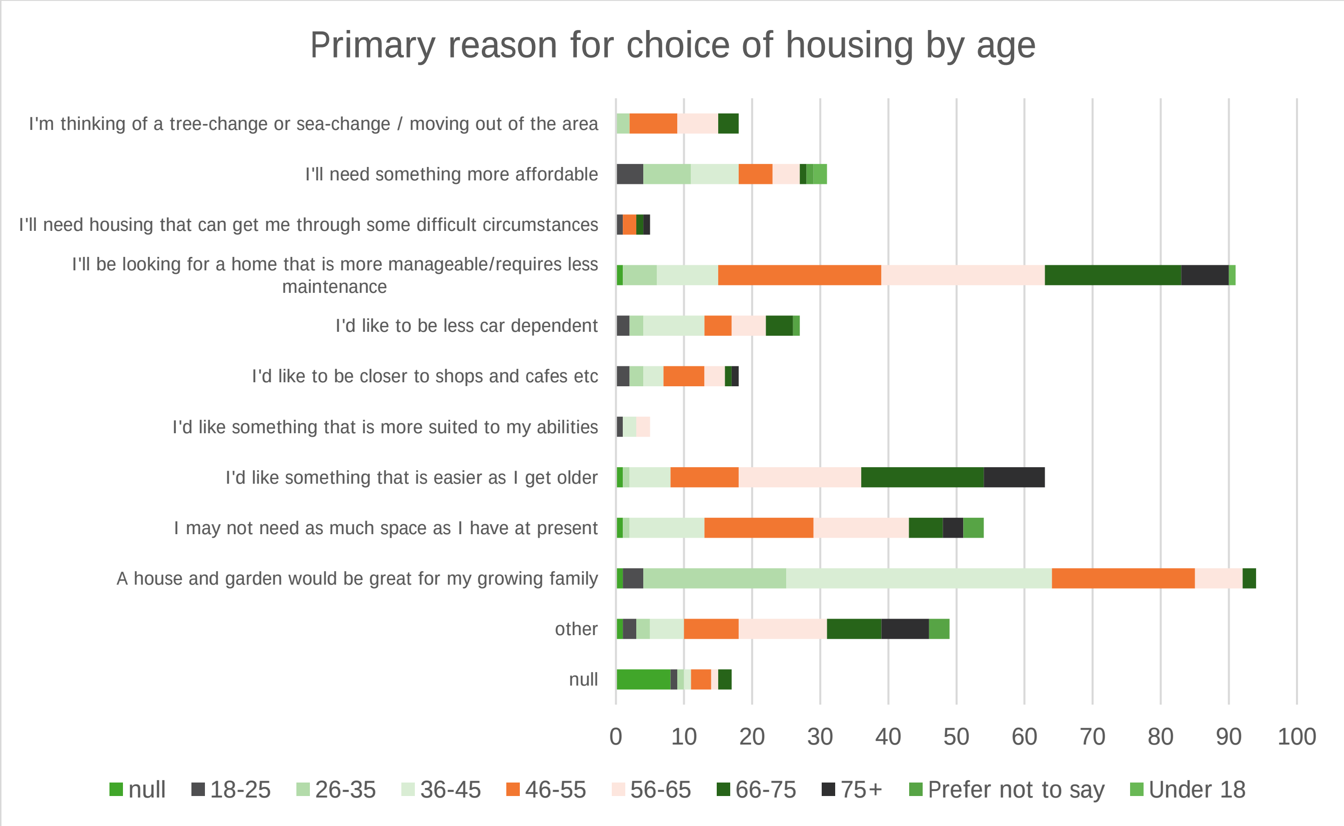
Q13: What is the main reason for your response to the above question about the type of housing that would best suit your future needs or lifestyle (please select one only)?

All participants were able to respond to this question.

Responses to this question appeared to represent different life stages. 'A house and garden would be great for my growing family' was the most popular option, with 93 responses. Respondents who most selected this option were aged 36-45, with 39 of the 93 (or 42%) from this age group. The 26-35 and 46-55 age brackets each contributed 21 of 93 responses (23%).

'I'll be looking for a home that is more manageable/requires less maintenance' was the second most popular option, with 89 responses. The 46-55 and 56-65 age brackets each contributed 24 of 89 responses (27%); with respondents in the 66-75 age bracket accounting for 20 of 89 responses (22%).

Figure 8 Community survey responses to question about primary reason for choice of future housing

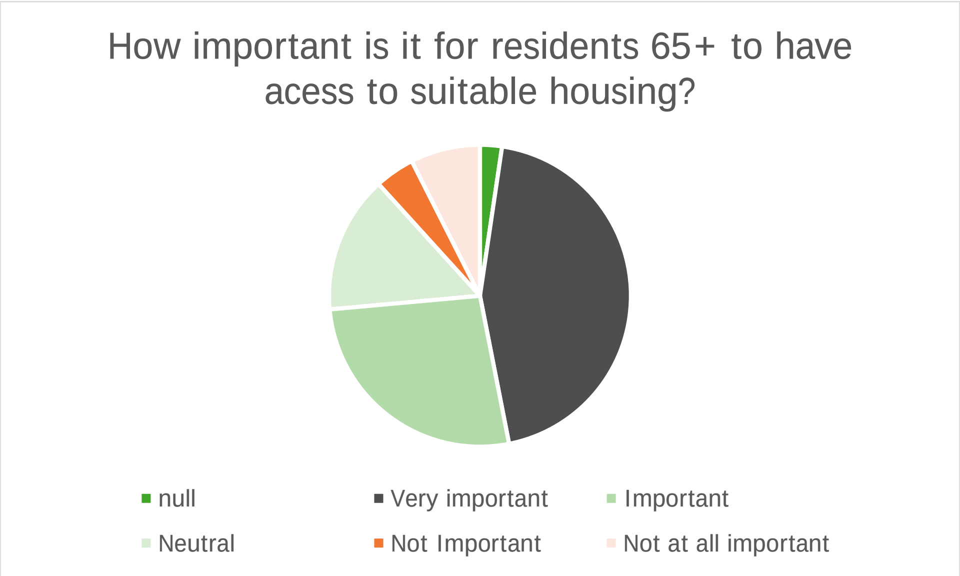


Q14: In Ku-ring-gai the proportion of people aged 65+ years is projected to increase substantially over the next 20 years. How important is it to you for people aged 65+ years to have access to suitable housing within the local government area (tick one)?

All participants were able to respond to this question.

Of the 458 responses received to this question, 334 respondents (or 73%) felt it was important or very important for residents aged 65 years and over to have access to suitable housing in the LGA. In focus group and Community Sounding Board discussions, and stakeholder interviews, there was much (differing) discussion about what would constitute suitable housing for these residents.

Figure 9 Community survey response to question about the importance of people over 65 having access to suitable housing



Q15: Please tell us a bit about your response to the above question.

All participants were able to respond to this question.

Some comments provided included:

» suggestions for townhouses rather than apartments

» dwellings with a small garden

» the need for age diversity in housing

» desire to subdivide land, including for the provision of granny flats.

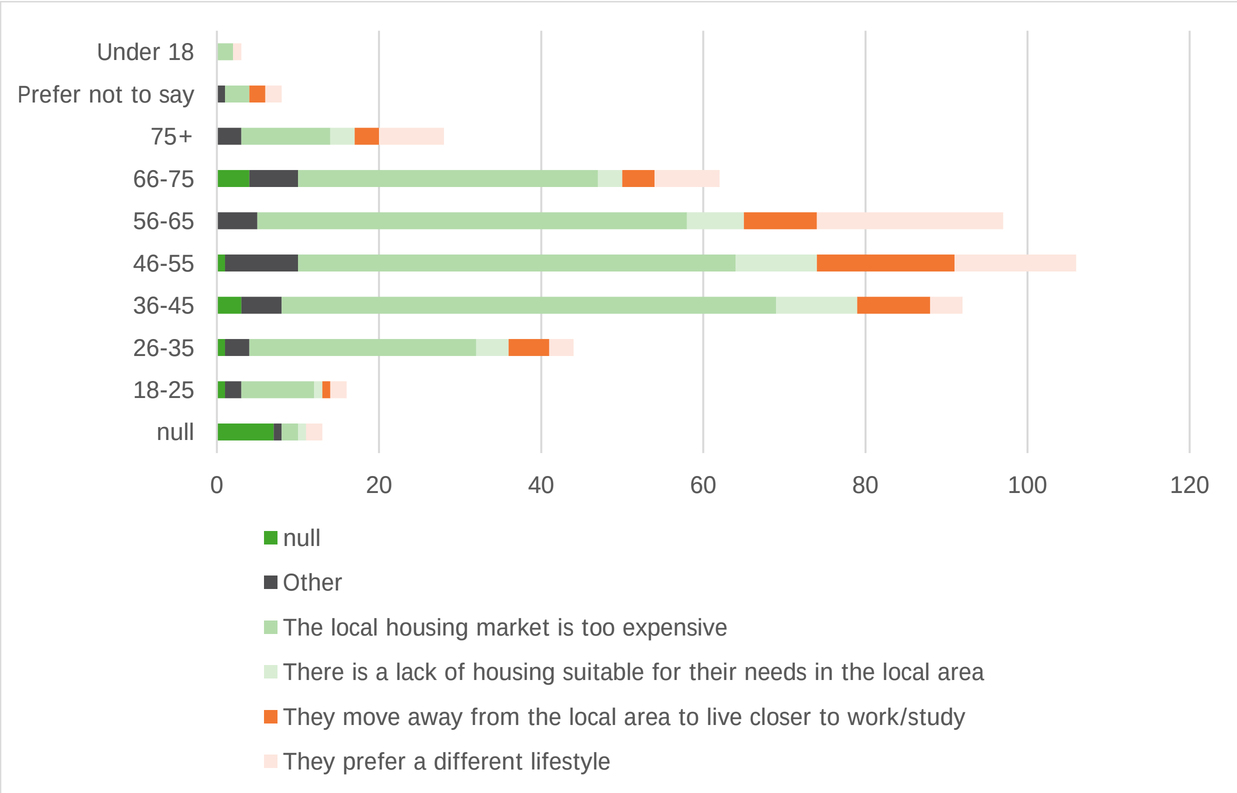
This issue was explored in more detail in focus group and Community Sounding Board discussions.

Q16: In Ku-ring-gai the proportion of younger people aged 25-39 years has been declining. This trend is expected to continue. What do you think is the main reason for this trend? (please select one only)

All participants were able to respond to this question.

Of the 450 responses provided, 259 (58%) suggested that the local housing market is too expensive for younger people in Ku-ring-gai. This perception was consistent across all age groups, as shown in the graph below.

Figure 10 Community survey response to question about lower proportion of young adults



3.1.2 Analysis of comments

A number of questions provided opportunities for free text comments or open to provide views. The graphs below provide an overview of the key themes of the comments provided.

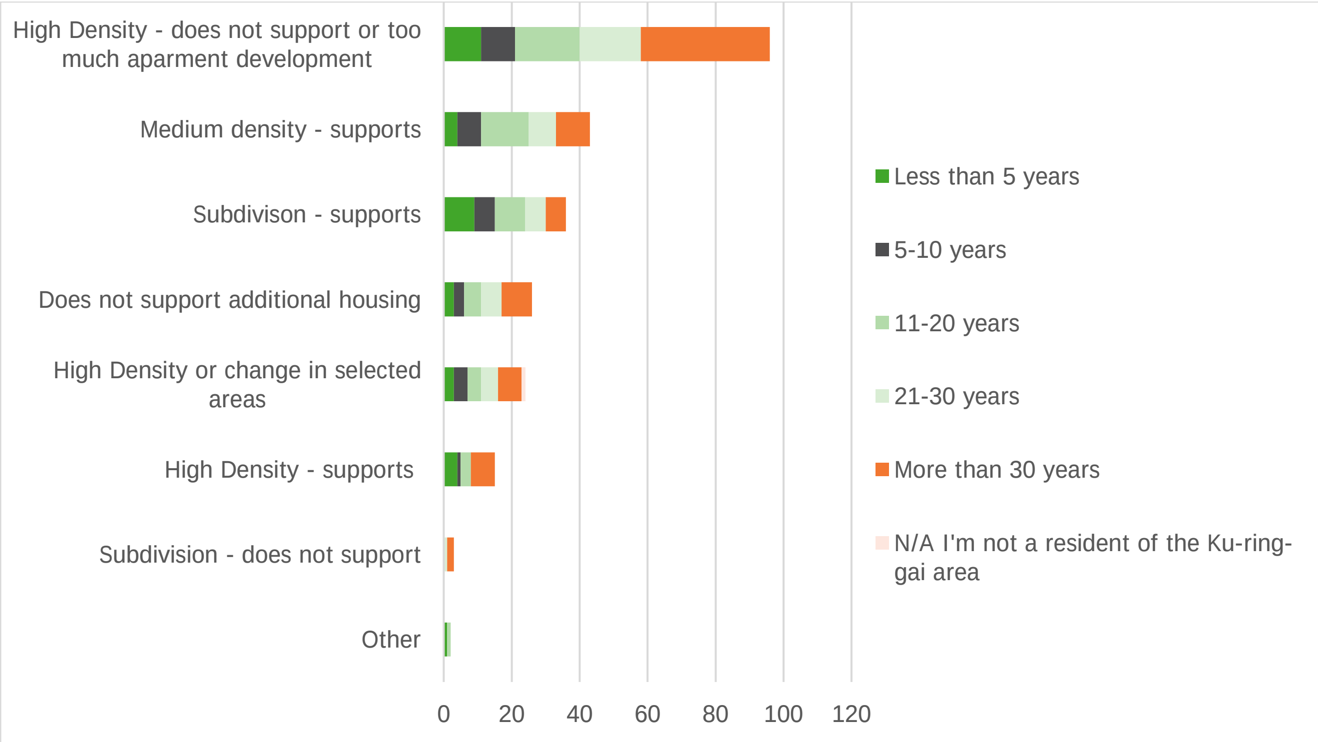
Density

In open-ended questions in the community survey, approximately 25% of respondents particularly mentioned not wanting high density or too many apartments, any additional housing or subdivision. (See Figure 11).

The aversion to high density living was most strongly expressed by older residents that had resided in the LGA for 30 years or more, though other residents who had not lived in the area as long also expressed this view.

The open-ended answers that mentioned medium density, only the specific support for medium density is included in Figure 11. This is because medium density can mean lower-scale apartment living as well as other types of housing such as townhouses. Further analysis of the mentions of specific typologies of housing is explored in a separate analysis.

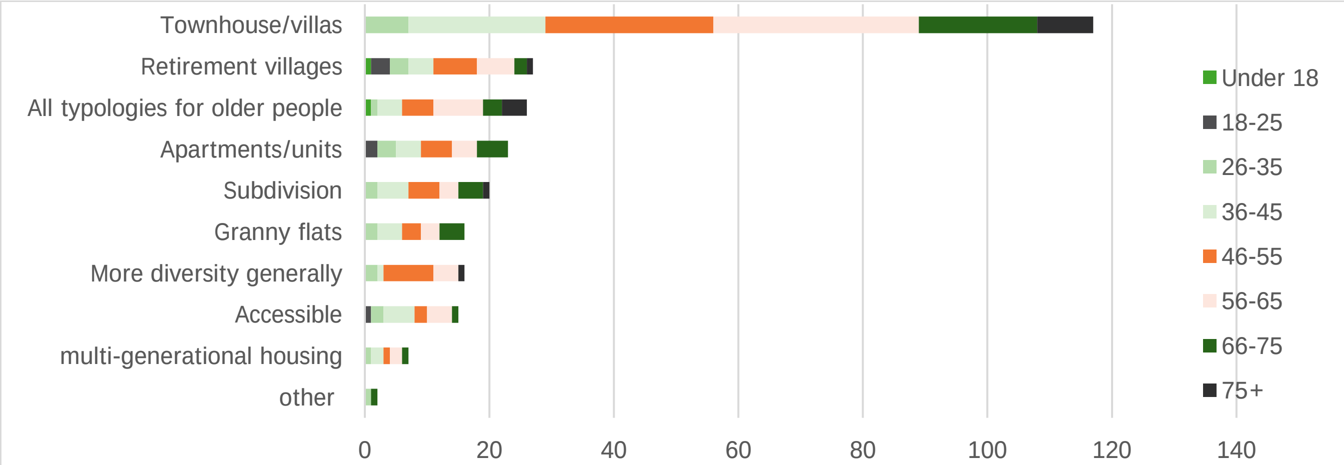
Figure 11 Specific mentions about density, objection to additional housing or support for specific types of density



Housing typologies or features

The graph below shows the number of mentions of different typologies or features of housing, broken into age groups. Favourable mentions of townhouse/terrace/villa typologies received the most comments.

Figure 12 Mentions of desired housing typologies in open-ended questions

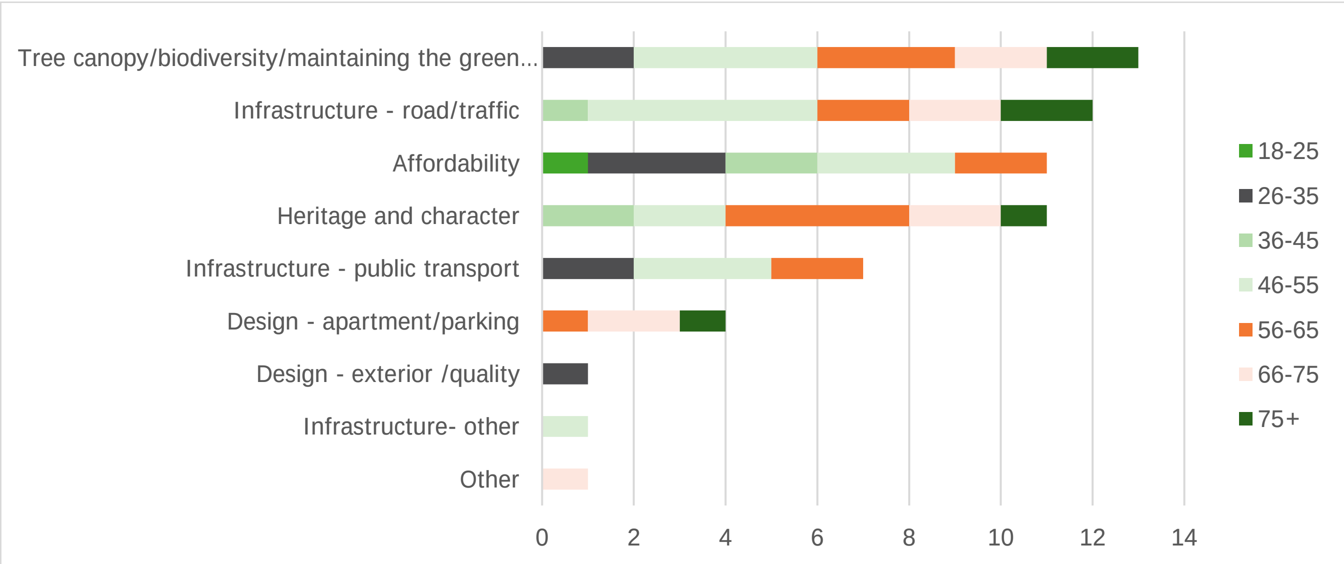


Sentiment towards development/changes to current housing approaches

Reasons as to why additional development or aversion to high density is are shown below (Figure 13). Maintaining Ku-ring-gai's tree canopy, biodiversity and green character was strongly mentioned. This is consistent with what was heard in focus group, workshops and Community Sounding Board discussions, as well previous Council engagements on other matters.

Concerns regarding impact on road and traffic infrastructure was the next highly rated concern. This is consistent with responses to previous survey questions which rated proximity to public transport as a key attribute for future housing needs.

Figure 13 Key reasons in not wanting additional housing or desire for no additional high density housing



Some comments not supporting additional housing include:

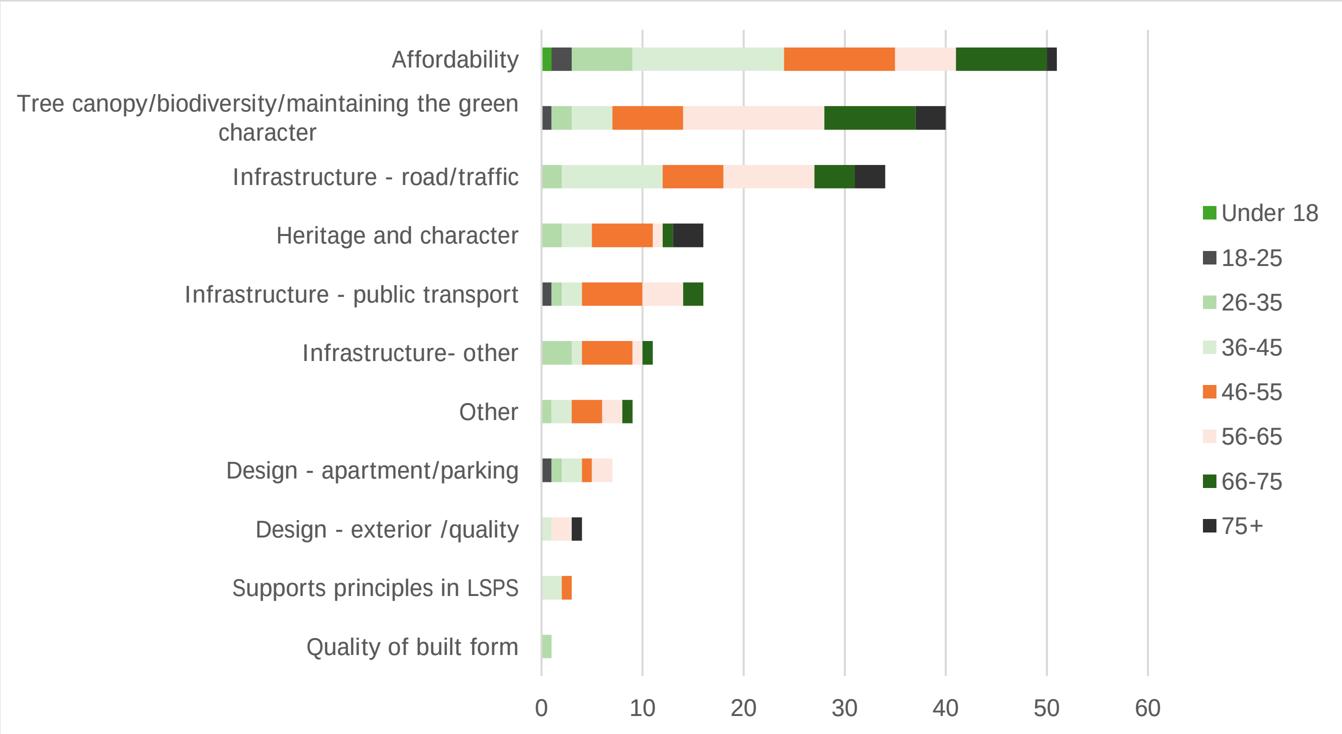
> *Stop high density. Stop overseas money buying up properties and not living in them. It destroys neighbourhoods.*
>
> *High rise apartments ruin the village feel if these centres and will completely change your demographic. People who like the village feel will be forced to other areas.*
>
> *We can meet our targets with zoning as is. Keep the high/medium density to the railway corridor.*

I don't want to see change in these centres. We love Ku-ring-gai because it has not turned into Waterloo. We should not rezone any areas until the current zoning in the town centres are taken up. I do not want to see any more high rise in Ku-ring-gai. It is an eyesore across the area.

Respondents who were in favour of some changes of additional housing cited improving access to more affordable housing options as a key reason. However, these respondents also expressed maintaining Ku-ring-gai's tree canopy, biodiversity and green character. In focus group and Community Sounding Board discussions, participants strongly felt that any new developments or changes to housing approach should not only maintain this unique characteristic, but should seek to enhance it.

It should be noted that community survey respondents who were in support of some change generally provided more discussion about their reasons why. For example, over 50 responses discussed affordability of housing (the top discussion point in those that supported additional housing), whereas only 13 discussed the key reason for not supporting additional housing or certain typologies (the most cited reason for not supporting).

Figure 14 Key reasons for support for some change in housing and issues that need consideration



» Examples of comment in support of some change include:

(other) councils are a great example of making housing affordable at different price ranges and offer various types of housing. They have housing types available for any life stage you are in from apartments to townhouses to detached larger homes. KMC is generally a well serviced area for public transport and it is well located to the business districts such as Sydney CBD and Macquarie Park.

Mid and high density housing will encourage younger families which is great. These younger families will have disposable income and be services heavy (schools, hairdressers, groceries) this growth will require key workers which must be accommodated to continue to encourage community. It's important to plan for growth in the schools and transport infrastructure to not destroy the communities and also plan for a blend of density. Ku-ring-gai doesn't need to be St. Leonards but needs to grow.

More options for medium density e.g. terraces/ townhouses. Don't want to live in a flat but won't need a big 5-bedroom house anymore

Additional housing should be medium density low rise such as affordable terrace housing

Maybe make a mini-suburb of high density and leave the rest for conventional housing

Higher density housing within 1 km of primary local centres

To enable higher density for both seniors and younger people, the radius should be 1,000 metres for higher density.

These centres should not impinge on existing local dwellings. It is ok for them to be located on main roads or rail corridors, but not for example in the middle of existing houses (unless those houses are similarly rezoned as part of the project).

I agree with higher density housing in Primary Local Centres and Secondary Local Centres, but I strongly oppose the development of medium density housing in the Neighbourhood Centres area.

Blocks of units - more affordable dwellings

PLEASE NO MORE HIGH RISE!!! apartment blocks no higher than 4/5 stories

In terms of medium density, while it would be nice to be a 5 min walk from a bus to the city, I think it's pie in the sky. So perhaps medium density housing could replace say a cluster of older housing wherever the topography is suitable - even here in East Killara. It still forces residents into their cars, but until a frequent neighbourhood mini-bus service exists to the station/s (dream on), that's the reality of Sydney

High and medium-density should be kept to the corridor.

Medium density should be more widely available than that, with appropriate design guides.

I'd like to see more apartments being built on quieter streets. Apartment dwellers are treated like second class citizens in that we are essentially forced to live in noisy, polluted areas.

Low rise, in keeping with current suburban tree-filled character of Ku-ring-gai.

I think the Lindfield Hub proposal strikes the right balance that could be replicated. Make sure there is consideration to how steep the walks are.

Consideration of broader range of high density, including retirement villages, villas etc. not just high-rise apartments which affect light tree canopy etc. area is cooler because of trees etc. Need to keep consider how this can be maintained in high density areas.

3.1.3 Forum / open-ended questions – specific comments related to key themes

We want to give residents aged 65+ years the option to remain in the area as long as they would like. What kind of housing would be suitable for those aged 65+ in Ku-ring-gai? Retirement villages? Townhouses? More opportunities to subdivide or sublet existing properties? Granny flats?

A range of suggestions were provided, including:

» housing diversity and opportunities to subdivide

'...consideration needs to be given to as much choice in housing as possible for the elderly, and of course the expense of this has also to be taken into account'.

'Townhouses with a small garden and 2 car garage; more opportunities to subdivide and to let out existing properties; granny flats; smaller houses & townhouses that can be rented out at a reasonable price for elderly people and young people who are trying to save for a deposit-so it is used as a dual purpose for both elderly and young'

» housing affordability

'As I age, I want to stay here, but being a single mother who spends most of her income on mortgage and bills and educating my children, I have no savings and worry about what will happen when I stop working. People say

to me that I should move to a cheaper area, but these are people who have not suffered and have little comprehension on the toll separation/divorce takes on children, and how important it is to maintain some stability for children through their school and local friends whist their home life falls apart'

» proximity to established social networks and services

'I feel it is important that people are able to have the security and continuity of remaining in their 'own' area close to family and friends and familiar service providers'

'For those who have lived in the area a long time it is important to be able to stay in the area even if their housing needs change'

» ensuring housing for older residents is delivered in a way that maintains a sense of community rather than promoting isolation/segregation

'It is often important to older people to maintain contact with people & surroundings they are familiar with and good to have a mix of people of different ages/stages/backgrounds in a suburb rather than it being too homogenous'

» options for older residents to stay in their current accommodation

'Support for them to remain living in their existing accommodation, or possibly granny flats so that their children can live in the house, or they can rent it out, but they don't have to leave the property and someone can keep an eye on them that they're safe'.

In terms of housing, what could be done to encourage people aged 25-39 years to stay in the area for longer if they choose?

The following ideas were put forward:

» Measures to improve housing affordability, included providing diverse housing. Specific housing types that were raised include apartments, townhouses and granny flats.

People in my age bracket WANT to live in this area however with the size of houses available it is too expensive given the commute and lack of local business that younger people want (for example the inner west or Balmain area).

Smaller blocks & townhouses as many families cannot afford to buy in Ku-ring-gai and do not want to live in an apartment.

The council needs to allow more granny flats to be built on the ridiculously large blocks that many houses in the area are taking up.

Rezoning to allow for development of townhouses and apartments on arterial roads would allow for more affordable housing to encourage younger people to the area.

More townhouses with adequate garden/green space - People in this age group cannot afford the houses in Ku-ring-gai and there are not a lot of townhouses available to give these people a more affordable option. I believe there are more and more families moving into the Ku-ring-gai area because of all the apartments that are being built in the area

» In a similar vein, it was suggested that the type of housing currently available in Ku-ring-gai is not suited to this age group, particularly the size of houses.

The schools are brilliant in the area and there are plenty of 'younger' families who would love to live here - the 1,200m^2 home isn't suitable.

» Improvements to surrounding culture as well as services/facilities that are important to this age group, such as schools and convenient transport.

People of this age care more for the school convenience for their kids, transport convenience to work and still enjoy a bit of garden for children and family and relative privacy.

Building more apartments close to centre for age 25-39 years to encourage to stay in the area for longer. I think housing and rentals are too expensive for that age group and they prefer to be closer to work, lifestyle choices like restaurants, bars etc.

The house price is too expensive in this area specially for the family who have 2 or more younger age kids. It would be great to see new townhouses near schools and shops, which still have access to walk to the buses that pass through the area to get to Macquarie

» Enabling subdivisions was again raised, and it was suggested that this would assist younger and older residents alike to stay in the area.

By making life easier for the older generation through subdivision and rezoning to high density in some areas, you are helping all age groups to afford to stay in the area in which they grew up and which they love.

We could consider relaxing certain planning bylaws and creating additional entertainment and lifestyle options - at this stage of life people are generally established in their careers and either don't have children or, if they do, they are not of school going age and value casual eateries, meeting places with some 'vibe',

» Similar to what was raised at the focus groups, there were suggestions that Council does not need to try and retain this group.

I don't think there needs to be a strategy to retain young people in the area.

» Similar to what we heard in the youth focus group, respondents noted that young people may leave the area due to some of the reasons noted above, with the assumption that they will be able to afford to do so.

They will move back when they are a little older and need room for their kids (and as their smaller properties in other areas appreciate to bring them into the Ku-ring-gai price range)

Young people can move to high density living/ more affordable regions until such time as they wish to have a yard and more space to live in and when they can afford it.

I think most young people return to the area once they have a family and want to send their kids to the schools in Kuring-Gai.

What are your greatest hopes for the future of housing in the Ku-ring-gai Local Government Area?

A number of similar themes were raised in response to this question and across all engagement activities:

» Maintaining greenery and trees canopy

That we can maintain the beautiful green and tree canopies of our area whilst ensuring we have appropriate housing for those getting older and younger people.

» Protection from overdevelopment, specifically high-rise development

That the area will not be destroyed by the continuation of over-development and the construction of even more apartments

» Housing that meets the needs of diverse age groups and existing and future needs and allows residents to remain in the area as long as they want

My greatest hope is that the future kind of housing will be more sympathetic to the existing area and be more diverse to attract all age groups

That residents can live their life out in the local area that they love and that the integrity of the area is maintained.

it will provide a variety and choice of housing types to provide for existing and future housing needs of the local community, and Sydney as a whole.

There is so much for you to consider and realise that the aging population need your support, not all of us want to live in apartment blocks.

» Good quality design that respects the local character, is sympathetic to and maintains the integrity of the local area. One suggestion for how to achieve this was to require DA applicants to use an architect with experience in the relevant sector and to the relevant density

The classic housing of older parts of the municipality needs to be treasured and retained as a unique part of the heritage and history of Sydney.

» Housing caters to community needs and desires and not developers

I'm hoping that Council does not cave-in to the developer lobby and allow development in/around the St Ives Village Centre to go to the same way as, say, in Lindfield where the heights of development next to the station are clearly out of character.

» Improve related infrastructure delivery, including car parking provisions

I hate to see the destruction of the old homes and blocks of flats being erected and the roads get more and more clogged.

» An approach that creates more affordable housing

Even as the plan goes, with higher density housing, I will never be able to afford even a one-bedroom apartment in Ku-ring-gai, because there's no push to create affordable housing due to the fact that the majority of the residents are old, rich people who have no intention of sharing with the younger generations.

» There were however differing views on density with some suggesting less high and medium density, others more townhouses rather than units, and others still supporting the growth of medium density. Some suggested restricting high and medium density to certain areas (such as local centres) and maintaining low density areas, even if that means residents need to move out of the area if they want a smaller house.

I would like to see LESS high and medium density housing as you are destroying the beauty and heritage of our area.

More townhouses and not units as we don't the infrastructure to support high density housing.

Restrict the high density and medium density development only in the area of local centre are and don't expand them into other areas.

No more high density apartments and the ability to keep living in this area without being crowded out by over-development.

Seeing that we want to downsize and would like to stay in the area and currently there are few options available, we would love to see more villas or townhouses with lifts built.

I'd love to see the growth of Mid-Density housing in the Ku-ring-gai area.

I will be OK with moving out of Ku-ring-gai when I am ready for more a smaller more manageable place to live in and would like to think that someone who wants a large garden will have the opportunity of taking over my Ku-ring-gai house.

Moving forward, based on directions from the Regional and District Plans, additional housing in Ku-ring-gai should be located within the existing Centres close to transport links and services. This would mean:

» **locating future higher density housing within a 10-minute walk (800 metre radius) of Primary Local Centres at Gordon, Lindfield, Turramurra, St Ives and Secondary Local Centres at Roseville, Killara, Pymble and Wahroonga, near shops, services and transport;**

» **locating future medium density housing within a 5-minute walk (400 metre radius) of Neighbourhood Centres when they are serviced by major bus routes along arterial roads at Roseville Chase, West Gordon and St Ives.**

What factors should be considered when planning these Centres? What other areas in Ku-ring-gai should we consider that may be suitable for change?

Key categories of comments raised are provided in the table below.

Table 2 Sample comments organised by key themes that emerged from the survey

Category	Comments
Support for the centres approach	*The approach is very sound, the challenge will be in execution as it is always is with often a vocal minority that find it hard to accept change. In terms of factors to consider the strategy outlined a very good and comprehensive list of factors to consider, however what it did not do was give those factors a priority so that council can deal with the inevitable challenges of implementing such a strategy in practice. Giving the factors listed in the strategy a priority would be in my experience the single best approach to helping make the housing strategy useful and real to many rather than adding more to the already very long list of factors to consider.* *the above are good ideas* *Stick with those parameters. Ensure compliance by developers and do not allow exemptions.* *Maybe look at a 15 or 20 minute walk of 1 to 2 km. This would solve many problems as well as provide exercise rather that rely on increasing sporting facilities and complexes. Less coffee shops and lol around areas would also be good.* *This is actually a good plan, putting higher density housing around the stations! Yes! I support this! As long as its relatively affordable, it'll bring new people in, young people, otherwise the neighbourhood will stagnate.* *Young adult and childless are best placed near public transport, their main needs are to get to work and entertainment. Families with children will always be dependent on motor vehicles because of the volume of groceries, transport to weekend activities etc. so their housing need not be near facilities.*
Upgrade surrounding services to cope with increased density in the area Consider impacts of this approach on existing infrastructure e.g. certain roads becoming 'rat runs' Amenities and public transport are critical considerations More frequent transport links Infrastructure co-ordination	*Surrounding services will need to [be] upgraded to cope with the increased population density in the area.* *Traffic on highway is already horrible. More high density buildings will increase traffic load.* *Areas around schools. Ensure there are green spaces and sporting facilities such as basketball courts.* *Concentration of services and major retail outlets, with adequate parking facilities, near transport facilities is a worthwhile goal.* *Care needs to be taken not to make these areas too dense without supporting infrastructure - roads, schools, services.* *Talking with State governments re infrastructure, so that schools can plan for growth, and discuss with State govt any other state-funded infrastructure that needs to be planned for. Governments should not be planning projects independent of each other. A co-ordinated approach for growth and funding is needed.* *Walking distance to schools, buses, shops, cafes.* *Allowing high-rise in St Ives is mad anyway as the public transport is not adequate.*

Category	Comments
	User-friendly transport, community areas and green spaces which are maintained properly. User-friendly pedestrian areas
Ensure efficient parking for new residential developments	*If Ku-ring-gai was serious about high density without destroying the place, they would not allow developers to provide car parks in the apartment blocks. This would sort out the traffic issue problem. We have too many people living in apartments AND having cars, which defeats the purpose.*
No more high rises	*We are seeing far too many flats being developed in these areas. There needs to be more townhouse or semidetached houses. Yes, less people can live in the area but the quality of life and attractiveness to live there will be much higher. What the council is creating in places like St Ives is the potential for disconnected communities.*
Design quality of new apartments Management of developers to ensure they don't profit at the expense of quality housing	*They should not look as disgusting as most blocks of apartments do these days. One look at Macquarie Park and around Nth Ryde station should be enough to have people fired. Please - we have to look at these buildings!* *Provide open space and safety in the neighbourhood when designing the spaces.*
Protect greenery and fauna and allowing more green and recreational space	*The green area is being cut off with all development. The area will lose its unique attraction.* *lots of green space, trees & environmentally sound development.* *Maintaining the green and heritage nature of Ku-ring-gai should be a priority. It is why people choose to live here.* *Crucially, Ku-ring-gai's unique and precious green habitat must be protected... Once that is gone, we might as well be like Castle Hill.*
No population increases Concern about development being bought by overseas investors	*We don't need more people in this area, population control as too much development & too many people living here now,* *we are destroying the flora & fauna and natural beauty of this area* *Enough is enough. Stop cramming people into this area. Do not increase the population density. Why do we have to live like Hong Kong?* *Ensuring properties are bought by locals. Not foreign investors.*
Maintain the character and create community feel Sustainability Social opportunities	*Consider how to build communities, not just houses e.g. less private space per lot traded off for more shared areas. Certainly think about urban canopy and how to mitigate urban heat. consider e.g. micro grids so that houses can share power. can also consider shared facilities such as BBQs, laundries, car parking. Plan well for water - can there be better use of grey water? is it possible to have houses of varied shapes and sizes in one community, so that there is space for larger families next to accommodation suitable for older people. also think about the vibrancy of the neighbourhood e.g. St Ives has very few places to socialise e.g. no pub, no wine bar* *BUILD COMMUNITIES THROUGH SMART URBAN PLANNING!* *These higher and medium density housing developments are a great opportunity for the culture of the community to come out and more restaurants and bars start to pop up.*

Category	Comments
	Consideration should be given to the fact that people in the area didn't move here to live in a ghetto. Do we really want our suburbs to end up like Sutherland or Wolli Creek? *The look and feel of the suburb and it should not lead to over crowding* *Ku-ring-gai is unique and has beautiful neighbourhoods and small shopping centres dotted around. This must be preserved.* *Infrastructure and services that facilitate connection and a village feel (such as cafes)* *Maintaining the original character of the neighbourhood.* *Maintaining character of the suburbs we love. Maintaining trees, gardens and homes with historical character.* *Need to become less suburban and incredibly boring.* *Don't allow them to become child-minding centres where granny and toddler by the score, occupy and monopolise public spaces all day*
Allowing subdivision and making the most of existing assets	*Allow strata subdivision of homes generally across the area to allow ageing people to remain at home in homes we love.* *Try and utilise existing space - there are some very ugly old buildings on the highway at the corner of Ryde Road - develop them first rather than eating into land for single detached houses.*

4 Community Sounding Board

Overview

- A Community Sounding Board was established to provide a forum in which Council's project team could test and receive feedback on inputs to the Housing Strategy.
- The group originally comprised of nine community members and six stakeholders and aimed to represent a cross-section of the community. A Council database collating a list of community members expressing an interest in participating in the housing strategy engagement process was used to establish the community cross-section membership. Stakeholders were involved in education, aged care, CALD communities and affordable housing.
- The group met three times between November 2019 and February 2020, with another meeting planned for March 2020.
- Each meeting was structured as a workshop, facilitated by Elton Consulting and notes appear in **Appendix B**.
- Key themes that emerged included:
  - keep building heights as low as possible but recognition that centres need to be revitalised
  - infrastructure needs to support increases in housing. This should consider all modes of transport, not just cars
  - preservation of the area's tree canopy is key. New housing should protect and enhance this
  - Council's housing approach should support subdivision of existing land and dwellings in a controlled manner and support a diversity of housing
  - housing architectural style should integrate appropriately with surrounds and blend with the existing Ku-ring-gai character
  - good quality apartments needed, improve construction insurance issues
  - focus on sustainable living - blend green living and green space, particularly if higher density
  - solutions required to safely manage access to/from the Pacific Highway.

Meeting 1: 11 November 2019

Community Sounding Board members were provided an overview of the role of the group; as well as the need for and inputs to the Housing Strategy, and work undertaken to date.

Attendees then worked as a group to identify, discuss and rank recurring themes from the Community Survey comments. The key themes identified are noted below, (listed from most important to least important).

- **Infrastructure** (including transport): in terms of housing, attendees discussed that there is some tolerance for housing density, provided there is infrastructure to service it. It was discussed that infrastructure can help drive demographic change, not just respond to it – that is, infrastructure provision has the ability to impact who could be attracted to the area. This aspect of infrastructure provision was discussed at the second Board meeting as well as the youth focus group.
- **Desire for different housing types and/or flexible zoning** (for example, small townhouse with a small garden): there is a need for different forms of dwellings, which should be appropriately sized. New housing options should accommodate the changing circumstances of residents – an example that was raised was that residents will not transition from a large family home to a small high-rise apartment easily.
- **Opposition to high density, but support for density in clearly defined areas**: attendees noted the importance of Council coming up with the correct 'density formula'. It was further raised that Council has an opportunity to show leadership through development carried out on its own land holdings.
- **Opposition to congestion.**

- **Desire for preservation of trees/tree canopy**: the group noted that this theme should not be viewed as a stance against development. Construction materials and design quality should complement the tree canopy.
- **Heritage/character concerns**: prevalent in survey comments, generally where people opposed development.
- **Desire for increased social amenity:** (for example, dining opportunities) (**note:** at the second meeting of the Sounding Board, attendees expressed that this should be higher on the list of themes).
- **Desire for existing residents to be able to stay in the same area**: elderly residents fear having to leave the area as a result of the lack of suitable housing.
- **A mix of demographics should be accommodated:** (for example, multigenerational housing and housing for over-55s) through diversity of housing.
- **Desire to be able to walk to rail transport**.
- **Desire for high quality housing:** there is an expectation that housing should be of high quality (**note:** at the second meeting of the Sounding Board, attendees expressed that wording for this should be clarified to refer to certification issues).
- **Desire for variety and choice in housing** (**note:** at the second meeting of the Sounding Board, attendees expressed that this should be higher on the list of themes).
- **Desire for different ownership options:** (e.g. secondary dwellings do not allow subdivision).
- **Desire for appropriately-sized dwellings**.
- **The importance of key worker accommodation/affordability:** participants discussed that the role of Council is ensuring housing affordability for key workers (and affordability more broadly), which is particularly important given the healthcare sector is the major employer within the LGA.

Meeting 2: 2 December 2019

Participants discussed the demographics of survey respondents and community survey findings in more detail.

When shown the age groups of survey respondents, meeting attendees noted that the age group spread of respondents was a reasonable representation of the Ku-ring-gai population. Attendees were similarly not surprised about the attributes people nominated as to what they are looking for in housing when analysed by age groups. In particular, attendees discussed that they would expect younger people to desire housing near public transport, as the survey results demonstrated.

One aspect that was surprising to attendees was the discrepancy between housing nominated as suiting current and future needs and actual current housing types (as discussed in Section 2 of this report analysing survey results).

A number of key themes were raised throughout the session:

Council should support making better use of existing land resources

Council support to enable individuals to subdivide single dwelling houses and blocks of land was undoubtedly the most common theme raised during the meeting:

‘I’d like to be able to do more with what I’ve got’.

‘If Council changes regulations, you can put multiple detached houses on one block of land when houses need to be redeveloped’.

‘If those regulations were changed, a lot of the issues we’re talking about would be flipped. For example, retirees can subdivide’.

Attendees noted and agreed with the large number of survey respondents who expressed that they wanted to stay in their current property and subdivide. They suggested that while people want detached houses to provide separation from immediate neighbours, they don’t need large blocks of land. They also noted that it is very common to see single detached houses being replaced by newer single detached houses, and suggested Council regulations could be implemented to enable construction of more than one dwelling on a lot previously occupied by a single dwelling.

Subdividing land was seen as a solution to increasing housing supply and ensuring appropriate housing for older residents who would have a choice to remain in their homes as they age.

'The government is trying to incentivise people to downgrade but the issue in this area is that there is no stock.'

When discussing how this could feasibly work for the entire LGA, attendees suggested that rather than a widespread approach, subdivision could be applied to specific lot sizes in central districts (for example, 1.5km from transport hubs) and include a number of requirements to make this a workable, safe option. Attendees felt there shouldn't be any restrictions on subdividing existing dwellings unless there is a good reason, such as fire safety.

All attendees agreed that when considering any changes to the current housing approach, Council needs to balance bushfire safety, access, character and creating vibrant centres.

Correlation between the prosperity/nature of local shops and housing type and density

Attendees noted it was interesting survey respondents selected proximity to shops as a contributing factor to meeting housing needs, as they believed small local shops are struggling to survive. Turramurra was raised as a specific example. Attendees discussed that the nature of shops might dictate the style of housing in the local area, and vice versa.

Appropriate density for Ku-ring-gai

It was noted apartments that are delivered well are generally one to three storeys rather than four or more. Any increase in density in Ku-ring-gai should be medium rather than high density as it would result in a *'much better society that supports everyone'*.

Attendees discussed how Ku-ring-gai compares to other North District LGAs in terms of availability of different housing types. It was noted that housing growth in the adjacent Ryde LGA is outpacing delivering of supporting infrastructure, with attendees noting that Ryde does not have a major train line through it as Ku-ring-gai LGA does.

Comments to assist Council in developing guiding principles and a vision for the draft Housing Strategy

Participants were asked to articulate comments to inform housing principles in terms of what would and would not work for Ku-ring-gai. The group was provided with pictures of various housing in the Ku-ring-gai LGA to help them identify elements that they did/did not like.

Principles on which the group agreed included:

» ensuring the right interfaces between housing and the surrounding environment

» integration of housing with the surrounding landscape

» provision of open space with denser living

» sites that provide plenty of canopy opportunities

» multipurpose social spaces (for example, sports facilities with cafes): the Village Green concept should be part of all key centres

» supporting/opportunities for active transport infrastructure (whether pedestrian or cycling).

Meeting 3: 24 February 2020

Participants received a summary of the presentations and discussions at the community workshops held in February 2020 and developed key principles for guiding the housing strategy to report back to Ku-ring-gai Council.

The presentation showed housing scenarios in four urban centres: Lindfield, Gordon, Turramurra and St Ives. It was noted that the data was based on a housing needs analysis and scenarios were developed to stimulate community discussion and have not been endorsed by Council.

The participants had the opportunity to consider the four centre based scenarios. They were then briefed on the community discussion that arose at each of the workshops.

Key themes that arose in the discussion were:

No higher than 10-15 storeys

This theme was consistent for all centre discussion. This was due to the strong commitment to retain the tree based, green space character of the Ku-ring-gai area.

Time lag for various scenarios

Some scenarios focussed on manor-house/townhouses and these would take longer to fulfil housing requirements than a high density development. This led participants to consider the balance of some higher density solutions but without tipping over 15 storeys.

High density needs green space and good design that blends

Participants drew upon international city examples. Singapore with its high-rise but great amounts of green space, Paris and Italy with lower rise but uniform buildings that blend with the character.

All transport considerations

Participants discussed transport within the area. A bike-riding culture that integrates with the traffic was discussed but it was noted that riding on the Pacific Highway is not an option. It was felt that the provision of a variety of transport infrastructure could help e.g. paths, tracks, use of green space, end of trip facilities, shuttle buses, bike and scooter parking. We may draw upon electric scooters not just bikes.

Lindfield

Participants agreed with workshop outcomes which was a mix between Scenario 1 and 2.

Gordon

Participants agreed with workshop that the group did not want a Chatswood. Participants talked about Singapore styles where there was high-rise but with plenty of green space in between and around. Participants agreed that revitalisation for the area was required. The group felt that there was more control over the development under Scenario 1. Participants understood the economic feasibility of 20-storey heights but still leaned towards Scenario 1 to be consistent with lower heights and the character of the Ku-ring-gai area.

Turramurra

Participants discussed that the shopping centre needs improvement. They discussed that there is a need for uniformity and that the area can't just jump from high to low. The group discussed the value of Paris and Italy where the buildings are not too high and it blends and works together. The comment was made that Sydney is the exact opposite of this. Most of the group felt that many developments in the area lose the sense of Ku-ring-gai. Participants agreed with a mix of Scenario 1 and 2.

St Ives

Participants discussed transport noting that St Ives is a distance from the railway station and noted considerations by Transport for NSW of mass transit options like B-Line on the Northern Beaches. Some participants stated the Metro needs to extend towards St Ives. The group discussed the impact of schooling in the area which attracts lots of families and schools that are at capacity.

Participants discussed that the existing highest height is 6 storeys. In order to address issues discussed, the Sounding Board determined that something between scenario 1 and 2 would be required.

Comments to guide housing principles and vision

In this third meeting the Sounding Board began to develop a housing vision and some principles that Council could consider when developing principles and vision for the housing strategy. These are outlined below.

1. **Keep it low as possible and uniformed.** Anything over 15 stories has a different mind-set, encouraged medium-height apartment buildings (4-5 storey)
2. **New housing needs to blend in with the environment with a Ku-ring-gai style**. Use architects, brick theme and set within trees. Draw upon good existing examples such as Alexander, Liberty Growth (across road from school) and Lindfield on Grosvenor Rd. Character of Ku-ring-gai needs to be respected and enhanced.
3. **Address issues with quality of apartment construction**.
4. **Promote sustainability in apartments and ensure green space in between**. An apartment can blend green space and sustainable living e.g. solar power. If 8 apartment blocks are to be built, then there needs to green space in between. A sense of community is important with green space.
5. **A mix of housing should be provided.**
6. **There should be a centres approach**. Focus development on the North Shore line and only consider other locations if improved interconnecting services are provided.
7. **Alternative and active transport needs to be improved or provided** including shuttle buses, safer cycling, separate cycle/scooter tracks e.g. paths through parks to the station, end of trip facilities and bike and scooter parking
8. **Accessibility on/off Pacific Highway to be safe and avoid congestion**. New development should be accessed by the highway.
9. **The traditional owners of the land should be acknowledged in planning**.

5 Focus groups

Overview

- Three focus groups were held between November and December 2019 – two location-focused sessions; and one targeted youth session. A second targeted session, focusing on needs of ageing residents, was converted to stakeholder interviews due to low response numbers.
- Thirty-nine people were engaged across these three sessions.
- Each session was structured as a workshop, facilitated by Elton Consulting.
- Key themes that emerged included:
  - younger residents aspire to remain in the LGA but are concerned about housing affordability
  - Council should enable residents to make the most of existing land lots and houses
  - any increases in density must be delivered in a way that protects Ku-ring-gai's much-loved character – both in terms of the natural environment and existing housing types
  - if density is to increase, medium density is more suited to Ku-ring-gai than high density
  - increases in housing numbers must be supported by infrastructure improvements.

At the start of each focus group, Elton Consulting and Council provided an overview of the need for and inputs to the Housing Strategy, and work undertaken to date.

Focus group 1 – Youth: 2 December 2019

The focus group was held at Gordon Library from 4pm to 5.30pm. Invitees included stakeholders who work with young people in the LGA, survey respondents aged 35 and under, and younger residents known to Council. Five people attended the session.

Key themes that emerged from the youth focus group included:

Younger residents aspire to remain in the LGA

Attendees were not surprised by survey results which showed the popularity of detached houses for current and future needs. They saw Ku-ring-gai as a place they wanted to ultimately live in specifically because of the typical housing character of the LGA being large, detached houses:

'...[detached houses are] *the advantage of this area'*

'...for younger people, as you get older and want to raise family, you want a bigger house'

'...there are higher density areas outside of Ku-ring-gai that are suitable for a student 18 to 25; but as soon as [that age group] *started a family, people would be looking for a house with a garden'*

Participants acknowledged that while there is high demand for detached housing, there's not enough space in the LGA for everyone to have this.

Other attractive features of the LGA that were nominated were proximity to good schools, the community feel and unique natural environment and character. One attendee noted that peers who are moving away are relocating to Inner West Sydney or the Northern Beaches as those areas are more appealing culture-wise (with theatres, restaurants and bars).

It was suggested that while a lot of people are moving into the area, Council is not providing incentives for people to stay.

A desire to stay in the LGA continued to be expressed in discussions about housing supply to enable residents to downsize in the area. Participants noted that if people are able to downsize in the area, then *'that frees up houses for younger people coming back'*. This was supported by another attendee who suggested that if there are not suitable houses in Ku-ring-gai for residents who do wish to downsize within the area, they will stay in their detached homes: *'We can make that easier for them by providing spaces in Ku-ring-gai for them to move to'*.

Housing affordability is a key concern

While participants want to remain in the LGA, they expressed a fear that they may be priced out of doing so:

Affordability is the key issue. I'd like to raise my family here.

[There is] *such a great fear that we won't be able to buy ourselves into this area*

I definitely am concerned about my future ability to stay in Ku-ring-gai

[People my age will] *move out* [of Ku-ring-gai] *because house prices are just too high. They simply can't afford it.*

Hands down a detached house would be preferable, but not affordable in Ku-ring-gai.

…it's much tougher for our generation to live in this area [than our grandparents' generation]*.*

One attendee noted they didn't think they will be able to afford to live in the area unless they live with their parents. This issue is compounded by more people moving into the LGA, with increased demand pushing up prices of detached dwellings as well as higher density living.

The concern around affordability extended to being able to stay in the area when family circumstances change. Attendees provided examples of peers' families needing to downsize or move out of the area due to changes to income and increasing house prices.

Make the most of existing assets

Similar to Community Sounding Board discussions, focus group attendees felt that if Council enabled modification to existing uses of houses/land lots, a greater number of residents could be accommodated and the LGA can conserve what it already has:

'If it were permissible for someone to share their house, then we can make use of those lovely houses'.

One attendee suggested that since it is not likely that everyone who aspires to have a detached house will be able to live in one, being able to deliver two properties on one lot (for example, townhouses with a shared yard) could be a viable solution to meet housing demand and community desires.

Density and character

Echoing what has been expressed strongly through all other engagement activities, participants expressed that all age groups are *'protective of character of the area'* – both in terms of the natural environment and houses that are typical of the area. Because of this, residents would not support removal of existing houses for new ones, even if doing so would provide opportunities for residents to choose to downsize.

When discussing whether density could be provided in a way that maintained the LGA's character, one attendee suggested that Council should include codes requiring green space and certain set back distances from the road. Echoing what we heard in other engagement activities, participants felt that while medium density could potentially be delivered in a way that maintained the area's character – if green spaces and quality design were maintained –high density would negatively affect Ku-ring-gai's character.

One attendee noted that changes to housing types are already occurring around train stations where new apartments are being built; and this makes sense as apartments may not have parking for cars. It was also noted that transitions between housing types need to be carefully planned to maintain a sense of community and avoid housing creating divisions.

Similar to comments received across all other engagement activities, attendees noted that an increase in density will require and increase supporting infrastructure.

Focus group 2 – south-eastern focus (Roseville, Lindfield, Killara, Gordon and surrounds): 9 December 2019

The focus group was held at the Lindfield Seniors Centre/Community Hall from 6pm to 8pm. Invitees included local resident action groups and those who completed the community survey and nominated that they would like to be included in future consultation activities.

Although discussion focused on the south-eastern portion of the LGA, residents from across Ku-ring-gai were able to attend. Thirteen people attended the session.

Key themes that emerged from the focus group included:

Diverse housing supply

Participants discussed the need for diverse housing stock to be available without ruining the local amenity of the area. A number of specific issues were discussed:

- » There needs to be a step/more gradual change in density between house and apartments (for example, townhouses), as this approach will suit peoples differing needs.
- » The need for accessible housing was also raised, and noted as being able to meet the needs of older residents as well as parents with prams. One participant noted that if affordable housing was distributed across the LGA, the *State Environmental Planning Policy (Housing for Seniors or People with a Disability) 2004* may not be needed.
- » Participants noted that, rather than leaving the area, some residents want a smaller home with a garden that is more manageable. One individual volunteered that this experience is relevant to him, noting that although he has been seeking to downsize, there is no stock of suitably-sized properties.
- » Distribution of affordable housing to accommodate the LGA's key worker populations, such as teachers, will help ensure the economic and social stability of the area. This issue was also raised in telephone interviews with aged care sector stakeholders.

There were conflicting views about whether all age groups should be catered for, particularly younger residents. In contrast to the views above, one participant noted that housing in Ku-ring-gai does not need to cater for the full range of demographics as it is good for people to move around. Similarly, one participant expressed that:

'We shouldn't have to change our area in order to cram everybody in. Why does all of Sydney have to be homogenous? If young people want terraces on smaller lots, and bars and restaurants they can move to Balmain. Ku-ring-gai should fight to maintain its own uniqueness.'

While it was noted that the area was too expensive and unsuitable for younger residents, one participant noted that these residents may move away from the area, but then return when they have a family, echoing what was heard in the youth focus group. This suggests that participants did not feel a need for housing supply to specifically cater to younger residents.

Infrastructure

Participants discussed the pressures of increasing the population on surrounding infrastructure (such as roads and schools) and, reiterating what we heard through the survey, other focus groups and the Community Sound Board, noted that there should be no new dwellings until infrastructure is improved. Although rail infrastructure improvements were not specifically discussed, the group did note that the train line is the LGA's biggest asset (in terms of supporting infrastructure).

Density and local character

The need to protect Ku-ring-gai's unique character was once again raised during this focus group:

'Ku-ring-gai is a unique area; the tree canopy and garden settings are what attract people to the area. It is important that this uniqueness is preserved, this should not be thrown away just to hit targets'.

Participants noted that each LGA has a different lifestyle and the unique Ku-ring-gai lifestyle needs to be protected when delivering more housing:

'Why are we comparing Ku-ring-gai to other LGAs? Even within the North District it is useless to compare areas, dwelling typologies in Ku-ring-gai reflect our unique local character'.

'Ku-ring-gai's role is to be a place for families'.

One participant suggested creating smaller villages as a way of increasing density while still retaining local character. This could involve having three or four smaller dwellings on a large lot with a communal open space.

Participants stated that any increases in density should be contained to certain boundaries (such as near train stations or along the Pacific Highway), to preserve the character of the majority of the area – a similar sentiment to what was expressed across other engagement activities. It was further discussed that there needs to be innovation in apartment design to avoid them looking the same as those in other areas.

As we heard in other engagement activities, participants noted that medium density makes more sense for Ku-ring-gai over high density, and will better assist in managing potential overcrowding. Interestingly, one participant suggested that higher density could be healthier for people, as residents in these dwelling types would be encouraged to walk more, over using a car.

One participant noted that Ku-ring-gai's Heritage Conservation Areas (HCAs) clashes with being able to provide new housing stock, as well as community preferences for restricting medium and higher density to certain areas. There is was concern that gradations currently do not work and, as a result, interfaces between existing and any new housing stock is poorly designed and handled.

Council should support making better use of existing land resources

As per discussions in the Community Sounding Board and youth focus group, participants wanted residents to have the opportunity to subdivide existing land and houses:

'The most important thing for Council to consider is subdivision over high density'.

It was felt that such an approach would:

» allow areas to grow organically, rather than being directed by a strategy

» present a better alternative to increasing density than high rises

» enable flexible housing structures

» provide a halfway point between R2 and R3 zones that would be suitable for the suburbs.

Similar to the discussion on this topic in the Community Sounding Board, participants suggested that reducing current minimum lot sizes in addition to the above would allow for more dual occupancy dwelling and multi-generational housing, helping to increase housing supply without impacting local character:

'I am shocked at the amount of under-occupancy shown in the table, and the lack of housing suitability in the area. Subdivision would be a great solution to this, the current minimum lot size is crazy. Why is it so large in Ku-ring-gai?'

In contrast, one participant suggested that the current large minimum lot sizes are justified in order to preserve the area's tree canopy.

Focus group 3 – north-western focus (Turramurra, Wahroonga, St Ives, Pymble, Warrawee and surrounds): 10 December 2019

The focus group was held at Gordon Library from 6pm to 8pm. Invitees included local resident action groups and those who completed the community survey and nominated that they would like to be included in future consultation activities.

Although discussion focused on the north-western portion of the LGA, residents from across Ku-ring-gai were able to attend. Twenty-one people attended the session. One attendee provided Elton Consulting with notes he brought to the meeting and notes he captured from the meeting.

Key themes that emerged from the focus group included:

Density and local character

The need to protect the local character – and discussion about what that entailed – once again came through strongly during this focus group. Participants discussed that Ku-ring-gai had a 'high quality fabric', non-congested roads, quality schools, heritage, neighbourhood character, tree canopy and beauty:

'Ku-ring-gai is a beautiful area, it's an aspirational area. We have to keep that.'

One participant noted that amenity should be defined for each area as it is context-dependent.

Participants discussed that a detached house is the predominant dwelling type in the area as residents continue to want to live in this type of dwelling, and that this is what the survey results show.

We once again heard that, if an increase in Ku-ring-gai is delivered, medium density (townhouses/villas) is much more favoured over high density (apartments).

Similar to what we heard in the previous focus group and the Community Sounding Board, one participant noted that the type of community's residents want are little villages, providing St Ives (which has a common park) as an example.

As was raised in previous engagement activities, it was stated that increases in housing supply should be contained to certain areas, and that developers look to sites zoned for increased housing in town centres before looking at sites in suburban areas. It was further suggested that certain areas be designated for different typologies of development (for example, apartments in one area and houses in another).

One participant stated that if the community does not favour high rise, then increased housing supply will need to encroach on bushland areas. However, as has been strongly emphasised many times through all engagement activities, Ku-ring-gai's natural setting is a key and much valued feature of the area. As such, the participant stated that the decision to encroach on bushland areas for housing can only be made when population growth is known.

Although participants in other engagement activities offered the area around stations as an appropriate place for increase in density, one participant at this session suggested that high-rises present the worst outcome for these areas; and questioned how delivering more housing can minimise the damage to, and protect, heritage areas around stations.

Design quality was once again raised, with one participant suggested that while more dwellings in the area is a 'given' the community can insist on the quality of structures built. Participants discussed that Council needs to have a vision for the local area prior to new housing being delivered to ensure that the area does not end up with different types of dwellings (in terms of design).

Participants also stated that they felt that new buildings are being marketed to communities of specific cultural backgrounds and overseas investors who may not have much attachment to the local character of the area. They also stated that immigrants aspiring to live in Ku-ring-gai have 'different' social behaviour.

Affordability

The group had different sentiments to the subject of housing affordability.

One participant noted that there are lower income earners who work in Ku-ring-gai, and there are students who might like to consider living in a share house in the LGA, for whom affordability might be an issue. Others suggested that young people have a great interest to live in Ku-ring-gai (as we heard in other focus groups), but that affordability is a key barrier. It was suggested that the primary reason residents rent apartments in the area is because they can't buy a house.

One participant suggested that the area needs more townhouses to increase housing affordability, noting that the area has enough units.

Some participants felt they might not be able to afford to buy the house that current live in in today's housing market, and are in favour of a change to housing cost.

In contrast, other participants noted that housing affordability is a Sydney-wide issue, and that Ku-ring-gai is a high cost and high-quality area; and as such, increasing housing stock is not going to solve this. One participant suggested that as there are no issues selling houses in Ku-ring-gai, people can obviously afford them.

While much of the discussion on affordability focused on current residents or those wishing to return to the area, one participant noted that there is a growing number of people sleeping rough, and there will be an increase in homelessness. In response, one participant suggested that there are 'only three' people sleeping out at Ku-ring-gai, who are not Ku-ring-gai residents, but have come from other areas because it is a safer area. They noted that NSW Government boarding houses bring undesirable people into the area.

Affordability and proximity to infrastructure were noted as key for residents aged 36-55 in particular.

Diverse housing supply

There was some disagreement about diversity of housing supply.

Participants discussed a desire to be able to downsize within the area, to smaller, more manageable housing – this would be a smaller house with garden (on a smaller lot of land), or terraces or semi-detached houses with communal gardens, rather than apartments. One participant suggested these types of housing may also be more attractive to younger residents who have left the area and wish to return; and may be more affordable.

When shown the numbers of various housing types in the LGA, participants were surprised there were not more townhouses and villas and suggested there should be more. Other participants disagreed, saying the LGA is a family area and houses should reflect this.

In another contrasting viewpoint, one participant noted that they would prefer a three-bedroom apartment (of which they noted there is a shortage in the area) with patio rather than a townhouse with steps, or a two-bedroom apartment. Another noted that developers say that townhouses are not viable.

Participants noted that the costs associated with downsizing (specifically, stamp duty and other taxes) are a barrier to pursuing this option.

There was much discussion about the demographics that should be catered for/will be attracted by diversity of housing supply:

'Older people are very important to our community, they provide stability and duration'.

'Why do we want to attract 20 year olds? Ku-ring-gai wants housing for families'.

'If we don't have young people in the area, our whole social structure will change'.

'People come to choose a garden suburb with good schools and preschools. Young 20 year olds want diversity so they move to Balmain'.

'Young people move to inner city and then move back to have children. People choose to move out, they will come back later'.

'The low levels of people wanting assisted living is very surprising to me, I think this is very naïve of respondents. If they want to stay in the area, this is what they will need'.

One participant suggested that while it will be inevitable to have different types of housing in the area, diversity of supply should not be used to attract people to the LGA. Another stated that there is diversity elsewhere in greater Sydney and so it is not needed in Ku-ring-gai: *'it is like asking Newtown to provide the quarter acre block'*.

Housing supply diversity was offered as a solution to address affordability concerns. In contrast to other discussions, one participant suggested that apartments would address this issue.

There was some discussion about the role subdivision could play in increasing housing supply, including to enable downsizing. Participants noted they would rather development through subdivision rather than high rises as this would allow the area's character and greenery to be maintained. One person suggested Council once again enable dual occupancy as it previously did, as this would allow residents to have gardens and maintain the valued housing aesthetics typical of the area. Limitations to this approach that were raised included bushfire risks and ensuring parcels of land are big enough.

Participants noted that they felt a number of existing houses and apartments were empty, with one person suggesting that the number of empty houses is 6%. The issue of land banking in the LGA was raised, with participants noting that it results in empty lots and developers building 'luxury' dwellings.

Infrastructure

Echoing what has been repeatedly heard in other engagement activities, participants raised a number of concerns that existing infrastructure is not meeting the needs of the current Ku-ring-gai population, and would not cope with increased density. The Housing Strategy must consider the required supporting infrastructure/infrastructure improvements needed to accompany additional housing

'There can't be housing targets from Department without the consideration of this impact on infrastructure'.

Specific issues that were raised included:

- congestion and parking
- how public transport can be better utilised
- stormwater infrastructure
- impacts of peak commute periods on those who travel/park off-peak.

Participants noted that residents want to live close to key centres because it is too hard to park there (St Ives Village was offered as example). Suggestions to help address some of these issues included not allowing parking at centres, better footpaths to encourage walking, and better parking in residential dwellings as well as centres.

Development of the Housing Strategy

Participants raised a number of concerns with development of the Housing Strategy and associated planning processes:

- Concerns that Council decisions are being overridden, for example by the State Government, Sydney North Planning Panel and Land and Environment Court.
- Concerns about which authority is driving growth numbers and wariness of State Government numbers.
- Development of the strategy should include:
    - analysis of the cumulative impact of the past 15 years of growth
    - impact of overseas investment on housing
    - involvement from local Members of Parliament
    - accompanying studies on water, sewerage and infrastructure
    - an understanding of people who work in Ku-ring-gai (building on the point raised previously that affordable housing may be appropriate for lower income workers in the area).

There was also concern that Council is not addressing areas that require more urgent focus than housing: new facilities, new parks, footpaths, overcrowded schools, run off, impacts of an increasing population and development of an urban forest strategy.

One participant suggested that a housing vision and aspiration needs to be developed as a base from which the strategy, and future housing, can be developed.

Participants expressed frustration that growth targets are updated within short timeframes (such as every five or ten years) while delivery of additional housing has commenced – meaning that growth that has already been delivered is not considered in revised targets. A staged delivery of growth was suggested to overcome this issue.

6 Workshops

Overview

» Elton conducted six workshops with the community in February 2020.

» The community was invited to attend through direct contact with community members that registered interest in earlier engagement activities, community group contacts, advertising on Facebook, and direct recruiting to target difficult to access members of the community.

» 165 community members RSVP'd to attend the workshops,111 attended.

» The workshop commenced with a presentation of what the community had told us during engagement to date, an outline of the demographic evidence and housing in the LGA, preliminary outcomes of the housing needs study, housing typologies, capacity and potential. Scenarios were then presented to stimulate discussion.

» Key themes that emerged included:
  > Ku-ring-gai's green character and heritage to be protected in any housing scenarios
  > Some participants opposed high density/apartments in any location while others expressed it was appropriate in some locations (generally close to the railway station)
  > Townhouses were widely desired
  > Property owners should be allowed to subdivide land and/or existing homes
  > Diversity of housing to support old, young, families and key workers
  > Mixed views about housing to support young adults
  > Infrastructure and transport planning to be undertaken in parallel to housing planning

Each workshop commenced with a presentation covering the following:

» Why a Housing Strategy was required and the timeline for community engagement on the development of the Ku-ring-gai LGA Housing Strategy

» what Elton Consulting, as independent facilitators of the engagement process, has heard from the community so far via survey and focus groups

» demographic evidence outlining the forecasted population changes in the Ku-ring-gai LGA and a brief outline of the mix of homes in the LGA

» preliminary outcomes of the Housing Needs Study

» housing typologies, capacity and potential

» scenarios for discussion with a geographical focus relevant to the workshop or all key focus centres (Lindfield, Gordon, Turramurra and St Ives), including the resident action group and youth workshops.

To facilitate discussion with the community in workshops, three indicative housing scenarios were developed for the centres of Lindfield, Gordon, Turramurra and St Ives. These were not Council-endorsed but simply to facilitate discussion about various housing options. In each case:

» **Scenario 1** provided a broader spread of potential change with areas around the cores of centres to provide manor houses (conversion of existing dwellings to provide housing for more than one household, attached dwellings and in some cases land subdivision). Centre cores would have more limited uplift but sufficient to promote revitalisation

» **Scenario 2** provides some further density in the cores and more limited areas of housing diversity surrounding the cores

» **Scenario 3** generally focuses change in the core of centres, with more limited housing surrounding the centre.

Following the presentation, the attendees split into two groups to discuss views and thoughts on the scenarios, and in particular the principles relating to the scenarios, offered to stimulate discussion. It was made very clear to participants that scenarios were not Council-endorsed and had only been prepared to facilitate discussion in the workshops. Notes were taken during the workshop to record the feedback and these are summarised below into key themes and key common comments. In some instances, there were community members who were unable to attend the workshops but provided input over the phone or via email. These comments have been incorporated into the summary below.

Community Workshop 1: 12 February 2020 – Lindfield-focussed

SUMMARY

In the community workshop focussed on Lindfield, there was mixed views where some participants expressed a desire for a combination of Scenario 1 (attached/manor house over a broader area with lower scale in the core) and others preferred Scenario 2 (more of a townhouse focus).

The focus should be on townhouses, as well as repurposing existing dwellings, to address multi-generational housing needs and make better use of current housing stock while maintaining character.

All expressed a need to improve east-west connections and concern about infrastructure within the core of the centres. Many expressed that the Lindfield hub would improve infrastructure.

A FOKE representative was of a different view in that the focus should be on the council stopping developers ‘cherry picking’ sites within the Lindfield core.

Discussion on any higher density development was driven by the desire to reduce impacts on the suburbs in terms of footprint. The participants indicated a need to avoid penetrating the depths of the suburbs with change but too many apartments at the centre is not right either. Any higher density should not reach levels higher than the Hub (8 storeys).

KEY COMMENTS ILLUSTRATING THEMES DISCUSSED BY WORKSHOP PARTICIPANTS

Below are the key themes raised by workshop participants and key common comments.

Housing Typology/diversity

- Importance of being able to stay in the area with established support networks, a mix of lower rise townhouses and high-rise apartments is the solution
- *‘There is a clear need for townhouses’*
- Higher density close to transport is desirable, but without the proper assisting infrastructure it clogs up the roads
- The need for a mix of housing needs to be addressed
- Current townhouse stock is expensive to downsize into resulting in there would be no money left over to live affordably
- Idea of a manor house could work, presumably a lower development cost and ensures development is within the existing building footprint and character. Catering for multi-generational households is really important, with the ageing population and rising house prices families are housing their kids for longer, and would like to keep their parents in the house too – attached dwellings and manor houses can be a great way to accommodate this growing trend.
- Development needs to be stepped down from high rise to low density
- Provide high rise closer to the station then retain the current height in the rest of the areas
- There is already high rise in the area so Scenario 1 will achieve the best mix
- Townhouses should be located closer to centres/facilities

- Need younger people in the community to create vibrancy and therefore, townhouses (which are more affordable and do not have large gardens) and housing diversity are critical.
- Concern that higher density in the centre will lead to increased rubbish and crime in the area

Retain the Character of the area

- People live in the area for the large lot character, *'if people are allowed to subdivide or develop it will change this character'*
- One or two participants said the scenarios will ruin the character of the area and reduce home values of existing rate payers. Some did not agree with the premise that Ku-ring-gai needs to add additional dwellings. Some had key concerns about the dilution of property values if you change the nature of neighbouring housing.
- Comments were made that *'If we stop building houses then people won't be able to come to the area. What comes first? The house or the people – obviously the house'.*
- Interface with heritage buildings is important - there cannot be high density next separate houses that are in a heritage area.
- It is important to create vibrant and connected communities that mix young and old and families.

Infrastructure/access improvements should be aligned with any change to housing

- Growth is fine as long as there is corresponding infrastructure
- Need to consider that the Pacific Highway separates a suburb; this decreases pedestrian permeability
- Need better east-west connectivity across the Pacific highway and over the rail line
- Traffic generated along the Pacific Highway needs to considered when planning housing
- The completion of North Connex may reduce traffic pressure on Pacific Highway
- Encourage additional buses / transportation / local commuter buses into the core centre form the surrounding residential area to assist in reducing traffic
- *'Apartments and townhouses need to be near the train line'*, the further away they are the more traffic problems there will be
- There should be adequate amount of parking spaces in apartments, in particular apartments are allocated one space but the occupants have two cars. If the apartments are in the centres, then the second is parked on the street causing congestion.
- Support for housing within walking distance of the train station

There should be a significant improvement in design of housing and provision of open space

- *'There are good townhouses and bad townhouses, it all comes down to design quality'*
- *'It is important to have a mix of the old and the new, with sympathetic design that is not built for the masses'*
- These scenarios don't consider open space - this is an important consideration for the wellbeing of communities
- There needs to be a visual curtilage between high-rise and heritage homes
- The council should plan for a community garden space to replace the backyard concept, in order to afford opportunities for inter-generational sharing around life skills growing food etc.

Principle of broader housing diversity around the centres rather than increase height in centres

- In relation to Scenario 1, comments were made that with the broader footprint including opportunities for townhouses, there will need to be open spaces and little corner stores. The increase in density could bring back the idea of the neighbourhood corner store.

» Comments provided more supported the principle of having "more coverage" and lower density and thus acknowledging that there is a trade off in concentration in the centres

» Other comments indicated that the broadening of housing diversity is too intrusive into the suburbs

» There's already a lot of high rise in the area and therefore Scenario 1 will achieve a better mix, however there cannot be any buildings over eight storeys.

» A middle scenario with more townhouses as the participant would like to avoid the visual impact of high rise along the Pacific Highway

<u>Timing/staging of housing changes need to be carefully considered</u>

» Timing and staging of the implementation of housing diversity is critical as the area cannot "go from black to white,". There needs to be a transition. Comments included that Scenario 1 with a mixture of Scenario 2 would achieve this outcome.

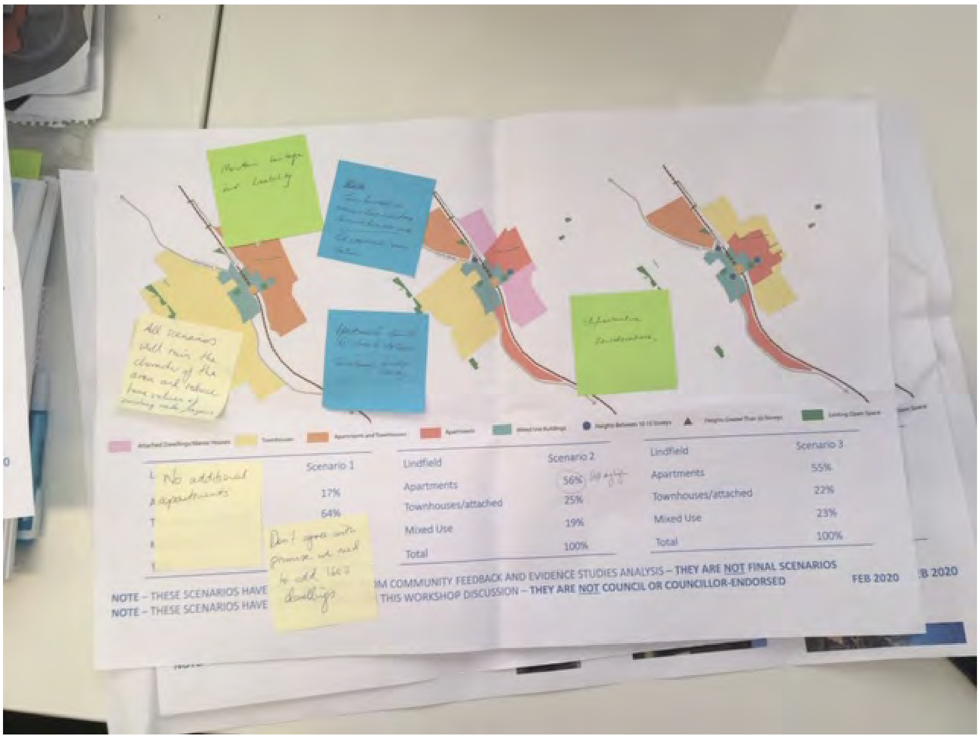
» Some scenarios can be implemented quicker than others, and therefore the assessment of the potential take up rates over time must be considered

» *'Timing is really important – and phasing is important'*

<u>The approach to the development of potential scenarios</u>

» Comments suggested that the mapping of riparian corridors should be reviewed – mention of Drovers Way

» The assessment and mapping to inform the scenarios in some areas, such as in Lindfield, should be reconsidered, as many areas/sites have already been developed where it says it has potential.



Workshop 1 example of participant input

Community workshop 2: 13 February 2020 – Gordon-focussed

SUMMARY

» There was more preference for Scenario 1 or 2 in group discussions as this reflected a desire for townhouses, and not wanting too many high-rise buildings in the centre. Participants did not want Gordon to be like Chatswood.

- There was a preference for a diversity of dwelling types to be delivered, but some mentioned a preference for apartment buildings to be 10 storeys or less – not 20 storeys.
- There was a common view that too much high-rise can change the character and feel of the area.
- Others in the workshop preferred townhouses and villas rather than apartments and reduced lot sizes.
- Many participants felt that preservation of the tree canopy and ensuring more parks and open space were essential and these aspects could be integrated with new development. A lack of open space was generally noted by all participants and this should be a key goal in any redevelopment.
- Some participants acknowledged that there may need to be trade-offs, especially in the mixed use and retail space as developers won't develop unless it's commercially viable. If some apartments are allowed then residents can get town centre spaces, community spaces and public open space
- Many agreed that improvements to Gordon centre, road and rail infrastructure are required.
- It was recognised by one participant that there was an opportunity to for the Pacific Highway to go underground to improve amenity in places like Gordon.

KEY COMMENTS ILLUSTRATING THEMES DISCUSSED BY WORKSHOP PARTICIPANTS

Below are the key themes raised by workshop participants and key common comments.

<u>Need to retain Green space/tree canopy</u>

- Preservation of tree canopy was important in the housing strategy
- Reduce minimum lot size with strict controls to preserve trees
- Need to provide parks and open space, and integrate these with new development
- Any tree replacement should be done with appropriate species

<u>Need to ensure a vibrant community</u>

- There is a need for mix of all people, of all ages for vibrant communities. Housing should support Younger people in the area
- Responsibility for sharing growing population across Sydney
- There should be more apartments for younger people
- There are signs of psychological problems of people living in high-rise, as you start to lose contact with the ground.
- Housing strategy should encourage home ownership as it creates independence and investment.
- Downsizers still want to live in single dwellings

<u>Design to maintain character</u>

- Reward good design and good architecture
- A lot of issues can be overcome with good architecture
- High quality, architectural designed dwellings will ensure increase density that does not destroy Ku-ring-gai
- Too much high rise will ruin the character of the area and destroy what makes Ku-ring-gai unique
- People want to live in Ku-ring-gai because of the way it is and the connotations of that. If people want houses like the ones in the Eastern suburbs or in the CBD – then they should live there
- The character of Gordon cannot and should not replicate the character of Chatswood
- 20 storeys is too high and will change the character of the area
- Housing could feasibly assist in revitalising the centre, especially the existing ribbon retail shops and thus rebuild character of the centre.

- Large sized lots are part of the appeal of the area so to change that would change the feel and character. There should be different “circles” of minimum lot sizes across a range of areas
- Accessibility important e.g. lifts in town houses

Improved infrastructure is needed with any change in housing

- Need for climate resilience – people cannot be left without power and water for days. Overhead cables should be put under the ground. Any future development should take this into consideration.
- The infrastructure is already failing to serve the existing population at train stations and along the Pacific Highway. There is also a need for public parking.
- There is a need for greater consideration of schools when analysing the housing needs
- Developer contributions must be enforced so that density can provide a balance with the provision of open space and parks
- A transport tunnel from Chatswood to Hornsby could better manage traffic arising from housing changes

The need for housing options and capacity

- There should be an opportunity to subdivide large lots but provided the regulations stay strict and controlled. Subdivision could also allow the opportunity to have small groups of villas that are all single level houses.
- Older houses are being replaced with large homes for one family, there could be two families living there if the planning laws would allow it e.g. in villas or dual occupancy (horizontal or vertical strata). This option would help young people and young families who could not afford a large separate dwelling.
- Being close to the station is important for young couples
- Consideration of rental issues in housing scenarios is important
- One storey villas for elderly is required
- Housing options must still ensure sites are left and safeguarded for future use? There will be more population growth after 2036.
- It is often desirable to have taller buildings with more open space; however, townhouses can take form in the existing stock but only in circumstances where it is strictly controlled by the council, in particular in relation to retaining tree canopy and the design.
- Providing townhouses will ensure people have a housing mix and a choice
- Mixed use buildings means less security, less privacy and more noise in the evenings
- Discussion about feasibility of up zoning -acknowledgement that revitalisation will not occur if it not viable
- Townhouses don’t need to be in the centres
- There is a need for strict controls on townhouse, villas and apartments
- Sensitive design and planning for new housing near shops and schools is important
- R2 should allow for attached dual occupancy
- Subdivision of land and houses could occur near schools
- Baby boomers are ageing but also computer literate, and thus still need traditional 2/3 bedrooms is useful
- There should be strict design controls for townhouses and villas
- As the footprint expands, the density should be reduced too
- Capacity of the area to accommodate housing - there must be consideration into what kind of development is suitable to put near biodiversity. Areas cannot be identified for new higher capacities where there is vegetation and biodiversity throughout
- Steepness of west side (accessibility issues) needs to be reconsidered especially for housing the elderly

» There is insufficient diversity of housing in the area, predominantly due to land value and potentially the feasibility for a developer

» Difficult for people to consider living in apartments (particular middle aged), but responding comment that people have long lived in apartments (e.g. in Europe).

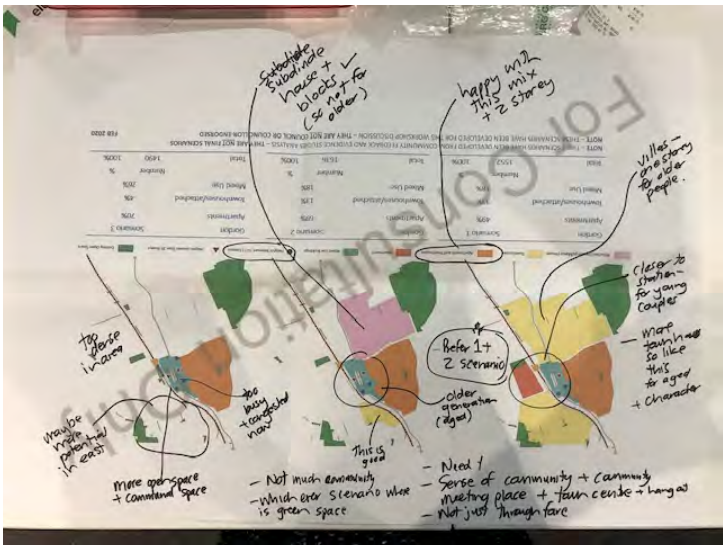
» Living in high rise buildings but ensuring there is plenty of open space is acceptable

» Townhouses on both sides of the highway will give people choice

» There is more housing potential in the east

<u>Housing Strategy Engagement Process</u>

» There was an awareness by many that if the council does nothing, then the state government comes in and imposes sites. However, there were comments made that many community members were not convinced that this community engagement will actually influence what Council puts on the ground. Council has a history of deciding on their own.



Workshop 2 example of participant input

Community workshop 3: 17 February 2020 - St Ives-focussed

In the community workshop focussed on St Ives, some participants did not like any scenario suggesting that St Ives was too constrained. They suggested there may be an opportunity for mixed use development at the shops but that it should be of modest height (not ten storeys).

Some participants were generally in favour of the direction in Scenario 1 but with modifications. There was a feeling that the transitions between some land uses was to severe (e.g. between 5-6 storey apartments to attached/manor-house typologies). These participants felt that there isn't enough consideration of other factors, such as school locations. Some stated that they would like to see 50-50 of apartments and townhouses to reflect the housing needs analysis.

Many expressed that a diversity of housing was lacking, particularly townhouses. Some expressed that too many people are forced out of the area because they cannot find the right housing.

There was some particular concern about SEPP Seniors Living that was a key discussion point, with a few participants discussing the lack of amenity and dilution of character this creates.

Some participants at the workshop thought that other areas, like around Pymble Station, would be better suited to development with some housing. They expressed that Pymble also required downsizing options and that the shops were sub-standard.

It was also expressed that other areas within the St Ives area should be considered, particularly around schools, not just a focus on the centre.

KEY COMMENTS ILLUSTRATING THEMES DISCUSSED BY WORKSHOP PARTICIPANTS

Below are the key themes raised by workshop participants and key common comments.

Maintaining character of area/green space

- *'The greenery, canopy and trees is what everyone loves about the area'*, even in recent times when these assets have become hazards, it is still important for these assets to be retained and respectfully managed
- In an area that is supposed to be green, why place high-rise in the area? (opposing comment that we have to take our share)
- Lower density should be respected, but there should be a good mix to cater for everyone
- Problems with high-rise right against main road with no green space, there are no gardens
- Rezoning for certain densities should have green space courtyards

Views on the need for housing mix

- One participant stated that their current house is too large to maintain as we move through our life stages
- *'We do not have an adequate housing mix'* – we have separate dwellings and high density apartments, there is nothing in between
- Some big houses on big blocks, some high-rise is good – we need both of them, but medium density is really lacking and this variety is required
- Housing future in Ku-ring-gai needs to be sympathetic to existing population, as well as attracting a new population
- Need for typology that can cater for the ageing population, something that still has a garden, is single storey or has a lift, we do not want to live in a unit. Nobody wants to live in a unit. People who are buying the units are not people that have lived in Ku-ring-gai.
- Unsure about whether younger people leaving the area is an issue. '*I don't think we need to bend over backwards to make Ku-ring-gai a hub for young people'*, it's not what they want – why would they want to stay here? They may move back here in 20 years when and if they can afford it.
- Ready financially to downsize to a 3-bedroom townhouse with a garden. *'People should be able to downsize to the suburb they live in, if you love the area and the people around you'*
- Scenario 3 would be an imitation of what has happened in the last decade, nobody wants that and it doesn't achieve the desired mix of typologies that has been expressed throughout the engagement
- There is not enough housing choice in Ku-ring-gai as people age – there needs to be more apartment development in appropriate locations and other housing types such as townhouses
- There are good opportunities in the LGA to increase densities – apartments, townhouses, and dual occupancies
- Too many people are forced out of the area because they cannot find the right kind of housing
- Townhouses are so expensive because there is not enough supply
- There needs to be consideration of housing when people's circumstances change for example, one participant has a disabled daughter and it is difficult to find the right kind of housing.

- Diversity for housing choice, typologies such as townhouses, will still be able to keep the character whilst accommodating new population numbers
- Who are we building these homes for, noting that apartments are appealing for young people as they are more affordable?
- Gradual transition in the density of housing typologies is required
- Not everyone wants to live in apartment
- Need housing for aged but need single storey, not units
- More medium density

Planning controls

- *'Ku-ring-gai's current planning controls are too rigid'*; this needs to be considered when Council facilitates medium density development – it is currently impossible. Medium sized houses are needed to downsize too and there is currently very little available
- *'Seniors SEPP Housing is not a desirable option for downsizing'*, they are not well designed, not well regulated and are far too expensive for what you get
- Felt that SEPP Seniors Living does not encourage transparent processes by developers and their interactions with Council
- Noted that SEPP Seniors Living has seen 18 townhouses that have been approved by the Land and Environment Court
- SEPP Seniors Living housing is not near transport so this is a concern, dwellings are not sold to seniors and are not affordable

Need for urban/retail renewal and vitalisation

- *'Urban renewal around the centres really needs to happen'*, make the most of the town centre
- *Discussion around whether high density should be along the main roads or not*
- If there was to be development in St Ives, it should be located within the centre and be in the form of mixed-use development, cafes and shops at the ground level with less than ten storeys on the top
- Make Pymble more of a hub, this could take pressure off St Ives and more off the other centres
- Dwellings need to be fully occupied with a mix of people
- Need to have that gradual transition. West Pymble and St Ives North shops – two examples of great existing communities but the shops struggle because there isn't enough density there. Some villas in these neighbourhood centres would be ideal (with strict development controls).
- Upgrading of shops in Pymble, *'Pymble could do with a hub'*
- Eateries would be ideal, thinking about Central Park/Central Station
- Retirees close to the town centre and shopping centre
- Grandview Street – a new hub
- Grandview little shops, protect the hub already developed
- *'Smaller centres make sense for older people'*

Transport

- Need for parking at stations, it is currently insufficient, as the area grows, infrastructure needs to be developed to support the population
- St Ives is the only local centre not on the train line, so reconsider this as a housing centre – *'St Ives needs better transport infrastructure before increasing population growth'*
- St Ives to North Ryde is too long to drive, we need train hubs

» Rapid bus transit is required as there is no train system otherwise numbers need to reduce
» There is no infrastructure for high density - medium density is the way forward
» Because there isn't a good transport system, new development shouldn't contribute to urban sprawl
» Medium density is good, keep it around the town centre (don't move it out as there isn't public transport to support this)
» Whatever is built there must be car spaces so the roads are not congested
» Proximity to train and shops is important
» *'Walkability to the town centre makes sense'*
» Safety issues with current pedestrian routes need to be considered
» Where you live affects how you get to work, in St Ives you have to drive more than 30 minutes to get to work
» There should be greater densities around the station side in Pymble
» *'Why is St Ives taking the same load as Gordon, Lindfield and Turramurra when we don't have a train station or the transport infrastructure?'*

<u>Schools</u>

» Important to take into consideration proximity to schools
» Who are these houses being built for? The centres approach is predicated upon the assumption that people want to live near local centres, but what if people want to live close to schools?
» There should be good development close to schools
» *'New housing in close proximity to schools'*

<u>Traffic</u>

» With new development in the centres comes more cars, parking and traffic must be addressed particularly on roads such as Killeaton St.
» Link Road is already experiencing heavy traffic congestion – we can't put more people here
» If apartments are to be built on the main road, then access needs to be from the rear of the apartment, not the main road

<u>Heritage</u>

» Heritage studies are never done in St Ives; we have some amazing homes with great history that are not recognised via heritage listings
» *'Heritage needs to be looked at, there are fabulous home in St Ives to consider'*

<u>Options and constraints</u>

» *'Should every layer of constraint be given the same weighting?'* E.g. schools, main road, public transport, shops should be included
» Concerns that every scenario is loaded towards apartments
» Apartment heights are too high
» Prefer Scenario 2, but it is still heavily loaded in favour of apartments and mixed use
» Underlying land value issues with townhouses which is why townhouses aren't suited for the centre – apartments are more feasible
» Which scenario would create the least visual change?
» If this housing is being located from a strategic perspective – Council must consider transport, open space, schools, medical centres, grocery shops

» Lower density and smaller area (around 400m)

» Development has already commenced thus it is not a real scenario

<u>Other</u>

» A lot of issues can be overcome with good architecture

» Issues with transparency and disclosure of vested interests such as developers attending workshops

» Environmentally-friendly development

<u>Other locations that should be considered in the Housing Strategy</u>

» Some participants at the workshop thought that other areas, like around Pymble Station, would be better suited to development with some housing. They expressed that Pymble also required downsizing options and that the shops were sub-standard. They also thought there was *other opportunities around schools and other centres that have not been considered in the scenarios presented*.

» *'Traffic issues in St Ives – stations like Pymble, Killara are far more suitable for additional housing to allow for transport connections'*

» It was also expressed that other areas within the St Ives area should be considered, particularly around schools, not just a focus on the centre.

» No preferred scenario expressed and instead thought it best to look at options in other suburbs not St Ives

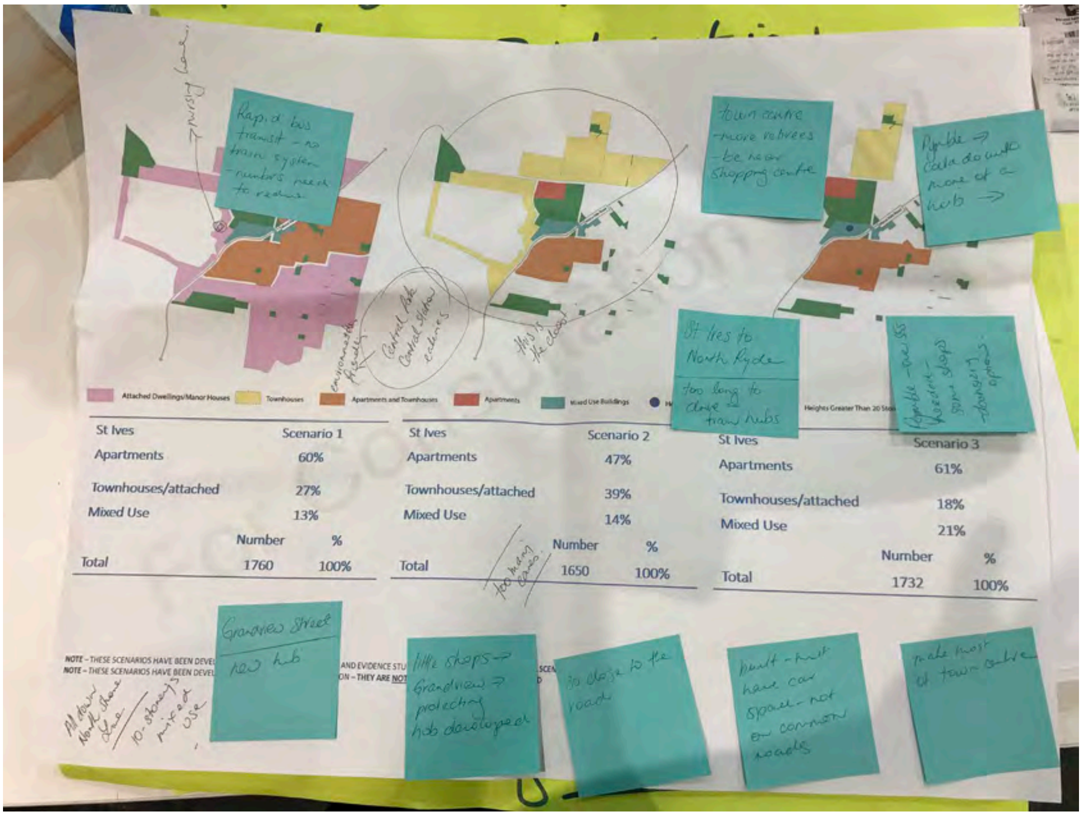
» *'All down North Shore line – 10 storeys mixed use'.* We can take our share in this location.

» Lindfield is ideal for units as these would sell well

» West Pymble to Chatswood, see as secondary centres

» St Ives North – potential for a smaller centre

» Continue the housing trend on Link Road to further down to Horace Street between first and second roundabout



Workshop 3 example of participant input

Community workshop 4: 18 February 2020 – Turramurra-focussed

In the community workshop focussed on Turramurra, workshop participants suggested that other areas should be considered (such as South Turramurra with improved interconnecting transport to the train station). One option was that areas close to schools should have more diversity of housing. Others expressed that there should be more of a 'spreading the load' approach.

Many workshop participants acknowledged that Turramurra centre needs revitalisation and that a compromise with height was likely the only way to achieve it. There was support for the Turramurra hub project from some participants.

One resident who could not make the workshop said that he felt that development should focus on the core of the centre to provide the dual benefits of revitalisation and diversity of housing. Like this resident, some of the some of the participants at the Turramurra-focussed workshop said they prefer keep redevelopment to the core of Turramurra.

Other participants expressed a 'no housing, no more people' perspective in that if you do not build additional dwellings, there is no opportunity for population increase.

KEY COMMENTS ILLUSTRATING THEMES DISCUSSED BY WORKSHOP PARTICIPANTS

Below are the key themes raised by workshop participants and key common comments.

Transport

- Importance of commuter car parking near railways
- *'Need for smaller, electric neighbour bus services into the suburbs'* such as on demand community buses
- There should be more regular buses, which also run later and better connections to Macquarie Park
- North Wahroonga huge retired area, but it is too far out from public transport (e.g. can't get to city easily)
- *'Near train stations is a must for development'*
- Better planning is required for density development and there needs to be regard for *'requirement for car parking and parking at the rail station'*
- Underground parking in Turramurra is an option
- Plans need to be made for the roads and managing traffic

Diversity

- *'Granny flats would allow a cheaper renting option for young adult children and the elderly population'*
- Housing needs to be sympathetic to the existing area but also attract all age groups
- We need a range of demographics
- Diversity in housing makes a community

Character

- People live here for the leafy, big area
- *'If subdivision is allowed on larger lots, there is a risk that Ku-ring-gai could lose its unique character'*
- Need to preserve tree canopy
- High density may lead to a loss culture and environment which is taking away people's choice to live here
- *'The 'green space' – which is precisely why we all enjoy living here.'* We have our gardens and Ku-ring-gai offers parks and bush as well

Design and sustainability

- *'Sustainability elements need to be integrated in the planning'*
- Good design and ensure vegetation
- With any scenario we need more open space
- We need to see sustainability considerations in any housing planning
- More agile working considerations in housing, many work from home

Infrastructure

- There is already so much pressure on our infrastructure. Adding population into an existing space will create more stress on infrastructure. There is still the opportunity for greenfield sites to be developed in tandem with infrastructure in other areas of Sydney.
- Building housing will mean we need more and broader infrastructure not just local infrastructure

Lot size and ability to subdivide

- *'We don't want to lose Sydney's traditional large lots for young children to play in.'*
- *Being able to subdivide one lot doesn't have as big an impact on streetscape'*
- Worried whether kids will be able to buy a property in Sydney. Large blocks are not utilised. I'd like the opportunity to utilize my 1,500 square metre backyard through subdivision, granny flats or medium density. I don't think it should be a blanket rule, but it could be an option for individual land owners to make the choice.
- It is important to have a garden, but some are too large and too expensive to maintain and people's needs can change, perhaps at some stage moving from a big garden to something else.
- If I want to go to a unit, I'll go to Kirribilli or McMahons point. I've never contemplated living in a unit in Ku-ring-gai. Ku-ring-gai is not a place for units, it is a place for families to be raised in large lots with gardens.
- We're spoiled with lot sizes here and we like being spoiled
- Subdivision should be allowed so that you can provide more for your family, or to be able to finance staying in the area
- We can't use our large block, so there is an opportunity for town hoses and subdivision

Manor houses

- *'Ability to rent or sell a portion of your house'*
- More flexibility within controls for what you can do to your home
- Zoning restrictions were commonly questioned, why are residents not able to do granny flats
- Townhouses and manor house development and subdivisions must be throughout all suburbs
- Minimum lot size must be reasonable

Affordability

- There are young adults who work, or study near here and they can't afford to live here, *'there needs to be greater affordability for the young, downsizers and ageing populations.'*
- *'Too much concentration in one area and medium density will increase prices'*
- How are these scenarios going to address issues surrounding affordability? These scenarios will push the price up even more.
- Young professionals cannot afford to buy in area and instead live at home. Establishing a granny flat can assist in rent and avoid strata fees as new units are often not affordable for young professionals.
- Price on the north side are higher than the south side which means development should be more feasible on the south side

» If design quality can be upheld in granny-flats, then this would also allow for a second income for some property owners and ensure young professionals can be retained within the area

Housing around centres - stations and shops

» *'Need more development around stations and shops, there are underdeveloped areas'*

» *'Can't just concentrate in centre as then it won't fit in with the rest of the suburb'*

» *'Yes - want revitalization – understand planning controls'*

» We need townhouses but a little bit further back from the town centres

» Range of different demographics all in one area is good - that is what makes a community

» Preferred Scenario 1 but there should be more development spread out to the south of train station (constraints such as slope and biodiversity can be dealt with at DA stage). This will ensure that it is not too concentrated by spreading towards the suburbs.

» The core area is currently derelict and needs to be renewed

» Not in favour of a broader approach (townhouses etc.) as additional housing needs to be very focussed on public transport to minimise increased traffic congestion.

» Appreciates the Turramurra Hub project will improve the town centre, including open space resources. This should be the focus.

» Downsizers, need to consider physical accessibility issues

Apartments and townhouse are smaller to maintain

Locations near shops and transport and the station

Lower level townhouses

Views towards apartments and townhouses

» *'Scenario 3 would ensure that the rest of the suburb retains its local character'*

» *'I am against scenario 3 because it results in the highest number of dwellings'*

» *'Less apartments or split up locations so not concentrated'*

» *'Prefer more townhouses across Scenario 1'*

» It looks like the whole of Turramurra will be rezoned for high density, this is distressing

» I am concerned that grouping 'apartment and townhouses' together may mean that we may end up with all apartments. Height is a concern; would they be 9 storeys?

» Townhouses near Cameron Park that present as low-density houses but go back a far bit, these are a great example of medium density that is in keeping with the local character of the area

» It doesn't bother me if high density is along the highway, it might bother other people

» We don't want to be creating little ghettos of apartments on every site

» High density should be stepped down hills so it isn't as imposing

» Would young people even move in to the new apartments, it would be downsizers moving in

» Apartments should be broken up and scattered if high density must be there

» Townhouses/apartments should be limited to two storeys and green spaces

» Ku-ring-gai is not a place for units

» 4 blocks of 10-15 storeys is too much in a concentrated area

» Need to consider impact of shadow from blocks of apartments

Constraints

- Steepness isn't a big issue, don't discount this land
- Need to widen parameters as you are limiting yourself to specific blocks which then creates interface issues
- Heritage is limiting the opportunities
- Not all designated white areas have been developed

Accessibility

- Concerns about people moving around in areas which are already built up. Would like to see where the pedestrian and bike paths are going as these would accommodate the increase in population in those areas of new housing
- This plan will create more bottle neck at the Turramurra centre
- Increasing traffic is high on everyone's list of problems and questions

Schools

- *'We understand the local centres logic (density near transport hubs) but there are also other facilities that need to be considered – schools, shops etc.'* This would mean less high density. We could distribute medium density throughout the suburb – with a strictly capped height.
- Consider where the schools are (would rather live closer to this than to train stations)
- Should add density around schools so that people aren't making commutes to them, alleviating public transport issues in some places

Other

- Leaning towards Scenario 1, but not really that happy with it
- I do not like options 2 and 3
- I had difficulty figuring out relative scale and perception of scenarios without:
  - Street names on the scenarios
  - Existing development blocked out on scenarios
  - Existing zoning on the scenarios
  - Existing dwellings in the area currently on the ground
- How are childcare centres in suburban streets being approved? There are too many and it's not fair for these to be in the same zone as low density residential
- A lot of this is a self-fulfilling prophecy, build the houses and they will come – if we don't build the houses then they won't come
- Council is too conservative in the way they are trying to plan this, not sure if I trust this
- Concerns over Scenario 3 in terms of aesthetics, congestion and traffic – not enough of a transition, too much dramatic change.
- Is the amount of people being engaged statistically viable and representative of the entire Ku-ring-gai community?
- Family groups aren't only nuclear families – multi-generational housing is important
- Crime and loneliness is a problem with apartments
- A Council Alderman should have been present at the community workshop

Other locations that should be considered in the Housing Strategy

- Why are the capacities limited to town centres? Why are townhouses only on west side? Why is there no scenario where there is a distributed arrangement, there can't just be blocks of all apartments together

» Frustration with how Council has framed this with a) b) c) to choose from. There is a large capacity within the suburbs of Turramurra to allow for subdivision or granny flats that would mean we don't need high density. This solution would be suitable for young adults, ageing population and multi-generational households. Don't limit to boxing in of certain areas.

» We need a fourth scenario, preferably one with less apartments

» Development consideration area is too narrow, there are opportunities everywhere, need to spread out

» Distributing development would also distribute the traffic

» *'Wider investigation area to North and South Turramurra for subdivision'* (this contributes to affordability as land sizes are smaller and not as expensive).

» One participant felt that development examples that are near Cameron Park

» Re-look at the areas with 'potential' or 'some potentials' as current scenarios do not take this into account

» Consider additional townhouse development – nearer schools in Wahroonga

» Extend townhouse wider e.g. to Fox Valley Rd and up Pacific Highway to Bowling Club

» *'How about development of Warrawee Station'*, townhouses near Knox School

» South Turramurra should have options for townhouses, steepness should not constrain this option

» Council is focusing on one area and medium density housing shortage needs to be addressed throughout all suburbs, one of these options extend far enough across the council area

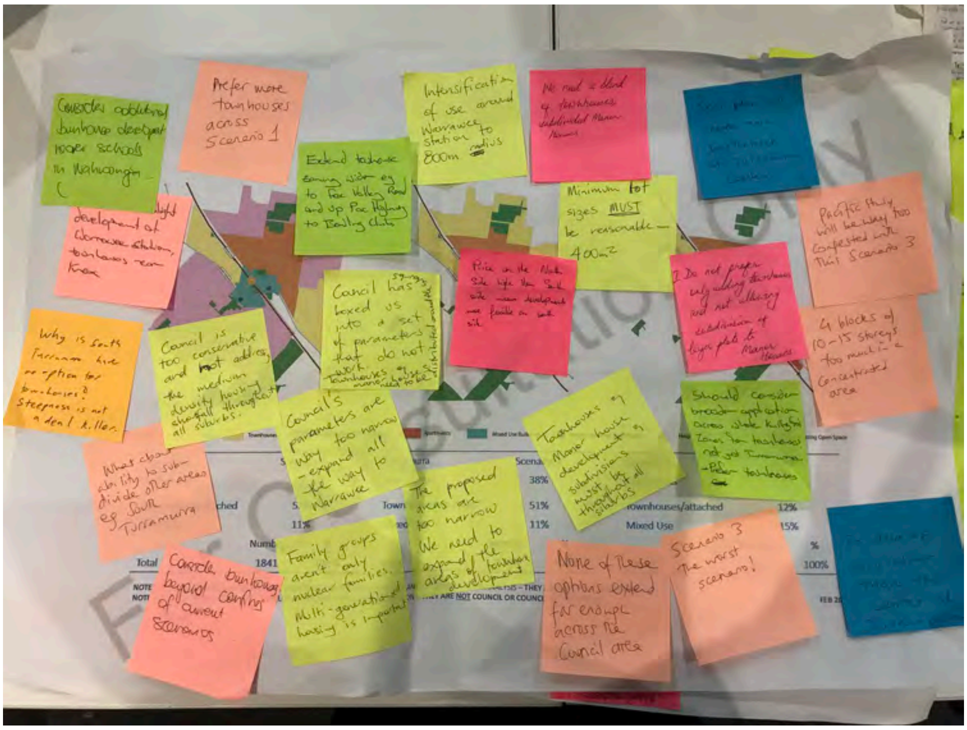
» What about ability to sub-divide other areas e.g. south Turramurra

» *'Consider town houses beyond confines of current scenarios - across whole Ku-ring-gai'*

» The proposed areas are too narrow, we need to expand the areas of townhouse development

» Recommend widening the zoning – pink/attached manor houses and townhouses to South Turramurra and south of the Pacific Highway

» Will there by opportunities to further discuss options on the other suburbs mentioned, i.e. Warrawee and Wahroonga?



Workshop 4 example of participant input

Community workshop 5: 19 February 2020 – Resident Action Groups

Participants at this workshop were provided the same introduction to the presentation as the four other community workshops. Participants were then presented discussion scenarios for all four centres and provided the opportunity to discuss centres.

SUMMARY

- Opposition towards apartments/high density as it does not fit the green character of the LGA was expressed by a number of participants.
- Some participants questioned the housing target numbers and the need for additional housing in the LGA.
- Many participants stated that infrastructure studies suggest that there is no more capacity in the LGA.
- Concerns about traffic and movement systems were expressed by many participants.
- Some expressed that there is a place for density around stations but we have concerns about how that would be done taking into account all considerations, particularly green space and traffic.
- Density along the highway was considered by some, explaining that land there is already zoned high density so it should be taken up first before encroaching upon residential land and heritage areas.
- Some thought that higher density around station would be acceptable as there is a need for a mix of different housing typologies.
- One participant expressed concern that broadening the development footprint could exacerbate developer 'cherry picking' of sites in centres.
- Some thought there was some potential for the manor house typology, suggesting this could preserve the character of Ku-ring-gai.

KEY COMMENTS ILLUSTRATING THEMES DISCUSSED BY WORKSHOP PARTICIPANTS

Below are the key themes raised by workshop participants and key common comments.

<u>Why a Housing Strategy</u>

- We need to decrease the population of Ku-ring-gai, actively.
- There is no point playing the planning game, we should be playing the political game and fight this politically.
- Uptake of apartments are from overseas investors; we can supply all we like for the existing community but they may never be met if what we deliver is taken up by overseas investors. Migration needs to be addressed and could impact community comments.
- Why are we accommodating community members that won't change housing, they should move.

<u>Capacity Analysis</u>

- Heritage areas in Lindfield have been purposely ignored by Council staff to keep it on the back burner for future development.
- 15-minute walkability on the map is incorrect as it does not take into account topography. For example, on the west side of Gordon it would take a mother with a pram a lot longer to walk up the hill.
- Are additional State Government permitted development such as boarding houses, SEPP Seniors Living etc. counted as part of the new dwelling yield for the Housing Strategy in the four nominated centres? Will these developments be over and above the 6,600 new dwellings discussed at the workshop?
- What is the remaining undeveloped dwelling yield figure for each local centre please for Roseville, Lindfield, Gordon, Pymble, St Ives and Turramurra to January 2020? This is important as I have been told that there is sufficient yield for the next five years.

Turramurra

- Suggestion that constraints layers are missing including:
    - Traffic black spots, congestion areas, emergency vehicle access (Traffic and Transport 2000 Study)
    - Wildlife corridors and tree canopy – and the cumulative impact on tree canopy from multiple developments
    - Contributory houses in Heritage Conservation Areas – there should be an overlay of contributory houses on the constraints map to ensure that any adjacent, 'edge effect' development does result in 'theft of amenity' and heritage interface areas must be respected
- There are enough traffic, trucks, parking, congestion and infrastructure issues as is, let alone with population increases
- We need discussion on an acceptable built form in an acceptable area. If done the right way and in the right location, then existing residents who would like to downsize can be given priority
- Why should old people's demands impact the whole Ku-ring-gai community?
- Ku-ring-gai is a rotating suburb – kids – move out, parents move back in, elderly move back out and give houses to the next generation to have the opportunity to do what we were lucky enough to do. Is this compromising inter-generational equity? Can we recognise diversity? Different LGA's have different unique stocks for a reason, each LGA serves its own purpose. Should we retain family homes?
- Important to consider Traffic and Transport study 2000 and 2000 Environment Study
- There is rotating occupancy at 84 schools and pre-schools in the area

Turramurra Scenarios

- Preference of townhouses over high density
- Manor-home conversion of properties is acceptable
- Scenarios are based on conflicting ideologies as people want townhouses but not the breadth of invading the suburban streets
- There appears to be trade-offs between high-rise and townhouses. Concerned that existing townhouses will be rezoned to higher density.
- High rise apartments are the worst possible outcome
- The fear is that if areas are zoned for townhouses now, in the future they will be zoned for high rise and it's a smaller jump – the trees and area will already be compromised so the jump to high density will be more likely to happen
- If we go the lower scenario are we leaving sites for developers to cherry-pick? Perhaps it's better to go for a more moderate option.
- If you're going to have high density, it should be close to transport
- If we are working under the assumption that high density has to go somewhere, the ideal place for them would be along the Pacific Highway.

St Ives Scenarios

- How can we be sure that Development Control Plan (DCP) controls such as height limits are enforced?
- There is a riparian corridor in St Ives that doesn't seem to be highlighted on the constraints map
- Consider BGHF, Browns Forest is significant
- Need to check the location of the wildlife corridor along the riparian corridor
- Infrastructure does not keep up with development e.g. traffic lights
- There was discussion surrounding proposed transport / mass transit infrastructure for St Ives

- St Ives has become dysfunctional due to noise and congestion. There needs to be some sort of overlay or quantified measurability of amenity – it is not currently a pleasant place to live. We can't put more housing in an area of such low amenity. This lack of amenity is very visible. There needs to be some consideration of what has happened there in the last ten years. We can't just start off fresh from today's jump off point.
- Design quality, landscaping, tree canopy are key considerations - concerns regarding tree canopy destruction, in particularly on the western side of St Ives
- What is the rationale and logic of the centre's location?
- Is additional housing acceptable with design excellence?
- Concerns about infrastructure not being delivered before or when new housing is provided
- Recommend that development be kept away from the Darlymple rain forest because there is historical significance regarding the first fleet and Governor Phillip. It is also the largest Blue Gum High Forest (BBHF) remnants
- Like the concept of trading in carbon credits, Ku-ring-gai should trade it's dwelling requirement with LGA's that want to develop high density for investment – so that the overall impact of the density is the same for Sydney but Ku-ring-gai can maintain its uniqueness
- Can we renegotiate with Council – downwards the number of dwellings to be developed, and trade quantity for quality?
- In St Ives, the idea of houses to apartment typologies are sometimes quite attractive.

<u>Lindfield Scenarios</u>

- In the heart of Lindfield Estate, there were heritage studies being done to make it a Heritage Conservation Area until it was stopped by the government this is a strategic area for developers and was deliberately left out of becoming an HCA.
- Lindfield streets are too narrow making parking already difficult
- High density development was to stop traffic increases, but it has done the opposite, it has created traffic congestion (e.g. Lindfield Avenue)
- Infrastructure needs to be considered as a whole site not just target some suburbs as a development of Lindfield will have flow on effects elsewhere
- Very silo on how/what we consider development we are only considering housing but not other sustainable needs such as traffic, waste, environment and schools
- Congestion and transport must reach a certain scale in a city before high-rise solutions are required
- High-rise is not making areas liveable, its making chaos there are too many people
- We need more villa with no stairs, retirements villages, green spaces and nursing homes
- We need to better utilise open space e.g. school grounds for children not professional sport
- Movement in the areas around schools is an issue there are 5 primary schools within 500-800m of the station and potentially 4 supermarkets
- Driving to the station and parking is an issue, concentrate density around the station in an 800m walk radius
- Peripheral villages capacity where amenity is good density may be considered
- Traditionally developers have ignored the highway and cherry-picked residential sites first
- Development around the highway first, if we give them early subdivisions and heritage properties, then we will keep having the same problems, our local centres will not be revitalised (but Lindfield Avenue is a complete nightmare)
- Does not matter how we focus the targets, the changes and on flow effects of metro or new lines for increasing population are going to be bad. The capacity must be there if you are increasing density

- Remnant BBHF along ridgelines, development of high density there isn't providing enough deep soil planting to be able to grow these trees.

Gordon Scenarios

- City gradation opportunity and not let it go, the rail corridor is sorted and car parking around it, great place to see other people. It has to be walkable otherwise traffic will increase, much of the west side of the highway isn't walkable. This is where the idea of a manor house is good, still maintaining character and scale but allow for higher density.
- Infrastructure SEPP wasn't applicable because of low water flow, they couldn't put in more density on that side of the station - Council should refer to studies that were the basis for planning in 2000.
- If we are increasing the amount of people, then you have to consider run off effects (water and sewerage) and what happens in an area of high population. Blackbutts Creek has a sewage overflow.
- Ability to make central place over rail (but recognition it is a heritage listed rail line), there is capacity here for more density (has the most capacity for density around stations). When you look at centres they are developed based on hierarchy and Gordon is the highest one. It is a geographic centre with intersections of big roads, it has the capacity to have a higher level of retail.
- Traffic is already an issue and dangerous around schools and nursing homes.
- Many busy roads in the area: St Johns Avenue traffic rat runs on a very narrow road, roads around schools, and there is no more capacity
- Gordon is not functioning well, but better choice than Lindfield for shopping because of car park, hazardous for young families and ageing population
- Dysfunctional because of additional units, the infrastructure and shopping centre is not keeping up. There are too many people to support and there needs to be upgrades. Problems with Wade Lane carpark filling up. Revamp the shopping centre.
- Underground section on highway and create a plaza through the whole area to create a nice place.
- Better to concentrate density here and deal with the extra cost because it has got capacity.
- Low-scale development in keeping with the village style
- Different forms of housing and affordable housing in key areas
- Ku-ring-gai most impact of inter-war areas in all of Australia, still up there in terms of quality but units are creeping down the road and people are selling to developers because they don't like the changing amenity of the area.
- Development where it looks same proportion in scale as surrounding but would accommodate more than one family
- We need to be making more of the existing housing stock
- Units are ordinary and poor-quality housing which leads to maintenance issues – we need better quality, and there is a need to look at controls
- Issue of quality – need to prescribe quality of design and flexibility to build whatever typology you need. The type you can choose as long as the form fits with the control of suiting the surrounding streetscape.
- Revamped shopping centre needs to be handled properly, how to compromise with developers. You can continue to have what you've got or you can have better things with compromises. Mixed use is okay if then you get good shops and good apartments. How badly do you want the revitalisation of Gordon?
- We can look at a problem example with Chatswood: big centres that start pushing for more density becomes a Catch 22 situation, the more you upscale centres the more density they want.
- If you've got enough people to be around to fill the place it creates a lively dynamic.
- Other locations that should be considered in the Housing Strategy in Gordon:

The area along Ryde Road would be better for high rise because you have a busy four lane road

In the valley - be careful of national parks and the creek but high density is hidden in the valley because of the depth, that is where density should go, as then it wouldn't impact Ku-ring-gai's character. However how would you access the station from this.

Density and revisiting desirable for smaller centres like West Lindfield and East Lindfield

General scenario comments

» Based on a false promise that there is some implied necessity for a certain amount of dwellings
» Importance of staging development – so that not everything is taken up in the 5 years
» Manor houses are better than a block of units
» Scale of maps vs aerial, is not even and makes it confusing
» 10-15 storeys – that means 15 storeys
» Have the constraint layers included issues like traffic hotspots, traffic problems – this needs to be an overlay on constraints mapping? There should be another layer.
» What has already been built is overflowing into the suburbs is it can't be said that only the four centres will be focused on if development is already happening outside them
» It would be good to see a scenario of proposed infrastructure, as this and consideration of traffic need to be addressed before any new housing is introduced
» In these areas can you repurpose very large houses, families who want to stay in area, we should be able to split these and have higher density, engendered density??? It is a way of improving density. This repurposing has to be done in a controlled way. It is also beneficial to adapt these homes from a sustainability point of view.
» Most young people don't want to live in Ku-ring-gai until they have children, they want to get out and explore the world.
» People coming in are mainly young professionals who can't afford a home, but people coming in and renting for a short time before they move on.
» Many people renting houses have 1-3 kids, they stay a few years and then move on.
» Part of community, when in a unit, kids walking along Pacific Highway to a unit, there is no amenity – is this the reality so people can afford to live in Ku-ring-gai?
» All units which look the same with no gardens.
» Some gardens are too large; with all the facilities we don't need all those big houses.
» Why does every area have to be the same, why does it have to be crowded out with over development?
» Sydney has been renowned for all these different areas and what they offer in terms of lifestyle choices, where is the uniqueness of each area?
» Diversity so people can have choice; people who like a certain typology, things that are accessible
» Create a variety of housing types that suits people here that go through life changes
» A lot of our households are low density with 1 or 2, we should as a society repurpose those (even though family raising area we can't turn this over).
» We need more green spaces, near Killara primary school (all enclosed in). Children can't access it to play or ride their bikes. The green space on Spencer Road is down a steep road and is a swamp when it rains. West Lindfield area little park, there is always someone there.
» Issues with schools being closed when it could be used as public open space
» Problem is it is overtaken by self-interested teenage groups, generating noise pollution.

» Lindfield has a congested centre with a supermarket, Masada private school, special school on Tryon road, Lindfield Public School, all within 500m of station. This means there is traffic from east and west Lindfield trying to access station. No other suburbs in Ku-ring-gai have that many schools in such close proximity.

» **Mini summary** - Concerns about traffic and movement systems, desire for something smaller and more manageable on a lower scale, there is a place for density around stations but we have concerns about how that is done with all considerations such as green space.

» Density along the highway, high density is already zoned land and should be taken up first before more residential land and heritage.

» Density around station, need different typologies and a mix, potential for more manor house types.

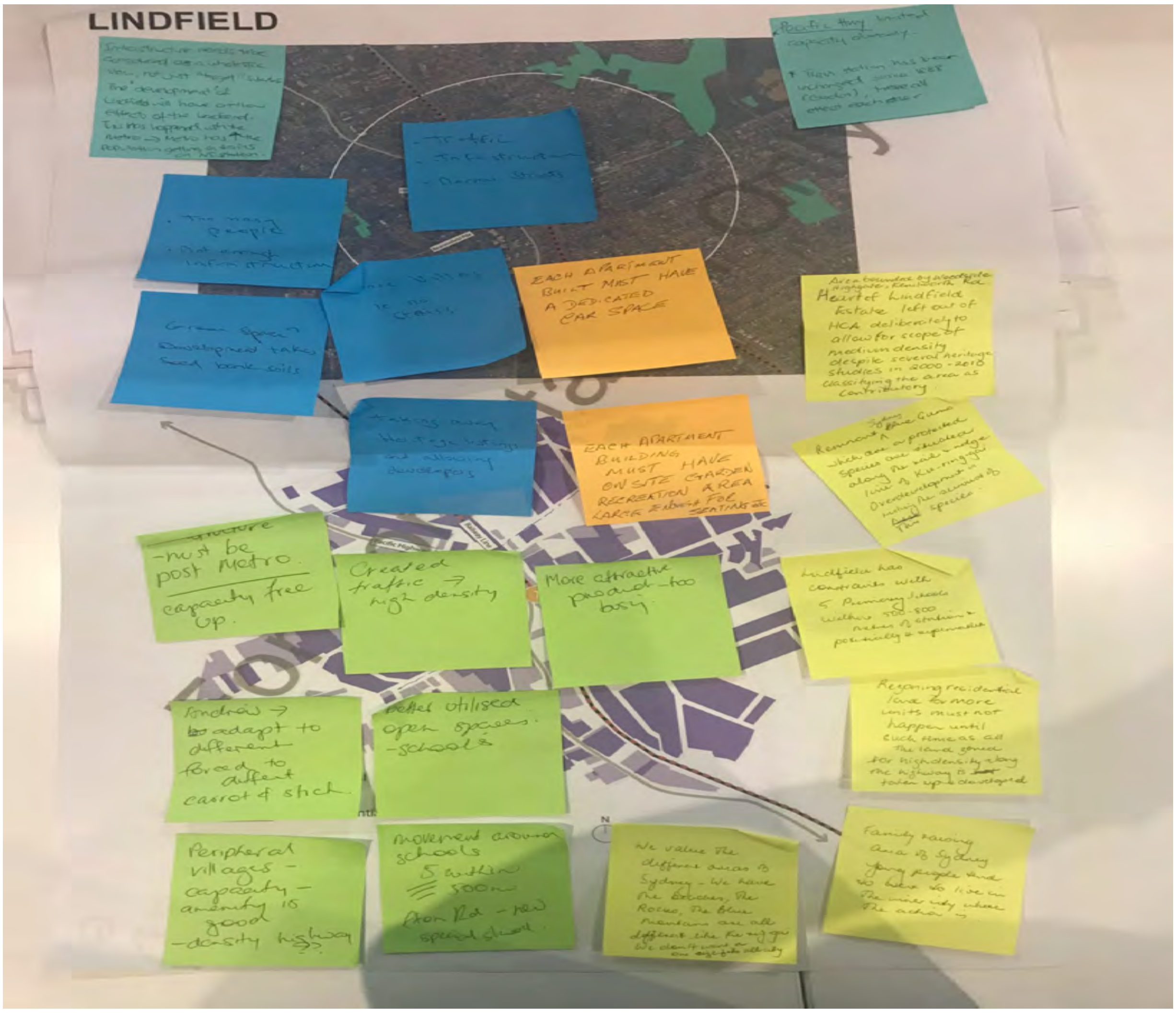
» How hard is it to compartmentalise houses and create manor houses; it that would make sense to do this.

» Boarding houses, SEPP Seniors, nursing homes are being placed anywhere (and in fire prone areas). These additional dwellings are where the Housing Strategy number can start to spiral out of control as the State government is allowing additional development to occur.

» Developing neighbourhood centres (500m round neighbourhood centres?)

» Developing neighbourhood centres? Should they be considered if local centres didn't take all the capacity?

» Traffic on roads around schools e.g. Ravenswood East and West Gordon – Beaumont Road, West Lindfield, early childhood day care on Lady Game Drive - going to pick kids up is dangerous. Fiddens Wharf Road is a racetrack most of the time (noise of traffic). St Johns Avenue, Browns Road, nursing home in Bushlands Avenue, hardly any of these roads are guttered or curbed, they are undulating with blind corners.



Workshop resident action group representatives - example of participants input

Community workshop 6: 20 February 2020 – Youth Focussed

Participants at this workshop were provided the same introduction to the presentation as the four other community workshops. Participants were then presented discussion scenarios for all four centres and provided the opportunity to discuss all centres.

SUMMARY

» Many in the youth workshop recognised that a certain level of density within the core is needed in centres to promote revitalisation. Many expressed that they would like cultural life in the LGA to improve somewhat. Some older age group workshop participants also noted that they would like to see some expansion of the social opportunities in centres and that a trade-off of density could assist in revival of centres (mainly Turramurra).

» Many in the youth group noted that the design of apartments often did not promote the acceptability of change in the area. Improved design was also reflected in a number of other forums.

» In the youth focus group, there was a strong feeling that there needed to be a diverse range of housing options for families and young people, considering affordability factors. They did not specifically mention townhouses/villas as the most suitable option. Generally, most workshops supported a diversity of housing.

» Many participants in the youth workshop acknowledged that housing cost and lifestyle factors were a reason for younger people leaving the area.

» Some youth workshop participants desired a more focussed approach to development (apartment living close to the station) but others expressed a need for a diversity of housing and a more widespread approach.

» For the Lindfield area the youth group suggested there should be a mix of housing types with density at the station (Scenario 1 or 2).

» The youth group recognised that Gordon is in need of revitalisation and that there may need to be a trade-off in terms of height to get a better functioning centre.

» The Youth Workshop suggested that the Turramurra Hub was a good initiative with more compact scenarios preferred but maybe with some townhouses to offer diversity.

» The youth workshop nominated scenario 2 (a more townhouse focus) for St Ives as it provided the best mix of typologies and height not too great in the centre.

KEY COMMENTS ILLUSTRATING THEMES DISCUSSED BY WORKSHOP PARTICIPANTS

Below are the key themes raised by workshop participants and key common comments.

<u>What we've heard from youth in the LGA</u>

» Consider transport as development is inevitable, housing and transport should be done in parallel. Develop along train lines or major thoroughfares. If you are bringing more people in you need to consider that transport wise. Align with transport improvement. High and medium density need to be near transport.

» Families are seen to need a garden, big space and transport for work. Different families want different things e.g. some want a garden; others might think a garden is too much maintenance. A range of options is good and it makes sense financially.

» Revitalization and cultural improvement – there is likely a density factor in this.

» New development should fit in with the character of the area.

» Keep development in fitting with the character of the area. For example, the Asquith area has dramatically changed and I don't want this to happen in Ku-ring-gai. Be sympathetic to the style.

» Infrastructure has to be put in place before you put in higher density, otherwise you reach a breaking point where there is no more housing or no more affordable housing. Full capacity is then reached and rash decisions are made, planning needs to happen early in order to create better and more blended communities.

» Apartments are important to have in the mix for affordability.

» Don't necessarily need bars and restaurants, things for young people to do, it is a more chilled and peaceful area. You can't turn Lindfield into a bunch of bars and clubs.

» Need to consider retaining young people and how to attract young people compared to other suburbs.

» Housing is only one part of what makes you live where you live, transport, infrastructure schools and a sense of place. There needs to be wider discussion about what it's actually like to live in a place, the bigger picture of liveability.

» Concerned about infrastructure, if there is a big load of apartments, parking, overcrowding of trains, need to increase services.

» Plan for green spaces, and provide for people who are in apartments.

» West Pymble and shops as we want more young people in this area. We need a better sense of community and culture, for example, the Greengate Hotel is too far and the IGA needs overhaul. Consider lives outside of the area.

» House prices are too expensive for young families, we need access to more townhouse and bus stops and more community centres. A participant's family lives in Gordon but this is too expensive to live there unless you buy an apartment. The housing market is a challenge for young families. Gordon is great for access to transport. It is important to balance enough housing with transport links.

» Need to be considerate of heritage and leafiness in the area. The participant moved to the area from Brisbane. Ku-ring-gai's beauty is part of appeal to live here and it needs to be retained. The participant agrees with the need for an upgrade of West Pymble shops.

» Turramurra – transport and infrastructure card. The participant lives with their parents. It is hard for those not driving to access transport. The size of suburbs makes it difficult with accessing buses and the participant has to plan ahead a lot for transportation.

» Retiring to a smaller home and garden rather than a retirement home is a preference for his family. Apartments with a courtyard or granny flats are a compromise for retirement. The participant wants to see more smaller properties with gardens for the older population.

» One participant has lived in Killara for 20 years. Green, tree canopies and fresh air is part of Ku-ring-gai. Key point is to balance protecting canopies with housing targets, keep as much as possible.

» We need to enough apartments to meet the quota but it needs to be balanced with the character of the area. Trees are important to character and we moved here for it. We need to ensure we having enough trees and maintain greenery.

» Infrastructure is important for any demographic variation. The participant thinks it's not satisfactory that trains skip stopping at Killara for example the train timetable has two consecutive trains skip Killara. The participant thinks free parking incentivises the use of public transport. The participant has to pay for parking at Killara or get fined. Killara is a large suburb and you can't walk to station from south Killara, it is an hour walk. Cherrybrook has 4-storey free carpark – wants that in Killara.

» Transport and infrastructure, the participant advised of their recent experience at losing electricity two times in the last two weeks. Is there an issue with supply? Does infrastructure need to be improved before new people come? Perhaps underground wiring should be considered.

» One participant lives in St Ives with parents to save money. Sees property market as very unaffordable. Renting is just paying a landlord. He thinks there needs to be a mix of different types of accommodation at affordable prices. People should still be able to live in houses and we need more townhouses. We can't knock down everything and replace with high density. Roads need to be upgraded to cope with higher density e.g. Mascot. Issue of congestion. Council to look at housing accommodation – look at cheap rentals to public that aren't owned privately (perhaps they could be owned by government). The housing market here is getting out of reach for younger generation. We need to improve rental conditions and affordability. Thinks fixing housing affordability could help the economy as people have more to spend on other things.

- House price too expensive
- Townhouse – to shops
- Community sense
- Want to live in area as want town house with grass but townhouse
- Access to transport – train and bus and improve transport for rail
- Leafiness and heritage – appeal – and beautiful – protect it and attracts family
- Bus doesn't come often enough
- Parents want to stay but house large – so if more smaller properties and gardens is good or let older people move out larger house to smaller
- Maintain green and tree canopy and appropriate housing
- Enough apartments that are planned but enough houses to maintain green
- Trains shouldn't skip Killara and free parking incentives use of public transport and improved bus service to train and get commuter car parking
- Infrastructure capacity and need to increase electricity supply before more housing
- Unaffordable and not many options and therefore mix of different types of affordable prices, but still houses as keep character and still need as roads can't cater for traffic balance of housing options/rental
- Impact on transport

Demographics and housing data

- Subdivision would help with affordability, as the lots and houses wouldn't be that big
- What is considered medium density housing – town house and villas, can also be low scale apartments.
- Not a bad thing that Ku-ring-gai is different age structure wise
- Ask about why there is that dip in demographic over young adults – it is because of affordability. Youth move out of area because they can't afford it. Those remaining stay at home with families.
- Jobs, cost, lifestyle, (but mainly cost) this is why there is a dip in young adults
- Apartments being bought by investors becomes transient, there is no one there, no incentive to invest in community
- Difference in cost in owning a house compared to an apartment, ownership factor in apartments is quite high

Capacity Analysis

- The participant is living in Gordon where there are many apartments, is there the possibility of looking at areas for development away from train station and installing significant bus access to support it. Some people don't have to be on a train line and a bus could work like if you are going to Macquarie or the city. A better mix of housing could work better than transport as it depends where people are going.
- Why is St Ives in the mix? It was noted that it might undergo change depending on mass transit delivery
- Will it go to Secondary Centres when there is no space left?
- Road infrastructure and increasing homes needs to be considered
- There is congestion on main roads, so how can St Ives be put in the mix with bus transport if there is already congestion
- Will businesses be considered in the housing strategy? Yes, aims would be to maximize commercial on lower floors then residential above.

- Question: Does townhouse development need more roads. Answer: no, but water and sewer infrastructure needs to be considered.
- Question: do townhouse models include garages or street parking? Answer: Parking is a consideration and it is built into the process; it is not assumed street parking.

Lindfield Scenarios

- There needs to be assistance for fixing current problems
- We need a mix of both
- Appropriate usage of land however if we have high-rise it will cast shadow.
- Development needs to keep with the character of the area
- Revitalisation of centres and can trade off for that
- What kind of people are moving in? What's the motivation? A lot of people want green space and they might not want development near station, others might want it near station to be able to get into the city.
- Being close to the station is good.
- Services need to be available in centres, particularly if you have higher population. For example, Lindfield library is dilapidated and old.
- More medical care, transport, respite and transient care, emotional/community support.
- Grocery shopping, is there enough for when the population increases.
- The highway is a gigantic barrier, if you are building on both sides then you need better pedestrian access to cross (e.g. in the inner west there was tunnels under the train line) and east/west connections.
- There are dilapidated properties around Lindfield that are close to station, need to make better use of existing stock. Consider repurposing houses.
- "Sub-par" granny flats where living standards are low because of the quality of building.
- Is the design of apartments in consideration? For example, design a courtyard in middle with greenery. Tall buildings cast shadows and there will be issues with this.
- One participant stated that the community has a love of nature and greenery and some apartment designs would not work here to incorporate this. Apartment living might be more palatable if it is more sympathetic. There should be more townhouses or 3-4 storey apartments otherwise you would automatically lose the character of the area.
- Town houses are nice but too many over a large footprint can change the feel of an area
- Accessibility/walkability to public transport and shops for groceries and works and study and kids is important
- Lindfield – scenario 2- spread out housing – not always close to trains but transport consideration other than trains
- Shadows cast by tall building makes me not want to live nearby because of damp from lack of sun
- We should grow the suburbs surrounding the town centres. Like Lindfield West will need improved transport
- Preferred option 1 because of character of the area will be better maintained
- Townhouses small 2 block high apartments in other areas – new transport
- Design and buildings (high rise buildings) maintain ongoing character and upkeep
- There is an overflow in the area from Chatswood, people who are looking for a quieter lifestyle
- Consideration of aesthetic and "green" qualities of apartment buildings
- Pedestrian access dividing communities by major roads

- Ageing population doesn't necessarily use mass transit at peak times
- Trading off height for revitalization of aged properties
- Improved parking and traffic control
- Broader diversity of housing types – options for current land owners
- Any kind of high rise etc. must be within close proximity to station. Within a reasonable walking distance to a form of public transport.

Gordon Scenarios

- Option 1 spreading it out would be good for a young family. High-rise is not good with a pram you have to walk up all those storeys and you don't want to walk a pram on the highway. The participant would prefer a diversity of housing being offered.
- By putting high density in focussed locations then you are limiting the impact of change elsewhere, so then you can still enjoy the rest and keep the green. If you compact then it is easy to deal with, but if you end up changing everything at once that then becomes harder to fix/deal with.
- Chatswood is extreme of high density in the centre with low density on the outside and the inner west has all townhouses and this still protects the feel.
- Gordon needs revitalization and Roseville does too. High value lands will be the tipping point.
- Have two smaller centres with density close to station and village 5-10 minutes from station spread down the valley west, consideration of other centres.
- West Lindfield shops; Gordon north (no link); and West Pymble are purely residential and nothing there so put townhouses here.
- We want a bit of diversity near centres, revitalization in centres and trade-offs to get that and there should be consideration of other areas.
- There needs to be assistance for fixing current problems
- We need a mix of both
- It looks to be an appropriate usage of land, however, high-rise it will cast shadow.
- Development needs to keep with the character of the area
- Revitalisation of centres and can trade off for that
- For people needing public transport (e.g. young couples) apartments near station would be ideal
- Public transport in area (particularly buses) needs to improve. Consider routes that go to areas that of interest to demographic
- Apartment and town houses need to be designed with environment in mind – thoughtful design important e.g. include courtyard. Keep Ku-ring-gai spirit in apartments/townhouses
- Gordon bus stop should be used to correct parts of the suburb that are far away from station – West Pymble, West Killara, West Lindfield – this gives access to train line
- I'm looking to buy a house and am only looking in a 15-minute radius of Gordan Station
- Let's remove some heritage listings in Ku-ring-gai
- Inner glebe apartment/townhouse look quite good – would support this
- Agreed that tall 10+ storey apartments are not ideal – casting shadows, overcast skyline and suburb
- Granny flats will work!
- Shared zones – prams and reduced speed traffic
- If people wanting green space e.g. young families and older empty nesters. Need to consider environment and parks – so houses and townhouses may be more suitable – could be further from station

- Spreading out diversity of housing
- Lower-scale looks nice
- Not important to be near station if bus routes are improved
- Make unpopular areas (areas that are away from main hub) more appealing – put in parks for families, lifestyle options for older couples. An alternative to building only around station
- “west” parts of suburbs are being left out – Pymble, Lindfield, Killara, need help, would be good to get bus route to main station

<u>Turramurra Scenarios</u>

- Look at FSR and granny flat to allow it
- Not a big supporter of subdivision, too many owners divide homes
- Importance of commercial
- Transport: housing – micro centres
- Older houses shouldn’t be knocked down; it will be harder to maintain character as options cover a greater area
- It may or may not be more affordable
- Not much motivation to change unless owners get financial benefits
- Not opposed to the other secondary centres loading with housing but must be with transport
- Need commuter parking
- Plans to upgrade pacific highway is needed especially with new housing to address traffic issues
- Micro-infrastructure and contingencies for mass infrastructure failure – power, water, food systems – apartment buildings should have basic solar, water tanks, community garden space to be approved
- Broader – attached dwellings, townhouses, tower apartment
- Compact: mixed dwellings, apartments, high rise – 10-15 storey
- Design is important
- This can get more variety and more interest in retail and commercial (people can stay in area and not hotels as much)
- There’s no perfect option. Pros and cons to each.
- Not supportive of the broader pink option as it relies on current landholders to want to subdivide and change properties. Will this be the case, will they profit and is it feasible? Heritage and history of homes – don’t want to lose that.
- Businesses and business diversity is important, and shops that do well. People need to have everything they need in their local area so they don’t have to leave the suburb. This consideration would also provide different types of employment.
- Liked centres approach but what about the feasibility of other areas, or bring new transport to existing housing areas. Important to co-locate them, but don’t build houses on top of transport. We need to build new centres hand in hand with transport.
- Several participants raised the need to consider micro centres. Some centres are dense and overpopulated and we could do more to have additional smaller centres closer to where people live and work.
- Likes the breadth option, the middle option which is keeping it together and compact.

    But will the stations be more packed in the morning.

    There are currently underutilised shopping arcades and we need to redevelop some of it. Question about Turramurra hub and underground parking. Answer: planning is happening on this.

There is a need for specialty shops and interesting shops. Shops to bring people in, not with low turnover. Why are there strips of 3 real estate agencies?

We need to revitalize, add interest and variety, we don't need three real estates.

St Ives Scenarios

- There is an overall need for some public housing and we need to think about this aspect
- Not going with too many apartments and instead a greater mix
- Need to understand the motivation of people moving in – green space, proximity to transport, local shops, sense of community, parks
- Young people and living with parents - consideration of walkability could revitalize neighborhood centres (micro-centres)
- Apartments above shops mixed use is good for older people
- Looking at parking in the centre
- Not a fan of really large apartments as they don't fit in area
- Encourage KEO Ride app for transport
- Maybe add some attached dwellings, manor home into mix
- Maintaining style and a better use of existing stock
- Culture of community and a better sense of culture and community is required, West Pymble needs a huge overhaul
- Wondering how strata and title issues will be resolved. Suggest to drop down apartments (height or quantity?).
- There could be an issue of new dwelling types sticking out from the existing area. How can density be introduced in a way that doesn't disrupt what's there.
- Favouring middle scenarios with not too many apartments.
- Need to consider who would develop under these scenario models. Could private or Council take the initiative and build affordable housing. The workshop noted that a lot of development would be market-driven.
- Suggest the scenario needs more of a mix to ensure affordability. Need to think about affordability when granting approvals to private developers. We need to establish a level playing field.
- Increase the supply of affordable housing and this might help affordability in the housing market. More height for apartments equates to an increased potential for more affordable dwellings. Townhouses should still be in the affordable housing mix – but with smaller blocks etc. Discussion of granny flats and built-upon ratio as important and we need to balance the two options.
- Not a big fan of really large apartments. St Ives has changed a lot already they mentioned. Higher density is already happening. There needs to be an emphasis on a greater mix of dwelling types and demographics. This will make it more accessible for young people.
- Mention of how big the suburb of St Ives is. Need to think beyond the centres because it is a large suburb.
- Revitalizing – bars etc. Revitalize neighbourhood centres – not sure how but this needs to be done. For example, rooftop bars.
- Also balance priorities with schools, so there are enough classrooms etc. – to accommodate new populations. Raised the issue of apartments and set energy providers, there is a need for choice.
- Limitations of breadth because St Ives is along Mona Vale Road. There was an acknowledgement for the need for height. Townhouses should be more set-back from the main road for amenity, lifestyle and away from noise and traffic. Apartments can be on the main road with high rise on the highway. Expand outwards

but keep look and feel of suburb and put more parking underground to keep the character of the area. There is a need for buses, but will people still need to drive to the bus stops. How do you manage congestion is a good question. Need to let the public know of “Keo-ride” type bus service through good marketing.

» Scenario 2 chosen. Better mix of apartments, townhouse, attached and mixed use.

» Felt that the development locations on the map could be amended. Suggested apartments along main roads and it would be easier for cars to get onto main roads and reduce congestion on surrounding streets. Set back townhouses away from major roads, reduces noise and improves liveability and lifestyle.

» Looked at scenario 1 with manor houses, overlaying it with option 2. This appears to cater for all different types of dwelling, adds in extra diversity and built-in capability for future development by landholders of large properties and manor houses.

» Supports apartments on top of mixed-use dwellings. On top of shopping centres could cater for older communities as they don’t have to go too far.

» Not very keen on Scenario 3 as 10-15 storeys would destroy identity in the area. Don’t want St Ives to become like Macquarie Park. Think we shouldn’t go over 4 stories in St Ives.

<u>Principles for Council to consider when developing a housing strategy</u>
The workshop participants came up with principles for Council to consider to guide the housing strategy.

» Breadth versus tallness

» Housing typologies

» Locational

» Housing mix/need

» Other areas

» Housing need

Workshop 6 – youth participants

7 Councillor Workshops

Throughout the community consultation and engagement process, three Councillor workshops were held to keep them up-to-date on key findings as the program progressed, gain feedback and outline the next steps in consultation.

A summary of the content that was covered in the three workshops is provided below.

Councillor Workshop 1

Key discussions included:

- The elements of the consultation program and timing
- The need for a Housing Strategy
- Some key demographic forecasts that needed exploration in the engagement program and how that was being achieved
- Preliminary findings of the community survey
- Feedback from Councillors.

Councillor Workshop 2

The second Councillor workshop was focussed on:

- The key outcomes of community consultation and engagement to date
- The key outcomes of demographic/housing analysis
- How the above has informed the last round of consultation at community workshops
- Feedback from Councillors.

Councillor Workshop 3

The final workshop with Councillors was:

- A summary of the overall communications and engagement campaign
- Discussion about the key issues that emerged and
- The next steps in delivering a draft Housing Strategy.

8 Stakeholder engagement

Overview

- Elton Consulting conducted two rounds of stakeholder telephone interviews.
- *Round 1 (2019)* consisted of three stakeholder telephone interviews. Key themes included:
  - aged care providers are increasingly investigating providing onsite worker accommodation to create efficiencies in service delivery, and ensure staff can travel safely and efficiently due to the high cost of housing in the area
  - easy access (particularly walkability) between aged care and local services and town centres, is key
  - financial stress is an increasing (although still largely hidden) issue for older residents
  - there are a number of land use planning issues creating barriers to delivering seniors living developments of all types.
- *Round 2 (February 2020)* consisted of seven more stakeholder interviews. This included government agencies and professionals working in or affected by the housing sector in the LGA. Attempts were made to interview a key health provider but were unsuccessful.
- Several developers and architects commented that redevelopment of centres was not feasible under current planning controls. They noted that the land with the centres needs to be 'unlocked' by feasible planning controls.
- In interviews with aged care and retirement village providers/Seniors Living architects the following themes emerged:
  - older retirees were increasingly interested in residing near centres
  - it is important to keep the integrity of SEPP Seniors so that housing need can be met
  - there are increasing constraints to developing co-located aged care and retirement living which is generally the preferred model. However, it is extremely difficult to find sites that are large enough to achieve this due to planning constraints and competition with other types of residential development
  - improvements in Lindfield appear to have generated a lot more walking and activity among older residents and this was key to independence. Exploring the benefits of the hub model for older people should be undertaken. As in-home aged care services become increasingly constrained, the hub model could provide an alternative.
- A local real estate agent confirmed that older residents were looking for alternate intermediary housing such as townhouses.
- Making better use of existing landholdings (attached redevelopment) could also be another way to increase the level of housing provision without drastically changing the character of the Ku-ring-gai LGA.
- The real estate agent confirmed that apartment development has attracted some younger adults to the area and this was good for diversity.
- A school representative stated there was a need to ensure that there was a diversity of housing (not just detached dwellings) to support families' changing circumstances given the importance of the education industry sector in the LGA.
- Many schools were at capacity and that congestion around schools was increasing.

For confidentiality reasons, we have not indicated the names of the organisations that provided information to inform the draft Housing Strategy.

8.1 Aged care provider interview

This is a key aged-care provider, home-care and retirement village operator. Key outcomes of the interview are noted below.

» Protect the integrity of the Seniors Living SEPP – it is an important element in the housing mix to support the ageing population.

» Consider identifying land close to but not right in centres and consider special permitted uses where there are suitably sized blocks and other compatibility factors – demand is increasing from the ageing population to be near services.

» Home care is not the panacea – there needs to be other options.

» The length of time to achieve approvals is a key barrier.

» Consider provisions for on-site key worker housing.

» Accessible housing design is key to people remaining independent for longer.

» Finding staff is a significant issue – many people are travelling from South-west Sydney – Council should be investigating Affordable Housing. Aged care organisations are investigating on-site accommodation models that would need to be supported by councils.

» Housing stress is often "hidden but definitely there" in LGAs like Ku-ring-gai with women over 55 being one of the cohorts most significantly impacted.

Interview Notes

» Ku-ring-gai does have an ageing population but not the volume increase expected in some parts of the Sydney (e.g. parts of the South-west).

» Increasing distinction between seniors (75+) who are relatively independent and 85+ (frail and in need of much assistance) – the increasing proportion of the frail is a growing issue in Ku-ring-gai.

» Land use planning for Seniors Living – State Environmental Planning Policy (Housing for Seniors or People with a Disability) 2004 is very important to provide sites for seniors living. Some councils have sought to achieve exemption and have their own set of criteria (e.g. Northern Beaches Council). It is important that the integrity of the SEPP is being protected.

» A key barrier from a land use planning perspective is the length of time that it takes to get approved – usually 1 – 1.5 years. Too often proposals have to go through the Land and Environment Court after a Deemed Refusal and then often there is a Section 4.56 modification of the court consent.

» Finding sites that are compatible (as per the compatibility test in the SEPP – slope/gradients for access, access to services, public transport accessibility) is a challenge. Competition with other developers makes this virtually impossible if the land is zoned for other residential uses. It would be helpful if Council considered some lower density areas of town centres to remain lower order residential zoning but with an additional permitted use to enable seniors housing/residential care.

» The sweet spot is usually close to, but not right in, town centres as it is difficult to find adequate levels of open space the further into the centre it is. Ideally it will be on a main thoroughfare to the town centre. With an FSR of 1:1 the minimum site area is approximately 3ha. Generally, 100 units and co-located residential care facilities are required to make a site feasible.

» Other states are doing better in terms of innovative approaches (e.g. the vertical village) but outdoor space on many sites is a major issue. The vertical village concept at Aveo Bella Vista only had an occupancy rate of 25%. The long-term value of this model is being investigated by several aged-care providers.

- Usually people make the decision they are going to downsize early (around 60). Once people are 70+ years they generally stay in own homes.
- Demand is increasing for aged care providers near centres and services, not on the periphery of broader residential development. Seniors are demanding proximity to services.
- Accessible housing design is a key factor to enable people to stay independent.
- Home care is not the panacea for the ageing population. There is significant unmet demand for home care and it is increasingly difficult to find staff.
- Most staff come from significant distances (South-west Sydney). The aged care provider had to change the rostering of aged care workers (shifts starting/finishing at 11pm) because people were travelling such long distances. Getting to and from the train station was an issue when they had 165 staff working out of Gordon.
- Wages cannot match housing in areas such as Ku-ring-gai. Council may need to consider providers' ability to provide on-site housing for workers and Affordable Housing.
- The preferred model is co-located residential care and seniors living.
- The residential care profile is 60-70% diagnosed with dementia and 75% with either dementia or some sort of cognitive impairment as well as anxiety and depression.
- Housing stress is increasingly prevalent including in Ku-ring-gai – "it's hidden but it is definitely there" – and particularly impacts women over 55. On some sites, up to 25% of residential accommodation is classed as affordable at 30-35% of aged pension and there is significant demand.

8.2 Aged-care in-home service provider interview

The key outcomes of the interview are noted below.

- Investigate further how Lindfield redevelopment is operating for older people. Older people are using Lindfield and it appears that it is enabling people to remain active and independent. There is an opportunity to integrate services and key aged care worker accommodation in hubs. These are more efficient services and will attract good key workers to the aged care sector.
- Ageing-in-place works when there are the right circumstances (e.g. family support) but it is not for everyone. Many older people do not want "seniors living" but want to be integrated into the community.
- The organisation is starting to investigate how they can provide accommodation options for staff as housing costs are increasingly becoming a barrier to staff retention. Most of their workers come from the Seven Hills area.
- Financial and housing stress is a much greater problem than would be obviously apparent. Elder abuse is also becoming a significant problem (e.g. children will not let older people downsize for future financial gain or other issues).

Interview Notes

- Ageing in place to terminal can work well in the right circumstances – a relatively short palliative period and family support is where it works most positively but it may not be right for all people.
- For in-home care, $55,000 is the maximum available for services – 24 hr care is approximately $4,000/week.
- New models seem to be working better but there will be increasing pressure on these services and funding.
- Residential care has a high cost. Entry fees vary greatly with $350k-$400k in Terrey Hills and up to $1.5m in Mosman.
- Alternative housing to enable people to remain connected and independent should be explored. Some Councils are working against providing suitable dwellings – it is good to see that Ku-ring-gai is engaging on the issue.

- The hub idea has real potential. The Lindfield redevelopment is working very well for the older community – keeping people active is the best way to keep them independent. Walkability of where they live is key. It would be good if there was a study done on the way Lindfield is functioning for older people. Turramurra could do with a hub integrating services and affordable housing for aged care workers.
- There is potential to accommodate key aged care workers (affordable housing) and services in hubs to provide more efficient services for all around the area. It would be so much easier and enable retention of the right kind of staff.
- As an organisation, the aged care provider is starting to look into accommodation for their workforce – most people are coming from Seven Hills area, which may be increasingly unsustainable.
- Financial stress is impacting a lot of older people in Ku-ring-gai but this is often hidden (asset rich but cash poor). Often there are people hiding financial stress and there is often significant shame associated – they do not want to tell their children.
- Elder financial and emotional abuse is becoming an increasing problem – older people are pressured by their family not to downsize (keeping the family home asset intact). People living well beyond their insurances and annuities and the resulting need to release equity from homes is likely to increase.
- People downsize before 75 or they stay.
- People are no longer always wanting independent living – residential designed for older people.

8.3 Community Housing provider interview

This Community Housing provider is committed to the delivery of Affordable Housing and is one of the oldest not-for-profit Community Housing providers in NSW. Formed in 1984, they manage around 4,000 homes, providing safe and affordable housing to thousands in need. They have a strong presence in the north parts of Sydney.

Key outcomes of the discussion are noted below.

- Ku-ring-gai has one of the lowest provisions of Social and Affordable Housing (one of the top 5 LGAs).
- There is a need for a program and commitment to delivery of Affordable Housing.
- The number of people likely eligible for Affordable Housing outlined in the Housing Needs Study is reasonable but is possibly higher.
- Women over 55 are one of the cohorts at significant housing risk.
- There is a need to leverage low cost land (e.g. Council-owned) – joint-venture arrangements are critical.
- A diversity of housing tenures is important to enable key services to be provided to the local community e.g. aged care.

Interview Notes

Discussion about numbers likely eligible for Affordable Housing in the LGA

- Between 4,000-8,000 people eligible for Affordable Housing sounds fairly accurate if not higher.
- Ageing women (over 55) are a cohort that are increasingly experiencing acute housing stress, including in higher-priced locations like Ku-ring-gai.
- Agree that as owned-outright tenure types might skew the number of people in housing stress (i.e. housing cost cannot be compared to household income), that there might be considerably more financial stress in the LGA than housing stress numbers indicate.
- Ku-ring-gai LGA has one of the lowest provisions of Social Housing or Affordable Housing (probably one of the top 5 LGAs in terms of lack of provision) and therefore, there is very little in terms of 'safety net' in the LGA.

- Diversity of housing and tenure types is critical to functioning communities in terms of providing key services, particularly in locations that have very high housing cost.

Discussion about the feasibility of delivery of Affordable Housing

The interviewer outlined that there are very high land values in Ku-ring-gai and factors such as the need to amalgamate land in centres reduces feasibility. It was outlined that the scale of development in Ku-ring-gai required to redevelop some of the centres was significant, even without the added factor of Affordable Housing.

Key outcomes of the discussion with the Community Housing provider are outlined below.

- Other LGAs with high land values (e.g. North Sydney) have made serious commitments to Affordable Housing and that this was critical. Land cost is a challenge for many LGAs.
- The use of Council-owned land resources and joint-venture arrangements was highlighted as a key requirement and that a clear commitment and program of delivery was required including Affordable Housing Policies and programs.
- 10-15% outlined under the District Plans should be considered the minimum in new development.
- Maximising the development of independent living for the ageing population was essential to ensure multiple tenure types.

The interviewer noted that some LGAs with very high land prices have outlined the potential to transfer Affordable Housing contributions to other neighbouring LGAs to maximise delivery of Affordable Housing and asked his views on this.

The Community Housing provider's comments were:

- they would take a pragmatic approach to this type of arrangement if the delivery of Affordable Housing was maximised as a result, but suggested it was not preferable – the diversity of people residing in LGAs were also important factors
- to maximise delivery, the best options to identify land at significant discount should be explored. This includes mixed tenure models to subsidise Affordable Housing development.

Other options to deliver Affordable Housing

The interviewer asked if there were various other types of models that the community housing provider had been looking at, other than the provision in renewed centres.

The Community Housing provider's comment was:

- there has been exploration in other LGAs, for example, a project where a large property (formerly a large house then used as an aged care facility) was re-purposed to provide six Affordable Housing dwellings. The project only used the property for a limited amount of time, but this may be an option for some provision of Affordable Housing in Ku-ring-gai.

8.4 TfNSW Interview

Key outcomes of the interview are noted below.

- Make it very clear that housing development and staging should be dependent on infrastructure improvements
    - GSC and other agencies support aligning housing with infrastructure as a key dependency
    - Suggest housing delivery ranges – if this happens: x number of dwellings, if not: y number of dwellings.
- There has to be a process of "inconveniencing the car."
- Integrating freight delivery into developments.

» Further development at St Ives is dependent on mass transit provision and staging of the Housing Strategy should be aligned with this.

» Development at other centres is dependent on increased capacity on the North Shore line post second line to CBD and staging of the Housing Strategy should be aligned with this.

» Assess capacity improvements on Pacific Highway post North Connex and align staging of the Housing Strategy with this.

» Support dependencies of interconnecting services (on-demand etc.) to relieve congestion in centres.

» Recognise that other attractors may be appropriate for increased housing, such as schools

  Support nominating interconnecting services (e.g. shuttle services to key transit nodes) if that is a direction taken.

» Support inclusion of solutions to traffic to and from schools.

Interview Notes

Out-of-centre development

The interviewer outlined community consultation feedback nominating other areas, not just centres, such as some neighbourhood centres and areas around schools (Gordon nominated West Pymble neighbourhood centre, St Ives/Turramurra workshops nominated around schools, North St Ives and Turramurra). The interviewer also outlined community concerns about the traffic congestion already around centres.

» TfNSW recognised that it is not just centres that are key attractors in Ku-ring-gai (e.g. schools are sometimes remote from centres) and that increased housing might be required in these locations.

» Outlined cluster work being undertaken by Schools Infrastructure (primary schools up to 1,000 students). Different approaches to getting students in and out of schools are needed – this is an increasing challenge everywhere. TfNSW supports mechanisms that reduce private car use for this purpose.

» The evidence is clear on health benefits of walking to locations, but needs to be communicated.

» Trials of on-demand services and others have worked with varying success but in the right locations the service does work well.

» Traffic associated with school drop off may also be resolved by similar methods, but this needs to be perceived by parents to be safe.

» Increasing recognition in TfNSW that there needs to be appropriate road and/or bus transport for the function i.e. connecting outskirts around centres to transport nodes.

» Recognise that on-demand or smaller bus typologies could provide a solution – make a dependency between investigation of those areas with alternative connecting transport (on-demand etc.).

» Recommend including alternative interconnectors in the Housing Strategy.

Discussion regarding North Connex

» No reporting identified that outlines any specific decrease in numbers on the Pacific Highway.

» North Connex will reduce trucks on the Pacific Highway, but some cannot use tunnels (e.g. dangerous goods) – this is being reviewed with improvements in technology and safety.

» Pacific Highway capacity studies should be undertaken post North Connex opening and staging of the Housing Strategy should be planned accordingly.

Structure of centres discussion

» Strong support for removing the focus on centres from the Pacific Highway (e.g. planning for Turramurra).

» Accept this cannot be achieved for all centres (e.g. Gordon).

- Recognise that east-west connections are difficult considering barriers of both the train line and the Pacific Highway and that the solutions are not easy.
- Review Future Transport 2056 as there may be some longer-term actions on this.
- Support flexible parking in new development e.g. maximum rates instead of minimum, especially with the introduction of car share schemes etc.

8.5 Architect interview

This architectural firm has undertaken a number of projects in the Ku-ring-gai LGA.

Key outcomes of the interview are noted below.

- Suitable sites for apartments were becoming scarce.
- Delivering apartments in business zones is not feasible as sites are fragmented and amalgamation costs make it too expensive.
- Unit sizes tend to respond to market fluctuations – there has been movement towards larger apartments to cater for the downsizing market recently.
- The land in town centres needs to be unlocked – permissible building envelopes need to satisfy lenders criteria and FSR bonuses are needed to encourage amalgamation.

Interview Notes

The interviewer asked about the demand for various typologies in Ku-ring-gai.

The following points were made:

- demand for apartments fluctuates with the economic climate – there is greater demand for smaller apartments following recession
- demand for larger apartments initially, a recent project replaced 4 homes with 30 apartments
- unit sizes were reduced in response to a growing investor market e.g. Chinese investors then there were restrictions on overseas investment in properties
- demand for larger apartments is growing in response to downsizer demands (e.g. 55 Lindfield Ave, designed about a year ago, initially 80 units which then had some units combined to respond to downsizer market)
- there has been a rollercoaster over the past 15 years in terms of apartment size demand
- there are some concerns that there is an oversupply of apartments in the market
- larger developable sites are drying up, so work in KMC has reduced
- apartment delivery is difficult in Business zones and therefore the bulk of work is done in Residential zones. There is a disconnect in Apartment Design Guide between Residential zones and Business zones. The Guide seeks apartment buildings in garden settings and doesn't respond well to multi-unit dwellings in Business zones
- lots in Ku-ring-gai are fragmented, with limited floor-space being available to amalgamate sites. There are challenges for smaller site feasibility and those that need to be amalgamated
- lending criteria makes feasibility difficult – land costs can only be between one-third and one-quarter of the project costs. This is often difficult to achieve in Ku-ring-gai

Issues/constraints in working in the Ku-ring-gai LGA were identified in the interview and are outlined below.

- In regards to heritage, Council officers and documents need a better understanding of the constraints around building adjacent to heritage items. Controls need more appropriate setbacks between new developments and heritage items.
- Water courses – generally, zoned land is located on the crest of a hill. The water courses are pristine on top of these hills, with large setbacks that constrain development. The water runs down the hill and is eventually piped under houses. More accurate mapping is required to better inform prospective buyers.
- Accessible units – Council needs to survey existing buildings to understand the take up of accessible units. There is a high requirement in buildings, but it is not clear whether units are converted into accessible units and whether they being used by right demographic.
- Enliven Business zones – careful thought needs to be given to location of commercial uses in mixed use development. Too many commercial units are empty, especially those that extend too far into a site. Uses on corners and towards rear of blocks may need to be residential in future.

8.6 Real estate agent interview

This real estate agency specialises in the Ku-ring-gai area.

Key outcomes of interview are noted below.

- There is significant market interest in townhouse options from older people – an easy-care downsizing option – there are plenty of units at this stage but other types of downsizing housing are hard to find.
- SEPP Seniors has a place but there are often concerns from financial advisors and family about the nature of the title.
- There needs to be zoning alternatives for housing types that are not being provided. For example, there would be significant interest in dual occupancy and attached development for both existing dwellings and redevelopment. Something like the old SEPP 54 would assist to address this but it needs to be well controlled to maintain the character of the area, which is a key attractor.
- There is opportunity to allow larger secondary dwellings giving families flexibility to accommodate multi-generations or older people staying where they are or to provide a rental opportunity.
- Younger people are interested in the apartments in Ku-ring-gai and greater diversity has been good for the local area.
- Some of the controls in centres are very low and redevelopment is just not feasible which is creating dysfunctional centres. Amalgamations in the Business zones are highly problematic and a response is needed to get the centres working.
- Need the high street model in the town centres and some density in the core to support it – when there are food/bars etc. in Ku-ring-gai patronage is very good and mainly older people e.g. Kiplings in Turramurra.
- There might be some further opportunities for families around schools and neighbourhood centres.

Interview Notes

- People are looking for easy care options as they get older, particularly one-level options.
- SEPP Seniors Living – the title is problematic for many people with financial advisors often against it and family.
- There is a need for a zoning alternative to deliver housing that is not being met currently.
- Making it easier to do infill type development would be a good approach, allow:
    - larger secondary dwellings – they are currently too limited in size for people to consider
    - subdivision without compromise to title (i.e. converting homes or lots for more than one dwelling)
    - provisions like the old SEPP 54 but in a controlled manner to keep the character of the area.

- The days are numbered for the large lots with a single house. There just needs to be smart ways to deal with it.
- Townhouses have a feasibility problem considering the numbers that are generated and the risks attached, but they do attract a premium.
- The key problem with a secondary dwelling is you can't separate the title and therefore there needs to be space for other options.
- Younger people are more attracted to the area with the increase in apartment stock and this has been good for the area. It is a great place to raise a family, but there needs to be the diversity of stock to further support this.
- Centres are dysfunctional and for years has not been able to be addressed – there has simply not been viability to change the commercial space. Amalgamations are a significant problem and there needs to be considerably more density to make it work.
- Centres need to follow a high street model – retail will not compete with the likes of Westfield. Delivery of more bars and eateries will be the primary opportunity.
- Some changes around schools and neighbourhood centres would make sense.
- There needs to be a broader and more diverse supply of housing to meet the needs of the community, but change is not easy in Ku-ring-gai.

8.7 Architect interview 2

This architectural firm does a significant amount of work in Ku-ring-gai including apartment development, townhouse development and seniors living in the LGA.

Key outcomes of the interview are were:

- apartment living might provide a better outcome for the ageing population as townhouse feasibility and controls often did not produce the desirable product
- was supportive of the biodiversity controls that are much stricter than other LGAs to maintain the green character of the location
- the apartment downsizer market in Ku-ring-gai demands larger product than standard and a quality build
- centres are often dysfunctional and will require substantial uplift to renew them and achieve good quality urban design.

Interview Notes

- Supportive of some of the key objectives of planning controls such as maintaining a good proportion of non-developable area to maintain green character – the high landscape area controls assist to create a unique environment. Does not mind the environmental constraints and finds the biodiversity mapping and strictness of floorspace controls appropriate.
- Ku-ring-gai is a unique market in that it is relatively affordable when considering the desirability of the location. It is a low risk LGA for developers and there is no risk of oversupply.
- It is a sophisticated market that demands a quality build – reputation is important in Ku-ring-gai.
- Townhouses with underground parking costs around $800k to develop - St Ives and some locations around Turramurra work in terms of feasibility but in many areas, it is unlikely to be viable.
- The market demands over-sized apartments for downsizers – much larger than standard apartment sizes in Sydney (SEPP65) - usually 3 bedrooms and up to 180sqm.

- Apartments generally provide a better option for the downsizer market – there are feasibility issues with townhouses that means the product is not ideal as the configuration of townhouses is generally not what people are looking for.
- The requirement for 3 hours of solar access in principal living area often skews townhouse design and does not produce optimal outcomes.
- Many centres are dysfunctional e.g. Turramurra. Current planning controls not feasible and is concerned that new planning controls will not be either. It would require substantial uplift to deliver great urban design.
- There are some good examples of zero lot housing emerging e.g. Norwest that should be considered and would suit some areas quite well.
- Agrees with older heritage areas having a low FSR to protect the integrity of them but also suggests there are some areas within Ku-ring-gai that have development that is not cohesive and should be renewed.
- There needs to be protection of any remaining employment land in Ku-ring-gai.

8.8 School interview

Key outcomes of the interview are noted below.

- There is a need for diverse housing in the community to ensure that there are options available to families as circumstances change (e.g. job loss or family breakdown).
- More diverse housing might be considered around schools to accommodate more families, but many schools in Ku-ring-gai are at capacity. There are options at other schools to increase capacity, but the interviewees school is more constrained than most being in a Heritage Conservation Area and how the school initially developed.
- Congestion around schools and conflict within neighbourhoods is an increasing problem as is the movement of school children to the train station. There may need to be alternative transport arrangements to facilitate the flow of students, in a manner that parents are comfortable with.
- For this school, it was difficult to get new methods for facilitating the efficient movement of students due to heritage and neighbourhood concerns.

Interview Notes

- Many families are impacted by change of circumstances such as a loss of jobs, divorce, but this happens infrequently in the interviewees school – most of our families can ride out loss of a job, but many can't.
- It is essential with family breakdown that parents are able to stay relatively close to one another e.g. one parent moves to an apartment or similar close by.
- Schools in Ku-ring-gai are at capacity and are very popular both private and public. Most schools can better use land resources to get extra capacity but the interviewees school is more constrained due to being in a Heritage Conservation Area.
- There may be some opportunity to increase the diversity of housing around some schools in the LGA, but capacity issues do need to be addressed.
- There is considerable traffic congestion and the movement in and out of the interviewees school is increasingly a problem. Many students come from a long distance and on multiple bus routes. It is difficult to have a "kiss and drop" due to being in a Heritage Conservation Area.
- More efficient movement will need to be explored. For example, shuttles to the station. This could potentially have a dual purpose – getting people to work and students to school.
- Young people aspire to live in the area and the right housing to enable that is needed. There is a bit of conflict between what people grew up in and their future expectations to be able to live in Ku-ring-gai.

8.9 Architect interview 3

This architectural firm has worked extensively in the Ku-ring-gai LGA, particularly in the SEPP Seniors space. Key outcomes of the interview are noted below.

- The market definitely wants the single storey villas with small garden but this problematic in terms of feasibility.
- Achieving the deep soil/tree preservation makes it difficult for development feasibility.
- There is a definite market preference to being in walking distance to a centre, but not necessarily the big ones. There is still a conflict with this in terms of style of housing preferred and feasibility close to centres (land usage of single dwelling villas and gardens) compared to other forms.
- Some manage to get the formula right of proximity and style of dwelling e.g. Eastern Road.
- There may need to be some strategic identification of locations that are suitable close to the smaller centres.
- It is much easier to get things through surrounding Councils, but recognise that preserving trees is a key objective of Council.
- Complying with the SEPP not generally a problem, rather complying with the Ku-ring-gai Council requirements.
- It is a slow process for approval with more than 80-90% going through the Land and Environment Court (LEC).
- Controls in the R3 zone are not necessarily what the market wants (3-storey).

Interview Notes

- Ku-ring-gai has their own guidelines for SEPP Seniors which makes it difficult, acknowledging tree preservation is a key goal for Council.
- The Seniors Living market would prefer single level with garden. This does not work from a feasibility perspective, conversely two storey doesn’t suit the market either due to the stairs.
- It is a problem when people have come from large homes and now want something with a small garden – but the villa does not attract a premium considering the land cost/cost of development.
- It is a problem that they do not get much equity from downsizing to a townhouse type product.
- Ku-ring-gai’s own controls for R3 are not really want the local market wants.
- There is still a lot of land available based on accessibility, consideration should be given to releasing more.
- 40% landscaping makes it difficult to achieve feasibility.
- It is difficult to get approvals (80-90% go through to LEC) – this is generally because of the landscaped area. Community Title is easier to get through the approvals process. Other LGAs make it easier to deliver this type of housing.

8.10 Key business advocacy organisation interview

Key outcomes of the interview are noted below.

- Redevelopment of Lindfield (Harris Farm) was highly successful in revitalising Lindfield, even though it was strongly opposed in the beginning. The amount of people that have started shopping in the centre has been remarkable.
- In regards to appropriate planning controls promoting revitalisation of centres, it is not just increased density that drove business success, but a variety of factors.

- People living in the core of centres generally used those services more and have the social opportunities – this can be good for business.
- The lifestyle patterns of people that live in apartments in centres was quite different to the rest of Ku-ring-gai in that they ate out more and used local services, improving services for the broader community.
- Retail in Ku-ring-gai will be different to other types in surrounding LGAs (the high street model) as it will not compete with Westfield and other emerging retail trends.
- Core services such as medical services were strong attractors and this could be key to revitalising centres.
- Public transport usage, such as trains, has escalated significantly in recent years. Patronage has now risen to levels not expected until 2024. For this reason, encouraging development with the hierarchy of centres on the train line was a key opportunity.

9 Social media

Overview

- Four Facebook posts were placed on Council's main page, between 16 October and 8 November 2019.
- The posts aimed to raise awareness of the housing strategy and encourage people to complete the survey and forum questions.
- Altogether, the posts reached 16,233 people.
- Responses to the posts were managed by Council staff.

Screenshots of the four Facebook posts are included in **Appendix C** as well as a social media distribution report. Comments provided on the posts can be divided into a number of major themes:

Housing types

- More housing for over 55s is needed, in appropriate areas.
- Opposition to high density and units based on:
  - higher building densities putting a premium on floorspace, leading to increased house prices
  - impacts on the natural environment.

Green space

- The need to maintenance of green space rather than deliver more housing.

Survey questions

A number of people expressed dissatisfaction with the survey. Some of the specific comments provided were:

- Requests for questions on demographics (such as housing cost and number of members in a home). Although Council directed people to the online forum, it should also be noted that a lot of the questions requested are covered by the demographic analysis being undertaken for the strategy, which is occurring in parallel to the survey. This context was provided in engagement collateral.
- Questions are geared to people moving into the area not currently living in the area.

10 Key findings

There was a significant number of comments throughout the consultation process to inform the Ku-ring-gai Housing Strategy. The key findings have been summarised in this report and organised into key themes that have emerged from the consultation process to ensure readability. The following key themes emerged across engagement activities.

Key findings of community engagement

A strong desire for more diverse range of housing, and in particular townhouses/villas/terraces as the current supply of these housing types is limited. This type of dwelling was seen as highly desirable by older people

In open-ended responses in the community survey, townhouses/villas/terraces were cited as the most desired dwelling type. Many comments noted that the availability of this type of villa/townhouse was low. In community survey respondents over 56 years of age, townhouses/villas/terraces were the type of home that was nominated the most as to best suit future needs. It was also noted in a variety of workshops that this option should be available to downsizers and young families due to housing affordability concerns.

Ability of property owners to subdivide land and/or existing houses presents a unique opportunity to accommodate more people while maintaining Ku-ring-gai's character

Most consultation feedback stated that the concept of manor houses (those that essentially look like single dwellings that are either new or existing subdivided houses) were seen as a key opportunity in the LGA to maintain character, reduce maintenance burdens and increase housing supply.

The Community Sounding Board and most workshops expressed the need to make better use of existing housing stock or land resources. Subdivision or conversion of houses was a key feature of outcomes of one of the focus groups in Lindfield. Some open-ended responses in the community survey noted that the size of blocks in Ku-ring-gai was no longer suitable and that subdivision should be considered. This concept also emerged as a desirable housing option in most community workshops.

Some opposition to high density/apartments but others expressed it was appropriate in some locations

There was a position among a number of community engagement participants that Ku-ring-gai had delivered sufficient housing over the last ten years. 25% of survey respondents in open-ended questions specifically mentioned that there was already sufficient housing or there should be no additional housing/apartments. The participants in the workshops brought out reasoning behind people's views.

Opposition to increased housing was most strongly expressed in the workshop for Resident Action Groups held in February 2020 and the Focus Group that was held on 10 December 2019. Many participants suggested that housing targets had been met and that infrastructure studies conducted in 2000 suggested there was no more water, sewer and traffic capacity in Ku-ring-gai. A few of the other focus group and workshop participants echoed this view with some expressing concern over land values, if additional housing is delivered.

Community members in focus groups and workshops expressed that increasing the diversity of stock is essential and that targeted areas (such as rail stations and key infrastructure) could have high density living.

Other community members and stakeholders in workshops recognised there needed to be some increase in density in centres cores in order to revitalise the centres. A number of participants in workshops expressed that many centres were presently dysfunctional (mainly Turramurra and Gordon workshops) and needed renewal, activation and revitalisation to encourage social and cultural opportunities. It was therefore seen that high density may be the "trade off" may to achieve a revitalisation of the centres.

Most workshop and focus group participants recognised that revitalisation of centres was required. Most, however, did not accept that 10-15 storeys would be required in some centres, or in the case of Gordon, 20 storey development to achieve revitalisation.

Most workshop and focus group participants expressed concern that higher density will change the nature and character of the local area. Most participants did not want the Ku-ring-gai centres to be like Chatswood or St Leonards.

Younger community members expressed that higher density development must be done in parallel with transport improvements; with a range of the community specifically mentioning the need for car and bike commuter parking. Older participants at the workshops also echoed this view, but suggested alternate transport mechanisms, such as smaller shuttle buses.

Older community members identified the need for downsizing from their larger homes and properties, which is a driver to support a change in housing diversity.

Others expressed that if any increase in density is required, medium density in controlled areas is preferred. High density does not suit Ku-ring-gai's character.

Additional housing and any increases in density must be delivered in a way that protects Ku-ring-gai's character and heritage

People that supported there being some change in growth in housing, as well as those that were against it, felt that protecting Ku-ring-gai's green character, tree canopy, heritage and biodiversity was critical.

Delivery of additional green space and parks was noted by virtually all workshop participants as critical to provide amenity to residents, especially if there was to be additional housing. Increased green space should occur in concert with development.

There was concern in some workshops about the interface between the Heritage Conservation Areas and potential change with new housing adjoining them. This was particularly mentioned in regards to Lindfield and Gordon.

Some workshop participants questioned the heritage value of some shopping strips in centres such as Lindfield, and expressed the potential for revitalisation in some of these areas.

The residents action group FOKE noted that there was 'cherry picking' of some sites by developers and that expanding the breadth of development away from the centres may further reduce the take up of sites closer or within the core, further undermining the broader green character of the area.

Design considerations to suit the area

Improved design considerations to fit the local character was raised in a number of forums and workshops. Many in the youth group noted that the design of apartments often did not promote the acceptability of change in the area. The Community Sounding Board noted that there should be a Ku-ring-gai style developed, including the use of brick and trees.

Centres approach and infrastructure

In the community survey, access to public transport and shops was nominated as being important in terms of desirability of location, however transport accessibility was not as strong as the desire for typologies of housing. Accessibility to public transport was key among younger and older respondents.

Workshop participants expressed concerns of the ability for infrastructure to cope with increased housing in centres, noting that many centres were already highly congested, there was a lack of parking and generally there were poor east-west connections.

Many participants and survey respondents felt there was not the infrastructure to support additional housing, particularly traffic, open space and community facilities. Others felt that any additional housing must be accompanied by improved infrastructure and improvements to transport.

Workshop and Sounding Board participants (particularly Turramurra and St Ives) commented that there were also other key attractors, such as schools, particularly for families in the area. They felt that the approach to considering housing should be broadened to school locations and other areas.

A key comment from the workshop participants, particularly St Ives and Turramurra, was about interconnecting transport to key mass transit hubs. They felt that it was more important to be in close proximity to schools for their children, but with better access to mass transport through interconnecting services such as smaller mini-buses or ‘on-demand’ services. Improved bus operation was viewed as important to support any housing. Participants also expressed concern about school capacity.

Many workshop participants expressed that some of the neighbourhood centres could benefit (such as additional viability, patronage of the centres and activation) from some increase in housing surrounding them. Examples included West Pymble and North St Ives, which may also benefit from the delivery of a mass transit solution along Mona Vale Road. South Turramurra was also nominated as a key opportunity.

Housing affordability is a key concern for younger residents, older residents, young families and key workers requiring accommodation

In a variety of forums, many expressed the need for more affordable housing options and the ability to release equity tied up in larger homes. The lack of affordable accommodation forces key workers to either travel considerable distances to work or request on-site accommodation in work locations such as aged-care.

Mixed views about housing to support young adults residing in the LGA

There were mixed views in some community forums and workshops towards the fact that there is a very low proportion of young adults living in the LGA. Some expressed that it was a family area and this should not be changed. These people indicated that younger people could move closer to the city to enjoy a vibrant lifestyle. Others, as in the community survey respondents and workshop participants, expressed that housing to support younger people should be provided and that suitable housing typologies should be delivered. Many participants in the youth workshop acknowledged that housing cost and lifestyle factors were a reason for younger people leaving the area.

Some open-ended responses in the community survey and youth workshop participants noted that medium and high density, close to the station would assist to retain youth in the area. While others expressed a need for a diversity of housing and a more widespread approach to support youth residing in the area.

Geographical Centres Workshops

To facilitate discussion with the community in workshops, three indicative housing scenarios were developed for the centres of Lindfield, Gordon, Turramurra and St Ives. These were not Council-endorsed but simply to facilitate discussion about various housing options. In each case:

» **Scenario 1** provided a broader spread of potential change with areas around the cores of centres to provide manor houses (conversion of existing dwellings to provide housing for more than one household, attached dwellings and in some cases land subdivision). Centre cores would have more limited uplift but sufficient to promote revitalisation

» **Scenario 2** provides some further density in the cores and more limited areas of housing diversity surrounding the cores

» **Scenario 3** generally focuses change in the core of centres, with more limited housing surrounding the centre.

Lindfield

In the community workshop focussed on Lindfield, there was mixed views where some participants expressed a desire for a combination of Scenario 1 (attached/manor house over a broader area with lower scale in the core) and others preferred Scenario 2 (more of a townhouse focus). Others were in more in favour of Scenario 2 where the breadth of change is not as wide, but delivers diversity of housing through townhouses.

Overall workshop participants thought the focus within the centre defined area should be on townhouses, as well as repurposing existing dwellings. They felt that latter could address multi-generational housing needs and make better use of current housing stock while maintaining character.

The youth group suggested there should be a mix of housing types with density at the station (Scenario 1 or 2).

The Sounding Board preferred a mix of Scenario 1 and 2 with green space being a critical factor in any higher density development.

All expressed a need to improve east-west connections and improve the level of infrastructure within the core. Many expressed that the Lindfield Hub would improve infrastructure.

FOKE was of a different view and commented that the focus should be on the Council stopping developers 'cherry picking' sites within the Lindfield core. Broadening development options around the core may exacerbate this.

Gordon

There was preference for Scenario 1 or 2 in group discussions in the community workshop focussed on Gordon. This was due to most participants not wanting too many high-rise buildings in the centre (not like Chatswood).

There was a preference for a diversity of dwelling types to be delivered surrounding the core. If building of apartments is to occur some mentioned a preference for apartment buildings to be 10 storeys or less – and definitely not 20 storeys. The Sounding Board concurred with the storey height limit. There were specific comments from participants who did not believe that 20 storeys would be required to make redevelopment economically feasible.

While the Resident Action Group workshop was generally against additional dwellings being provided, some recognised that Gordon was a focal point in the LGA.

The opportunity for the Pacific Highway to go underground to improve amenity in places, like Gordon, was raised at the workshop and the Sounding Board.

Some resident action groups acknowledged that there was a need to revitalise the shops however negotiations on the height of the development should occur carefully so to balance revitalisation whilst retaining good designed apartments. It was acknowledged that this may require compromises on both council and developer sides in order to ensure public benefits.

Ensuring that housing design can blend with interface areas was considered critical by the Sounding Board.

A lack of open space was generally noted by all participants in all workshops and this should be a key goal in any redevelopment within Gordon.

The youth group recognised that Gordon is in need of revitalisation and that there may need to be a trade-off in terms of height to get a better functioning centre.

Turramurra

In the community workshop focussed on Turramurra, workshop participants suggested that other areas should be considered for housing growth that have not been identified at the workshop (such as South Turramurra with improved interconnecting transport to the train station). Participants also commented that an option that should be considered for additional housing diversity was areas close to schools.

Many workshop participants and the Sounding Board acknowledged that Turramurra centre needs revitalisation and that a compromise with height was likely the only way to achieve it. There was support for the Turramurra hub project expressed by participants. The Sounding Board stated that good design outcomes should be a key consideration in housing diversity within the centre.

One resident who could not make the workshop said that he felt that development should focus on the core of the centre to provide the dual benefits of revitalisation and diversity of housing. Like this resident, some of the participants at the Turramurra-focussed workshop said they prefer to keep redevelopment to the core of Turramurra.

Other participants expressed a 'no more housing, no more people' perspective or that other parts of Turramurra should take its share. The Resident Action Group Workshop generally expressed that there was too much development and that Turramurra should retain its character as it is.

The Youth Workshop suggested that the Turramurra Hub was a good initiative with the more compact scenario preferred (Scenario 3), but should also consider the inclusion of some townhouses to offer diversity.

St Ives

In the community workshop focussed on St Ives, some participants did not like any scenario suggesting that St Ives was too constrained. Other participants suggested there may be an opportunity for mixed use development at the shops but that it should be of modest height (not ten storeys). There were diverging views within the focus and workshop groups.

In considering the scenarios, if growth had to occur when improved transport was developed, some participants were generally in favour of Scenario 1 but with modifications. There was comment that the transitions between some land uses was too severe (e.g. between 5-6 storey apartments to attached/manor house typologies). There was recognition among many participants that a diversity of housing was required to meet community needs.

There were some particular concerns about SEPP Seniors Living housing that dominated discussion in one workshop group, with one or two participants discussing the lack of amenity and dilution of character this form of housing creates.

Some participants at the workshop thought that other areas, like around Pymble Station, would be better suited to development with some housing. The comment was made that the shops were sub-standard in Pymble and that housing may assist improving the centre. They expressed that Pymble also required ‘downsizing’ housing options. They also thought there was other opportunities around schools and other centres that have not been considered in the approach to the Housing Strategy.

It was also expressed that other areas within the St Ives area should be considered, particularly around schools or on main roads, not just a focus on the centre.

The youth workshop nominated Scenario 2 (a more townhouse focus) for St Ives as it provided the best mix of typologies and the height not too great in the centre.

The Sounding Board nominated an alternative option, between Scenario 1 and 2, while acknowledging that transport is a key issue.

Community Sounding Board

The role of the sounding board was to allow council to test ideas and feedback. Some of the key issues that were identified by the Community Sounding Board based on the results of the survey and review of comments, provided an outline of what they identified to be the key issues or supporting outcomes from the workshops, including:

» The need for improved transport and infrastructure, as infrastructure provision has the ability to impact who could be attracted to the area. The attendees discussed that there is some tolerance for housing density, provided there is infrastructure to service it. Comments were made that infrastructure can help drive demographic change, not just respond to it.

» Desire for variety and choice for housing (for example, small townhouse with a small garden): there is a need for different forms of dwellings, which should be appropriately sized. New housing options should accommodate the changing circumstances of residents.

» Support emerged from the Community Sounding Board to consider renewal or subdivision of existing housing/subdivision options.

» There is recognised opposition to high density, however the view was that there could be support for density in clearly defined areas. The Sounding Board noted the importance of Council coming up with the correct ‘density formula’ in centres. It was further raised that Council has an opportunity to show leadership through development carried out on its own land holdings.

» Elderly residents fear having to leave the area as a result of the lack of suitable housing. It was commented that there is a desire for existing residents to be able to stay in the same area, and therefore, it was considered important that there be a mix of demographics accommodated (for example, multigenerational housing and townhouse typologies) in the council area.

- The group noted that the desire for the preservation of the trees and tree canopy should not be viewed as a stance against development. Rather, appropriate development with construction materials and design quality that can complement the tree canopy should be considered, with the desire for a Ku-ring-gai style. Examples of this character provided by the Sounding Board were the use of brick and trees around buildings.
- Heritage/character should be respected when planning within the LGA.
- Desire for increased social amenity (for example, dining opportunities) within the centres
- Desire for high quality housing and design
- The importance of key worker accommodation/affordability: participants discussed that the role of Council is ensuring housing affordability for key workers (and affordability more broadly), which is particularly important given the healthcare sector is the major employer within the LGA and aged care is an important community service
- Mixed views about housing to support young adults residing in the LGA.

Interviews with stakeholders

- A real estate agent interview confirmed that townhouse, terrace and other smaller housing products was in high demand in the LGA, particularly for older people looking for lower maintenance but with a small garden. The comment was also made during the interview that there could be an option for making better use of existing landholdings (attached dwellings, repurposing existing dwellings) as this could also be another way to increase the level of housing provision without drastically changing the character of the Ku-ring-gai LGA.
- The real estate agent commented that attached housing or subdivision of housing could be a viable solution to increase the level of housing stock in the LGA without substantially changing the nature and attractiveness of the local area, if done in a controlled way. It was also noted that more relaxed controls related to secondary dwellings could also provide a mechanism to increase housing supply (at present the size was too small to be an attractive option). People were looking to modernise their living arrangements.
- An architect who works in both the apartment and townhouse space expressed concern that there is low feasibility for townhouses. It was suggested that feasibility combined with some planning controls meant that it produced product that did not necessarily meet the desires or need of older cohorts.
- The architect outlined that over-sized apartments (as demanded by downsizers in Ku-ring-gai) often produced a better product.
- Stakeholder interviews on the key issue of density in centres revealed that the feasibility of redevelopment of centres was not possible under current planning controls. They noted that the land within the centres needs to be ‘unlocked’ by introducing more feasible planning controls.
- Substantial uplift in planning controls was required to make redevelopment in some business zones in centres viable (above the 10 – 15 storey mark). Many noted the amalgamation of sites was a key barrier to providing housing diversity and particularly due to land value thus uplift in planning controls was needed to address housing needs.
- In a stakeholder interview with TfNSW on centres, transport and key themes emerging from the community consultation were discussed. There was recognition of the congestion within centres and the need to find alternative “non-private-vehicle-based transport”. There is an acknowledgement within Transport for NSW that further work does need to be done on interconnecting transport (i.e. on-demand services and smaller buses) to increase efficiency of movement to the centres.

  There was an acknowledgement that east-west connections require improvement in centres.

  The Housing Strategy should be explicit about the transport improvement dependencies to trigger and enable development. Examples of this are:

    improvements in capacity as a result of the second Metro completion into the CBD, assessment of road capacity after the completion of North Connex in assessing development proposals that emerge from the Housing Strategy,

aligning any increased housing development in St Ives with a mass transit solution, and

the potential for alternative interconnecting services to improve the function of centres with the potential to interconnect with other key attractors such as schools, in addition to active transport initiatives.

» In an interview with a community housing provider, one of the key concerns is older women over 55 who are experiencing acute housing stress. Clear policy, partnerships and joint ventures provide the most successful pathways to deliver affordable housing.

» All interviews with aged care service providers indicated that there was much more financial stress in the ageing community than would appear.

» A key provider of aged care and retirement village product noted that older retirees were increasingly interested in residing near centres. They noted that housing stress among seniors is somewhat hidden (asset rich but cash poor) in LGAs like Ku-ring-gai, but was definitely there and likely increasing. It is important to keep the integrity of SEPP Seniors Housing so that housing needs for the aged can be met.

» There are increasing constraints to developing co-located aged care and retirement living which is generally the preferred model. However, it is extremely difficult for providers to find sites that are large enough to accommodate this retirement living and they can compete with other types of residential development.

» In an interview with a Seniors Living architect is was noted that some of the smaller centres provided the best opportunity for access to services, but the right type of landholdings to deliver more affordable product was a constraint. It was noted that deep soil/tree preservation controls often made it difficult to make seniors living development viable.

» One aged care service provider noted that the improvements in Lindfield had generated a lot more walking activity among older residents and this was key to maintaining independence. Exploring the benefits of a hub model for older people could be a key opportunity.

Appendices

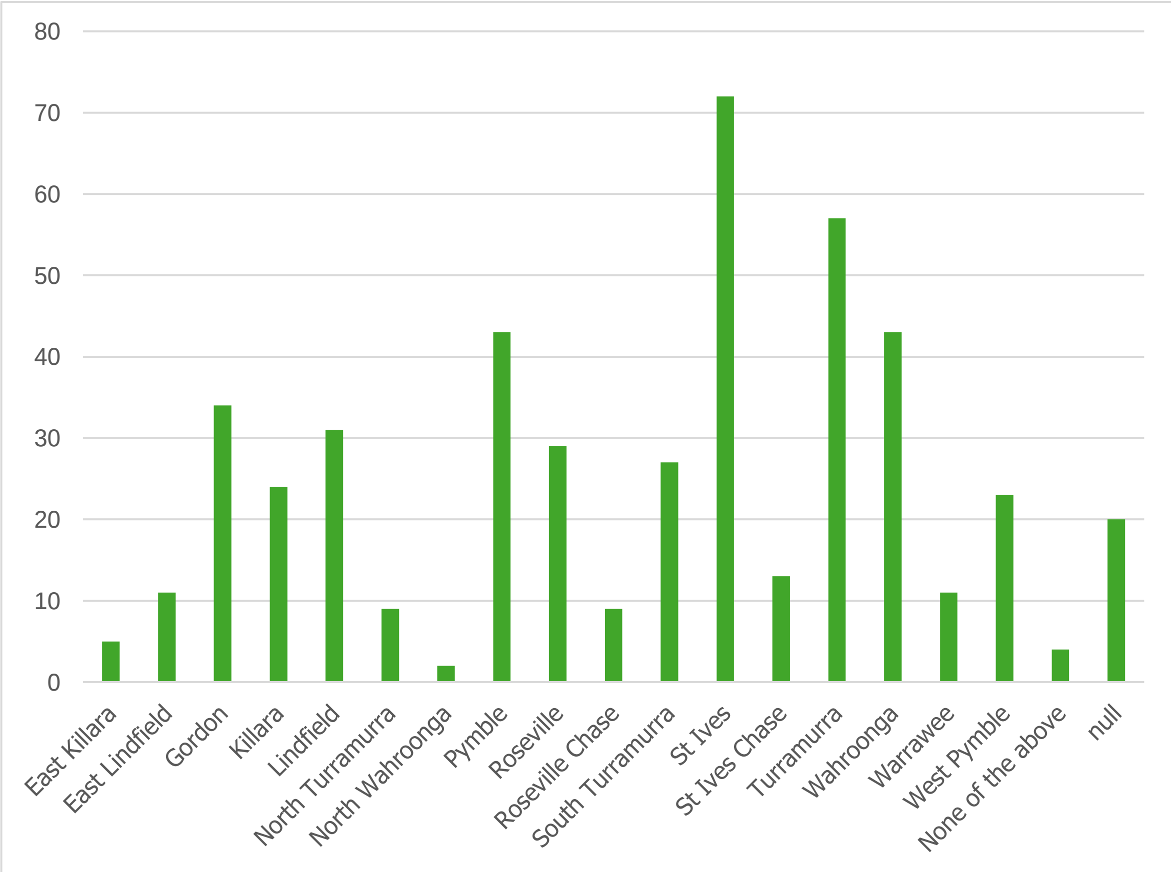
A Survey participant profile

B Community Sounding Board meeting notes

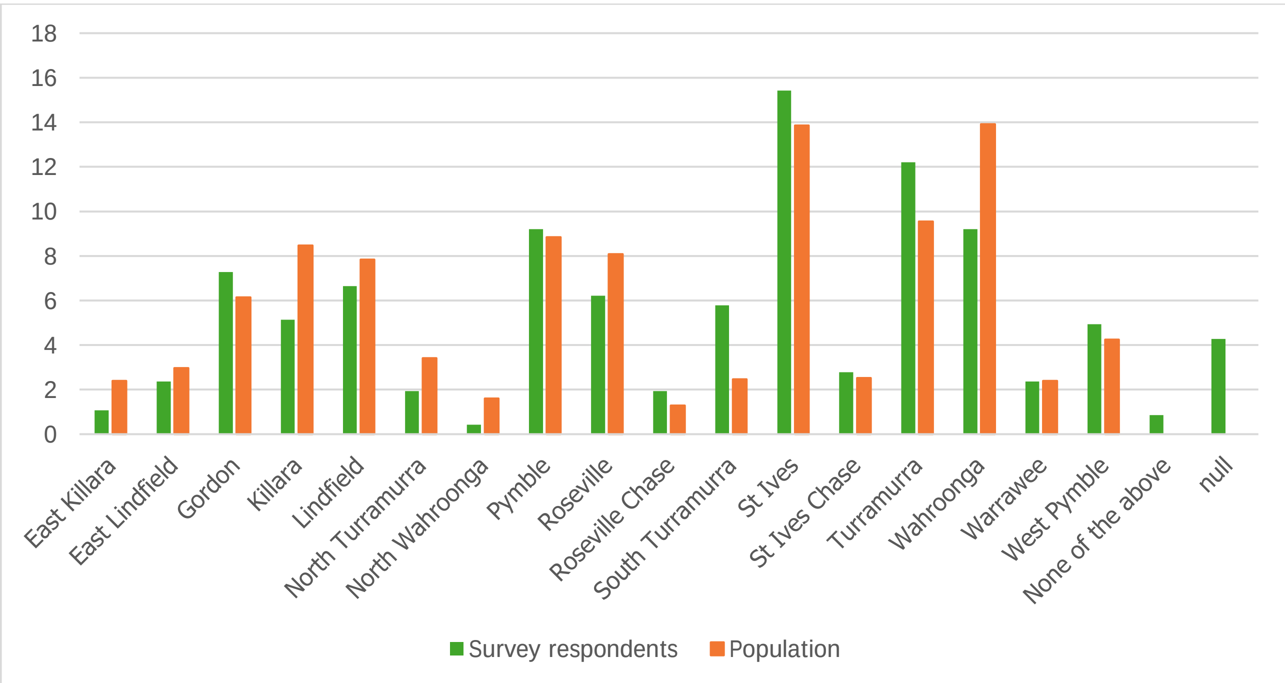
C Community Engagement, education materials and distribution 2019

A Survey participant profile

Which suburb do you live in?

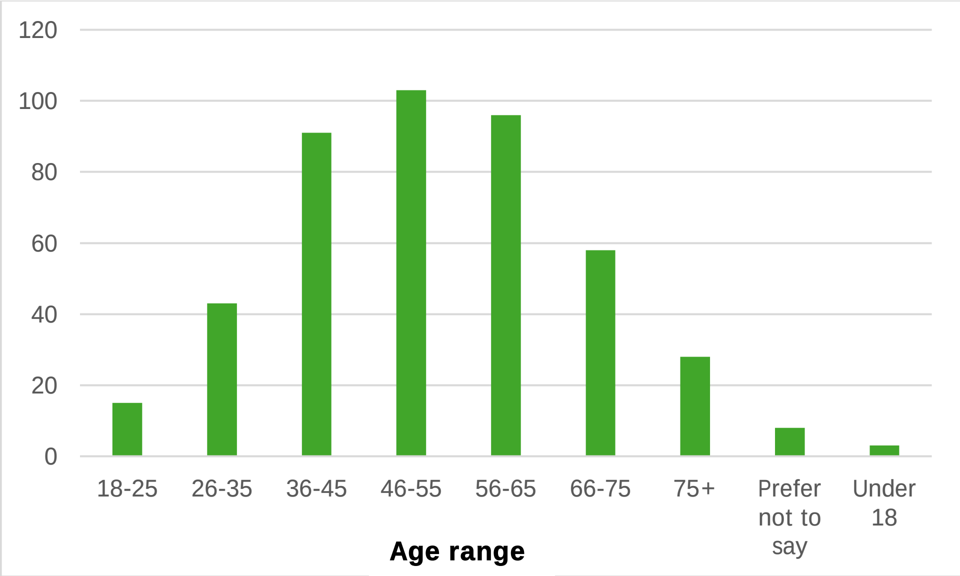


Comparison of respondents from each suburb (presented as a percentage of total survey respondents) and population of each suburb[1] (presented as a percentage of the total LGA population)

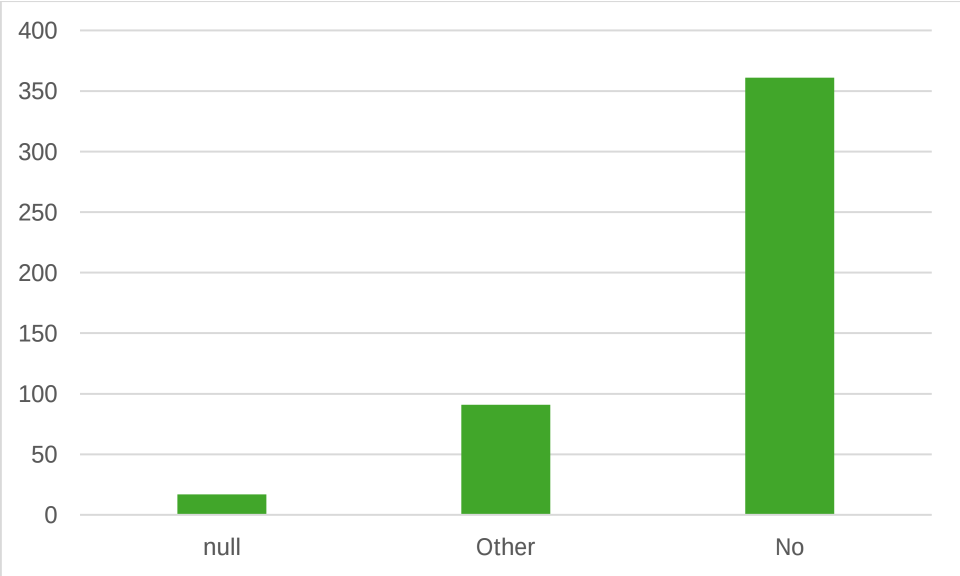


[1] Source: http://www.kmc.nsw.gov.au/About_Ku-ring-gai/Land_and_surrounds/Suburbs_and_maps

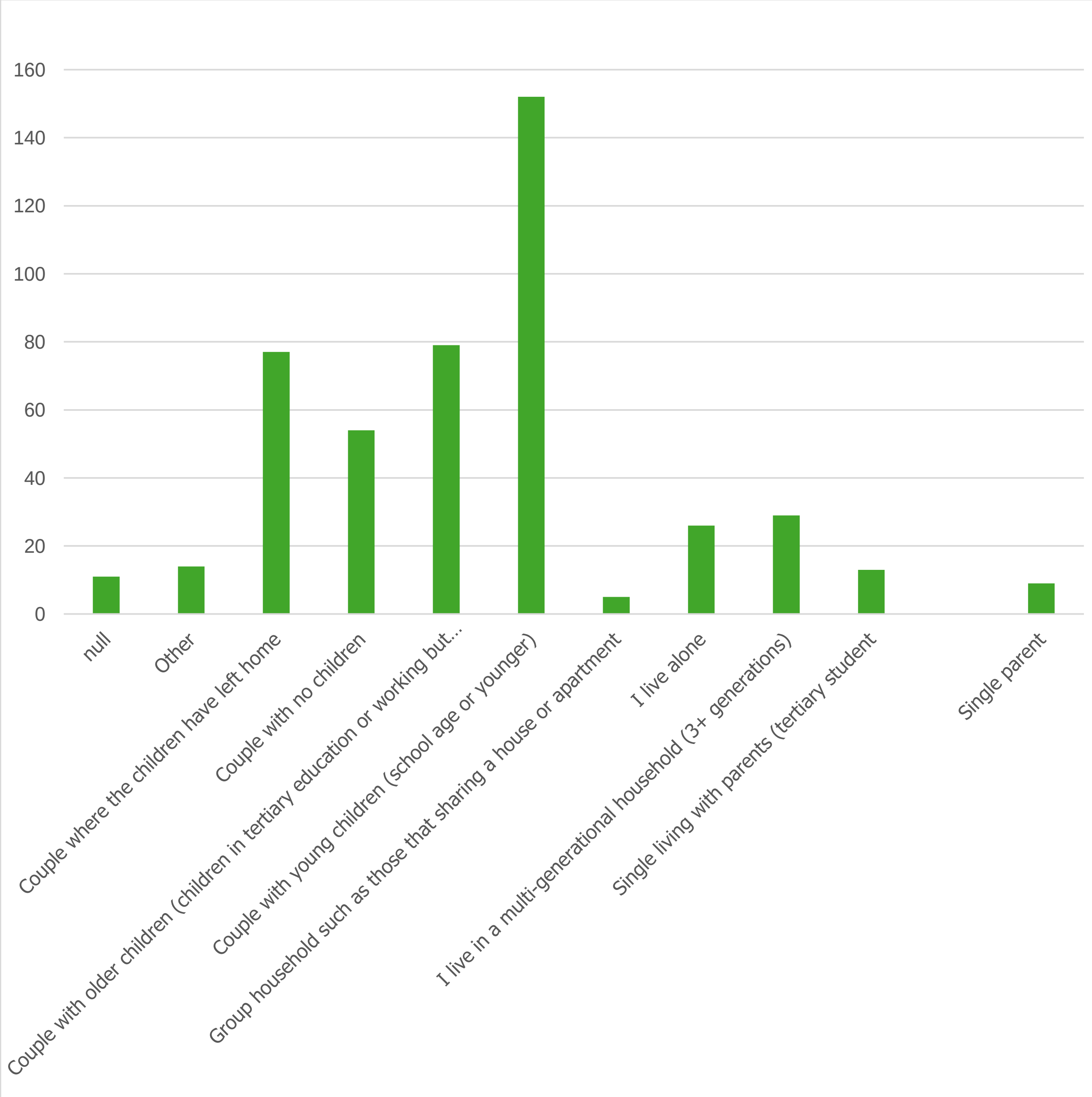
What is your age?



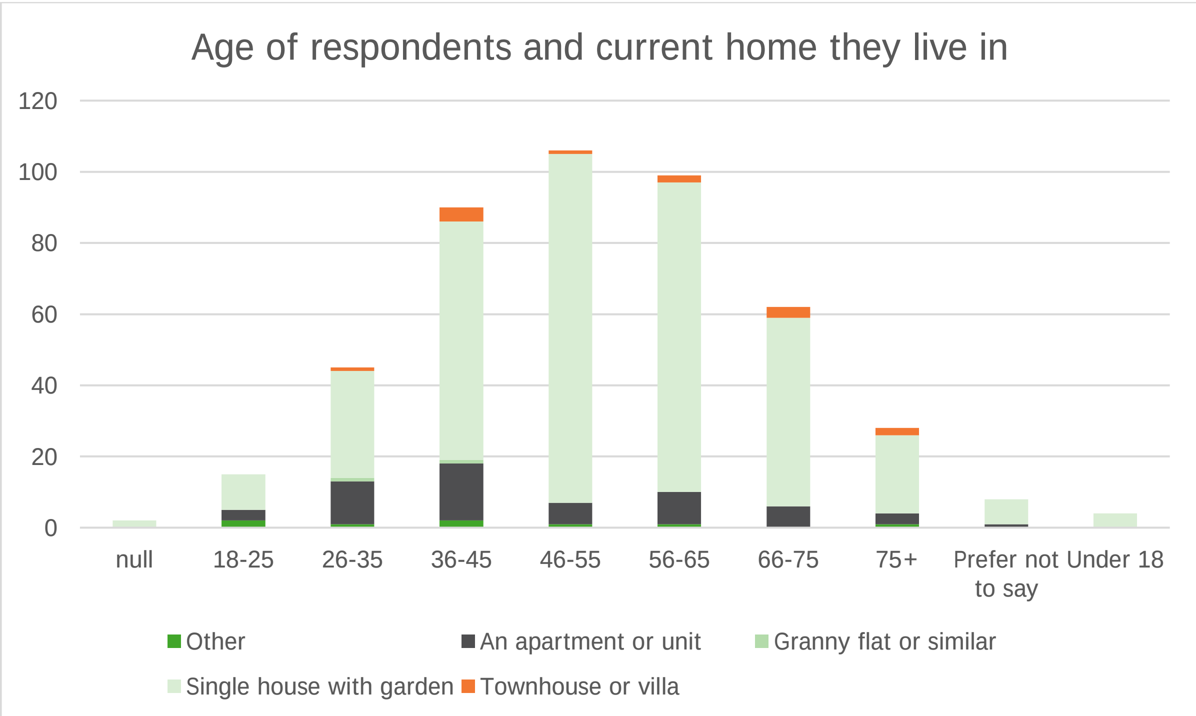
Do you speak a language other than English at home?



How would you best describe your current household?



What kind of property do you live in?



B Community Sounding Board meeting notes

Meeting note

Ku-ring-gai Council Housing Strategy: Community Sounding Board meeting

Project	Ku-ring-gai Council Housing Strategy	**Date**	11 November 2019
Ref No.	19_9309	**Time**	6:07pm
Purpose	Document the Community Sounding Board meeting		
Chair	Jacqui Salter (JS), Elton Consulting	**Recorder**	Chris Larsen, Elton Consulting
Attendees	Stakeholders: » Robin Fletcher, Link Housing » Michele Bell, Ku-ring-gai Neighbourhood Centre » Ernest Yung, CASS Group » Ian Cameron, Rotary Club of Wahroonga » Caroline English, St Ives Park Primary School » Gerry Vella, Gordon East Probus Community representatives: » Maree Kirkpatrick » Carrie Wormald » Nathan McMullen » Brian Dorricott » Hannah de Botton » Kate Grove » Sarah Gilkison » Nick Chapman Ku-ring-gai Council staff: » Virginia Leafe » Rathna Rana » Antony Fabbro » Angela Sidmore	**Apologies**	» Daniel O'Keefe (community representative)

Item	Discussion Point	Participant Q&A / comments
1.	**Introductions & background** After introductions, JS opened the meeting by giving attendees some background information on the project: » Clarification: the Community Sounding Board group was not a decision-making body, it serves to gauge the feelings of the community and report back to Ku-ring-gai Council	Q: Is the Council's direction on this issue already set? A (Antony Fabbro): The Community Strategic Plan was written on the basis of feedback from the community over the past four years, and meets the requirements

	» There have been 450 responses to the community survey, and the Community Sounding Board group would assist in responding to those comments » Background to the project: every LGA in the state is required to develop a housing strategy; each strategy must address growth and changes in demographic profiles; housing strategies must be reviewed by Councils on a regular basis » There are key planning priorities outlined in Ku-ring-gai Council's draft local strategic planning statement, and these indicate the key directions for housing in the LGA: > Housing should be close to transport, services & facilities > Housing should meet the requirements of a diverse & changing community > There should be a range of housing options to enable ageing in place > Housing should be affordable » Ku-ring-gai Council wants to understand the community's needs in order to plan to meet those needs JS outlined the key findings from the Council's processes undertaken, to date: » Ku-ring-gai Council anticipated growth of 1.1% per annum to 2036, which was modest compared to some parts of Sydney » The number of residents aged over 65 is expected to grow by 49% by 2036. There is expected to be an additional 6000 single- and couple-only households in the area » Approximately 73% of housing stock is single detached dwellings » By 2036, 43% of households in Ku-ring-gai are expected to be lone or couple only households » There has been a rise in housing stress in Ku-ring-gai » The objective of the Housing Strategy is to help Ku-ring-gai Council plan for future housing requirements	set by the State Government. Q: A participant queried the influx of CALD communities into the area. A (JS): Analysis of housing related to CALD communities is underway, and will explore that issue in finer detail. Q: Has there been a relocation of 25-30-year-olds out of the district? A (JS): In terms of an ageing population, Ku-ring-gai LGA has one of the highest levels of ageing population.
2.	**Group exercise** Attendees participated in a group exercise in which they identified, discussed and then ranked the recurring themes from the community Housing Strategy community survey. The key themes identified (ranked from most important to least important) were: » Infrastructure (including transport) » Desire for different housing types and/or flexible zoning (e.g. small townhouse, small garden) » Opposition to high density, but support for density in clearly-defined areas » Opposition to congestion » Desire for preservation of trees/tree canopy » Heritage/character concerns » Desire for increased social amenity (e.g. dining, etc)	

	» Desire for existing residents to be able to stay in the same area » A mix of demographics should be accommodated (e.g. multi-generational housing, over-55s) » Desire to be able to walk to rail transport » Elderly fear of leaving the area/opposition to generational change » Desire for high quality housing » Desire for variety & choice in housing » Desire for different ownership options » Desire for appropriately-sized dwellings » The importance of key worker accommodation/affordability	
3.	**Feedback themes** Attendees discussed the themes identified in more detail, with the following feedback noted: » Infrastructure: > It was important to solve the issue of traffic congestion and queueing, and build connections between different modes of transport. Infrastructure solutions should not just cater to cars > There is a tolerance for density, provided infrastructure is provided to service it > Infrastructure and transport should help build communities, not fracture communities > Carparking spaces should be introduced intelligently in order to improve access and usage of public transport and community facilities > It should be recognised infrastructure can help drive demographic change (i.e. it has the ability to impact who could be attracted to the area) > Infrastructure should be provided according to a long-term vision, instead of short-term fixes » Options for housing: there is a need for different forms of dwellings, which should be appropriately sized » Trees & heritage: > The desire for retention of trees and tree canopy should not be viewed as a stance against development > The preservation of trees presents a compromise: construction materials and design quality should complement the tree canopy » Density: > It is important to get the 'density formula' right > Ku-ring-gai Council has an opportunity to show leadership through development carried out on its own land holdings » Quality & affordability: > There is an expectation housing should be of high quality	A participant expressed a concern that the community survey may not be representative of the Ku-ring-gai LGA population.

	> New housing options should accommodate the changing circumstances of residents (e.g. people will not transition from a large family home to a small high-rise apartment easily) > Ku-ring-gai Council may have assist ensure housing affordability and affordability for key workers. This is particularly important given healthcare is the major employer within the Ku-ring-gai LGA	
4.	**Next steps** JS outlined the next steps to be undertaken in the process *(refer to the slide deck for more detail)*. It was confirmed that the next meeting of the Community Sounding Board group would be held on December 2, 2019, with the time and venue to be confirmed closer to the date. An overview of the housing analysis undertaken would be provided at that meeting.	

Meeting note

Ku-ring-gai Council Housing Strategy: Community Sounding Board Meeting #2

Project	Ku-ring-gai Council Housing Strategy	**Date**	2 December 2019
Ref No.	19/9309	**Time**	6 – 8pm
Purpose	Document Community Sounding Board meeting discussions		
Chair	Jacqui Salter (JS)	**Recorder**	Aparna Casimir

Attendees

- Michele Bell, Ku-ring-gai Neighbourhood Centre
- Ernest Yung, CASS Group
- Ian Cameron, Rotary Club of Wahroonga
- Gerry Vella, Gordon East Probus
- Carrie Wormald
- Nathan McMullen
- Brian Dorricott
- Sarah Gilkison
- Nick Chapman

Ku-ring-gai Council staff:

- Angela Smidmore
- Rathna Rana

Elton Consulting:

- Jacqui Salter (JS)
- Aparna Casimir

Apologies

- Maree Kirkpatrick
- Robin Fletcher, Link Housing
- Caroline English, St Ives Park Primary School
- Hannah de Botton

Discussion point	Participant comments/questions
Purpose and objectives of Community Sounding Board Meeting 2 **Confirmation of the notes of previous meeting**	
1. » Attendees were provided notes from the previous meeting. JS asked attendees to review the summary of what was heard.	» 'Desire for social amenity' should be higher on the list. **Action for Elton Consulting to elevate this on the list.** » 'Desire for variety in housing types' should be higher as there was much discussion last meeting about subdividing and providing for different demographics. **Action for Elton Consulting to elevate this on the list.** » 'Desire for high quality housing' was about certification issues.

Discussion point		Participant comments/questions
		Action for Elton Consulting to amend wording.
Brief overview followed by discussion on the initial outcomes of the community survey and analysis		
2.	» JS presented demographics of those who completed the community survey and explained that other engagement activities completed include a youth focus group and interviews with those in the aged care sector. » Someone from everyone suburb responded to the survey, with a spike from people in St Ives. » As you would expect from Ku-ring-gai, those who live in a single house with garden dominated the respondent pool. » There has been a reasonable response from people of a Culturally and Linguistically Diverse (CALD) background, although we would have liked it to be higher.	» The age group spread of respondents is a reasonable representation of the Ku-ring-gai population. » Qu: what was the percentage of the population that completed the survey? A: JS advised that 472 people completed the survey
3.	» While the number of people who nominated a detached house as suiting their current needs (275 responses) is not surprising, it is less than the number of people who stated they currently live in a detached house (375 responses). » While 13 people currently live in terrace housing, 150 said suited their current needs. » JS presented numbers of different housing types available in Ku-ring-gai which showed there is not a lot of terrace housing available compared to other LGAs. » JS presented the attributes that survey respondents nominated they look for in housing.	» The discrepancy between housing nominated as suiting current needs and actual current housing is surprising. » The nominated attributes are not really as much of an age bias as you would expect; and housing near public transport skews towards younger people as would expect. » It is interesting that people want houses close to shops as small local shops are struggling to survive. One attendee gave an example of a number of small shops in Turramurra that have closed over recent years. This led to a discussion about what density is needed to support shops: > In addition to density, you need to be able to easily access shops, including by public transport. > The nature of shops might dictate the style of adjacent housing. > Chatswood is an interesting example as it is an area that has blossomed. It has 2 or 3 major shopping areas, apartments and good public transport.

Discussion point	Participant comments/questions
	> JS noted that a major retailer relies on a population of 10,000 people, and that accessibility of a centre will affect its viability. > Participants noted that analysis is required to determine the optimal density to make all services and shops better for the local community. » There has been a loss of local services. One participant noted that housing types are not right in certain areas. They gave the example of Turramurra where there are expensive houses however people are not spending money within the local area, resulting in a lot of local shops leaving. » Housing needs to service the needs of entire community. For example, younger families can't afford low disunity houses so they live in flats » JS noted that while Ku-ring-gai generally has high incomes, there is a growing proportion of low incomes as well.
4. » JS presented demographic projections, noting that by 2036 there will be a 43% increase in the number of 1 and 2 person households in Ku-ring-gai. » JS noted that although 13 survey respondents live in terrace housing, over 200 nominated it as suiting their future needs. » JS noted that survey responses about the nominated attributes that look for in future housing supports discussion earlier in the meeting about access to shops, public transport and supporting infrastructure.	» Qu: are the responses regarding granny flats due to building constraints? A: JS clarified that there are two different types of granny flats. While there are not a lot of constraints on building a granny flat in the backyard of an existing property; building one *within* the existing property requires compliance with fire codes etc. Under the SEPP, most single dwellings in Ku-ring-gai can have a granny flat as a complying development. » Attendees noted that while many respondents want a detached house, about half say they want to stay in their current property and subdivide. Attendees agreed with this: **"I'd like to be able to do more with what I've got."** » Qu: What does housing close to shops mean? A: JS clarified this is shops within walking distance.
5. » JS presented a comparison between survey responses and 2016 dwellings data of other North District suburbs.	» The number of terraces/semi-attached houses in these suburbs is surprising, with the exception of Lane Cove which has more apartments. » It's surprising that Hornsby doesn't have more apartments as this is what they notice when they drive through. One participant noted that in their line of work they come across people in serviced aged care in their

Discussion point		Participant comments/questions
		own homes. In the Hornsby LGA, they would go to more unit blocks than in Ku-ring-gai. » People all want to come back to Ku-ring-gai in their 40s. » While people sometimes associate apartments with non-desirable living, you can have nice areas with apartments such as Mosman. However, these areas are generally apartments with 1-3 storeys, not 4+. In response, one participant suggested that in Ku-ring-gai you wouldn't see many high rise apartments and that **an increase in medium density would result in a "much better society that supports everyone."** » While the Ryde LGA has a lot of high rise apartments, it does not have a train line as the Ku-ring-gai LGA does, resulting in development without supporting infrastructure. JS noted a lot of the 4+ storey apartments within Ryde are being built in very specific locations around a new infrastructure projects, such as Macquarie Park.
6.	» JS noted that there is recognition that some centres need improvement, such as Turramurra, and sufficient housing is needed to make some of those changes viable.	» Improvement will depend on the age groups in the area, e.g desirable facilities for 25-45 year olds will be different to those for an ageing population. JS clarified that the housing strategy is looking at market housing and Council cannot direct who will in specific areas. It is critical to ensure there is enough supply.
7.	» JS presented survey results on the right mix of housing, broken down by age groups.	» While people want detached houses to provide separation from neighbours, they don't need large blocks of land. **"If Council changes regulations, you can put multiple detached houses on one block of land when houses need to be redeveloped."** » There is currently a lot of renewal in Ku-ring-gai with single detached houses being replaced by single detached houses. **"If those regulations were changed, a lot of the issues we're talking about would be flipped. For example, retirees can subdivide."** » Rather than a widespread approach, subdivision could be applied to specific lot sizes in central districts e.g. 1.5km from transport hubs; and include a number of requirements to make this a workable option.
8.	» JS presented survey results on housing needs and desires.	» The small number of selections of independent retirement living could be related to people

Discussion point		Participant comments/questions
		deciding to stay in their own homes as fees (e.g. strata) are higher than people expected. JS further noted that survey responses and stakeholders are saying that retirees want to be in a mixed community, not just a community of one age group, and still in walking distance of shops. A participant cited a block of 8-storey units in Lindfield as a good example of this as it provides a mix of people, easy access to pharmacists, doctors, a train station and major retailers. A participant noted that Aged Care Commissioner Susan Ryan recently suggested aged care support services above Warringah Mall as well as housing for aged care sector workers. JS and one participant noted that aged care providers are also looking to provide worker accommodation. » There is plenty of land in Ku-ring-gai which, with proper redevelopment, could accommodate more people as well as detached housing. A complex in Westleigh was provided as an example as each house is detached and someone takes care of the gardens.
9.	» JS summarised that participants want Council to support making better use of land resources across the LGA.	» While the minimum lot size in Ku-ring-gai is 790m^2, most are 1,200m^2. In North Sydney, lot sizes of 480m^2 are adequate to accommodate a free standing house with a front & back yard. » Increasing the population in large lots could help drive people to local shops and build small communities. » In some locations, providing appropriate density can help transform areas. » There shouldn't be any restrictions on subdividing unless there is a good reason e.g. fire safety. » A good approach would be areas you can subdivide without limitation, transitioning to heritage houses. If too much building occurs more than a 10/15 min walk away from stations, people will rely on cars. » **All participants were in agreement that there needs to be a balance between bushfire, heritage, walkability, character and creating vibrant centres.** » Making one area very dense takes pressure off surrounding areas. E.g Chatswood has many large high rises and takes pressure off Willoughby and Artarmon.

Discussion point		Participant comments/questions
10.	» JS presented a slide showing housing structure vs household member numbers (2016). The data showed that 1 person households account for 16% of dwellings in Ku-ring-gai, and 2 person households 29%. » The slide refers to 'bedrooms spare' which is based on 1 bedroom per person. There is a high number of households with 3 and 4 bedrooms spare.	» The taxation system encourages people to stay in their houses. » **"The government is trying to incentivise people to downgrade but the issue in this area is that there is no stock."** » Developers won't build in Ku-ring-gai because it is not feasible. It be more feasible if individuals were able to buy smaller (subdivided) blocks of land. » Subdividing properties works in Western Australia, and in Brisbane, there has been lots of houses designed with a number of wings. In Melbourne, Bayside Council has supported delivery of units/townhouses with a 475m^2 lot size. These work well and look nice. » JS suggested that the solution to allowing dual occupancy could be an urban design one. » One participant noted that the presented slide suggested that houses need to have flexibility with owners able to subdivide their property. » Turramurra town centre needs good thinking and planning, and definitely needs analysis to see where subdividing would work. Residents living away from shops want more flexibility to be able to subdivide. » All houses should be able to be subdivided unless there is a good reason not to.
11.	» In response to the previous discussion, JS asked participants what criteria is needed to allow subdividing is a way that would control the cumulative of more people moving into an area (e.g. traffic impacts).	» There are two approaches: 1. Build infrastructure before houses 2. Let people decide whether they want to subdivide, ensure any properties are built with sufficient space for future infrastructure, and then build infrastructure. » When delivering infrastructure first there is a danger it is surrounded by the incorrect mix of housing and people won't use it. » There is no reason infrastructure shouldn't be delivered across the LGA rather than in a staged approach. Concentrating development and infrastructure upgrades creates problems. » If blocks are split in two, the number of cars in the area will double.
3.	» JS presented a slide on outward migration from the LGA. Survey results provided some reasons as to why this is, with every age group overwhelmingly stating the area is too expensive.	» The number of people who said they prefer a different lifestyle in the 56-65 age group is interesting.

Discussion point		Participant comments/questions
		JS clarified that respondents are hypothesising why people in general are moving out of the area, not reporting back on what they themselves are doing. » Qu: what was the wording of the question and set up of responses? A: JS provided the wording of the question and clarified that the responses were options that people could select. » One participant suggested that focus groups carry more weight than the survey sample. JS explained that the survey, housing data and demographics all need to be looked at in tandem. » One participant noted that while residents 75-90 tend to want to stay in their current homes, those 60-75 are thinking of downsizing. If a resident has not made a decision to move by 75, they will generally stay in their homes.
4.	» JS presented slides on mentions of typology preferences in survey responses; and why certain developments were not preferred.	» Qu: did survey respondents select answers from a list? JS clarified that the slide presented categorises comments into themes.
5.	» JS presented a slide showing responses to people supportive of change to Council's housing approach.	» Comments categorised into the 'infrastructure - road/traffic' theme related to family journeys e.g. driving kids to sport on weekends. » It would interesting if the figures presented were scaled proportion of population or of survey responses. **Action for Elton Consulting to change the numbers on this slide to percentages**. » Qu: what was the response to Local Strategic Planning Statement (LSPS) principles? A: JS advised that respondents found the LSPS principles reasonable.
Activity: principles and vision		
6.	» JS asked participants to articulate their housing principles in terms of what would/would not work for Ku-ring-gai. Participants were provided with pictures to help them identify elements that the did/did not like.	» Comments on which the group agreed include: > Getting interfaces (with surrounding environment) right > Provision of open space with denser living > Integration with landscape > Sites that provide plenty of canopy opportunities

Discussion point	Participant comments/questions
	> Multipurpose social spaces (e.g. sports facilities with cafes): the Village Green concept should be part of all key centres. > Active transport infrastructure (whether pedestrian or cycling). » Other comments raised include: > There was not one picture of units/terraces/townhouses > Some pictures had quite low quality building finishes > Open space should be provided in concert with density > Green space should cater for different demographics > Liked pictures that showed mixing of old and new > Apartments should be nicely built, quality buildings > Apartment buildings should provide privacy, large trees and outdoor space. They look better when integrated with the surrounding landscape. > Houses need to be designed to cater for local communities, taking into consideration needs of market, rather than to SEPP 65. > A discussion was had on the role of tree/planting in housing principles: — If Ku-ring-gai's differentiator is the area's tree canopy, then any trees taken out need to put back in, with the goal of making the area more aesthetically pleasing as a whole. — As blocks get smaller, Council should look at different species of trees/plants. — How the building sits in the landscape setting is the primary consideration. — All forms of housing need to have good respect for and space to regrow vegetation. — The intention of Council's tree policies in past have been misguided. For example,

Discussion point	Participant comments / questions
	needing to preserve some trees has had disastrous effects. Residents need to be able to replant trees/vegetation to suit the specific environment and housing type. Council should encourage sensible replanting where appropriate; and supporting regrowth opportunities as well as preservation. > A subdivision approach (as discussed earlier in the meeting) should retain open space areas. > Improve the local amenity. > Council should advocate for over-station development (as occurs e.g. Bondi Junction and Chatswood) > Council should also advocate for undergrounding power lines » Attendees also wrote comments on the back of some pictures. These are noted on the table below. Note: while many images were provided, the table below includes only the images that attracted comments.
Summary and what's next	
7. » JS advised that the next meeting will be held on 24 February 2019. » The project team will hold a series of workshops in 2020, to which Sounding Board Members will be invited. » The next meeting will include an overview of workshop discussion. » JS asked participants to share any final thoughts about what was discussed at today's meeting.	» Participants noted that interesting findings/discussions included: > Balancing trade offs > **"People are more open to change than I thought."** > There appears to be a couple of main approaches to delivering housing: — More planned — More organic, market-driven > Frustrated with current traffic. The more people who move into the area, the worse it will get.
Meeting closed.	

Comments on images

Image	Comments	Image	Comments
	» Quite like – privacy and large trees		» Building is not integrated well with landscape » Landscape (and building) looks scrubby and cheap
	» Quite dislike – mismatch of house c apartment		» Dislike – tree canopy is [illegible]
	» Like shade (whilst trees grow), kids amenity		» Like the open space
	» Quite like – colour, below tree canopy		» Nice park with dense living » Like to open space
	» Don’t like: > Frontage to street > Open garage > “Lego land” design		» Like balance of tree canopy and building

Meeting note

Ku-ring-gai Council Housing Strategy:
Community Sounding Board meeting

Project	Ku-ring-gai Council Housing Strategy	**Date**	24 February 2020
Ref No.	19_9309	**Time**	6:00-8.00pm
Purpose	Document the Community Sounding Board meeting		
Chair	Jacqui Salter (JS), Elton Consulting	**Recorder**	Wendy Salkeld, Elton Consulting
Attendees	» Michele Bell, Ku-ring-gai Neighbourhood Centre » Ernest Yung, CASS Group » Gerry Vella, Gordon East Probus » Maree Kirkpatrick (community representative) » Brian Dorricott » Hannah de Botton Ku-ring-gai Council staff: » Virginia Leafe » Rathna Rana » Angela Sidmore	**Apologies**	» Robin Fletcher, Link Housing » Ian Cameron, Rotary Club of Wahroonga » Caroline English, St Ives Park Primary School Community Representatives: » Carrie Wormald » Nathan McMullen » Sarah Gilkison » Nick Chapman

Item	Discussion Point	Participant Q&A / comments
1.	**Notes from previous meeting** **Purpose/objectives of Community Sounding Board meeting 3** JS welcomed attendees. Meeting notes from the last Community Sounding Board meeting were approved. JS reminded the meeting of the engagement steps undertaken to date: community survey, focus groups, interviews and just recently community workshops. JS advised that the purpose of the meeting was to provide a summary of what occurred at the workshops, gauge the feelings of the community discussions at the workshop and then develop key principles for guiding the housing strategy to report back to Ku-ring-gai Council.	
2.	**Overview of discussion at the February 2020 Community Workshops** JS explained that there were six community workshops held in February 2020. Four of the workshops were focussed on a geographical area, one workshop gathered resident action groups representatives and the sixth workshop targeted youth in the Council area. JS presented the slides that were shown at the community workshops. JS stated at each workshop, and it was noted by Sounding Board attendees, that the data shown is not endorsed by Council and was used to stimulate discussion. The	

presentation started by summarising the themes that were identified previously by the community.

Housing feedback themes:

» Strong desire for townhouses and villas as there aren't any

» Ability for property owners to subdivide land – every workshop had this theme

» Any high-density development in clearly identified areas and must have diversity

» Protect Ku-ring-gai identity which includes trees, maintaining open space

» Affordability across the spectrum for young, old and families

» Locations with access to transport facilities

The Chair then presented data on the Ku-ring-gai demographics

Age forecastings

» Smaller households overtaking family

» The number of residents aged over 65 is expected to grow by 49% by 2036. There is expected to be an additional 6000 single- and couple-only households in the area

» Outward migration of young people - high in Hornsby

» Northern Beaches – ageing population moving there

Housing stock:

» Approximately 73% of housing stock is single detached dwellings

» By 2036, 43% of households in Ku-ring-gai are expected to be lone or couple only households

» KRG: new homes (apartments) coming 4000 in pipeline. Is it expected to slow down?

» 6,000 already done (DA etc)

Housing Needs Analysis

JS advised that a housing needs analysis was undertaken. With consideration of the population forecasting and the existing housing stock, the type, quantity and location of housing that might be most suitable for various groups in the future was estimated. For example, 2006-2016 has shown an increase in aging population and an increased need for apartments as there is not much available in the LGA. Given the limited data on apartments and villas in Ku-ring-gai, broader Australian data was also considered.

Urban Centres Approach

Four urban centres were the geographical focus for analysis. Lindfield, Gordon, St Ives and Turramurra. The aim was for the community to consider what would a change in housing in these centres mean on the ground. What would people see?
It was noted that the St Ives centre was looked at with consideration of a mass transport initiative.

Council urban planners looked at constraints

The analysis considered the following considerations and constraints:

» Walkability – consideration that housing would be within approximately 800m from the rail station
» Constrained land such as heritage and conservation areas
» Biodiversity limits
» Bushfire risks
» Watercourses had to be avoided
» Land that was too steep for development
» Land already recently developed
» Land zoned recreational/green space

Maps to stimulate discussion were developed

Maps were displayed that showed the land that is left in the urban centres following consideration of the constraints etc above.
The maps were developed for consultation purposes only – not endorsed by Council. The maps are able to show breadth and depth of typologies presented through possible scenarios. Three scenarios were displayed for each urban centre. The scenarios are not prescriptive but instead can be viewed to highlight contrasting approaches that could well be blended.

3. **Discussion of workshop feedback**

LINDFIELD (WORKSHOP 1)

All three scenarios give 1600 dwellings and can be summarised as:

1. Apartments/townhouse – greater amount
2. Townhouses, mid-scale and larger scale apartment therefore contracted in area
3. Quite tight, but more confined over one side of Lindfield

The attendees discussed the scenarios, recorded as scenario 1,2,3 (S1, S2, S3), comments are adjacent.
JS reminded the group that it is not limited to one scenario or the other, they could have a mix of scenarios.

JS reported the feedback from Community Workshop 1:

» Strong support for mix between 1 and 2
» Change from lower scale

The Chair asked if anyone saw any negatives in this approach? when you get a high scale development you get developer contributions

The Chair advised that she did speak to Transport for NSW and they mentioned on-demand services considerations. The Chair advised that this theme did emerge at the workshops.

The Sounding Board agreed with Community Workshop 1 outcomes.

» Two attendees were not keen on multi-storey apartments and saw above 4-6 stories as too high.
» The group discussed the value of keeping level storey across the LGA rather than having high in spots and not in other
» Feel like apartments bring more car issues due to limited parking on offer, with a recommendation that that any new apartments need to offer 2 car-spots.
» People live in the area to get away from apartments.
» The difference in speed of each scenario to deliver or reach the target was noted.
» S3 appears to deliver more space as it doesn’t change the area around it. S3 supports more development.
» S1 would take a long time as we have to wait for people to move
» S3 throws up apartments while people still live there in the other area (yellow on S1)

- One attendee asked can Council add more green space
- townhouses at least have some outdoor space, but not the big 10-15 storey buildings
- everyone wants to walk 10-15mins to the station
- Singapore – tall buildings but large amount green space, it is important
- Need to change modes of transport. Perhaps alter major mindset, bikes, electric scooters, self-driving cars, hovercrafts. Will also need to consider bike storage and create bike paths. Although wouldn't ride bike on Pacific Highway. Need also to consider climate and sweat from riding.
- Consider shuttle buses, like Breakfast Point to ferry
- Noted that everything is car based

GORDON (WORKSHOP 2)

JS reported the feedback from Community Workshop 2:

JS advised that 20 storey apartments is what is considered economically feasible to get even for centre development/revitalisation. Note that the Chatswood towers height are around 40 storeys.

The question was raised by community that if we have substantial development, can we "claw back land'?
The community workshop stated that we need revitalisation and the level of services are no good.

Youth – not averse to having more height if it will help the centre improve – accepted trade off.
Overall - More towards S1.

The Sounding Board agreed that need to keep heights down although they understand the feasibility issue, would prefer a height compromise.

- ----------------------------------
- People wanted townhouses
- Q: If Gordon redeveloped, would the Pacific Highway need to be widened? A: need arteries, tunnel or resume land
- Singapore doesn't look too bad, there is so much green space, unlike Waitara.
- In Waitara there are buildings without lifts operating or lifts are unreliable (due to storms and flooding). Need to consider access issues. Townhouses don't have these issues.
- Infrastructure stress to consider.
- If more apartments, better for a Singapore model e.g. join gardens, work together

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TURRAMURRA (WORKSHOP 3)

JS pointed out the Sounding Board to note differences in the scenarios.

JS reported the feedback from Community Workshop 3: More on S2, but with a little bit of pink.
Most people appreciative of the hub project and trying to get the other side of the Highway working.
People really want improvement to the area but questioned why aren't other areas being considered in Turramurra, i.e. further away.

The Sounding Board agreed with the importance of design and architecture and discussed what helps to achieve this.

The Sounding Board discussed avoiding access directly from the Pacific Highway for any new developments. The Chair advised that RMS will agree and many blocks don't have access from the Pacific Highway now.

The Sounding agreed with a mix of S1 and S2.

etc it may be better than what seeing now.

» No grand plan with Gordon, lots little shops. Difficult with Pacific Highway. Wahroonga is very different from Gordon.
» Still lean towards scenario 1 – more diverse. Rather have 10x ten story buildings to counteract the 20 storeys. Keep the height down. Intermingle. If you have a block going up then know you have to put in green space.
» Question the numbers and the typologies
» Scenario 1 has potential for the future and there more control over development.
» ---------------------------------
» Feasible to move further away but need transport
» beautiful houses in the area
» Roads around Turramurra doesn't cope with commuter parking
» Mix of S1 and S2
» Need some uniformity can't have high then low, needs to blend Good example in Turramurra. Good example – Alexander next to IGA. Good style.
» So many new buildings go up with no notice. Need a culture to drive the architecture.
» Brick design is good
» Paris has uniformity, so too as Italy. Sydney exact opposite. If you have a lots of trees it is ok but with high rise trees don't help as buildings over power heights.

	-- ***ST IVES (WORKSHOP 4)*** In response to a question, JS advised that the highest buildings in the area are currently 6 storeys. JS reminded the Sounding Board that the housing strategy will be premised on better transport. For example, Mona Vale Road and a bus transit style was discussed by Transport for NSW, think of B-line on the Northern Beaches. The Sounding Board outcome of scenario discussion was somewhere in between S1 and S2.	» Greengate Hotel – blends in. Road between Greengate and Highway, Parice Ave. » Apartment blocks need a laneway for entry not off the Pacific Hwy. » Shopping centre needs improvement. » The owner of the Turramurra shopping centre wants high rise (tried twice) » St Ives has great distance from train therefore there are transport difficulties. » As a young family looking for a dwelling, St Ives was off the selection because of public transport. Liked it but wouldn't live there. » Chatswood line is a major breakthrough. We need further building of the Metro. » Demographic: lot of families, schools are packed and is a problem. "Golden triangle" » What is the impact on the schools? » If went with scenario 1 have to do something about schools. There are small private schools and the rest are public schools. » We need some purple » More yellow on S1 – less purple.
4.	**Develop Visions and Principles** What should guide the whole housing strategy 1. Keep it low and uniformed (Anything over 15 stories has a different mind-set) 2. Any new housing needs to blend in with the environment - a preferred style. Use architects, brick theme and draw upon good existing examples such as Alexander, Liberty Growth (across road from school) Lindfield on Grosvenor Rd. 3. Encourage more 4-5 storeys on blocks around centres where they do not currently exist.	» Centre based location focus: been talking 1-2km around station » When considering design, good examples identified were: Alexander, Liberty Growth (across road from school) Lindfield on Grosvenor Rd. » Note that the scenarios haven't considered outside this and wouldn't rule out 3-4 km away but would require shuttle buses.

	4. Change to insurances required due to quality of apartments concerns. 5. What an apartment can be, green space, blend green with apartment, solar power. Sustainable living. If 8 apartment blocks need to have green space in between. Sense of community important with green space. (Greengate Hotel good example –but need toilets) 6. Mix of housing: mixed ok, some multi-housing. 7. The North Shore line is an easy location to achieve the amount of housing stock required. The discussion has focussed on urban centres with a one km radius around the train station. Wouldn't rule out 3-4km away – but need to consider how to connect and need a hub or driver to provoke further consideration. 8. Alternative and active transport: shuttle buses, safer cycling: separate cycle/scooter tracks e.g paths thru parks to station, end of trip, bike parking 9. Accessibility on/off Pacific Highway to be safe and avoid congestion. 10. Character of Ku-ring-gai 11. Traditional owners of land – acknowledging in the planning	» Wouldn't rule out 3-4km away – but how connect? Hasn't been thought through. It is easier to comprehend but need a new idea. » North Shore line is easy location to achieve amount required.
5.	**Summary and what's next** The Sounding Board attendees discussed next steps. They noted that the next phase will be exhibition of the engagement outcomes and Councils consideration of the Housing Strategy. The Sounding Board agreed that a further meeting may not be required but will meet if need be. JS advised that she will confirm this with Council. The Sounding Board stated that the community consultation process has been great and very worthwhile.	

C Community Engagement, education materials and distribution 2019

Ku-ring-gai Housing Strategy

Community Engagement, education materials and distribution 2019

Contents

FIGURES

TABLES

APPENDICES

1 Council Website and OurSay Platform

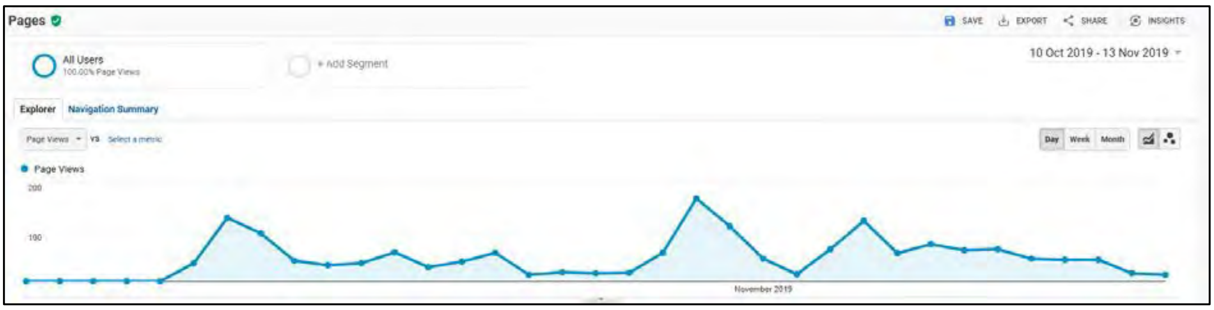
1.1 Council Website Summary

- After the ‘Ku-ring-gai Housing Strategy to 2036’ landing page, the webpage with the most views was the ‘What is the Housing Strategy?’ page, closely followed by the ‘Frequently asked questions about the Housing Strategy’ page.
- The page with the longest average viewing time was the ‘Frequently asked questions about the Housing Strategy’ page.
- The first peak in page views is possibly associated with the first Facebook post, advertisements in the Hornsby Advocate and the North Shore Times, the initial e-mail call out distributed to those who made a submission to the Draft *Local Strategic Planning Statement*, and the Housing Strategy displays set up in the Ku-ring-gai Library branches.
- The second peak in page views is possibly associated with the Ku-ring-gai, Ku-ring- gai Library and Sustainability E-news distribution.
- The third peak in page views is possibly associated with postcard and newsletter distribution, the advertisement placed in the Sydney Observer Magazine, and the third Facebook post.
- See Appendix A for detailed website analytics.

Table 1 Council Website Visitation Summary

Webpage	Launch Date	Page Views	Average Time Spent on Page
Ku-ring-gai Housing Strategy to 2036	15/10/19	**1,091**	00:02:07
What is the Housing Strategy?	15/10/19	119	00:02:09
Frequently asked questions about the Housing Strategy	15/10/19	118	**00:03:05**
Timeline and Progress of the Housing Strategy	15/10/19	100	00:02:20
Why do we need a Housing Strategy?	15/10/19	35	00:01:45
Why is the Housing Strategy Important?	15/10/19	22	00:01:37

Figure 1 Council Website Page Visitation



1.2 OurSay Platform Summary

- Over 50% of visitors used a desktop computer to access the OurSay page.
- Almost 73% of visitors clicked through to the OurSay page from Council's website.
- See Appendix B for detailed OurSay platform analysis summary.

Table 2 OurSay platform visitation

Variable	Total
Unique Visitors	273
Engaged Visitors	15
Questions or Ideas	13
Questions or Ideas Views	150

2 Press Advertisements

2.1 Press Advertisement Summary

» See Appendix C for advertisement record.

Table 3 Advertisement summary

Advertisement	Date
North Shore Times	17/10/19
Hornsby Advocate	17/10/19
The Vision China Times	28/10/19
The Vision China Times WeChat	28/10/19
Sydney Observer Magazine (Article and Advertisement)	4/11/19

3 Email Distribution

3.1 Email Distribution Summary

» See Appendix D for email distribution record.

Table 4 Email distribution summary

E-mail	Date	Number of Recipients
1. E-mail distributed to LSPS submitters and those who have requested updates	15/10/19	81
2. Ku-ring-gai Library E-News	29/10/19	15,335
3. Ku-ring-gai E-News	30/10/19	11,631
4. Ku-ring-gai Sustainability E-News	1/11/19	3,440
5. E-mail distributed to LSPS submitters and survey respondents with Housing Strategy prompt	6/11/19	103

4 Facebook

4.1 Facebook Post Summary

» See Appendix E for all Facebook posts.

» See Appendix F for the Facebook advertisement that was undertaken to recruit workshop participants. It was shown 16,481 times, to 7,556 people. Of these, 107 people clicked the link.

Table 5 Facebook summary

Facebook Post	Date	People Reached	Post Clicks	Link Clicks	Reactions, comments and shares	Comments
Post 1	16/10/19	4,142	608	69	49	26
Post 2	23/10/19	4,616	174	59	50	3
Post 3	4/11/19	4,399	189	58	76	16
Post 4	8/11/19	3,076	174	45	14	4
Total		**16,233**	**1,145**	**231**	**189**	**49**

5 Poster, Postcard and Newsletter Distribution

5.1 Hard-copy Collateral Distribution Summary

- A total of 3,900 postcards distributed.
- A total of 20 posters displayed.
- A total of 500 English, 300 Chinese and 200 Korean newsletters distributed.
- A total of 36 hard copy completed surveys collected from the libraries and Council Chambers.
- See Appendix G for photo record of collateral distribution.

Table 6 Collateral Distribution Summary

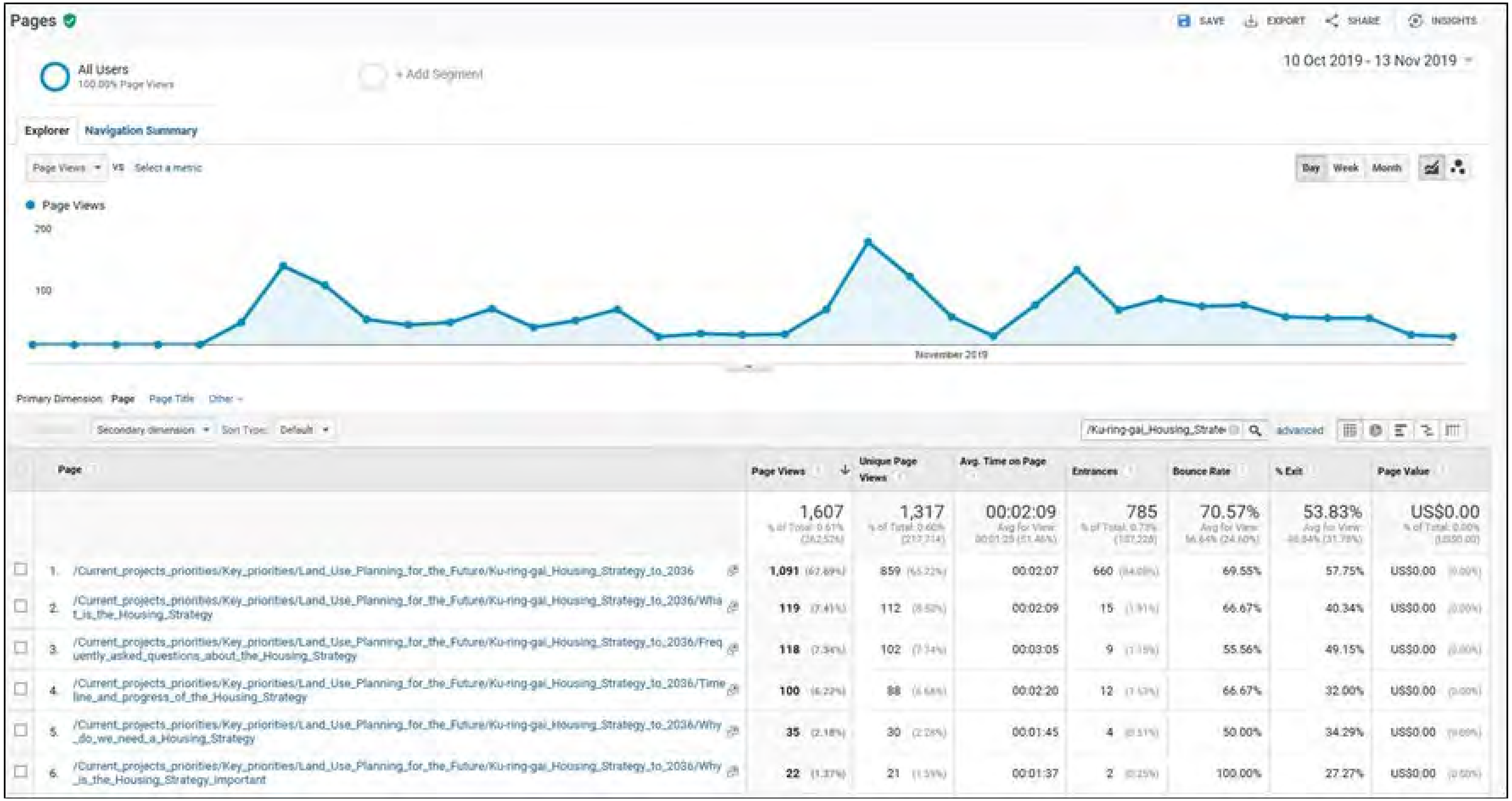
Location	Collateral	Number		Date Distributed
		TRANSPORT HUBS		
Gordon Station	Postcard	500 total	400 on peak	24/10/19
			100 off peak	29/10/19 and 4/11/19
Lindfield Station	Postcard	500 total	400 on peak	30/10/19
			100 off peak	29/10/19
Turramurra Station	Postcard	500 total	400 on peak	31/10/19
			100 off peak	31/10/19
Roseville Station	Postcard	350 total	300 on peak	30/10/19
			50 off peak	29/10/19
Killara Station	Postcard	350 total	300 on peak	4/11/19
			50 off peak	4/11/19
Pymble Station	Postcard	350 total	300 on peak	7/11/19
			50 off peak	31/10/19
Wahroonga Station	Postcard	350 total	300 on peak	4/11/19
			50 off peak	31/10/19
St Ives Shopping Village Bus Stop and Mona Vale Road Bus Stop	Postcard	122 total	72 on peak	5/11/19
			50 off peak	5/11/19
Roseville Chase Bus Stop	Postcard	61 total	41 on peak	5/11/19
			20 off peak	5/11/19

Location	Collateral	Number	Date Distributed
LIBRARY BRANCHES			
Gordon Library	Postcard	50	17/10/19
	Poster	1 x A1	17/10/19
	Newsletter	50 x English	17/10/19
		30 x Chinese	4/11/19
		20 x Korean	
	Survey	50	17/10/19
Lindfield Library	Postcard	50	17/10/19
	Poster	1 x A1	17/10/19
	Newsletter	50 x English	17/10/19
		30 x Chinese	4/11/19
		20 x Korean	
	Survey	50	17/10/19
Turramurra Library	Postcard	50	17/10/19
	Poster	1 x A1	17/10/19
	Newsletter	50 x English	17/10/19
		30 x Chinese	4/11/19
		20 x Korean	
	Survey	50	17/10/19
	Survey Replenish	30	4/11/19
St Ives Library	Postcard	50	17/10/19
	Poster	1 x A1	17/10/19
	Newsletter	50 x English	17/10/19
		30 x Chinese 20 x Korean	4/11/19
COMMUNITY FACILITIES			
Customer Service Council Chambers	Poster	1 x A3	17/10/19
	Postcard	42	17/10/19
	Newsletter	50 x English	17/10/19
		20 x Chinese 20 x Korean	4/11/19
	Survey	50	17/10/19
Ku-ring-gai Art Centre	Postcard	25	28/10/19
	Poster	1 x A3	28/10/19

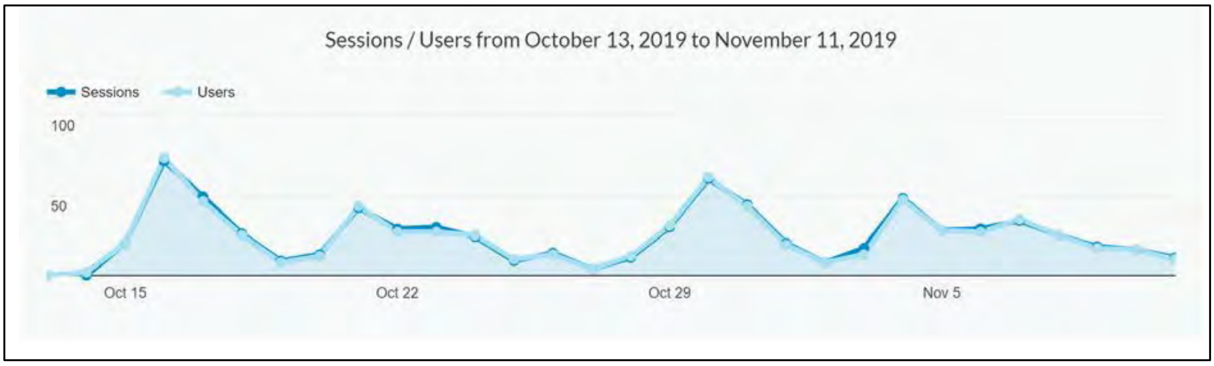
Location	Collateral	Number	Date Distributed
	Newsletter	30	28/10/19
West Pymble Pool	Postcard	50	28/10/19
	Poster	3 x A3	28/10/19
	Newsletter	35 x English	28/10/19
		30 x Chinese 10 x Korean	5/11/19
Wildflower Garden	Postcard	50	5/11/19
	Newsletter	30	5/11/19
	Poster	1 x A3	5/11/19
St Ives Community Hall	Poster	1 x A3	5/11/19
Ku-ring-gai Town Hall	Poster	1 x A3	5/11/19
	Newsletter	15	8/11/19
	Postcard	20	8/11/19
East Lindfield Community Hall	Poster	1 x A3	5/11/19
	Newsletter	30 x English 30 x Chinese 20 x Korean	5/11/19
	Postcard	50	5/11/19
Gordon Library Meeting Room Chinese Learning Group	Newsletter	40 x Chinese	5/11/19
Gordon Library Meeting Room Korean Learning Group	Newsletter	30 x Korean	8/11/19
Ku-ring-gai Neighbourhood Centre	Poster	1 x A3	4/11/19
	Newsletter	30 x English 30 x Chinese 20 x Korean	4/11/19
Lindfield Seniors Centre	Poster	1 x A3	5/11/19
	Newsletter	30 x English 30 x Chinese 20 x Korean	5/11/19
	Postcard	50	5/11/19
Turramurra Seniors Hall		Poster	1 x A3
Gordon AWOL Youth Hub		5/11/19 Postcard	50
	Poster	2 x A3	5/11/19
	Newsletter	50	5/11/19

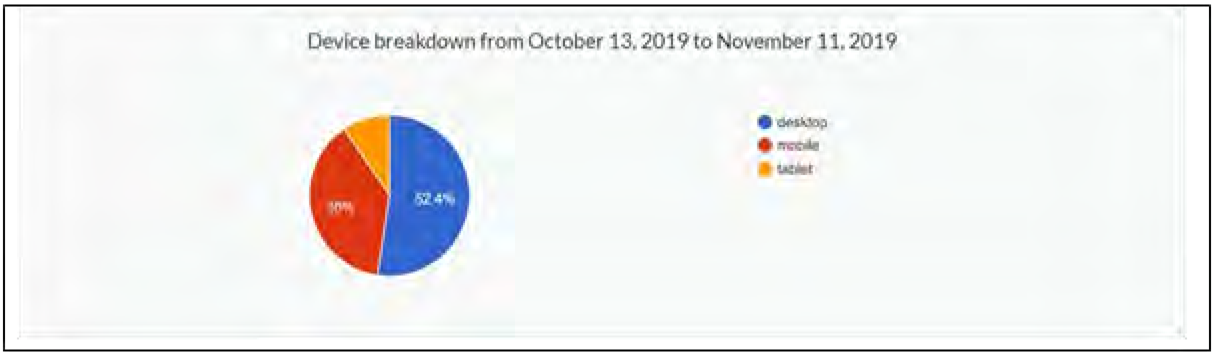
Location	Collateral	Number	Date Distributed
St Ives Youth Centre – The Fitz	Poster	1 x A3	5/11/19
Turramurra Youth Centre – The Landing	Poster	1 x A3	5/11/19
LOCAL BUSINESSES IN GORDON			
Bakerie, Pottery Green Bakers, Chalkboard Café, Missing Spoon, The Chicken Theory, Pure Brew, Franks Barber	Postcard	20 x each	7/11/19

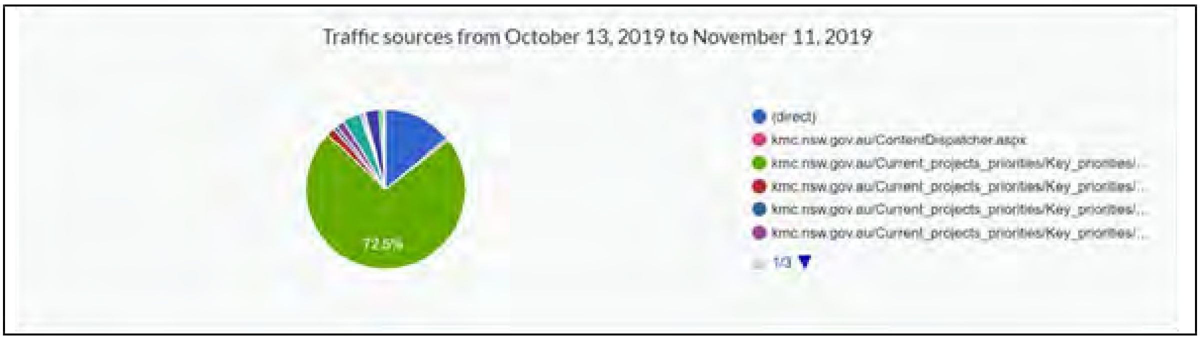
A Website Analytics

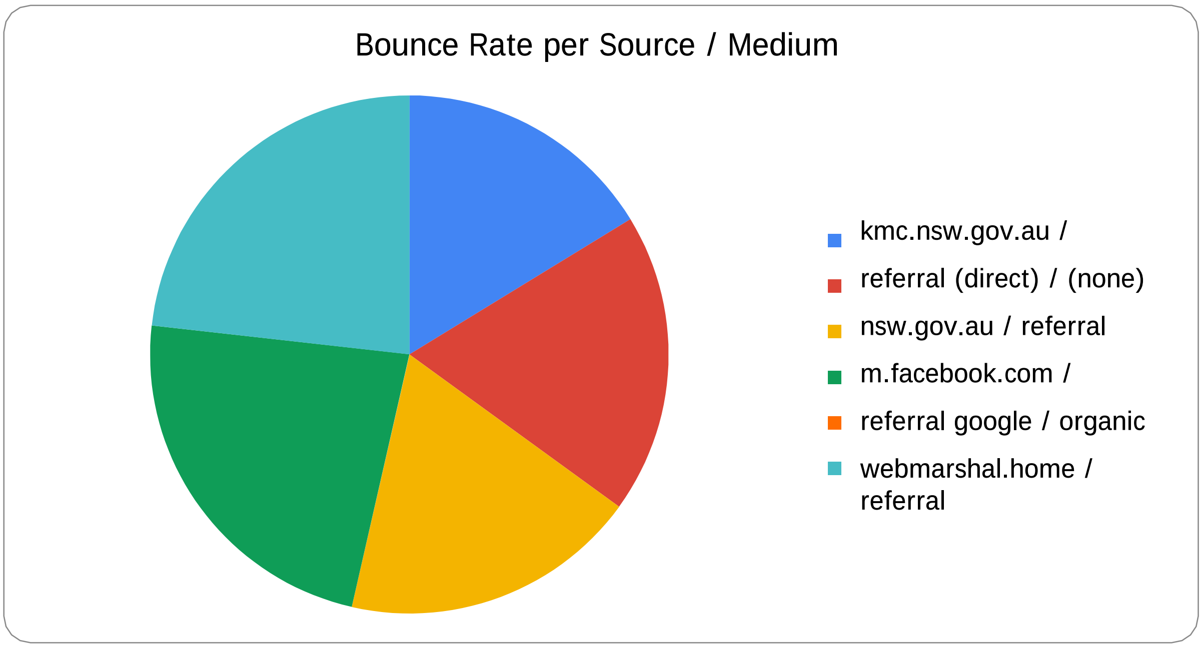


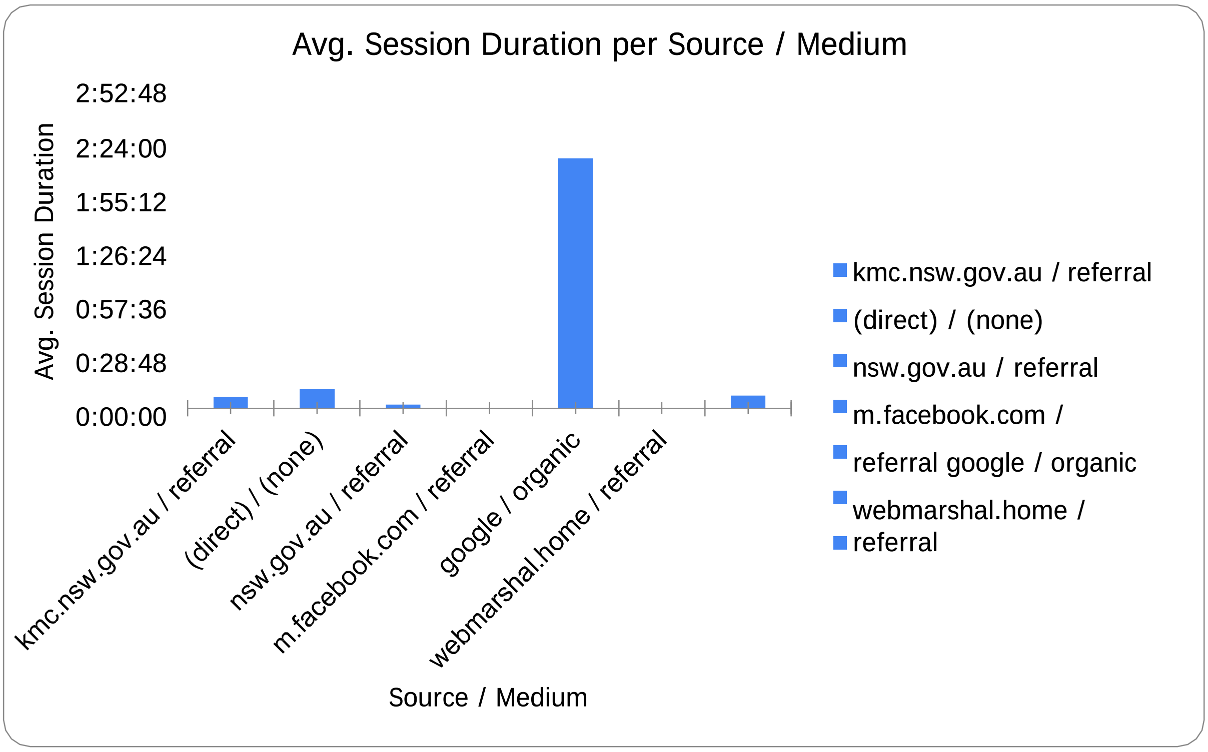
B Our Say Platform Analytics








Bounce Rate per Source / Medium
kmc.nsw.gov.au /
referral (direct) / (none)
nsw.gov.au / referral
m.facebook.com /
referral google / organic
webmarshal.home /
referral


Avg. Session Duration per Source / Medium
Avg. Session Duration
2:52:48
2:24:00
1:55:12
1:26:24
0:57:36
0:28:48
0:00:00
kmc.nsw.gov.au / referral
(direct) / (none)
nsw.gov.au / referral
m.facebook.com / referral
google / organic
webmarshal.home / referral
Source / Medium
kmc.nsw.gov.au / referral
(direct) / (none)
nsw.gov.au / referral
m.facebook.com /
referral google / organic
webmarshal.home /
referral

C Advertisement record

C-1 North Shore Times


Ku-ring-gai Council

Have your say on local housing

Ku-ring-gai Council is preparing a Housing Strategy. The Strategy will outline how we respond to growth and changing needs while protecting Ku-ring-gai's much-loved character.

Tell us about the type of housing you want and need over the next 20 years. Head to kmc.nsw.gov.au/**housingstrategy** to give feedback and complete a survey.

The survey closes at **9am on Monday 11 November 2019**. For more information, visit kmc.nsw.gov.au/**housingstrategy**, call 9424 0000 or email kmc@kmc.nsw.gov.au

6 Maytone Avenue KILLARA
DA0507/18 – Alterations and additions including pool, carport and associated works - heritage item

27 Memorial Avenue ST IVES
DA0508/18 – Demolition of existing structures and construction of a new administration and classroom building (including canteen), a new amenities building, tree removal and associated works - St Ives North Public School - Integrated Development (NSW Rural Fire Service under the RFS Act 1997)

52 Horace Street ST IVES
DA0552/18 – New carport, decks and associated works

Notice is given under Section 4.59 of the *Environmental Planning and Assessment Act 1979* of the granting of the above development consents. They are available for public inspection free of charge at the Council offices, 818 Pacific Highway Gordon, during business hours (8.30am-5pm).

Development applications under assessment

Submissions close 18 November 2019

Applicant: The Trustees of the Roman Catholic Church for the Diocese of Broken Bay, c/- Creative Planning Solutions Pty Ltd
Property: 76A Fiddens Wharf Road KILLARA
DA0401/19 – Consolidation of six existing lots and re-subdivide into two lots, construction of two permanent group homes on proposed Lot 2 and the retention of the existing Church on proposed Lot 1 and construction of a car park for the Church

Applicant: DEM (Aust) Pty Ltd
Property: 1 Garden Square GORDON
DA0420/19 – Partial demolition, alterations and

Request for tender - RFT 17-2019
Food & Beverage / Commercial Lease – 175 Rosedale Road, St Ives

Request for tender - RFT 18-2019
Playground Upgrade – Putarri Reserve

Request for tender - RFT 19-2019
Roseville Park Tennis Pavilion Construction

Interested parties are required to register via the E-Tendering Portal to download documents: tenderlink.com/**kmc**

Closes: 2pm AEDT 12 November 2019

Enquiries: Michael R MacLean 9424 0603 or tenders@kmc.nsw.gov.au

If you experience difficulties accessing the weblink, call the Tenderlink helpdesk on 1800 233 533.

Chemical CleanOut

Clean out your shed and cupboards and safely

C-2 Hornsby Advocate

Thursday, October 17, 2019 hornsbyadvocate.com.au | 09 NEWS

streetwatch

Police Assistance 131 444
If you are a victim of crime
Crime Stoppers 1800 333 000
If you have information on a crime

POLICE are appealing for witnesses to come forward after $10,000 in smart watches was stolen from the Apple Store at Westfield Hornsby earlier this month.

Released CCTV footage shows three male suspects entering the store at about 1.30pm on Wednesday, October 2, before grabbing 17 watches from the counter and running away.

Despite appearing identical to the real thing, the stolen items were only display models and have limited functionality.

Police believe the incident is linked to the theft of 12 smart watches from a store at a Charlestown shopping centre, near Newcastle, in September.

Members of the public are being asked to come forward with any information they have on the incident and have released CCTV images of three males who may be able to assist with their investigation. They are described as being of caucasian appearance and between 15-20 years old. Anyone with information about this incident is urged to contact Crime Stoppers on 1800 333 000 or nsw.crimestoppers.com.au.

TURRAMURRA
A 16-year-old male from Turramurra has been arrested and cautioned after he ran away from police on to the railway tracks near Turramurra Station. Police were patrolling railway stations along the North Shore line when they observed the teen walking along the rail platform. Upon seeing police, he ran on to the railway tracks and managed to evade them before later being spoken to and arrested and cautioned for entering running lines and breaching his bail conditions.

WAITARA
Police attending the residence of a 45-year-old male in Waitara have stumbled upon a number of growing cannabis plants. A further search of the property revealed more cannabis plants, cash and a large amount of prescription drugs. The man was charged with several offences including cultivate prohibited plant, possess/supply prohibited drug and resist officer. He will appear at court later this month.

TURRAMURRA
A 15-year-old male from Cherrybrook has been charged with assault and shoplifting after he attempted to steal a phone charger from the IGA at Turramurra Plaza. He is due to face court next month.

HAVE YOUR SAY
Ku-ring-gai's Housing Future
liveable for life

Ku-ring-gai Council is required by the NSW Government to undertake a Housing Strategy. This is to ensure we provide additional housing to meet the needs of Ku-ring-gai's current and future residents. The Housing Strategy will outline how we respond to growth and changing needs, while protecting and enhancing the much-loved Ku-ring-gai character. We want your input to help shape our future housing.

Tell us about the type of housing you want and need over the next 20 years, and what you think the wider community will need. Head to www.kmc.nsw.gov.au/housingstrategy **to provide your thoughts. Complete a survey to help guide Council's Housing Strategy. The survey closes at 9am on Monday 11 November 2019.**

Your feedback and information are important to us. It will help the Housing Strategy respond to the changing needs of our growing community and provide appropriate housing types at suitable locations.

Visit www.kmc.nsw.gov.au/housingstrategy, call (02) 9424 0000, or email kmc@kmc.nsw.gov.au

Thursday, October 17, 2019 HORNSBY ADVOCATE 09

C-3 The Vision China Times

C-4 The Vision China Times WeChat


9% 11:04 pm
外交政策工党讨论群 (247)
【住房部长】《首次置房者补助法》立法通过！明年元旦施行
参加在智利举行的 APEC 财长会议，视野更加开阔，
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


10% 11:05 pm
《大杂院》(322)
35 new messages
传奇萍姐帮三千福建人偷渡美国，在唐人街拥有极高声望
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:05 pm
经济政策工党讨论群 (378)
式关闭!! 这些景象再也看不到了......
为了39个死去的中国人，英国人流出了"白左"的眼泪
观点
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:06 pm
澳洲看中国分享群 (188)
澳中财富集团强势推介!!
500学生签证 ! 高成功率 !
快速获批 !
大学/中学/小学留学 !
专业申请澳洲八大名校 !
专业办理升学、转学申请 !
485毕业生工作签证 !
来自专业的持牌移民机构-澳中财富集团 !
电话咨询:+61-401200553
微信号: Jessie_Migration_Law
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11% 11:07 pm
生活在悉尼的常州人 (132)
这场快闪令人热泪盈眶，25位艺术家欢聚高歌《我和我的祖国》
784.7万人看过
Mini Programs
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


12% 11:08 pm
华人群友会 (386)
999 new messages
好女人是宠出来的
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:09 pm
悉尼互助平台 (304)
种育儿知识
999 new messages
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:
RH-货币管家
Contact Card
长期出澳币现金，悉尼面交！中国银行实时汇率，1w万 AUD起换！平时有小额换汇需求的可以加我自建换汇群，目前有近200悉尼本地朋友！


11:11 pm
吃喝玩乐一起，嗨 (200)
早晨好
为什么外国人更热衷于健身？
11:10 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:13 pm
吃喝玩乐嗨嗨嗨 (216)
999 new messages
11:12 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:13 pm
侨居澳洲-汽车 (187)
特朗普提前下台，美国将迎来首位华裔女总统？
10:09 PM
Emily
日本：一个被底层蝼蚁踩在脚下的超级巨国！
11:12 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:13 pm
澳洲华视之汽车群 (376)
999 new messages
A飞驰国际转运快递...
Contact Card
11:12 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:13 pm
成功者平台 (497)
999 new messages
10:43 PM
点亮双11
共度狂欢节
11:12 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


15% 11:13 pm
(手牵手)澳洲中国华侨公益群 (497)
为什么越有钱的人越相信风水？因为你的面相里藏着你的命
999 new messages
法解开你内心的困惑！别不信，识别下图二维码，准到吓人！
11:12 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


15% 11:13 pm
悉尼3 第一传...商业资讯群 (487)
999 new messages
4:42
10:46 PM
人过四十，莫管二事，人过五十，莫管二人，老祖宗的忠告
11:12 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


15% 11:13 pm
澳中时政自由聊 (376)
你的磁场，决定你的命
999 new messages
48岁韩红，如今几乎倾家荡产，值得每个人警醒！
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


15% 11:14 pm
悉尼吃喝玩乐购 (497)
清货～清货
945 new messages
二手 家具 家电
全套特价 可送货
冰箱 洗衣机 小家电
单人床 双人床 衣柜
书桌书柜 餐桌 椅子等
电话：0426076896
微信号加：gaoshengjian999999
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


15% 11:14 pm
悉尼信息发布群 (497)
清货～清货
999 new messages
二手 家具 家电
全套特价 可送货
冰箱 洗衣机 小家电
单人床 双人床 衣柜
书桌书柜 餐桌 椅子等
电话：0426076896
微信号加：gaoshengjian999999
11:12 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


16% 11:15 pm
澳洲中国东...同乡会悉尼 (386)
358 new messages
48岁的韩红，如今几乎倾家荡产
11:14 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:15 pm
澳洲中国东北同乡会悉尼 (362)
765 new messages
Mini Programs
Frank
南区700平米洗车行（带咖啡厅）出售——周服务400辆车以上
11:14 PM
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:


11:02 pm
共享好事(1群)互助,交友,资讯 (482)
都去了哪？！敢不敢给个交代！
Anna
澳媒曝！数千种澳洲食品有致癌风险！法国已封杀！超市看到这个...
@厚德载物【妙手推拿 正宗足底】说的太对了
说出您的想法. Kuringgai 市政府全新住房策略需要您的意见。扫一扫:

C-5 The Sydney Observer Magazine - advertisement

Local News

Movember for Men's Health

Isabella Ross

It is that time of year again – November, or better known as – Movember! The annual event predominantly involves men growing moustaches during this month, in order to raise awareness of men's health issues including prostate cancer and suicide. From humble beginnings in Australia, Movember has achieved a significant amount during its time. Resulting in approximately 6 million moustaches grown and 1,250 men's health programs funded internationality, Movember is at its peak. Prostate cancer is the most commonly diagnosed cancer amongst Aussie men, with one in six men diagnosed by the age of 85.

Women are also encouraged to get involved by committing to walking or running 60km over the month. As said by Movember spokesperson Samantha Mills, "you don't have to grow a mo to save a bro." 60km represents the 60 men we lose each hour around the globe due to suicide.

Jono Coleman is taking part this Movember.

Another pro note is that men need to start the month clean-shaven, so that everyone participating is on even footing. "It doesn't matter if your efforts are patchy, wispy, grey or bushy, just remember that this Movember, whatever you grow will save a bro", says Ms Mills.

One of our beloved national television personalities and North Shore local, Jono Coleman, will also be taking part in Movember after being diagnosed with prostate cancer in 2017. "I attempted a mo last year, but because of my treatment, it turned out to be little more than a few whiskers. However, you don't have to grow to save a bro, so this year I have chosen a less hairy way – I will fundraise my colleague Joe Hildebrand and I will move instead – walking – walking 60 kilometres throughout the month to raise money for men's health," Jono said to *Sydney Observer*. So get involved and raise awareness this Movember for an incredibly important cause.

MOVEMBER
Change the face of men's health

HAVE YOUR SAY

Ku-ring-gai's Housing Future

liveable for life

Ku-ring-gai Council

Ku-ring-gai Council is required by the NSW Government to undertake a Housing Strategy. This is to ensure we provide additional housing to meet the needs of Ku-ring-gai's current and future residents. The Housing Strategy will outline how we respond to growth and changing needs while protecting and enhancing the much-loved Ku-ring-gai character. We want your input to help shape our future housing.

Tell us about the type of housing you want and need over the next 20 years, and what you think the wider community will need.

Head to kmc.nsw.gov.au/housingstrategy to provide your thoughts. Complete a survey to help guide Council's Housing Strategy. The survey closes at 9am on Monday 11 November 2019.

Your feedback and information are important to us. It will help the Housing Strategy respond to the changing needs of our growing community and provide appropriate housing types at suitable locations.

Visit kmc.nsw.gov.au/housingstrategy, call (02) 9424 0000, or email kmc@kmc.nsw.gov.au

NOVEMBER 2019 | SYDNEYOBSERVER.COM.AU 9

C-6 The Sydney Observer Magazine – article

Local News

Ku-ring-gai Housing Strategy Consultations

Ku-ring-gai Council is calling for your advice! Community views and opinions are being sought after, in order to assist council in preparing a new housing strategy. The aim is to uncover housing needs for the local area's population, which is expected to rapidly grow over the next decade. Having an appropriate variety of housing types in Ku-ring-gai is also on the agenda.

To seek community advice, the council will be holding a range of surveys and online discussion forums over the next six months. The feedback will then help shape a draft housing strategy by early 2020.

The strategy will additionally outline where housing densities can be reasonably accommodated near public transport, the mix of housing types and how Ku-ring-gai's unique character can be protected.

Mayor Jennifer Anderson said all Sydney councils were being asked by the state government to prepare housing strategies that plan for future population increases across the city.

"The next 20 years will see Ku-ring-gai's population increase to over 150,000 from its current 123,000. We want to put together a plan to help manage this growth, while at the same time protecting the Ku-ring-gai that everyone loves. This is a shared challenge for the council and our community," Ms Anderson noted.

To find out more about the housing strategy and how you can give feedback, visit kmc.nsw.gov.au/housingstrategy

Privatisation of Buses Hits North Shore

Isabella Ross

To the frustration of the local community, the government has announced the privatisation of bus services in regions covering Sydney's lower North Shore, Northern Beaches, North-Western suburbs and Eastern suburbs. The decision has been seen as a betrayal to workers and the public. When looking at the success rate of bus services already privatised across Sydney, it is considerably grim in comparison to current state-run services. There has also been no guarantee from the government that current staff will have job security.

"We know privatisation doesn't work. Recent bus privatisation in the Inner-West has failed dismally. On-time running is down, routes have been cut, stops have closed, and workers' conditions have plummeted," Tram and Bus Division Secretary of the Rail, Tram and Bus Union (RTBU) NSW, David Babineau said.

NSW Transport Minister, Andrew Constance, has assured the public that Sydney Trains is not set to be privatised. However, it is difficult to assess the statement's validity, as only the future will tell.

"Commuters deserve to know their current routes and services are going to be protected, and bus drivers deserve to know their wages and conditions are also going to be protected. The onus is now on the NSW Government to show how it is going to protect workers' conditions as well as the world-class public service the people of Sydney deserve if it insists on continuing down this unjustifiable route," urged Mr Babineau.

10 NOVEMBER 2019 | SYDNEYOBSERVER.COM.AU

D Email Distribution Record

D-1 Email distributed to LSPS submitters and those who have requested updates

HPRM: Ku-ring-gai's Housing Future - Message (HTML)

Ann Morris on behalf of Antony Fabbro 'fyoty@bigpond.com'; 'hutcheson.john@bigpond.com'; + 75 15/10/20

HPRM: Ku-ring-gai's Housing Future

Dear Sir/Madam,

You are receiving this e-mail because you have recently made a submission to the *Draft Ku-ring-gai Local Strategic Planning Statement*, or previously indicated that you would like to receive information about Council's *Housing Strategy*.

We have now commenced work on our *Housing Strategy* in accordance with NSW Government requirements. The *Housing Strategy* will investigate housing provision over the next 20 years and outline how we respond to population growth and changing needs of our residents while protecting and enhancing the much-loved Ku-ring-gai character.

We want your input to help shape our future housing - tell us about the type of housing you want and need over the next 20 years, and what you think the wider community will need.

Head to **www.kmc.nsw.gov.au/housingstrategy** to provide your thoughts. Complete a Survey to help guide Council's Housing Strategy.

The Survey closes at 9amon Monday 11 November 2019.

Your feedback and information are important to us. It will help the Housing Strategy respond to the changing needs of our growing community and provide appropriate housing types at suitable locations.

For more information:

- visit www.kmc.nsw.gov.au/housingstrategy
- call (02) 9424 0000
- email kmc@kmc.nsw.gov.au

Regards
Antony

Antony Fabbro | Manager Urban Planning | Ku-ring-gai Council
P: 9424 0854 | M: 0438170423 | F: 9424 0001
E: afabbro@kmc.nsw.gov.au | www.kmc.nsw.gov.au
Ku-ring-gai: Sydney's green heart

D-2 Ku-ring-gai Library E-News

Ku-ring-gai's Housing Future

Ku-ring-gai Council

liveable for life

Ku-ring-gai Council is preparing a Housing Strategy as required by the NSW Government. The Strategy will outline how we protect Ku-ring-gai's much-loved character while responding to growth and our changing community needs.

Tell us about the type of housing you and the broader community will need over the next 20 years.

Head to our Have Your Say to complete a survey and participate in the online forum about this important issue by **9am Monday 11 November.**

Have your say

D-3 Ku-ring-gai E-News

Summer is almost here and it is time to start planning for the long school break, hot weather and end of year festivities. Read on to find out what is happening in Ku-ring-gai.

Latest news

Have your say

Ku-ring-gai's Housing Strategy

Ku-ring-gai Council is preparing a Housing Strategy as required by the NSW Government. The Strategy will outline how we protect Ku-ring-gai's much-loved character while responding to growth and our changing community needs.

Tell us about the type of housing you and the broader community will need over the next 20 years.

Head to our Have Your Say to complete a survey and participate in the online forum about this important issue by **9am Monday 11 November.**

Have your say

D-4 Ku-ring-gai Sustainability E-News

October edition

Welcome to the October edition of Sustainability E-news. Join a range of lifestyle workshops this October/November as we show you how to make your own plastic-free shampoo bars and useful ways to extend the life of your clothes. You can also get a head start on another hot summer and prepare a bushfire plan for your home and family.

You can also visit us on Facebook, Twitter and explore Envirotube.

Ku-ring-gai's Housing Strategy

Ku-ring-gai Council is preparing a Housing Strategy as required by the NSW Government. The Strategy will outline how we protect Ku-ring-gai's much-loved character while responding to growth and our changing community needs.

Tell us about the type of housing you and the broader community will need over the next 20 years.

Head to our Have Your Say to complete a survey and participate in the online forum about this important issue by **9am Monday 11 November.**

Have your say

D-5 Email distributed to LSPS submitters and survey respondents with Housing Strategy prompt

818 Pacific Highway, Gordon NSW 2072
Locked Bag 1006 Gordon NSW 2072
T 02 9424 0000 F 02 9424 0001
DX 8703 Gordon TTY 133 677
E kmc@kmc.nsw.gov.au
W www.kmc.nsw.gov.au

Ku-ring-gai Council

Contact: Urban Planning

Ref: S12396-1/2019/336659
6 November 2019

Via Email:

Dear Sir/Madam

Consideration of submissions – Local Strategic Planning Statement

Following exhibition, the report on the Local Strategic Planning Statement will be considered by Councillors at a Council meeting to be held on **Tuesday 19 November 2019.**

The report is contained in a Business Paper and you are able to view this document at Council's Customer Services, on Level 4 and on Council's website at "Your Council / Meetings / Minutes and agendas (business papers) – 2011 to present":
http://www.kmc.nsw.gov.au/Your_Council/Meetings/Minutes_and_agendas_business_papers_-_2011_to_present

Public Forum
If you wish to address Council on this item you must attend the Public Forum held on **Tuesday 12 November 2019**, commencing at 7pm. The Public Forum is held at the Council Chambers, Level 3, 818 Pacific Highway, Gordon. Parking is available behind Council Chambers, off Dumaresq Street.

Public who wish to speak will be required to register by 5pm the day before the Public Forum. Online registration form for the Public Forum is available on Councils website:
http://www.kmc.nsw.gov.au/Your_Council/Meetings/Council_Meetings_and_Public_Forums

Council Meeting
The Council meeting will be held on **Tuesday 19 November 2019**, commencing at 7pm. The meeting is to be held at the Council Chambers, Level 3, 818 Pacific Highway, Gordon. The Council meeting is open to the public, however there is no option to speak. Parking is available behind Council Chambers, off Dumaresq Street.

Housing Strategy
Ku-ring-gai Council is preparing a Housing Strategy to outline how we will meet residents' changing needs, and how we will manage future growth. Head to www.kmc.nsw.gov.au/housingstrategy to complete a survey and participate in the online forum by **9am Monday 11 November 2019.**

If you have any questions regarding this matter, please contact Urban Planning on 9424 0000.

Antony Fabbro

Manager Urban & Heritage Planning

E Facebook posts

E-1 Facebook post 1

E-1-1 Screenshots and comments

Ku-ring-gai Council

October 16

What kind of home will you need in 20 years? What will your children need?
We're required by State Government to develop a Housing Strategy to ensure housing supply meets our residents' future needs.
Learn more and complete a survey to help guide our Housing Strategy. Survey closes 9am 11 November: www.kmc.nsw.gov.au/housingstrategy

9 Comments
3 Shares

All Comments

Alfred M V Attard The housing strategy is terrible, the survey doesn't ask any serious questions, other than do you want a detached home, a unit, a town house.

How about the real needs of housing cost,number of members in a home, garaging, storage. ... See More

Like · Reply · 4w

Ku-ring-gai Council Thank you for your feedback. It has been passed onto the relevant department for consideration. You can also provide detailed input on our discussion forums: http://www.oursay.org/kmchousing/hopes-for-future-of-housing

Like · Reply · 4w

Corinne Julius Alter Alfred M V Attard agree!!!

Like · Reply · 4w

Kate Doherty Alfred M V Attard ditto!

Like · Reply · 4w

Jenni Dowzell Ku-ring-gai Council agree. So better volunteer to be on the forum for future discussion!

Like · Reply · 4w

Daniel Ben-Sefer Alfred M V Attard Agree! Questions seemed to be geared towards people wanted to MOVE to the area, not people LIVING in the area

Write a comment...

Ku-ring-gai Council Thank you for your feedback. It has been passed onto the relevant department for consideration. You can also provide detailed input on our discussion forums: http://www.oursay.org/kmchousing/hopes-for-future-of-housing

Like · Reply · 4w

Corinne Julius Alter Alfred M V Attard agree!!!

Like · Reply · 4w

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Like · Reply · 4w

Jenni Dowzell Ku-ring-gai Council agree. So better volunteer to be on the forum for future discussion!

Like · Reply · 4w

Daniel Ben-Sefer Alfred M V Attard Agree! Questions seemed to be geared towards people wanted to MOVE to the area, not people LIVING in the area

Like · Reply · 4w

Ku-ring-gai Council Daniel Ben-Sefer Thanks for your feedback. If you have any further comments on this please let us know via our discussion forums: http://www.oursay.org/kmchousing/hopes-for-future-of-housing

OURSAY.ORG
Your hopes for housing in...

Like · Reply · 3w

Write a reply...

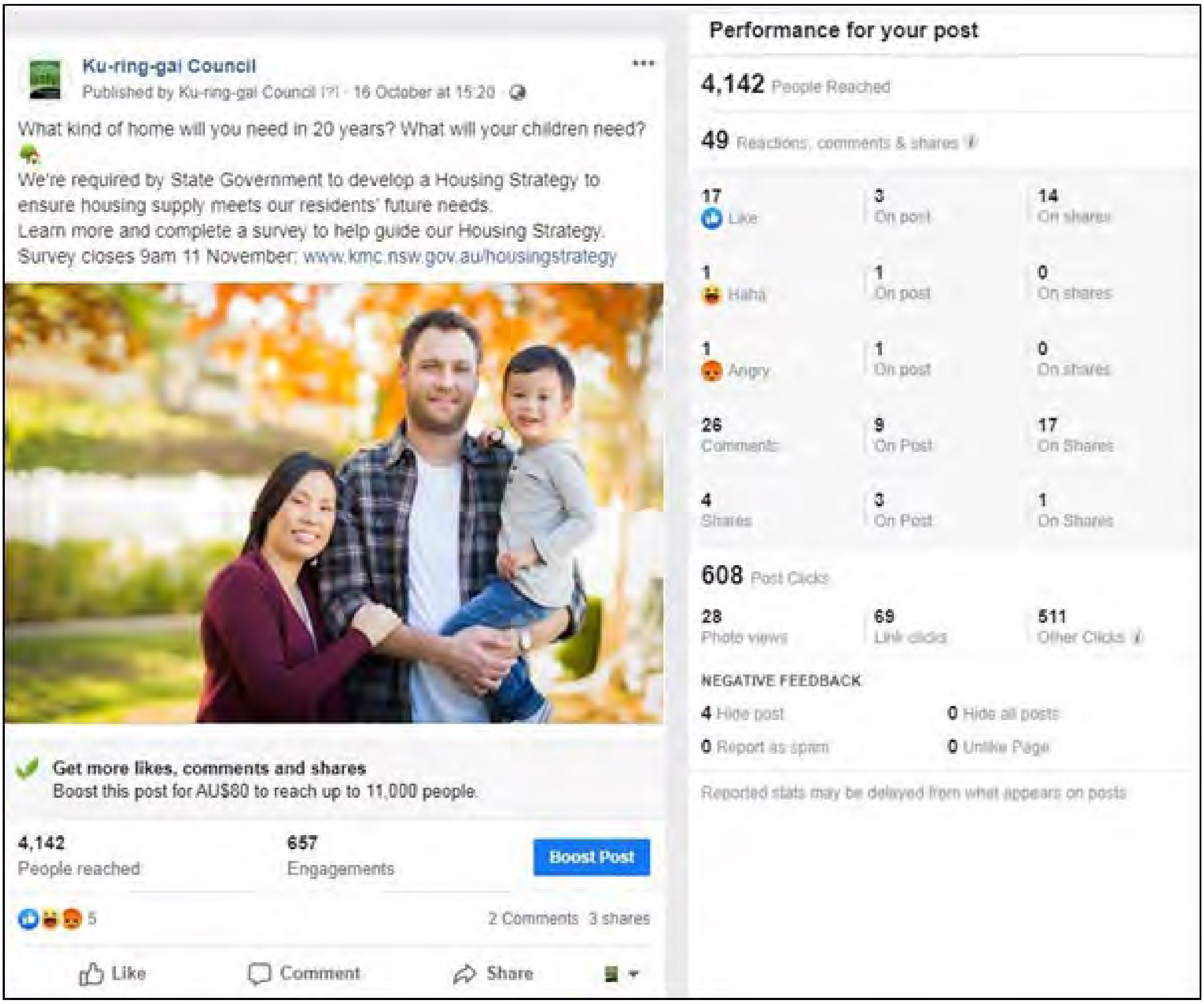
Mary Smallbone Is there a space available to say whst we DON'T want?

Like · Reply · 4w

Ku-ring-gai Council Hi Mary, you can provide this feedback on our discussion forums: http://www.oursay.org/kmchousing/hopes-for-future-of-housing

Like · Reply · 4w

E-1-2 **Post 1 Analytics**



E-2 Facebook Post 2

E-2-1 Screenshots and Comments

Ku-ring-gai Council
Like This Page · October 23 ·

What can Council do to make it easier for people to grow up, stay and grow old in our area?
Ku-ring-gai needs to develop a Housing Strategy to ensure housing supply meets our residents' future needs.
Complete a survey and participate in our online forums to help guide our Housing Strategy by 9am on 11 November.
Survey: http://bit.ly/Housingstrategysurvey
More info: www.kmc.nsw.gov.au/housingstrategy

35 · 3 Comments · 6 Shares

All Comments ▾

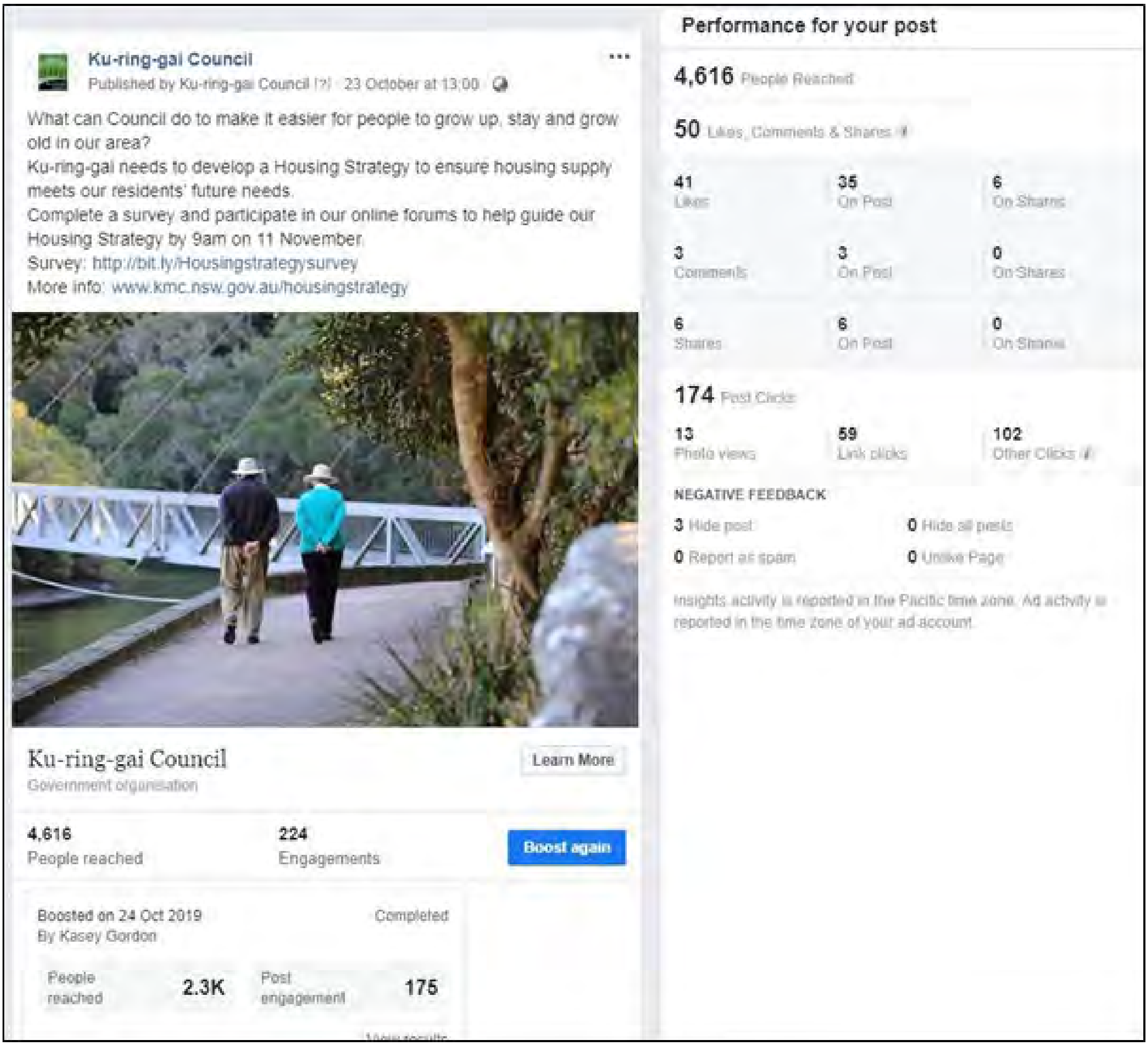
Harm Drenth Survey completed...thanks for asking,hope there is also some listening...😀
Like · Reply · 1w

John Gercken Then stop approving boarding houses and start approving more over 55s housing in The Forest as is appropriate for this area.
Like · Reply · 3w

> **Ku-ring-gai Council** Thanks for your comment John. We would like to understand your issues around boarding houses and over 55s housing, please give us your feedback on our discussion forum: www.oursay.org/kmchousing/housing-for-older-people
> Like · Reply · 2w

Write a comment...

E-2-2 **Post 2 Analytics**



E-3 Facebook Post 3

E-3-1 Screenshots and Comments


Ku-ring-gai Council
November 4

What size and type of housing will you need in the future?
Ku-ring-gai's Housing Strategy is looking at ways to improve local housing and give our current and future residents more housing choice.
Complete a survey and participate in the online forum to help guide our Strategy. Closes at 9am Monday 11 November.
www.kmc.nsw.gov.au/housingstrategy

5
14 Comments
3 Shares

Chris Parsons Higher building densities put a premium on floorspace which is a boon to developers and landlords.

It's why Hong Kong, for example, has some of the most expensive real estate in the world.

It doesn't help the environment much, either, the urban population still imposing its environmental footprint out into the world.

Like · Reply · 1w · Edited

Ku-ring-gai Council Thanks Chris. If you have any further comments on this topic please let us know via our discussion forums: http://www.oursay.org/kmchousing/hopes-for-future-of-housing

Like · Reply · 1w

Sandi Daley What size of GREEN SPACE is a more appropriate question!!
Stop the overdevelopment of Kuringai 😟

Like · Reply · 1w

Llynda Kay Sandi Daley well said.

Like · Reply · 1w

Ku-ring-gai Council Hi Sandi, your comments have been passed on. If you have any further to say on this topic please let us know via our discussion forums: http://www.oursay.org/kmchousing/hopes-for-future-of-housing

Like · Reply · 1w

Write a reply...

Sally Asnicar Complete the survey - it's your chance to have a say.

Like · Reply · 1w

Bill Haack Is the world approaching a population crisis?

Like · Reply · 1w

Katie Viviers Amanda Porter

Like · Reply · 1w

Patty Stone No more units or hideous mcmansions

Like · Reply · 1w · Edited

Write a comment...

E-3-2 **Post 3 Analytics**

Ku-ring-gai Council
Published by Ku-ring-gai Council (?) · 4 November at 11:23

What size and type of housing will you need in the future?
Ku-ring-gai's Housing Strategy is looking at ways to improve local housing and give our current and future residents more housing choice.
Complete a survey and participate in the online forum to help guide our Strategy. Closes at 9am Monday 11 November.
www.kmc.nsw.gov.au/housingstrategy

Ku-ring-gai Council
Government organisation
Learn More

4,399	265	
People reached	Engagements	Boost again

Boosted on 4 Nov 2019 — Completed
By Kasey Gordon

People reached	2.0K	Post engagement	96

View results

Performance for your post

4,399 People Reached

76 Reactions, comments & shares

53 Like	53 On post	0 On shares
2 Sad	2 On post	0 On shares
2 Angry	2 On post	0 On shares
16 Comments	14 On Post	2 On Shares
3 Shares	3 On Post	0 On Shares

189 Post Clicks

28 Photo views	58 Link clicks	103 Other Clicks

NEGATIVE FEEDBACK

3 Hide post	0 Hide all posts
0 Report as spam	0 Unlike Page

Insights activity is reported in the Pacific time zone. Ad activity is reported in the time zone of your ad account.

E-4 Facebook Post 4

E-4-1 Screenshots and Comments

Ku-ring-gai Council
November 8

Only two days left to have your say and help guide Ku-ring-gai's Housing Strategy!
We want Ku-ring-gai residents to have housing stability and maintain community connections, no matter what life throws their way. Council is developing a Housing Strategy to understand and address such needs.
Our survey and discussion forums close 9am Monday 11 November.
www.kmc.nsw.gov.au/housingstrategy

7

2 Comments
2 Shares

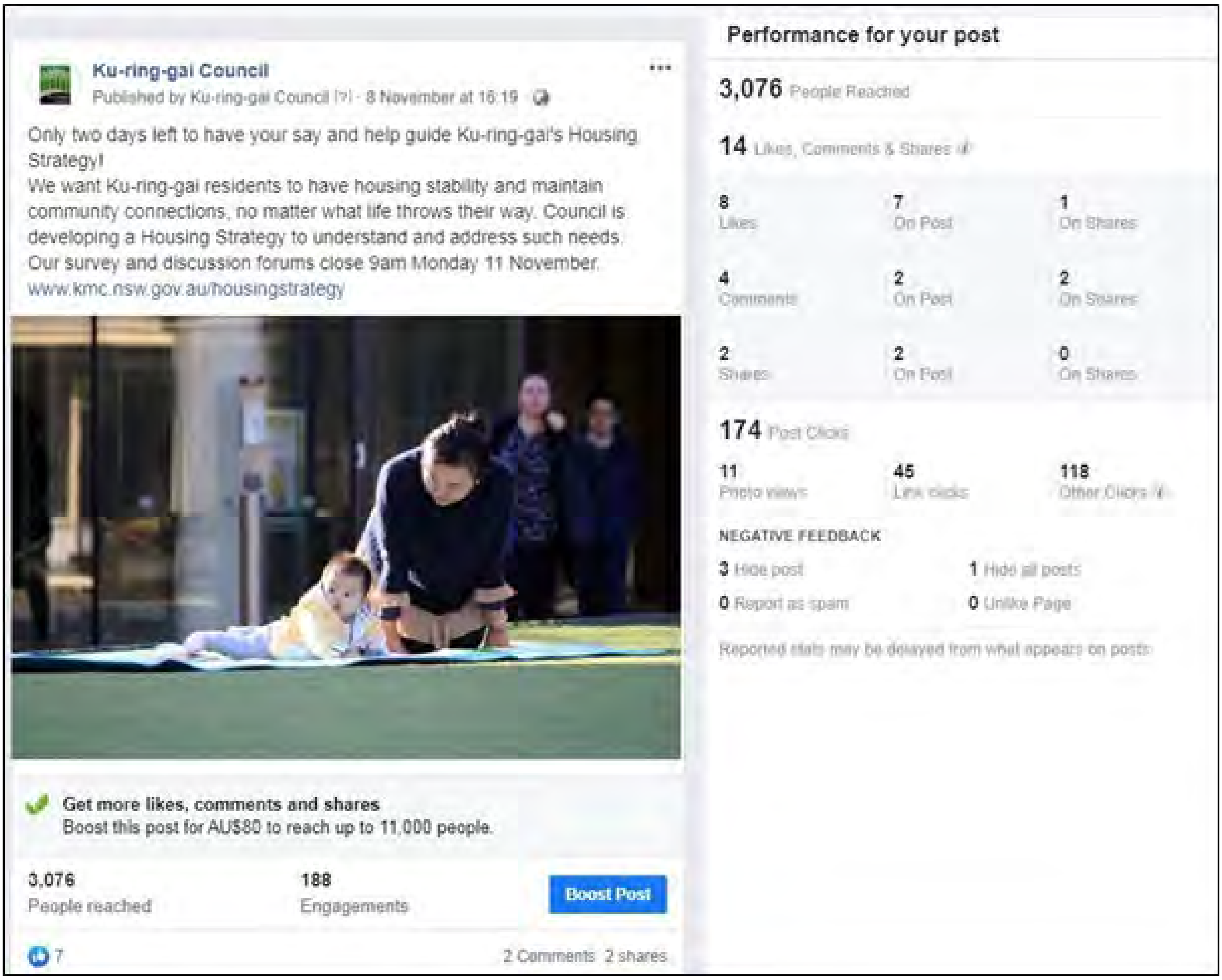
All Comments

Top Fan
Abhijeet Gautam Come on folks! Have your say if you want the value of your homes to continue rising !!
Like · Reply · 5d

Kerri Tresidder Phil Tresidder
Like · Reply · 4d

Write a comment...

E-4-2 **Post 4 Analytics**



F Facebook advertisement

G Photo Record of Collateral Distribution

Gordon Library

Lindfield Library

St Ives Library

Turramurra Library

Gordon Train Station

East Lindfield Community Hall

elton consulting

Ku-ring-gai Council Housing Needs Study 2016 - 2036

Exhibition Version March 2020

Client: Ku-ring-gai Council
Date: 28 February 2020

Contact:

Jacqui Salter
Jacqui.Salter@elton.com.au
02 9387 2600

SYDNEY02 9387 2600

Level 6, 332 - 342 Oxford Street Bondi Junction NSW 2022

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ABN 56 003 853 101

Prepared by	Alex Iping
Reviewed by	Jacqui Salter and Kim Samuels
Date	28 February 2020
Version	Exhibition version

Contents

FIGURES

TABLES

APPENDICES

1 Executive summary

All local government areas (LGAs) in NSW are required to prepare a Housing Strategy under the Local Environmental Plan (LEP) Review Process to meet the objectives of the broader District or Regional plans. This is given legal effect under Part 3 Division 3.1 Section 3.8 of the *Environmental Planning and Assessment Act 1979 (The Act)*.

Ku-ring-gai LGA is part of the North District and is subject to the North District Plan. Under the North District Plan, a Housing Strategy is required to be prepared. This Housing Needs Study has been prepared to inform the drafting of a Housing Strategy for the Ku-ring-gai LGA.

The purpose of the Housing Needs Study is to evaluate past trends and the components of expected population change to inform future housing need in Ku-ring-gai LGA, including housing typologies and locations. The following executive summary provides a brief overview of the key factors that have emerged from demographic and housing analysis, with further detail in the body of the report.

All past data utilised in the report is Australian Bureau of Statistics Census Data (2006, 2011, 2016) and Department of Planning, Industry and Environment Population Projections 2019 unless otherwise referenced.

Key trends in population change 2006 - 2016

The population in the Ku-ring-gai LGA grew from 104,450 to 122,472[1] during the 10-year period between 2006 – 2016 at an annual growth rate of 1.6% per annum. During this period, the key drivers of population change were inward migration from both overseas (approximately one third) and other parts of Australia to the Ku-ring-gai LGA (approximately two-thirds).

The greatest growth was in couple-with-children households (approximately 3,500) while growth in couple and lone-person households was much lower (approximately 1,500 and 900 respectively or 15) in the 2006 – 2016 period. Between 2006 – 2016, there were increases in families with one or two dependent children, with declines in families with greater numbers of children.

Most of the 65+ age bracket (5-year increments) also grew by 40%+ during the 2006 – 2016 period.

The greatest percentage of growth by age cohort was in young adults (25 – 34-years) in the 2006 - 2016 period (40%+). However, young adults are under-represented in the LGA compared to both the North District and Greater Sydney. Therefore, the growth in young adults began from a very low base and this age cohort remains significantly under-represented as a proportion of the population in the LGA as of 2016.

Projected population change 2016 – 2036 and structural age change

Lower growth rates are forecast by the Department of Planning, Infrastructure and Environment between 2016 – 2036, reducing from 1.6% per annum (2006 – 2016) to 0.95% per annum (2016 – 2036) in the Ku-ring-gai LGA. A key factor of slower growth is an expected reduction in net migration.

Structural age change has the potential to be a strong driver of dwelling demand. Over 14,400 additional people over 50 years in age are forecast to live in the LGA by 2036. Approximately 4,000 of these additional people will be over 80 years of age and are more likely to be in the frail category.

DPIE forecasts indicate that there will be approximately 10,500 additional households in the LGA by 2036. A growth of 5,500 lone and couple-only households between 2016 – 2036 is forecast. The vast proportion of these households will be older as there is little growth forecast in young adults. By 2036, forecasts predict that 42% of all households will be mainly older lone and couple households, while 45% will be couple with children. The remainder will largely be made up of other household types, such as one parent and multi-family households.

---

[1] DPIE Community Profile Tool

Department of Planning, Industry and Environment Implied Dwelling Requirements

Based on demographic analysis, the Department of Planning, Industry and Environment produce an implied dwelling requirement. It indicates that 10,660 additional dwellings would be required between 2016 to 2036. The Housing Needs Study tests this and assists to determine dwelling typology demand to provide the right mix of housing to meet the community's needs.

Average household size

Consistent with trends across Greater Sydney and the North District, average household sizes are forecast to reduce over the 2016 – 2036 period in Ku-ring-gai from 2.97 to 2.84. As previously outlined, the increased proportion of lone and couple households and a reduction of the dependents in households with children are factors in this reduction. This implies that even without population growth, there will be increased demand for dwellings.

Dwelling tenure

Owned-outright was the dominant tenure type in the LGA as at 2016. While the greatest proportion of owned-outright tenure was in separate dwellings, 23% of apartments 4-storey and above were owned-outright. This is a strong indicator of downsizing to this type of dwelling.

Separate dwellings and apartments 4-storey and above were dominant in owned-with-mortgage tenure types. This indicates both of these dwelling types are important sources of dwellings for purchase.

9% of dwellings were rental as of 2016. Separate dwellings and apartments 4-storey and above formed the vast majority of rental supply. Each of these dwelling types contributed approximately the same number of dwellings to the rental supply, despite separate dwellings accounting for approximately 73% of dwellings in the LGA. With limited opportunity to increase the supply of separate dwellings, smaller dwelling typologies are critical to maintaining rental supply. There is an extremely low supply of other tenure types in the LGA, such as social housing (39 dwellings).

Cost of housing

Data analysis showed that both non-strata and strata dwellings attracted higher prices than other North District LGAs. As of 2018, the Ku-ring-gai LGA had the highest median dwelling price in the North District, growing 86% since 2011. The significant rise in sales prices may mean that the proportion of owned-outright tenure types, primarily in older residents, will decline by 2036.

Median rental increases have been more moderate in Ku-ring-gai, growing by only 6% since 2011. This is likely due to increased apartment dwelling stock in the Ku-ring-gai market. The median apartment rental is lower than both neighbouring Willoughby and Northern Beaches LGAs, while the house median rental is higher. Rental of townhouses/villas/terraces attracts higher prices than the aforementioned LGAs, likely to be a result of a much lower proportion of this type of stock of this type in Ku-ring-gai, compared to others in the North District.

Household income

Median household income is higher in the Ku-ring-gai LGA than the North District and Greater Sydney. 12% of couple-with-children households have a household income lower than the Greater Sydney average.

For other household types outlined below, the percentage of households below the Greater Sydney median household income is much higher, and these household types may be more vulnerable to housing stress:

» 75% of lone-person households

» 37% of couple-only households

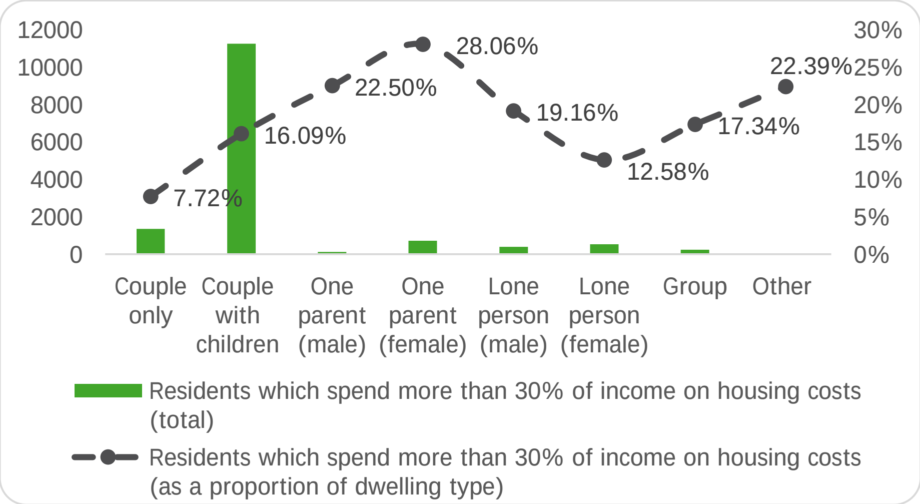
» 54% of one parent households

» 41% of group households and 57% of other households.

Housing stress and affordability

There has been an escalation of housing stress (mortgage and rental) in the Ku-ring-gai LGA, as defined by the NSW Affordable Housing Ministerial Guideline (73% increase between 2006 and 2016). Rental stress has nearly doubled over the same timeframe. 2,147 renting households in Ku-ring-gai LGA would likely be eligible for Affordable Housing under NSW Affordable Housing Ministerial Guidelines.

Affordability of housing is another key indicator, especially considering the very high prices of property in the Ku-ring-gai LGA and rent of separate dwelling. For the purposes on the Housing Needs Study this was defined by the ABS definition of housing stress where 30% of income is being spent on housing (i.e. relative to the household's income, not the Greater Sydney median household income). The following graph shows the numbers and household types experiencing housing affordability issues.



Other demographic groups that may be impacted by housing affordability concerns in the LGA include the ageing population, Culturally and Linguistically Diverse (CALD) people and Aboriginal and Torres Strait Islander (ABTSI) people.

Further investigation into housing affordability revealed that as of 2016:

» The 55-64-year cohort is experiencing much greater levels of affordability problems than the 65+ age range. This is likely indicative of future trends. In this age bracket, households are likely to not be able to recover from housing stress or unaffordability and, in the Ku-ring-gai LGA context, this could result in more people downsizing. Housing unaffordability in this cohort is more prevalent in female residents than male.

» Female-head, one parent households are the most likely to have housing affordability concerns, and are more likely to live in apartments. The number of one parent households that occupy apartments 4-storey and above rose significantly in the 2006 – 2016 period (900% growth), whereas the number occupying single dwellings declined. The number of apartments needed to meet the needs of this household type is likely to escalate.

» While couples with children experience a relatively low rate of unaffordability (16% of residents in this household type), this represents the largest number of residents by household type experiencing unaffordability. This may indicate there is a need for more affordable types of dwelling stock for couples with children. There has been a significant rise in couples with children living in apartments 4-storey and above, with particularly notable corresponding rise in 0-4-year olds. This suggests this is an increasingly important source of housing for starting out families. The trend with regards to these children remaining in apartments is uncertain at this stage as it may be related to the availability of that type of stock in the Ku-ring-gai market (i.e. greater production post-2011). The rise in apartment living may also indicate that other intermediary stock is needed for families, such as townhouses, if and where they can be delivered reasonably cost-effectively.

» CALD residents are more likely to experience housing affordability concerns. For those that speak English well, 33% or residents experience housing affordability problems but this rises to around 38% when there is a lack of English proficiency. Most of the latter live in larger-scale apartment complexes, generally in the south of the LGA or St Ives.

» Aboriginal and Torres Strait Islander people have a very low representation in the Ku-ring-gai population but median household income for this group was well above the median for the LGA. Housing affordability does not appear to impact the ABTSI people living in Ku-ring-gai as of 2016.

Key worker profile

There is a low rate of unemployment of 4.6% in the Ku-ring-gai LGA. Most resident workers are employed in professional and technical services industries, health care and social assistance, finance and insurance and education.

Key worker industries are considered essential to the function and needs of the local community. The largest employment industries within the Ku-ring-gai LGA are health care and social assistance and education, both considered key-worker intensive industries. As of 2016, 32% of workers in healthcare and social assistance and 38% of education workers, live in the LGA. Another key worker industry, but of less of an employer within Ku-ring-gai, is public administration and safety.

Significant numbers of key workers travel from outside the North District to Ku-ring-gai to work in these industries. Many of them are on very low to low incomes (less than $52,000 per year). The vast majority of these workers would likely be eligible for Affordable Housing under the NSW Affordable Housing Ministerial Guidelines. Many moderate-income worker (less than $104,000 per year) may also be eligible, depending on their particular circumstances.

The long-distances travelled by key workers (outside the North District), may increasingly be a barrier to attracting these key workers to employment in the Ku-ring-gai LGA. It is estimated that a likely minimum of 2,000 key workers could be eligible for Affordable Housing (earning less than $52k per annum), with the potential for up to a further 3,000+ workers eligible on moderate incomes (up to $104k per annum).

Analysis of housing stock and housing choice in the LGA – dwelling structure and bedrooms

As of 2016, the dominant dwelling type in the Ku-ring-gai LGA was by far separate dwellings (approximately 73%). This is significantly greater percentage than either the North District (53%) and Greater Sydney (54%). The Hornsby LGA had a similar proportion of separate dwellings but all other North District LGAs had a lower proportion of these dwelling types.

Ku-ring-gai's housing stock had a very small proportion of terrace/townhouses/villas (approximately 4%) compared to the North District (10%) and Greater Sydney (14%) as of 2016.

Approximately 23% of dwellings in Ku-ring-gai were apartment stock as of 2016. Approximately 14% of housing stock was apartments 4-storey and above, generally the more recently developed homes. The North District had 37% apartment stock while Greater Sydney had 31%, both much higher than the Ku-ring-gai LGA.

The impact of lower levels of townhouse/terrace/villa stock was investigated in the Housing Needs Study. It showed the following.

- A greater proportion of townhouse/terrace/villa stock is inhabited by older people, compared to younger cohorts. As at 2016, only 20% of townhouses 2-storey and above were inhabited by couple with children households, with a much lower proportion in 1-storey semi-detached.
- Due to the very low percentage of townhouse/terrace/villa type stock (4% of all market housing stock), there is likely an under-representation of all ages and household types in this type of stock and therefore, more difficult to determine trends.
- Between 2006 to 2016, the greatest increases were in 2-bedroom (4.45%) and 5-bedroom stock (1.83%). There was a decline in the proportion of three and four-bedroom stock. There were minimal increases in the percentage of 1-bedroom stock (1.64%). It would appear that more intermediary stock for families (3/4 bedroom) is likely required, considering affordability and declining numbers of dependent children.
- There is significant under-occupancy in the LGA with 16,000 separate dwellings having an under-occupancy of 2 or more bedrooms as of 2016. This is over half of all separate dwellings. 89% of separate dwellings had one or more bedrooms spare. With the very low stock availability of terrace/townhouses/villas, there may be significant unmet demand if this typology of stock it more suited to people's needs or desires, particularly among the ageing population.

Analysis of trends of people living in dwelling typologies

The key outcomes of the analysis of trends in people living in particular dwelling typologies include:

» The proportion of every age range residing in single dwellings fell between 2006 – 2016, with the exception of 25 – 29 year olds (possibly due to staying at home longer) and the 80 plus cohort.

» Analysis showed that of the approximate 3,500 additional couple-with-children households residing in Ku-ring-gai between 2006 – 2016, only 200 additional separate dwellings were occupied with this household type. This would indicate that other dwelling types are increasingly important for couples with children.

» There was 700 – 1000% proportional growth in young adults (depending on the specific 5-year age range) living in apartments 4-storey and above. This indicates this form of housing has become an important source of residential accommodation for young adults and may have significantly contributed to the 40%+ growth in the 25 – 34-year old age range between 2006 – 2016.

» There is a corresponding peak of 0-4-year old children living in apartments 4 storey and above. This would indicate that this typology is of increasing importance to young, starting-out families. It is more difficult to determine the trend for primary age children as this may be a factor of when the stock was developed and therefore, the long term trends are not clear.

» There was 600% growth in most age ranges above 50 years occupying apartments 4-storeys and above, indicating that people in older age ranges are choosing this type of stock. This is quite different to lower-scale apartments, which have lower proportions of the 50 – 70 age range, then peaks above this range. This indicates that younger cohorts in the ageing population are choosing this type of housing stock earlier than their older counterparts. There is evidence that mortgage stress is also increasing in younger cohorts in the ageing population (55 – 64 years), which may increase the downsizing trend.

» There was a 900% increase in the number of one parent households residing in apartments 4-storey and above, with a decline of 200 households of this type living in separate dwellings between 2006 – 2016. This household type is generally impacted by housing affordability concerns more than other household types. This is likely to indicate an escalating trend to apartment living by this household type.

Housing demand assessment

Growth is projected to slow in Ku-ring-gai between 2016 -2036 to approximately 66% of the rate of the 2006 – 2016 period with net migration declining in influence on dwelling demand. Structural age change factors will be increasingly influential, while other household types were also considered in the Housing Needs Study. The Housing Needs Study does not assess the feasibility of the delivery of any particular typology and these factors may have to moderate the housing mix. Feasibility is dependent on land values at specific locations.

Apartment dwellings

The following provides a summary of the housing need for apartment stock and the key factors that have informed the housing need calculation.

» There has been a 600% growth in the proportion of people over 50 occupying apartments (4-storey and above) between 2006 – 2016, albeit from a low base.

» Housing affordability issues appear to be increasingly prominent in the older population particularly at the younger end of the cohort potentially prompting an escalation of downsizing to more affordable options.

» ***To support the ageing population at a much more conservative growth rate (3% per annum), the findings of the Housing Needs Study found 3,820 additional apartments would be required.***

» There is a very low proportion of young adults in Ku-ring-gai compared to the North District and Greater Sydney. There has been growth of young adults in the LGA between 2006 – 2016 (40%+), likely driven by the availability of apartments (4-storey and above). It also found that this form of dwelling is an important source of housing for young starting out families with 0-4-year-olds also represented in this typology of housing stock.

- The Housing Needs Study has found that the production of apartment dwellings in Ku-ring-gai has likely had a stabilising effect on rents compared to other LGA's in the North District. This is may have contributed to growth in young adults living in the LGA.
- ***To continue to support the proportion of young adults in Ku-ring-gai, the Housing Needs Study found that 900 – 1000 additional apartments for this cohort would be required.***
- There is a forecast rise in one parent households to 2036. 2006 – 2016 data shows a decline in this household type living in single dwellings and a rise in apartment living by these families (900% growth 2006 – 2016). Housing unaffordability is shown to be more prevalent for these families.
- ***To support one parent families to 2036, the Housing Needs Study suggested approximately 1,000 additional apartments are required for this household type.***

Townhouse/terrace/villa dwellings

The following provides a summary of the housing need for townhouse/terrace/villa stock and the key factors that have informed the housing need calculation.

There is a very low percentage of housing stock of this typology in the LGA compared to the North District and Greater Sydney (4% of housing stock in the Ku-ring-gai LGA), which makes trends more difficult to determine. However, the key conclusions were:

- There is a likely need for semi-detached/townhouse/attached as an intermediary type of housing for couples with children. Couples with children are forecast to grow by 3,455 households in Ku-ring-gai between 2016 – 2036, a similar increase as the 2006 – 2016 period, although approximately half the growth rate. Between 2006 – 2016, despite the growth in this household type, only approximately 200 additional detached single dwellings were being occupied by that household type. Therefore, other smaller forms of dwellings are becoming increasingly important.
- In 2016, 20% semi-detached 2-storey and above dwellings were occupied by couples with children but the dwelling stock is dominated by older age groups. To maintain the proportion of household representation, approximately 700 additional dwellings of this type would be required. However, due to the low availability of stock, this household type is likely under-represented in this typology and further stock should be provided.
- The Housing Needs Study recommends increases provision of semi-detached/terrace/townhouse/attached to assist with availability for households with children (1400 + dwellings attributed to support this cohort)
- Older persons are highly represented in townhouse/terrace/villa typologies, indicating a preference for this type of stock.
- Downsizing rates across Greater Sydney are generally 35-45% or more in Greater Sydney, premised on the desired dwellings being available.
- With the desired stock available, the preliminary findings of the Housing Needs Study, suggests an additional 15% of over 55 households may downsize if desired stock were available. 3,600 of townhouses/terraces/dual occupancies would be required to fulfil this market gap.
- It is a recommendation that this is tested with the community and among other stakeholders.

Housing Need Study findings and comparison with DPIE implied dwelling requirements

The table below summarises the findings of the Housing Need Study for market housing in comparison to the Department of Planning, Industry and Environment forecast of implied dwellings required.

Summary of dwelling demand

Housing need by typology by demographic	Number	Percentage of total by typology	Total
Apartments (young adult/beginning families)	909	54%	5,733
Apartments (ageing population)	3,820		
Apartments (one parent)	1,004		
Semi-detached/terrace/villa/dual occupancy (ageing population)	3,609	46%	4,971
Semi-detached/terrace/villa/dual occupancy (couples with children)	1,362		
Housing need total (2016 – 2036)			10,704
Note: Feasibility testing has not been conducted as part of the Housing Needs Study which may moderate the types of housing able to be delivered. This will depend on land values in certain locations.			
Department of Planning, Industry & Environment Implied Dwelling Projections (2016 – 2036)			10,660

Non-market housing demand

Demand in aged care

While the health of older Australians is improving based on life expectancy data[2], there will be a significant rise in the over 80s age group by 2036 in the Ku-ring-gai LGA. Therefore, improvements in health and independence of older residents may be offset by the high volume of people in the frail category.

Therefore, the Housing Needs Study has used a direct correlation approach to assess the need additional aged care services. As at 2016, 4.5% of the over 65-years population was in aged care services. This percentage has been applied to the forecast number of people over 65 years.

This results in 387 additional aged care places being required by 2036.

Residents and key workers likely to be eligible for Affordable Housing

The following table provides a breakdown of residents and key workers likely eligible for Affordable Housing under the NSW Affordable Housing Ministerial Directions.

Estimated number of households likely eligible for Affordable Housing	
Estimated minimum eligible households for Affordable Housing – those in housing rental stress in the LGA, key workers living outside the North District earning less than $52,000 and estimate of homelessness	4,082
Estimated maximum eligible households for Affordable Housing – those in housing rental stress plus mortgage stress over 55s in LGA, key workers living outside the North District earning less than $104,000 per annum and homelessness	7,843

[2] Australian Institute of Health and Welfare, https://www.aihw.gov.au/reports/life-expectancy-death/deaths-in-australia/contents/life-expectancy

2 Introduction and purpose

All local government areas (LGAs) in NSW are required to prepare a Housing Strategy under the Local Environmental Plan (LEP) Review Process to meet the objectives of the broader District or Regional plans. This is given legal effect under Part 3 Division 3.1 Section 3.8 of the *Environmental Planning and Assessment Act 1979 (The Act)*.Under the Act, as soon as practicable after a District Strategic Plan is made, the council for each LGA in the District to which the Plan applies must review the LEPs for the area and prepare such planning proposals under Section 3.33 as are necessary to give effect to the District Strategic Plan.

The purpose of the Housing Strategy is to ensure that appropriate numbers and typologies of dwellings are delivered over the 2016 – 2036 period, with 5-year review periods. Ku-ring-gai LGA is part of the North District and is subject to the North District Plan. Under the North District Plan, a Housing Strategy is required to be prepared. This Housing Needs Study has been prepared to inform the drafting of a Housing Strategy for the Ku-ring-gai LGA.

The intent of the Housing Needs Study is to evaluate past trends and the components of expected population change to evaluate future housing needs in the area, including housing typologies. Both market and non-market housing[3] needs are considered.. The Housing Needs Study, combined with other evidence such as the outcomes of community consultation, dwelling capacity, feasibility analysis and other factors, will inform the development of the Ku-ring-gai Housing Strategy.

The purpose of this Housing Needs Study is to:

» Critically review past trends in population growth and change and housing choice in the LGA and consider the implications for future housing delivery. For this House Needs Study, trends in various cohorts have been examined to understand future implications. These cohorts include:
  > The ageing population
  > Young adults
  > Family households with children, including one parent households
  > The Culturally and Linguistically Diverse community
  > Aboriginal and Torres Strait Islander population.
» Analyse the implications and drivers of forecast population change estimated by the Department of the Planning, Industry and Environment (DPIE), particularly considering structural age change in the population and changes in household types, and consider the implications for housing delivery in the LGA.
» Consider the evidence in terms of income and housing stress being experienced by residents in the LGA and make reasoned assumptions that may influence future housing demand.
» Consider the key worker population that work in Ku-ring-gai and live outside the LGA that may be eligible for Affordable Housing.
» Determine the mix of market housing that would be considered optimal and make any locational recommendations based on the data evidence and from spatial mapping.
» Assess the likely demand for non-market housing.
» Assess the above aspects against housing supply and make recommendations for future delivery. To effectively analyse understand some of the above data, comparisons are made between Ku-ring-gai and other North District LGAs including Northern Beaches, Mosman, North Sydney, Willoughby, Hornsby, Hunters Hill, Lane Cove and Willoughby as well as Greater Sydney, where appropriate.

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[3] Non-market housing is defined as Affordable Housing as defined by the NSW Affordable Housing Ministerial Guideline and other forms of residential accommodation such as aged care or boarding houses.

3 Current population, previous trends and forecast change

Summary and key implications for the Housing Needs Study

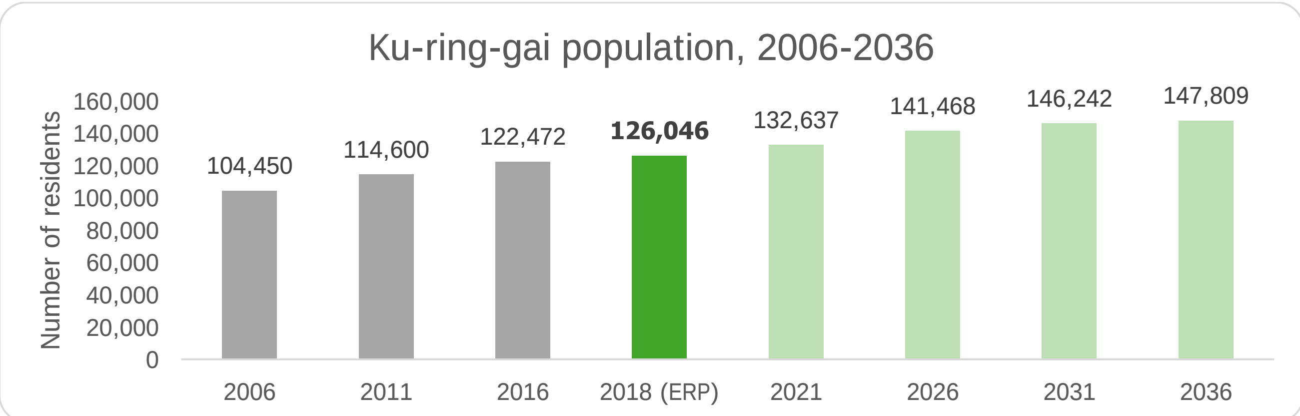
- The Ku-ring-gai LGA is expected to have a slower population growth rate between 2016 – 2036 than experienced between 2006 – 2016.
- The drivers of slowing growth need to be understood. However, structural changes in population age and household type also need to examined to ensure housing meets future needs.
- There is an expected shift in the LGAs that experienced the most growth in the 2006 – 2016 period in the North District from LGAs such as the Northern Beaches to Ryde. Ku-ring-gai, in comparison, is forecast to experience moderate growth.

3.1 Number of people living in Ku-ring-gai and forecast growth

3.1.1 Ku-ring-gai population trends

In 2018, the estimated resident population of Ku-ring-gai was 126,046. Between 2006-2016 (the two relevant Census years to assist in determining past trends), the Ku-ring-gai population steadily increased by a total of 18,022 additional residents, representing an approximate 17% population increase[4]. The Housing Strategy that this Housing Needs Study will inform, is for the period between 2016 and 2036 in which there is a forecast change of 25,337[5] residents, or approximately 0.95% growth rate per annum. See **Figure 1.**

Figure 1 Population change from 2006 – 2018 and project population change to 2036.



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019) and ABS - Estimated Resident Population (2006, 2018)

Note: Estimated Resident Population (ERP)

[4] DPIE Community Profile Tool and DPIE (2019), NSW 2019 Population Projections. It should be noted that there is conflicting data between these two sources on the 2016 Estimated Usual Residents. The latest data source (2019) has been utilised.
[5] DPIE (2019), NSW 2019 Population Projections

3.1.2 Comparison to the North District and Greater Sydney

Between 2006 and 2016, the Ku-ring-gai LGA grew at a slower rate compared to Greater Sydney (17.24% and 18.06% respectively) but had more growth than the North District (17.24% compared to 14.65% respectively). This trend is expected to reverse in the 2006 – 2016 period, with Ku-ring-gai growing at a rate slightly below the North District average. See **Table 1**.

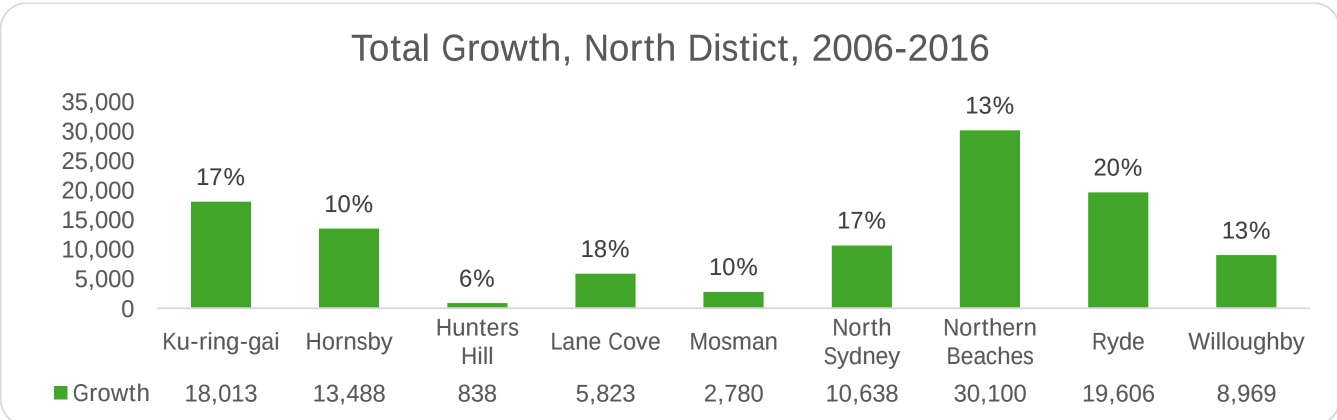
Table 1 Estimated and projected resident population

Estimated Population				**2006 - 2016**		
Area	2006	2011	2016	Total Change		Average Annual Growth
				No.	%	
Ku-ring-gai	104,450	114,600	122,472	18,022	17	1.6%
North District	775,300	832,750	886,600	111,300	14	1.4%
Greater Sydney	3,953,050	4,286,200	4,681,950	728,900	18	1.7%
Projected Population				**2016-2036**		
Area	2016	2026	2036	Total Change		Average Annual Growth
				No.	%	
Ku-ring-gai	122,472	141,468	147,809	25,337	21	0.95%
North District	888,902	1,008,695	1,092,885	203,983	23	1.0%
Greater Sydney	4,681,950	5,537,850	6,421,850	1,739,900	27	1.6%

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019) and ABS – Estimated Resident Population

Compared to other LGAs in the North District, the Ku-ring-gai LGA has experienced the third highest population increase between 2006 and 2016, a total increase of 18,022 additional residents. The Northern Beaches LGA experienced the greatest population growth over this period, with an additional 30,100 residents. This is substantially higher than any other LGA in the North District. As a percentage of growth, Ku-ring-gai had the third highest percentage growth, behind Ryde and Lane Cove, and on a par with North Sydney. This is shown in **Figure 2.**

Figure 2 North District Total Growth 2006-2016



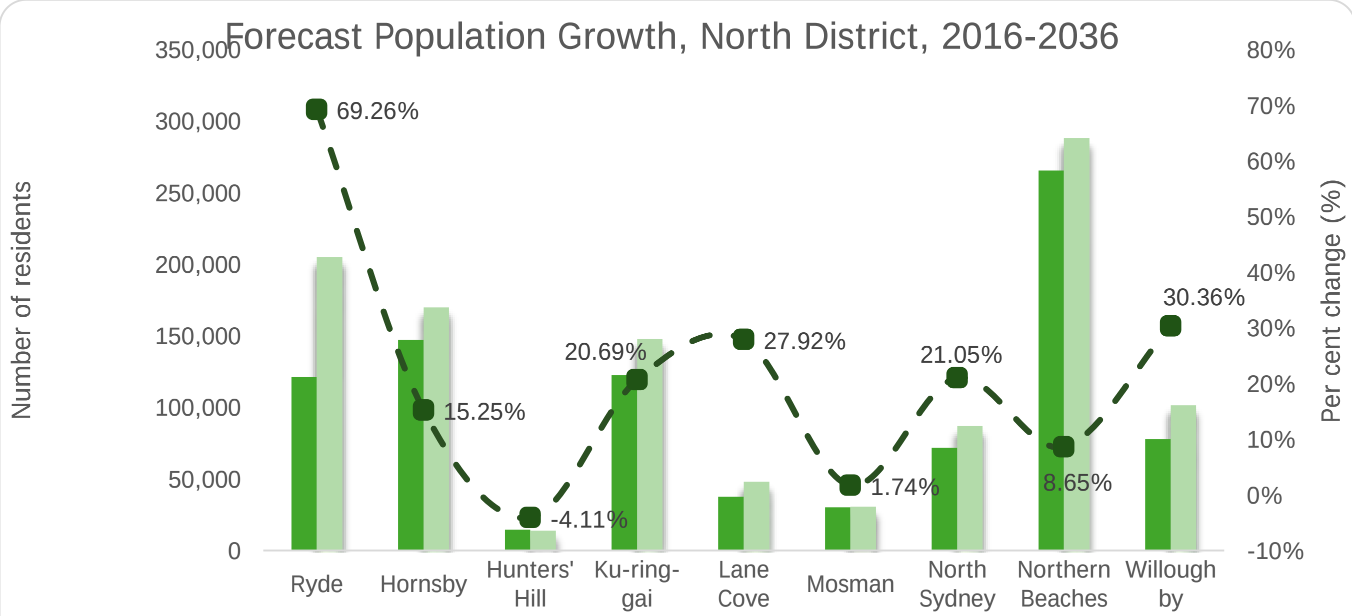
Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2016) and ABS Estimated Resident Population (2006) NOTE: It should be noted that there are sometimes mismatches between ABS data and DPIE population figures for 2016. DPIE sources are used where available for consistency.

By 2036, the resident population of the Ku-ring-gai LGA is expected to reach 147,809, an additional 25,337 people. This represents a 21% population increase between 2016 and 2036, which will make it the fourth largest growth LGA in the North District.

The Ryde LGA is expected to experience the greatest relative growth in the North District (69%). Areas such as Hunters Hill, Mosman and the Northern Beaches LGAs are expected to experience the least relative population change. In the case of the Northern Beaches LGA, it is anticipated to continue to be the LGA with the largest population in the North District by 2036, despite having a relatively low growth rate.

Ku-ring-gai is expected to maintain a relatively high proportion of population increase in the North District. See **Figure 3.** However, as can be seen in **Figure 4**, the rate of growth is forecast to decline over the 2016 – 2036 period.

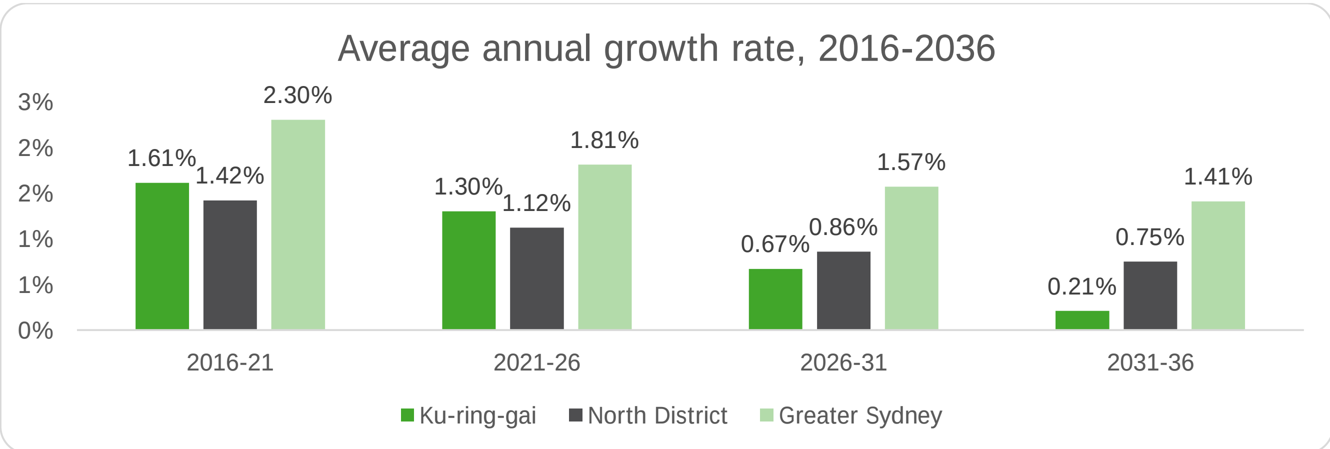
Figure 3 North District Forecast Population growth, 2016-2036



	Ryde	Hornsby	Hunters' Hill	Ku-ring-gai	Lane Cove	Mosman	North Sydney	Northern Beaches	Willough by
2016	121,270	147,385	14,656	122,472	37,694	30,260	71,809	265,468	77,888
2036	205,257	169,855	14,054	147,809	48,218	30,786	86,923	288,431	101,536
% change	69.26%	15.25%	-4.11%	20.69%	27.92%	1.74%	21.05%	8.65%	30.36%

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

Figure 4 Comparison of previous and projected annual growth rates between Ku-ring-gai the North District and Greater Sydney



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

3.2 Trends and future drivers of population change in the Ku-ring-gai LGA

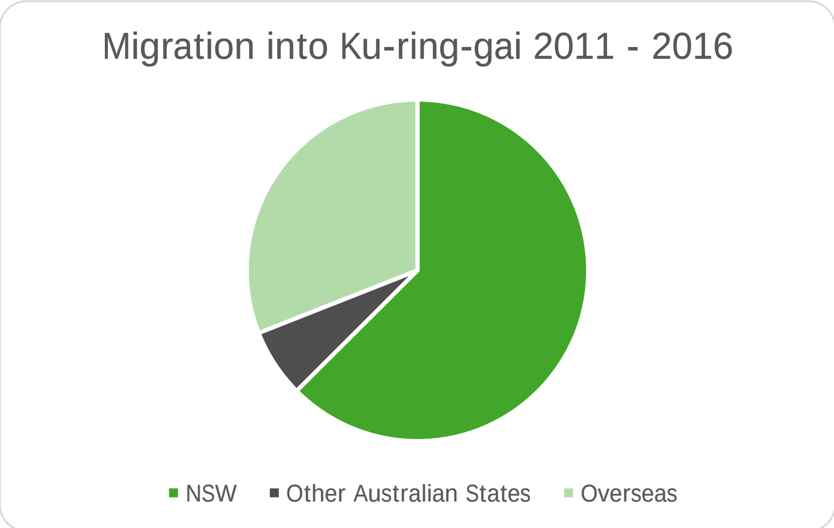
Summary and implications for the Housing Needs Study

- Inward migration, both from overseas (approximately one-third of change from 2011-2016) and from other parts of Australia (approximately two-thirds of population change 2011-2016), have been key dynamics in population change in the Ku-ring-gai LGA.
- There is expected to be a declining net migration influence in the Ku-ring-gai LGA between 2016 – 2036. However, the net inward migration is expected to remain relatively strong until post 2026. Therefore, understanding the dwelling choices of people migrating to the LGA remains essential.
- For overseas migrants to the LGA, there is generally an equal split in the housing preference between separate dwellings and apartments. For migration to the LGA from other parts of Australia, there is a slight preference for separate dwellings (approximately 57%) compared to apartments (43%), but not remarkably different to inward migration from overseas.
- Inward migration from overseas, based on the mapping, has a slightly higher preference for dwellings at the southern end of the LGA, whereas from other parts of Australia there is a slight preference for northern parts of the LGA.
- The migration to intermediary dwelling types, such as townhouses, has not been assessed as the percentage of stock is very low and unlikely representative of trends.

Sources of inward migration

Ku-ring-gai LGA has experienced a high level of inward migration from other LGAs in Australia between 2006 – 2016 (approximately 69% of all inward migration), double the nearest driver of population change from overseas migration (approximately 31%). See **Figure 5.** Of the people that live in in Ku-ring-gai as of the 2016 Census, 60% are Australian born, while a further 21% arrived prior to the year 2000.

Figure 5 Migration into Ku-ring-gai 2011-2016



ABS, 2016 Census

Source: ABS –TableBuilder Pro, 2016, variables LGA (UR), STATE (5YRS), 'Ku-ring-gai (A)' (accessed December 2019)

Note: New South Wales has been calculated so it only includes residents who moved into the Ku-ring-gai LGA over the last 5 years not those that moved within the LGA to a different address.

Approximately 19% arrived from overseas post 2000. In 2016, approximately 60% of residents were born in Australia, with China (excludes SARs[6] and Taiwan) representing 7.1% and England closely behind at 5.7%. There is a peak of inward migration from overseas in the 2010 – 2014 period and exhibiting a marginal slowdown in the 2015/16 period as outlined in **Table 2.**

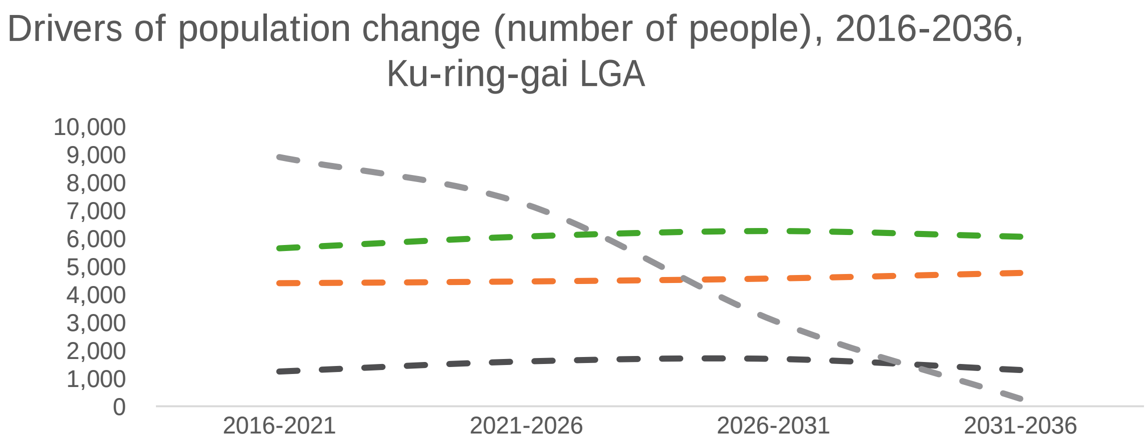
Table 2 Year of Arrival in Australia 2016

Year of Arrival in Australia 2016					
Ku-ring-gai	2015 or later	2010-2014	2000-2009	Prior to 2000	Born in Aus.
2016	2,341	6,760	12,101	23,241	67,679
(%) 2016	2%	6%	11%	21%	60%

Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Net migration is expected to decline in the LGA between 2016 – 2036 as illustrated in **Figure 6** below which shows the drivers of expected population growth[7] between 2016 – 2036.

Figure 6 Drivers of population change 2016-2036



	2016-2021	2021-2026	2026-2031	2031-2036
Births	5,653	6,079	6,275	6,071
Deaths	4,408	4,469	4,574	4,771
Natural change	1,245	1,610	1,700	1,300
Net migration	8,920	7,220	3,075	267

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

[6] SAR, China Hong Kong is a special administrative region (SAR) that exists as part of the People's Republic of China under the "One Country, Two Systems" doctrine, negotiated in the Sino-British Joint Declaration, negotiated and signed in 1984, but taking effect in 1997.

[7] Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

3.2.1 Inward overseas migration and housing choice compared to inward migration from other parts of Australia

Figures 7 and **8** provide an overview of the housing choice of inward migration from overseas between 2011 and 2016. The dominant choice for inward migration from overseas has been for separate dwellings (6,100 people[8]) compared to apartments (3,112[9] people).

It is assumed that approximately 2,100 apartments house people migrating into the LGA from overseas (based on an average household size of 1.5). Based on an average household size of 3 for separate dwellings, those who chose separate dwellings in that five-year period would also equate to approximately 2,000 dwellings. Migration to intermediary housing (semi-detached/townhouse/terrace) stock is low as a result of lack of stock availability – see discussion in **Section 3.6**.

The number of people that migrated to the LGA from other parts of Australia and moved into separate dwellings was approximately 28,163[10] people. This is illustrated in **Figures 9** and **10**. The number that migrated from other parts of Australia and moved into apartments was 10,819[11] people. Using the same assumptions as the above, approximately 9,400 moved into separate dwellings 7,212 apartments between 2011 and 2016.

For overseas migration to the LGA (2011 – 2016), there is generally an equal split in the preference for separate dwellings and apartments. For migration to the LGA from other parts of Australia, there is a slight preference for separate dwellings (approximately 57%) compared to apartments (43%), but not remarkably different to inward migration from overseas.

Therefore, there is a slight preference for separate dwellings over apartments, mainly due to the much more significant volume of inward migration from other parts of Australia.

For inward migration to apartments from overseas, there appears to more of a preference newer apartment stock along the train line. For people moving from other parts of Australia to apartments in Ku-ring-gai, the key centres of Roseville (Boundary Street and West of the Pacific Highway), Killara, Gordon, Warrawee and St Ives. This preference is consistent for those migrating in from overseas or from elsewhere in Australia – see **Figures 8** and **10.**

For separate housing stock, there is a slight trend towards housing located away from the main train line, while those migrating from overseas, there is a slight convergence towards key transport nodes along the train line.

As there is not a major differentiation in trends, other dynamics such as household typologies/ages and issues such as affordability are likely drivers of housing choice. Further investigation of the housing choices of Culturally and Linguistically Diverse Communities (CALD) and relationship to housing affordability is investigated in **Section 9**.

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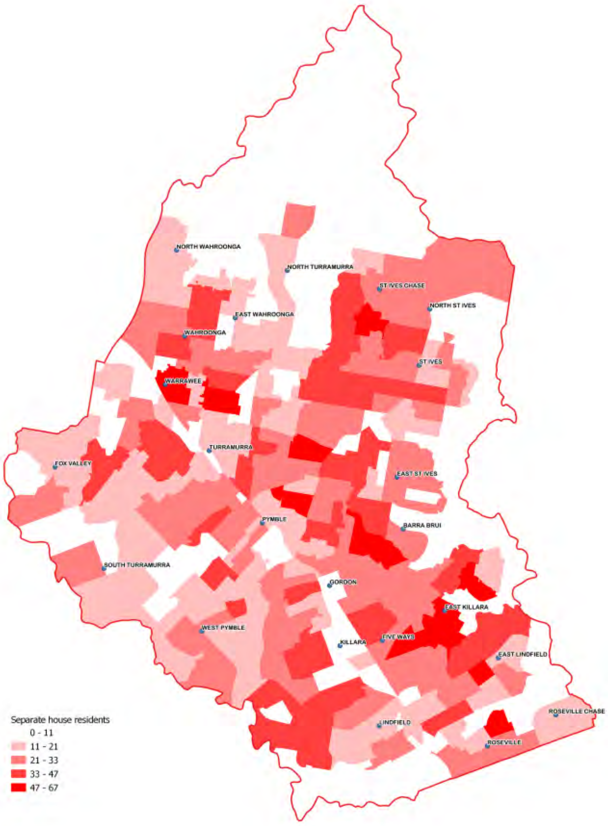
[8] ABS, 2016

[9] As above

[10] As above

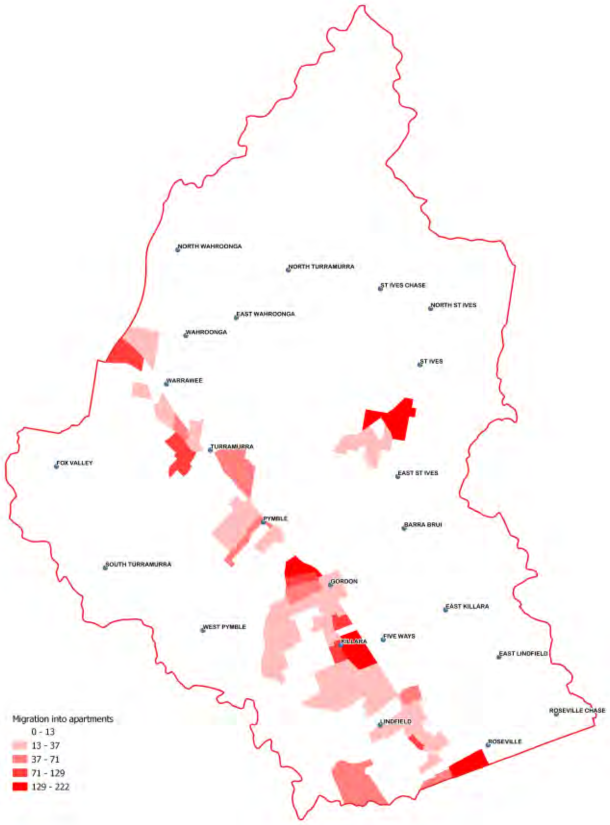
[11] As above

Figure 7 Inward migration from overseas to separate houses 2011 - 2016



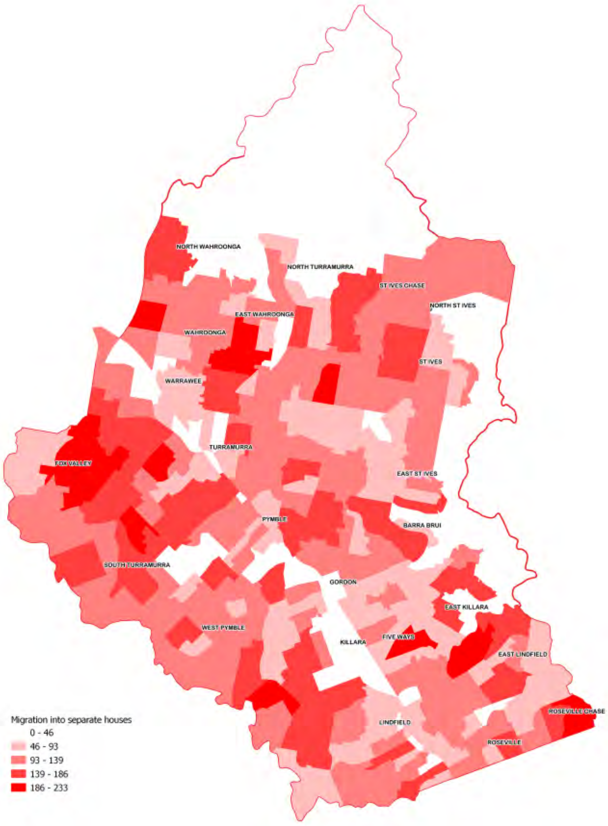
Source: ABS, 2016

Figure 8 Inward migration from overseas to apartments 2011 - 2016



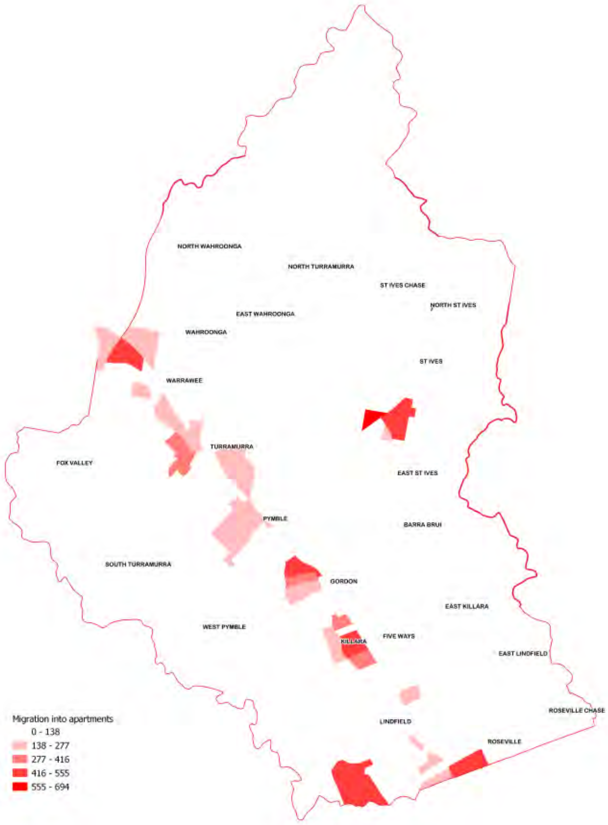
Source: ABS, 2016

Figure 9 Inward migration from other parts of Australia to separate houses 2011 - 2016



Source: ABS, 2016

Figure 10 Inward migration from other parts of Australia to apartments 2011 – 2016



Source: ABS, 2016

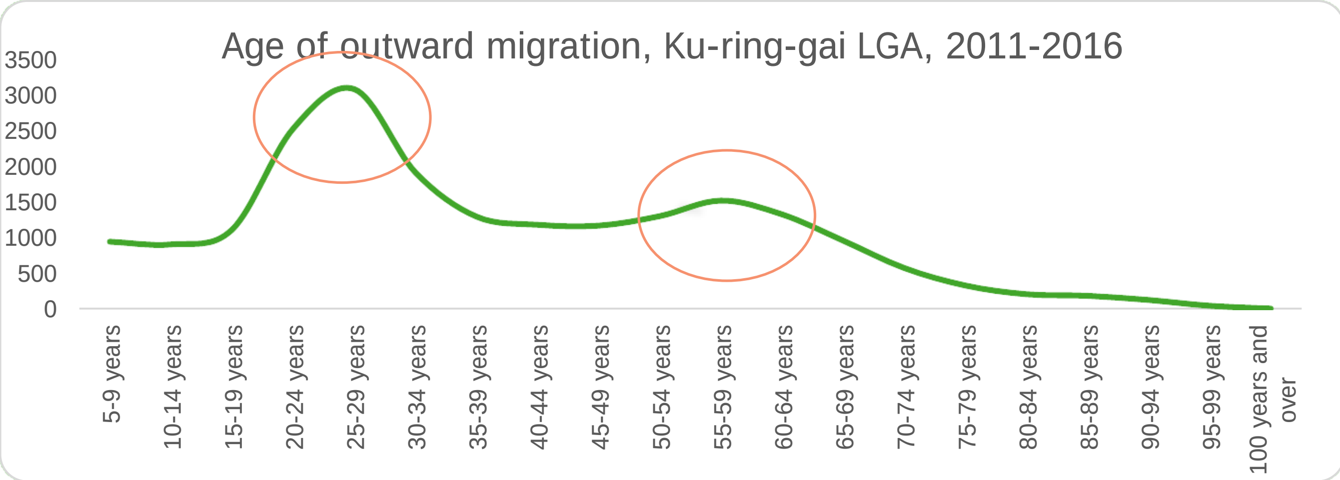
3.2.2 Outward migration

Outward migration from Ku-ring-gai is characterised by two age-group peaks. These are young adults and the 50-to-60-year age group (see **Figure 11**). The latest demographic forecast figures produced by the DPIE take into account for outward migration trends from the LGA[12]. While it is important to recognise that outward migration occurs and this is now accounted for in implied dwelling demand in DPIE's forecast figures, understanding the recipient locations of people who decide to migrate out of the LGA may assist in determining any potential gaps in the housing market in Ku-ring-gai.

This is explored further is the housing demand analysis of younger adults (see **Section 6**) and the ageing population (**Section 5**), the two cohorts where there is a peak in outward migration.

[12] DPIE, NSW 2019 Population Projections – Methodology tab

Figure 11 Age of outward migration in LGA - 2011-2016



Source: ABS 2016

3.3 Implications for housing delivery

The DPIE produces an implied dwelling requirement based on population forecasting and predictions of average household size. The following table outlines the implied dwelling requirement for the Ku-ring-gai LGA (**Table 3**) from the 2019 figures produced by the Department of Planning, Industry and Environment.

Table 3 Implied dwelling requirements in LGA Population projections 2019

ASGS 2019 LGA – Implied dwelling requirement	2016	2021	2026	2031	2036	Change
Ku-ring-gai (A)	43,435	46,100	48,765	51,430	54,095	10,660

Source: DPIE (2019) NSW 2019 Population Projections (includes implied dwelling requirements)

Between 2016 and 2021, approximately 4,300 dwellings have been delivered or are in the pipeline in Ku-ring-gai. Therefore, approximately 6,660 dwellings are required from 2021 – 2036 based on the implied dwelling projections from the DPIE. An average production rate of 425 dwellings per year would be required to achieve this.

While this provides a guide for housing delivery, further investigation is required to better understand the demographics and housing choices to refine housing need for various cohorts. Analysis of economic dynamics such as trends in incomes and housing affordability, as well as workers travelling into the LGA to service key industries, also need to be considered (**Section 13**). Other special needs, such as need for non-market housing like aged care, will also inform the mix of residential accommodation required.

3.4 Gender, age and forecast age structural change

Summary and key implications for the Housing Needs Study

» A key outcome of the forecast projections is a significant rise in the over 50 cohorts. Detailed understanding of likely housing demand for this cohort is provided in **Section 5.**

» While there has been some recovery of the proportion of young adults in the LGA between 2006 – 2016, DPIE figures indicate a decline in this cohort to 2036. Investigations into some of the drivers of this recovery may assist with the Ku-ring-gai Housing Strategy supporting this cohort. The relationship with the relative growth in the 0-4-year cohort in apartments 4-storey and above is investigated in conjunction with the young adult proportional increases. See **Section 6.**

» There will be a significant rise in the over 55 cohorts across many of the LGAs in the North District. Many of these LGAs are recipients of outward migration of the ageing population from Ku-ring-gai. With declining dwelling stock production in some other LGA's (e.g. Northern Beaches), there is likely to be significant increases in competition for suitable dwelling across the North District. There may need to be an even greater focus on providing stock enabling people to age within Ku-ring-gai.

» There is forecast to be a significant rise in the over 80's age cohort in Ku-ring-gai with most other LGAs in the North District exhibiting the same pattern. This may create significant pressure on non-private market residential accommodation, such as aged care. Further investigation in **Section 5**.

» Females are more represented in the adult population in Ku-ring-gai in each age group. This is more pronounced than the proportion of adult female residents in the North District and Greater Sydney. This may suggest that there are greater percentages of female-lone-person households and likely female-headed, one parent households. This may have implications for levels of housing unaffordability experienced by these household types. This is further explored in **Section 7**.

3.4.1 Ku-ring-gai age profile

Figure 12 shows the age distribution change in Ku-ring-gai between 2006 and 2016. Residents aged 5-19 and 40-54 remained the dominant age groups in the Ku-ring-gai LGA in 2016 (2006 – 2016 data comparison). This suggests there is a high proportion of family households with school-aged dependents.

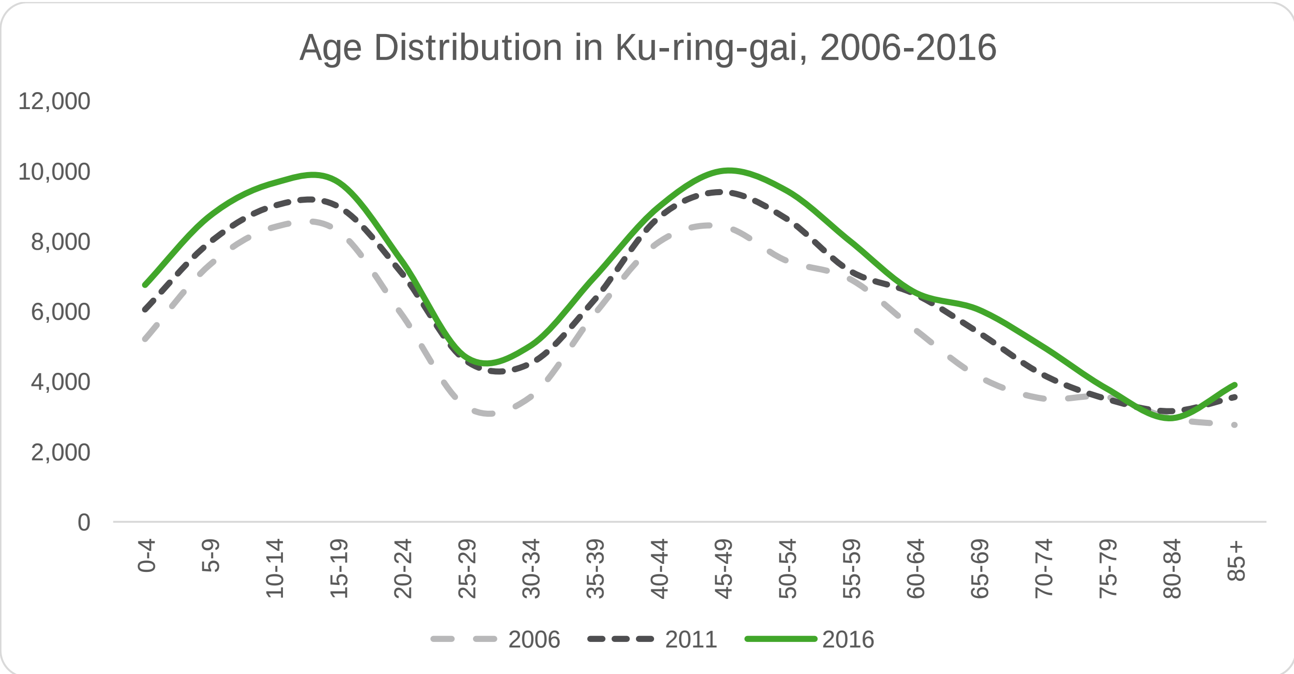
Other than an increasing number of households with children, between 2006 and 2016 notable changes in age structure include:

» Substantial increases in most 50-year and above age categories

» Increases in the young adult cohorts (although proportionally these remain significantly under-represented age groups compared to the North District and Greater Sydney as shown in **Figure 13**)

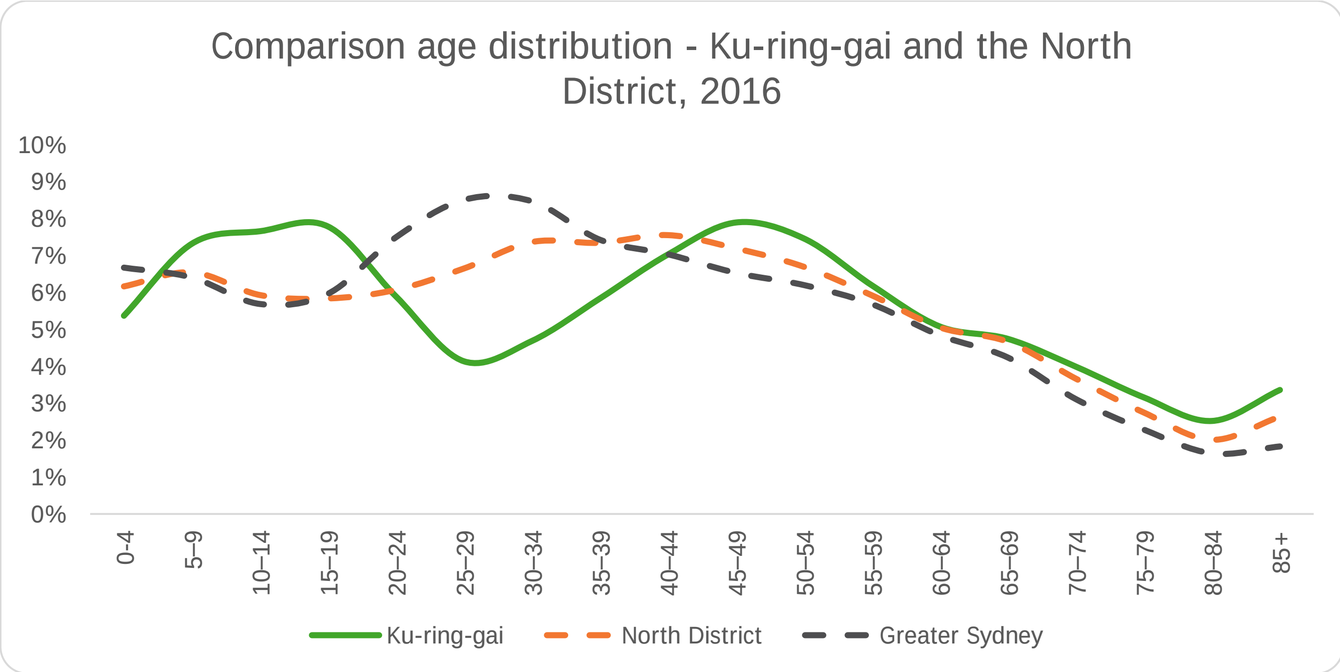
» Significant increases in the 85-year and above age group.

Figure 12 Age distribution 2006-2016



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables AGE5P, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 13 North District comparison age distribution 2016



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2016)

When compared to the North District (see **Figure 13**), as of 2016, Ku-ring-gai had:

» A lower proportion of residents aged 0-4 (10.24% compared to 13.03% respectively)

» A higher proportion of residents aged 10-14 (15.64% compared to 12.91% respectively)

» A higher proportion of residents aged 15-19 (15.79% compared to 12.49% respectively)

» A lower proportion of residents aged 25-29 (7.55% compared to 13.82% respectively)

» A lower proportion of residents aged 30-34 (8.80% compared to 15.84% respectively)

» A lower proportion of residents aged 35-39 (11.48% compared to 16.12% respectively).

Ku-ring-gai LGA also had a significantly lower proportion of residents aged 20-34 compared to the North District and Greater Sydney, with residents aged 25-29 the smallest proportional age group of all adults with the exceptions of some 70 plus cohorts (inverse to Greater Sydney). However, data from the 2006 – 2016 period indicated that the 25 to 34-year-old age brackets exhibited one of the highest growth rates, growing by over 40% between 2006 – 2016 (see **Table 4).** There was also a significant increase in the 0-4-age range. This is analysed in conjunction with the young adult increases, and any potential drivers, to inform potential future housing need (see **Section 6**).

The other highest growth rates are within the 65 plus age brackets (see **Table 4)** with the exception of the 75 – 84-aged cohorts. Analysis of trends in housing choice for ageing cohorts is investigated in **Section 5** to effectively plan for future housing need.

Table 4 Change in age groups 2006 - 2016

Age group	2006	2011	2016	Total change 2006-2016	
				Number	Per cent
0-4	5,212	6,050	6,750	1,538	29.51%
5-9	7,310	7,950	8,700	1,390	19.02%

Age group	2006	2011	2016	Total change 2006-2016	
				Number	Per cent
10-14	8,392	9,000	9,650	1,258	14.99%
15-19	8,303	9,000	9,700	1,397	16.83%
20-24	5,927	7,100	7,450	1,523	25.70%
25-29	3,295	4,600	4,700	1,405	42.64%
30-34	3,544	4,500	5,000	1,456	41.08%
35-39	5,893	6,300	6,950	1,057	17.94%
40-44	7,952	8,650	8,950	998	12.55%
45-49	8,424	9,400	10,000	1,576	18.71%
50-54	7,450	8,650	9,450	2,000	26.85%
55-59	6,921	7,150	8,000	1,079	15.59%
60-64	5,501	6,500	6,550	1,049	19.07%
65-69	4,148	5,400	6,050	1,902	45.85%
70-74	3,520	4,200	5,000	1,480	42.05%
75-79	3,566	3,500	3,800	234	6.56%
80-84	2,956	3,150	2,950	-6	-0.20%
85+	2,767	3,550	3,900	1,133	40.95%

Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables AGE5P, 'Ku-ring-gai (A)' (accessed December 2019)

3.5 Forecast age structural change - 2016 – 2036

The following methodology has been applied by the DPIE to determine the structural age changes that are likely to occur across NSW and specifically for each LGA[13].

» Fertility rates are based on historical birth data from the Australian Bureau of Statistics (ABS) and supplemented with data from NSW, Queensland, Victoria and ACT Health agencies' Perinatal Data Collections.

» Mortality rates are based on the ABS mortality data.

» Interstate and Intrastate Migration are derived from the Census question "where did you live 5 years ago?" These data sources are combined with trend information from historical estimates of interstate migration available from the ABS. The likelihood for people to move in to, or out of, an area is then applied to future populations.

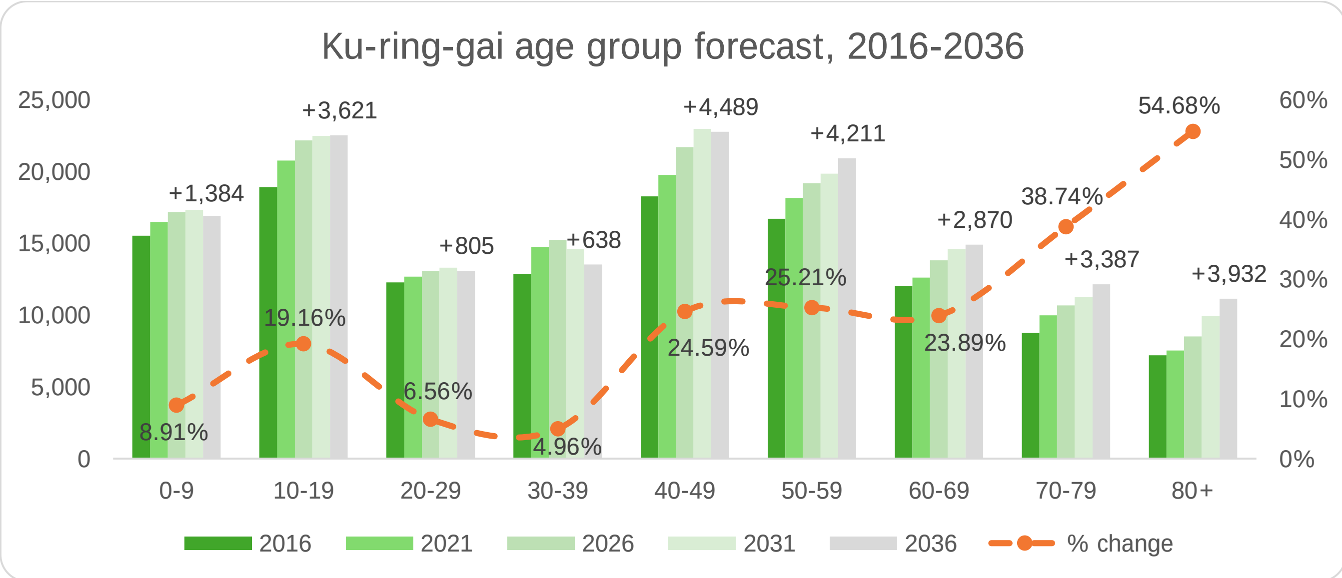
» Overseas migration assumptions have been informed by short term forecasts from the Commonwealth Treasury as presented in the Annual Budget process. These forecasts are based on the latest data from the Department of Home Affairs on visa grants, past overseas migration flows by visa group, existing migration policy decisions and official economic outlooks. Age profiles for both arrivals and departures are determined from ABS data on migration, including the 2016 Census.

[13] DPIE (2019) NSW 2019 Population Projections (includes implied dwelling requirements)

Between 2016 and 2036, Ku-ring-gai LGA is expected to experience significant population growth in the following 10-year-age groups (as shown in **Figure 14 and 15**):

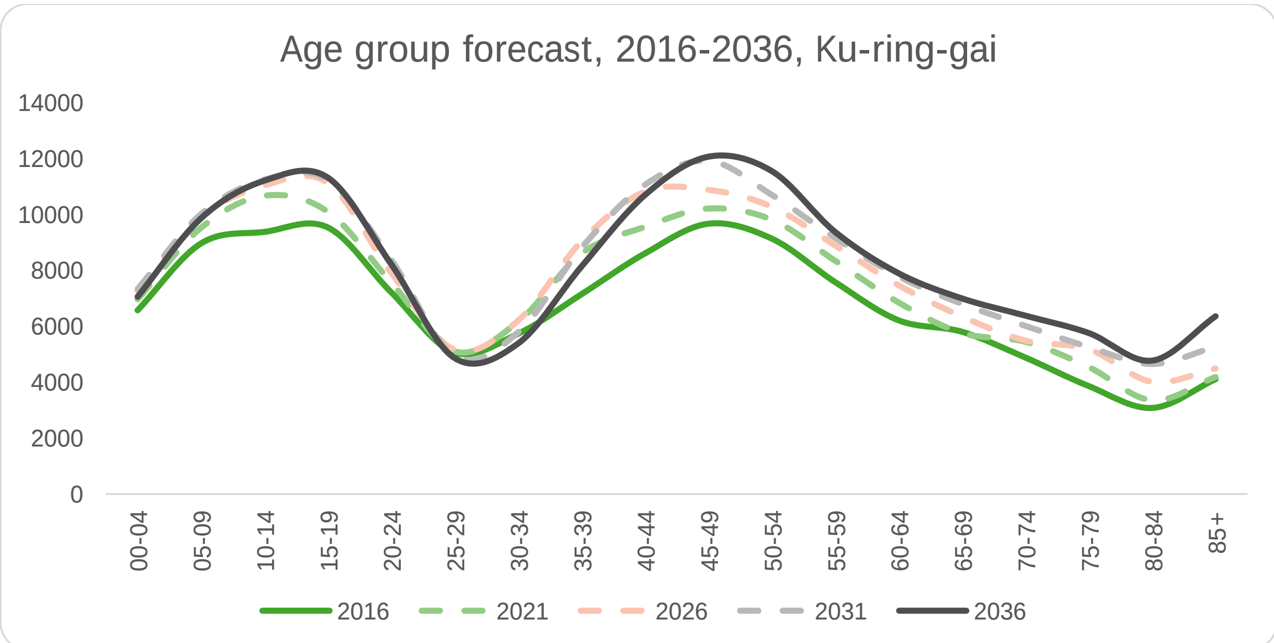
- Increases in the 0-9-age group (an additional 1,384 residents) and the 10-19 (an additional 3,621 residents) indicating and increase in the corresponding family-aged adults
- There will be a total increase of over 14,400 people over 50 years indicating a large number of additional people transitioning from mature family to retirement age, which has the potential to require significant amounts of diverse, smaller housing stock – further investigated in **Section 5.**
- Of the above, there will an additional 3,920 residents 80 plus that will be near or in the category of frail and requiring greater levels of accessibility, assistance or alternative forms of residential accommodation – further investigated in **Section 5.**

Figure 14 Age Forecast group 2016-2036



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

Figure 15 Age group forecast 2016-2036



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

Table 5 Forecast change in various age cohort 2016-2036

Age group	2016	2021	2026	2031	2036	Total change 2016-2036	
	No.	No.	No.	No.	No.	Number	Per cent
0-4	6,569	6,958	7,270	7,328	7,052	483	7.35%
5-9	8,956	9,517	9,894	10,004	9,857	901	10.06%
10-14	9,369	10,664	11,037	11,235	11,205	1,836	19.60%
15-19	9,527	10,090	11,124	11,234	11,312	1,785	18.74%
20-24	7,210	7,562	7,913	8,374	8,216	1,006	13.95%
25-29	5,059	5,098	5,162	4,922	4,858	-201	-3.97%
30-34	5,732	6,153	6,201	5,780	5,379	-353	-6.16%
35-39	7,141	8,595	9,035	8,800	8,132	991	13.88%
40-44	8,598	9,549	10,814	11,049	10,687	2,089	24.30%
45-49	9,659	10,205	10,877	11,911	12,059	2,400	24.85%
50-54	9,129	9,807	10,273	10,695	11,547	2,418	26.49%
55-59	7,576	8,339	8,891	9,153	9,369	1,793	23.67%
60-64	6,211	6,846	7,465	7,779	7,891	1,680	27.05%
65-69	5,802	5,755	6,347	6,796	6,992	1,190	20.51%
70-74	4,881	5,439	5,488	6,011	6,376	1,495	30.63%
75-79	3,862	4,537	5,178	5,255	5,754	1,892	48.99%
80-84	3,082	3,345	4,011	4,649	4,769	1,687	54.74%
85+	4,109	4,179	4,487	5,268	6,354	2,245	54.64%

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

There is expected to be a decline in the 25-35-age group between 2016 - 2036 (See **Figure 15** and **Table 5)**. Further evidence needs to be examined to understand this forecast decline in young adults in the Local Government Area, such as choice of dwellings for this age group, outward migration trends and housing affordability issues (see **Section 6)**.

All age groups in the 55 plus age group will experience significant growth, but is expected to be more pronounced in older age groups. Understanding the dynamics of housing choice as people age is critical to ensuring there is adequate supply (see **Section 5)**. Family households will continue to grow but not at the same percentage rate as older cohorts, but is still expected to be substantial. Factors influencing demand for housing from couple-with-children households are investigated in **Section 8**.

3.5.1 North District Comparison

Between 2016-2036, LGAs within the North District will continue to experience significant ageing of the population. Across all LGAs, the number of residents aged 80 plus is expected to increase. In all but two LGAs (Ryde and Lane Cove), the increase in the number of residents aged 80 plus represents either the largest or second largest age group growth. This will place significant pressure on aged care resources, not only in Ku-ring-gai, but across the entire North District. See **Table 6.**

When compared to other LGAs in the North District (shown in **Table 6**), Ku-ring-gai is expected to experience:

» Strong growth in dependents (0-9 and 10-19). Ryde and Willoughby are the only LGAs that are forecast to have larger increases in these age groups

- More modest growth in residents aged 20-29 compared to other LGAs such as Ryde and Willoughby
- Virtually no growth in the 30 – 39 age group category (and against the 2006 – 2016 trend), while LGAs such as Ryde, North Sydney and Lane Cove will have substantial growth
- Relatively strong growth in elderly residents (80 plus). However, Hornsby, Ryde and the Northern Beaches LGAs to have a greater increase in this age group.

Forecasted population growth is unevenly distributed across the North District. LGAs such as Ryde are expected to experience substantial increases in population while other LGAs, such as Hunters Hill and Mosman, will experience limited or negative growth. Locations such as the Northern Beaches, Ku-ring-gai, Hornsby and Willoughby will have moderate levels of growth.

In terms of increases in the over 50s population, the figures for the Northern Beaches LGA show substantial growth. Anecdotally, the Northern Beaches LGA is the major attractor LGA for over 50s migrating out of Ku-ring-gai LGA. The substantial increase in competition for dwellings suited to that age group could have major implications for outward migration patterns of this cohort considering the forecast drop in dwelling production for the Northern Beaches. The outward migration patterns of the 50 – 60-year cohort are further analysed in **Section 5.**

Table 6 Ku-ring-gai compared to other North District LGAs forecast increases in age groups, 2016-2036

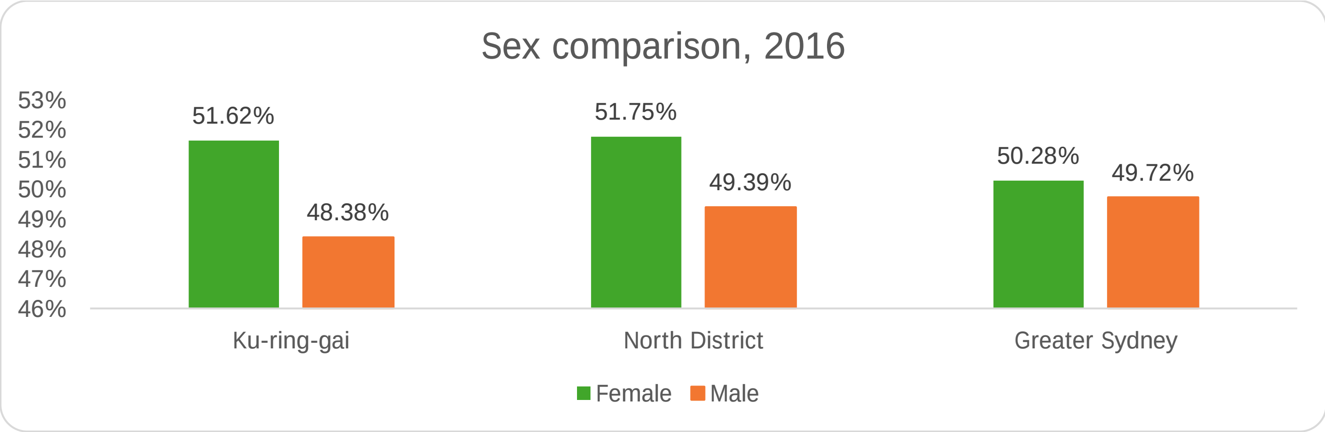
	Hornsby	Hunters' Hill	**Ku-ring-gai**	Lane Cove	Mosman	North Sydney	Northern Beaches	Ryde	Willoughby
0-9	-537	-375	1,384	1,322	-235	2,024	-3,407	10,759	1,487
10-19	2,886	-54	3,621	1,533	96	2,422	4,149	8,916	3,126
20-29	-119	-79	805	104	-514	-773	139	7,472	1,632
30-39	-1,217	-346	638	320	-781	-726	-5,158	12,810	2,288
40-49	2,931	-256	4,489	2,076	-405	2,323	-2,243	15,744	4,078
50-59	3,185	-143	4,211	1,752	-43	2,399	3,977	9,615	3,058
60-69	3,320	-81	2,870	1,002	216	1,737	7,880	6,622	2,049
70-79	5,287	311	3,387	1,154	728	2,830	8,057	6,797	2,737
80+	6,734	420	3,932	1,260	1,462	2,877	9,569	5,268	3,191
Total	22,470	-603	**25,337**	10,523	524	15,113	22,963	84,003	23,646

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

3.5.2 Population profile by age and sex and projected changes

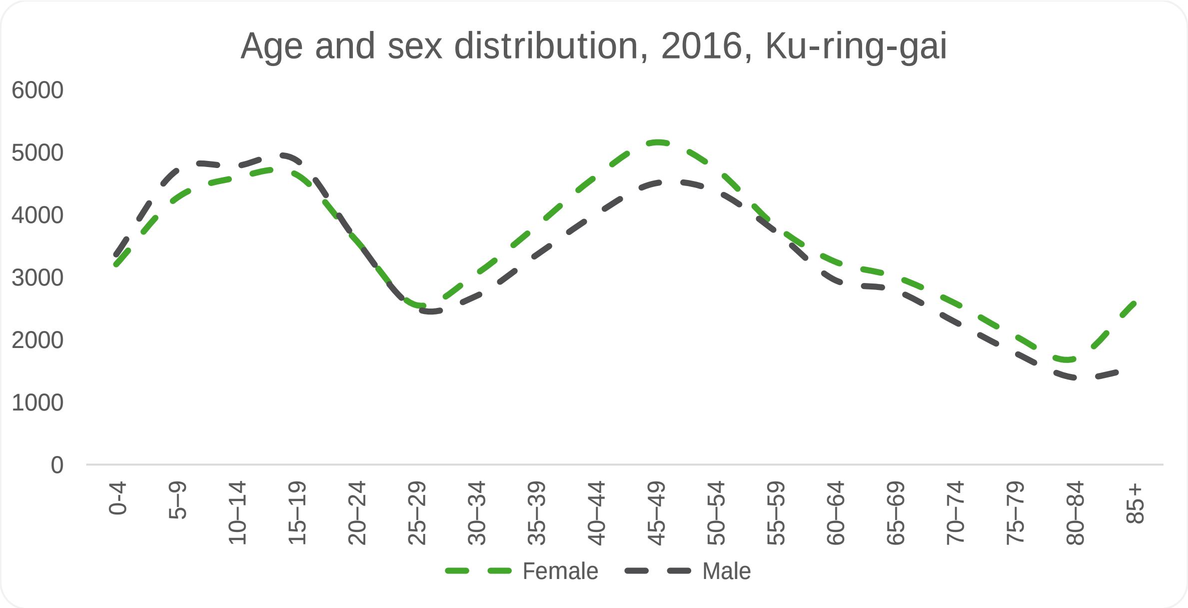
Figure 16 shows the different proportion of males and females in Ku-ring-gai and is compared to the North District and Greater Sydney in **Figure 18**. This is a much greater divergence than difference in sex composition than across Greater Sydney. It is noted that at all virtually all stages of adulthood, females represent a greater proportion of the population in the Ku-ring-gai LGA with the greatest divergence at the 45 – 49 years of age and 85 plus (see **Figure 17**). This has remained stable between the 2006 – 2016 period.

Figure 16 Sex comparison 2016



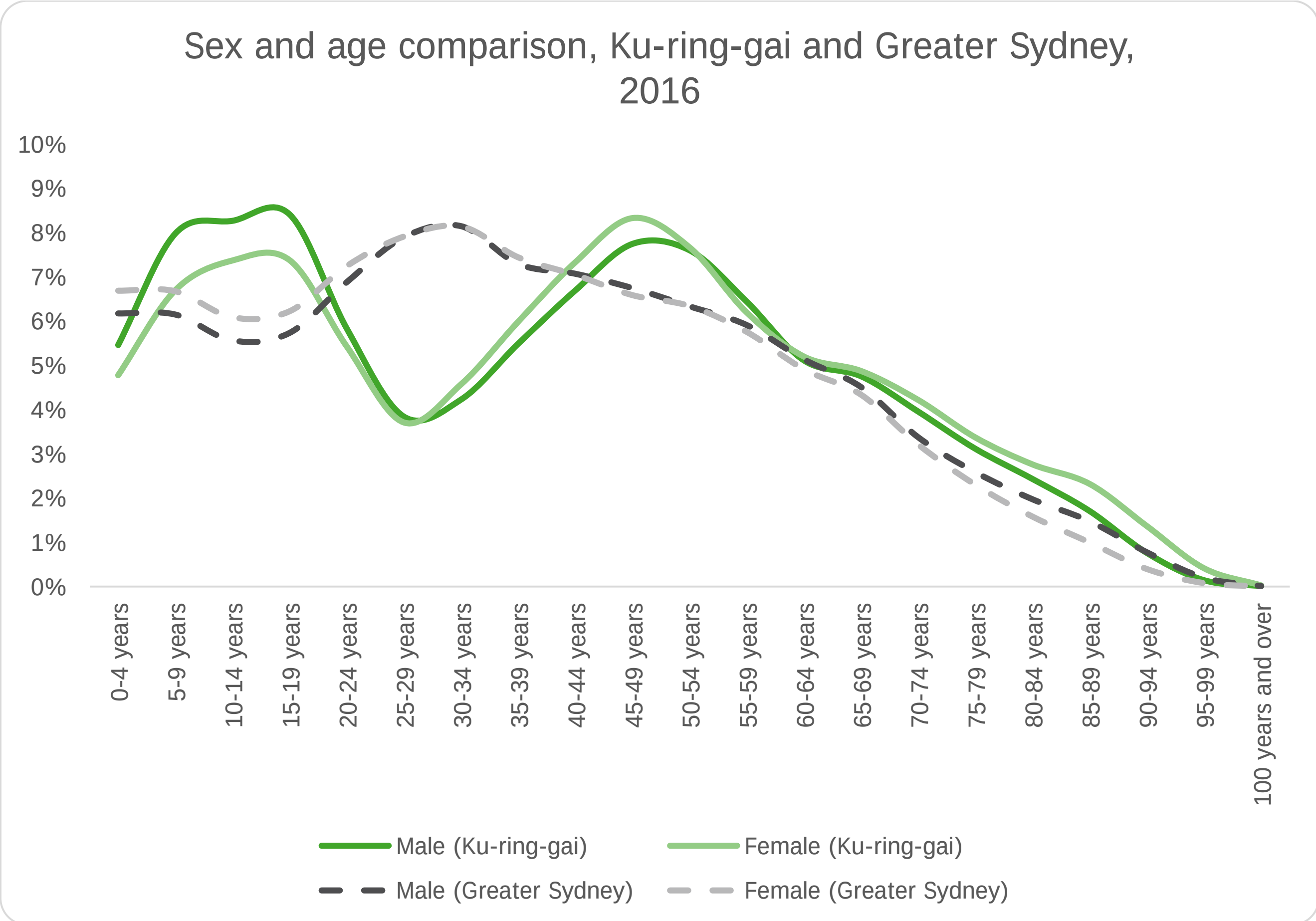
Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Figure 17 Age and sex distribution 2016



Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Figure 18 Sex and age comparison in Ku-ring-gai and Greater Sydney 2016



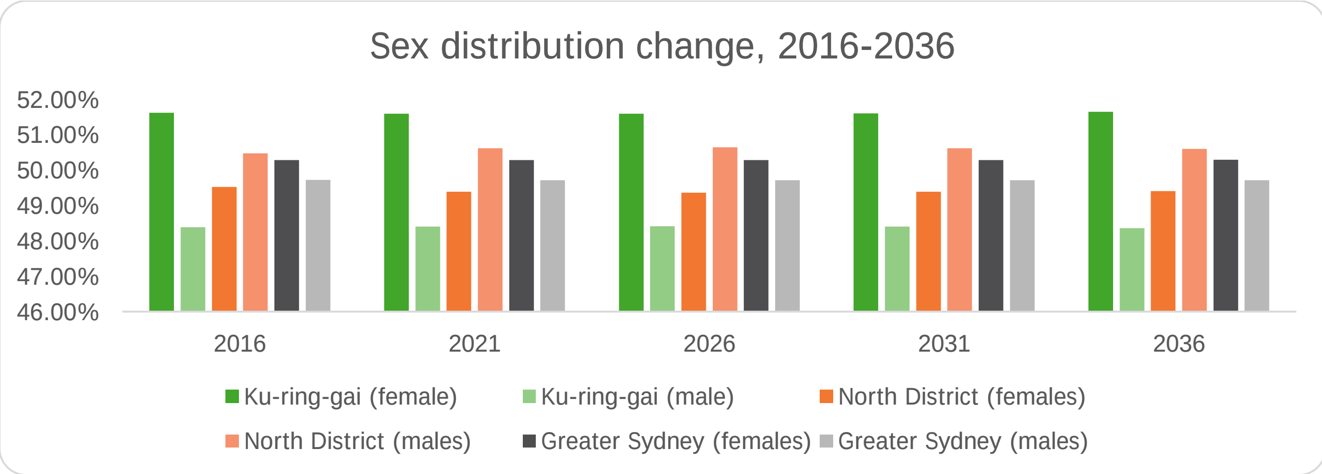
Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2016)

This may have an impact on housing choice and, potentially, housing stress, as this may suggest that a greater proportion of lone person household are female and one parent households are headed by females.

The following graph outlines the expected change in females to males between the 2016 – 2036 period. The distribution of males to females has housing implications as males represent a lesser proportion of the population compared to females, with the difference most pronounced at the 65 plus age groups and widening further to the 85 plus age group. See **Figure 19.** This is also more pronounced in the Ku-ring-gai LGA than both Greater Sydney and is inverse to the North District where there are forecast to be more males than females.

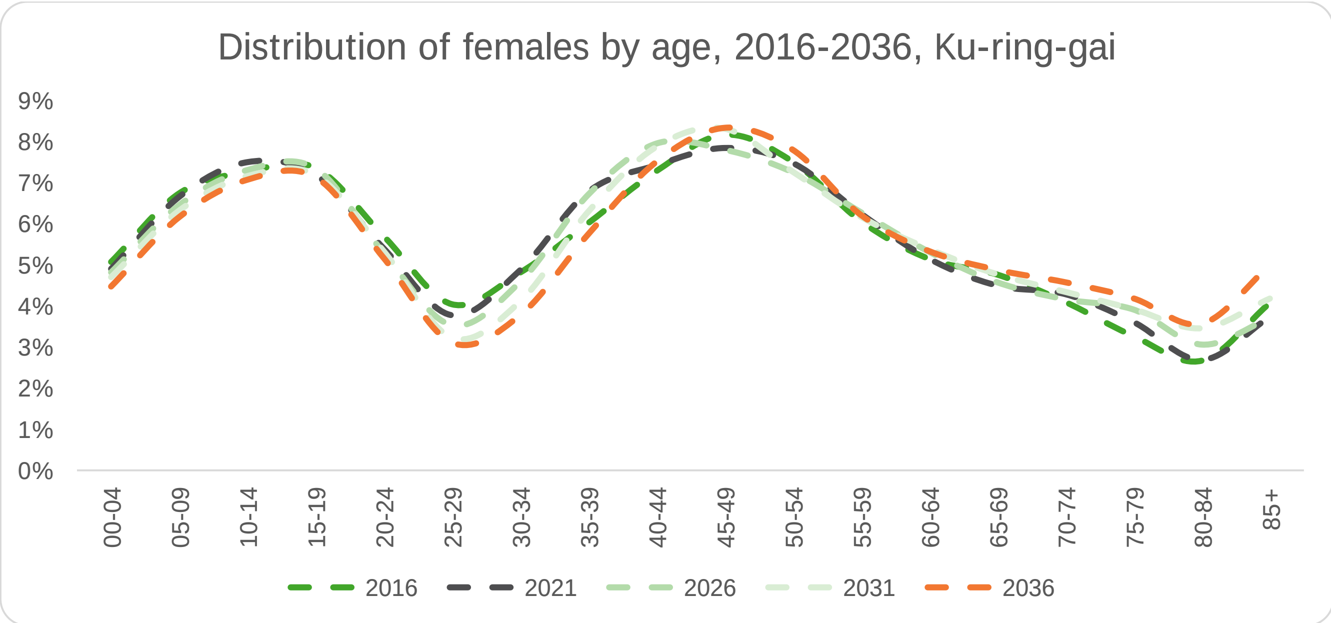
This may indicate that the number of women in lone person households will significantly grow and this cohort may have preferences for particular types of dwellings. The age distribution of females will also get older – see **Figure 20.** Understanding the current housing choice and prevalence of household stress, and its potential impact on female residents of the LGA, is a key investigation question in **Section 7**.

Figure 19 Sex distribution change 2016-2036



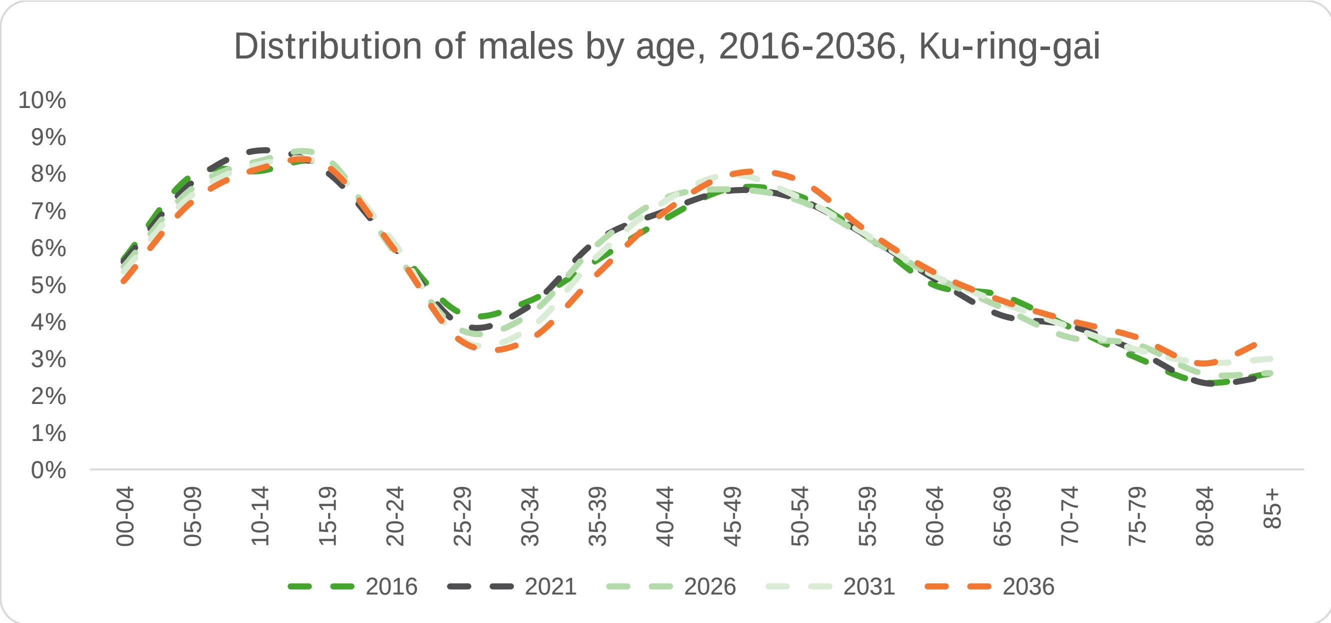
Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

Figure 20 Distribution of females by age, 2016 - 2036



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

Figure 21 Distribution of males by age 2016-2036



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

3.6 Current household types and relationship to dwelling structure and household type forecasts

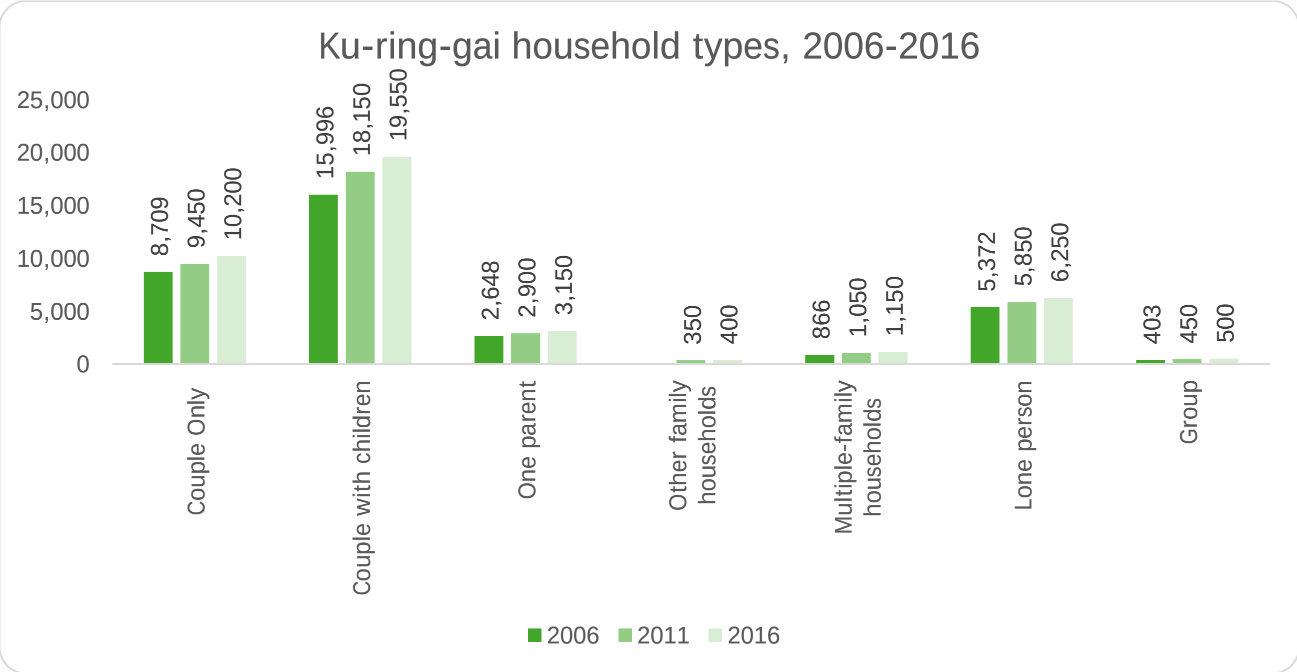
Summary and key implications for the Housing Needs Analysis

- DPIE forecasts indicate that there will be approximately 10,500 additional households in the LGA by 2036.
- While growth has been the dominated by couple-with-children households between 2006 – 2016, smaller couple-only and lone-person households are set to outstrip growth other larger household types. This is forecast to be an additional 5,500 smaller households in the LGA by 2036, compared to approximately 3,500 couple-with-children households. Due to forecasted downward trends in household size, even without growth, there is the potential for housing pressure.
- Data indicates that smaller households are continuing to be highly represented in larger dwelling stock and investigations into trends between 2006 – 2016 are critical to understand if there are any emerging trends. See **Section 5.**
- There is also a critical need to investigate issues such as housing stress in order to determine if the impetus to downsize will continue to grow. See **Section 5.**
- The average household size of households with children will also likely contract. Understanding the trends in housing choice of households with children, and factors such as affordability, are required to predict likely dwelling typologies required. See **Section 8** (also **Section 6** for investigations into starting out families).

3.6.1 Ku-ring-gai trends in household types 2006 – 2016

The most pronounced growth in the 2006 – 2016 period in household types was couples with children in the Ku-ring-gai LGA. More modest growth occurred in all other household types. See **Figure 23**.

Figure 22 Household types 2006 - 2016



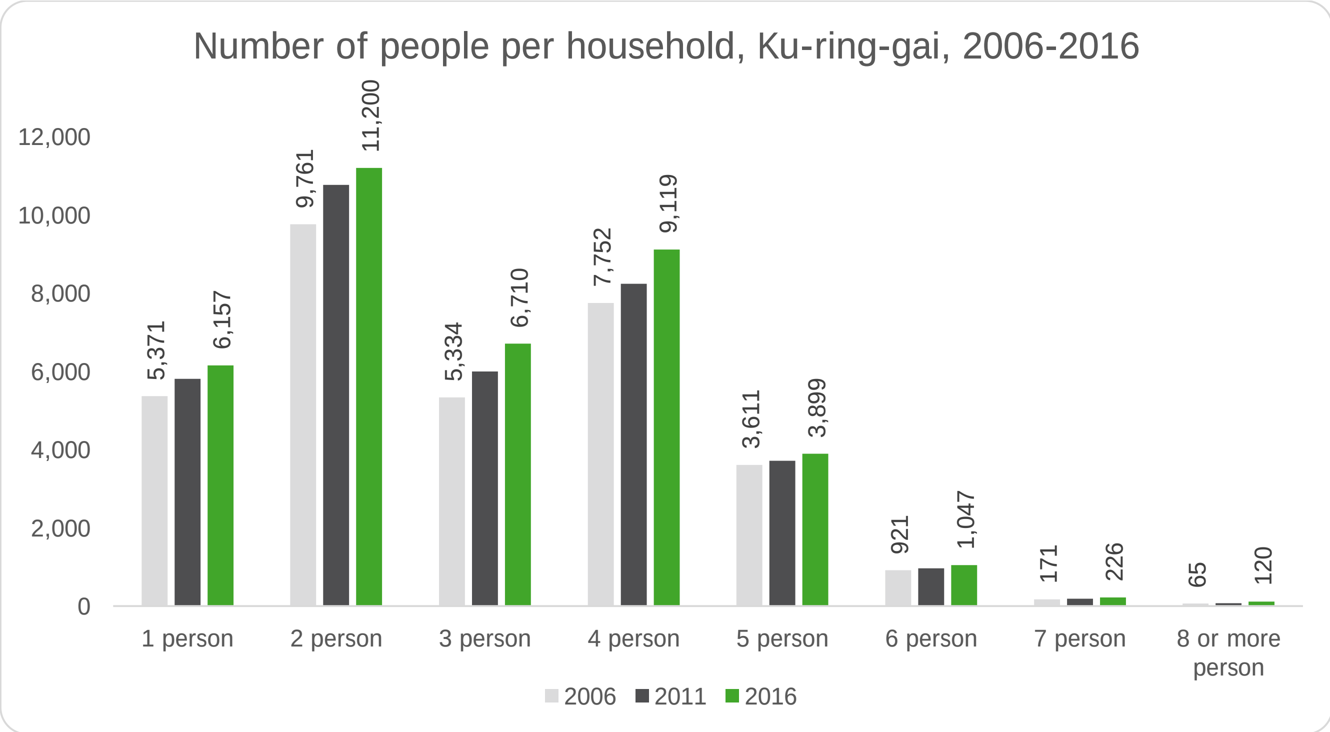
Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables HCFMD, 'Ku-ring-gai (A)' (accessed December 2019)

3.6.2 Current household type and size and the relationship to dwelling structure

In the Ku-ring-gai LGA, the average household size has declined marginally. Between 2006 – 2016, growth in one, two, three and four person households occurred, with more restrained growth in five-person and above households.

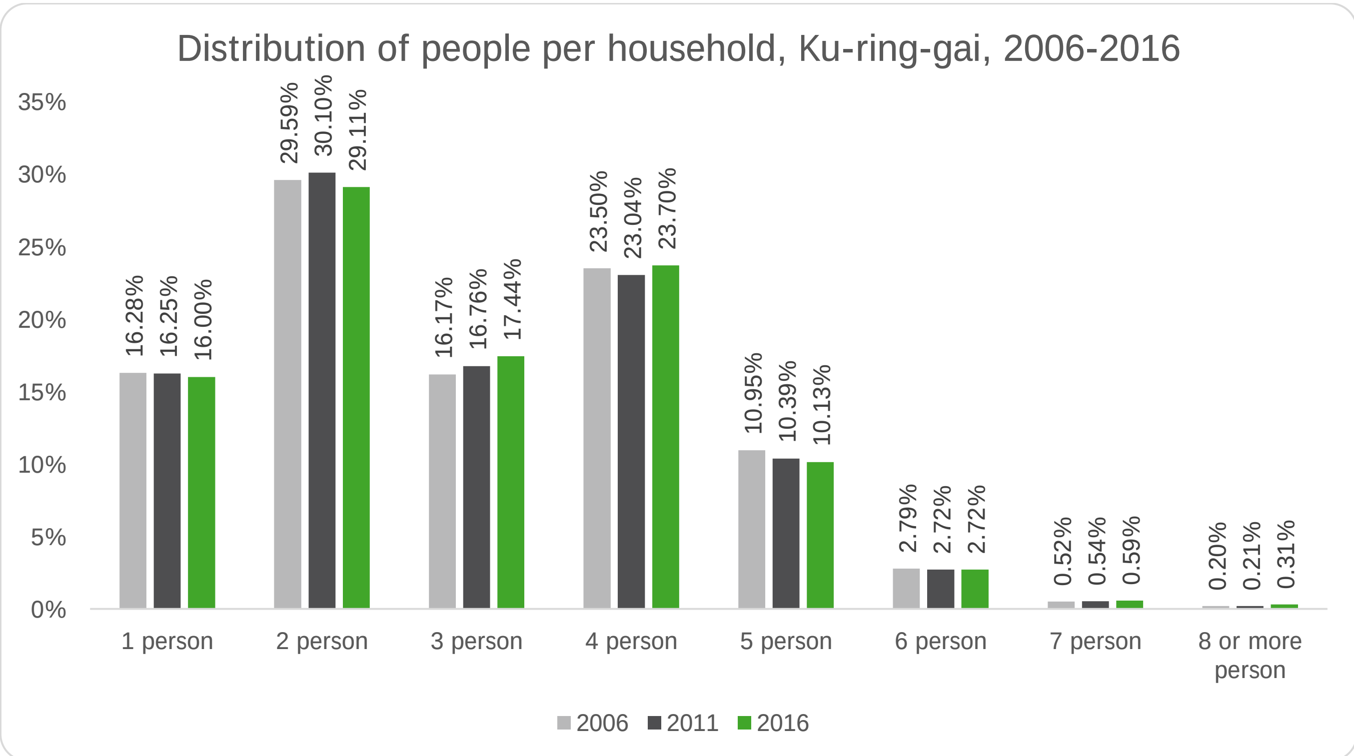
However, when compared as percentage of the population (see **Figure 24**), there is a clear indication of a rise in three person households. This may indicate a need for some smaller dwelling stock for families with children to 2036. This is further investigated in **Section 8**. However, as at 2016, the proportion of 4-person households in Ku-ring-gai was greater than the North District or Greater Sydney.

Figure 23 Number of people per household



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, NPRD, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 24 Distribution of people per household 2006-2016



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, NPRD, 'Ku-ring-gai (A)' (accessed December 2019)

When examining household composition and number of bedrooms (see **Figure 26**), it can be shown that:

» Only 20% of couple-only households reside in one or two-bedroom stock.

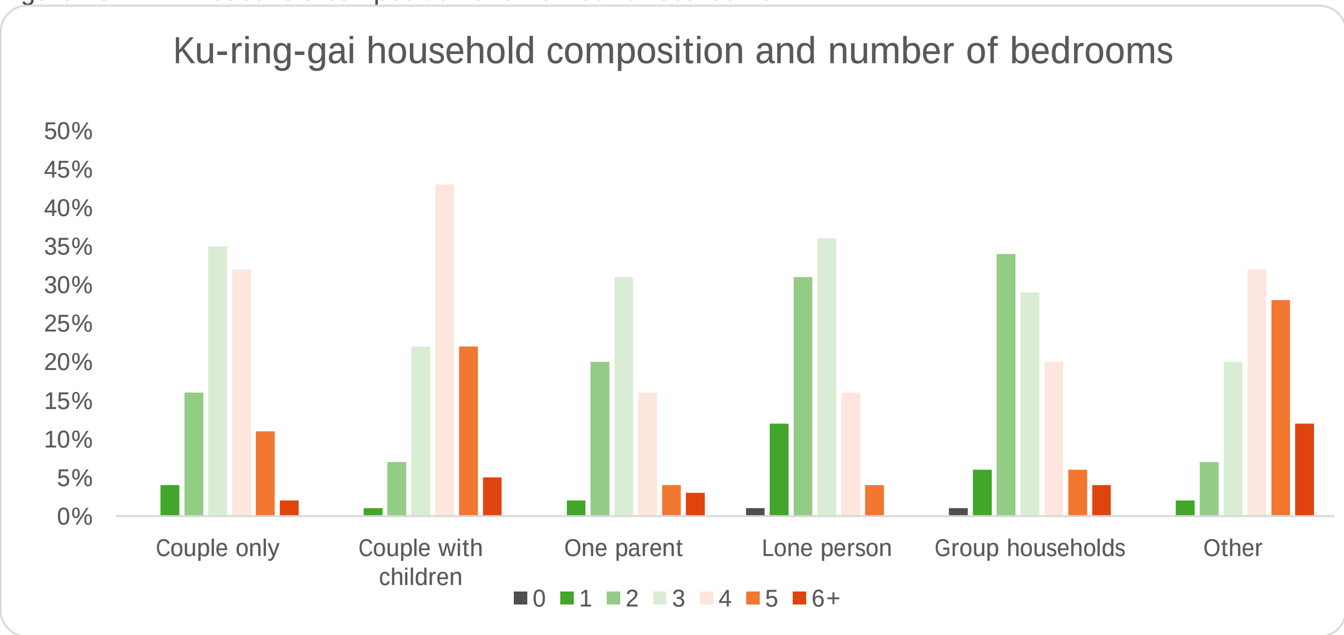
» Only 13% of lone-person households reside in one or two-bedroom stock.

This indicates a low level of downsizing in the LGA. A key investigation question is whether there is a relationship between availability of smaller housing stock and the absence of a trend in downsizing for these household types. Analysis of the trends in dwelling choices between 2006 – 2016 is provided in **Section 5**.

48% of one parent households also live in separate dwellings. Investigating if there has been change in dwelling preferences and affordability issues for these households is explored further in **Section 7**.

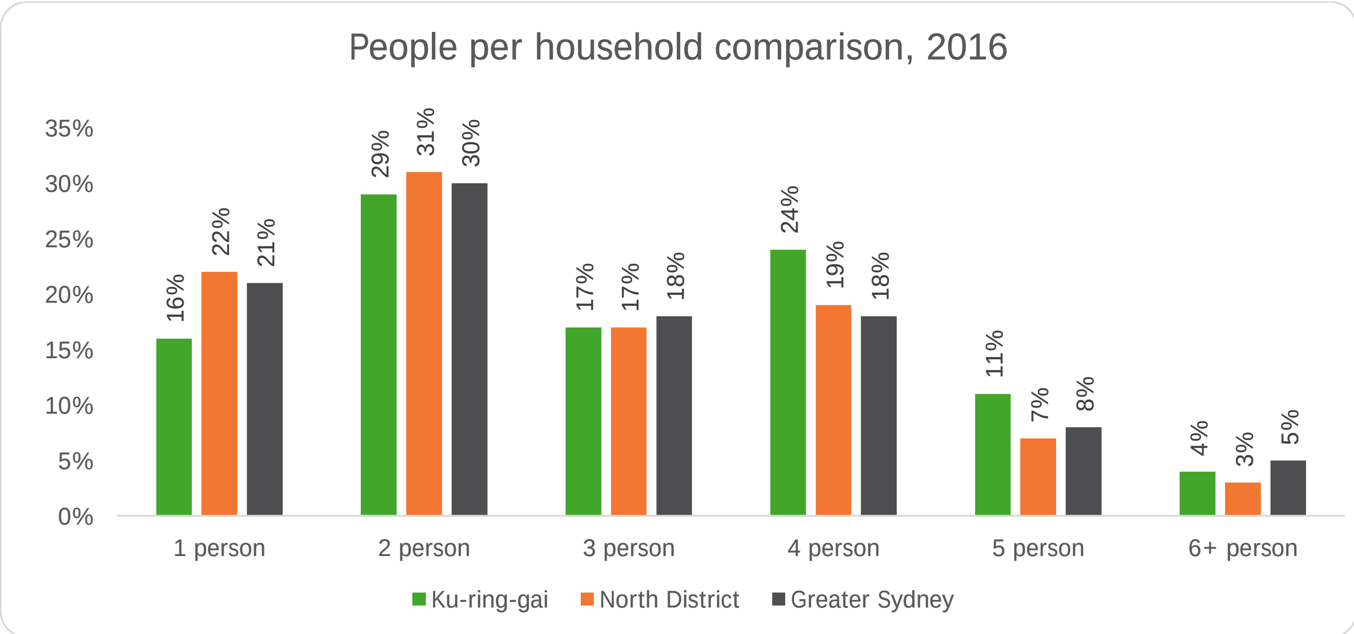
Similarly, for couples with children, there is a downsizing trend in family size. Investigations to assess if some smaller dwelling types are required for this cohort is required. See **Section 8**.

Figure 25 Household composition and number of bedrooms



Source: ABS, 2016

Figure 26 People per household comparison



Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA) 2016

3.6.3 Forecast household growth

Ku-ring-gai is forecast to accommodate 10,427 additional households by 2036. The growth in the number of households in Ku-ring-gai is projected to be at a lower growth rate than the North District and nearly half the overall growth rate for Greater Sydney – see **Table 7.**

Table 7 Household projection 2016-2036

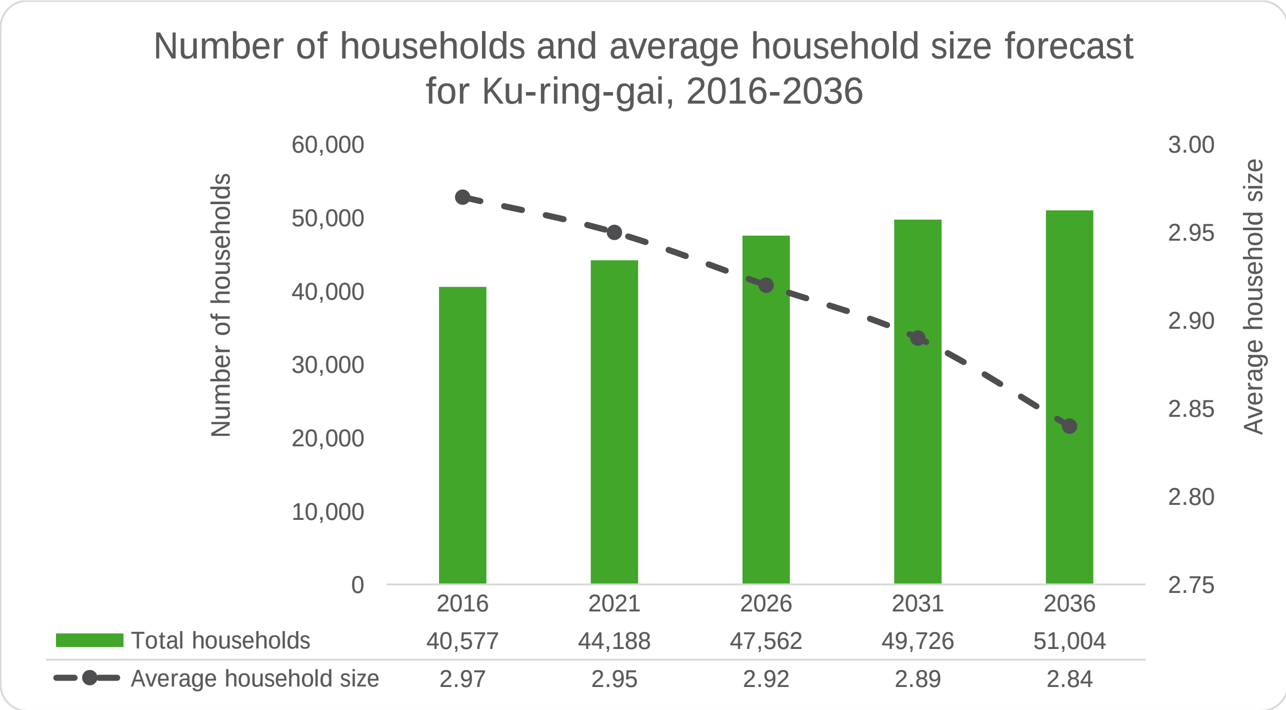
Household projection 2016-2036				
	2016	**2036**	**2016-2036 Total growth**	
Ku-ring-gai	40,577	51,004	10,427	25.7%
North District	326,476	416,662	90,186	27.6%
Greater Sydney	1,669,774	2,449,910	780,136	46.7%

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

Note: DPIE projections for Greater Sydney do not include Central Coast LGA. Household projections do not include non-private dwellings such as boarding houses and nursing homes.

As indicated by the trends between 2006 – 2016, there is also a forecast continued level of decline in average household sizes. While the decline in number of children in family households will have an impact on this trend, the reduction will largely be driven by the significant rise in lone and couple-only households projected to 2036. Considering the age profile forecasts previously outlined in **Section 3.4**, these will mainly be older couple and older lone person households.

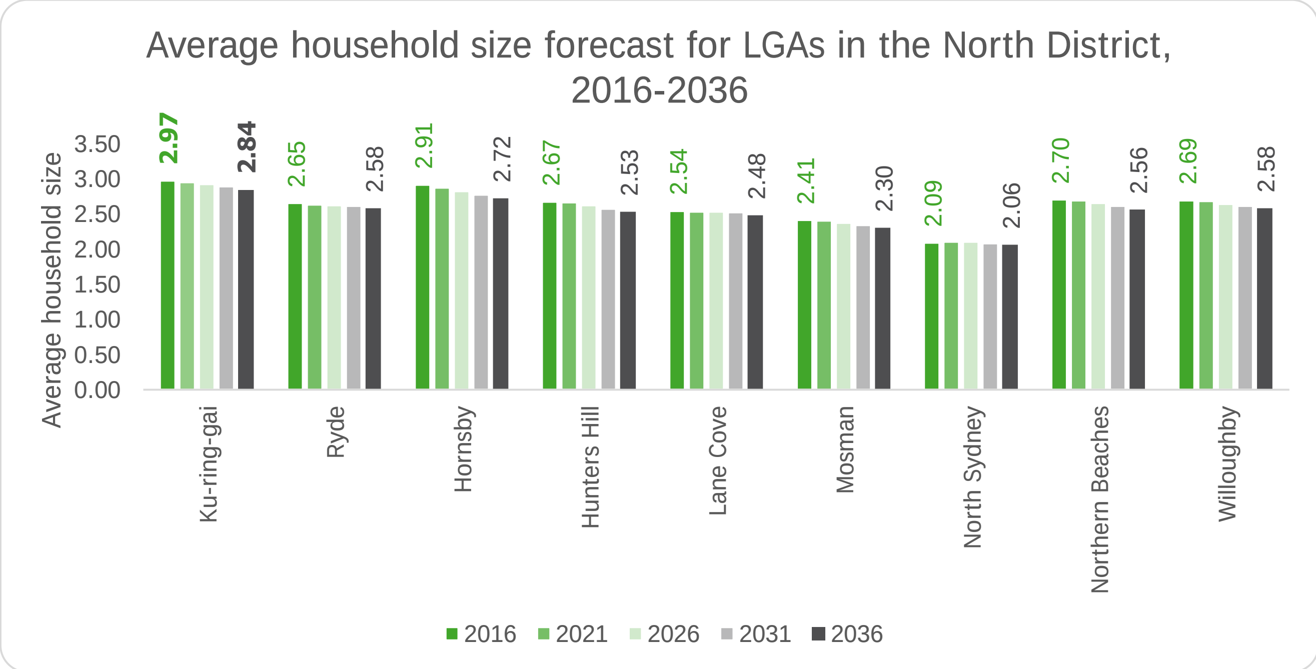
Figure 27 Number of households and average household size forecast for Ku-ring-gai, 2016-2036



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

All surrounding LGAs in the North District are forecast to experience a reduction in average household sizes – see **Figure 29**. Therefore, even without growth, more dwellings are required to effectively house the same population and increases in housing pressure are expected across the North District.

Figure 28 Average household size forecast for LGAs in the North District



Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

3.6.4 Household structure change

As a result of the ageing population, the greatest forecast growth in types of households will be in smaller mainly older couple and lone person households. There is projected to be a growth of approximately 5,500 of these household types by 2036 (see **Figure 30)** with lone or couple households expected to constitute 42% of all households in the LGA[14] (see **Figure 31**)]. In comparison, couple with children is forecast to constitute 45% of all households.

The growth in these smaller households is forecast to outstrip couple with children, one parent and multi-family households combined (less than 4,000 households). Analysing the trends in dwelling choice and issues related to affordability for ageing lone and couple households will be critical to understand the number of dwellings required of various typologies. See **Section 5.**

Added to this, it is forecast there will be approximately 930 additional one parent households in the LGA. Dwelling choice and affordability issues currently experienced by these household types also need to be examined. See **Section 7.**

There is also forecast to be continued growth in the couple with children households but at about half the rate of the 2006 – 2016 period. Investigation into trends in dwelling type preferences, as well as affordability concerns that may further influence dwelling choice, is provided in **Section 8** and **Section 6** (specifically young starting out families).

[14] DPIE, ASGS 2019 Population Projections (lone and couple only projected households divided by the total number of projected households)

Figure 29 Household change 2016-2036 (additional household of each type)

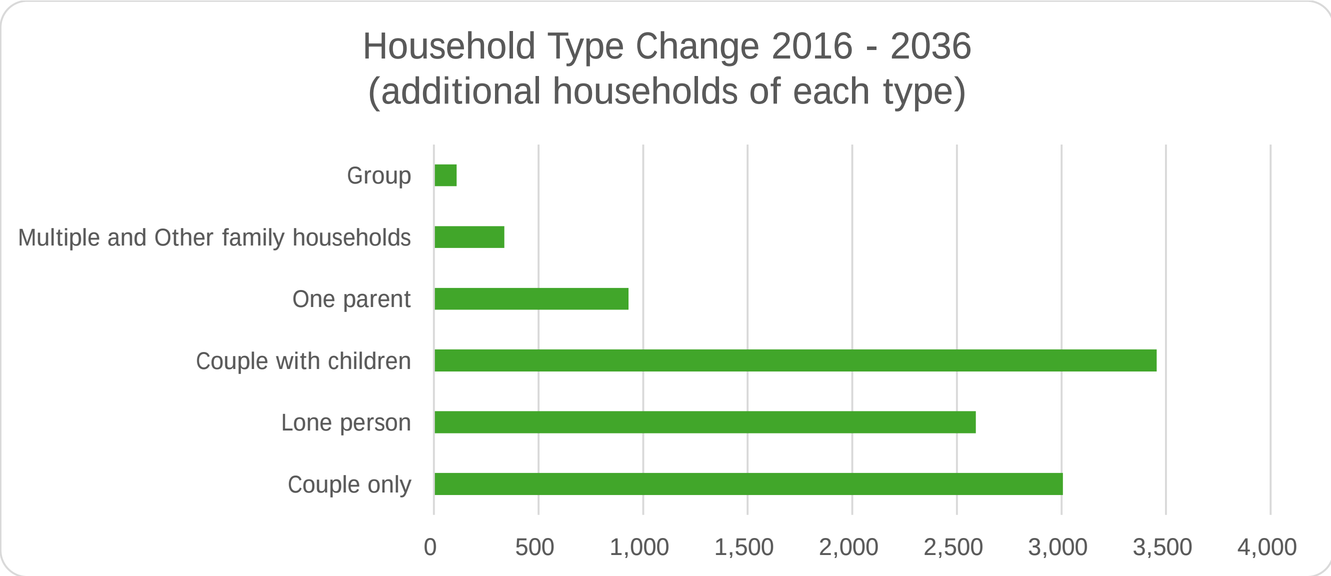


Figure 30 Forecast percentages of different household types at 2036

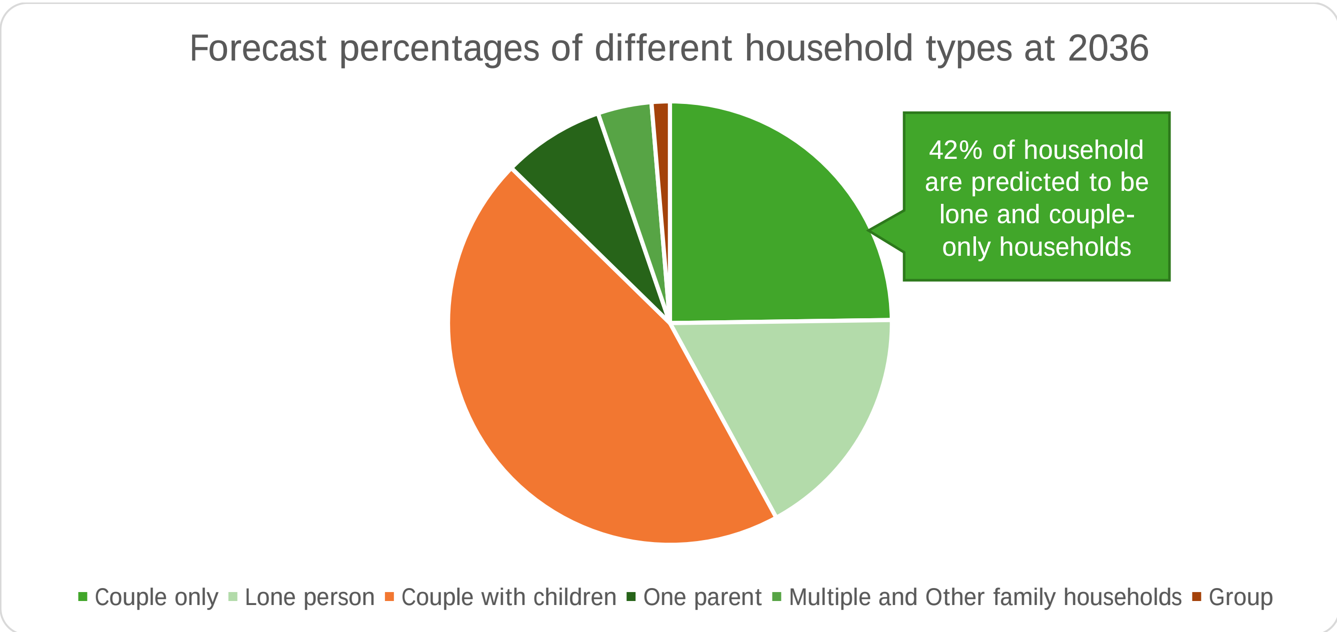
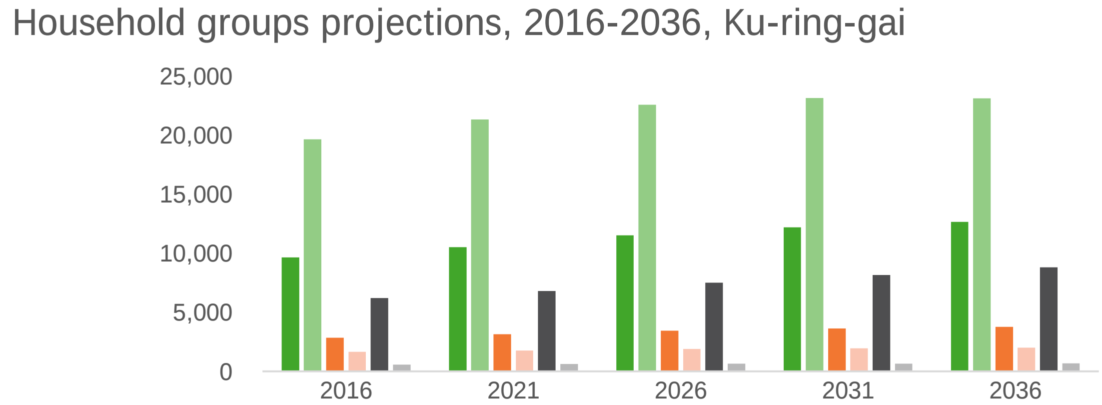


Figure 31 Household groups projections 2016-2036



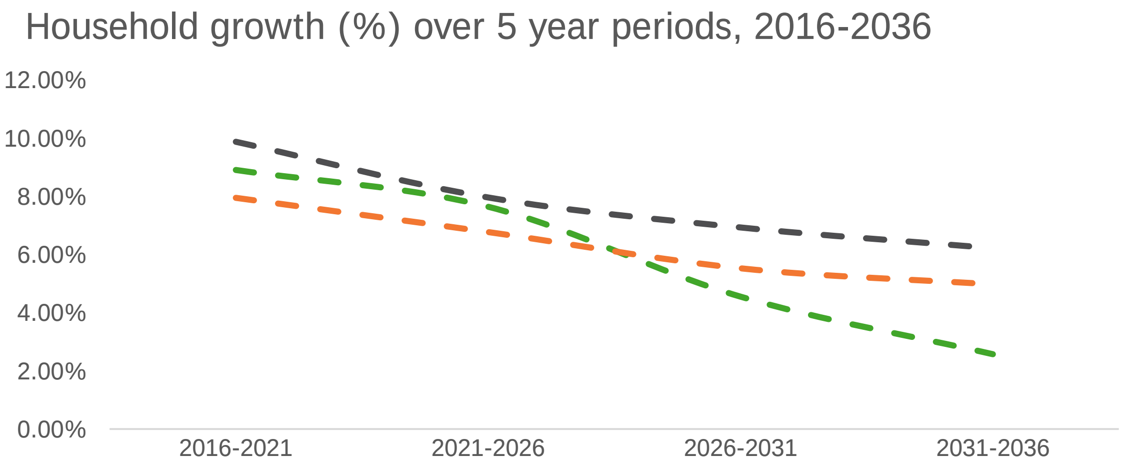
	2016	2021	2026	2031	2036
Couple only	9,633	10,504	11,516	12,193	12,639
Couple with children	19,641	21,320	22,550	23,119	23,096
One parent	2,854	3,157	3,433	3,640	3,784
Multiple and Other family households	1,663	1,775	1,892	1,954	2,000
Lone person	6,216	6,815	7,515	8,158	8,806
Group	571	617	656	662	679

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

Household growth, however, is set to decline over the five-year periods between 2016 – 2036. See **Figure 33.** The decline in household growth is more pronounced in Ku-ring-gai post 2026 than the forecast trend for the North District and Greater Sydney.

While this indicates that delivery of housing in Ku-ring-gai should have a greater focus on the 2016 – 2026 period, it is likely that housing requirements will be as much driven by age structural change in the 2026 -2036 period i.e. there could be a continued downsizing trend.

Figure 32 Household growth (percentage) over 5-year periods



	2016-2021	2021-2026	2026-2031	2031-2036
Ku-ring-gai	8.90%	7.64%	4.55%	2.57%
North District	7.94%	6.76%	5.52%	4.96%
Greater Sydney	9.86%	7.95%	6.92%	6.21%

Ku-ring-gai North District Greater Sydney

Source: Department of Planning, Industry and Environment – NSW Population Projections Data (2019)

3.6.5 **Current age structures of various household types**

Summary and implications for the Housing Needs Analysis

» The age structure of couple-only households is dominated by the 55 plus age group, and this is expected to continue to 2036 and intensify based on the forecast age profile for the LGA. Therefore, the majority of couple households may consider downsizing.

» The peak of lone person households is in the 70+ age group as one would expect. However, there is a smaller peak of lone and couple only in the 25 – 35-year-old age bracket.

» Couples with children and one parent families generally have adults aged between 35 – 50 years.

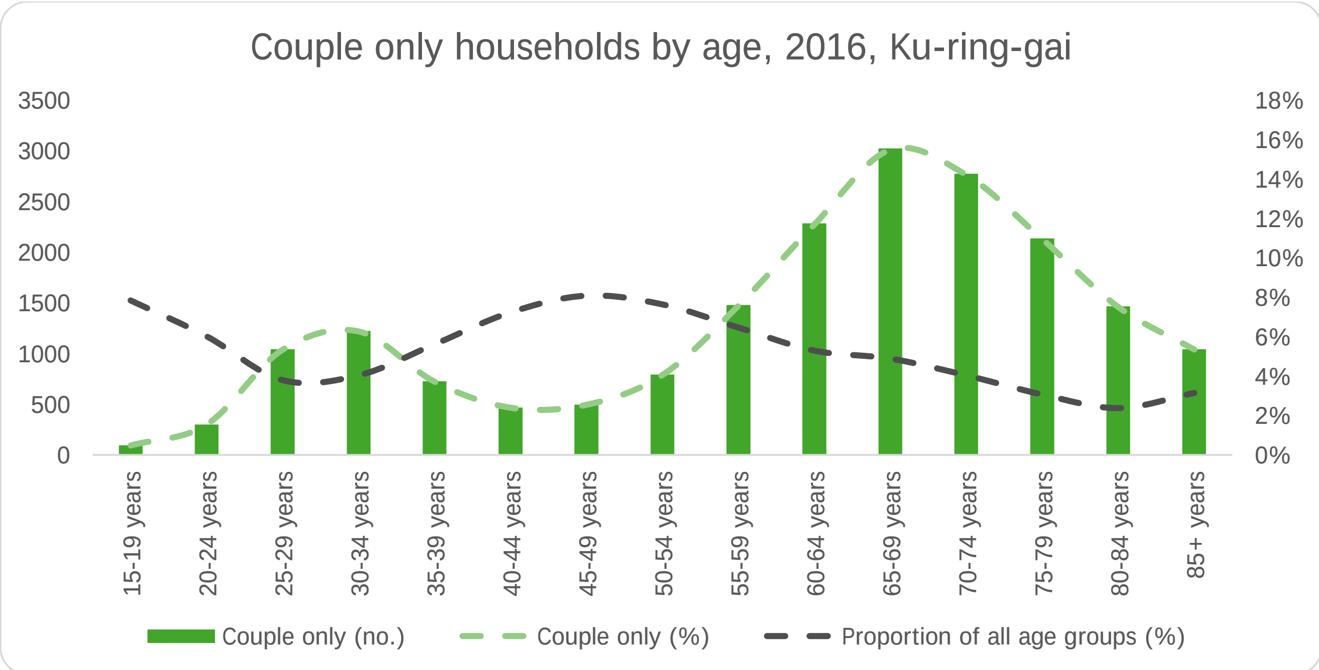
» Multiple family households have a much more varied age distribution. Currently around 360 households in the LGA have this type of living arrangement. This may rise with increasing lack of affordability and an ageing population as more multi-family households may emerge. Children in multi-family households peak at very young ages. This could either indicate newly formed households of this type or that multi-family households dissolve as couples with children become more established

» Group households are generally formed by the 25 – 35-year-old age range. However, there is increasing evidence that some older cohorts are forming this type of household potentially as a result of affordability concerns.

Current age structure of households

As would be expected, couple-only household age profiles peak at the 65 – 69-year age bracket. However, it should be noted that there is also a smaller peak at the 30 – 34-year-old age bracket. See **Figure 34**.

Figure 33 Couple only households by age

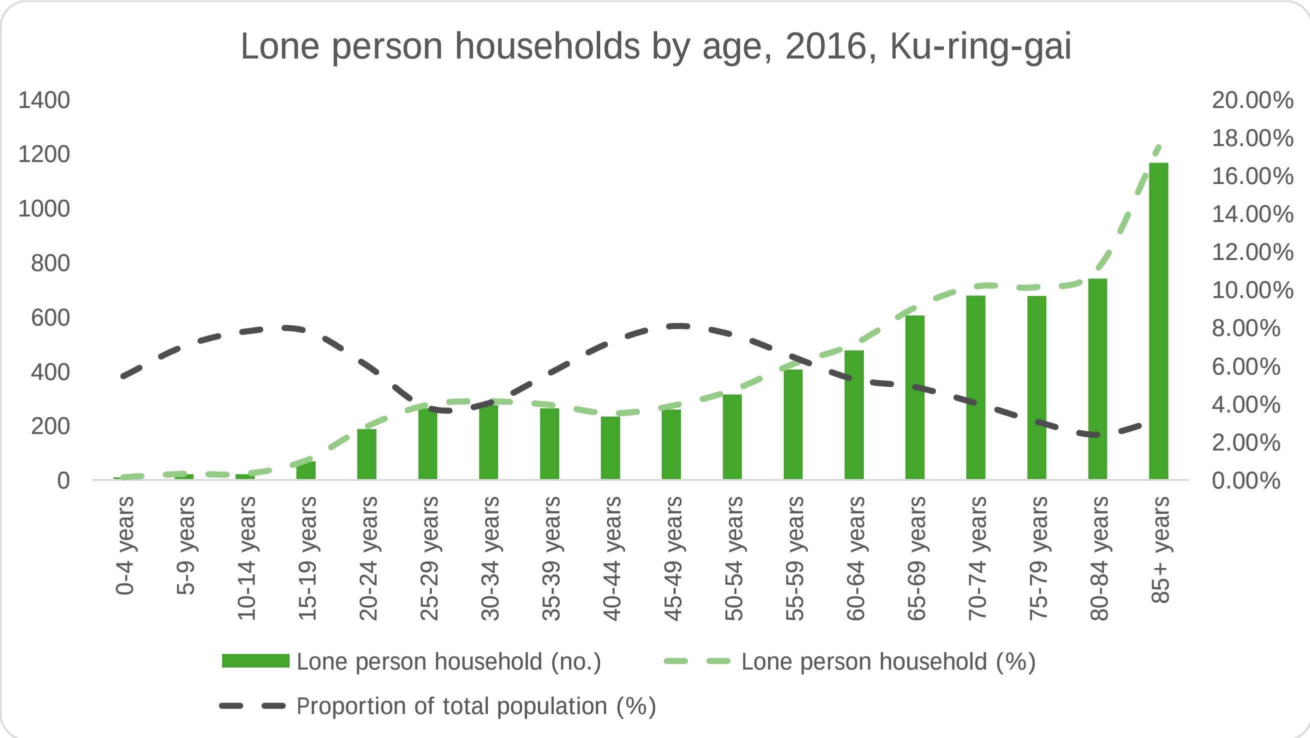


Source: Australian Bureau of Statistics, TableBuilder Pro, variables, HCFMD, AGE5P, 'Ku-ring-gai (A)', (accessed December 2016)

Lone person households tend to peak in the older age groups, with the most significant rise in the 85 plus age range. One of the key outcomes of this is that the transition to a lone person household may have less influence on downsizing choice (when over 55s choose to do that), is more likely based on a couple household. See **Figure 35**. The trends associated with this are explored further in **Section 5**.

There are very few young adult lone person households.

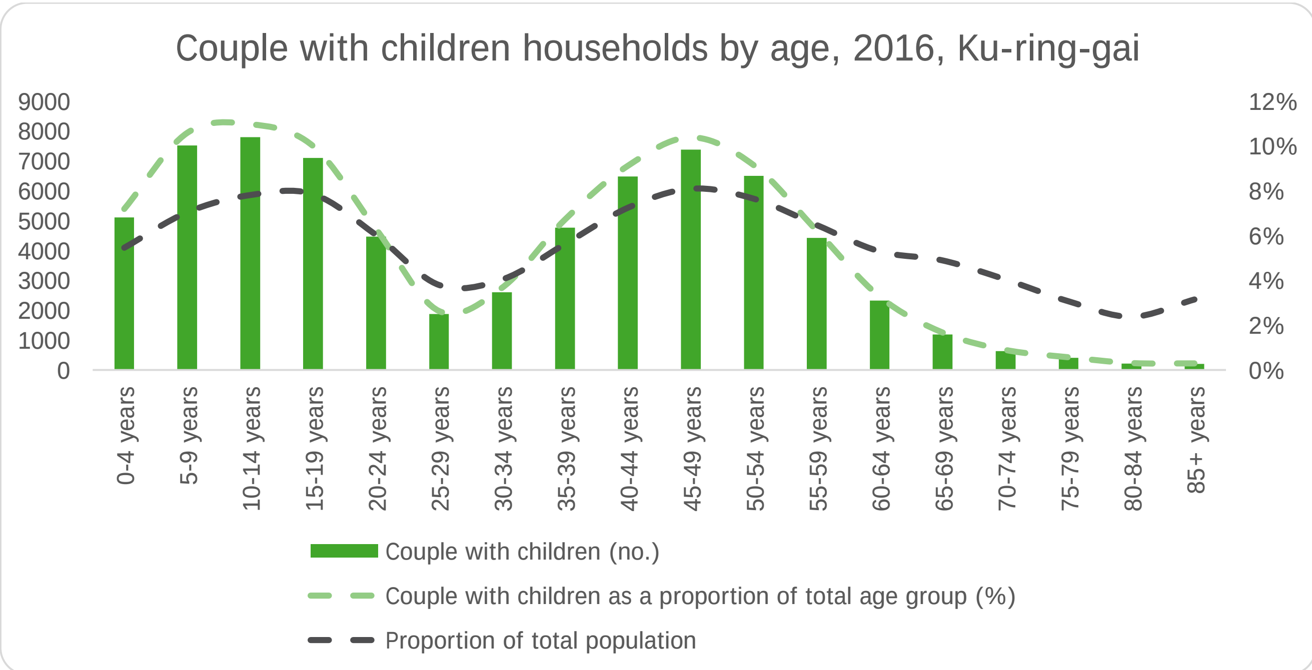
Figure 34 Lone person household by age



Source: Australian Bureau of Statistics, TableBuilder Pro, variables, HCFMD, AGE5P, 'Ku-ring-gai (A)', (accessed December 2016)

The peak age for couple with children households is the 45 – 49 age groups (more established families), and clearly the housing choice of that profile needs to be understood. See **Section 8**. However, it should also be noted that there are couple with children households in the 25 – 34-year old age profile and the housing choice of this age group also needs to be examined as part of the beginning family cohort. See **Section 6.**

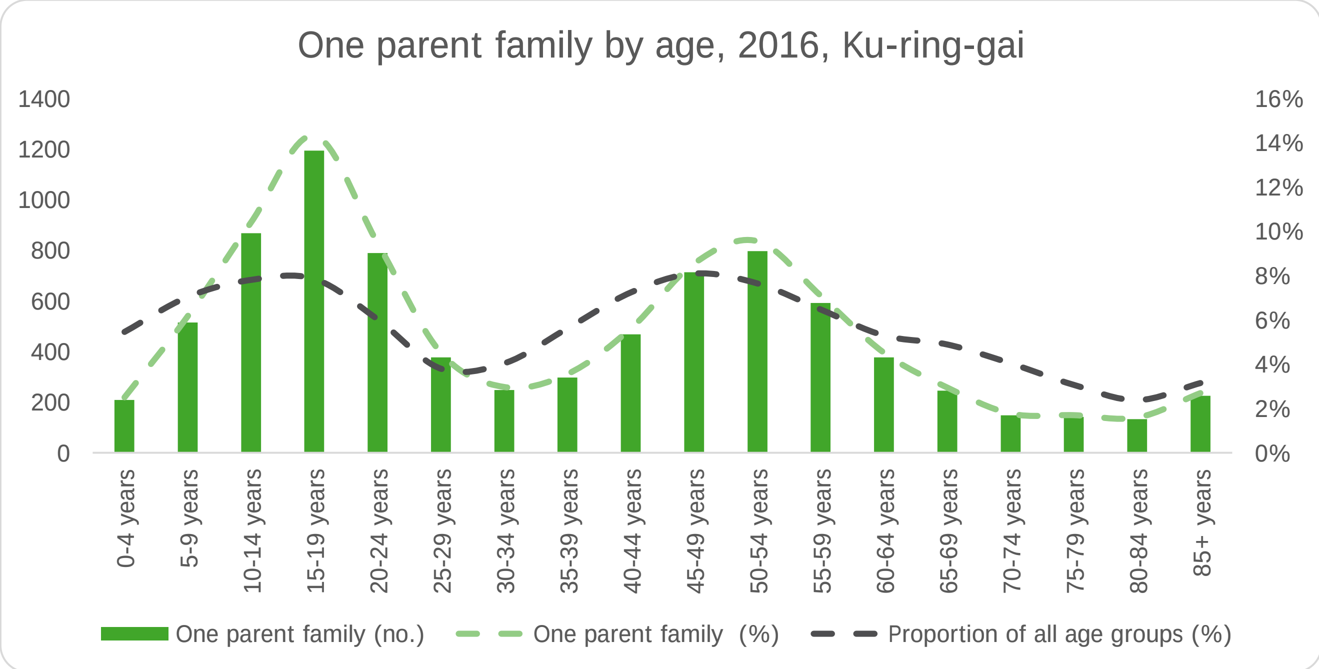
Figure 35 Couple with children households by age



Source: Australian Bureau of Statistics, TableBuilder Pro, variables, HCFMD, AGE5P, 'Ku-ring-gai (A)', (accessed December 2016)

The age profile of one parent families clearly indicates that that the peak is at the 50-54 age group and there is clearly a pattern of 1 to 2 children per household. See **Figure 37**. Understanding the dwelling choice, affordability and average household size for this cohort is undertaken in **Section 7**.

Figure 36 One parent family by age

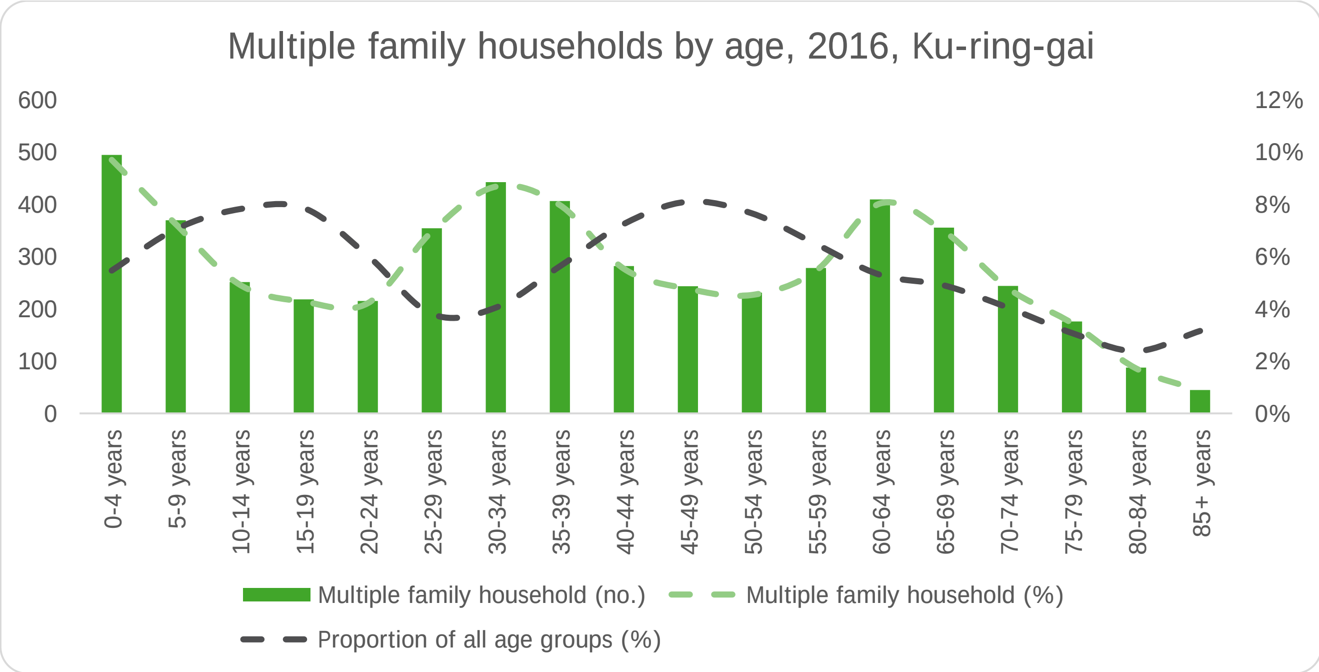


Source: Australian Bureau of Statistics, TableBuilder Pro, variables, HCFMD, AGE5P, 'Ku-ring-gai (A)', (accessed December 2016)

Multiple family household age profiles (see **Figure 38**) clearly indicate a high likelihood that the 350 or so households in this type of formation in Ku-ring-gai are multi-family in nature (i.e. with three age group peaks). However, the rate of this type of household formation is expected to remain steady in Ku-ring-gai to 2036. Only approximately 4 – 5% of people in older age groups live in this type of household.

However, it should be noted there is a significant peak in younger children in this type of household type (see **Figure 38**). This could be either indicative of multi-family household forming then dissolving as children age, or that this type of household is increasing. As the numbers are low for this type of household, it is not possible to determine this trend.

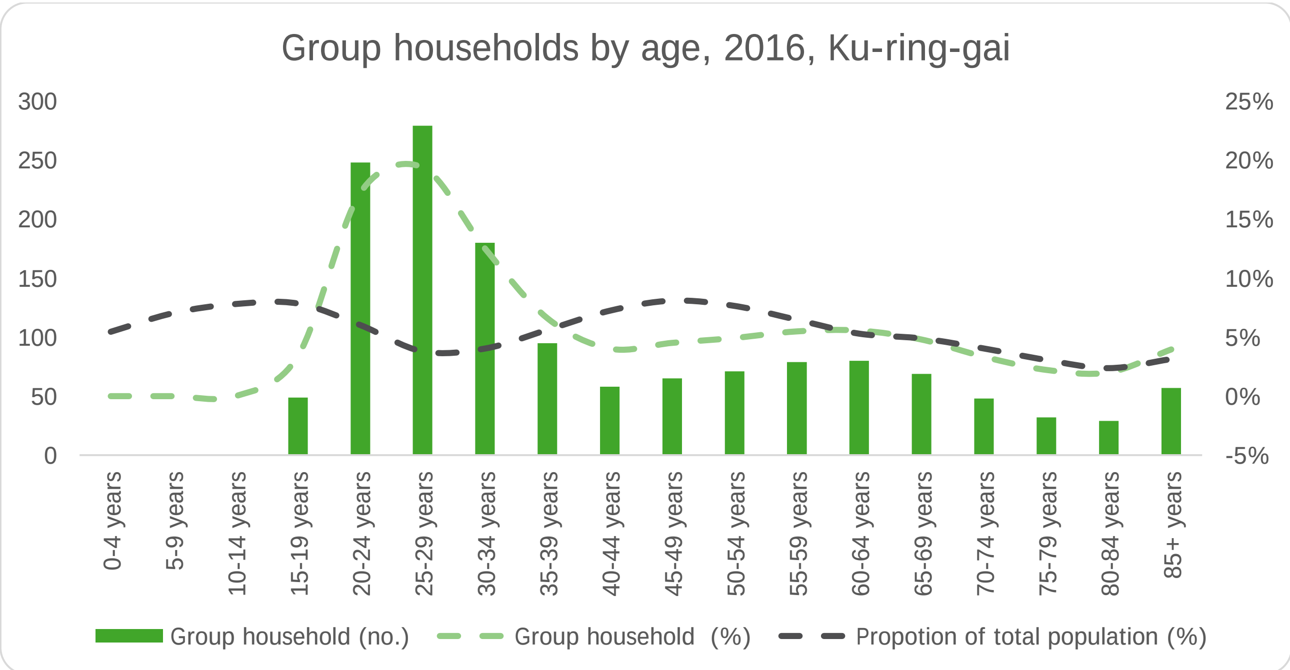
Figure 37 Multiple family household by age



Source: Australian Bureau of Statistics, TableBuilder Pro, variables, HCFMD, AGE5P, 'Ku-ring-gai (A)', (accessed December 2016)

Group households peak at the 20 - 35-year-old age likely due to affordability constraints. This is further explored in **Section 6**. Of perhaps greater interest is the minor peak at the 55 to 69-year mark which would indicate some household formation for affordability in the older age groups or potentially living with a carer.

Figure 38 Group household by age



Source: Australian Bureau of Statistics, TableBuilder Pro, variables, HCFMD, AGE5P, 'Ku-ring-gai (A)', (accessed December 2016)

3.7 Ku-ring-gai's current dwelling stock profile

Summary and key implications for the Housing Needs Study

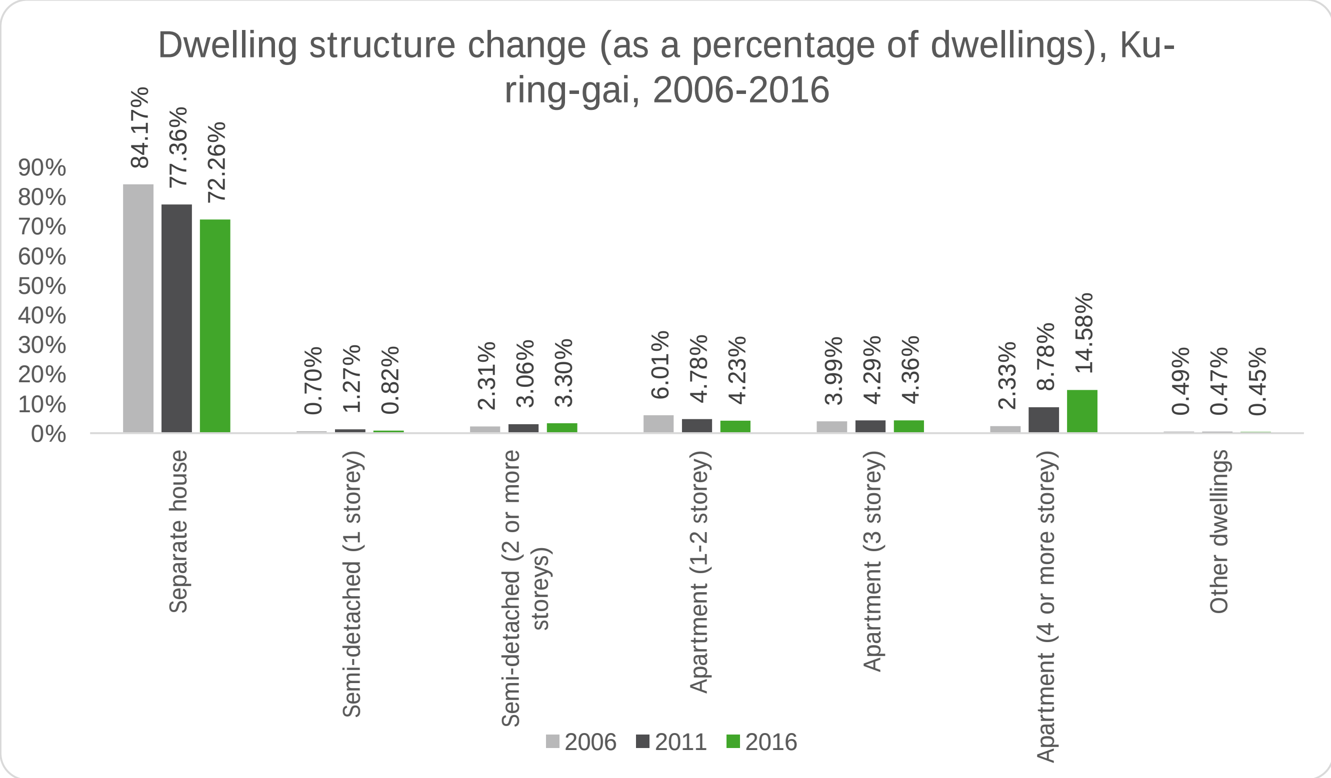
- In 2016 the dominant dwelling type in the Ku-ring-gai LGA is by far separate dwellings (approximately 73%). This is a far greater percentage than either the North District (53%) and Greater Sydney (54%). This could indicate a significant mismatch between the growth in smaller households (5,500 additional lone and couple-only households) and current unmet demand from those household types.
- Ku-ring-gai's housing stock has a very small proportion of terrace/town-houses (approximately 4%) and flat/apartments (23%) when compared with the North District (10% townhouse/terrace and 37% flats/apartments) and Greater Sydney (14% townhouse/terrace and 31% flats/apartments). There may be significant unmet demand from a number of cohorts for this type of stock and is analysed further in **Section 5** and **Section 8**.
- The most substantial rise in dwellings by number of bedrooms in Ku-ring-gai has been 2-bedroom stock (approximately 2,554 additional dwellings between 2006 and 2016). The next most substantial rise is in 5-bedroom stock, while 3 and 4-bedroom stock levels declined by between 3.5% and 4.5% in that same period. Considering the expected rise in lone person households, a greater percentage of one-bedroom dwellings may be required, particularly if there are increasing affordability issues. However, this could be offset by increased older couple households downsizing, and then one of the partners staying in the dwelling if a partner dies. The rise in 5-bedroom stock and declining levels of 3 and 4-bedroom stock may also raise further mismatch in households with children and may exacerbate affordability concerns in the future.
- There is a potential significant mismatch between dwelling types and the likely housing needs of an ageing population with approximately 5,500 additional lone and couple-only households forecast in the LGA by 2036.
- Families with children household sizes are declining, but there is low growth in three and four-bedroom stock.
- The most marked proportional decrease in people living in separate dwellings is in the 25- 39 age group. Data indicates apartments as being of increasing importance, likely for either lifestyle or affordability considerations. There is also a marked decrease in the proportion of very young children living in separate dwellings which is indicative of young, starting families increasingly residing in other forms of accommodation. There are corresponding increases in 0-4 years living in apartments, 4-storey and above in particular.
- There are declines in percentage of people residing in separate dwellings in all older age brackets - 50 year plus to the 80-year bracket. This would be indicative of an increasing downsizing trend and there is a corresponding rise of this age group living in other typologies.
- Over 65 people are the most represented age group in semi-detached dwelling typologies. There is likely an under-representation of other age profile households in this stock that the Housing Strategy may be able to address.
- In apartments over 4- storeys there has been ten-fold growth in the proportion of younger age groups (around 35 years) choosing to reside in this typology of dwelling with 900% increase between 2006 - 2016
- There has been substantial rise in all age groups between 50 and 80 years choosing to reside in 4-storey or above apartments with a 600% increase.

3.7.1 Dwelling structure

The following graph provides a breakdown of the number of various typologies of dwellings in Ku-ring-gai. See **Figure 40**. The LGA remains dominated by single detached dwellings accounting for approximately 73% of all stock, but this has fallen from just over 84% in 2006.

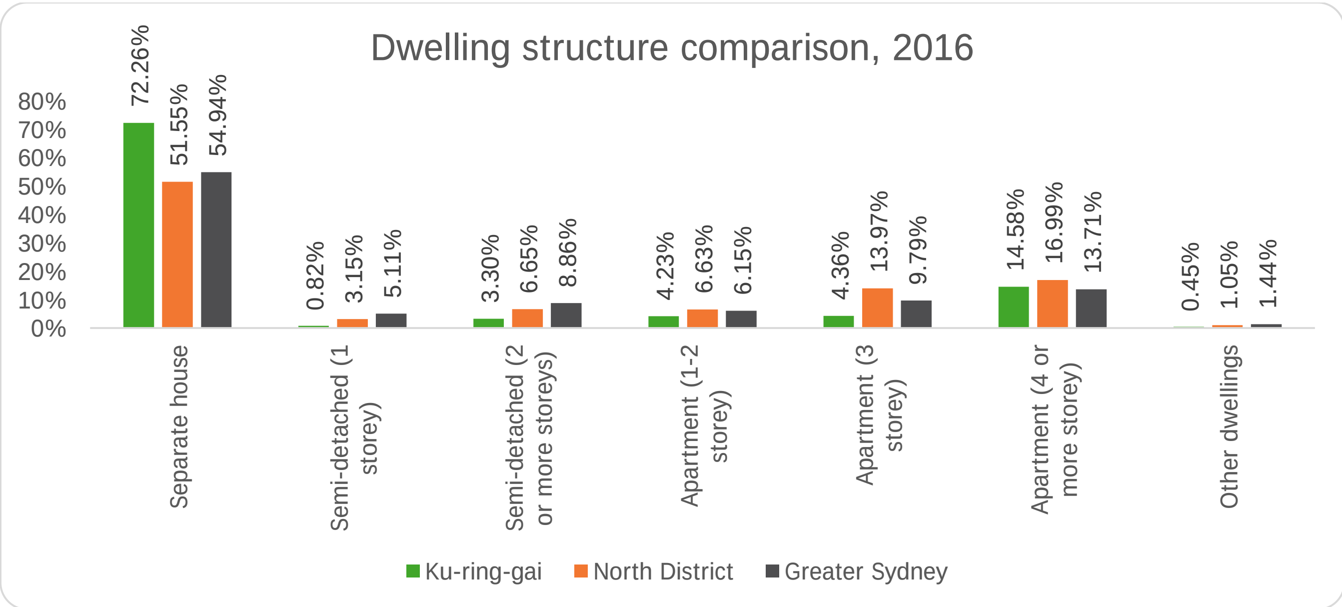
All other housing typologies have remained relatively constant since 2006 with the exception of the percentage of apartments in buildings 4-storeys or more which has risen from 2.33% of stock to nearly 15%. However, the overall percentage of apartment typologies compared to the North District and Greater Sydney is lower. See **Figure 41.**

Figure 39 Dwelling structure change (as a percentage of dwellings)



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 40 Dwelling structure comparison



Source: ABS –TableBuilder Pro, 2016, variables, dwelling structure, 'Ku-ring-gai (A)', 'Greater Sydney' and North District (accessed December 2019)

Note: North District has been calculated by summing the totals of each LGA in the North District.

Despite growth in apartments, as at 2016 only approximately 18% of housing stock is one or two bedroom. The relative percentage of 3-bedroom stock also fell. Considering that by 2036, 42% of households will be lone or couple only, this indicates a significantly potential mismatch between dwelling stock and household types. Generally, apartment stock is the most recently developed. Only approximately 13% of the growth in that stock was 1 bedroom. See **Table 8**. For affordability considerations of lone person households, there may be a systemic mismatch in dwelling type. However, if downsizing occurs as an older couple and one partner dies, this would offset this as it would be less likely to trigger further downsizing.

3 and 4-bedroom stock remains the most numerous bedroom configurations in dwellings. While in absolute numbers, the greatest growth was in 2-bedroom units (2,254) and the second greatest increase was in 5-bedroom stock (1,634). It is assumed that much of the later increase is the addition to or replacements of existing stock. See **Table 8.**

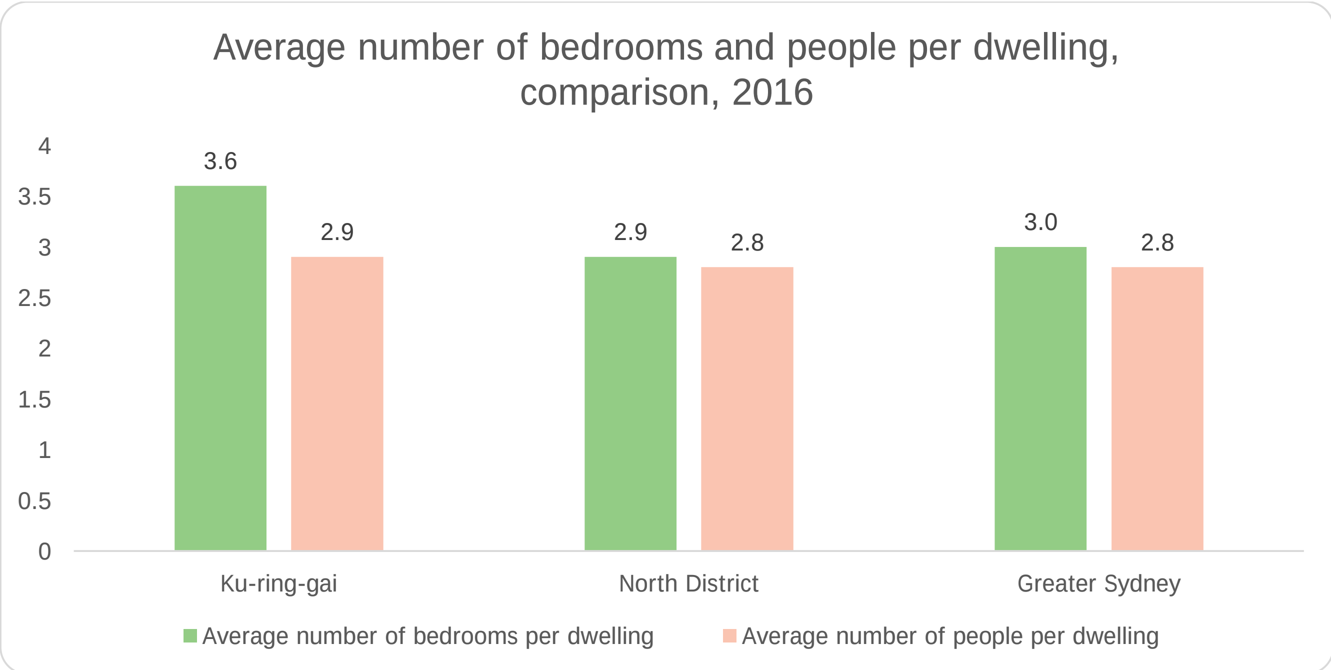
There is a high discrepancy between number of bedrooms and number of occupants in the Ku-ring-gai LGA compared to both the North District and Greater Sydney. See **Figure 42.**

Table 8 Number of bedrooms per dwelling

Number of bedrooms per dwelling, 2006-2016										
	One		Two		Three		Four		Five or more	
2006	582	1.77%	3,365	10.24%	10,655	32.43%	12,482	37.99%	5,690	17.32%
2016	1304	3.41%	5,619	14.69%	10,789	28.20%	13,160	34.40%	7,324	19.14%
Change 2006-2016	722	1.64%	2,254	4.45%	134	-4.23%	678	-3.59%	1,634	1.83%

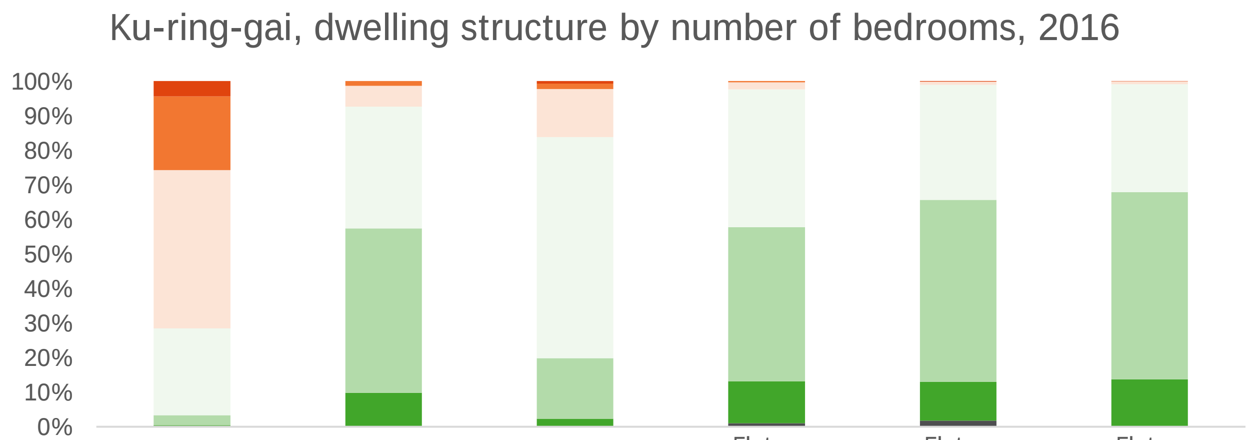
Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Figure 41 Average number of bedrooms and people per dwelling



Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Figure 42 Dwelling structure by number of bedrooms



	Separate house	Semi-detached (1 storey)	Semi-detached (2 storey)	Flat or apartment (1-2 storey)	Flat or apartment (3 storey)	Flat or apartment (4+ storey)
Six +	4.45%	0.00%	0.73%	0.00%	0.19%	0.05%
Five	21.36%	1.41%	1.61%	0.41%	0.00%	0.00%
Four	45.68%	5.99%	13.86%	1.99%	0.90%	0.90%
Three	25.11%	35.21%	63.98%	39.86%	33.29%	31.24%
Two	2.93%	47.54%	17.49%	44.54%	52.63%	54.04%
One	0.40%	9.86%	2.34%	12.16%	11.18%	13.71%
None	0.07%	0.00%	0.00%	1.03%	1.80%	0.05%

Source: ABS –TableBuilder Pro, 2016, variables number of bedrooms, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

3.7.2 Dwelling occupancy by typology of housing

» Based number of usual residents, the average household size living in the various typologies is:

> Separate dwelling – 2.9 persons

> Semi-detached (1 storey) – 1.6 persons

> Semi-detached (2 storey or above) – 2.0 persons

> Apartment (1 -2 storey) – 1.5 persons

> Apartment (3 storey) – 1.75 persons

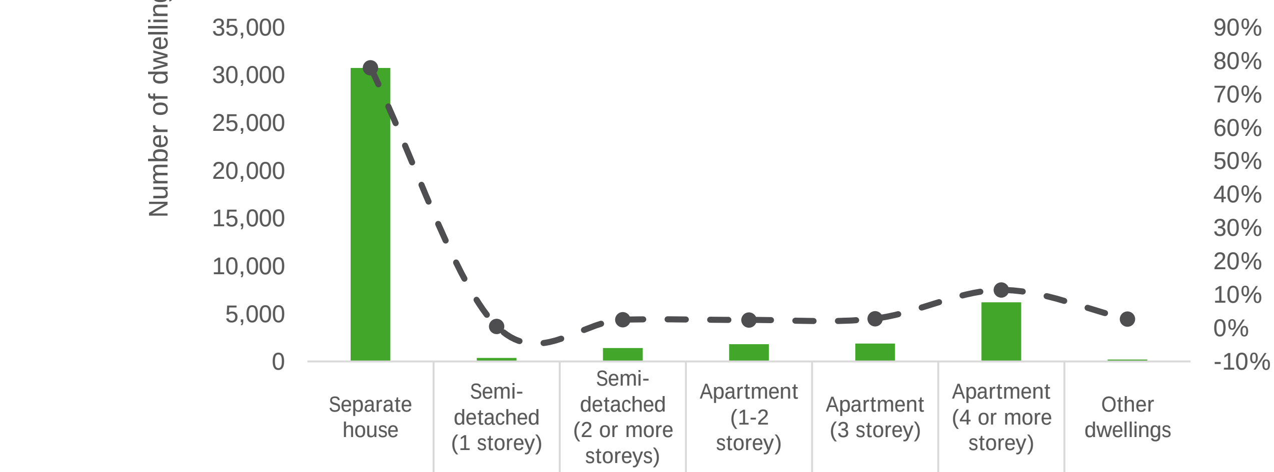
> Apartment (4 storeys and above) – 2.1 persons

Note: this is calculated by the number of people reporting they lived in each dwelling typology by the numbers of dwelling in each typology.

» Other than separate dwellings which have the highest occupancy rate, relatively high occupancy of apartments above 4-storeys and semi-detached dwellings 2 storeys or above, would indicate there is some growth in relatively larger households residing in these forms of dwellings. This may indicate a growing trend considering these typologies of stock are more likely to be the most recently developed.

» Less than 3% of the population live in semi-detached typologies (approximately 4% of stock).

Figure 43 Number of dwelling types, percentage of dwellings and percentage of population



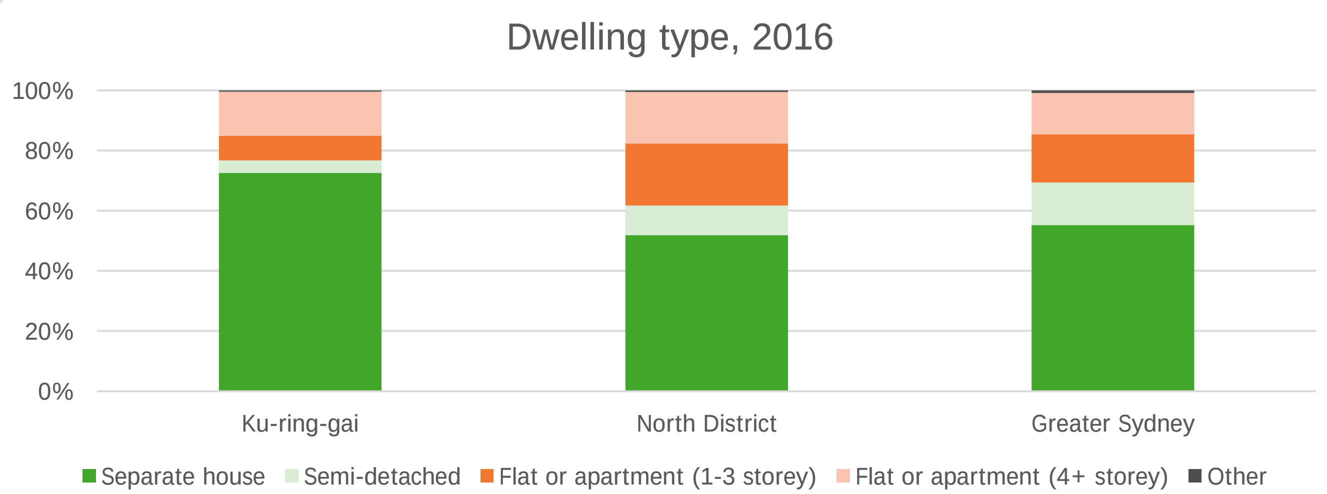
	Separate house	Semi-detached (1 storey)	Semi-detached (2 or more storeys)	Apartment (1-2 storey)	Apartment (3 storey)	Apartment (4 or more storey)	Other dwellings
Dwelling type	30,721	347	1,405	1,799	1,852	6,197	190
Per cent of population	77.79%	0.48%	2.48%	2.40%	2.82%	11.36%	2.65%

Source: ABS –TableBuilder Pro, 2016, STRD, Place of enumeration (MB), 'Ku-ring-gai (A)' (accessed December 2019)

3.7.3 North District

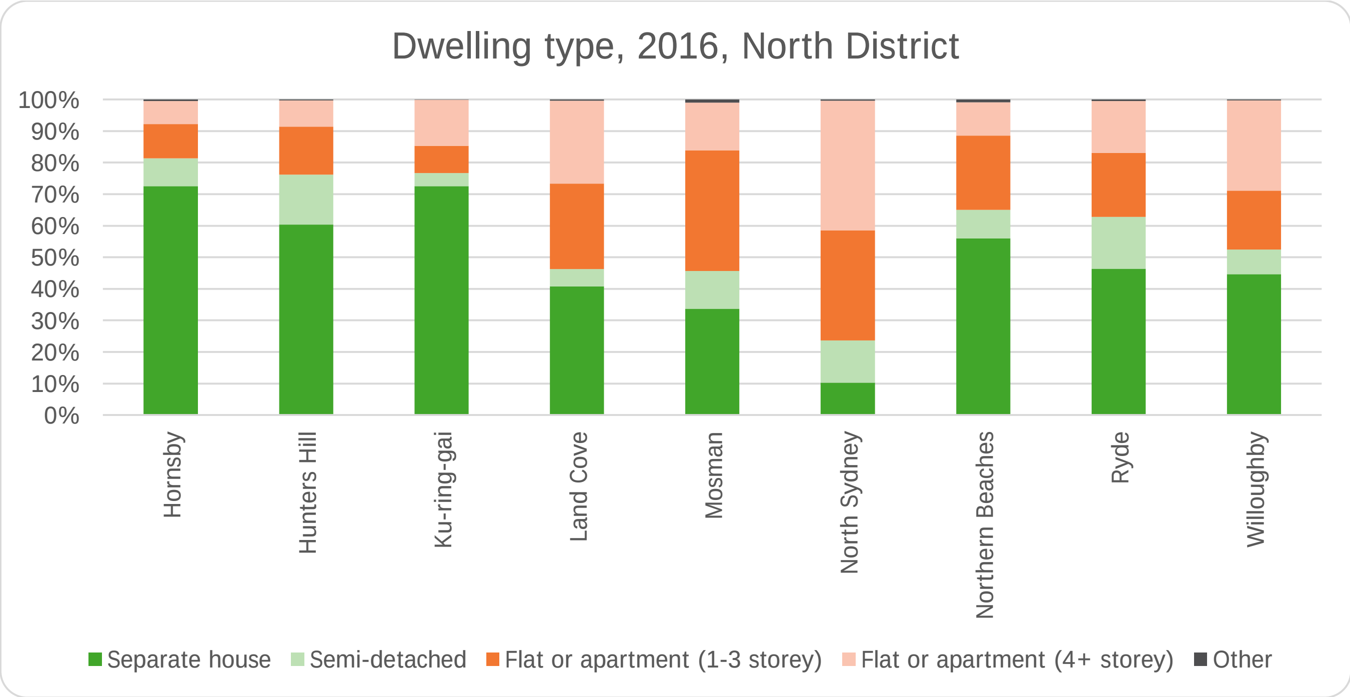
Compared to the North District, Ku-ring-gai LGA has less housing diversity than surrounding LGAs. Only the Hornsby LGA has a similar proportion of separate dwellings but also has a greater proportion of semi-detached style dwellings. The North District has a lower proportion of separate dwellings and a higher proportion of all other dwelling types as does Greater Sydney. There are similar proportions of 4 or more storey apartments across both the Ku-ring-gai LGA and the North District but significantly less semi-detached and low-scale apartment typologies.

Figure 44 Dwelling type



Source: ABS –TableBuilder Pro, 2016, variables, STRD Dwelling Structure, GCCSA 'Greater Sydney, 'Hornsby (A)', 'Hunters Hill (A)', Ku-ring-gai (A)', Lane Cove (A)', 'Mosman (A)', 'North Sydney (A)', 'Northern Beaches (A)', 'Ryde (A)', 'Willoughby (A)', (accessed December 2019)

Figure 45 Dwelling type, North District



Source: ABS –TableBuilder Pro, 2016, variables, STRD Dwelling Structure, 'Hornsby (A)', 'Hunters Hill (A)', Ku-ring-gai (A)', Lane Cove (A)', 'Mosman (A)', 'North Sydney (A)', 'Northern Beaches (A)', 'Ryde (A)', 'Willoughby (A)', (accessed December 2019)

3.8 What changes have occurred between 2006 – 2016 in types of housing preference

Summary and implications for the Housing Needs Analysis

» All age cohorts experienced a decline in residing in separate dwellings with the exception of the over 80s. This includes children. Further investigation as to the types of dwellings being chosen is required. See **Section 8.**

» There is a strong representation in over 55s in semi-detached style dwellings with the average age being 58 years compared to 41 years for separate dwellings and 35 years for apartments. There was a proportional decline in in younger adult cohorts occupying these types of dwellings indicating that the low levels of stock (around 4%) make it unaffordable for this age cohort, and that increases in stock of this type may provide more opportunity for younger adults and families. This is further investigated in **Sections 5** (housing need for the older population) and **Section 8** (housing need for established families).

» The low average age in apartments, and the significantly increase in the proportion of this age group choosing apartments 4 storey or above, may account for the growth of young adults in the 2006 – 2016 period. There was a 900% growth in the proportion of 30-34-year age range living in these types of apartments in Ku-ring-gai. Analysis of the dwellings required to maintain or further support this cohort in the LGA is provided in **Section 6**.

» Young starting out families appear to be residing in apartments, particularly in the 4 storey or above (15% of 0-4 years of age children were living in apartments as at 2016). The proportion of children declines with their age, indicating it is an important source of dwelling for young families. However, it should be also noted that there are growing numbers of other school age children in 4-storey or above apartments as well. See **Section 6**.

Separate dwellings

41 years is the median age for people living in separate dwellings, similar to the median age of the LGA as would be expected.

Between 2006 and 2016, almost all age groups experienced a decrease in the proportion of residents in separate dwellings. See **Figure 47**. Major changes were experienced in:

» The 0-4 age group which decreased from 91.71 per cent to 65.76 per cent

» The 5-9 age group which decreased from 94.66 per cent to 85.07 per cent

» The 20-24 age group which decreased from 86.43 per cent to 69.87 per cent

» The 25-29 age group which decreased from 77.18 per cent to 55.36 per cent

» The 30-34 age group which decreased from 78.78 per cent to 54.48 per cent.

The most marked decrease in people living in separate dwellings is in the 25- 39 age group. This is indicative of other types of dwellings being of increasing importance, likely for either lifestyle or affordability considerations. There is also a marked decrease in the proportion of very young children living in separate dwellings which is indicative of young families increasingly residing in other forms of accommodation.

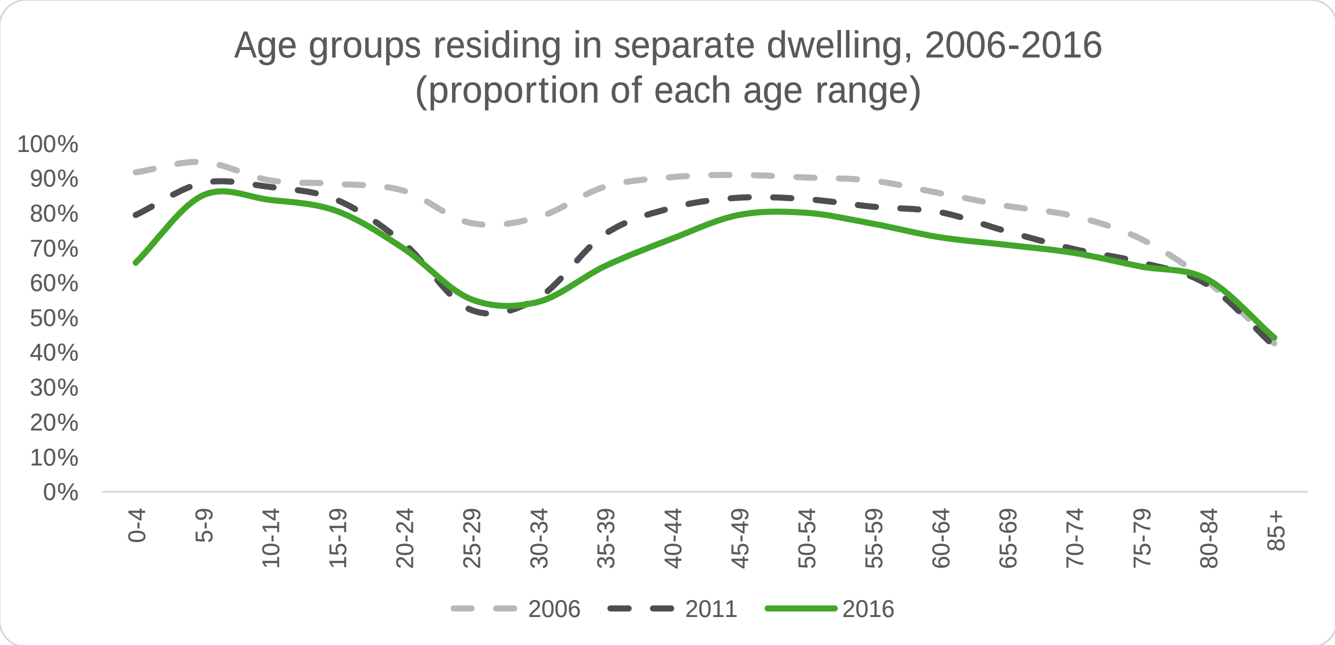
Only two age groups experienced a minor increase in the proportion of residents in separate dwellings. These were:

» 80-84 which increased from 60.42% to 61.02%

» 85+ which increased from 42.61% to 44.26%.

However, there are declines in the proportion of people residing in separate dwellings in all age brackets 50 years plus to the 80 year and above bracket. This is indicative that people are increasingly choosing different types of dwellings as they age.

Figure 46 Age groups residing in separate dwellings



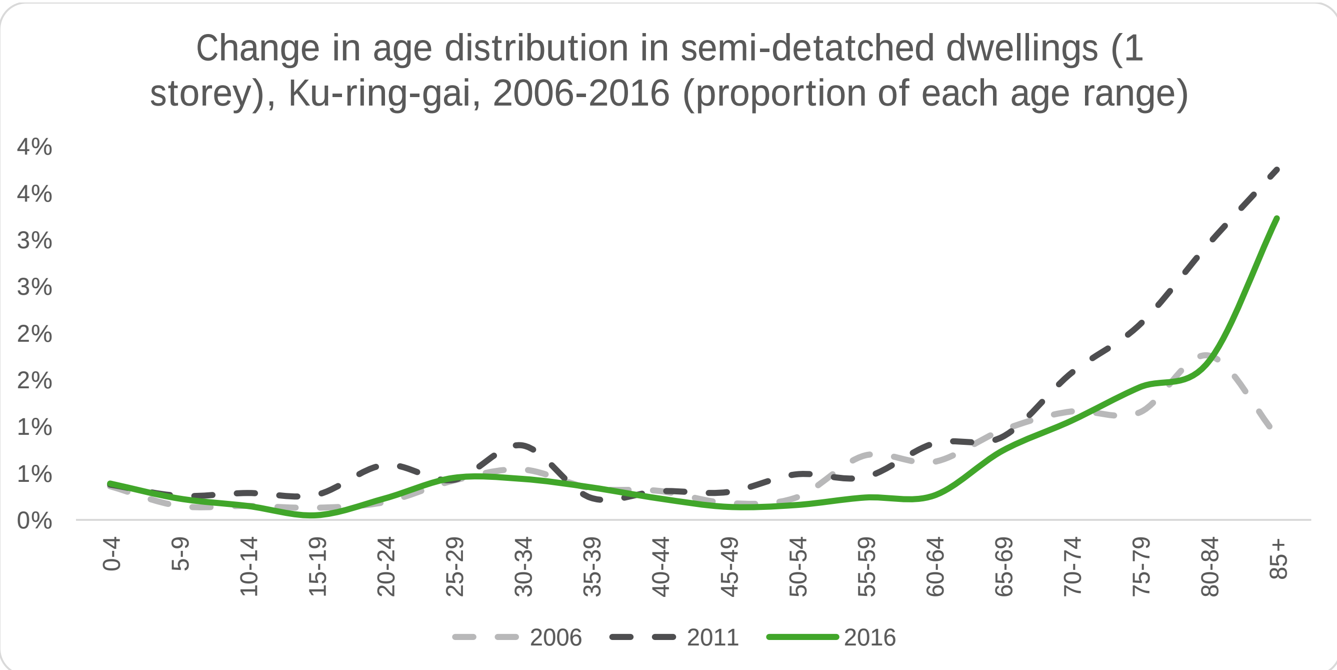
Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, age, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

For semi-detached typologies, the median age rises to 58 years reinforcing how popular this type of dwelling is for older cohorts. See **Figures 48** and **49** for illustrations of the age distribution of people living in this housing stock.

Medium density dwellings in the form of semi-detached dwellings are increasingly attracting a greater proportion of the over 65s.

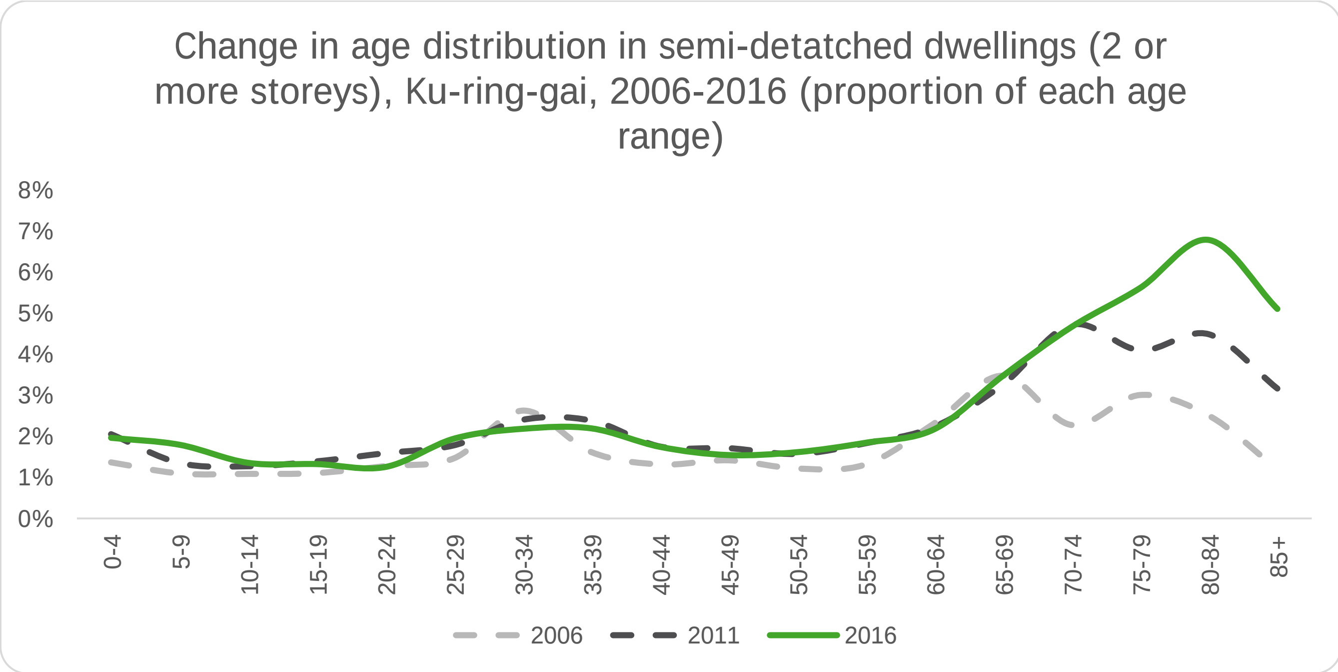
Medium density residential living appears to have an increased attraction to the 30-34 age range but this may be limited due to the low levels of stock (less than 4% and some stock being Seniors Housing). Competition from older, more established age ranges may limit the affordability of this housing option for younger people.

Figure 47 Change in age distribution in semi-detached dwellings (1 storey)



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, age, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 48 Change in age distribution in semi-detached dwellings (2 or more storeys)

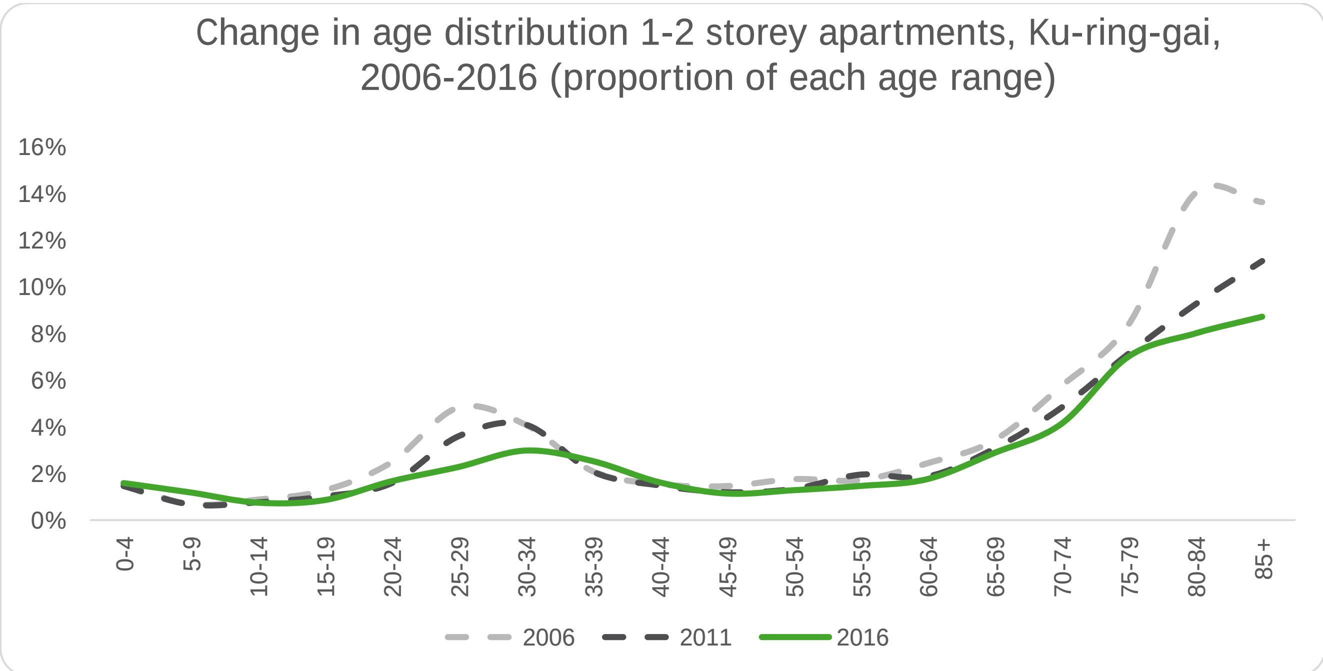


Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, age, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

Low-scale apartments

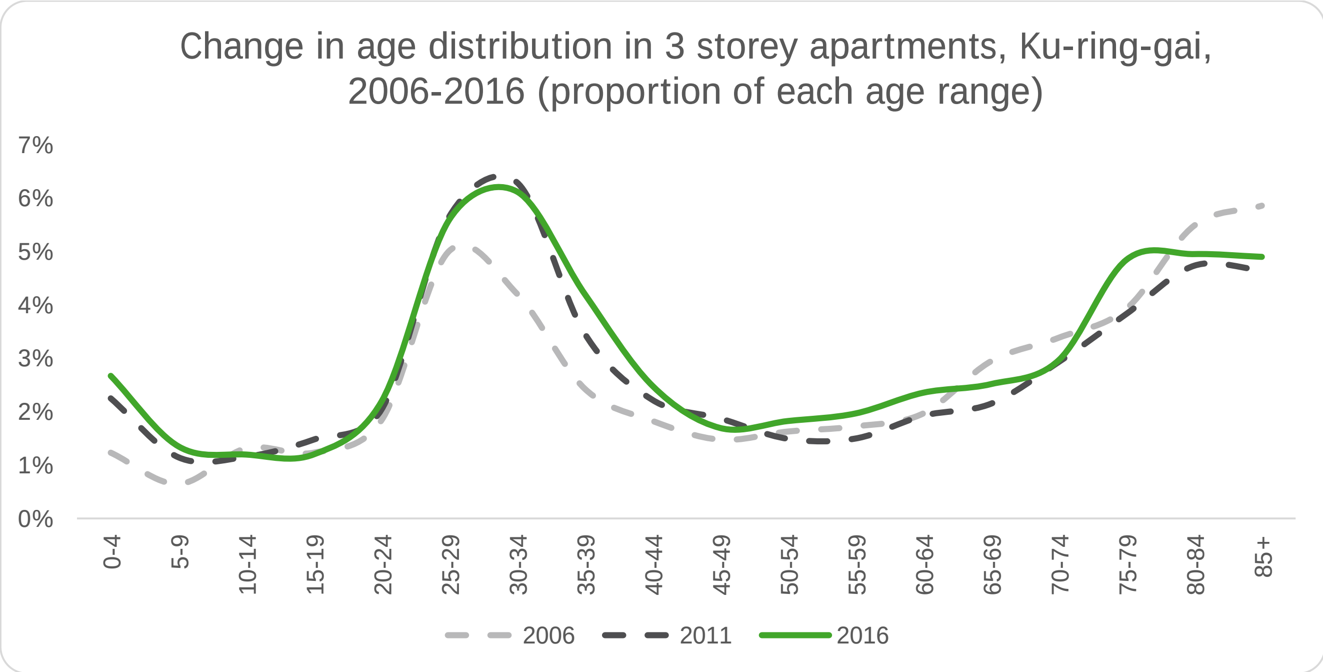
It can be seen that lower-scale apartment stock is popular with 70 plus age ranges (see **Figure 50**), but for 3-storeys the age profile changes to a peak at the 30-34-year-old age range (see **Figure 51**). This may be to be due to accessibility issues for older people in older walk-up stock.

Figure 49 Change in age distribution 1-2 storey apartment



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, age, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 50 Change in age distribution in living in 3 storey apartments



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, age, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

4 storey or more apartments

The median age for people that live in an apartment (4 storey or above) as at 2016 was 35 years, significantly younger than either separate dwellings and semi-detached typologies.

Between 2006 and 2016, the proportion of residents living in 4 or more storey apartments increased across all age groups as shown in **Figure 52.** Significant increased were noted in the:

» 0-4 age group which increased from 0.77 per cent to 14.86 per cent

» 25-29 age group which increased from 1.01 per cent to 8.51 per cent

» 30-34 age group which increased from 3.00 per cent to 32.76 per cent.

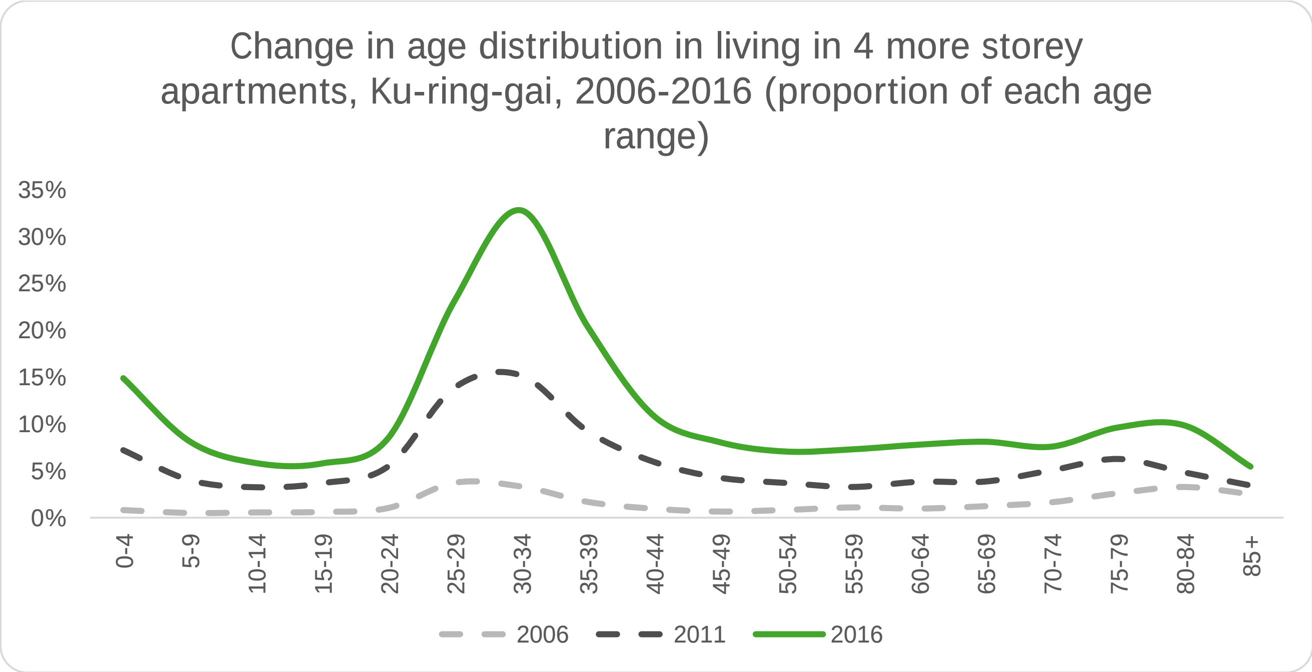
» The 50 to 80 age groups all increased the proportion of residents in these age groups choosing this type of accommodation, generally growing to 10% of the proportion of people in all these age brackets. Apartment living is becoming more important for over 55s with approximately 5,400 people in this cohort choosing this style of accommodation. It is also evident from the age profile of people living in apartment 4-storey and above that people are choosing apartments much sooner compared to the older lower-scale stock of apartments.

It can be seen that this form of dwelling is increasingly the dwelling of choice across all age groups, either for affordability, accessibility or locational perspectives.

Significant increases in the proportion of residents aged 0-4 and 20-34 suggests young families and first home buyers are choosing this form of accommodation. The proportion of children aged 0-4 is roughly half the proportion of residents aged 30-34 which further which is indicative of young families (couples with children) living in 4-storey or more apartments in Ku-ring-gai, particularly in the early family phase (i.e. as children get older some move to other forms of accommodation). A key investigation question is understanding the level of rental versus purchase.

Increasingly, the proportion of people between 50 and 80 years in age are also choosing apartment living. This has increased by approximately seven-fold (600%) across all of these age groups between the 2006 – 2016 period. A growth rate needs to be factored into the housing needs analysis.

Figure 51 Change in age distribution in living in 4 or more storey apartments



Source: ABS –TableBuilder Pro, 2006, 2011, 2016, variables, age, dwelling structure, 'Ku-ring-gai (A)' (accessed December 2019)

3.8.1 What types of dwellings are different household types currently choosing?

Summary and implications for the Housing Needs Study

» There have been very low rates of downsizing, despite the significant proportional growth of older cohorts living in apartments 4-storey and above. Understanding barriers to downsizing is critical and may also require community consultation to further investigate this.

» Approximately 20% of semi-detached 2 storey and above dwellings are occupied by couple with children household, which is likely an under-representation. Considering the age profile in these dwellings, it is likely that younger families may not be able to effectively compete for this stock and some stock is likely to be designated Seniors Living.

» Apartment typologies are particularly important to lone person households with 35 – 40% of stock being occupied by lone person households.

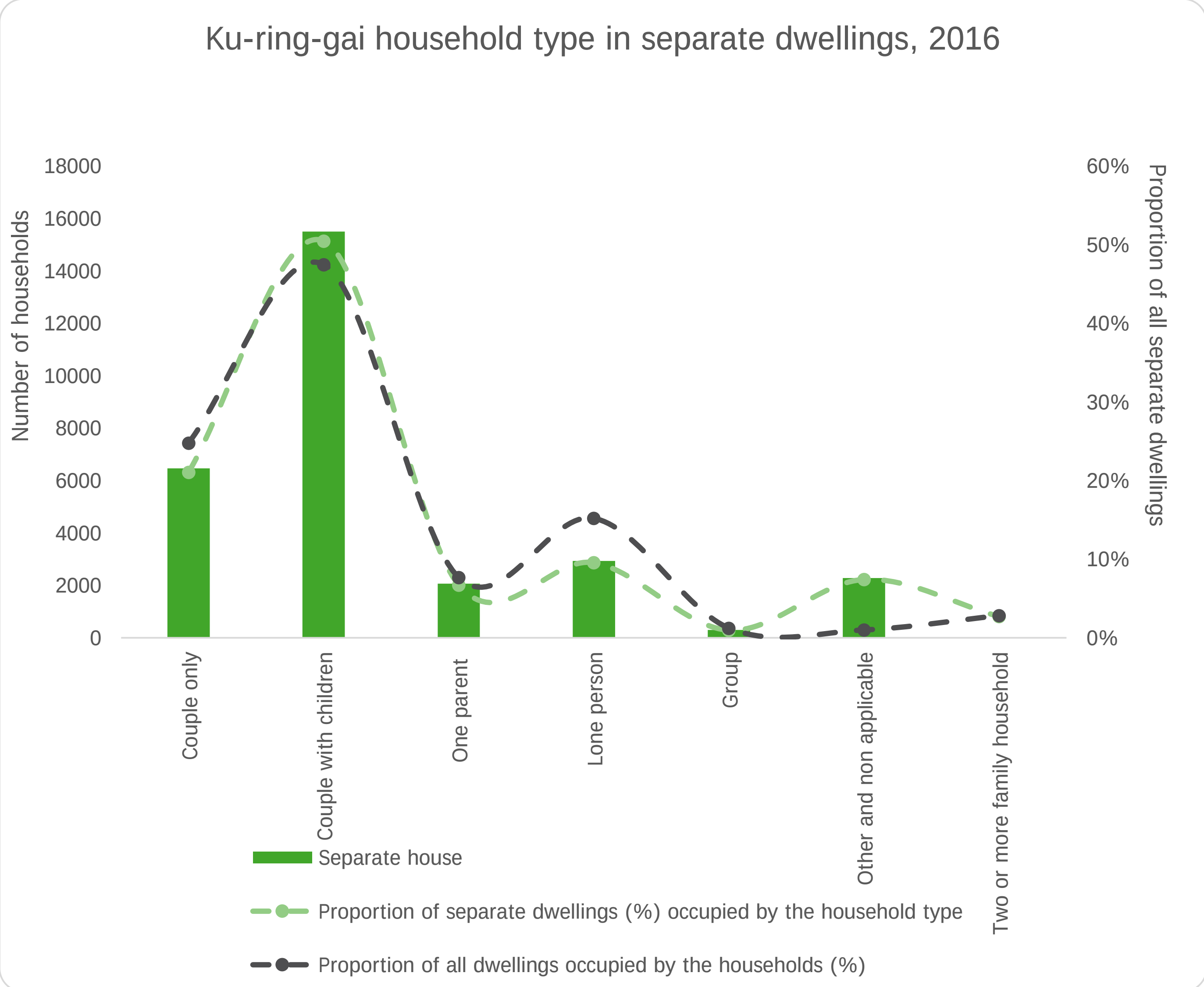
» 26% of apartment stock 4-storey and above is occupied by families with children indicating that it an increasingly important dwelling type for this household type. Household formations in newer apartments (4 storey and above) indicate this is an important source of accommodation for lone person, couple only and couple with children households.

Household types in single dwellings

Key conclusions from this data include:

- There is a strong indication of couples and lone person household residing in separate dwelling
- There is a strong correlation between households with children and the portion of single dwellings inhabited by those households. However, there are proportions of these types of households living in other forms of dwellings that are likely to be indicative of future trends
- Virtually all two-or-more- family households live in separate dwellings.

Figure 52 Ku-ring-gai household type in separate dwellings



Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, dwelling structure, household/family composition, 'Ku-ring-gai (A)' (accessed December 2019)

Household types in 1 storey semi-detached

58 years is the median age for people living in semi-detached/terrace/townhouse/villa style housing indicating that it is a very popular choice among this age group.

There is a significantly higher proportion of lone person households choosing to live in 1-storey semi-detached housing. See **Figure 54**. 37% of these style of dwellings, as at 2016, were occupied by lone person households (15% of all households are lone person households in Ku-ring-gai). This indicates that this style of housing is very popular with lone person households, but may also be a factor of the age of the stock available and development timeframe (i.e. 2 or more storeys likely to have been developed later).

There is a slightly higher proportion of couple-only households choosing to live in 1-storey semi-detached dwellings. Considering the very low level of stock availability (0.48%) there may be extremely strong competition for this type of dwelling and therefore under-representation of some household types, particularly couple-only households.

Figure 53 Ku-ring-gai household type in semi-detached (1 storey)

Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, dwelling structure, household/family composition, 'Ku-ring-gai (A)' (accessed December 2019)

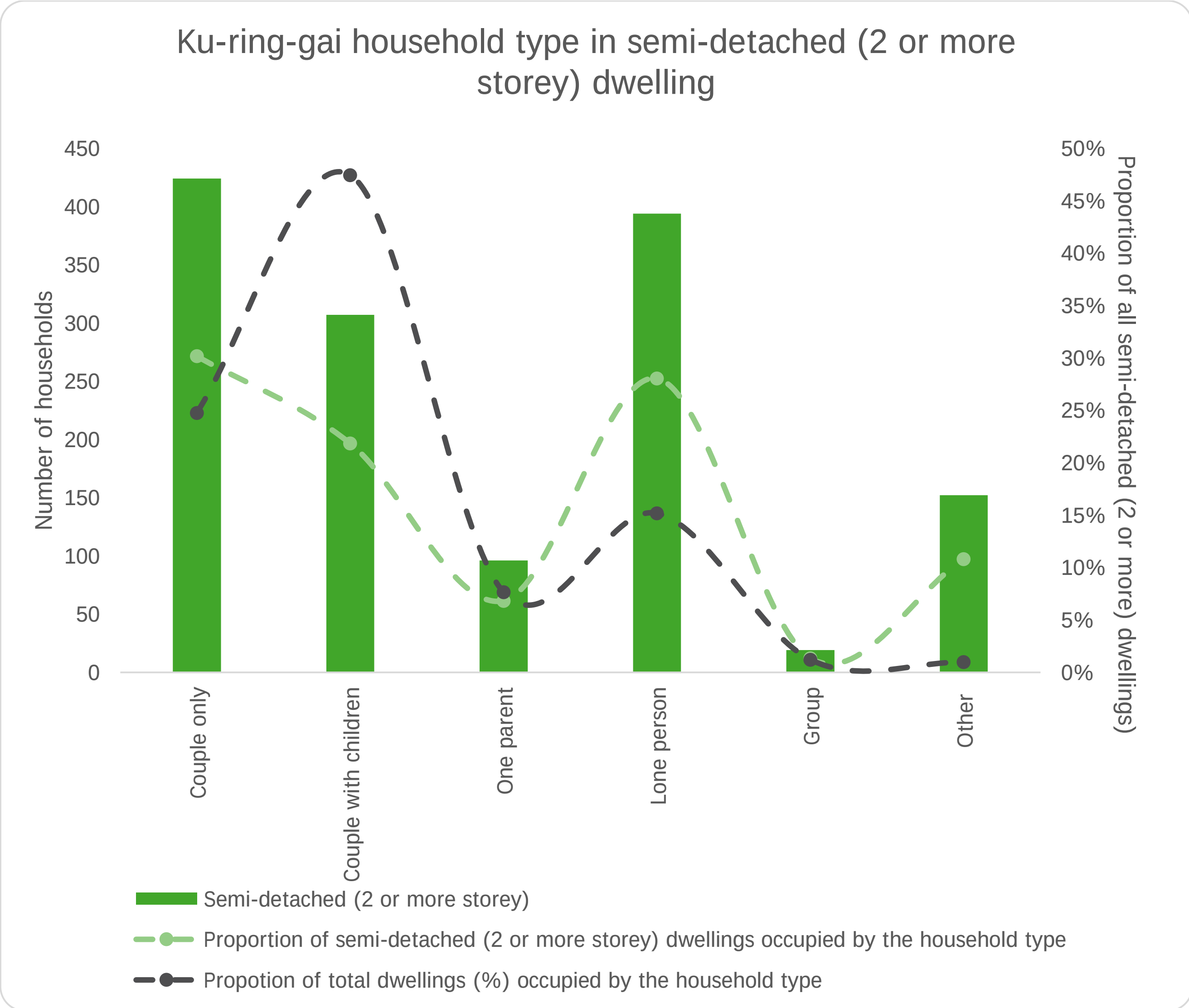
Household types in semi-detached (2 or more storey)

The proportion of stock occupied by various households is shown in **Figure 55**. Couple-only households are more highly represented in semi-detached (2 storey or above) (30% of the stock). Considering the low availability of stock of this type, there could be significant unmet demand from these households

Lone person households are highly represented in this stock occupying 28% of the stock while 15% of all dwellings are occupied by this household type. This indicates a very strong preference for lone households in this type of stock. However, it may also be representative of older couples transitioning to lone person households due to natural lifecycles.

Couple with children households occupy approximately 22% of this stock. Due to the strong competition from other household types and low stock availability, it can be assumed that this household type might be more strongly represented in this dwelling type if greater levels of stock were available.

Figure 54 Ku-ring-gai household type in semi-detached (2 or more storey) dwelling



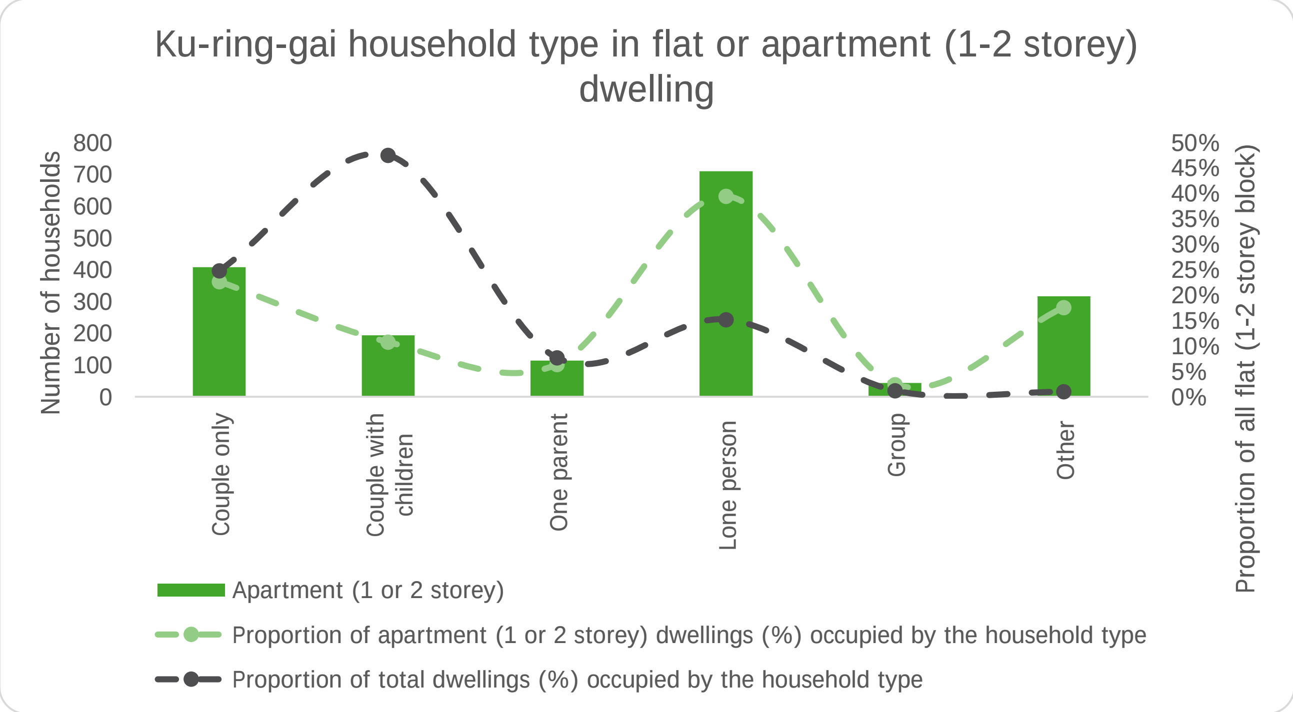
Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, dwelling structure, household/family composition, 'Ku-ring-gai (A)' (accessed December 2019)

Households in apartments

Lone person households are by far the most represented group in 1-2 storey apartments, indicating that this is a very popular choice in this cohort. (See **Figure 56**). 25% of apartments 3-storeys in height are occupied by couples while lone person households occupy 35% of this type of dwelling stock (See **Figure 57**). However, as this stock is generally older, it may not be as clearly indicative of more recent trends in apartment living.

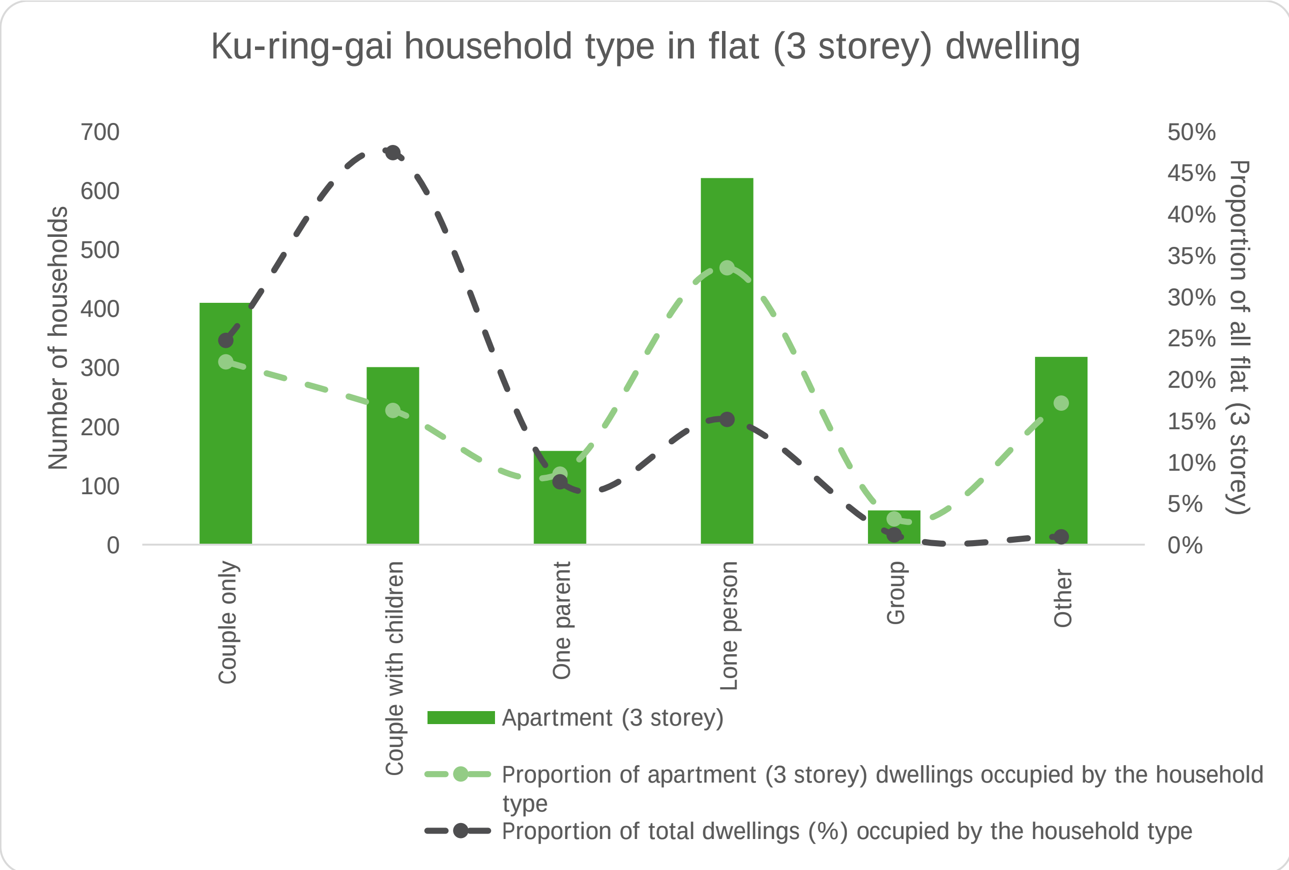
For 4-storey and above apartments (generally newer stock), couple, lone person and couple with children households occupy between 21% and 26% each, with the balance made up from other households. Therefore, this apartment typology is important to all these household types. See **Figure 58.**

Figure 55 Ku-ring-gai household type in flat (1-2 storey) dwelling



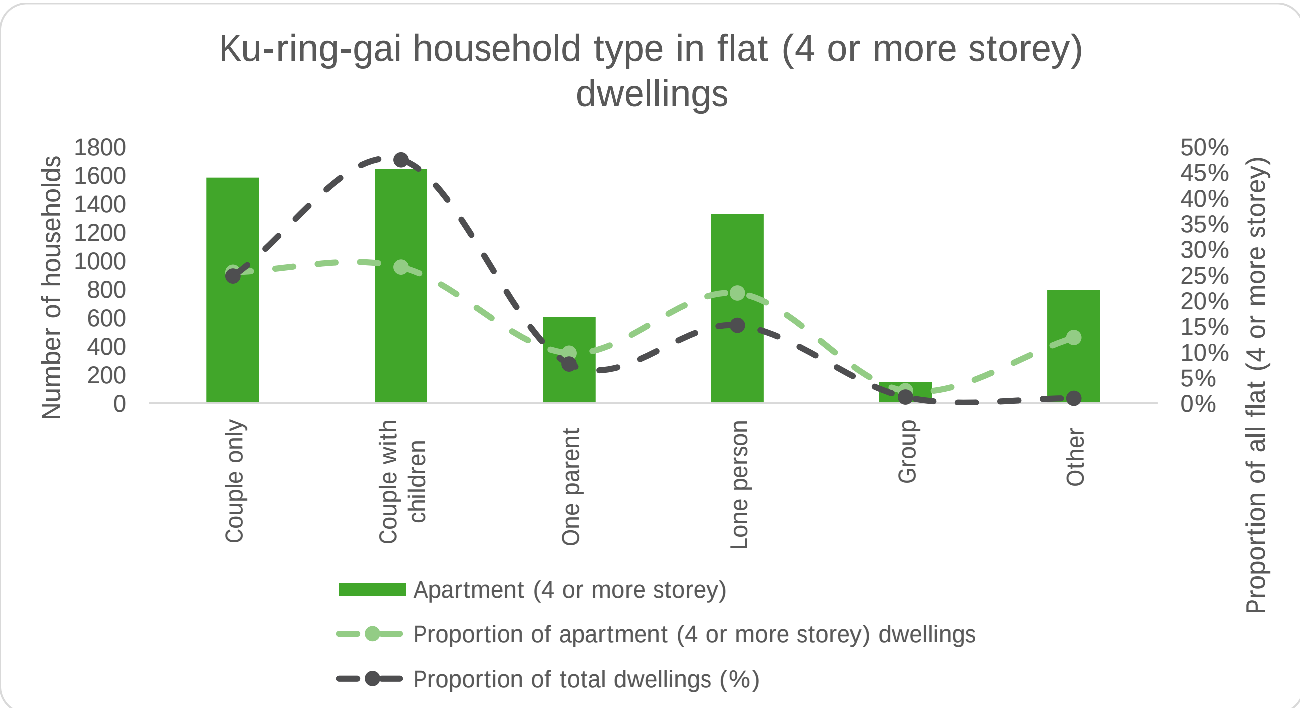
Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, dwelling structure, household/family composition, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 56 Ku-ring-gai household type in flat (3 storey) dwelling



Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, dwelling structure, household/family composition, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 57 Ku-ring-gai household type in flat (4 or more storey) dwellings



Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, dwelling structure, household/family composition, 'Ku-ring-gai (A)' (accessed December 2019)

3.8.2 Over and under-occupancy data

Under-occupancy is also an indicator of any mismatch between dwelling number of bedrooms and household sizes. In this data, the spare bedrooms are the number above the number of people that reside in the dwelling. Therefore, for couple only or couple with children there is likely to be another spare bedroom.

While not all will choose to downsize, it is an indicator of the potential unmet demand for smaller dwelling typologies.

Summary and key implications for the Housing Needs Analysis

» There is little over-occupancy present in the LGA

» Over 16,000 separate dwellings had an under-occupancy of 2 or more bedrooms as of 2016. This is over half of all separate dwellings.

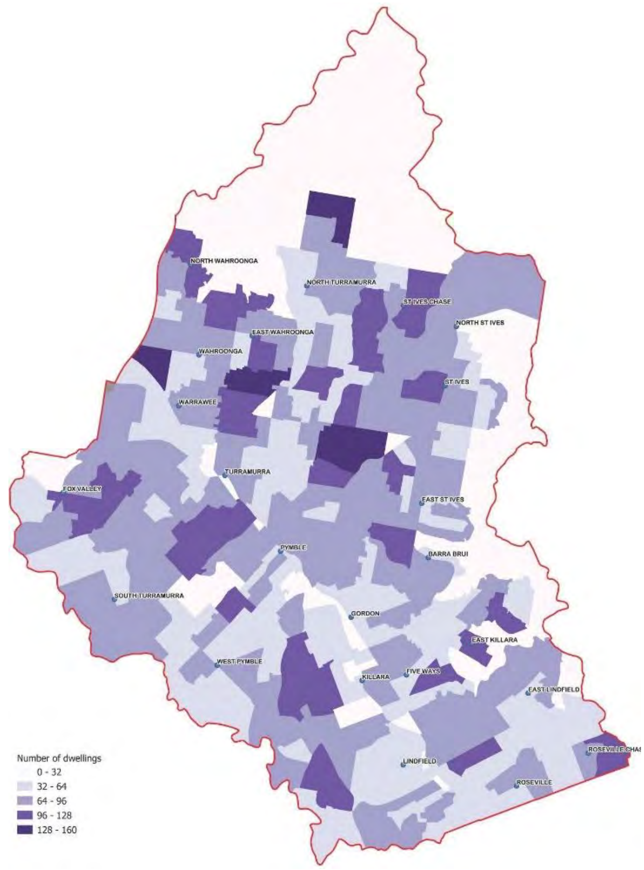
» 89% of separate dwellings have an under-occupancy of 1 or more bedrooms.

» This is likely to mean that there is significant unmet demand for smaller dwelling typologies and may indicate a significant proportion are not downsizing due to a lack of stock, particularly for their preferred typology.

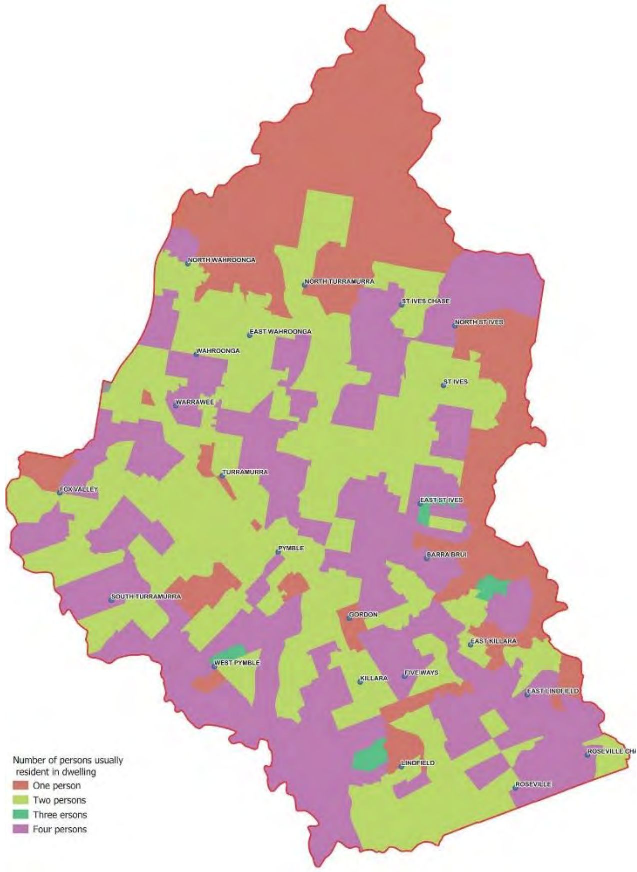
» A map of the spatial distribution of 2 or more bedrooms' spare is provided at **Figure 59**, which is compared to the dominant household type. It shows a general correlation between 2 person households (likely couple only) and significant under-occupancy.

» From a spatial perspective, the dominant household size (2 persons) are generally strongly indicated in separate dwellings along the train line. There are some correlations with under-occupancy. This would indicate that favouring more downsizer options at key centres like Lindfield, Gordon and Turramurra. Areas to the north of the LGA also have considerable under-occupancy, and consideration of options for these areas may also be required. However, it is noted this is less public-transit friendly and not likely to attract a major upgrade like that being considered for St Ives.

Figure 58 Under-occupancy of 2 bedrooms or more compared to the dominant number of people per household in Statistical Area 1's



Under-occupancy by two or more bedrooms Source ABS, 2016



Dominant household size Source: ABS, 2016

Table 9 Over and under occupancy

Over and under-occupancy - No bedrooms needed or spare														
	Separate		Semi-detached (1 storey)		Semi-detached (2 storey)		Flat or apartment (1-2 storey)		Flat or apartment (3 storey)		Flat or apartment (4 or more storey)		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
	2,526	9.53	54	19.71	165	13.74	347	24.73	515	33.95	2,057	39.99	12	54.55
Extra room needed														
	Separate		Semi-detached (1 storey)		Semi-detached (2 storey)		Flat or apartment (1-2 storey)		Flat or apartment (3 storey)		Flat or apartment (4 or more storey)		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
One	251	0.02	11	4.01	11	13.74	36	2.57	62	4.09	438	8.37	0	0.00
Two	44	0.05	0.00	0.00	0	0.00	3	0.21	5	0.33	39	0.75	0	0.00
Three	12	0.17	0.00	0.00	0	0.00	0.00	0.00	0	0.00	0	0.00	0	0.00
Four or more	5	0.95	0.00	0.00	0	0.00	0.00	0.00	0	0.00	0	0.00	0	0.00
Spare bedroom														
	Separate		Semi-detached (1 storey)		Semi-detached (2 storey)		Flat or apartment (1-2 storey)		Flat or apartment (3 storey)		Flat or apartment (4 or more storey)		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
One	7,226	27.26	123	44.89	375	31.22	625	44.55	637	41.99	1,913	36.58	3	13.64
Two	9,270	34.98	82	29.93	581	48.3	383	27.30	280	18.46	777	14.86	5	22.73
Three	5,570	21.02	7	2.55	62	5.16	4	0.29	7	0.46	12	0.23	0	0.00
Four or more	1,601	6.04	0	0.00	9	0.75	0	0.00	3	0.20	0	0.00	0	0.00

Source: ABS – TableBuilder Pro, 2016, variables HOSD, STRD, 'Ku-ring-gai (A)' (Accessed June 2019)

Note: The following categories have not been included in this data display, 'not stated' and 'not applicable'. This data is based on place of enumeration. 'Other' refers to cabins, houseboats, improvised homes, tents, house or flat attached to a shop or office.

While for many households will prefer the larger home, it may also be a significant indicator of the number of households that may wish to downsize over the period to 2036. This is an indicator of the level of potential maximum internal latent demand for smaller dwellings.

4 Household incomes, housing stress and affordability

4.1 Household income in Ku-ring-gai

The median household income in Ku-ring-gai is higher than the North District and Greater Sydney median household income. However, 11,260 households in Ku-ring-gai sit below the Greater Sydney median household income ($91,000). This equates to approximately 34% of all households in the LGA. See **Figure 60.**

Percentages of households in Ku-ring-gai that have household income less than the Greater Sydney median household income is as follows:

» 75% of lone person households

» 37% of couple only households

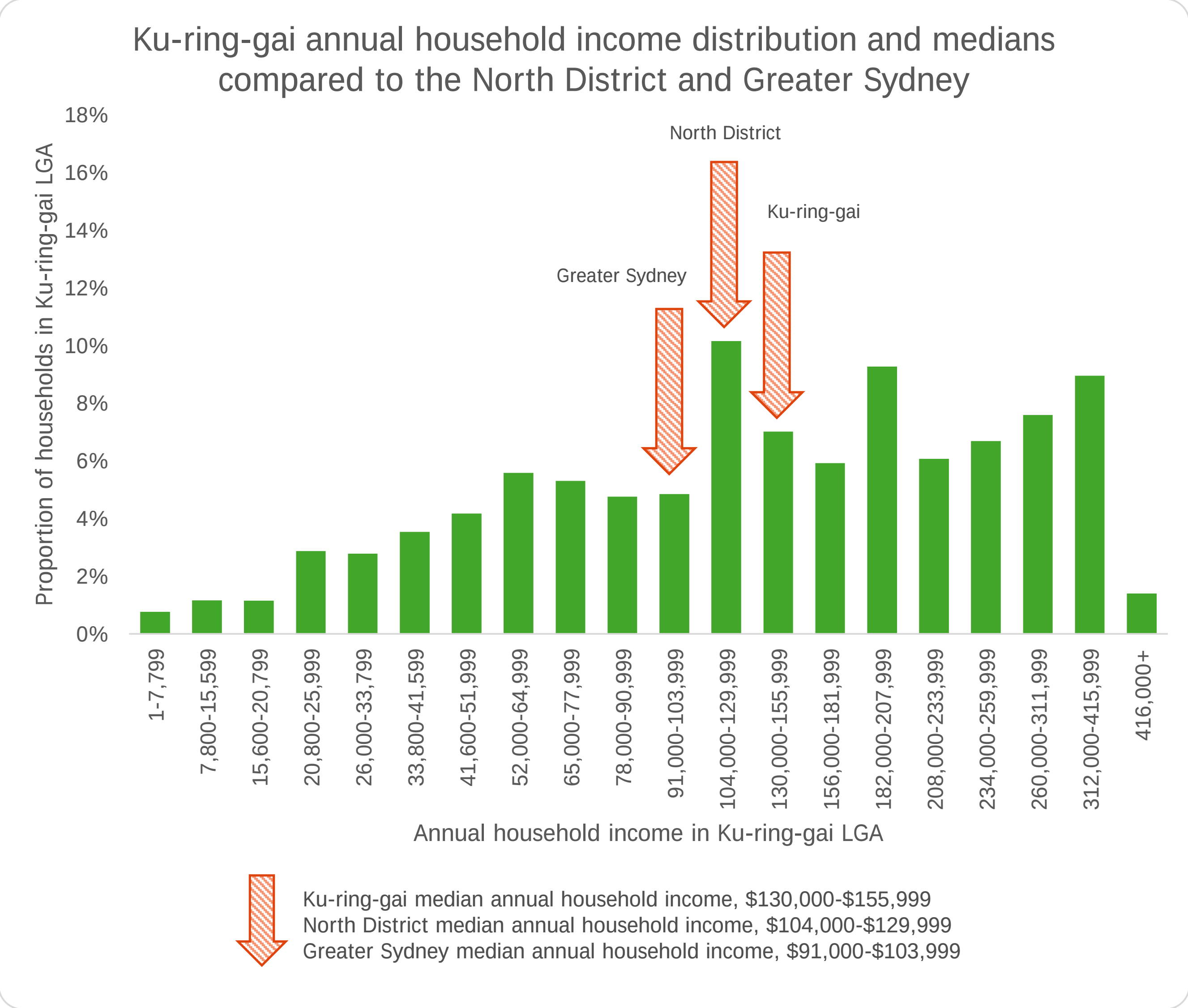
» 54% of one parent households

» 41% of group households and 57% of other family households.

Only 12% couple with children households earn less than the Greater Sydney median income.

This is calculated from **Table 10** below.

Figure 59 Ku-ring-gai annual household income distribution



Housing costs in the LGA are well above the median of Greater Sydney. Therefore, examination of both housing stress (as defined under the Ministerial Guideline on Affordable Housing) and housing affordability as defined by the Australian Bureau of Statistics (no more than 30% of income is used for housing cost for either mortgage or rental) is explored in this section.

The later can also be mapped to provide spatial analysis of where housing affordability issues are occurring. The overall picture of housing affordability in the LGA is provided below.

Table 10 Households with annual in the Ku-ring-gai LGA 2016 below the Greater Sydney media

Household income	Household composition						
	Couple Only	Couple with children	One parent	Other family	Lone person	Group household	Total
Total number of households	*8,658*	*15,377*	*2,667*	*332*	*5,909*	*458*	*33,401*
Negative income	15	20	3	3	27	0	68
Nil income	109	85	142	18	223	11	588
$1-7,799	63	32	46	15	103	0	259
$7,800-$15,599	50	26	71	12	215	8	382
$15,600-$20,799	21	25	35	0	303	4	388
$20,800-$25,999	177	53	56	9	643	9	947
$26,000-$33,799	131	86	115	15	561	15	923
$33,800-$41,599	432	124	125	9	459	20	1,169
$41,600-$51,999	409	194	175	27	539	25	1,369
$52,000-$64,999	668	329	249	30	544	33	1,853
$65,000-$77,999	666	392	228	31	408	29	1,754
$78,000-$90,999	440	435	197	21	431	36	1,560
% below Greater Sydney Median Household income	37%	12%	54%	57%	75%	41%	34%

Source: ABS - TableBuilder Basic, 2016, variables HIND, HHCD 'Ku-ring-gai (A)' (Accessed April 2019)
Note: The data display excludes 'multiple family households', 'visitors' only households' and 'other non-classifiable households'. The number of 'not stated' and 'not applicable' counts has been excluded from this data display. *Other family* is defined as a group of related individuals residing in the same household who cannot be categorised as belonging to a couple or one parent family. *Other family* includes multiple family households. The 2016 Greater Sydney median annual household income of $91,000 is referenced, as calculated by the ABS.

4.2 Rent and mortgage data

Summary and key implications for the Housing Needs Study

- Owned outright in the LGA is the dominant tenure form. This may skew data on household stress as those in financial stress may not be fully captured. With escalating property prices, this may also indicate an escalation of housing stress over the next 20 years as older cohorts are not able to pay out mortgages.
- Approximately 23% of apartments 4 storey and above are owned-outright, which may indicate people are downsizing to this type of dwelling. These are similar to the levels of couple and lone person households indicated in this type of dwelling.
- Separate dwellings and apartments 4 storey and above form the bulk of the rental supply in the LGA but also forms an important dwelling option for purchase (mortgages)

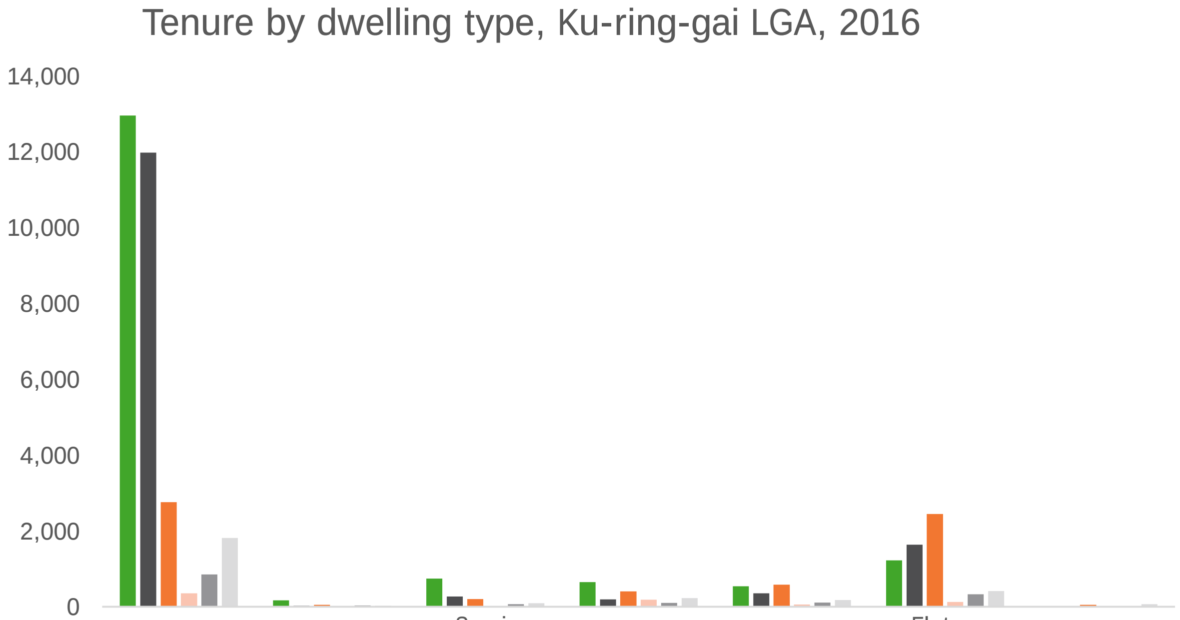
Tenure

The most common dwelling and tenure type is a single dwelling owned-outright in the Ku-ring-gai LGA. This is a high indicator of longer-term, ageing residents. Approximately 50% of separate dwellings are owned outright and is the dominant tenure type amongst all dwellings, with the exception of apartments 4-storey and above. However, even the apartment typology has 23% owned-outright which would indicate it is among other factors, an important source of downsizing in the LGA.

Approximately 9% of separate dwellings in the LGA are rented and this has remained relatively constant between 2006 – 2016.

Rental - as opposed to owned-outright and mortgage - is generally evenly split in other dwelling types (other than owned outright), but becomes the most dominant tenure type in 4-storey or above apartment buildings and indicates that larger scale typologies provides a critical source of rental accommodation in the LGA. Apartments and separate houses form the bulk of rental supply (approximately 5,200 dwellings) across the LGA. **See Figure 61**.

Figure 60 Tenure by dwelling type

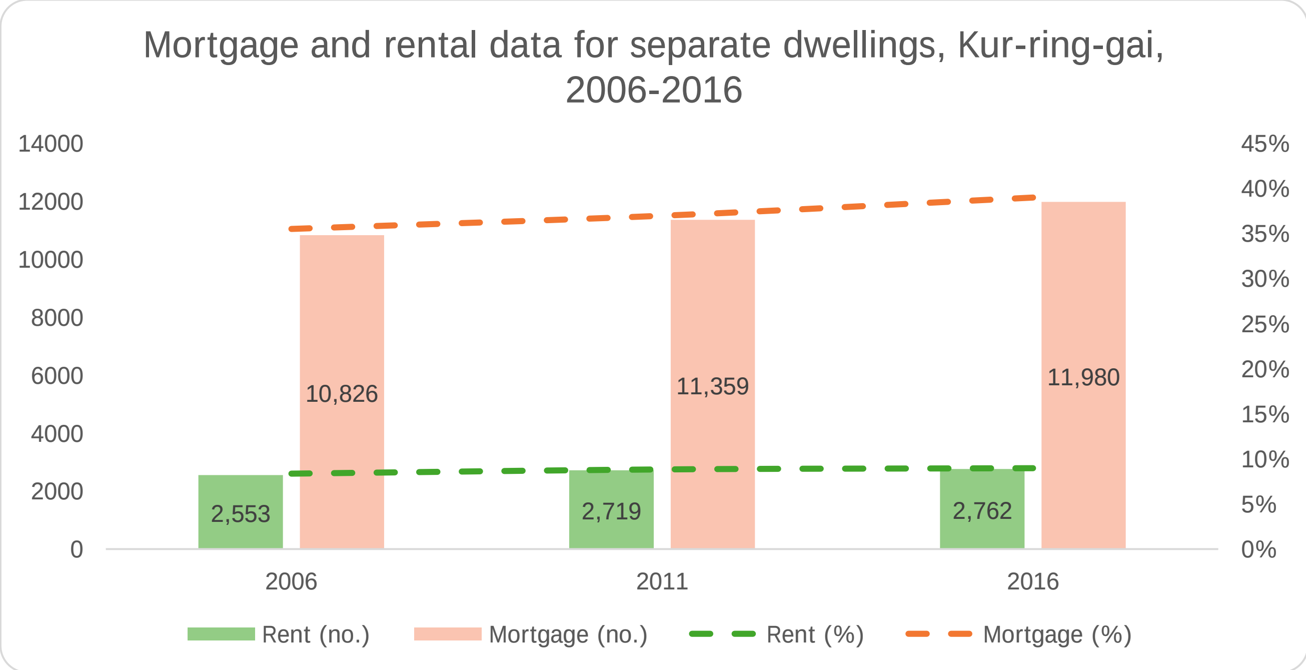


	Separate house	Semi-detached (1 storey)	Semi-detached (2 or more storey)	Flat or apartment (1-2 storey)	Flat or apartment (3 storey)	Flat or apartment (4 or more storey)	Other
Owned outright	12,954	175	741	655	546	1,223	19
Mortgage	11,980	29	271	201	360	1,643	17
Rent	2,762	54	207	408	583	2,446	51
Other	359	23	15	189	65	131	10
Not stated	856	38	70	108	115	333	18
Not applicable	1,814	32	96	233	183	420	70

Source: ABS –TableBuilder Pro, 2016, STRD, TEND, 'Ku-ring-gai (A)' (accessed December 2019)

The data indicates that apartments 4-storey and above dwelling type is an important source of rental accommodation (25% of the dwelling type) and is an important source of accommodation for purchase with mortgage (40%). See **Figures 62** and **63**. Further investigation of younger adults that are choosing this type of dwelling for purchase in is investigated in **Section 6**.

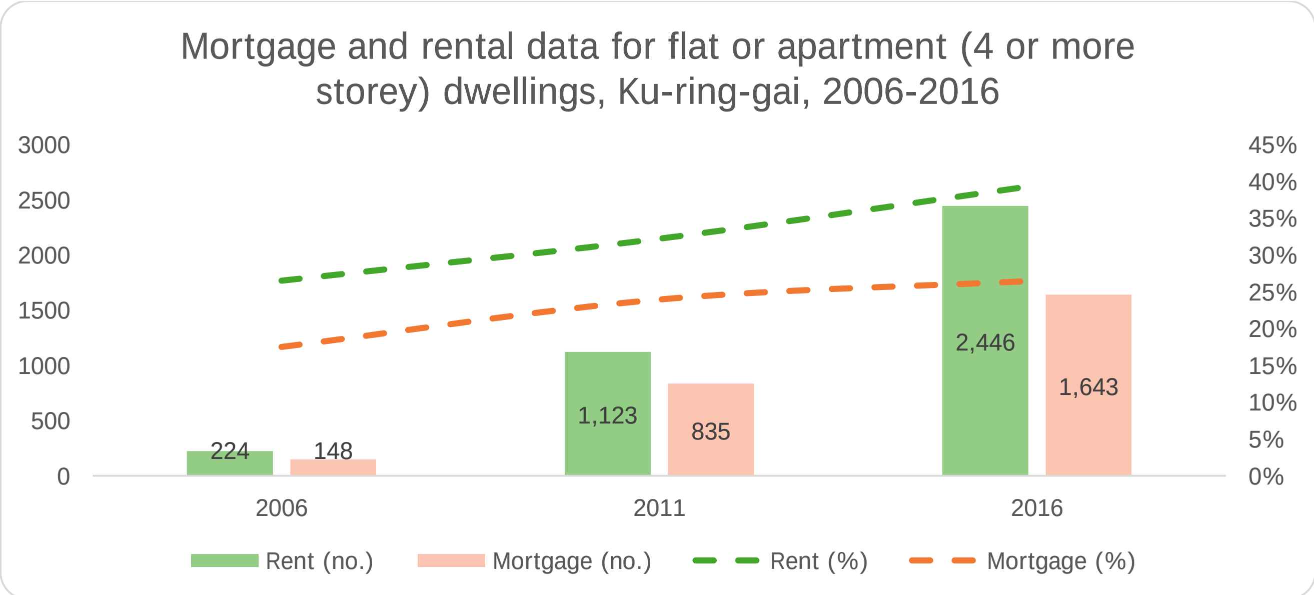
Figure 61 Mortgage and rental data for separate dwellings



Source: ABS – TableBuilder Pro, 2006, 2011, 2016, variables STRD, TEND, 'Ku-ring-gai (A)' (Accessed December 2019)

Note: mortgage and rent percentage is a proportion of the dwelling type, i.e. number of separate dwellings rented/total number of separate dwellings.

Figure 62 Mortgage and rental data for flat or apartments (4 or more storey) dwellings



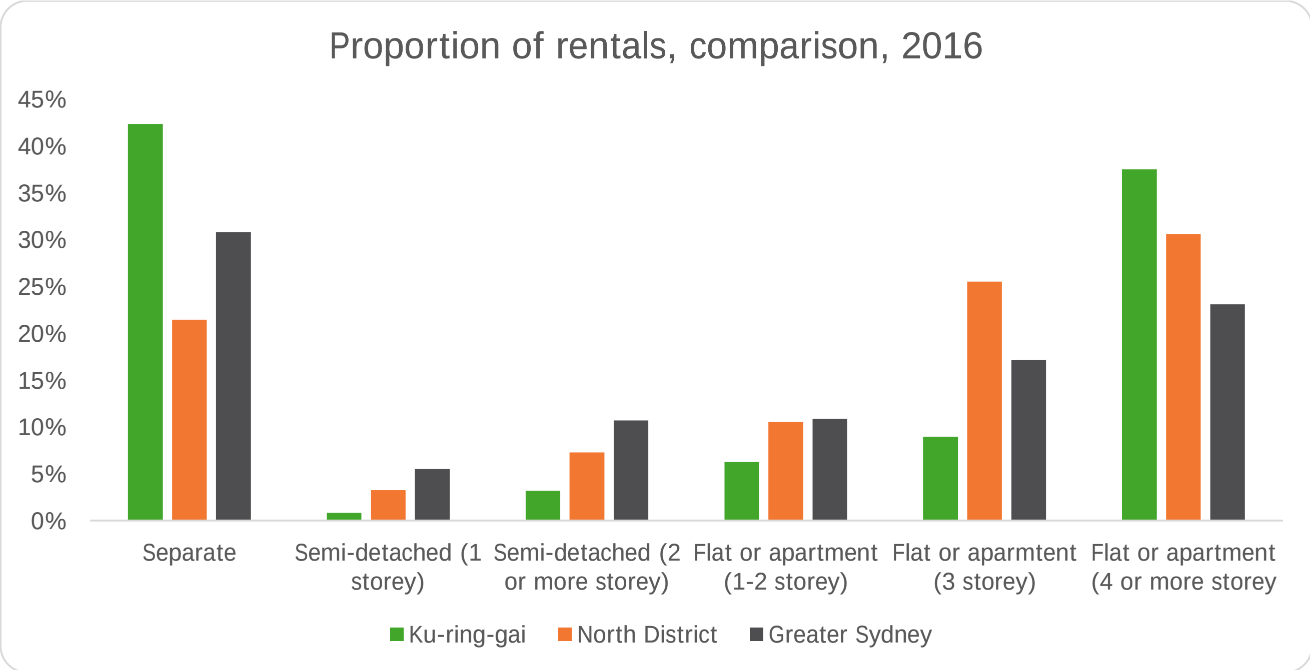
Source: ABS – TableBuilder Pro, 2006, 2011, 2016, variables STRD, TEND, 'Ku-ring-gai (A)' (Accessed December 2019)

Note: mortgage and rent percentage is a proportion of the dwelling type, i.e. number of flat or apartment (4 or more storey) dwellings rented/total number of flat or apartment (4 or more storey) dwellings.

A comparison with the North District and Greater Sydney shows that single dwellings and apartments (over 4 storeys) play a much greater role in proportion of rentals than other typologies in Ku-ring-gai. See **Figure 64.**

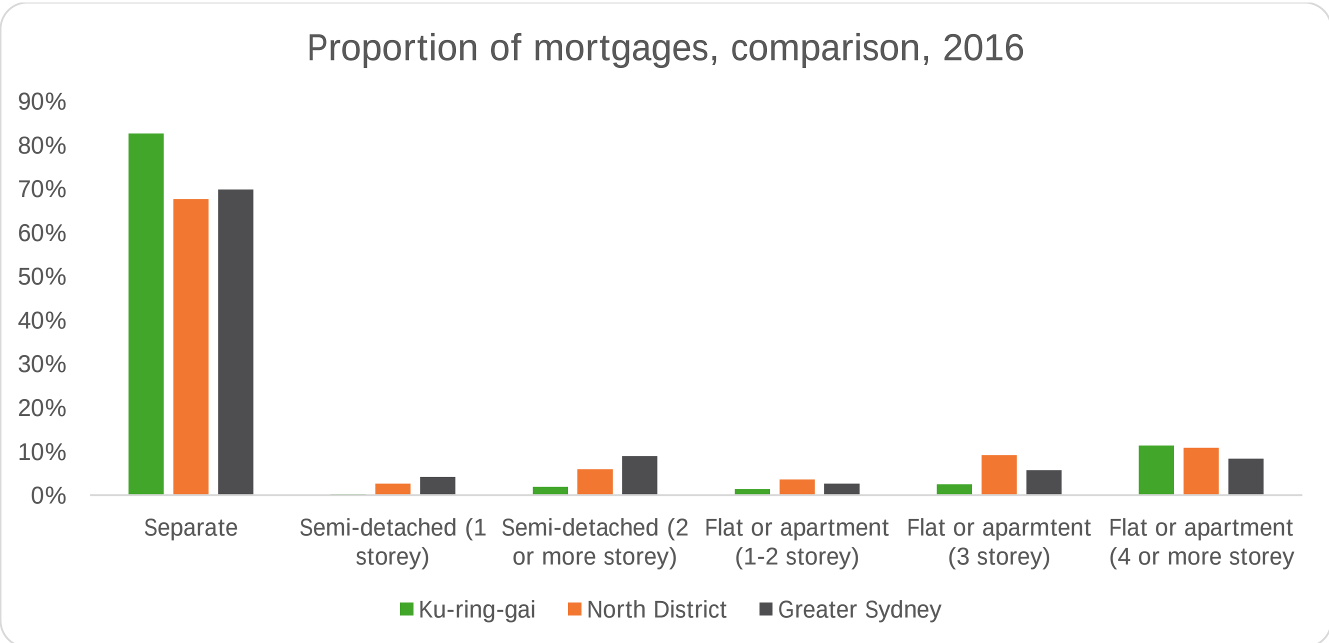
Figure 65 also indicates that apartments are important in providing purchase opportunities. While Ku-ring-gai also has a greater percentage of mortgages associated with separate dwellings than the North District and Greater Sydney, it also has a higher rate of mortgages associated with apartments 4-storey and above as well.

Figure 63 Proportion of rentals by dwelling types



Source: ABS –TableBuilder Pro, 2016, variables STRD, TEND, 'Ku-ring-gai (A)', 'North District', 'Greater Sydney' (accessed December 2019)
Note: 'North District' is the combination of the LGAs within the District

Figure 64 Proportion of mortgages by dwelling type



Source: ABS –TableBuilder Pro, 2016, variables STRD, TEND, 'Ku-ring-gai (A)', 'North District', 'Greater Sydney' (accessed December 2019)
Note: 'North District' is the combination of the LGAs within the District

4.3 Cost of housing and housing stress

Summary and implications for the Housing Needs Study

» Ku-ring-gai continues to have the highest median sales price in the North District, performing above all other LGAs. This includes strata-titled dwellings.

» However, rents have stabilised in Ku-ring-gai, likely as a result of increasing levels of stock availability. Rents only increased by 6% compared to between 15 – 23% for other surrounding LGAs.

» Rents are lower for some types of strata properties in Ku-ring-gai compared to surrounding LGAs.

» It is, therefore, important that supply is maintained to ensure stability of rents in the market, particularly for certain cohorts such as young adults and people experiencing housing stress.

» The level of unoccupied dwellings is considerably lower than other comparative LGAs, NSW and across Australia, considering a comfortable rental vacancy rate of 3-4%.

» Housing stress has risen by 73%, as defined the NSW Ministerial Guidelines on Affordable Housing. Despite relative stability in rents, rental stress has nearly doubled in the same timeframe.

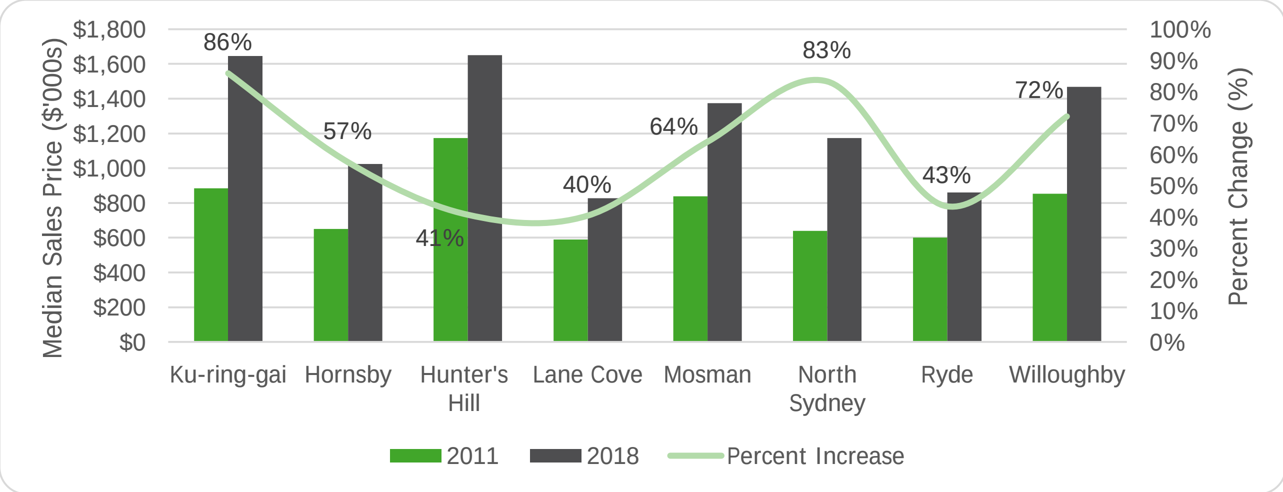
» Further analysis of the prevalence of housing stress is provided in various sections when determining the likely housing need of various population cohorts including the ageing population, families with children and culturally and linguistically diverse groups.

Median sales analysis

Ku-ring-gai has experienced one of the largest increases in housing prices in the North District between 2011 and 2018, rising by 86%. See **Figure 66**. There is a relatively high cost of strata compared to other LGA's neighbouring Ku-ring-gai. See **Table 11.**

This is likely to be a result of a combination of relatively higher land prices and also demand for purchase.

Figure 65 Sale price comparison of surrounding suburbs



Source: Department of Family and Community Services - The Rent and Sales Report Interactive Dashboard and Past Reports

Note: Northern Beaches LGA is not included in the above data due to amalgamations of Pittwater, Warringah and Manly LGAs. A comparison is provided below between Ku-ring-gai and Northern Beaches.

Table 11 Dwelling types median sale price

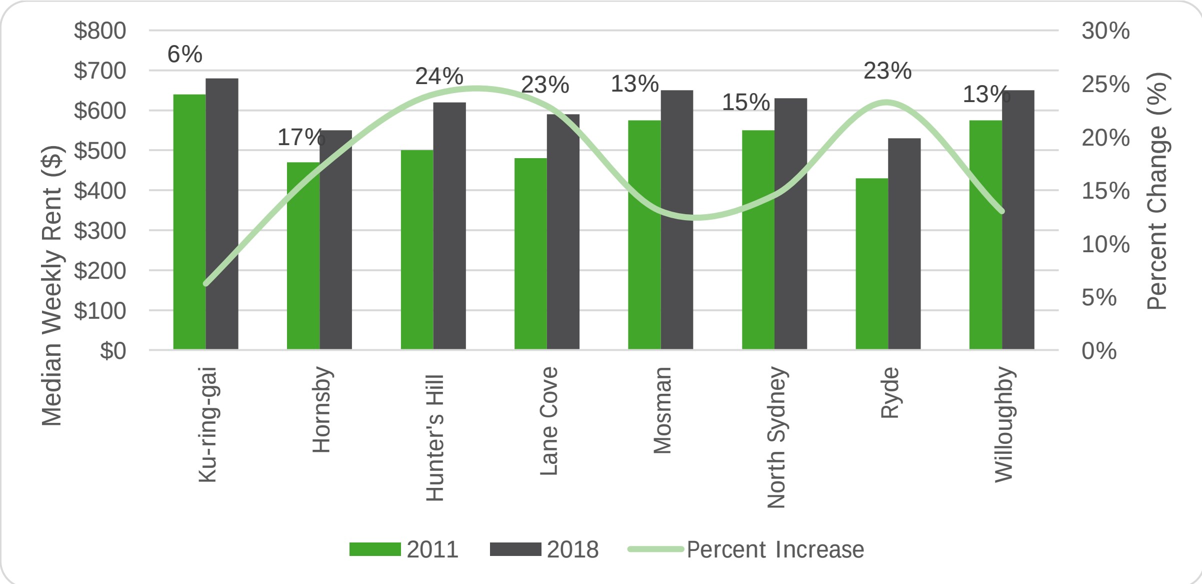
Dwelling Type (June 2019)			
Median Sales Price ($)	**Non Strata**	**Strata**	**All Types**
Ku-ring-gai	$2,289,000	$1,075,000	$1,770,000
Northern Beaches	$1,722,000	$908,000	$1,323,000
Hornsby	$1,221,000	$648,000	$1,011,000
Willoughby	$2,105,000	$883,000	$1,350,000

Source: Department of Family and Community Services - The Rent and Sales Report Interactive Dashboard and Past Reports

Median rental price analysis

Rents over this same period showed low growth with the median only rising from $640 to approximately $680 (all dwelling types). See **Figure 67.**

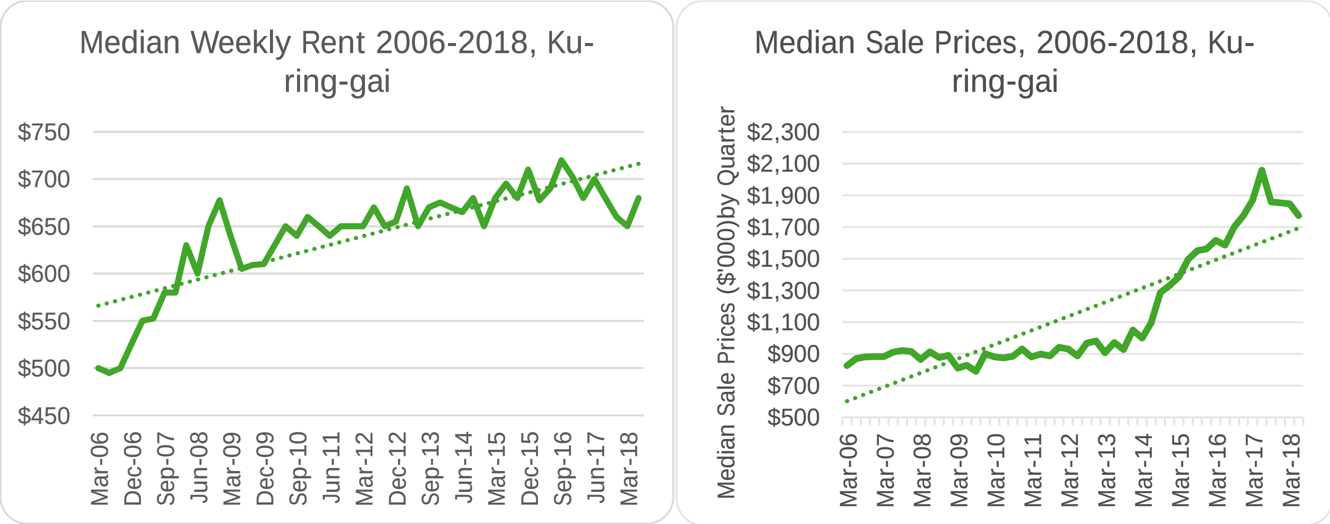
Figure 66 Rental comparison of surrounding LGAs



Source: Department of Family and Community Services - The Rent and Sales Report Interactive Dashboard and Past Reports

Note: Northern Beaches LGA is not included in the above data due to amalgamations of Pittwater, Warringah and Manly LGAs. A comparison is provided below between Ku-ring-gai and Northern Beaches.

Figure 67 Median rent 2006 – 2018 and median sale prices 2006 - 2018



Source: Department of Family and Community Services – The Rent and Sales Report Interactive Dashboard and Past Reports

Compared to other LGAs in the North District, rents in Ku-ring-gai have not increased as much. Despite the very high prices for strata dwelling in Ku-ring-gai, rents for apartments are relatively lower, with the exception of Hornsby. The higher townhouse rents are likely a factor of the very low supply in Ku-ring-gai (less than 4% of lower dwelling stock). See **Table 12.**

The increased supply of apartments since 2007 may has had a greater stabilising effect on rents in Ku-ring-gai compared to other LGAs. There has been a corresponding rise in young adults in the LGA between 2006 – 2016 (approximately a 40% increase). This is further discussed in **Section 6**.

Table 12 Ku-ring-gai – Median weekly rent per dwelling type (June 2019 quarter)

Median weekly rent per dwelling type (June 2019 quarter)				
Median Weekly Rent ($) **Dwelling Type**				
	Flat/Unit	**House**	**Townhouse**	**All Types**
Ku-ring-gai	$580	$1,000	$830	$680
Northern Beaches	$595	$950	$818	$660
Willoughby	$595	$900	$680	$625
Hornsby	$465	$660	$580	$520

Source: Department of Family and Community Services - The Rent and Sales Report Interactive Dashboard and Past Reports

4.4 Unoccupied dwellings and vacancy rate

The 2016, unoccupied dwelling rate in Ku-ring-gai was 6.8%. In comparison, North Sydney was 11.2%, Northern Beaches was 9.4%, Lane Cove 9.1%, Willoughby was 8.2% and Hornsby was 5.89%. The average unoccupied rate for NSW was 9.9% and across Australia 11.2%. Therefore, the unoccupied rate for Ku-ring-gai was substantially lower than the NSW and Australian average and lower than many other areas in the North District.

Ku-ring-gai has experienced increasing unoccupied housing rates across all its suburbs. However, this is comparable to the increase in the number the number of dwellings produced (2,718 in 2011 to 2,789 in 2016).

In 2016, 1,814 of these unoccupied properties were separate houses and 839 of these properties were flats or apartments.

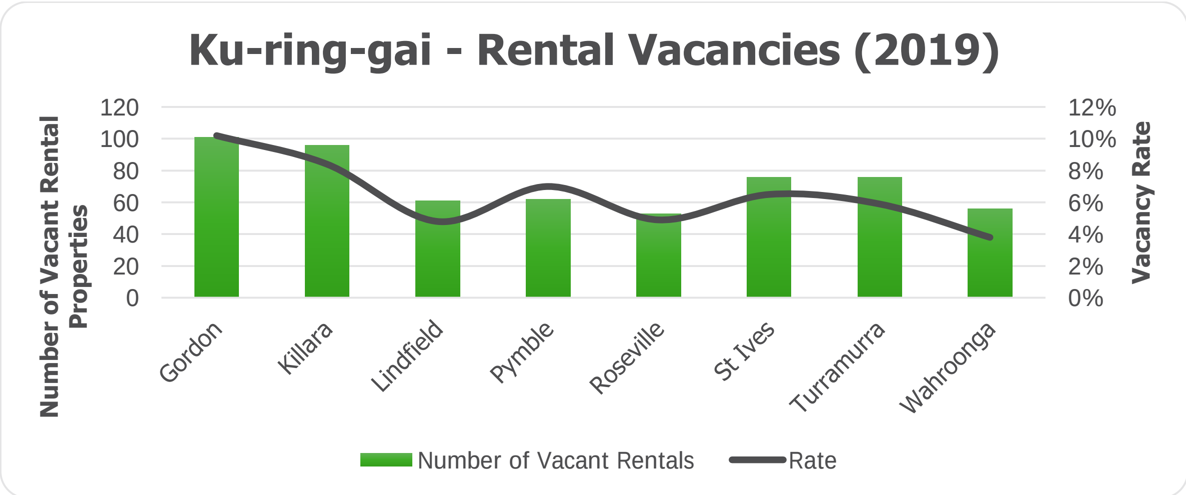
In 2016, the rental vacancy rate was between 3 and 5.4% across all Ku-ring-gai suburbs. A comfortable vacancy rate for ensuring adequate rental property supply is generally 3 – 4%. Taking an average of 4% (most suburbs in Ku-ring-gai as at 2016), the estimated number of properties that were rental vacancies was approximately 360. This is calculated by 4% of the approximate 9,000 dwellings that were available for rent.

Approximately 2,400 other dwellings were unoccupied for other reasons e.g. vacant, holiday homes, newly completed dwellings not yet occupied or due for demolition. The total number of dwellings in the LGA was 42,464 as at the 2016 Census, therefore the estimated percentage of dwelling unoccupied other than rental vacancies is estimated to be about 5.7% of dwelling stock. This unoccupied rate is approximately what would be expected.

In 2019, the vacancy rates have grown considerably in line with the rest of Greater Sydney. The greatest rental vacancy rate and number of vacancies is seen in Gordon (10%, 101 vacancies) and Killara (8%, 96 vacancies), with Roseville (5%, 53 vacancies) and Lindfield (5%, 61 vacancies) having the lowest. See **Figure 69**. However, the longer-term trend is for much lower vacancy rates. See **Table 13.**

Note: Unoccupied private dwellings include vacant houses, holiday homes, newly completed dwellings not yet occupied, dwellings which are vacant because they are due for demolition or repair, and dwellings to let. (*ABS Census Dictionary, 2016)*

Figure 68 Rental vacancies 2019



*Source: SQM Research – Vacancy Rates by Suburb (*March 2019)

Table 13 Vacancy rates for various suburbs in Ku-ring-gai (intervals from 2006 – 2019)

Suburb	Year	No. of vacancies	Vacancy rate	Suburb	Year	No. of vacancies	Vacancy rate
Gordon	Jan 2006	16	3%	Roseville	Jan 2006	20	4%
	Jan 2011	34	8%		Jan 2011	14	2.8%
	Jan 2016	18	3%		Jan 2016	20	3%
	Mar 2019	101	10%		Mar 2019	53	5%
Killara	Jan 2006	24	4%	St Ives	Jan 2006	37	5.5%
	Jan 2011	26	4%		Jan 2011	29	3.5%
	Jan 2016	48	5.4%		Jan 2016	36	4%
	Mar 2019	96	8%		Mar 2019	76	6%
Lindfield	Jan 2006	19	3.5%	Turramurra	Jan 2006	25	3.8%
	Jan 2011	15	2.8%		Jan 2011	32	4%
	Jan 2016	37	4%		Jan 2016	34	4%
	Mar 2019	61	5%		Mar 2019	76	6%
Pymble	Jan 2006	30	6%	Wahroonga	Jan 2006	25	3.8%
	Jan 2011	50	7.2%		Jan 2011	32	4%
	Jan 2016	32	4%		Jan 2016	34	4%
	Mar 2019	62	7%		Mar 2019	76	6%

Source: SQM Research – Vacancy Rates by Suburb (2006 – 2019)

4.5 **Prevalence of housing stress**

Summary and key implications for the Housing Needs Analysis

- There has been an escalation of housing stress as defined by the NSW Affordable Housing Ministerial Guideline (73% increase between 2006 and 2016). The definition of this is provided in **Section 4.5.1**.
- Rental stress has nearly doubled over the same time frame
- In addition, housing stress defined by NSW Ministerial Guidelines for Affordable Housing, housing affordability issues are becoming more prevalent in some sectors of the community. This includes cohorts that may not be able to "recover" such as the over 55s cohort
- Further examination of affordability concerns is assessed in housing needs for the ageing population, young adults, families with children, vulnerable culturally and linguistically diverse and Aboriginal and Torres Strait Islander identification and by gender. These are explored further in other sections of this report.

4.5.1 **Households eligible for Affordable Housing**

As there is a high level of outright ownership in the Ku-ring-gai LGA, housing stress indicators may not provide a fully accurate picture of financial stress i.e. because they do not have a mortgage or rent. Therefore, some people on low household incomes may not show as technically being in housing stress.

There are two key definitions of housing stress. One is indicative of very low, low and moderate income based on the Greater Sydney median household income. These households are eligible for formal affordable housing under the NSW Affordable Housing Ministerial Guidelines where households have very low, low and moderate income households defined as:

» a very low income household earns less than 50% of the relevant median household income for Sydney or rest of NSW, as applicable.

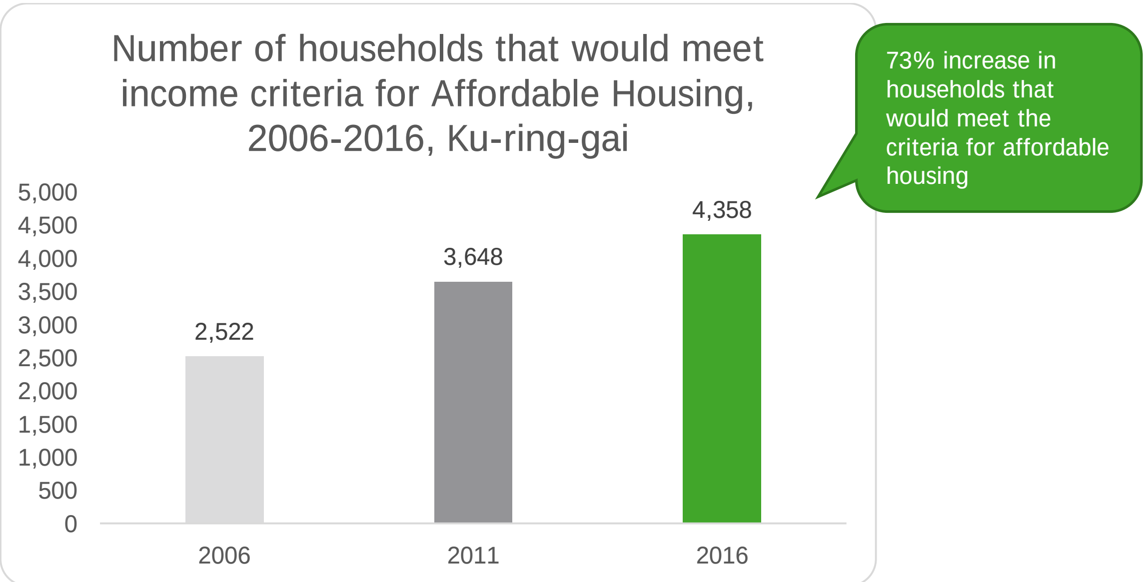
» a low income household earns between 50% and 80% of the relevant median household income for Sydney or rest of NSW, as applicable.

» a moderate income household earns between 80% and 120% of the relevant median household income for Sydney or rest of NSW, as applicable.

In Ku-ring-gai, the number of households that meet this criterion has risen by 73% between 2006 – 2016 as shown in **Figure 70**. The number of households experiencing significant rental stress has nearly doubled in the same period. See **Figure 70.**

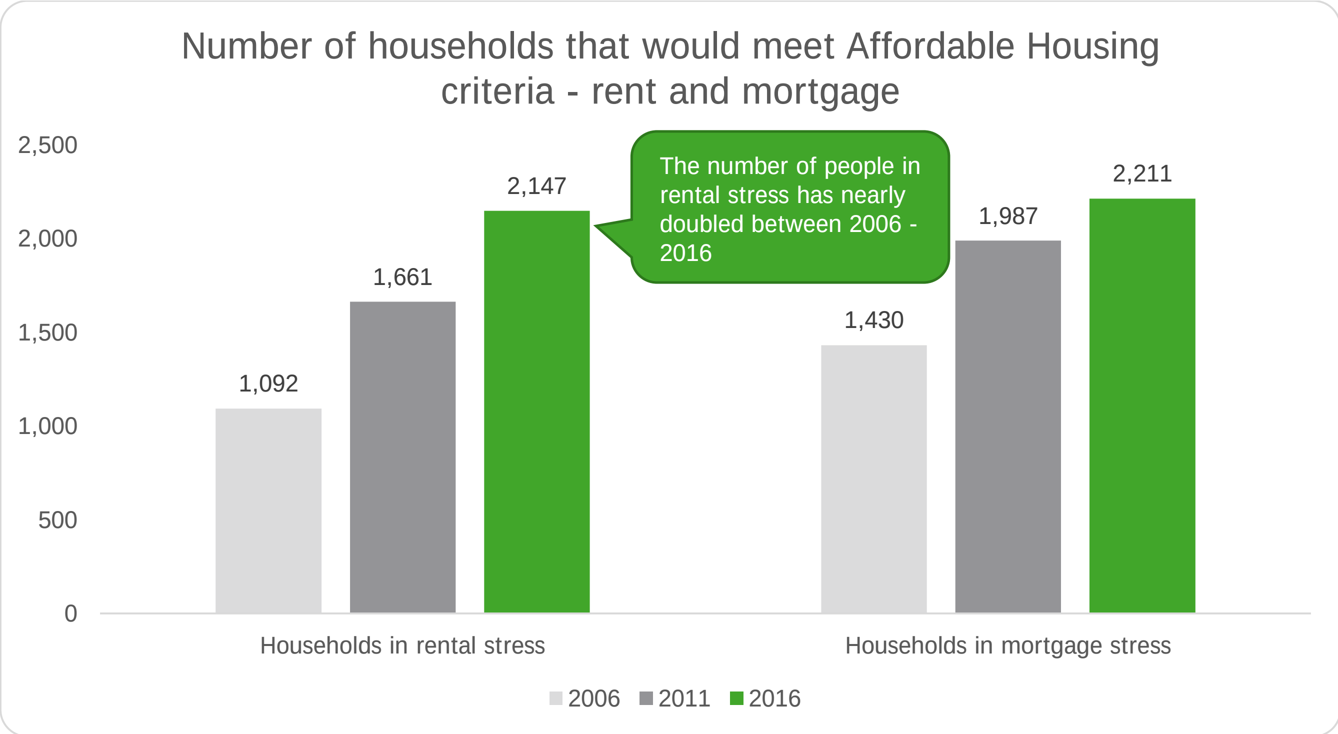
Over 10% of households in the LGA are subject to significant housing stress (as defined by the NSW Affordable Housing Ministerial Guidelines), not just affordability concerns (i.e. housing cost is over 30% of household income).

Figure 69 Number of households that would meet income criteria for Affordable housing, 2006 – 2016



Source: Family and Community Services - NSW Local Government Housing Kit Database (2006, 2011, 2016)

Figure 70 Rent and mortgage stress, 2006 – 2016



Source: Family and Community Services - NSW Local Government Housing Kit Database (2006, 2011, 2016)

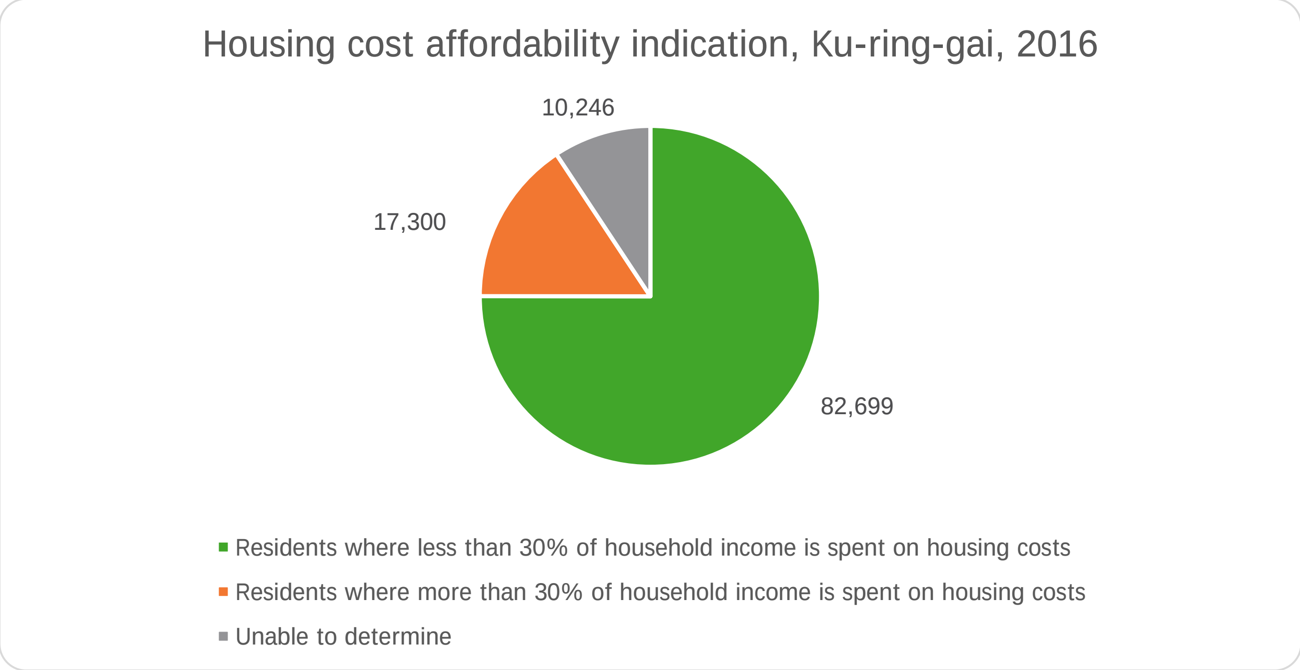
4.5.2 Housing stress/affordability indicator in Ku-ring-gai – general assessment

Another key indicator of housing unaffordability is where a household is spending more than 30% of household income on housing – not related to the Greater Sydney household income median. While the previous indicator outlines some key worker and other low income households in housing stress, this indicates the broader affordability of housing in the LGA. This data also has the advantage of being able to be mapped and therefore, gives an indication of where housing stress/affordability concerns are impacting the LGA and illuminating spatial patterns.

The following provides a summary of how broader housing affordability issues are impacting the Ku-ring-gai LGA. This data includes households previously outlined as those that are experiencing more acute housing stress.

As shown below, up to 25% of residents could be living in households where affordability of housing is likely a concern. While this may be a more temporary concern for some residents e.g. young families starting out, there are also other cohorts where there is less likely to be a recovery. For example, those over 55 experiencing housing stress are unlikely to be able to manage housing cost or recover.

Figure 71 Housing cost affordability indication



Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, housing cost, 'Ku-ring-gai (A)' (accessed December 2019)

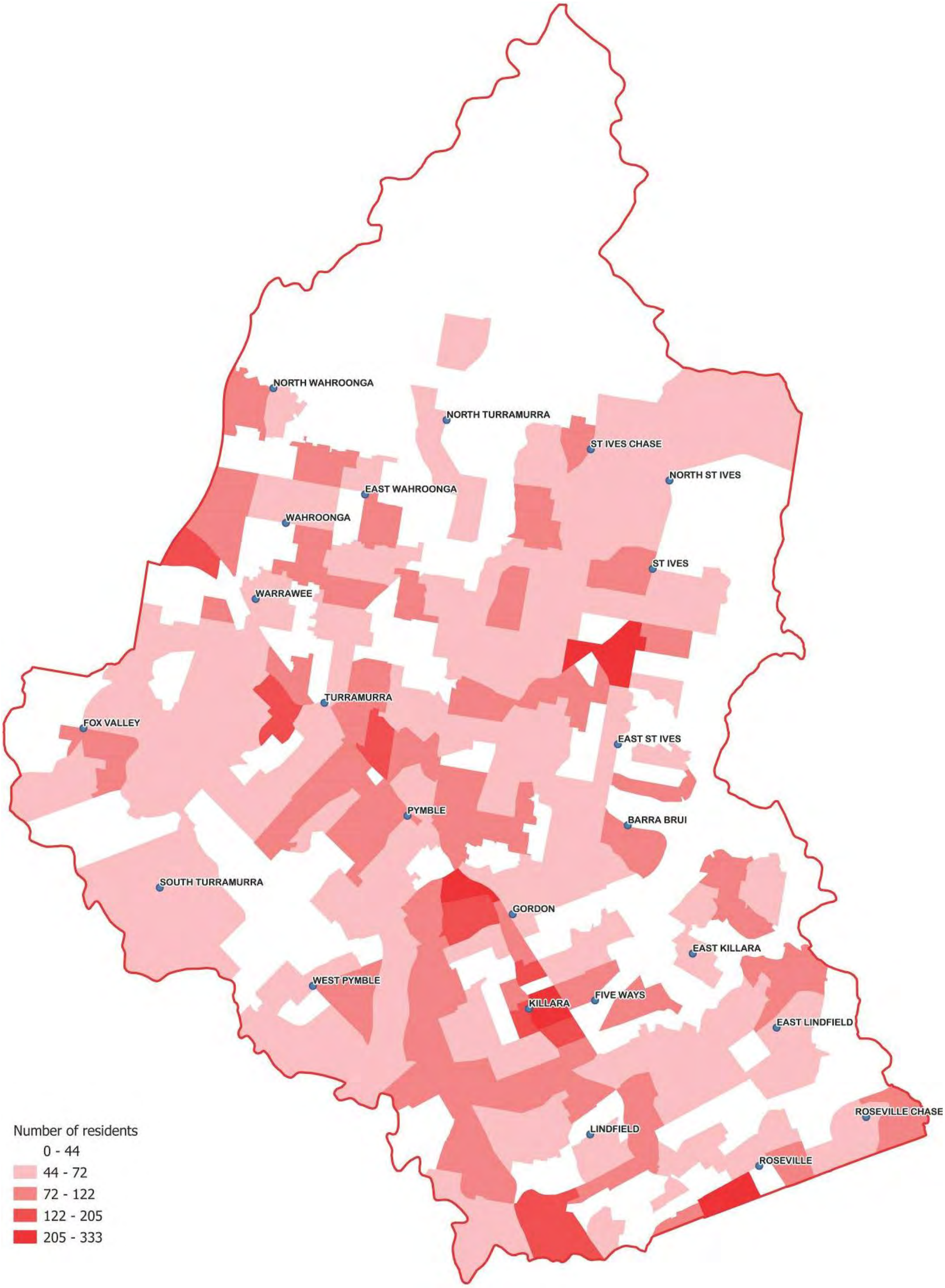
Figure 73 provides a spatial indication of the areas of households with affordability concerns. The locations that exhibit the most number of households experiencing housing affordability are generally locations with more apartments.

It can be seen that locations where newer apartment development has occurred (e.g. Roseville, Warrawee, St Ives and so forth) have the highest concentration of housing affordability issues.

However, it should also be noted that other areas dominated with separate dwelling stock also have housing affordability issues. Therefore, it is important to understand which cohorts are being most impacted as this may have implications for housing need in the future.

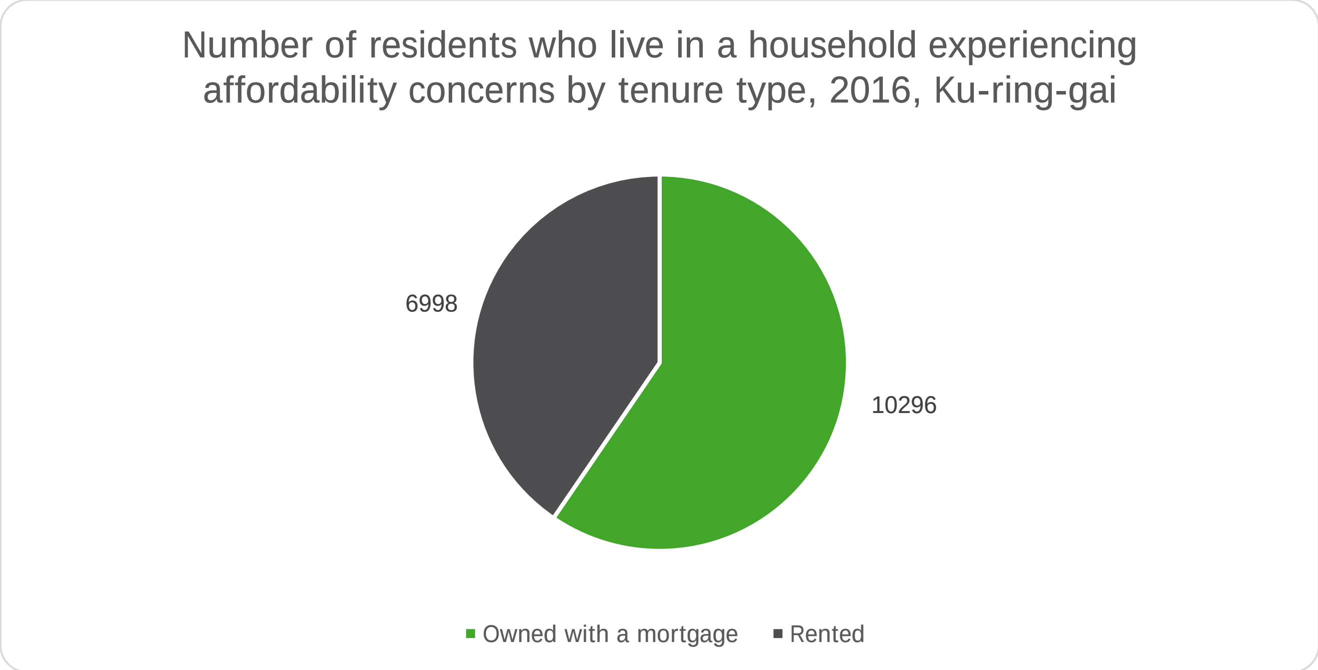
Affordability is more of a concern in rented tenure type than mortgaged properties despite the relatively low growth in rental prices outlined in **Section 4.3**. See **Figure 74.**

Figure 72 Housing affordability concerns – 30% or more of household income used on the cost of housing



There is a strong correlation between housing stress and tenure type. The maps below show housing stress according to rental and other tenure types.

Figure 73 Number of residents who live in a household experiencing unaffordability by tenure type

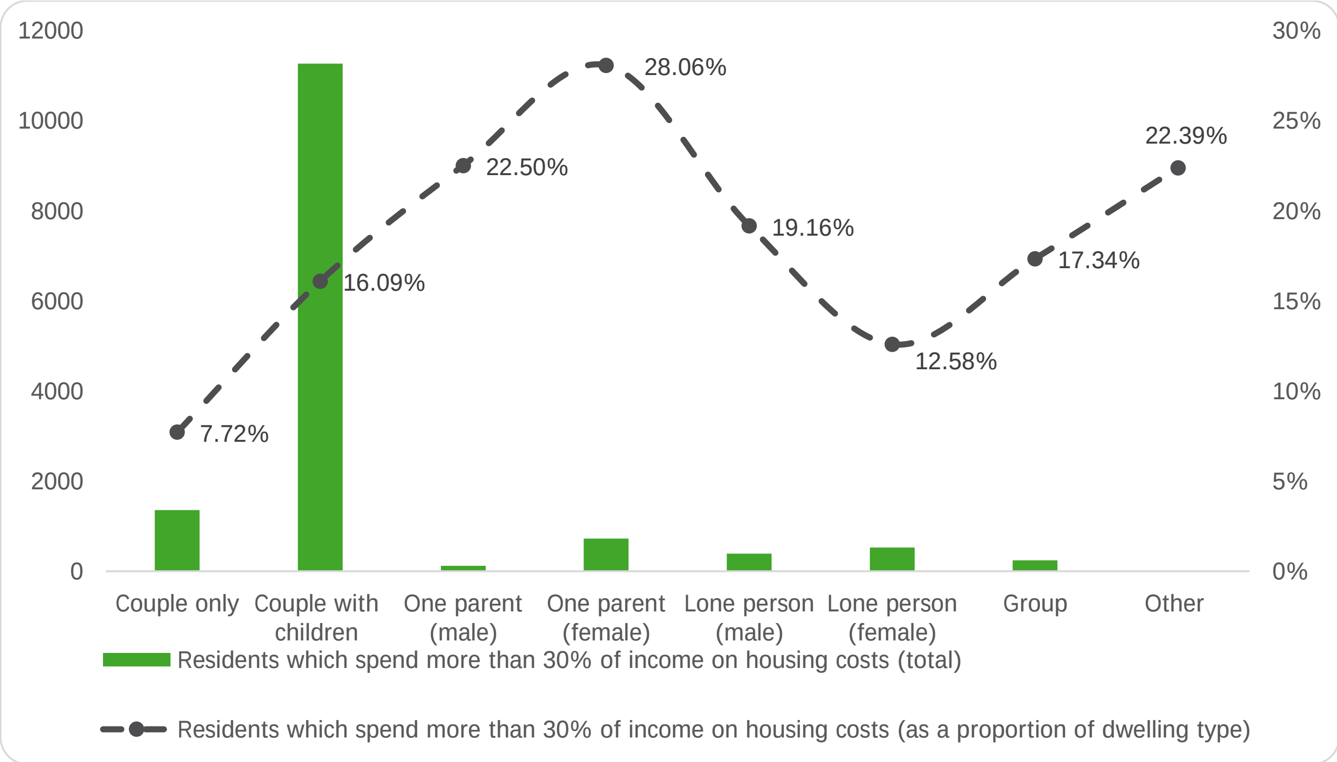


Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, housing cost, TEND, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 75 shows the percentage of types of households experiencing affordability issues. The key household type experiencing affordability concerns is female-led one parent households (28%). Female lone person households experience less housing affordability issues than their male counterparts, but male lone person households are less numerous. See **Figure 75**. However, it should be noted that for females in general housing affordability becomes more of a concern than their male counterparts the older they get. See **Figure 76**.

Approximately 6,000 couple with children household experience affordability issues, but those experiencing this only represents approximately 16% of that household type. Couple only households have the lowest rates of low affordability in general. Other types of households have relatively levels of affordability issues.

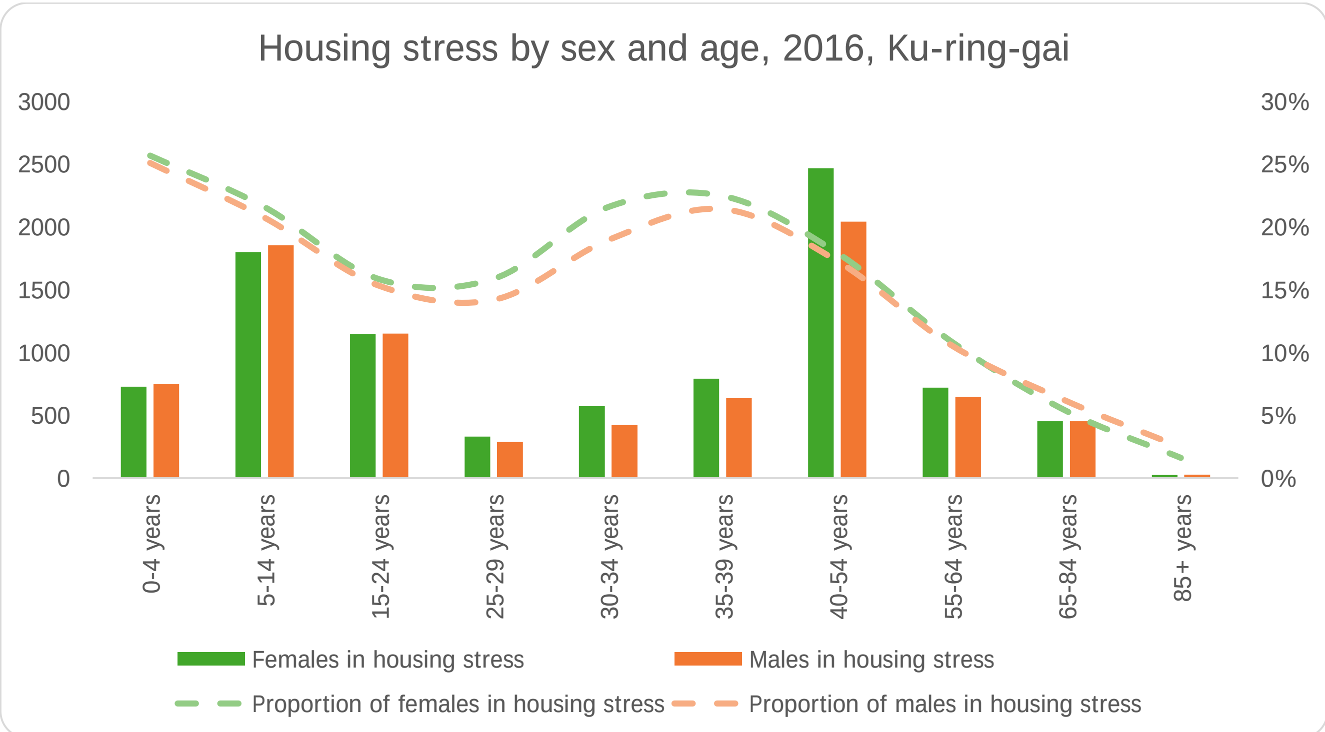
Figure 74 Housing affordability concerns by household type



Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, housing cost, family composition, sex, 'Ku-ring-gai (A)' (accessed December 2019)

The data at **Figure 76** also indicates that females experience affordability concerns more than males in the 30 – 40-year age range but this declines in older cohorts.

Figure 75 Housing stress by sex and age



Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, housing cost, age, 'Ku-ring-gai (A)' (accessed December 2019)

4.5.3 **Spatial distribution of affordability as a concern**

The spatial distribution of where affordability is a concern for residents with mortgages is widespread across the LGA. See **Figure 77**.

Rental affordability as a concern is more tightly concentrated around the train line and concentrated where apartment development has recently been undertaken. This may be as a result of dwelling prices being higher in these locations due to accessibility, but is also represented in less accessible newer housing stock around St Ives. See **Figure 78.**

It is therefore important that supply of dwellings along this corridor is maintained to stabilise rental availability to minimise escalation of rents.

Figure 76 Mortgage housing cost above 30% of household income

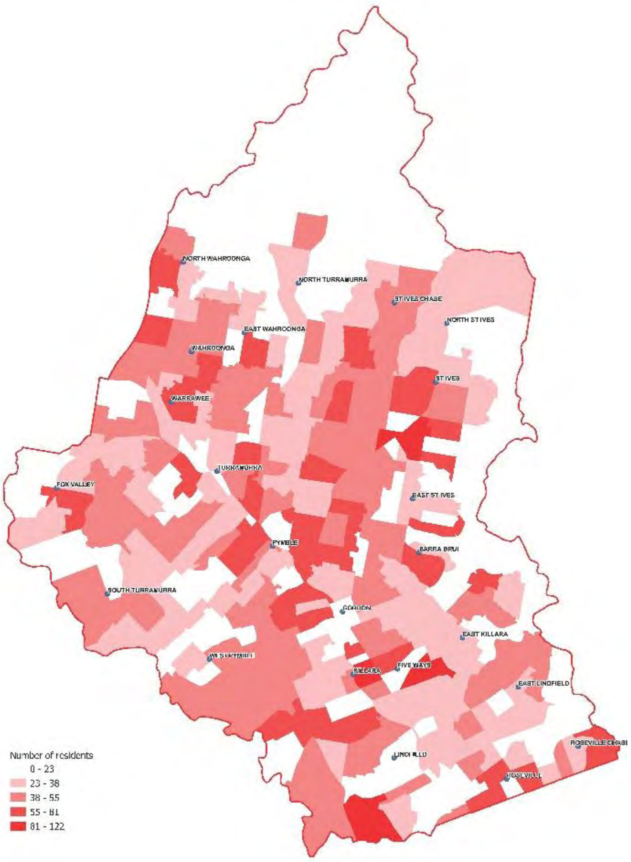
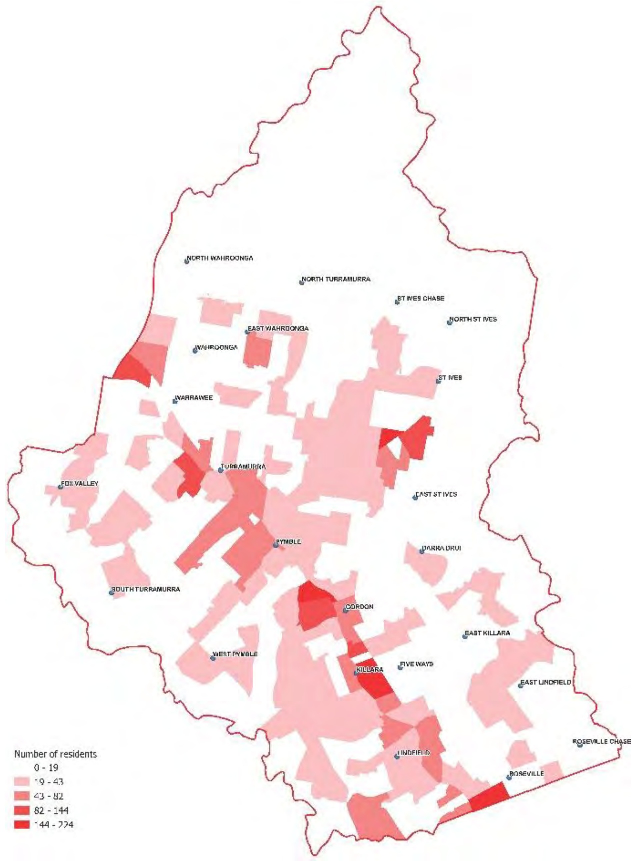


Figure 77 Rental housing cost above 30% of household income



It is imperative that there is an understanding of the level of households that are experiencing housing stress and which cohorts are being impacted most.

Based on the information below and previous data, investigating the prevalence of affordability concerns is a key requirement of the Housing Needs Study including:

» in ageing cohorts, particularly lone person households considering income data

» younger adults and whether this plays a role in outward migration

- culturally and linguistically diverse communities, considering that population growth has typically been driven by overseas migration
- young families considering the rise in this cohort choosing to live in apartments in the area.

An overall assessment of affordable housing need is provided in **Section 14** of this report.

5 Housing needs for an ageing population

The mobility rates of older Australians examined by AHURI suggest that between 30 – 45% have or would consider downsizing according to various personal circumstances[15] and the right stock being available.

To be conservative, a low estimation of increased rates of downsizing suggest that 37% of older cohorts may downsize in Ku-ring-gai. This roughly equates to the number of 85+ people that currently reside in non-detached dwellings. There has been a trend in apartments 4-storey and above dwellings to attract younger downsizers in the older population group than has traditionally been the case.

5.1 Trends in the choice of private housing for an ageing population

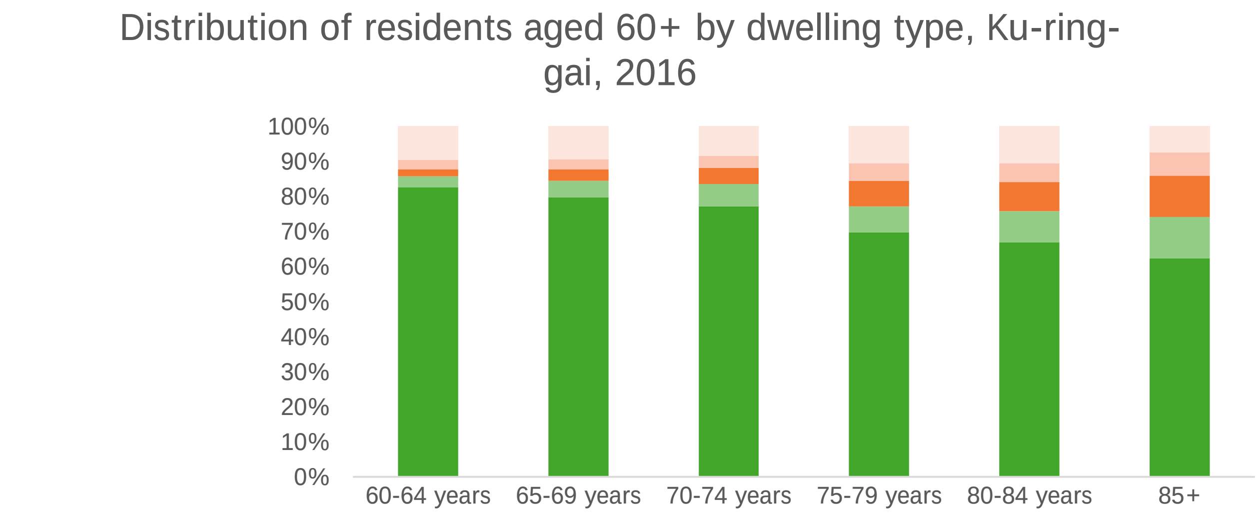
The peak of outward migration for the ageing population is typically the 50 – 59-year age range as previously outlined in **Section 3.2.** Post this age, there is decline in over 60s choosing to live in separate dwellings as illustrated in **Figure 79.** This uses the proportion of the population in each age group to account for decline in population in each age group.

The proportion of people at 60 that do not live in a separate house in Ku-ring-gai is 20% climbing to 38% by 80 – see **Figure 79**. It should also be noted that of the 60 – 64-year age cohort, 10% live in an apartment 4-storey or above as at 2016. Since most of these apartments were delivered post 2006, it is assumed most of these generally downsized during the 2006 – 2016 period.

Therefore, the assumption of 37% downsizing, should desired stock be available in the right location, seems a reasonable assumption to guide the housing needs analysis for the ageing population.

[15] AHURI "Moving, downsizing and housing equity consumption choices of older" November 2019 Australianshttps://www.ahuri.edu.au/__data/assets/pdf_file/0024/49119/AHURI-Final-Report-321-Moving-downsizing-and-housing-equity-consumption-choices-of-older-Australians.pdf and AHURI "Effective Downsizing Options for Older Australians" (February 2020) https://www.ahuri.edu.au/__data/assets/pdf_file/0033/56886/AHURI-Final-Report-325-Effective-downsizing-options-for-older-Australians.pdf

Figure 78 Distribution of residents aged 60+ by dwelling types



	60-64 years	65-69 years	70-74 years	75-79 years	80-84 years	85+
Flat or apartment (4+ storey)	9.39%	9.10%	8.01%	9.89%	9.77%	6.71%
Flat or apartment (3 storey)	2.57%	2.72%	3.24%	4.63%	4.93%	5.96%
Flat or apartment (1-2 storey)	1.95%	3.12%	4.33%	6.86%	7.57%	10.55%
Semi-detached	2.99%	4.49%	6.00%	6.83%	8.19%	10.49%
Separate house	80.10%	76.07%	72.43%	64.96%	61.35%	55.81%

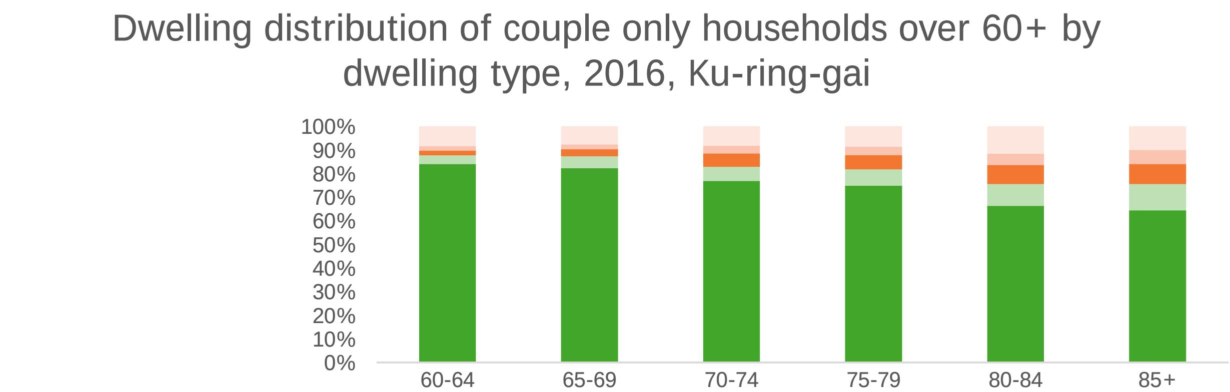
Source: ABS –TableBuilder Pro, 2016, variables AGE5P, STRD, 'Ku-ring-gai (A)' (accessed December 2019)

While lower scale apartments have traditionally attracted 75 + cohorts (see **Section 3.7**), in the 2006 – 2016 period there has been a more significant rise in the over 60 age cohorts choosing apartment living (over 4-storey), with occupancy growing seven-fold in the 2006 – 2016 period.

Trends in older couple-only and lone person households

Choosing stock other than separate houses is more prevalent in lone person households than couple only households. See **Figure 80** and **81.**

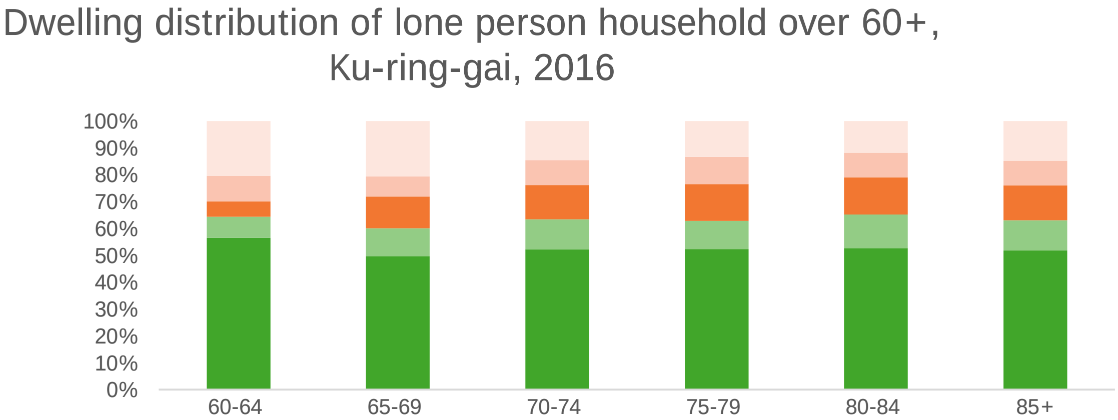
Figure 79 Dwelling distribution of couple only households over 60+ by dwelling type



	60-64	65-69	70-74	75-79	80-84	85+
Flat or apartment (4 or more storey)	8.32%	7.67%	8.26%	8.66%	11.61%	9.98%
Flat or apartment (3 storey)	1.93%	2.08%	3.20%	3.49%	4.68%	5.91%
Flat or apartment (1-2 storey)	2.0%	2.88%	5.66%	6.08%	8.15%	8.53%
Semi-detached	3.72%	5.02%	6.05%	6.94%	9.30%	11.14%
Separate house	84.01%	82.35%	76.82%	74.84%	66.26%	64.44%

Source: ABS –TableBuilder Pro, 2016, variables AGE5P, STRD, HHCD, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 80 Dwelling distribution of lone person households over 60+



	60-64	65-69	70-74	75-79	80-84	85+
Flat or apartment (4+ storey)	20.94%	20.50%	14.62%	13.22%	11.85%	14.83%
Flat or apartment (3 storey)	9.83%	7.50%	9.45%	10.10%	9.26%	9.13%
Flat or apartment (1-2 storey)	5.77%	11.67%	12.85%	13.52%	13.90%	13.04%
Semi-detached	8.12%	10.33%	11.23%	10.40%	12.67%	11.21%
Separate hosue	57.91%	49.33%	52.58%	51.86%	53.00%	51.79%

Source: ABS –TableBuilder Pro, 2016, variables AGE5P, STRD, HHCD, 'Ku-ring-gai (A)' (accessed December 2019)

There is also a significant upswing in townhouse/terrace/villa-style housing in this older age group, but as the supply is highly constrained (approximately 4% of stock), there is likely to be significant under-representation in all age groups. However, there is a distinct pattern of people residing in this type of stock as they get older. See **Figures 82** and **83.**

There is a strong trend toward apartment living, including apartments 4 storey and above, particularly at the younger end of the over 55 age cohort. There has been a 600% growth in the over 55 age cohorts living in apartments 4-storey and above between 2006 and 2016. See **Figure 82**.

Figure 81 Change in proportion of people over 55 apartments (4 storey and above) 2006 - 2016

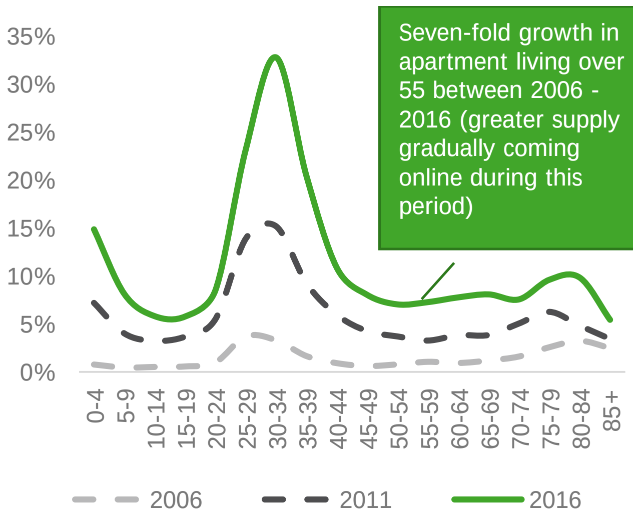
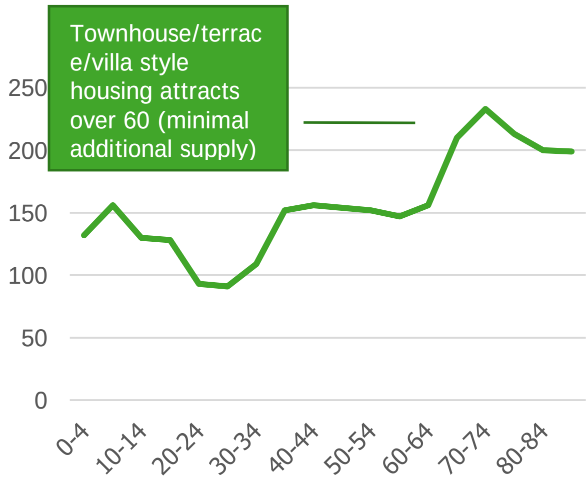
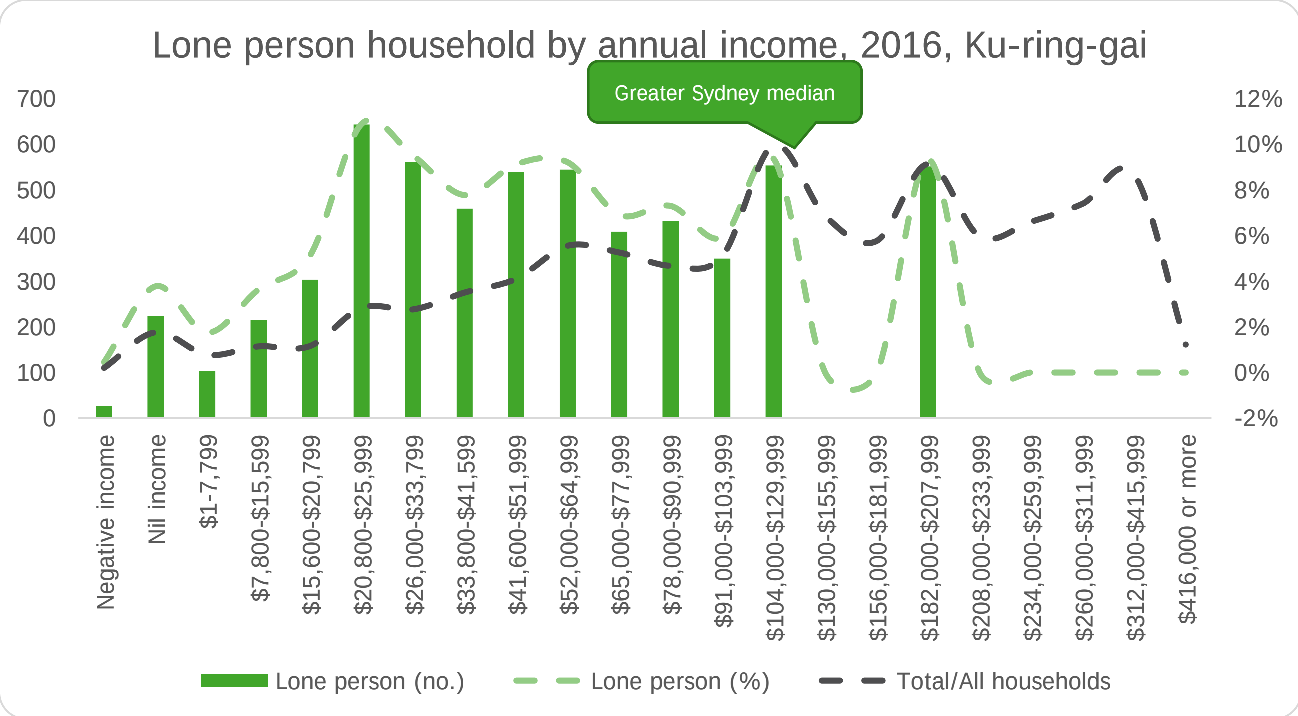


Figure 82 Residents over 60 choosing semi-detached, row, terrace houses – 2016



It is also shown in **Figure 84**, that incomes are in the most part lower than the Greater Sydney median for lone-person households and this may be an incentive to downsize. Lower household incomes are less prominent in couple-only households, and therefore the right kind of stock to downsize to is likely plays more of role.

Figure 83 Lone person household by annual income, 2016



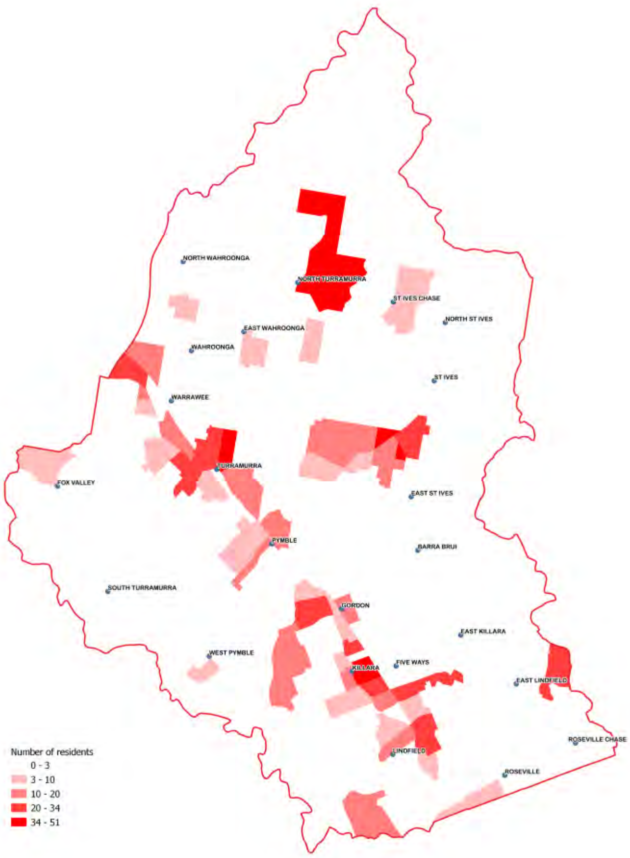
Source: ABS - TableBuilder Basic, 2016, variables HIND, HHCD 'Ku-ring-gai (A)' (Accessed April 2019)

5.1.1 Where are over older residents in apartments and townhouses locating

Mapping of change of address data for over 55 residents moving internally within the LGA between 2011 and 2016 is provided at **Figures 85 and 86** below.

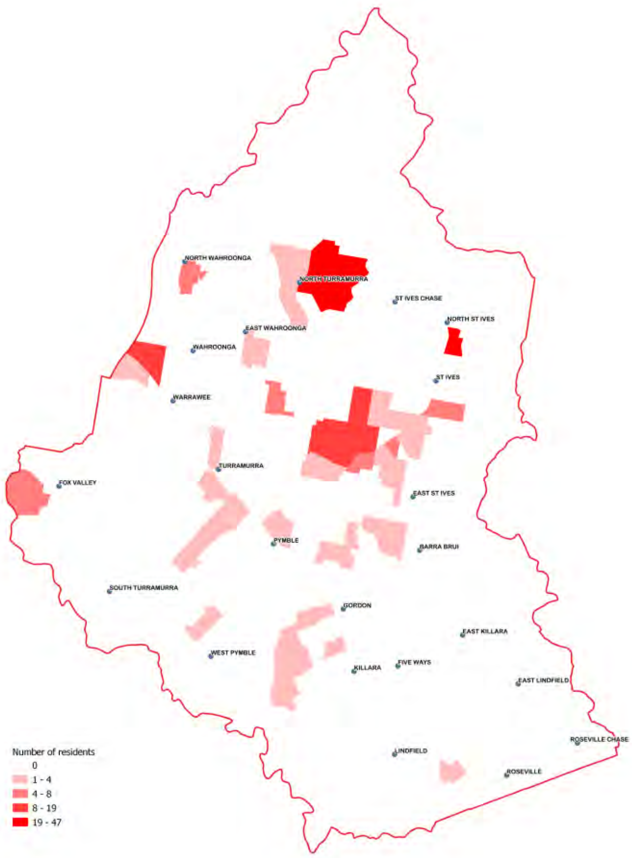
While there has been movement towards North Turramurra, there has been a strong attraction to locations on the rail corridor and St Ives for apartment-style living. For semi-detached townhouse stock, this has been driven by stock availability and is more disbursed. Should more of this under-represented stock be available, particularly in more accessible locations, it would be expected that more significant movement in older cohorts may occur.

Figure 84 Internal migration over 55s 2011 – 2016 to apartments



Source: ABS, 2011

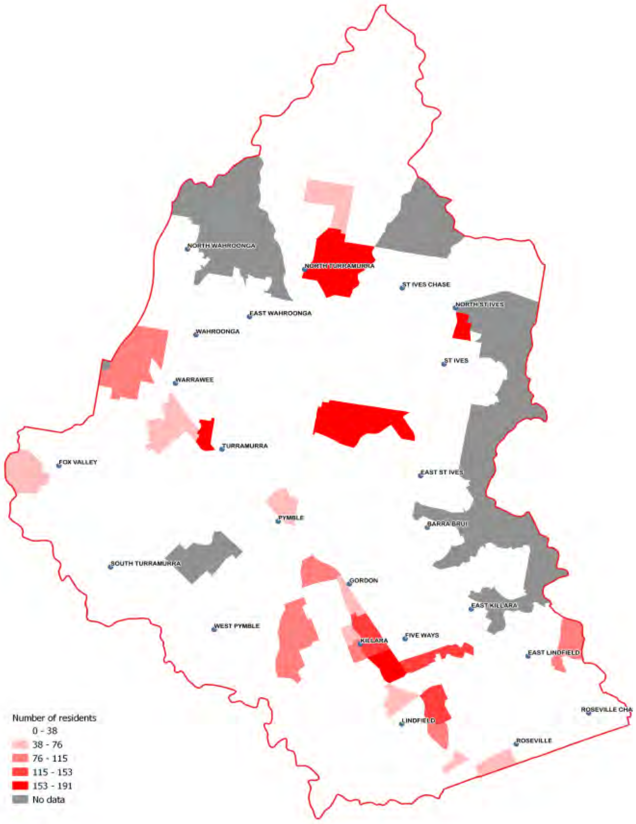
Figure 85 Internal migration over 55s 2011 – 2016 to townhouses



Source: ABS 2016

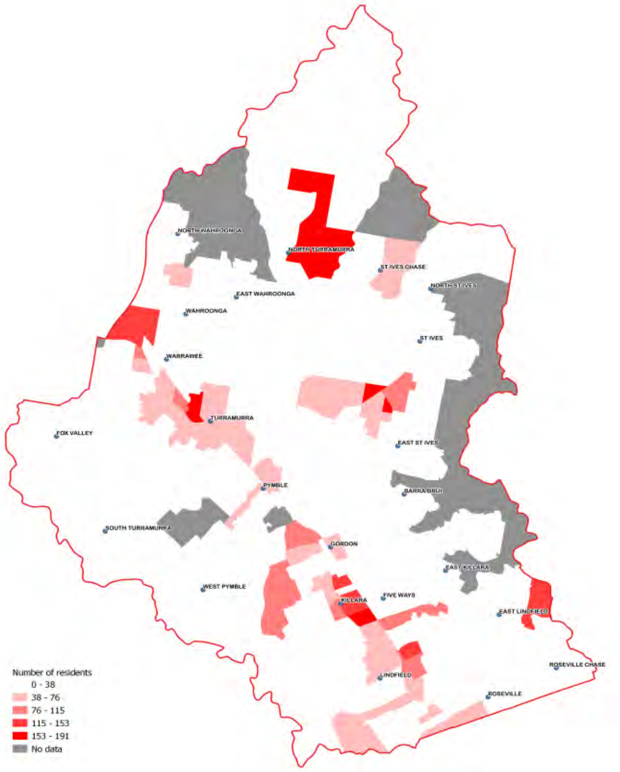
A comparison between total people over 55 people living in apartments between 2011 and 2016, shows a strong consolidation along the rail line. It should be noted that there are anomalies in statistical boundaries between 2011 and 2016.

Figure 86 Over 55 residents in apartments 2011



Source: ABS 2011

Figure 87 Over 55 residents in apartments 2016

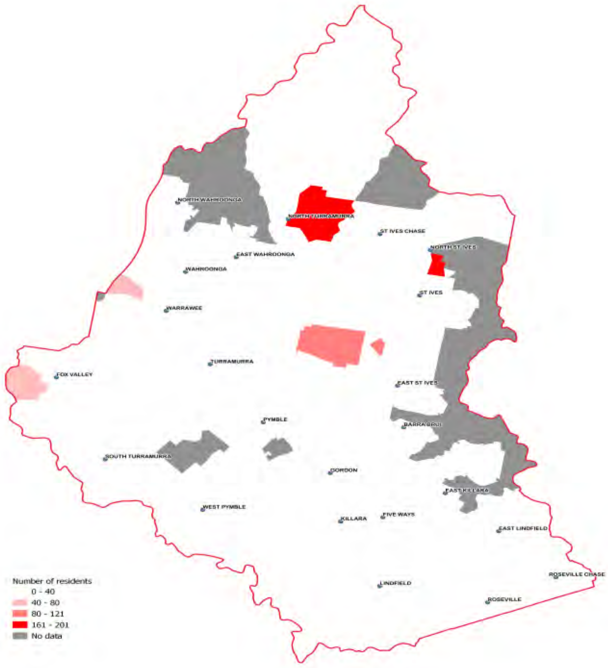


Source: ABS 2016

A visual representation of locations where over 55s are also residing in semi-detached/townhouse style dwellings is also provided below, comparing 2011 and 2016. See **Figures 88** and **89.** Again, it should be noted that there are some anomalies in the mapping due to statistical area changes. It shows that the majority of change has been as a result of development in North Turramurra, specifically for seniors. Given the preference for this style of dwelling for older cohorts, there is likely significant pent up demand for this type of dwelling, particularly in more accessible locations.

Figure 88 Over 55s in townhouses/terrace/villas 2011

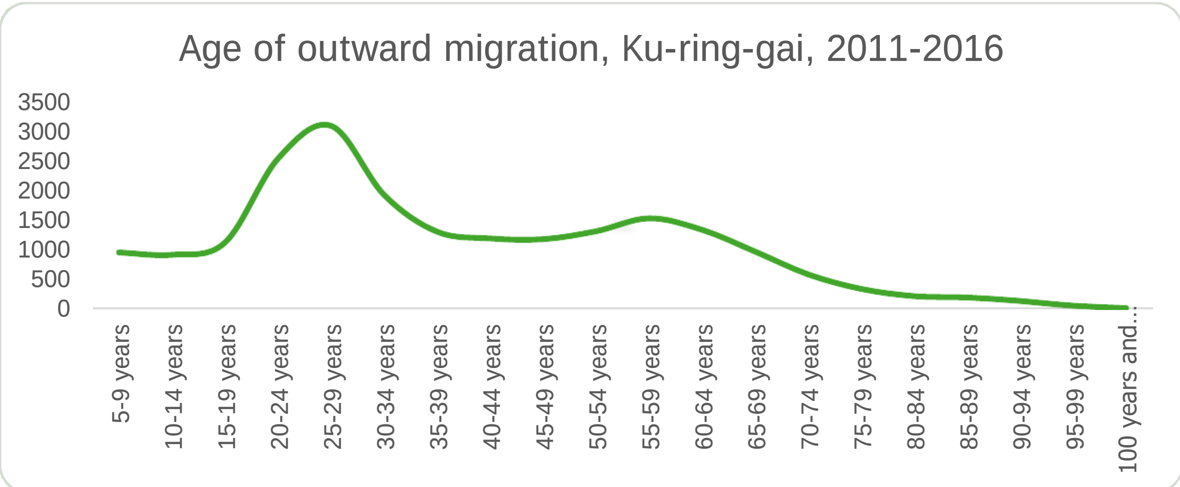
Figure 89 Over 55s in townhouses/terrace/villas 2016



5.1.2 Outward migration of the ageing population

The DPIE forecasts account for outward migration trends. However, examining where people as they age move to, may also provide some cues as to dwelling/lifestyle preferences. There is a small peak in outward migration around the 50 – 60-age range as shown below. See **Figure 91.** 90% of those that migrate out of the Ku-ring-gai LGA (over 50 years of age), remain within NSW. The highest percentage locations for outward migration for people over 50 are shown at **Table 15.**

Figure 90 Age of outward migration



Source: ABS –TableBuilder Pro, 2016, variables AGE5P, LGAU5P, 'Ku-ring-gai (A)' (accessed December 2019)

Table 14 Number of residents re-locating between 2011-2016 aged 50+

	LGA	Number of residents re-locating between 2011-2016 aged 50+	Representation of all outward migration 50+ in NSW
1	Northern Beaches	939	15.98%
2	Hornsby	745	12.68%
3	North Sydney	688	11.71%
4	Willoughby	497	8.46%
5	Central Coast	380	6.47%
6	Sydney	264	4.49%
7	Ryde	206	3.51%
8	Woollahra	199	3.39%
9	Wingecarribee	178	3.03%
10	Inner West	166	2.83%
	Total	**4,262**	**72.55%**

Source: ABS –TableBuilder Pro, 2016, variables LGAU5P, 'Ku-ring-gai (A)' (accessed December 2019)

The Northern Beaches attracts the largest percentage of people in the older age ranges. It should be noted however, from **Table 6** that the Northern Beaches will have much greater increase in over 65 people and lower relatively housing production than the Ku-ring-gai LGA. As a result, it can be assumed that there will be much higher competition for dwellings that are key attractors of older cohorts on the Northern Beaches. Both the Northern Beaches, and the other high attractor LGAs, have significant proportions of both low and higher density dwellings so it is unclear if dwelling type is a driver.

Other key attractor locations are dominated by smaller dwellings including North Sydney, Willoughby, Sydney, Woollahra, Inner West and Mosman. It is assumed that at high proportion of older people outward migrating to these locations are downsizing to smaller dwellings.

Locations like the Central Coast and Wingecarribee are likely to be attracting the sea changers and tree changers (fourth and sixth highest LGAs that attract people from Ku-ring-gai) with typically larger dwellings. Generally, these locations attract fewer former Ku-ring-gai residents than other locations.

It is important to note that forecast population estimates undertaken by DPIE do account for outward migration trends. A key point is that housing for older cohorts across the North District may be increasingly constrained.

5.1.3 Trends in seniors housing development

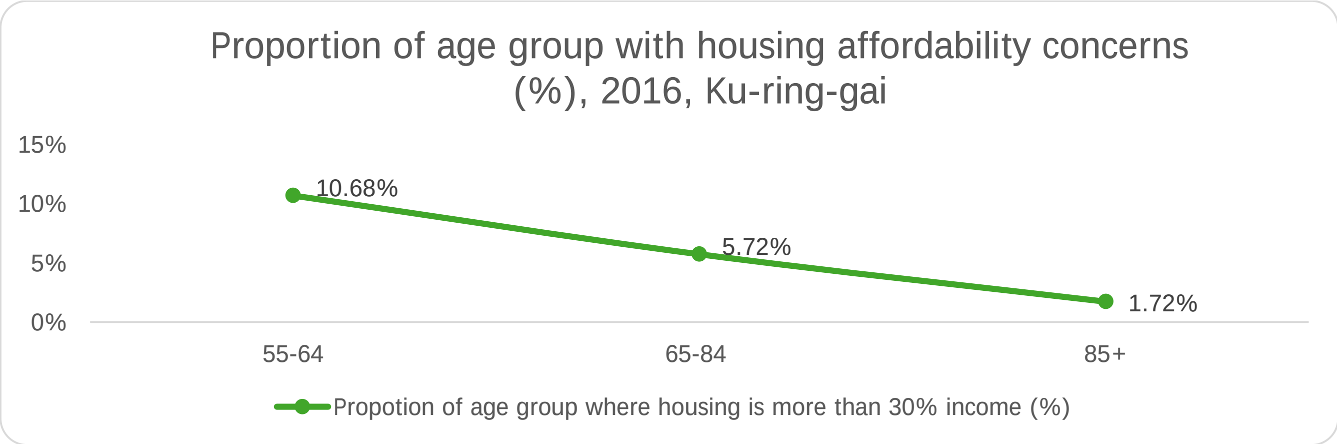
Over 55s Seniors Living development applications have seen fluctuations in Ku-ring-gai. In 2016 and 2017 approximately 6 applications were made each year. This has escalated to 16 applications each year for 2018 and 2019. Note: not all applications are approved and some are Land and Environment Court decision pending.

This is indicative of escalating market demand for diverse housing for people over 55 in the Ku-ring-gai LGA, but also likely a result of the contraction of available zoned land for the broader market for smaller dwelling typologies. Without adequate supply of rezoned land for diverse housing typologies, this trend may accelerate.

5.1.4 Tenure types and housing unaffordability in an ageing population

The proportion of the older populations with housing affordability pressures (more than 30% of household income spent on housing) has been examined from the age of 55. Housing unaffordability is much more common at the younger end of the ageing population (see **Figure 92**), which would indicate that there will likely be an increasing prevalence of this trend in the future. This should be a further driver to downsizing in the future.

Figure 91 Portion of age group with housing affordability concerns



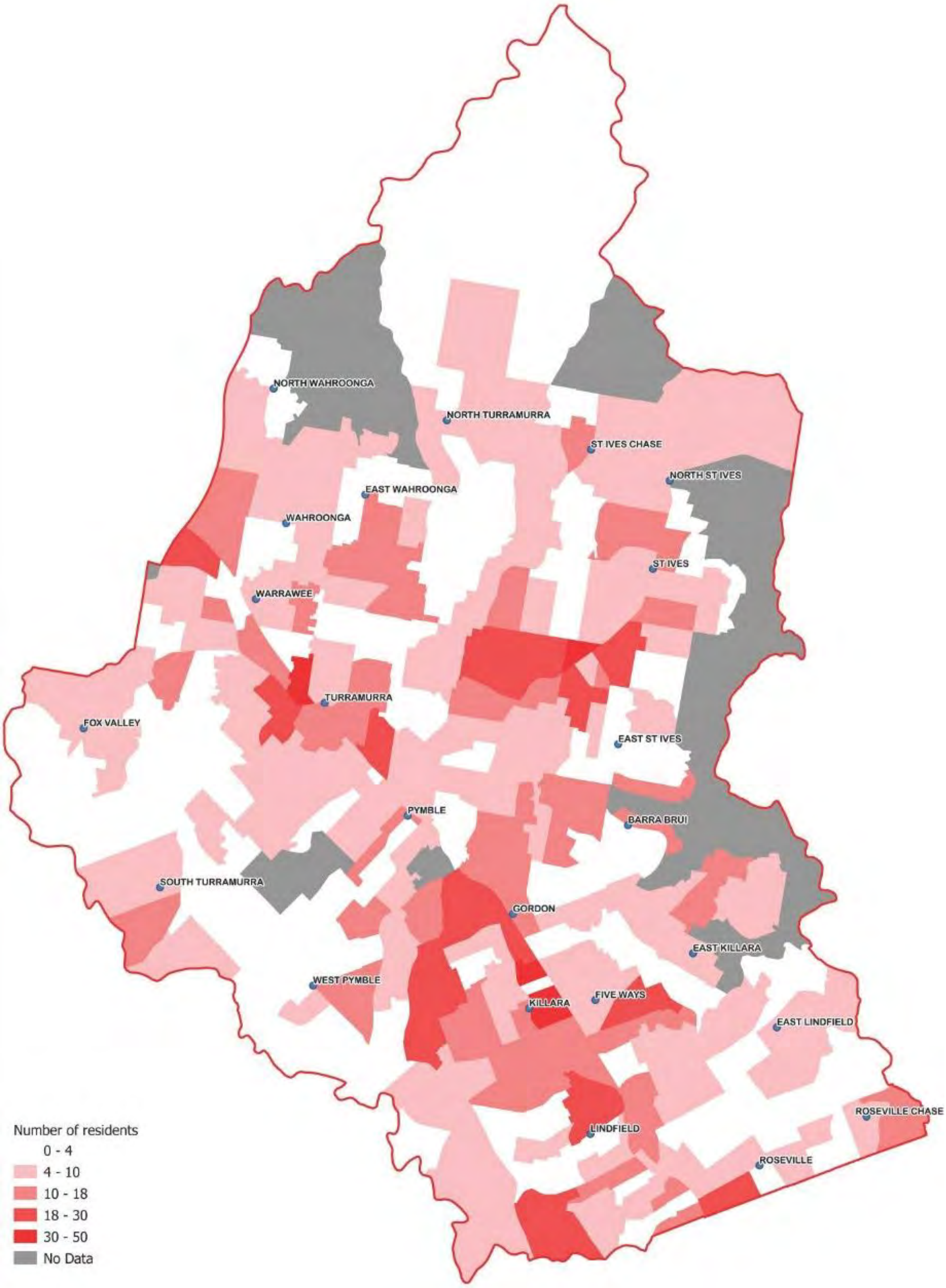
Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, age, housing cost, 'Ku-ring-gai (A)' (accessed December 2019)

The distribution of low housing affordability in over 55 residents is illustrated at **Figure 93.** The mapping would indicate that unaffordability is common in residents occupying a broad range of dwellings (separate through to apartments).

It may indicate that a number of households residing in separate dwellings would benefit from downsizing. It also indicates that a number of older households living in apartments suffer from affordability issues, that is unlikely to improve given the reduced capacity for this age group to participate in the workforce, and lower-cost housing may be required.

From a locational perspective, a large proportion of the residents where affordability is a concern are concentrated in separate dwellings around the key centres on the train line. To enable downsizing for affordability reasons, but also to enable older people to age within the local area, providing greater numbers of smaller housing types in these key locations is likely required. St Ives also has a concentration of over 55 residents with housing affordability issues.

Figure 92 Housing affordability concerns in over 55s in Ku-ring-gai LGA



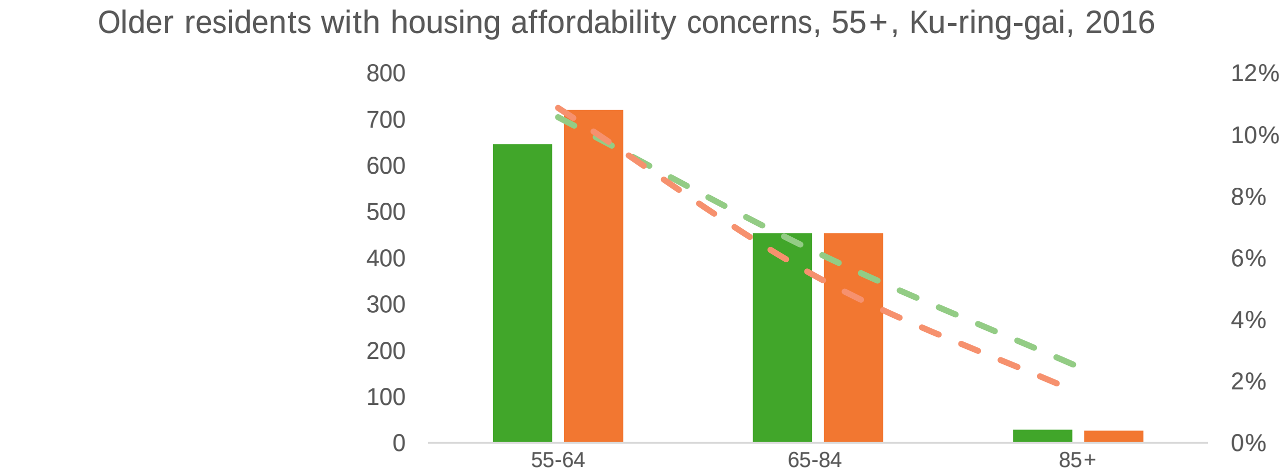
Source: ABS, 2016

Approximately 1,277 people over 55 have housing affordability issues (more than 30% of their income is spent on housing costs). This is more common in females in the 55 – 64-year age range. Therefore, housing affordability is impacting the younger end of the ageing population cohort more and this could indicate an escalating trend especially considering the rise in property prices in the LGA, particularly over the last decade. See **Figure 93.**

More of this 55-64 age group are suffering from low mortgage affordability than their older counterparts. With the very high prices of housing in the LGA in more recent years, this is likely to increase as residents are not able to pay out their mortgage as they get older. This is compared to previous ownership patterns where home ownership has been the dominant tenure type for many ageing LGA residents. See **Figure 94.**

However, rental unaffordability is more prevalent than mortgage unaffordability for people over 55. See **Figure 95.** From a spatial perspective, rental stress in the over 55s cohort is concentrated in locations with a high percentage of apartments, but there are a number people suffering housing affordability concerns in separate dwellings. See **Figure 96.**

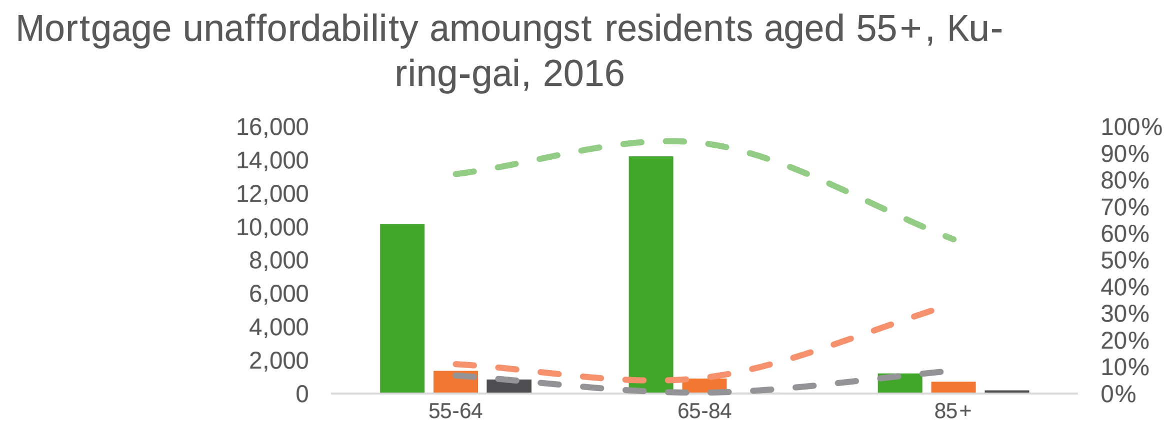
Figure 93 Older residents with housing affordability concerns



	55-64	65-84	85+
Males in housing stress (no.)	646	453	28
Females in housing stress (no.)	720	453	26
Proportion of age group in housing stress (male) (%)	10.56%	6.15%	2.46%
Proportion of age group in housing stress (female) (%)	10.86%	5.36%	1.63%

Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, age, housing cost, sex, 'Ku-ring-gai (A)' (accessed December 2019)

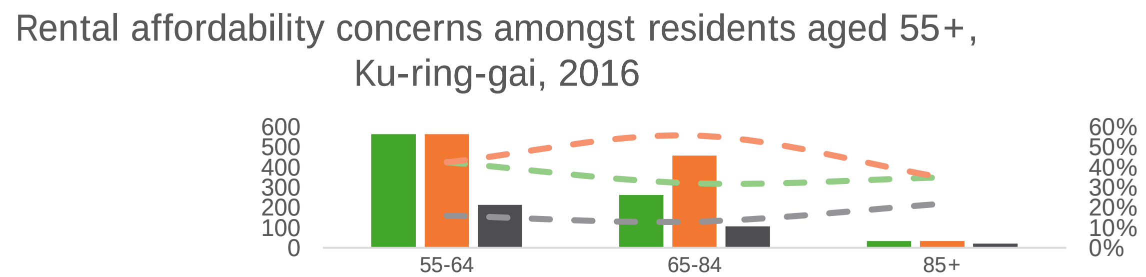
Figure 94 Low mortgage affordability amongst residents aged 55+ (more than 30% of income spent on mortgage repayments)



	55-64	65-84	85+
Less than 30% of household income spent on housing cost (no.)	10,175	14,216	1,209
More than 30% of household income spent on housing cost (no.)	1362	906	704
Unable to determine	838	47	180
Less than 30% of household income spent on housing cost as a proportion of age group (%)	82.22%	93.72%	57.76%
More than 30% of household income spent on housing cost as a proportion of age group (%)	11.01%	5.97%	33.64%
Unable to determine as a proportion of age group (%)	6.77%	0.31%	8.60%

Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, age, housing cost, tenure type, 'Ku-ring-gai (A)' (accessed December 2019)

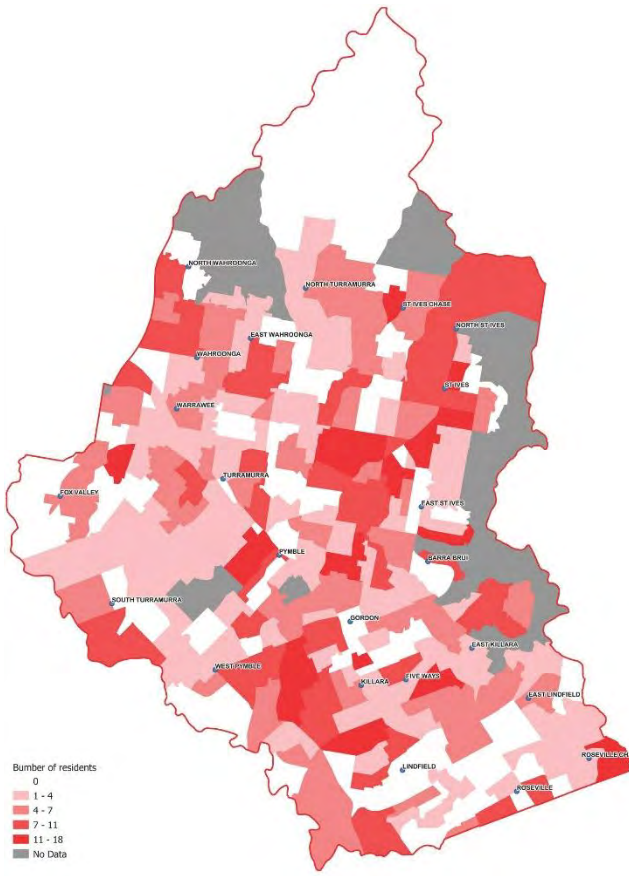
Figure 95 Rental affordability concerns amongst residents aged 55+



	55-64	65-84	85+
Less than 30% of household income spent on housing cost (no.)	562	261	32
More than 30% of household income spent on housing cost (no.)	562	455	32
Unable to determine	211	106	20
Less than 30% of household income spent on housing cost as a proportion of age group (%)	42.32%	31.87%	34.78%
More than 30% of household income spent on housing cost as a proportion of age group (%)	42.32%	55.56%	34.78%
Unable to determine as a proportion of age group (%)	15.89%	12.94%	21.74%

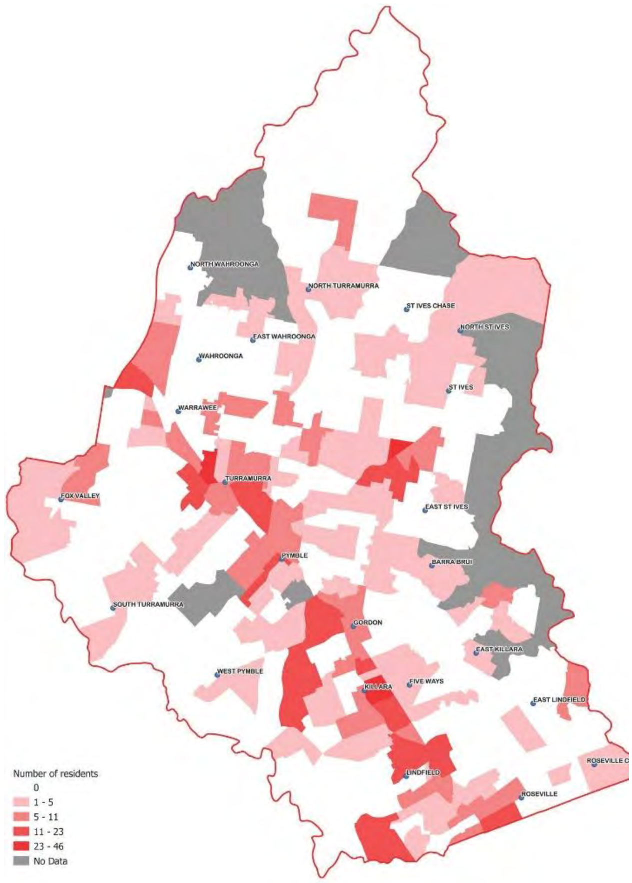
Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, age, housing cost, tenure type, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 96 Mortgage stress over 55 residents



Source: ABS, 2016

Figure 97 Rental stress over 55 residents



Source: ABS, 2016

5.1.5 Trends in aged care residential accommodation

The **Table 15** provides an outline of the number of people in Ku-ring-gai that have been in aged care per year.

Table 15 Number of people in residential aged care facilities in Ku-ring-gai

Reference date	Permanent care		Respite care		Total
	Under 65	65 and over	Under 65	65 and over	
30 June 2010	17	1,028	1	35	1,081
30 June 2011	19	984	1	32	1,036
30 June 2012	15	943	—	26	984
30 June 2013	14	966	—	23	1,003
30 June 2014	21	1,032	—	15	1,068
30 June 2015	19	983	—	17	1,019
30 June 2016	15	983	—	34	1,032
30 June 2017	15	867	—	35	917
30 June 2018	19	950	—	22	991

Reference date	Permanent care		Respite care		Total
30 June 2019	13	932	2	34	981

(a) In contrast to LGA of Home Care Package recipients and Commonwealth Home Support Programme recipients, LGA of aged care residents is directly determined from the address of the facility.

Source: GENData

As at 2016, there were 21,700 people over 65 in the Ku-ring-gai LGA. At that time 4.5% (983 out of 21700 people) of the over 65 population, resided in a residential aged care facility.

The forecast growth in over 65s to 2036 is from 21,700 to 30,245 people, representing a growth rate of 39%. Extrapolating this data, an additional 387 residential aged care places would be required in Ku-ring-gai. It is noted that the health of older people is expected to continue to improve, and therefore, independence for longer can be expected. However, the forecast age profile of Ku-ring-gai shows a significant increase in older persons in the 85+ bracket by 2036 where there is greater likelihood of requiring care. See **Figure 14 and 15 in Section 3.4.2.**

This equates to approximately 97 additional aged care residential places per five-year period, which equates roughly one facility[16] (calculations provided at **Section 15**).

The additional numbers of people in residential aged care will not make a significant impact on market dwelling requirements due to the following:

» Many will have moved from their original home (either separate or other)

» Of the remaining portion, a partner may still be residing in their market dwelling.

5.1.6 Assumptions as a result of the trends in housing analysis for an ageing population

Apartment demand assessment for an ageing population

The following methodology and assumptions have been made for assessing the likely demand for apartments from the ageing population:

» There is an escalating trend towards smaller dwelling choice in over 55s, albeit from a low base. As at 2016, 5,411 people over 55 lived in apartments.

» There will be a 14% growth in people over 55. To extrapolate the same proportion of people over 55 living in apartments, the current number is multiplied by 114%

» There was a six-fold increase in apartments over 4 storeys occupied by over 55s between 2006 and 2016. This accelerated between 2011 and 2016. This rate of growth is not able to be extrapolated over the next 20 years as this would result in more people over 55 living in apartments than are forecast to be residing in Ku-ring-gai by 2036. Therefore, a more modest growth rate has been applied (3% growth per annum) which would result in just over a doubling of the number of people over 55 living in apartments between 2016 – 2036. Compared to the trend in over 55s choosing to occupy this type of dwelling in recent years, this is highly conservative. This would result in approximately 22% of people over 55 living in apartments by 2036.

» This would result in a forecast of 11,141 people over 55 living in apartments.

» The current number of over 55s living in apartments is then deducted from this figure to estimate the number of additional people over 55 to be accommodated in apartments.

[16] Discussions with an age care service provider indicate that approximately 100 beds is the minimum number per facility for viability, when delivered in conjunction with other seniors living development.

» Applied to this is a 1.5-person occupancy rate per apartment, which assumes equal split between couple-only and lone-person households. This results in a conservative dwelling requirement as lone-person households are more likely to choose this dwelling type.

» This results in a requirement estimate of 3,820 apartments to service the ageing population in Ku-ring-gai as outlined at **Table 16.**

Table 16 Ageing population apartment demand estimate 2016 - 2036

Ageing population apartment demand estimate	2016	2016	2021	2026	2031	2036
ABS data	Number of over 55 living in apartments	5,411				
ABS	Applied growth rate in over 55s to 2036 (14% to 2036)	6,169				
See assumptions above	Growth rate in over 55s living in apartments (600% increase from 2006 - 2016 but from a very low base - assumes a more modest growth of 3% growth per year)	3% per annum	7,151	8,290	9,610	11,141
	Minus number of existing people over 55 residing in apartments		1,740	2,879	4,199	5,730
	Implied apartment dwelling requirement for over 55's based on 1.5 person average dwelling size		1,160	1,919	2,800	3,820

Semi-detached townhouse/villas forecast demand for an ageing population

The following assumptions have been made regarding the future demand for semi-detached/townhouse/villa type dwellings from the over 55 population:

» The percentage of the proportion of over 55s population peaks at approximately 12% in the 85 plus age range in this type of dwelling

» As this type of dwelling stock is highly under-represented in the Ku-ring-gai LGA (approximately 4% of all dwellings), with strong competition from a range of age groups, it is assumed that there could be significant unmet demand. Therefore, should stock be available, up to 15% of the over 55s cohort are expected to choose this type of dwelling. Between the assumption of approximately 22% of over 55s downsizing to apartments, an additional 15% downsizing of older households to this type of dwelling is assumed.

» This, combined with the apartments, would mean that this would make up the 37% of over 55s that either have or intend to downsize, in line with findings from AHURI Research previously outlined.

Therefore, the methodology used to estimate demand is:

» Total forecast population over 55

» 15% of total forecast population over 55 to calculate the number of people likely to downsize to a semi-detached/townhouse/villa style accommodation

» Forecast number minus number of people over 55 living in this type of dwelling

» Number of people divided by an occupancy rate of 1.5. This assumes an equal split between lone person and couple-only households. At present lone person households are more represented in this type of dwelling. Therefore, it is a more conservative estimate of dwelling requirements.

Minimal delivery of this typology of housing is expected to 2021 due to lack of suitably zoned land. Therefore, the total is extrapolated for delivery between the 2021 and 2036 period. It should be noted that the feasibility of this type of development has not been assessed as part of this Housing Needs Study and there may be a requirement to modify the dwelling mix accordingly over the period to 2036.

Table 17 Forecast aging population dwelling types 2016 - 2036

Ageing population - semi-detached/townhouse/villa demand		Factor	2021	2026	2031	2036
ABS data	Forecast number of people over 55 by 2036	47,505				
AHURI Research moderated for Ku-ring-gai minus apartment downsize percentage	Estimated percentage of people over 55 that would downsize to semi-detached/townhouse/villa (15%)	7,126				
ABS data	2016 numbers of over 55s that currently reside in semi-detached/townhouse/villa	1,712				
	Increase in numbers over 55 likely demanding this typology	5,414				
	Average household size (assumes equal lone and couple-only households - 1.5 per household)	3,609				
Theoretical demand minus current supply	Undersupply and projected delivery required to meet demand in five year increments			1,203	2,406	3,609

Forecast demand for age care residential accommodation

The following methodology has been used to determine future demand for aged care accommodation:

» The number of people in residential aged care over 65 years as at 2016 (983 persons)

» The above divided by the number of people over 65 years at 2016 to get a percentage rate (21,700 person or 4.5% of the over 65 population)

» Total forecast population over 65 as at 2036 (30,245 person) times 4.5% to get the total number of people likely to require residential aged care. The total demand is therefore 1,370 places.

Note: While increasing health of older people is evident, there is an expected increase in the proportion of older people over 85 in Ku-ring-gai (**see Figure 15**). As this is the key cohort for this type of residential accommodation, it is therefore expected that demand remains fairly constant.

» The current number of places available is assumed to remain constant and is therefore deducted from the total demand to calculate likely additional demand (1370 persons minus 983) providing the additional demand of 387 persons.

» Divide by 4 periods over the 20 years to assess additional places required in each 5-year period (97).

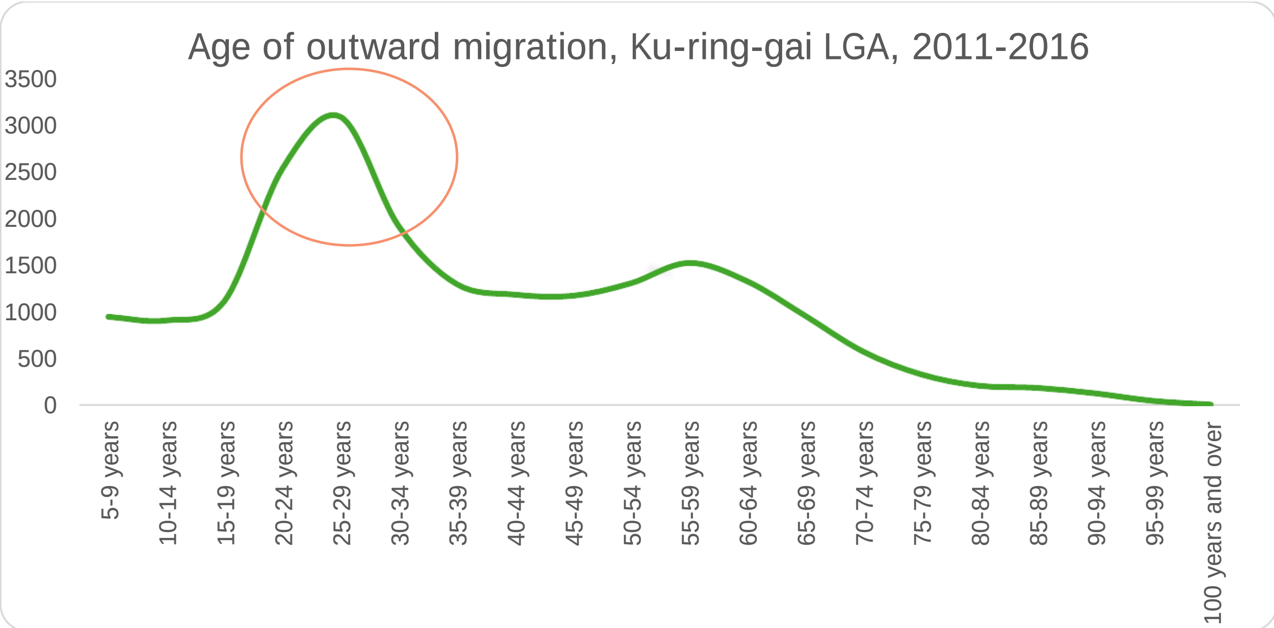
The total demand for the ageing population is provided in the overall housing needs assessment provided in **Section 15** of this report.

6 Young adults and starting-out families

Young adults exhibited some of the strongest growth in Ku-ring-gai, albeit from a lower base than other age groups. Between 2006 – 2016, young adults increased between 40 – 43% (see **Section 3.1.1**). Conversely, the peak of outward migration is in this age cohort. See **Figure 99.** There is expected to be a downward trend in this cohort from 2016 to 2036 as illustrated in **Figure 15.**

To understand the dynamics, both the choice of dwellings within the LGA and patterns of outward migration of young adults need to be analysed to determine if housing delivery can further support this cohort residing within the Ku-ring-gai LGA.

Figure 98 Age of outward migration 2011-2016



Source: ABS, 2016

Approximately 3,000 of the 20-29-year age group migrated out of the LGA between 2011 and 2016. The top destinations for outward migration in this cohort is mapped at **Figure 100.**

By far the largest outward migration recipient from Ku-ring-gai in this cohort is the Hornsby LGA, followed by Willoughby and the Northern Beaches. The high migration to Hornsby would indicate that housing cost is a key driver. The greater diversity of housing in Willoughby and Northern Beaches are also likely to be drivers i.e. greater numbers of lower-cost housing typologies such as apartments, as well as lifestyle choice.

Lifestyle choice (Sydney CBD and Inner West) appear to much lower drivers of outward migration as does significantly lower cost locations (Lake Macquarie, Parramatta and Ryde).

Figure 99 Outward migration of 20 – 29 year olds - location

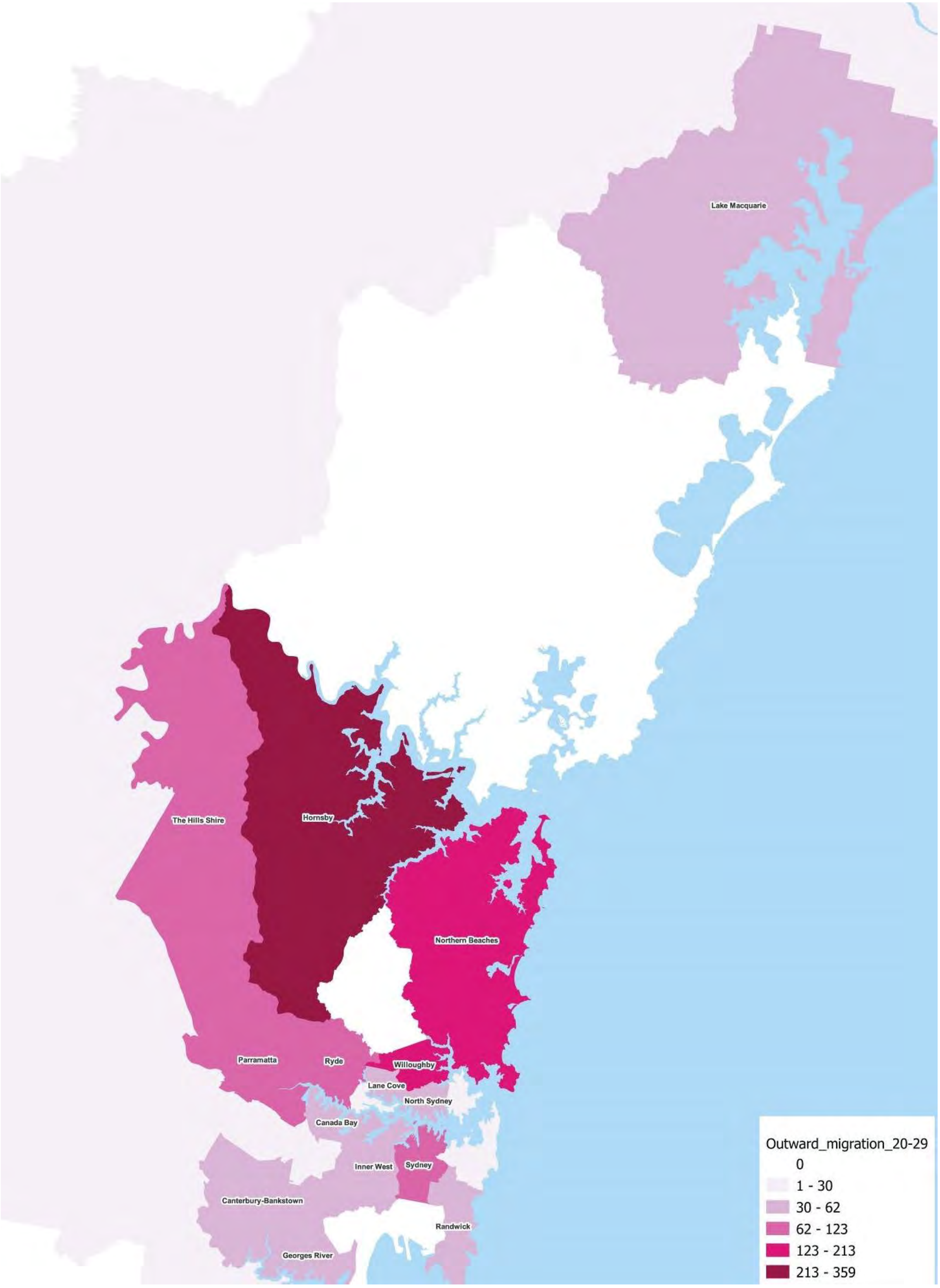
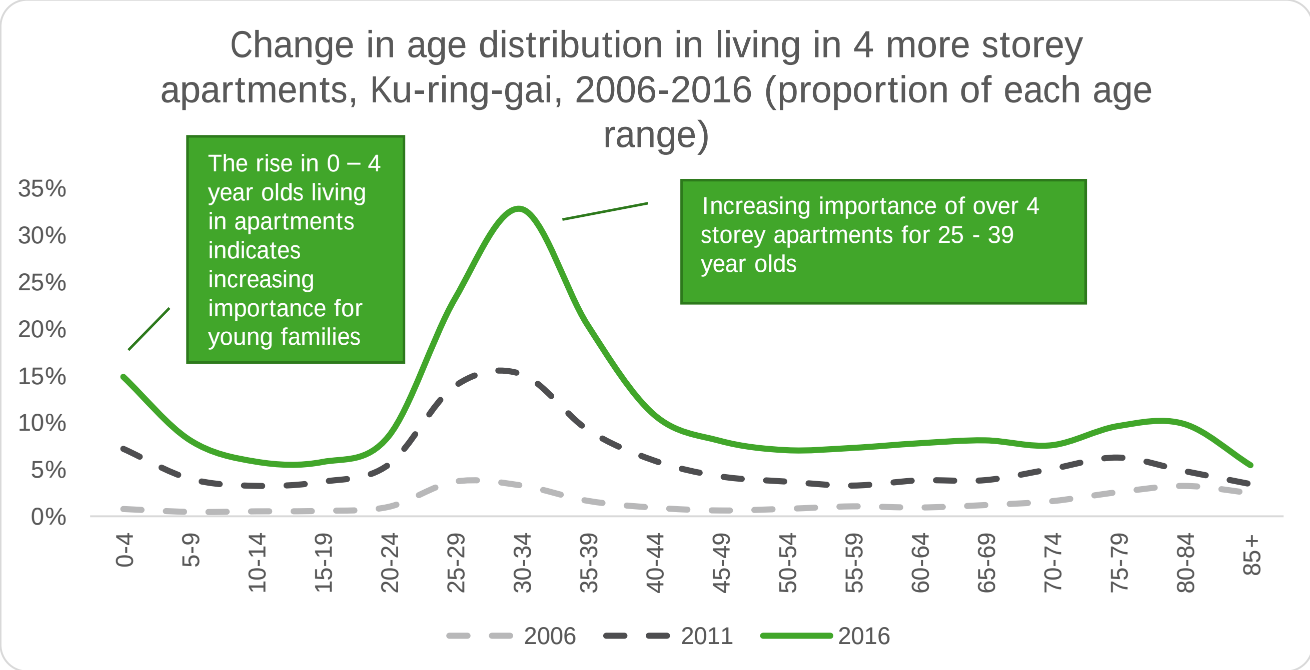


Figure 101 shows that apartment living (over 4 storeys) has become increasingly attractive to the 25- 39 cohort within the Ku-ring-gai LGA with approximately 20 - 33% of residents occupying apartments (4 storeys or more) in this age range. The rising proportion of 0-4-year olds in this style of dwelling also indicates that it is also an important source of housing for starting-out families.

The proportion of this age group that lives in apartments has risen ten-fold over the 2006 – 2016 period, when most of this dwelling stock was produced. This may account for at least some of the growth in this age group living in the LGA (40%+ increase between 2006 – 2016).

Figure 100 Change in age distribution in living in 4 more story apartments 2006 2016



A map of this cohort renting and with mortgage is provided in **Figures 102 - 103.**

For renting, there has generally been an intensification of this cohort where new apartment stock has been delivered such as Boundary Road, Roseville and St Ives. There has been a contraction in areas that are dominated by single dwellings.

Mapping also shows that new apartment delivery has also been an important purchase option.

To maintain the proportion of this age cohort living in the LGA, and support additional growth, apartment development is essential. However, there is also a strong preference for purchase by this cohort along the train line, likely for accessibility reasons. Additional intermediary housing for this cohort, such as townhouses, may further support younger adults and families living in the area. This is explored in **Section 8** where further discussion is provided on housing need for established families.

Figure 101 25-39 year olds renting in the Ku-ring-gai LGA 2011

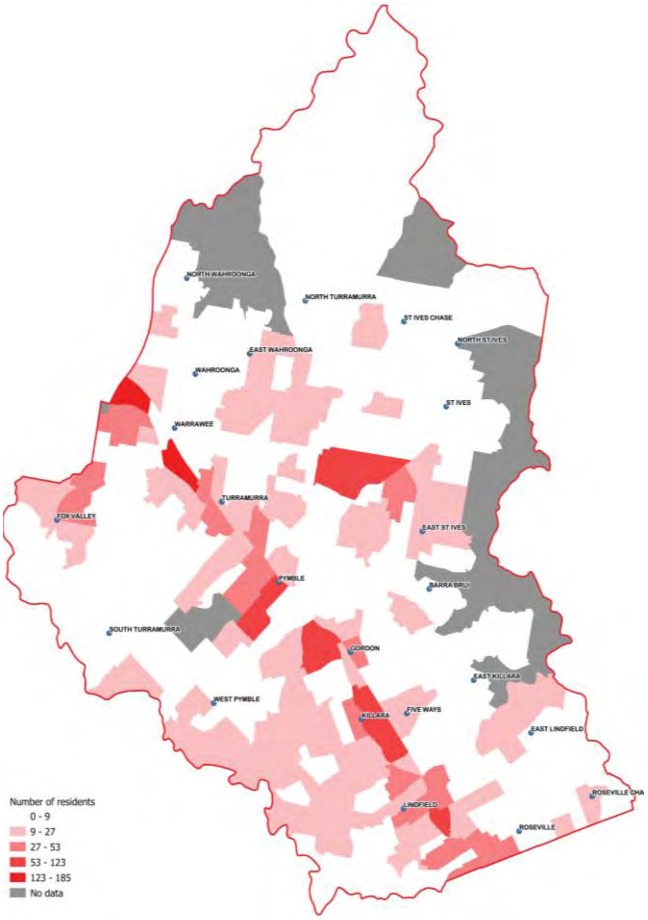


Figure 102 25-39 year olds renting in the Ku-ring-gai LGA 2016

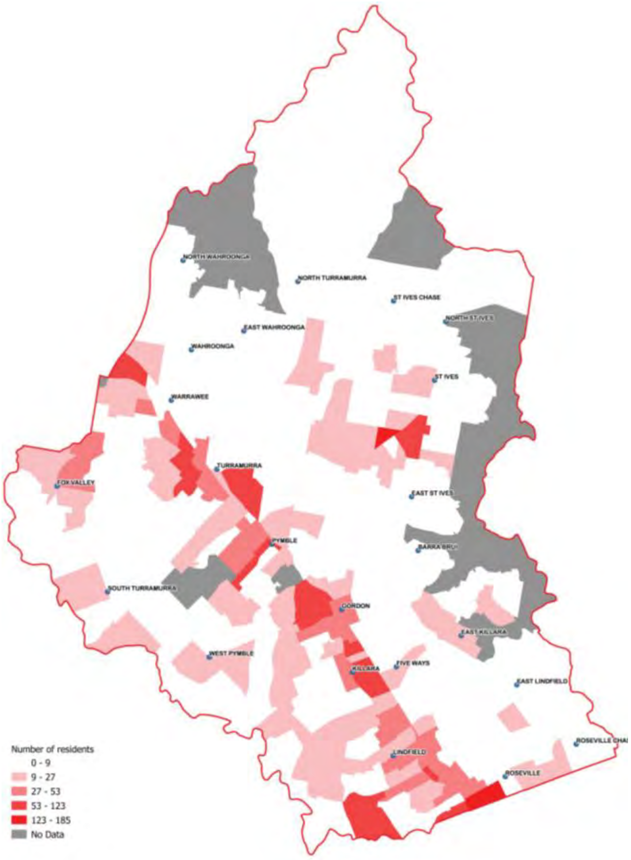


Figure 103 25-39 year olds renting in the Ku-ring-gai LGA distribution

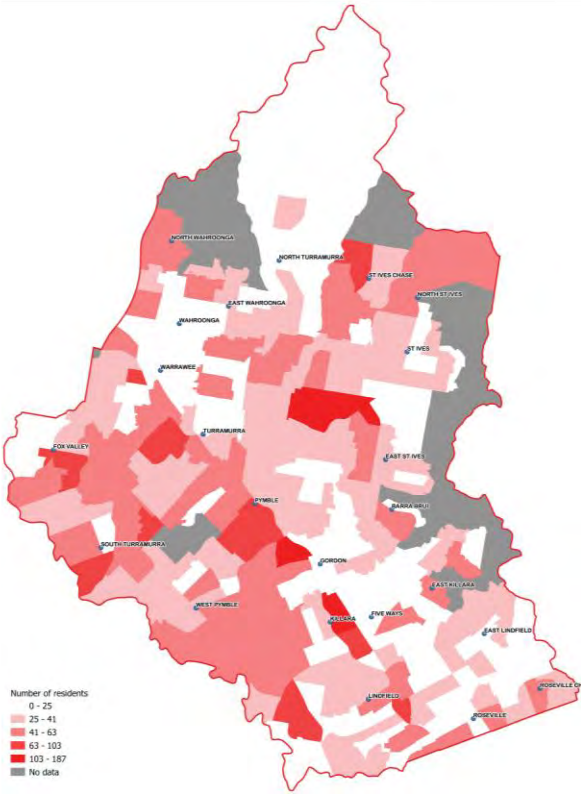
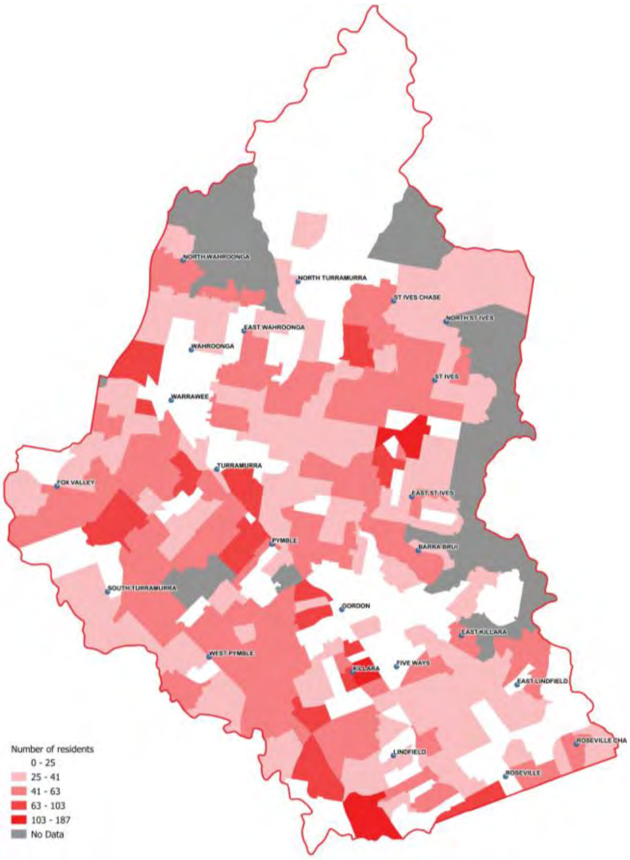


Figure 104 25-39 year olds with a mortgage in the LGA 2016



6.1 Housing needs analysis for young adult cohort

Methodology

The following methodology was used to determine the supply of housing to support young adults and starting out families in the LGA. They key is to provide sufficient apartments to not constrain supply and hence, worsen affordability. The demand analysis is baseline in that is enough to maintain the existing proportion of young adults in this type of dwelling stock. Then a calculation has been undertaken to assess need to maintain the same proportion of growth in younger adult cohorts that the LGA experienced between 2006 – 2016 (40%).

» The number of 24 – 39-year olds currently living in apartments

» Number of 24 – 39-year olds living in apartments by the overall expected growth rate in the LGA minus the current numbers living in apartments

» The above divided by an average household size of 1.75 persons (assumes that approximately 50% of apartments have a young child in them which is indicated by the age profile in apartments 4 storey or above). This derives the figure that would be a minimum to assist maintain the proportion of young adults choosing to reside in the LGA.

» There has been an approximate 40% growth rate in this age cohort between 2006 – 2016, likely as a result of increased supply of smaller dwelling typologies. To encourage continued growth in this cohort, the implied apartment requirement is then multiplied by 140%. The results are provided at **Table 18.**

Table 18 Forecast demand for apartments 2016 -2036

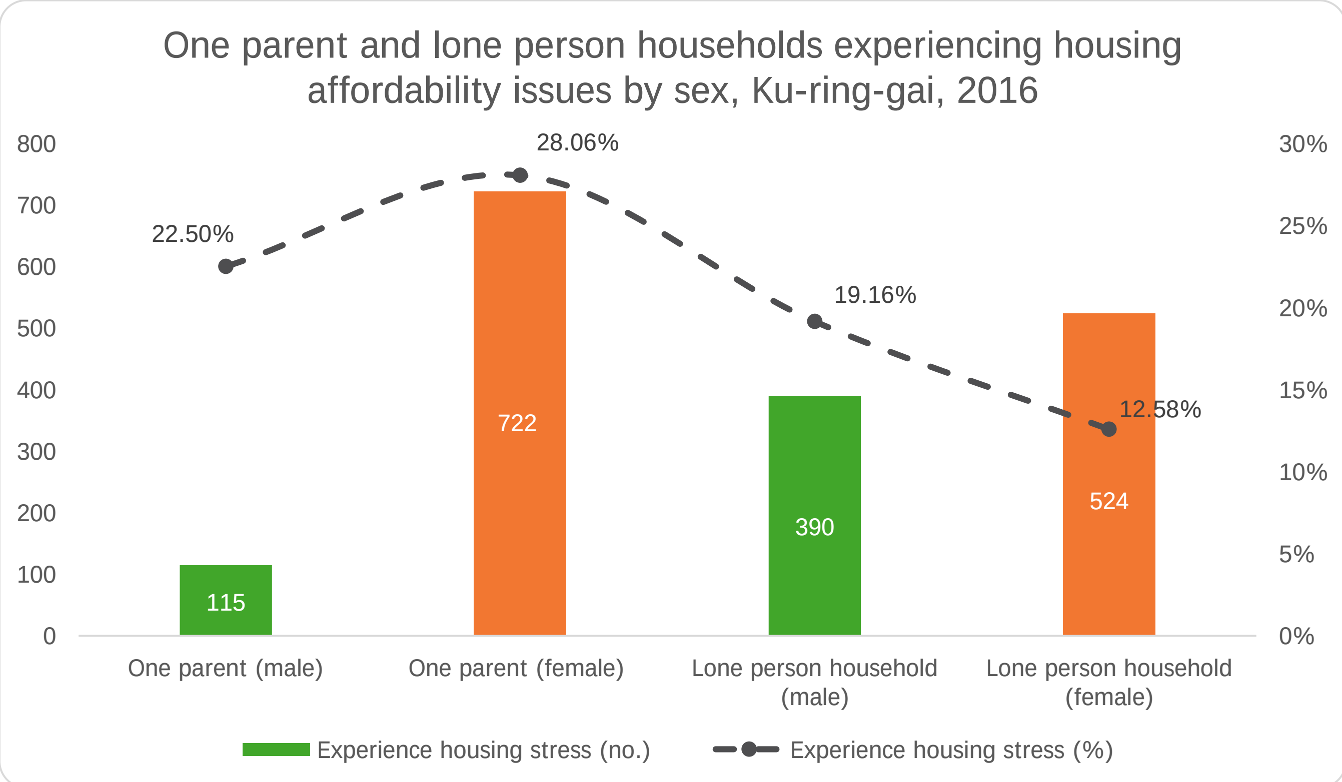
Demand for apartments - Young adults (25 - 39)	Implied dwelling requirement to each year				
		2016–2021	2022-2026	2027-2031	2032-2036
Residents aged 25 - 39 currently living in apartments	5,438				
Overall growth rate 20.69% to 2036	6,575				
Additional likely number of residents if proportion maintained	1,137				
Number of apartments required with an assumed average household size of 1.75		162	325	487	649
Apartment dwelling requirement to maintain 2006–2016 levels of growth in the 25 – 39 cohort (40%)		227	455	682	909

7 Gender and housing need

Ku-ring-gai has a larger number of adult females than males in all adult age group categories. This indicates that there could be a larger percentage of female lone-person households or one parent households.

There are fewer male lone-person households than female lone-person households. The percentage of female lone-person households experiencing housing affordability issues is less than their male counterparts. See **Figure 106.** The proportion of housing unaffordability is not remarkably above the baseline rate for the LGA**.** Therefore, specific actions regarding lone person households are not considered necessary, since most will also be included in other assessments – market housing for the ageing population and the Affordable Housing assessment in **Section 14.** Younger lone person households are addressed in the needs assessment for apartment dwellings for young adults in **Section 6**.

Figure 105 One parent and lone person households experiencing housing stress by sex 2016



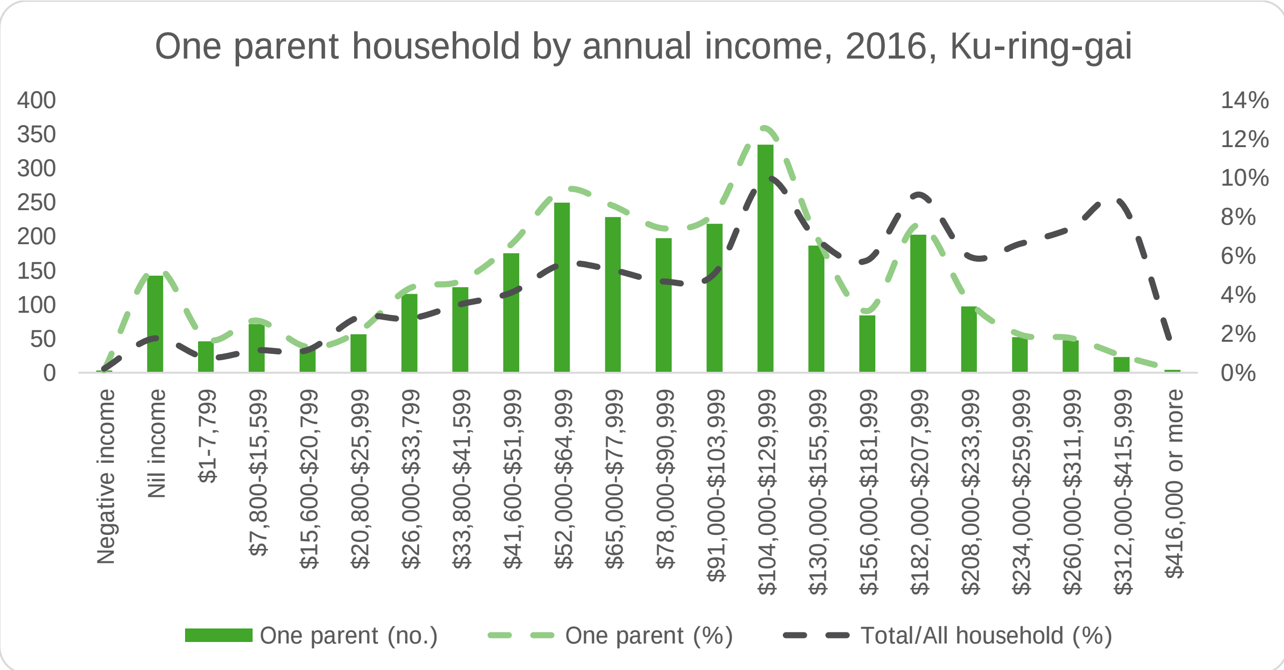
Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, sex, household/family composition, housing costs, 'Ku-ring-gai (A)' (accessed December 2019)

There is also a key question of any differences in gender for households in housing stress. Most one parent households generally have a household income at the moderate or below Greater Sydney median household income. See **Figure 107.**

The percentage of male and female one parent families experiencing affordability issues are more acute and explored further below.

It is clear from the data that one parent female-headed households are more numerous (722 compared to 115) but the percentage of those where housing affordability is of greater concerns is 28% female headed compared to 22% male headed which does not represent a significant difference.

Figure 106 One parent household by annual income

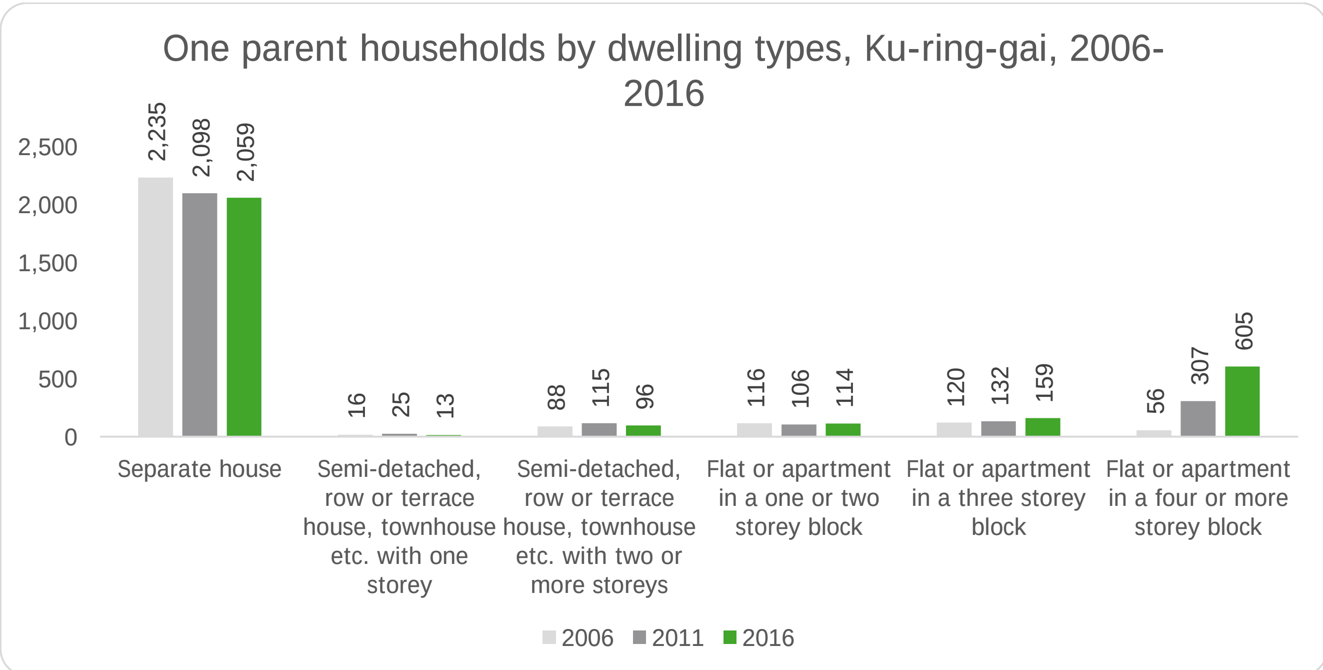


Source: ABS - TableBuilder Basic, 2016, variables HIND, HHCD 'Ku-ring-gai (A)' (Accessed April 2019)

7.1.1 Trends in one parent households and dwelling types

There is a distinct trend for one parent households to increasingly reside in apartments 4-storey and above, with the number residing in dwelling houses declining. The number of one parent households living in apartments rose between 2006 – 2016 by 549 (10-fold growth or 900%), while those residing in single dwellings fell by 176.

Figure 107 One parent households by dwelling types 2006-2016



The following mapping shows female-headed one parent households with affordability concerns. In comparison, the number of male-headed one parent households is very small and those with affordability concerns are more spatially confined in the LGA. See **Figures 108 and 109.**

While affordability concerns are concentrated in areas with apartments, there are still a significant number that reside in areas dominated by single dwellings.

It is assumed that a further trend towards apartment living, particularly for female-headed lone person households, would be expected. A minimum doubling of this household type over the 20-year period to 2036 is assumed and growth is extrapolated by the forecast household type.

Figure 108 One parent female households 30% of more income spent on housing

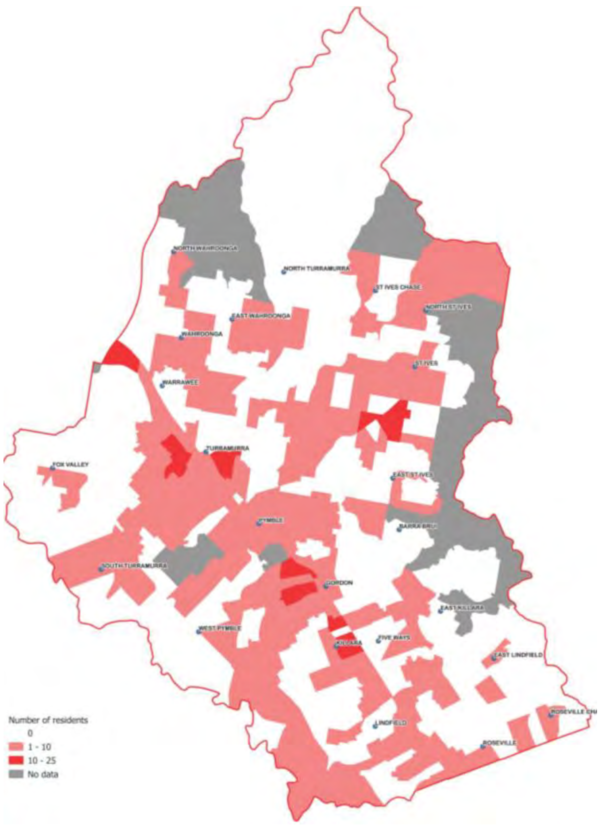
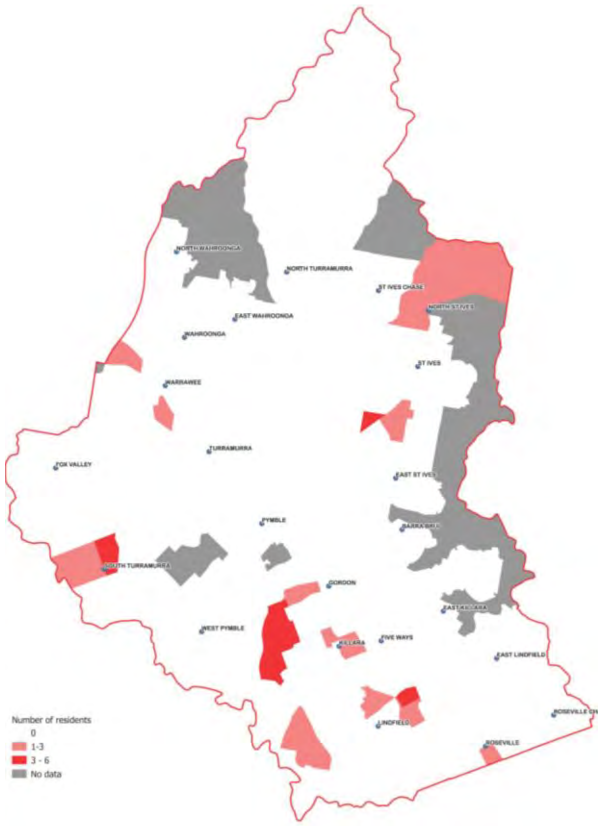


Figure 109 One parent male households more than 30% of income spent on housing



Methodology of growth in apartment living for one parent households

The following has been assumed regarding one parent households in assessing housing need:

» A conservative estimate of a 100% growth in apartment living for one parent households over the 20-year period to 2036 (i.e. 549 additional one parent households lived in apartments between 2006 – 2016, a ten-fold growth rate - 56 households rising 605 households)

» Multiply the growth by 33% (the projected rate of growth of one parent households (DPIE Population Projections 2019)

» Minus number of one parent households currently living in apartments.

Table 19 Projected growth in apartment dwelling required for one parent households

Implied apartment demand for one parent households	
One parent households residing in apartments 4- storey and above(2016)	605
Forecast growth in one parent households residing in apartments (assumes 100% growth over 20 years which is more conservative than the 10-fold increase between 2006 - 2016)	1210
Growth rate in one parent households forecast (2016 - 2036)	33%
Estimated total demand for apartments at 2036 - one parent households	1609
Minus number of one parent household living in apartments 4-storey and above **Likely requirement for apartments for lone person households**	1004

8 Established families with children housing need

8.1 Change in types of dwellings occupied by families with children 2006 – 2016

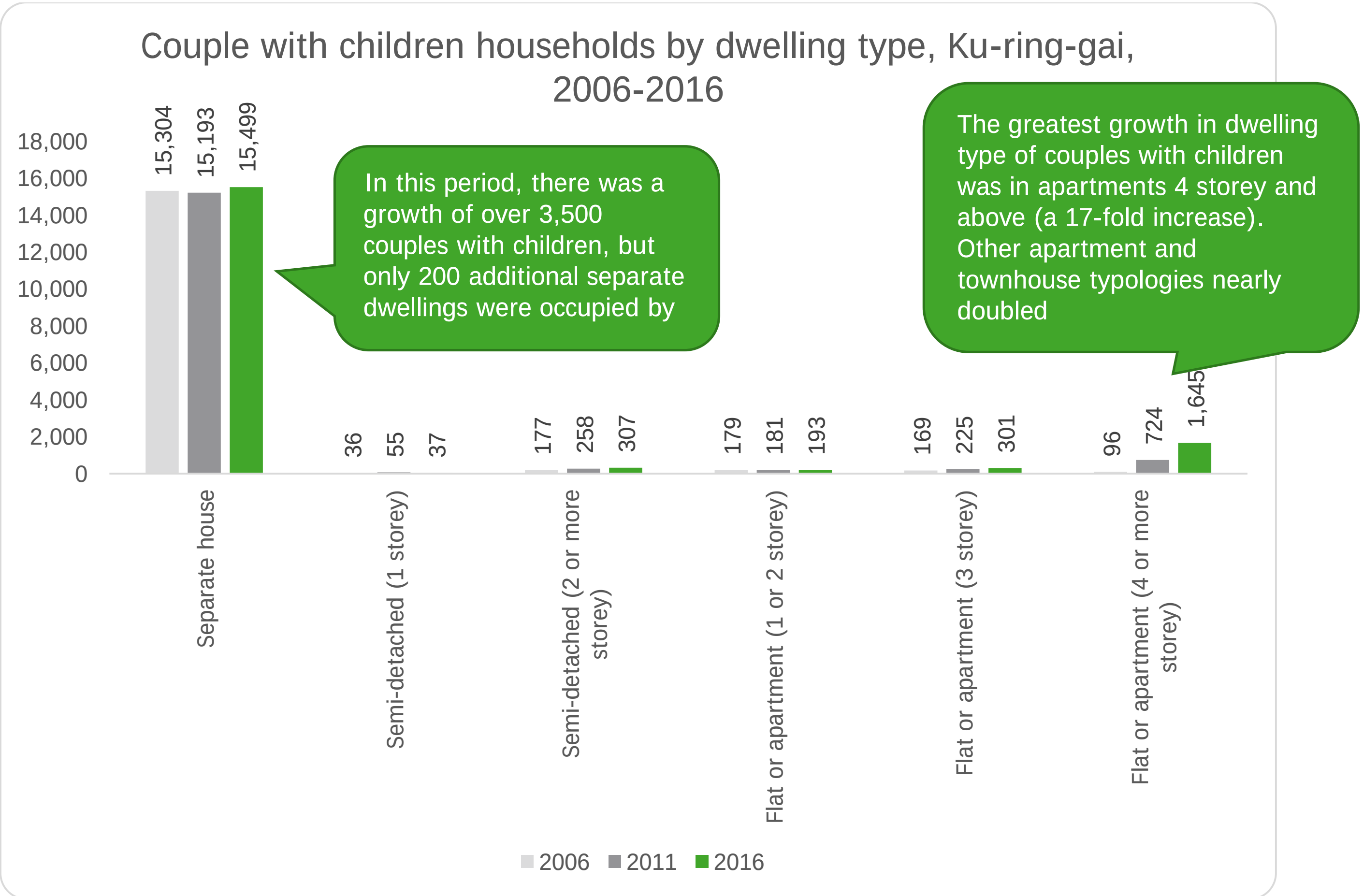
Despite exhibiting the highest growth in household type, there has been little change in the number of separate dwellings occupied by couples with children between 2006 – 2016 (200 additional separate dwellings occupied by this household group compared to approximately 3,500 additional couple with children households in total). There is projected to be an additional 3,455 couple with children households by 2036, about half the growth rate pf that between 2006 and 2016.

The greatest growth of dwellings types occupied by couples with children households was apartments, with some more modest growth in lower-scale non-separate dwelling typologies. See **Figure 111.**

As already seen, there is a trend towards starting-out families residing in apartments (over 4 storey typology) outlined in **Section 6**. However, the very low growth in couples with children residing in separate dwellings would indicate a greater need for other medium density housing options.

Over the 2006 – 2016 period, there was growth in one and two dependent children households, which would confirm that smaller housing stock may be suitable for this household type. See **Figure 112.**

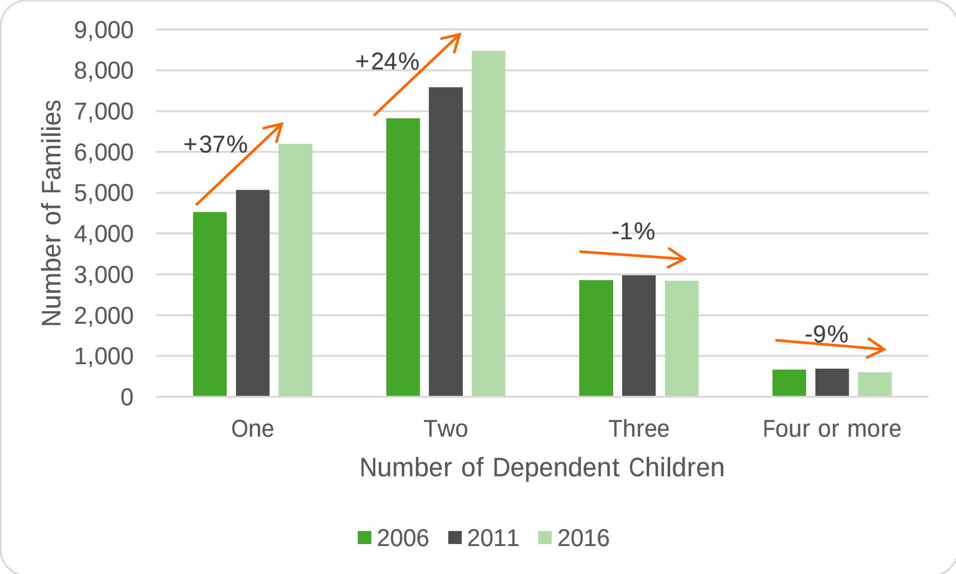
Figure 110 Couple with children households by dwelling type 2006-2016



Source: ABS –TableBuilder Pro, 2006, variables, STRD, FMCF, 'Ku-ring-gai (A)' (accessed December 2019)

Source: ABS –TableBuilder Pro, 2011, 2016, variables, STRD, HCFMD, 'Ku-ring-gai (A)' (accessed December 2019)

Figure 111 Household sizes with decreasing children numbers



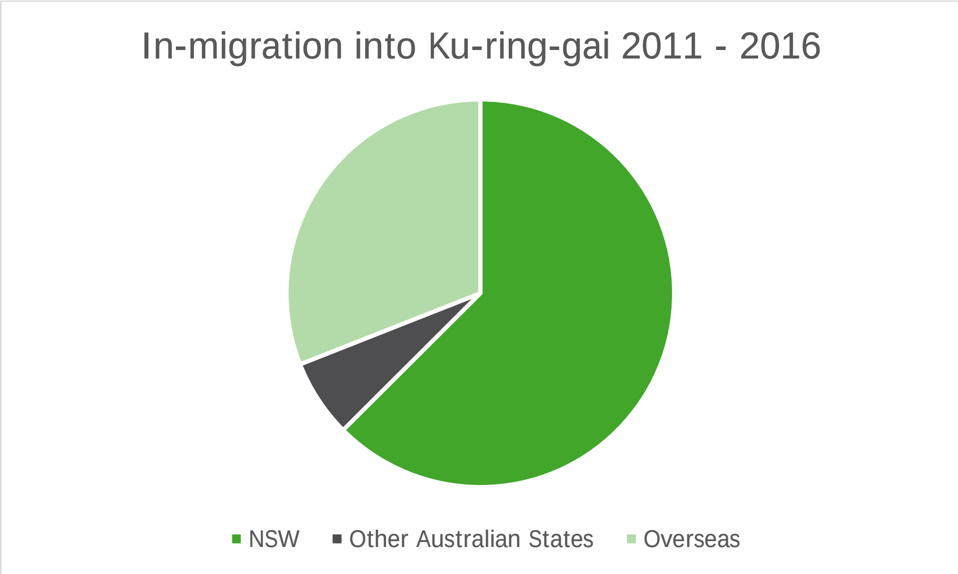
Source: ABS – Time Series Profile (2016) Ku-ring-gai – Count of families with dependent children usually resident from 2006-2016

8.2 Established families and inward migration trends from other parts of Australia

The key driver of growth in couples with children in Ku-ring-gai is inward migration, with roughly two-thirds coming from other parts of NSW, while the remaining third is from overseas and other Australian States. Inward migration to separate houses is the dominant dwelling typology choice (see **Figures 114, 115 and 116**) but apartments in key centres are also important sources of residential accommodation.

The profile of net inward migration shows that established families from other parts of Australia (35 – 44 age group) are the largest group, usually with one to two children per family. While separate dwellings are the dominant choice, there are a number of families choosing apartments and townhouse. This would confirm that greater choice in the townhouse typology could create greater housing opportunity for established families.

Figure 112 In-migration into Ku-ring-gai 2011-2016



ABS, 2016 Census

Figure 113 Inward migration from other parts of Australia to separate houses 2011 – 2016

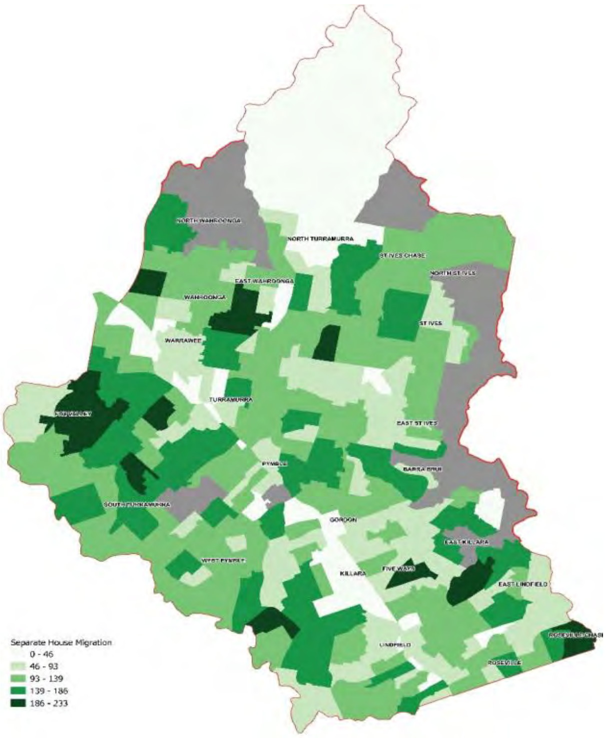
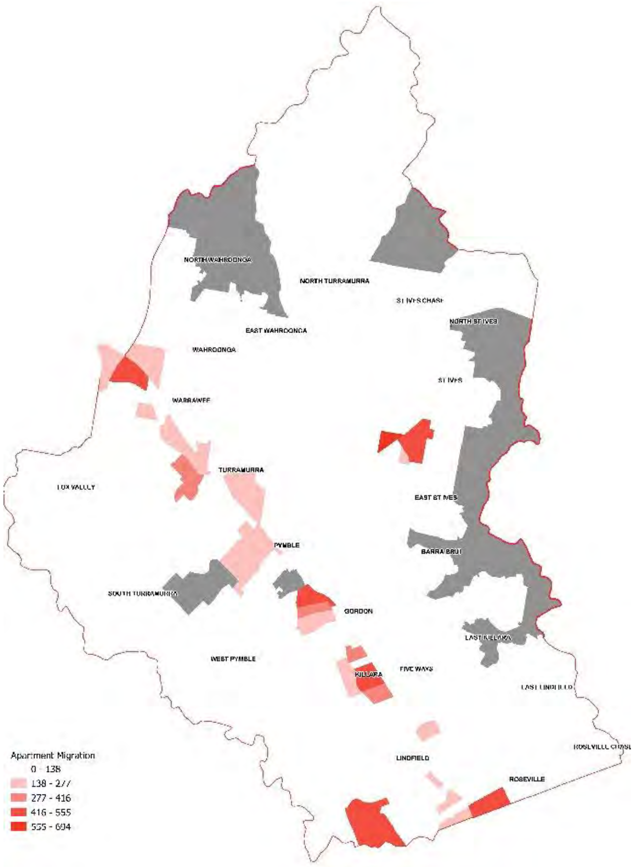


Figure 114 Inward migration from other parts of Australia to townhouses 2011 – 2016

Figure 115 Inward migration from other parts of Australia 2011 – 2016



8.3 Established families with children – methodology for need assessment

Methodology for determining additional requirements for townhouse/terrace/villa dwellings for couples with children established families

Methodology and assumptions include:

- Forecast number of additional couple with children households
- It is assumed that some of the additional couple with children demand can be absorbed through current couple-only or lone households downsizing from separate dwellings
- Currently couple with children households occupy 20% of semi-detached dwellings (2 storey or more)
- To maintain this proportion 20% of the 3,455 additional households with children, 691 additional dwellings of this type would be required. However, the representation of this household type is low in this type of dwelling, likely as a result of very low availability of stock.
- To support a doubling of the proportion of couples with children in this type of dwelling, this number is then multiplied by 2.

Table 20 Likely demand for intermediary housing for couple with children

Couples with children projected intermediary dwelling demand	
Total expected growth in couple-only households	3455
20% of 2-storey and above townhouses occupied by couples with children. To maintain this ratio 20% of the forecast couple with children growth. Therefore, the calculation is the number of additional households times 20%.	691
Likely under-representation of couples with children households considering the group and therefore, increasing the amount of stock for that household type	691
Likely minimum demand for intermediary housing typologies – semi-detached/townhouses etc from established families	1,362 dwellings

9 CALD inward migration trends, dwelling type and tenure choice

Overseas migration has been a strong driver of growth in the Ku-ring-gai LGA. However, this is expected to decline over the 2016 – 2036 period with more significant decline from 2031 to 2036. It is important, however, to understand the housing pressures that arise out of overseas immigration and typically the typologies of dwellings that are chosen.

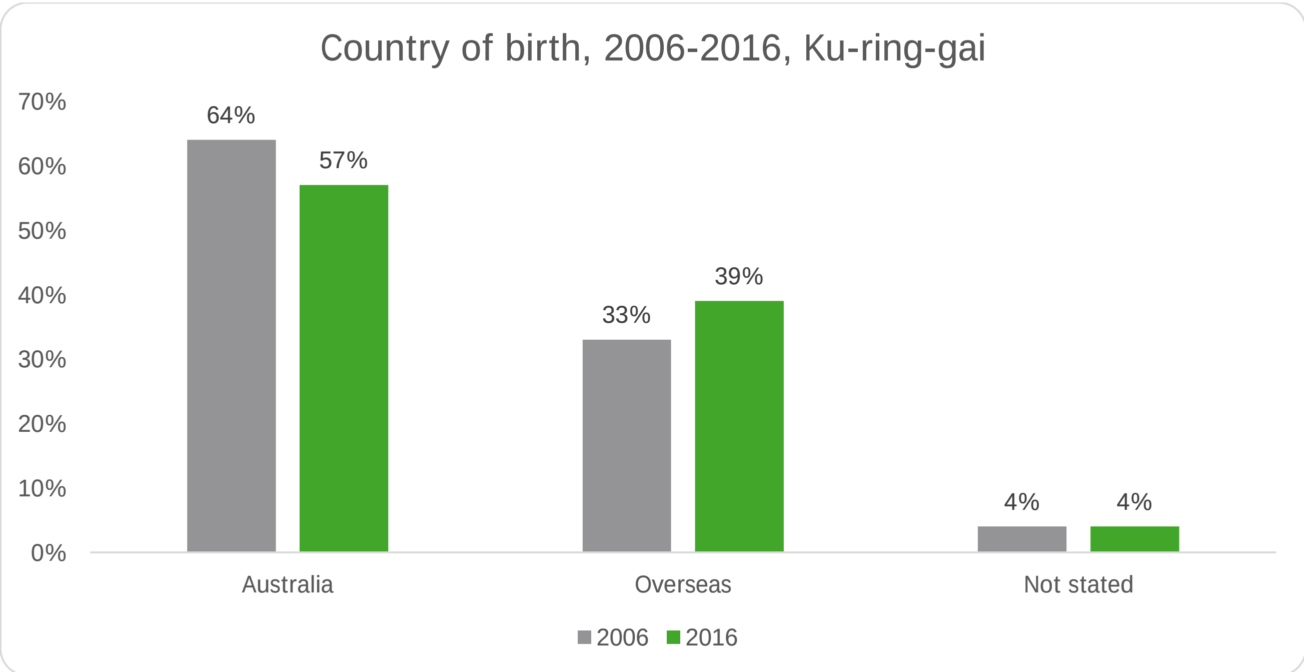
9.1 CALD profile and English proficiency

There has been a 6% rise in people born overseas between 2006 and 2016 in Ku-ring-gai. The highest level of change in the LGA for resident's country of birth was China, South Korea, India, Iran, UK, Malaysia and Hong Kong. See **Figure 117**. Of the languages spoken at home other than English, the highest are Mandarin, Cantonese, Korean, Persian and Hindi. See **Table 21.** The number of people that do not speak English (or do not speak it well) has risen by approximately 2,700 residents between 2006 – 2016.

The vast majority of people born overseas now residing in Ku-ring-gai speak English proficiently. As of 2016, approximately 17% did not speak English or not well. See **Figure 118**. However, low English proficiency does not make a significant impact on the level of housing affordability concerns (those proficient in English at around 33% with unaffordability concerns compared to 38 – 39% with lower levels of English proficiency). These are both much higher than the level of affordability concerns across the LGA. See **Figure 119**.

Understanding if there are locational choices for this group may assist in identifying future housing need, albeit with decreasing demand post 2026 according to population forecasts.

Figure 116 Country of birth 2006-2016



Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Table 21 Country of birth 2006-2016

Country of birth, 2006-2016, Ku-ring-gai				
Country of birth	2006	2016	Change	
	No.	No.	No.	%
China	2,060	8,390	6,330	307.28%
UK	7,122	7,626	504	7.08%
Hong Kong	2,541	2,956	415	16.33%
South Korea	1,399	2,481	1,082	77.34%
India	1,021	2,004	983	96.28%
Malaysia	985	1,429	444	45.08%
Iran	513	1,135	622	121.25%

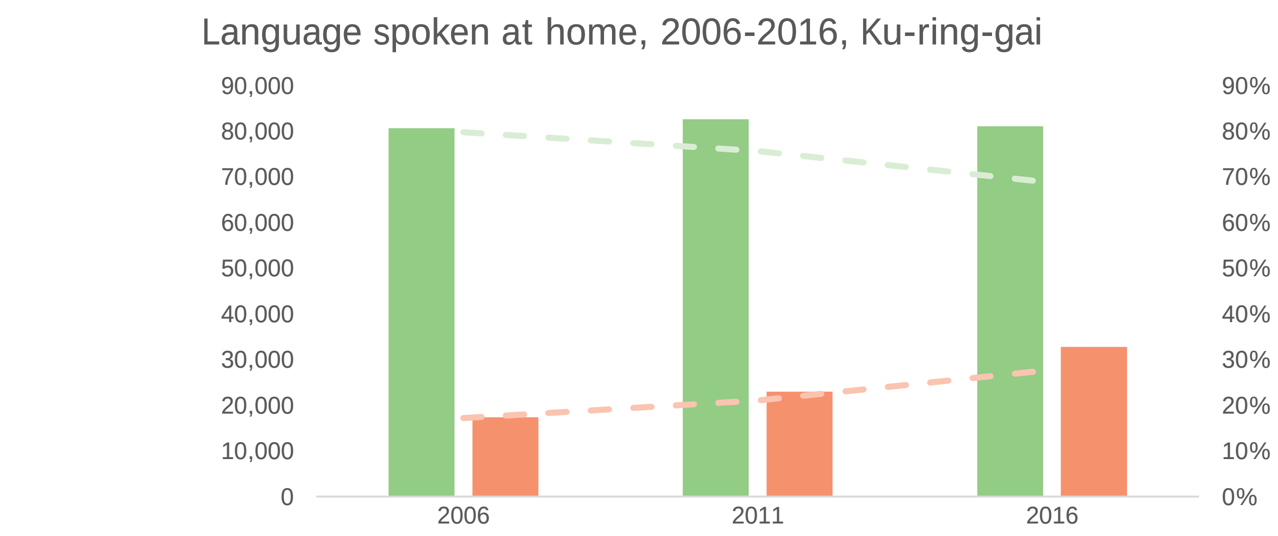
Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Table 22 Language Spoken at home 2016

Language spoken at home, 2016, Ku-ring-gai	
Language spoken at home	Number of residents
Mandarin	10,197
Cantonese	5,914
Korean	2,948
Persian	1,236
Japanese	955
Hindi	857

Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Figure 117 Language spoken at home 2006-2016

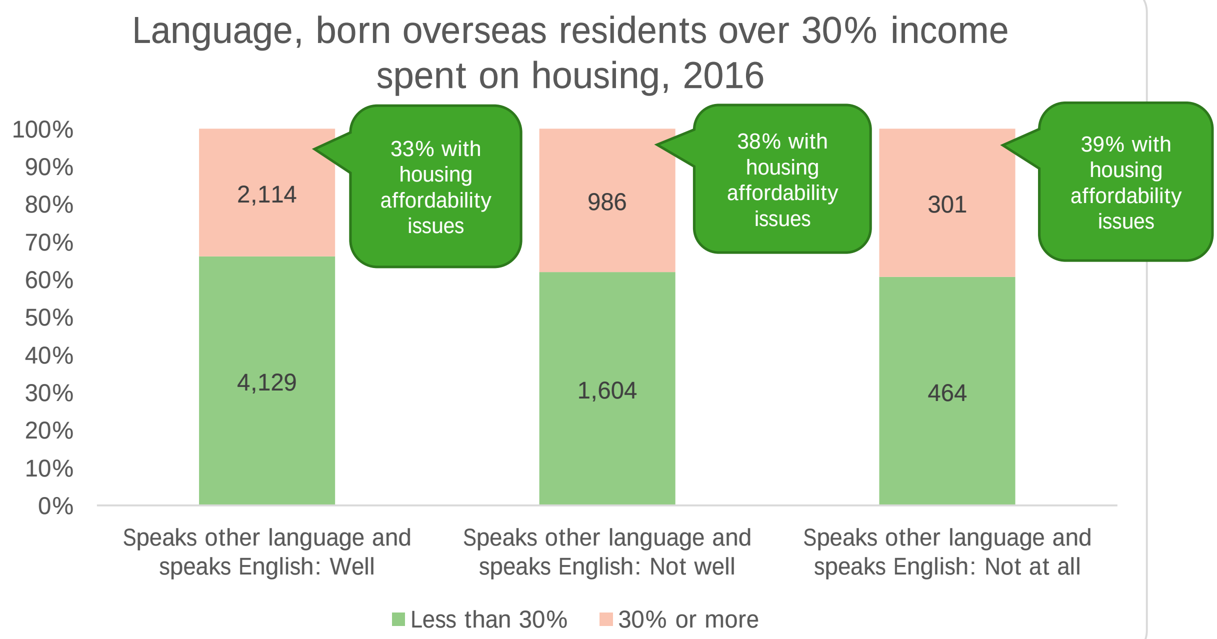


	2006	2011	2016
English only (no.)	80,614	82,608	81,070
Other language (no.)	17,388	22,973	32,752
English only (%)	79.75%	75.58%	68.67%
Other Language (%)	17.20%	21.02%	27.74%

Source: Department of Planning, Industry and Environment – Community Profile Tool (LGA)

It can be seen from **Figure 119** that housing stress is more prevalent in people born overseas worsening with low or no proficiency in English in the LGA (approximately 38%).

Figure 118 Language, born overseas residents with housing affordability concerns



Source: ABS –Customised Data Report, 2016, variables Persons enumerated at home on census night, English proficiency, place of birth, housing costs, 'Ku-ring-gai (A)' (accessed December 2019)

Note: Those not able to determined have been removed from the above graph.

9.2 Inward migration overall – housing choice

Figures 120 to 121 provide an overall visual representation of the different housing choices of people that moved to Ku-ring-gai from overseas between 2011 and 2016. The dominant choice has been for separate dwellings (6,100 people) compared to apartments (3,112 people). Townhouse type dwellings attracted 258 persons.

In comparison, **Figures 122 - 123** visually represents housing locational choice for residents that have migrated to Ku-ring-gai and who have low levels of proficiency in English and are experiencing housing affordability concerns.

There are significantly fewer residents that have moved to separate houses without proficiency in English and experience housing unaffordability.

When compared to mapping of lack of affordability of housing (ABS definition of housing stress), the lack of English proficiency strongly accords with high volumes of apartment living in St Ives, Gordon and Roseville (Boundary Road). The specific Statistical Area 1s that had the highest concentrations are generally dominated by 4 storey or more apartment buildings.

This illustrates that larger-scale apartments are a valuable source of housing for these communities and an adequate supply needs to be maintained. As previously outlined in **Section 3.2**, net migration is forecast to have a declining influence in the LGA between 2016 – 2036.

From an Affordable Housing needs analysis, those CALD residents in significant housing stress (NSW Affordable Housing Ministerial Guidelines definition) are accounted for the in the data at **Section 4.5.1 and in the Affordable Housing needs assessment in Section 14**. However, it is important to note that housing unaffordability for these cohorts generally impacts the more southern parts of the LGA along the train line and St Ives.

These should be key locations to ensure more affordable typologies of housing are delivered and encourage Affordable Housing delivery.

Figure 119 Inward migration from overseas to separate houses 2011 - 2016

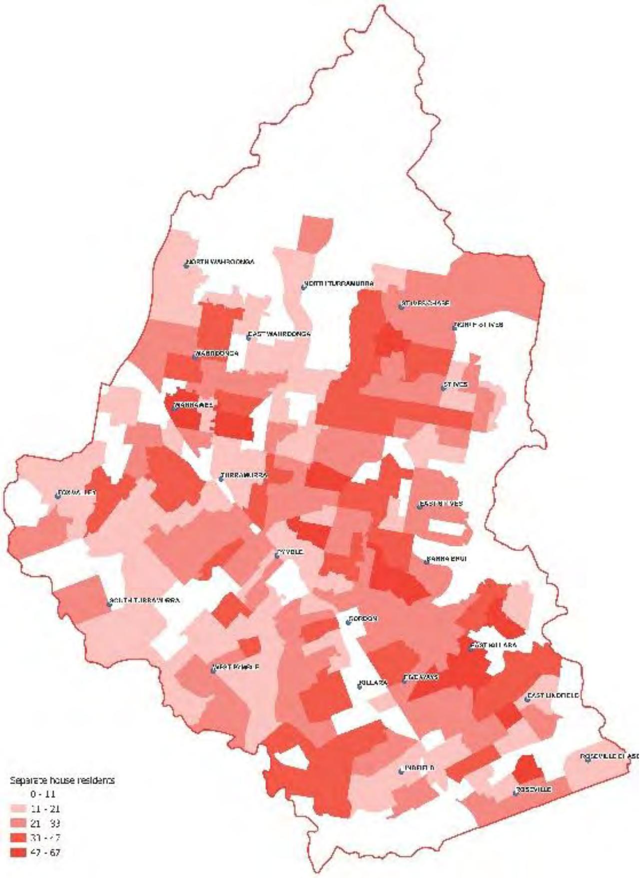


Figure 120 Inward migration from overseas to apartments 2011 - 2016

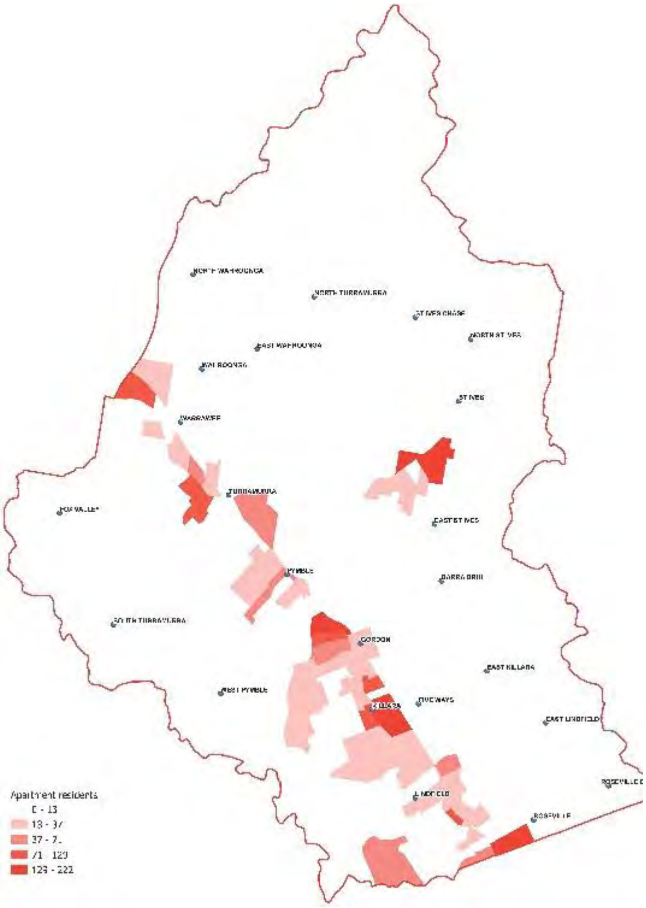


Figure 121 Overseas immigration to separate houses – not does not speak English well or at all and housing more than 30% of income

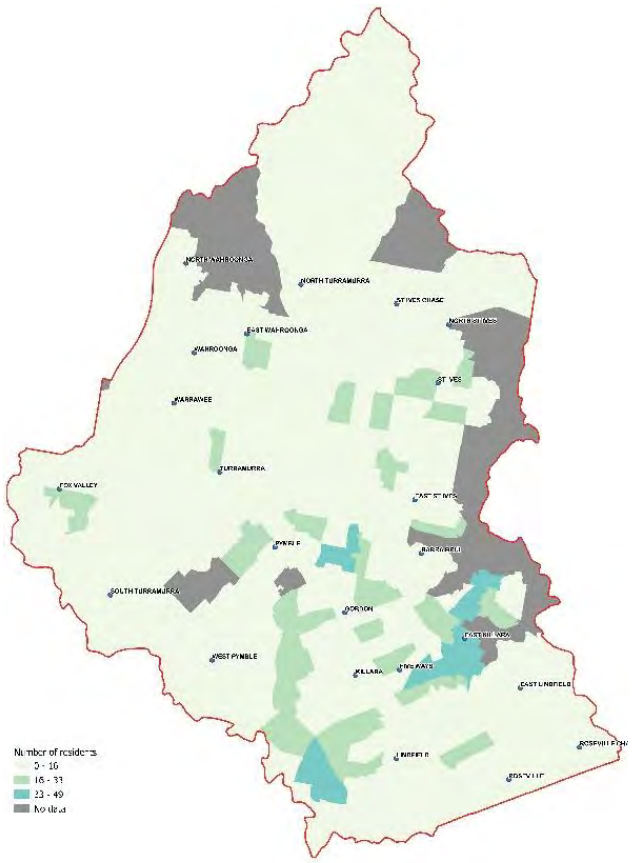
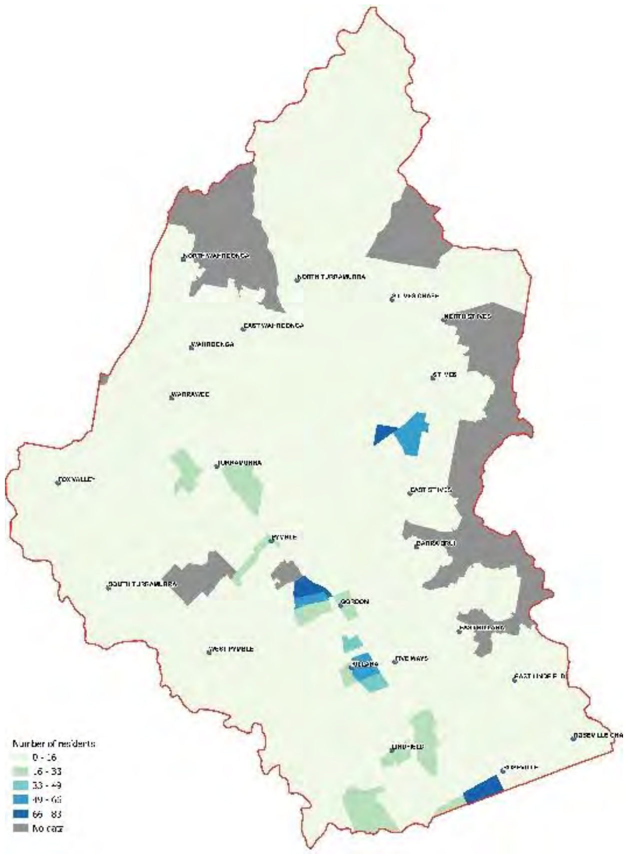


Figure 122 Overseas immigration to apartments – not does not speak English well or at all and housing stress and housing more than 30% of income



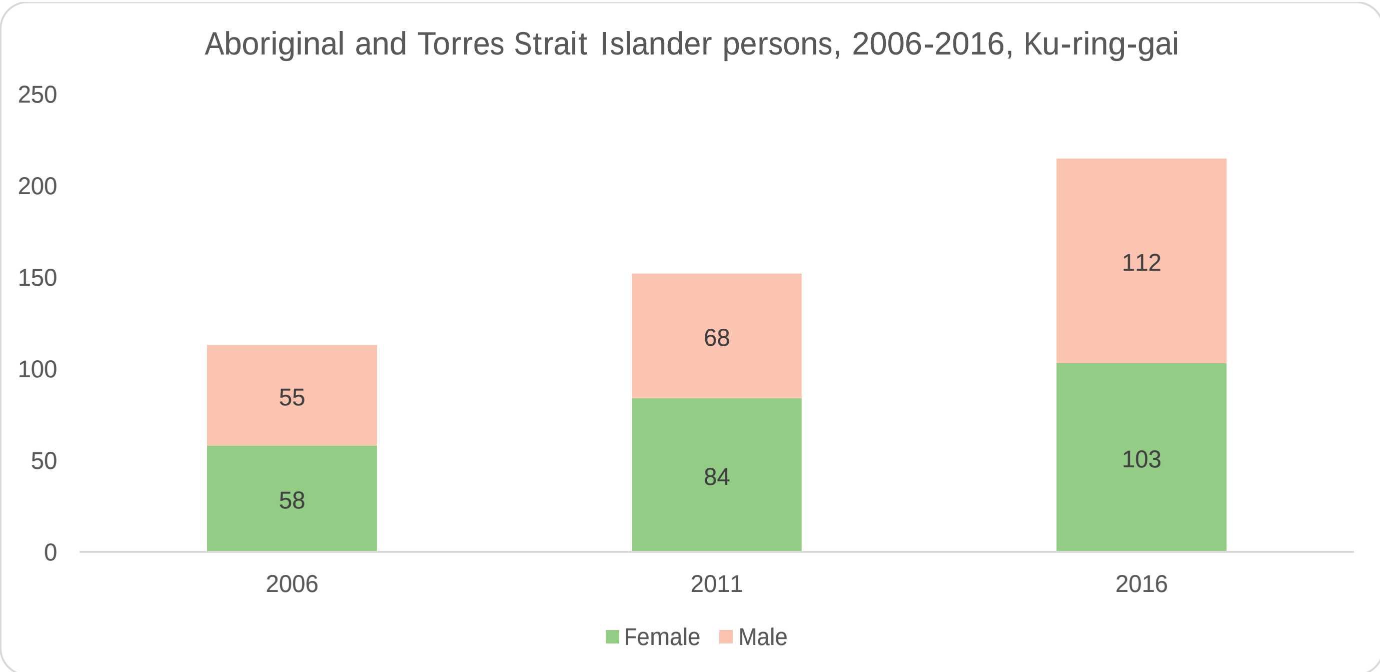
10 Aboriginal and Torres Strait Islander population

The number of people that identify as Aboriginal and Torres Strait Island (ABTSI) people in the Ku-ring-gai LGA has nearly doubled between 2006 and 2016. See **Figure 123**. However, this cohort represented less than 0.2% of the population. The age profile peaks at 15 – 19 years, with other age groups not showing specific patterns. See **Figure 124.**

The median household income of Aboriginal and Torres Strait Islanders as at the 2016 Census was $3,096, substantially more than the overall median household income for the LGA. This is substantially more than the median household income for ABTI households for NSW ($1,214) and Australia ($1,203).

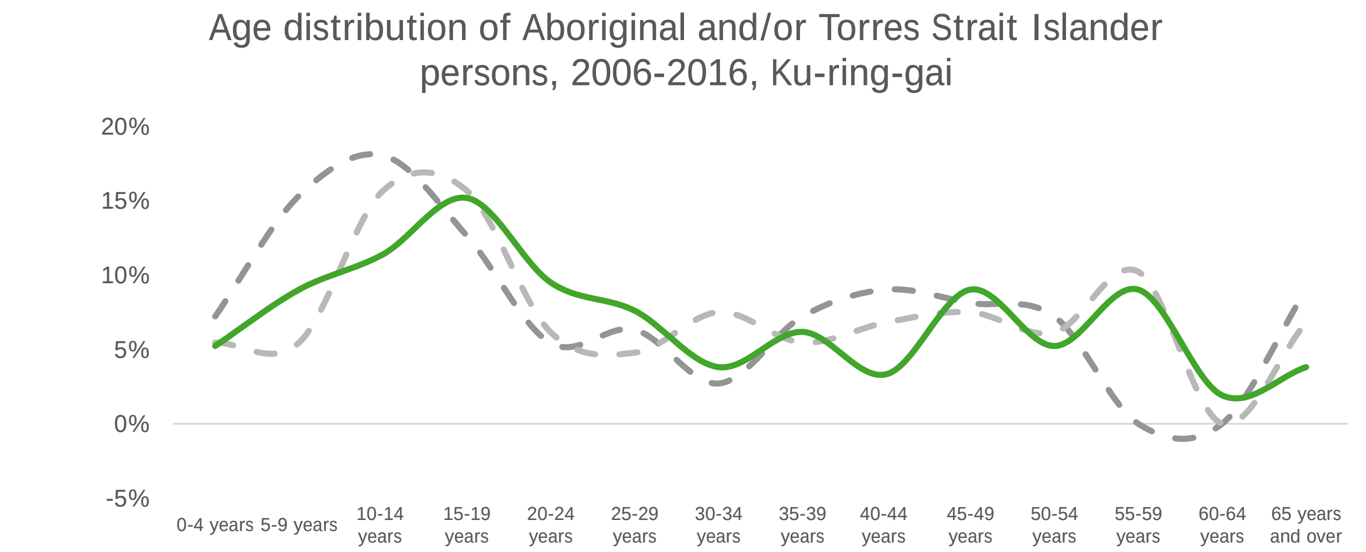
Given this, no specific actions are indicated for this cohort.

Figure 1233 Aboriginal and Torres Strait Islander persons 2016- 2016



Source: ABS – Times Series, 2006, 2011, 2016, Ku-ring-gai LGA

Figure 1244 Age distribution of Aboriginal persons 2006-2016



	0-4 years	5-9 years	10-14 years	15-19 years	20-24 years	25-29 years	30-34 years	35-39 years	40-44 years	45-49 years	50-54 years	55-59 years	60-64 years	65 years and over
2006	7.21%	15.32%	18.02%	12.61%	5.41%	6.31%	2.70%	7.21%	9.01%	8.11%	7.21%	0.00%	0.00%	9.01%
2011	5.44%	5.44%	15.65%	15.65%	6.12%	4.76%	7.48%	5.44%	6.80%	7.48%	6.12%	10.20%	0.00%	6.80%
2016	5.21%	9.00%	11.37%	15.17%	9.48%	7.58%	3.79%	6.16%	3.32%	9.00%	5.21%	9.00%	1.90%	3.79%

Source: ABS – Times Series, 2006, 2011, 2016, Ku-ring-gai LGA

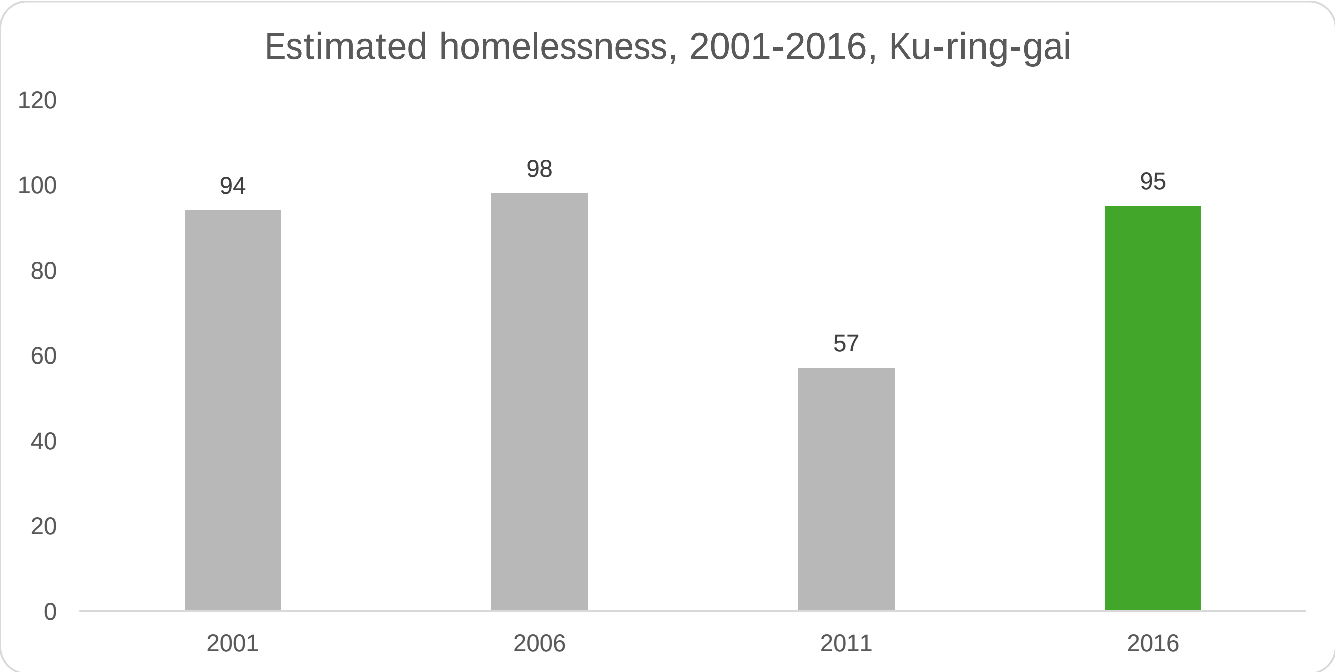
11 Homelessness

Figure 125 provides the outline of homelessness estimates provided by the Australian Bureau of Statistics. There has been a rise in the estimate of homelessness between 2011 and 2016. This may, in part, be a result of a reduction in hostel accommodation from 17 in 2011 to zero in 2016.

While the incidence of homelessness is lower than most areas of the North District (see **Figure 126**), there is a need for some safety-net facilities. Boarding houses are permissible in all relevant residential zones and business zones where residential accommodation is permissible.

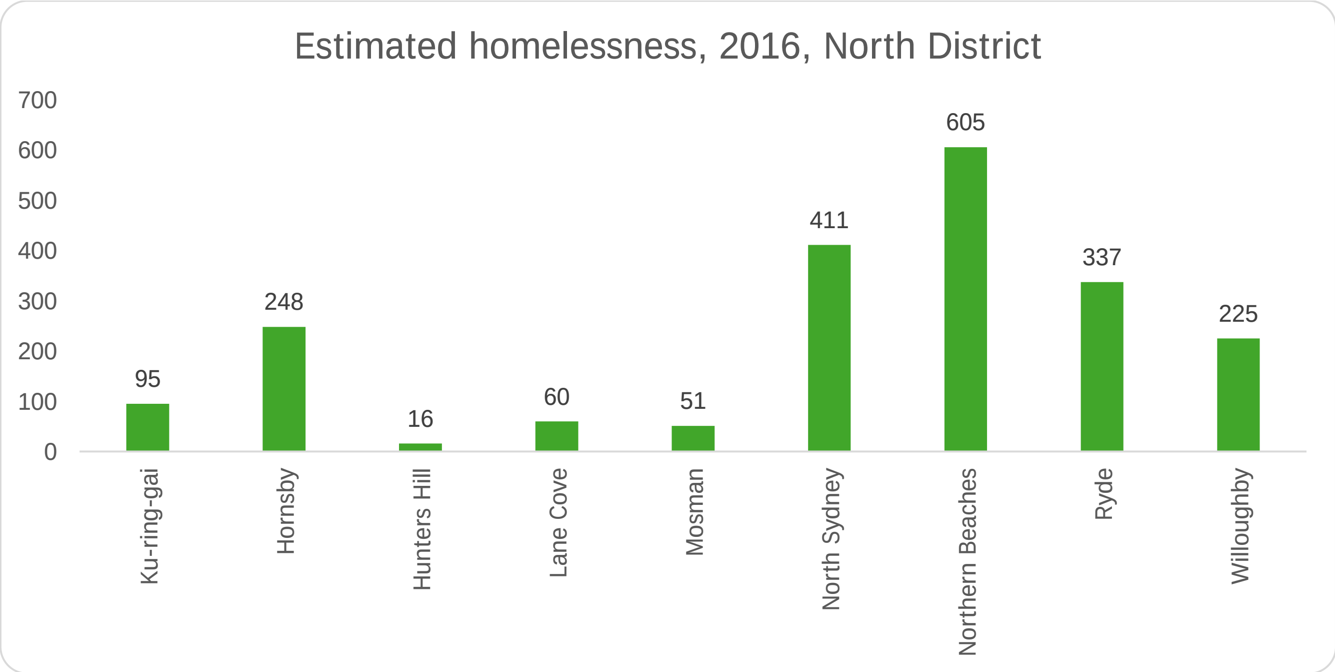
Identification of any zones where other types of residential accommodation are not permissible where boarding houses could locate, may assist in meeting the expected demand for suitable accommodation for those experiencing homelessness. However, the opportunities in Ku-ring-gai are limited. It is recommended that Ku-ring-gai Council advocate for rent control of Boarding Houses, similar to Affordable Housing, should any opportunities be identified.

Figure 1255 Estimated homelessness 2001-2016



Source: ABS – Census of Population and Housing – Estimating homelessness (2016)

Figure 1266 Estimated homelessness North District 2016



Source: ABS – Census of Population and Housing – Estimating homelessness (2016)

12 Need of assistance

12.1 Need of Assistance with Core Activities by dwelling, tenure type and analysis of housing unaffordability

Table 23 provides an outline of residents in need of assistance with core activities as a percentage of residents in each dwelling and tenure type. This is divided into two tables, one being owned-outright tenure type and other tenure types. Where residents have a housing cost (i.e. not owned-outright), the number of residents that are experiencing housing affordability issues is examined.

Table 23 Assistance required owned outright

	Separate house	Semi-detached, row or terrace house, townhouse etc. with one storey	Semi-detached, row or terrace house, townhouse etc. with two or more storeys	Flat or apartment in a one or two storey block	Flat or apartment in a three storey block	Flat or apartment in a four or more storey block	Flat or apartment attached to a house
Has need for assistance with core activities	1428	36	72	86	85	96	0
Total residents	34107	273	1300	997	856	2256	0
	4%	13%	6%	9%	10%	4%	0%

The largest number of residents that need assistance with core activities are in semi-detached (13%) and apartments 3-storeys and above (9-10%) with owned-outright tenure.

The owned-with-mortgage separate house category featured the second largest group of residents that required assistance with core activities. Only 2% of the resident population that do not have housing affordability concerns require assistance. The number of those that require assistance and have housing affordability concerns is no greater at 2%.

No other tenure or dwelling type has greater than 4% of residents in need of assistance with core activities, with the exception of flats and apartments that are of "other" tenure types (7%). No residents in the "other" tenure type have housing affordability concerns.

As the ageing population may be attracted to apartment living in the future (as outlined in **Section 5**), there will be a need to ensure that all new apartments are adaptable for those requiring assistance with core activities (Sliver Liveable Standard). Maintaining the Platinum Standard in the DCP is recommended to ensure that those with mobility issues can be accommodated.

Table 24 In need of assistance and housing affordability issues

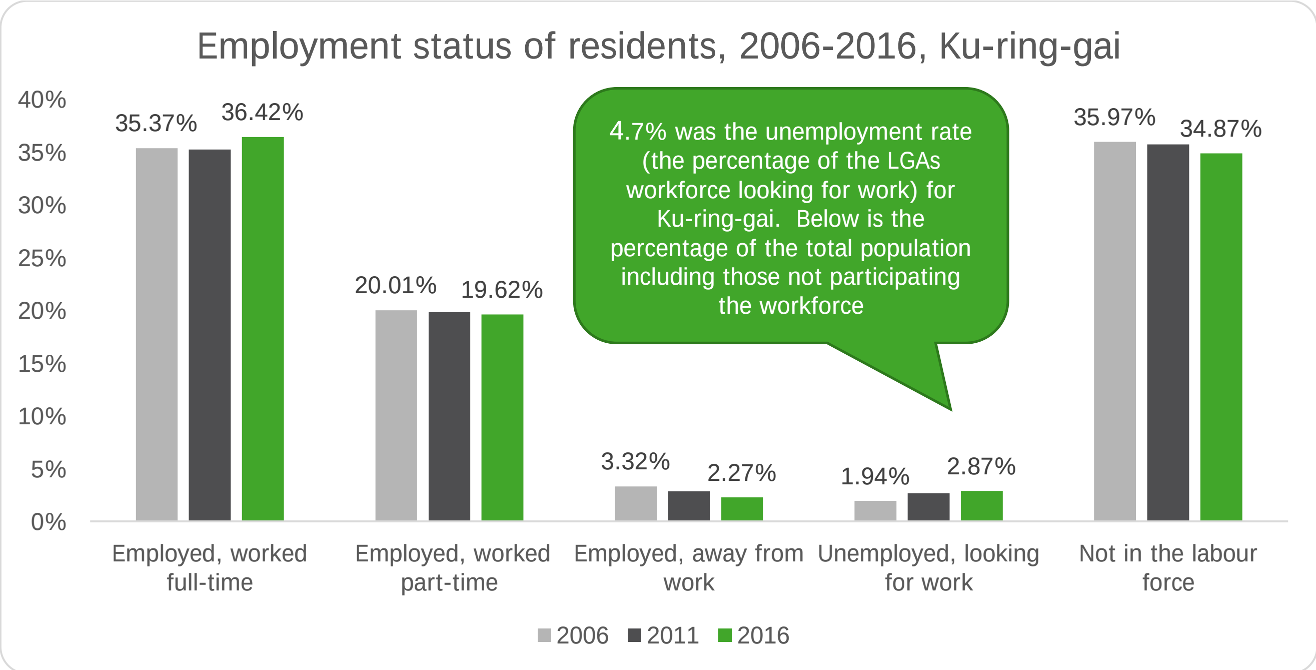
Dwelling Structure	Core Activity Need for Assistance	Owned with a mortgage			Rented			Other tenure type			Total		
		Less than 30%	30% or more	Total	Less than 30%	30% or more	Total	Less than 30%	30% or more	Total	Less than 30%	30% or more	Total
Separate house	Needs assistance with core activities	445	145	681	54	94	178	1,421	0	1,421	1,922	238	2,311
Separate house	Total	28,828	8,676	43,711	4,907	3,537	9,704	33,618	0	33,618	67,352	12,211	88,083
Percentage of separate dwellings		2%	2%	2%	1%	3%	2%	4%	0%	4%	3%	2%	3%
Semi-detached, row or terrace house, townhouse etc. with one storey	Needs assistance with core activities	0	0	0	0	0	5	43	0	43	44	0	55
Semi-detached, row or terrace house, townhouse etc. with two or more storeys	Total	529	161	775	326	227	620	1,284	0	1,284	2,139	391	2,714
Percentage of semi-detached		0%	0%	0%	0%	0%	1%	3%	0%	3%	2%	0%	2%
Flat or apartment in a one or two storey block	Needs assistance with core activities	3	0	10	5	19	24	113	0	113	121	20	161
Flat or apartment in a one or two storey block	Total	359	92	495	464	325	869	1,214	0	1,214	2,040	414	2,646
Flat or apartment in a three storey block	Needs assistance with core activities	3	0	9	17	12	31	90	0	90	108	16	132
Flat or apartment in a three storey block	Total	584	205	867	680	510	1,266	921	0	921	2,180	709	3,122
Flat or apartment in a four or more storey block	Needs assistance with core activities	25	20	52	29	48	90	115	0	115	166	68	262
Flat or apartment in a four or more storey block	Total	2,530	1,060	4,002	3,152	2,286	5,854	2,357	0	2,357	8,037	3,349	12,356
Percentages of all flats and apartments		1%	1%	1%	1%	3%	2%	7%	0%	7%	3%	2%	3%
Other dwelling structure	Needs assistance with core activities	0	0	0	0	0	0	0	0	0	0	0	0
Other dwelling structure	Total	12	4	14	12	17	34	11	0	11	32	21	65
Percentage of other dwellings		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

13 Employment and key workers in local industries

13.1.1 Unemployment rate, industries of employment of residents and key local industries

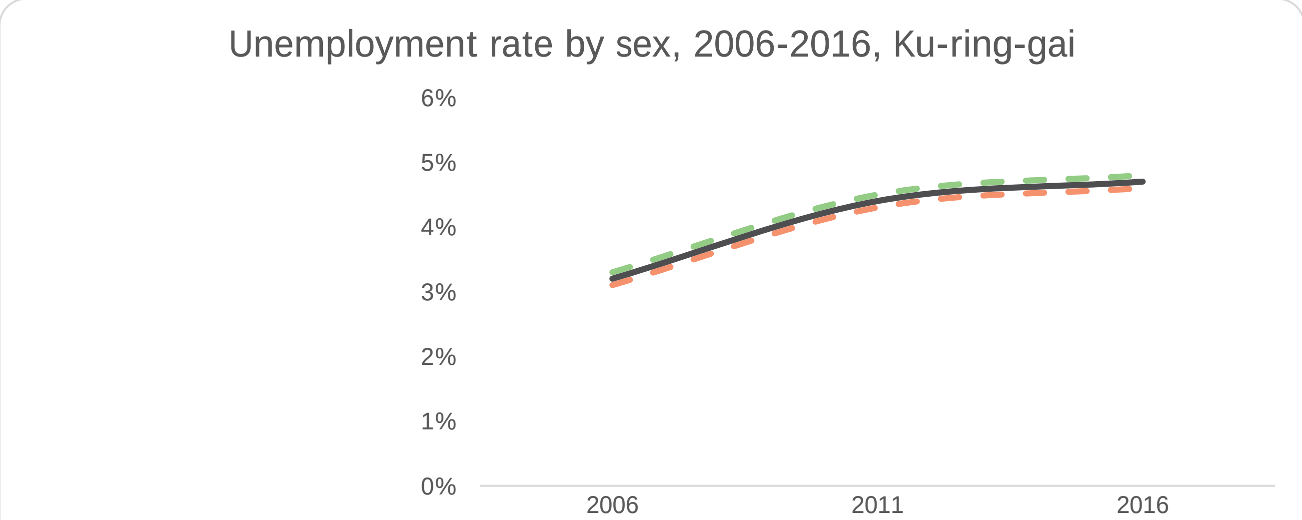
As of 2016, the LGA had a low employment rate of 4.7% compared to 6.3% for NSW and 6.9% for Australia. There is little difference in the employment rate between males and females (4.8% and 4.6% respectively). See **Figure 129**. Low unemployment rates can make staffing of services such as retail and other lower-paid key worker jobs, such as aged care, more difficult. There has been a decline in the number of people participating in the labour force between 2006 – 2016. This is likely due to the ageing of the population.

Figure 127 Employment status of residents 2006-2016



Source: ABS – Time Series Profile (2016)

Figure 128 Unemployment rate by sex 2006-2016



	2006	2011	2016
Unemployment rate male (%)	3.30%	4.50%	4.80%
Unemployment rate female (%)	3.10%	4.30%	4.60%
Unemployment rate all residents (%)	3.20%	4.40%	4.70%

Source: ABS – Time Series Profile (2016)

Figure 130 and Table 125 outlines the industries that local residents are employed in as of 2016. The industries that have the highest percentage of the resident workforce are generally professions such as Professional and Technical Services and Finance and Insurance. The key worker industries of Health Care and Social Assistance and Education and Training are also some of the highest represented in the LGAs labour force. They have exhibited significant growth between 2006 – 2016 (25 and 22% growth respective respectively). There are higher representations of workers in the Health Care and Social Assistance and Education industries than the North District and Greater Sydney. Another key worker industry is Public Administration and Safety, which has shown a growth rate of 33.9% in the LGA.

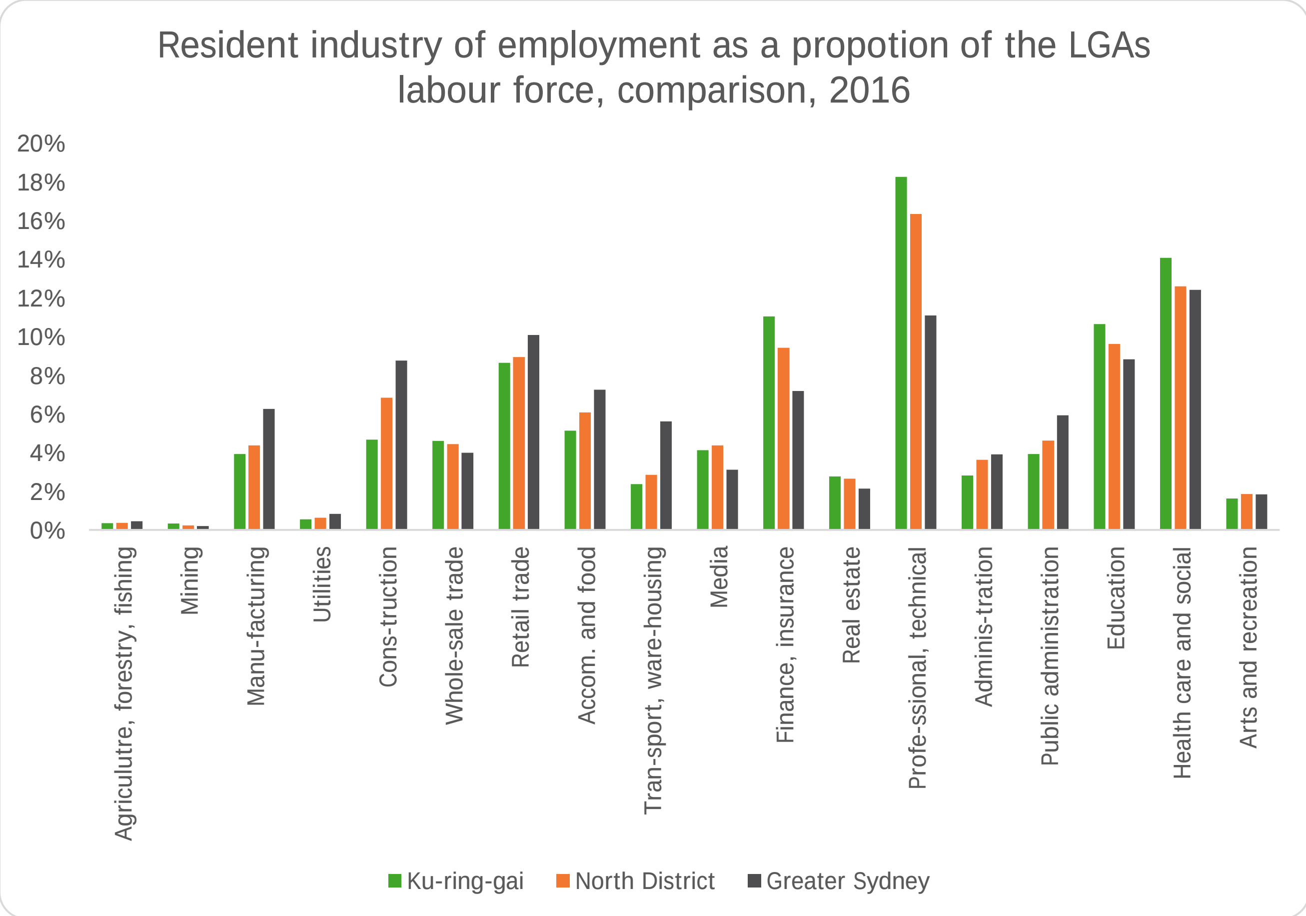
Two key factors drive the high representation of people in the Healthcare and Social Assistance industry:

» The SAN Hospital – the largest single employer in the LGA

» The high level of aged care service requirements of the area.

Education and Training employment is driven by the multiple private and public education facilities in the local area.

Figure 129 Resident industry employment as a proportion of LGA's labour force comparison 2016



Source: Department of Planning, Industry and Environment Community Profile Tool (LGA)

Table 25 Local resident employment profile 2006-2016

Local Resident Employment Profile 2006-2016								
Industry	2006		2011		2016		2006 to 2016	
	No. of workers	% of work force	No. of workers	% of work force	No. of workers	% of work force	No. of workers	% of growth
Agriculture, Forestry & Fishing	176	0.2%	139	0.1%	178	0.2%	2	1.1%
Mining	113	0.1%	152	0.1%	170	0.1%	57	50.4%
Manufacturing	2,487	2.5%	2,495	2.3%	2,008	1.7%	-479	-19.3%
Electricity, Gas, Water & Waste Services	242	0.2%	227	0.2%	286	0.2%	44	18.2%
Construction	1,909	1.9%	2,057	1.9%	2,392	2.0%	483	25.3%
Wholesale Trade	2,828	2.8%	3,055	2.8%	2,357	2.0%	-471	-16.7%
Retail Trade	4,425	4.4%	4,293	3.9%	4,425	3.8%	0	0.0%
Accommodation & Food Services	2,167	2.1%	2,250	2.1%	2,632	2.2%	465	21.5%
Transport, Postal & Warehousing	1,044	1.0%	1,036	1.0%	1,214	1.0%	170	16.3%
Information Media & Telecommunications	1,710	1.7%	1,928	1.8%	2,120	1.8%	410	24.0%

Financial & Insurance Services	4,606	4.6%	5,023	4.6%	5,653	4.8%	1,047	22.7%
Rental, Hiring and Real Estate Services	1,175	1.2%	1,176	1.1%	1,424	1.2%	249	21.2%
Professional, Scientific and Technical Services	8,117	8.0%	8,902	8.1%	9,341	7.9%	1,224	15.1%
Administrative & Support Services	1,408	1.4%	1,427	1.3%	1,451	1.2%	43	3.1%
Public Administration & Safety	1,498	1.5%	1,694	1.6%	2,006	1.7%	508	33.9%
Education & Training	4,451	4.4%	4,886	4.5%	5,449	4.6%	998	22.4%
Health Care & Social Assistance	5,738	5.7%	6,430	5.9%	7,198	6.1%	1,460	25.4%
Arts & Recreation Services	606	0.6%	703	0.6%	836	0.7%	230	38.0%
Other Services	1,230	1.2%	1,323	1.2%	1,500	1.3%	270	22.0%
Inadequately described / not stated	1,148	1.1%	1,110	1.0%	2,274	1.9%	1,126	98.1%
Not applicable (including not in the labour force)	54,011	53.4%	58,992	54.0%	63,133	53.5%	9,122	16.9%
Total	**101,089**		**109,298**		**118,047**		**16,958**	**16.8%**

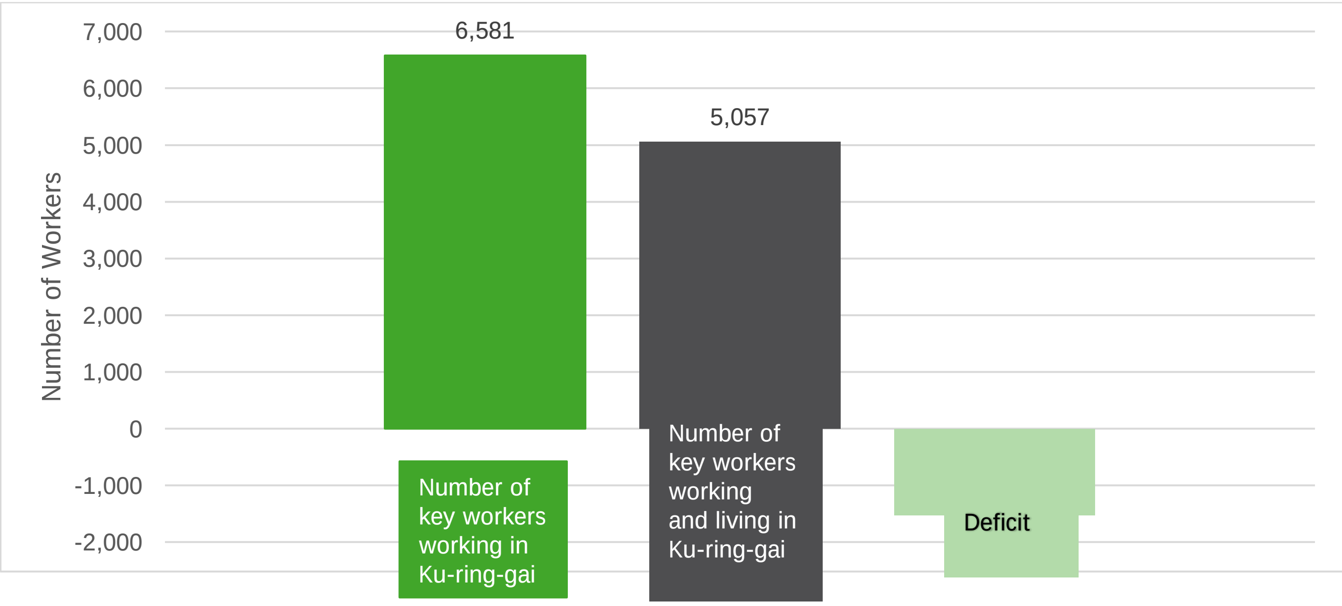
Source: ABS – Table Builder Basic, 2016, variables INDP 'Place of UR Ku-ring-gai (A)' (Accessed June 2019)

13.2 Key worker shortfall in Ku-ring-gai

An assessment has been done of the shortfall of key workers in the Healthcare and Social Assistance, Education and Training and Public Administration and Safety sectors.

This is outlined in Figure 131. However, further investigation into the number of low and moderately paid workers travel to the LGA has been undertaken.

Figure 130 Number of workers shortfall in key industries



Approximately 70% of employees in key worker industries of Healthcare and Social Assistance, Education and Training and Public Administration and Safety in the LGA, live outside Ku-ring-gai. See **Table 26.**

There is a much lower level of employment self-containment in the LGA in lower paid workers. Analysis of the lowest paid (less than $52,000 per year) and moderately paid workers (up to$104,000 per annum) is provided below in **Table 26.**

Approximately 2,200 low paid workers work in the LGA but live outside the North District and travel considerable distances to key worker positions in the LGA. Approximately 5,000 low and moderately paid key workers live outside the North District.

The low paid workers are highly likely be eligible for Affordable Housing as defined by NSW Affordable Housing Ministerial Guidelines, while moderate paid workers depending on household circumstances, might also be eligible.

This has been incorporated into the Affordable Housing needs assessment in **Section 14.**

Table 26 Local workers working in the LGA percentage and numbers of low and moderately paid workers that come from outside the North District

Industry	Percentage of key workers that work and live in the LGA	Number of workers from outside the North District earning less than $52,000 per annum	Number of workers from outside the North District earning less than $104,000 per annum
Healthcare and Social Assistance	32%	838	2,645
Education and Training	38%	1184	2,399
Public Administration and Safety	26%	191	569
Total		2,213	5,613

Source: ABS –Customised Data Report, 2016, 2016 Census: T5, Employed persons aged 15 and over enumerated at home on Census night, by Individual Income and Industry, by Place of Work (Ku-ring-gai LGA) and Place of Usual Residence

14 Affordable housing need

Summary and key implications for the Housing Needs Study

» At a minimum, it is estimated that up to 4,000 Affordable Housing dwellings could be required by residents in the LGA and key workers that come into the LGA that are on low and very low incomes. This is comprised of people in significant rental stress living in the LGA as defined by the NSW Affordable Housing Ministerial Guidelines (not just experiencing affordability issues), Ku-ring-gai key workers that travel to the LGA from outside the North District and earn less than $52,000 per annum, and the estimated number of homeless people in the LGA.

» It is estimated that up to 8,000 Affordable Housing dwellings could be required if key workers travelling to the LGA earning up to $104,000 per annum are added (upper limit in the NSW Affordable Housing Ministerial Guidelines for moderate income earners) and where people over 55 in significant mortgage stress are added.

» Even with the delivery of maximum Affordable Housing identified under the North District (10-15% of new dwellings) this would not meet potential demand.

» Therefore, maximising the delivery of Affordable Housing should be undertaken in the Housing Strategy, where feasible, and any other available mechanism should be explored e.g. onsite affordable housing for key workers.

Methodology for assessing those likely eligible for Affordable Housing as per the Ministerial Directions for Affordable Housing

The methodology for assessing the likely minimum numbers eligible for Affordable Housing as per the Ministerial Directions for Affordable Housing is to add:

» The number of people in the LGA in rental housing stress as defined by the Ministerial Guidelines – see **Section 4.5.1**

» Key workers living outside the North District in the two largest employer industries in Ku-ring-gai being Healthcare and Social Assistance and Education and Training as well as Public Administration and Safety. Those earning less than $52,000 per annum are used to determine those key workers highly likely to be eligibility for Affordable Housing and who do not live in the North District. These calculations are outlined in **Section 13** of this report.

» Add the estimated number of homeless people as **per Section 11** of this report.

Notes: CALD community members and key workers that reside within Ku-ring-gai in significant housing stress are counted under the overall housing stress calculation that accords with the Ministerial Guidelines.

For the estimated maximum number those eligible for Affordable Housing, the following is added to the above:

» Over 55s with significant mortgage affordability concerns as per **Section 5.1.3**

Note: younger people have been removed from this as they are more likely to recover from the mortgage stress, and may be able to move or choose other tenure types

» Key workers (Healthcare & Social Assistance, Education and Training and Public Administration & Safety Industry categories) that live in other LGAs outside the North District with incomes between $52,000 and $104,000 indicating likely eligibility under the NSW Affordable Housing Ministerial Guidelines.

Approximately 50% of all key workers that do not reside in Ku-ring-gai come from locations outside the North District (see **Table 27**). The most impacted industry is Healthcare and Social Assistance with 1,250 key workers earning under $52,000 per annum travelling to Ku-ring-gai from outside the North District.

An estimate of between 4,000 and 8,000 dwellings could be utilised to support people in housing stress in the LGA or key workers living outside the North District.

Table 27 Minimum and maximum affordable housing potential demand

Ku-ring-gai households in Housing Stress as defined by the NSW Affordable Housing Ministerial Guidelines			
Households in rental housing stress - refer to **Section 4.5.1** (1,049 of these are over 55s in housing rental stress and are unlikely to financially recover)			2147
Households in mortgage stress (over 55s) – refer to **Section 5.1.5**			2,972
Ku-ring-gai key workers that live outside the LGA likely to qualify for Affordable Housing			
Key Workers – refer to **Section 13**	Income less than $52,000 per annum	Income from $52,000 to $104,000 per annum	**Total**
Education & Training – live outside the LGA	1114	1443	2557
Education & Training – Place of residence outside the North District	475	619	1094
Healthcare & Social Assistance – live outside the LGA	2248	1539	3787
Healthcare & Social Assistance – Place of residence outside the North District	1250	835	2040
Public Administration & Safety – live outside the LGA	54	245	299
Public Administration & Safety – Place of residence outside the North District	27	154	181
Total live outside the LGA	3416	3227	
Total live outside the North District	1782	1608	
Homelessness			
Estimate number of homeless people – Refer to **Section 11**			95
Estimate of households eligible for Affordable Housing			
Estimated minimum number eligible for Affordable Housing including those in rental stress in the LGA, key workers living outside the North District earning less than $52,000 and estimate of homeless			4,082
Estimated maximum eligible for Affordable Housing includes those listed as eligible above plus those in mortgage stress in LGA over 55s and key workers living outside the North District earning less than $104,000 per annum			7,843

Currently there are approximately 232 dwellings or other forms of accommodation that could be classed as affordable, including nurse's quarters, social housing and affordable housing - see **Table 28.**

Therefore, it is estimated that there is a potential minimum demand for 17 times the current level of affordable accommodation in the LGA which could be utilised by those in rental stress (not mortgage stress), lowest paid key workers and homeless people.

Affordable Housing Mechanisms

While it is not realistic to expect this level of formal affordable housing delivery, maximising delivery through inclusionary zoning through SEPP 70 would be highly recommended.

Other mechanisms to aid delivery of affordable housing should also be considered including the following potential mechanisms:

» bonus floorspace for key worker accommodation/affordable units in seniors living development or aged care facilities;

» build-to-rent models that may deliver lower levels of overall floorspace than apartments under SEPP65 and innovative living arrangements.

Table 28 Current estimated number of forms of affordable housing

Current Affordable Housing or Social Housing or non-private dwelling that may be affordable	
Social Housing	29
Nurse's Quarters	148
Staff Quarters	13
Hostel for homeless, night shelter, refuge	0
Other welfare institution	42
Total	**232**

15 Estimate of dwelling requirements 2016 – 2036

Summary of estimated dwelling requirements

- It is estimated that 10,704 market dwellings are likely required to meet the key household types and age profiles.
- The likely optimal breakdown of typologies is 54% apartments and 46% medium density dwellings such as townhouses, dual occupancy and terraces. The Housing Needs Study does not assess feasibility of particular housing typologies at particular locations. As a result, the mix of housing typologies may change.
- The likely optimum breakdown of apartments by bedroom is 28% one-bedroom, 64% two-bedroom and 9% 3-bedroom.
- 387 extra aged care places are likely to be required to accommodate the 15% increase in over 65s forecast in the LGA, particularly considering the substantial expected increase in the over 80s considered to be in the frail category.
- It has been estimated that approximately 4,000 Affordable Housing dwellings could be required for those that would be eligible for affordable housing under the NSW Affordable Housing Ministerial Guidelines within the LGA, including those in severe rental stress, homeless people and key workers travelling significant distances to the LGA who earn under $52,000 per annum. It should be noted that moderate income workers (up to $104,000 per annum) would also be eligible. It is not realistic to deliver this amount of Affordable Housing but all mechanisms should be utilised to maximise delivery where feasible.

Dwelling typology breakdown

Table 29 provides an overall assessment of dwelling requirements based on current trends and forecast demographics for the Ku-ring-gai LGA.

Table 29 Market housing estimated requirements by typology and demographic

<table>
<tr><th>Housing need by typology by demographic</th><th>Number</th><th>Percentage of total by typology</th><th>Total</th></tr>
<tr><td>Apartments (young adult/beginning families)</td><td>909</td><td rowspan="3">54%</td><td rowspan="3">5,733</td></tr>
<tr><td>Apartments (ageing population)</td><td>3,820</td></tr>
<tr><td>Apartments (one parent)</td><td>1,004</td></tr>
<tr><td>Semi-detached/terrace/villa/dual occupancy (ageing population)</td><td>3,609</td><td rowspan="2">46%</td><td rowspan="2">4,971</td></tr>
<tr><td>Semi-detached/terrace/villa/dual occupancy (couples with children)</td><td>1,362</td></tr>
<tr><td colspan="3">Note: The Housing Needs Study does not assess feasibility of particular housing typologies at particular locations.</td><td>10,704</td></tr>
</table>

The breakdown of apartment housing and medium density typologies such as townhouses/terraces/dual occupancy of bedrooms and the rationale for each demographic segment is provided below.

Table 30   Breakdown of typologies by bedroom and rationale

Typology/ demographic	Bedroom breakdown	Rationale	One bed	Two bed	Three bed	Four bed
Apartments (young adult/beginning families)	» 20% 1 bedroom » 80% 2 bedroom or above	A significant proportion of apartments 4 storey and above have families with children aged 0-4 years living in them, indicating high occupancy of beginner families. There is also a growing number of young adult group households living in apartments. There are very few lone person young adult households peaking at 135 lone person households in the 30 to 34 year age bracket.	182	727		
Apartments (ageing population)	» 33% 1 bedroom » 66% 2 bedroom or above	48% of apartment dwellings occupied by couple only households are 2-bedroom. 52% of apartments occupied by lone person households are 2-bedroom. However, 14% and 23% (respectively) of 1-bedroom apartments are occupied by these household types. This would indicate a potential undersupply of 1-bedroom stock (currently 13.71% of apartments 4-storey and above). The application of a third 1-bedroom and two-third 2-bedroom split would assist in rectifying this imbalance.	1273	2547		
Apartments (one parent)	» 50% 2-bedroom » 50% 3 bedrooms	49% of one parent households are currently 2-person households (parent and child). A further 34% is 3 person. It is expected that more lone person household (likely larger households in separate dwellings) will downsize in the future.			502	502
Semi-detached/terrace/villa/dual occupancy (ageing population)	» 2 storey and 3 bedroom likely feasible and therefore, 100%.	Likely market preference for 1-storey but unlikely feasible. 3 bedroom minimum likely to be developed to cater for market demand.			3609	
Semi-detached/terrace/villa/ dual occupancy (couples with children)	2 - 3 storey and 3 - 4 bedroom likely demand	Likely market preference for 4-bedroom				1362

Typology/ demographic	Bedroom breakdown	Rationale	One bed	Two bed	Three bed	Four bed
Breakdown of apartments			**25%**	**66%**	**9%**	
Breakdown of Semi-detached/terrace/villa/ dual occupancy					**83%**	**27%**

16 Conclusion and recommended actions

The following provides a summary of the housing need as outlined in this Housing Needs Study.

16.1 Market housing need

Apartment dwellings

The following provides a summary of the housing need for apartment stock and the key factors that have informed the housing need calculation.

Summary of key findings – apartment stock

- There has been a 600% growth in the proportion of people over 50 occupying apartments (4-storey and above) between 2006 – 2016, albeit from a low base
- Housing affordability issues appear to be increasingly prominent in the older population particularly at the younger end of the cohort prompting an escalation of downsizing
- ***To support the ageing population, the preliminary findings of the Housing Needs Study found 3,820 additional apartments would be required***
- There is a very low proportion of young adults in Ku-ring-gai compared to the North District and Greater Sydney. There has been growth in the young adult population in the LGA between 2006 – 2016 (40%+), likely driven by the availability of apartments (4-storey and above). It also found that this form of dwelling is an important source of housing for young starting out families with 0-4 year olds also represented in this typology of housing stock.
- The Housing Needs Study has found that the production of apartment dwellings in Ku-ring-gai has likely had a stabilising effect on rents compared to other LGAs in the North District. This is may have contributed to growth in young adults living in the LGA.
- ***To continue to support the proportion of young adults in Ku-ring-gai - that currently has very low representations compared to the North District and Greater Sydney - the preliminary findings of the Housing Needs Study found that 900 – 1000 additional apartments for this cohort would be required. This will also support rental and purchase opportunity.***
- There is a forecast rise in one parent households. 2006 – 2016 data shows a decline in this household type living in single dwellings and a rise in apartment living by these families. Housing unaffordability is shown to be more prevalent for these families.
- ***To support one parent families, the Housing Needs Study suggested approximately 1,000 additional apartments are required for this household type.***

Townhouse/terrace/villa dwellings

The following provides a summary of the housing need for townhouse/terrace/villa stock and the key factors that have informed the housing need calculation.

Summary of findings – townhouse/terrace/villa typologies

There is a very low percentage of medium density housing stock in the LGA compared to the North District and Greater Sydney (4% of housing stock in the Ku-ring-gai LGA), which makes trends more difficult to determine. However, key conclusions are:

- There is a likely need for semi-detached/townhouse/dual occupancies as an intermediary type of housing for couples with children. Couples with children are forecast to grow by 3,455 households in Ku-ring-gai between 2016 – 2036, a similar increase as the 2006 – 2016 period. Between 2006 – 2016, despite the growth in this household type, only approximately 200 additional detached single dwellings were being occupied by that household type. Therefore, other smaller forms of dwellings are becoming increasingly important.
- In 2016, 20% of semi-detached 2 storey dwellings were occupied by couples with children but occupancy of this type of dwelling is dominated by older age groups. To maintain the proportion of household representation, approximately 690 additional dwellings of this type would be required. However, due to the low availability of stock, this household type is likely under-represented and further stock should be provided.
- ***The Housing Needs Study recommends a target of double the number of semi-detached/terrace/townhouse/dual occupancies be set to assist with availability of appropriate dwellings for households with children (1400 + dwellings of this type to support this cohort)***
- Older persons are strongly represented in occupancy of townhouse/terrace/villa typologies, indicating a preference for this type of stock.
- Downsizing rates across Greater Sydney are generally 35 - 45% or more in Greater Sydney, premised on the right kind of dwellings being available. A more conservative 37% rates was used for Ku-ring-gai, with an assumption that up to 20% would downsize to apartments due to affordability concerns.

With the desired stock available, the preliminary findings of the Housing Needs Study, suggest an additional 15% of over 55 households may downsize if desired stock were available. 3,600 of townhouses/terraces/dual occupancies would be required to fulfil this market gap. It is a recommendation that this is tested with the community.

16.2 Non-market housing demand

Demand in aged care

While the health of older Australians is improving based on life expectancy data[17], there is expected to be a significant rise in the size of the over 80s age group in the Ku-ring-gai LGA by 2036. Therefore, improvements in health and independence of older residents may be offset by the higher volume of residents in the frail category.

The Housing Needs Study has used a direct correlation approach to assess the need for additional aged care services. As at 2016, 4.5% of the over 65-years population was in aged care services. This percentage has been applied to the forecast number of people over 65 years.

This results in 387 additional aged care places being required by 2036.

Residents and key workers likely to be eligible for Affordable Housing

The following table provides a breakdown of residents and key workers likely to be eligible for Affordable Housing under the NSW Affordable Housing Ministerial Directions.

Table 34 Residents and Key Workers Eligible for Affordable Housing

Estimated number of households likely eligible for Affordable Housing	
Estimated minimum number of households eligible for Affordable Housing including those in housing rental stress in the LGA, key workers living outside the North District earning less than $52,000 and estimated homeless population	4,082
Estimated maximum number of households eligible for Affordable Housing including those in housing stress in the LGA plus over 55s in mortgage stress in LGA, key workers living outside the North District earning less than $104,000 per annum	7,843

Summary of findings – special needs housing

» ***The Housing Needs Analysis found that at least 4,000 Affordable Housing dwellings could likely be utilised in the LGA based on eligibility under the NSW Affordable Housing Ministerial Guidelines.*** This minimum is comprised of households in rental stress residing in the LGA (many of which are older households), lower paid key workers that travel from outside the North District to the LGA that work in aged care and other key services, and the number of people identified as homeless by the ABS. Other cohorts could also be eligible. These have been used to determine an upper level of number of people that would likely be eligible for Affordable Housing.

» ***387 additional aged care places are likely to be required by 2036*** to provide the same ratio of places as at 2016. While health and life expectancy is improving in older cohorts, this is likely to be offset by the forecasted significant increase in the over 85 population in the frail category in the Ku-ring-gai LGA.

[17] Australian Institute of Health and Welfare, https://www.aihw.gov.au/reports/life-expectancy-death/deaths-in-australia/contents/life-expectancy

16.3 Housing Need Study findings and comparison with DPIE implied dwelling requirements

Table 35 summaries the findings of the Housing Need Study for market housing in comparison to the Department of Planning, Industry and Environment forecast of implied dwellings required.

Table 35 Summary of dwelling demand

Housing need by typology by demographic	Number	Percentage of total by typology	Total
Apartments (young adult/beginning families)	909	54%	5,733
Apartments (ageing population)	3,820		
Apartments (one parent)	1,004		
Semi-detached/terrace/villa/dual occupancy (ageing population)	3,609	46%	4,971
Semi-detached/terrace/villa/dual occupancy (couples with children)	1,362		
Housing need total (2016 – 2036)			10,704
Department of Planning, Industry & Environment Implied Dwelling Projections (2016 – 2036)			10,660
Delivered or dwellings in the pipeline 2016 – 2021			4,302
Total dwelling requirement (2022 – 2036)			**6,402**

A Local Housing Strategy Data Sources, Research Sources, Explanations and Glossary

Geographical Areas

Greater Sydney and the North District have been selected as geographical areas for comparison. Local government areas (LGAs) that 'border' Ku-ring-gai include Ryde, Willoughby, Hornsby and the Northern Beaches.

Greater Sydney

The Department of Planning, Industry and Environment's definition of Greater Sydney includes the following LGAs:

Blacktown, Blue Mountains, Botany Bay, Burwood, Camden, Campbelltown, Canada Bay, Canterbury-Bankstown, Cumberland, Fairfield, Georges River, Hawkesbury, Hornsby, Hunter's Hill, Inner West, Ku-ring-gai, Lane Cove, Liverpool, Mosman, North Sydney, Northern Beaches, Parramatta, Penrith, Randwick, Rockdale, Ryde, Strathfield, Sutherland, Sydney, The Hills, Waverly, Willoughby, Wollondilly and Woollahra

Where possible, Greater Sydney data for comparison purposes has been extracted from the Department of Planning, Industry and Environment's datasets. In instances where this is not possible, Australian Bureau of Statistics (ABS) Greater Sydney data has been used. Note that this ABS data for Greater Sydney also includes the Central Coast LGA.

The North District

The North District includes the following LGAs:

Hornsby, Hunter's Hill, Ku-ring-gai, Lane Cove, Northern Beaches, Mosman, Willoughby, Ryde and North Sydney

Note that North District data for comparison purposes includes the Ku-ring-gai LGA.

NSW Projections

For all data displays compiled using NSW population and household projections data, population numbers are rounded to the nearest 50, as unrounded numbers give a false sense of accuracy to the projections. Projections are developed to give an indication, rather than an exact number.

Reference: Department of Planning and Environment (2016), 2016 New South Wales State and Local Government Area population and household projections. Sydney, NSW.

Population Projections

Projections are not targets; they are based on assumptions that take into account trends for births, deaths and migration. The main projection series is that which the Department of Planning, Industry and Environment provides for its reporting responsibilities. The high and low series should not be interpreted as an upper and lower bound for potential population growth. They are designed to explore a plausible range of future population changes and show the impact on population when the assumed levels of births, deaths and migration are changed. The following data sets were used for the projection assumptions; jump-off population, births, deaths and life expectancy, overseas migration, interstate migration, intrastate migration and the Housing Unit Method. All projection scenarios, except for zero migration, lie between the high and low population projections. These projections do not necessarily reflect policy positions and may differ from policy targets expressed in Metropolitan and Regional Plans.

The projections were published in December 2019. The projections are based on (or jump-off from) the 30 June 2011 Estimated Resident Populations (ERPs) supplied by the ABS. The ERP includes usual residents who are overseas for less than 12 months but excludes overseas visitors who are in Australia for less than 12 months.

Household Projections

Household projections show the number of households that would form if demographic trends continue and if assumptions about living arrangements are realised over the projection period. Household projections show the future number and type of households living in private dwellings, including houses, apartments, mobile homes or other 'substantial' structures. It does not include accommodation such as boarding houses, nursing homes or prisons. The NSW Household Projections are preparing using the sequential propensity household projection model. For more information regarding this model, please see the NSW Household Projections User Guide. The 2019 NSW population projections give the starting point for the 2016 NSW household projections. The 2011 Census is used to work out the likelihood of a person living in a particular type of household by age. The jump-off number of households and dwelling are for 2011, based on Census counts of households and dwellings, extra adjustments are made to estimate the household and dwelling undercount.

Implied Dwelling Requirements

Projected implied dwelling requirements shows how many dwellings are likely to be needed to accommodate the projected population and the households likely to form. Implied dwelling demand projections are not dwelling targets or a projection of future dwelling construction. Household projections do not include non-private dwellings such as boarding houses and nursing homes.

ABS Census Data

The data in this report is based on 2016 Census data, with comparison years of 2006 and 2011. Annual estimates have been used where available.

Tables containing cells with very small counts are subjected to confidentiality processes before release, and cells are randomly adjusted to avoid the release of confidential data. No reliance should be placed on small cells as they are impacted by perturbation, respondent and processing errors. Perturbation makes small changes to all estimates including both the interior cells of the table and the totals. If you attempt to reconstruct a total on the basis of the perturbed interior cells, you will add together the small changes made to each cell which may result in a large change relative to the perturbed total. For more information please see the Confidentiality of Census data Factsheet.

In general, not stated and not applicable counts have been excluded from the data displays and acknowledged in notes. Where necessary, categories have been defined in the notes for each data display. For more information, please see the Census of Population and Housing Census Dictionary, 2016 (ABS).

NSW Department of Planning and Environment Metropolitan Housing Monitor

Greater Sydney Regional Housing Activity

Dwelling Approvals refers to a residential development that has received the final approval to construct. Net dwelling completions refer to the difference between the number of completed dwellings compared to the existing stock, adjusted for demolitions. New water connections are used as a proxy for completions. A limitation to this data is that certain secondary dwellings that do not use a separate water connection are not counted.

List of Data Sources

Australian Bureau of Statistics (ABS)

ABS – Aboriginal and Torres Strait Islander Peoples Profile (2016)

ABS - ABS.Stat Region Profiles (2018)

ABS – Census QuickStats (2016)

ABS – Community Profile (2006, 2011 and 2016)

ABS - Estimated Resident Population

ABS – TableBuilder Basic

ABS - TableBuilder Pro

ABS - Time Series Profile (2016)

ABS - Census of Population and Housing - Estimating homelessness (2016)

Department of Family and Community Services (FACS)

Department of Family and Community Services – Local Government Housing Kit Database

Department of Family and Community Services – Social Housing Wait Time Data

Department of Family and Community Services – The Rent and Sales Report Interactive Dashboard and Past Reports

Department of Planning, Industry and Environment (DPIE)

Department of Planning, Industry and Environment – Community Profile Tool (LGA)

Department of Planning, Industry and Environment – Demography and Housing Dashboard (2016)

Department of Planning, Industry and Environment - Metropolitan Housing Monitor

Department of Planning, Industry and Environment – NSW Household and Dwellings Projections Data (2016)

Department of Planning, Industry and Environment – NSW Population Projections Data (2016)

Other

GSC - North District Plan (2018)

SQM Research – Vacancy Rates by Suburb (March 2019)

Landcom Housing Indicators 2018

Other research sources

AHURI "Moving, downsizing and housing equity consumption choices of older" November 2019 Australianshttps://www.ahuri.edu.au/__data/assets/pdf_file/0024/49119/AHURI-Final-Report-321-Moving-downsizing-and-housing-equity-consumption-choices-of-older-Australians.pdf

AHURI "Effective Downsizing Options for Older Australians" (February 2020) https://www.ahuri.edu.au/__data/assets/pdf_file/0033/56886/AHURI-Final-Report-325-Effective-downsizing-options-for-older-Australians.pdf

Glossary

Australian Bureau of Statistics (ABS)

The ABS provides statistics on a wide range of economic, industry, environment and energy, people and regional matters, covering government, business and the community in general.

affordable housing

Housing that is affordable for households on low to moderate incomes, when housing costs are low enough to enable the household to meet other basic long-term living costs as defined by criteria in the NSW Affordable Housing Ministerial Direction.

average household size

The average number of people per household in a given area.

Census

The Census of Population and Housing, carried out every five years by the Australian Bureau of Statistics. It aims to accurately measure the number of people in Australia on Census night, and to gather information on their key characteristics and the dwellings in which they live. Census 2016 is the most recent Australian Census for which data is available

dwelling approval

Permission to commence construction of a building, such as a building permit issued by local government authorities and other principal certifying authorities, contract let or day labour work authorised by

Commonwealth, State/Territory, semi-government and local government authorities, or major building approval in areas not subject to normal administrative approval, for example building on remote mine sites.

dwelling completion

A dwelling is completed when building activity has progressed to the stage where the building can fulfil its intended function.

homelessness

A person is homeless if he or she does not have access to adequate housing that is safe and secure. People who are homeless fall into three broad groups — those who are:

» sleeping rough (living on the streets);

» living in temporary accommodation, such as crisis accommodation or with friends or relatives; and

» staying in boarding houses or caravan parks with no secure lease and no private facilities.

household

The household is the basic unit of analysis in this publication. A household consists of one or more people, at least one of whom is at least 15 years of age, usually resident in the same private dwelling. The people in a household may or may not be related. They must live wholly within one dwelling.

housing stress

The condition of households (in the bottom 40 per cent of income distribution) paying more than 30 per cent of their gross income on mortgage or rental repayments.

» lower-income household

» A household with income in the bottom 40 per cent of all household income distribution.

net overseas migration

A figure calculated from incoming and outgoing passenger movements at Australian ports maintained by the Department of Immigration and Citizenship. A person must have been in Australia for 12 of the previous 16 months to be counted.

non-private dwelling

A non-private dwelling is an establishment that provides a communal type of accommodation. NPDs are classified according to their function. Some examples are hotels, motels, guest houses, jails, religious and charitable institutions, military establishments, hospitals, hostel type accommodation in nursing or retirement villages (not self-contained) and other communal dwellings. Where this type of accommodation includes self-contained units (as provided by hotels, motels, homes for the elderly and guest houses), the units are enumerated as private dwellings depending on the purpose/length of occupancy. Self-contained units within retirement villages are private dwellings.

place of enumeration

The place of enumeration is the place at which a person is counted in the Census — that is where he/she spent Census night, which may not be where he/she usually lives. This count includes people away from their usual residence in another part of the country, and overseas visitors. Overseas visitors to Australia are counted regardless of how long they have been in the country or how long they plan to stay. The count also includes people on board vessels in or between Australian ports, or on long-distance trains, buses or aircraft. Australian residents temporarily out of the county on Census Night and overseas diplomatic personnel and their families are out of scope and so excluded from Census counts.

place of usual residence

This is the place where a person usually lives. It may or may not be the place where the person was counted on Census night. Each person is required to state his/her address of usual residence on the Census form. In effect the ABS reallocates people away from home on Census night back to their usual residence. The ABS also excludes overseas visitors.

private dwelling

A private dwelling is defined in the Census as a house, a flat, part of a house, or even a room. It can also be a house attached to, or rooms above, a shop or office, an occupied caravan in a caravan park, a boat in a marina, a houseboat, or a tent. A caravan situated on a residential allotment is also classed as a private dwelling as are self-contained units within retirement villages.

semi-detached, row or terrace house, townhouse

A dwelling that has its own private grounds and no other dwellings above or below but is attached to an adjacent dwelling.

social housing

Rental housing that is provided and/or managed by government or non-government organisations, including public and community housing.

tenure type

The nature of a person's or social group's legal right to occupy a dwelling. Tenure types include owner (fully owned or being purchased with mortgage), renter (private housing or public/community housing), rent free, life tenure scheme, shared equity and rent/buy scheme or other tenure.

List of Abbreviations and Acronyms

ABS – Australian Bureau of Statistics

avg – average

CBD – Central Business District

CRA – Commonwealth Rent Assistance

DPIE – Department of Planning Industry and Environment

ERP - Estimated Resident Population

ha – hectares

LGA - Local Government Area

NSW - New South Wales

elton consulting

Ku-ring-gai Council

Ku-ring-gai Housing Strategy

Appendix 3 - Residual Capacity Maps

Residual Capacity Assessment - Methodology

The Residual capacity for the existing land use controls across the LGA has been analysed using council records of Developed Sites (Residential and Mixed Use) and DA approvals over 15 years between 2004 and 2020. These records were assessed in detail to determine the average annual take up rates of the existing R3/R4/B2 and B4 zoned sites. The study found that there has been 'good' to 'comprehensive' take up across the R3, R4 and B4 zones with the highest take-up rate in Pymble at 90% and the lowest in Lindfield at 60% over that 15 year time period. In contrast, the take-up rates in B2 mixed use zones has been poor in almost all the centres, (except Lindfield), where over the period from 2012-2020 there has been almost no constructed dwellings within the B2 zone.

The respective take up rates were then applied to the remaining Undeveloped –Residential (R3 and R4 zoned) sites in each centre, as well as B4 zoned sites in Gordon and some B2 zoned sites in Lindfield, to determine the likely numbers of dwellings that could be delivered in future under the current planning controls. It was found that within existing planning controls, there is a residual capacity of approximately 2,700 dwellings. As stated above the residual capacity on Undeveloped – Mixed Use Sites (B2 zoned), in all centres except Lindfield, is negligible.

The detailed assumptions used in determining the Residual Capacity are given below:

Developed Land (Residential and Mixed Use)

▶ Assumptions

- Includes recent completions to June 2020;
- Includes all past/historic strata title developments;
- Includes land zoned High Density Residential (R4) and Medium Density Residential (R3);
- Redevelopment considered unlikely as FSR/height well below viability tipping point;
- Viability assumptions based on feasibility analyses undertaken by Jones Lang LaSalle and AEC in 2019 and 2020; and
- No future dwelling yield anticipated.
- Dwelling yield between 2016 and June 2020 included in stage 1 targets

Undeveloped Land (Residential)

▶ Assumptions

- Includes land zoned High Density Residential (R4) and Medium Density Residential (R3);
- Includes sites with no development approval (DA);
- Includes sites with development approval (DA) (but where construction has not yet commenced);
- Anticipated moderate to high levels of take-up (60-90%) based on documented take-up rates since 2004 from Council records and DPIE; and
- Estimated future yield included within residual dwelling forecast.

Undeveloped Land (Mixed Use)

▶ Assumptions

- Land zoned Local Centre (B2) and Mixed Use (B4);
- Redevelopment considered mostly not viable due to high land values and fragmented ownership;
- Viability assumptions based on feasibility analyses undertaken by Jones Lang LaSalle and AEC in 2019 and 2020;
- Very low take-up rate (<5%);
- Very limited future dwelling yield .

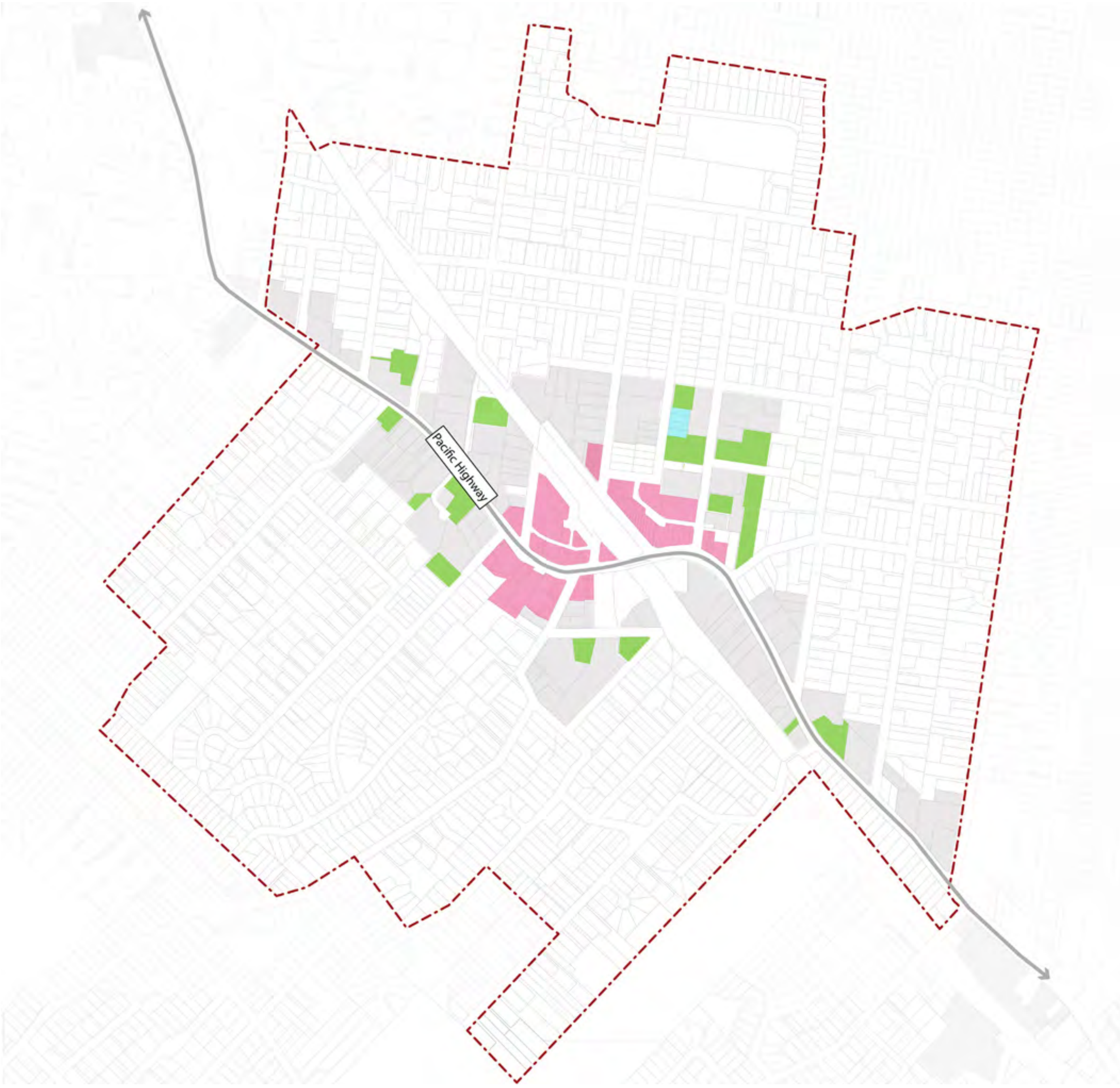
Pipeline

▶ Assumptions

- Land zoned for High Density Residential (R4) and Medium Density Residential (R3) and Local Centre (B2) and Mixed Use (B4);
- Includes sites with development approval (DA) and currently under construction;
- Anticipated full take-up (100%) based on documented take-up rates since 2004 from Council records and DPIE;
- Estimated yield excluded from residual dwelling forecast.

Based on these assumptions, Residual Capacity Maps have been prepared which identify sites within Ku-ring-gai where there is residual capacity for housing delivery under the existing zonings (R3,R4, B2 and B4) and planning controls contained within the Ku-ring-gai Local Environmental Plans.

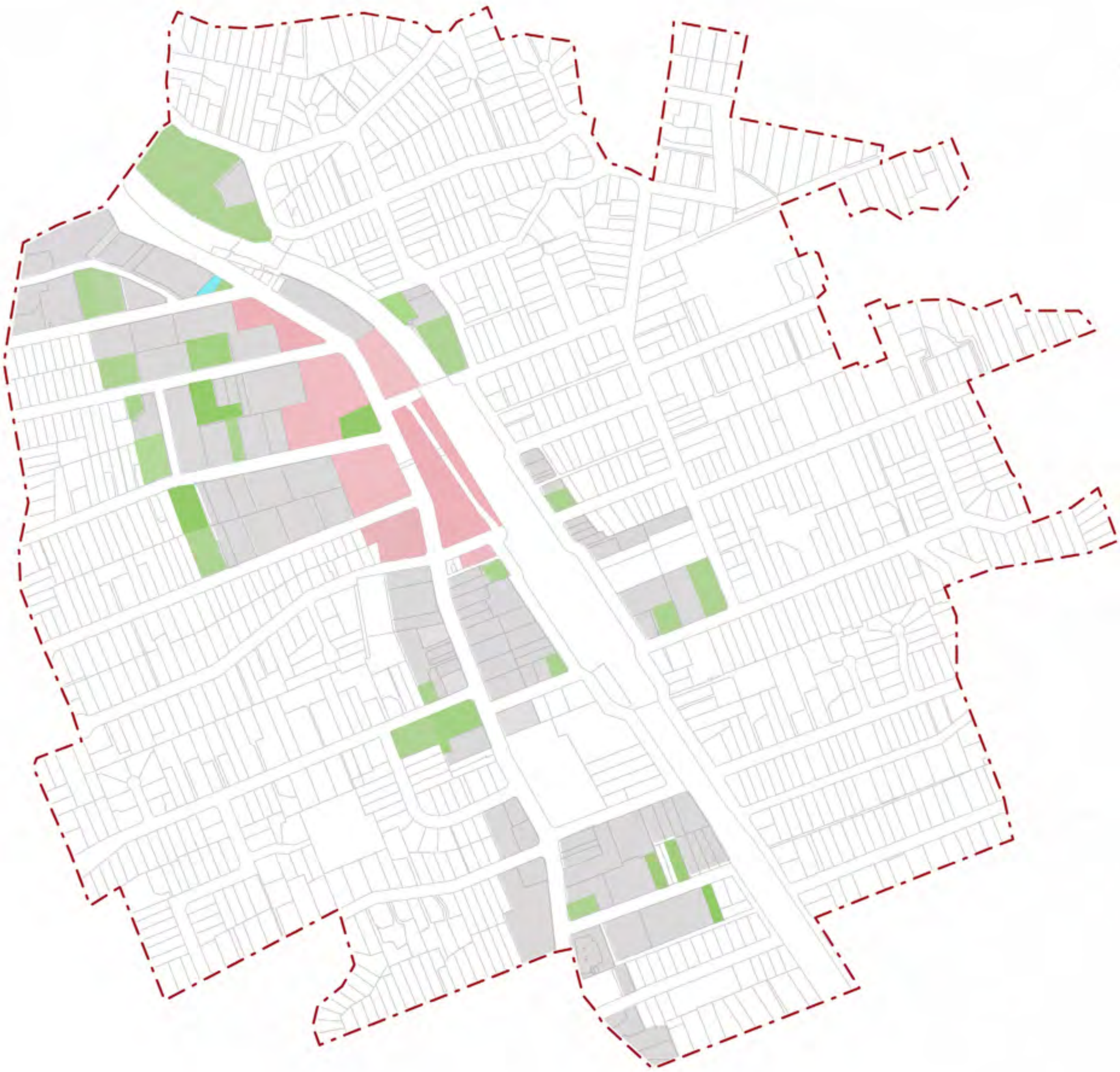
Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - Turramurra Local Centre



Key

- Undeveloped Land - Residential (R3 and R4 Zones) - Moderate to High Levels of Take-up (81%)
- Undeveloped Land - Mixed Use (B2 Zones) - Very Low Take-up (<5%)
- Developed Land - Residential and Mixed Use (R3,R4 B2 and B4 Zones)
- Pipeline - Currently Under Construction
- Other - Low density residential (R2 and E4 Zones) and other zones (SP2, RE1 etc.) - No change

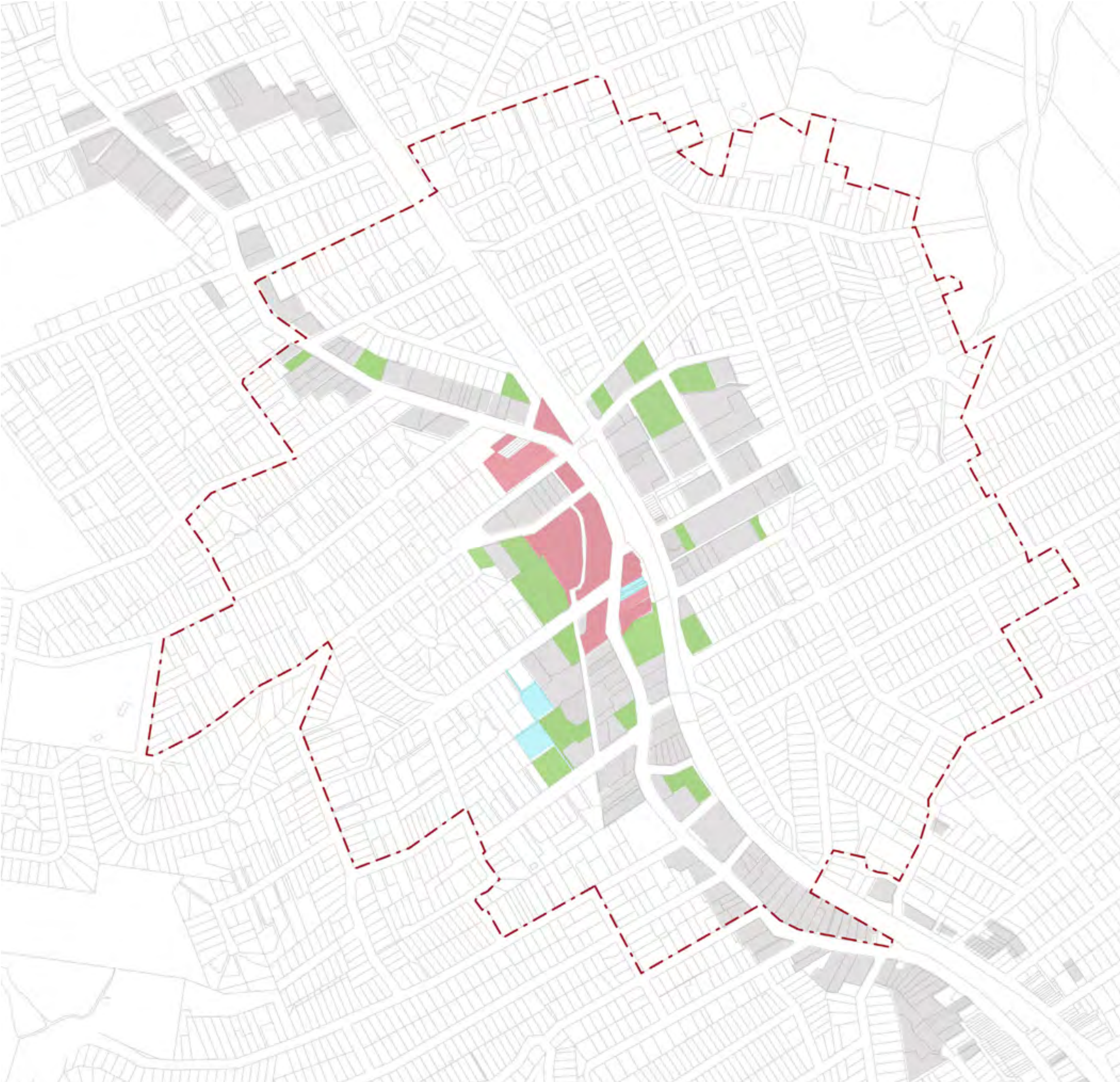
Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - Gordon Local Centre



Key

- Undeveloped Land - Residential (R3 and R4 Zones) - Moderate to High Levels of Take-up (75%)
- Undeveloped Land - Mixed Use (B2 Zones) - Very Low Take-up (<5%)
- Developed Land - Residential and Mixed Use (R3,R4 B2 and B4 Zones)
- Pipeline - Currently Under Construction
- Other - Low density residential (R2 and E4 Zones) and other zones (SP2, RE1 etc.) - No change

Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - Lindfield Local Centre



Key

Undeveloped Land - Residential (R3 and R4 Zones)
- Moderate to High Levels of Take-up (60%)

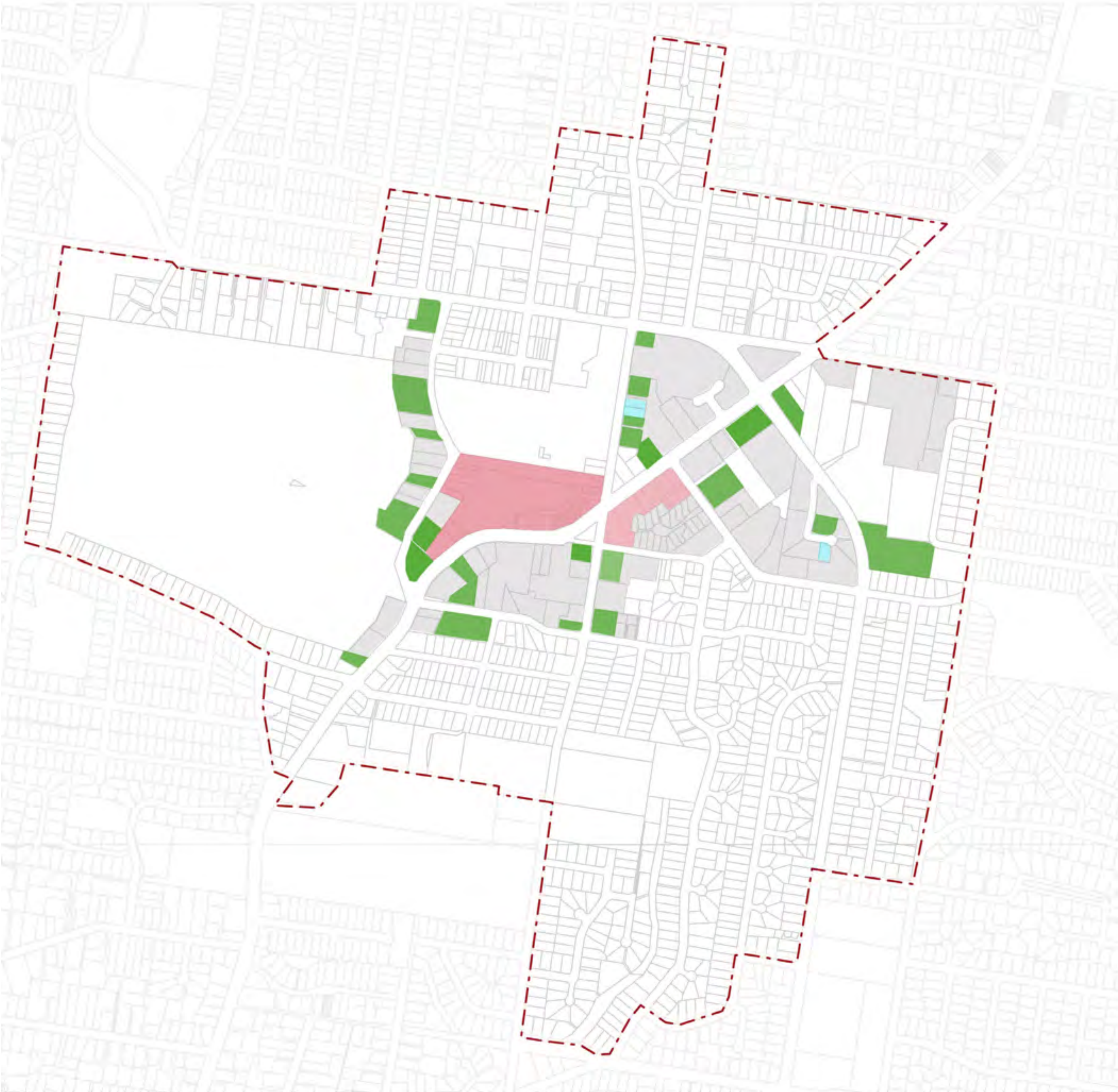
Undeveloped Land - Mixed Use (B2 Zones)
- Moderate Levels of Take-up (50%)

Developed Land - Residential and Mixed Use
(R3,R4 B2 and B4 Zones)

Pipeline
- Currently Under Construction

Other - Low density residential (R2 and E4 Zones)
and other Zones (SP2, RE1 etc.)
- No change

Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - St Ives Local Centre



Key

- Undeveloped Land - Residential (R3 and R4 Zones) - Moderate to High Levels of Take-up (75%)
- Undeveloped Land - Mixed Use (B2 Zones) - Very Low Take-up (<5%)
- Developed Land - Residential and Mixed Use (R3,R4 B2 and B4 Zones)
- Pipeline - Currently Under Construction
- Other - Low density residential (R2 and E4 Zones) and other zones (SP2, RE1 etc.) - No change

Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - Killara

Key

- Undeveloped Land - Residential (R3 and R4 Zones) - Moderate to High Levels of Take-up (77%)
- Undeveloped Land - Mixed Use (B2 Zones) - Very Low Take-up (<5%)
- Developed Land - Residential and Mixed Use (R3,R4 B2 and B4 Zones)
- Pipeline - Currently Under Construction
- Other - Low density residential (R2 and E4 Zones) and other zones (SP2, RE1 etc.) - No change

Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - Pymble

Key

- Undeveloped Land - Residential (R3 and R4 Zones) - Moderate to High Levels of Take-up (90%)
- Undeveloped Land - Mixed Use (B2 Zones) - Very Low Take-up (<5%)
- Developed Land - Residential and Mixed Use (R3,R4 B2 and B4 Zones)
- Pipeline - Currently Under Construction
- Other - Low density residential (R2 and E4 Zones) and other zones (SP2, RE1 etc.) - No change

Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - Roseville

Key

Undeveloped Land - Residential (R3 and R4 Zones)
- Moderate to High Levels of Take-up (80%)

Undeveloped Land - Mixed Use (B2 Zones)
- Very Low Take-up (<5%)

Developed Land - Residential and Mixed Use (R3,R4 B2 and B4 Zones)

Pipeline
- Currently Under Construction

Other - Low density residential (R2 and E4 Zones) and other zones (SP2, RE1 etc.)
- No change

Estimated Future Take-up Within Existing Medium and High Density Residential Zones and Mixed Use Zones - Wahroonga

Key

- Undeveloped Land - Residential (R3 and R4 Zones) - Moderate to High Levels of Take-up (72%)
- Undeveloped Land - Mixed Use (B2 Zones) - Very Low Take-up (<5%)
- Developed Land - Residential and Mixed Use (R3,R4 B2 and B4 Zones)
- Pipeline - Currently Under Construction
- Other - Low density residential (R2 and E4 Zones) and other zones (SP2, RE1 etc.) - No change

Residual Capacity Summary

	Residual Capacity	Pipeline
Gordon Local Centre	561	20
Lindfield Local Centre	532	85
Turramurra Local Centre	286	30
St Ives Local Centre	408	23
Pymble	229	59
Killara	324	0
Roseville	218	0
Wahroonga	212	0
Total	2,770	217

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