Local Economy and Employment

TOURISM

Ku-ring-gai Local Planning Priority
K24. Diversifying Ku-ring-gai’s local economy through the expansion of tourism and the local visitor economy

BACKGROUND

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

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

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

STRATEGIC RESPONSE

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

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

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

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

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

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

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

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

12 Estimate 2016 – Tourism Research Australia, YE June 216, STA2 areas: Wahroonga/Warrawee, Turramurra, St Ives, Pymble, Lindfield/Roseville, Gordon/KIara
Tourism - Ku-ring-gai Local Planning Priority and Actions

<table>
<thead>
<tr>
<th>Ku-ring-gai Council</th>
<th>Ku-ring-gai Local Planning Priority</th>
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<tbody>
<tr>
<td></td>
<td><em>K24. Diversifying Ku-ring-gai’s local economy through the expansion of tourism and visitor economy</em></td>
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<tr>
<td>Actions</td>
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<tr>
<td></td>
<td>• Implement land use based actions from the adopted Ku-ring-gai Destination Management Plan 2017-2020 including:</td>
</tr>
<tr>
<td></td>
<td>- Support sustainable development of new accommodation infrastructure to stimulate overnight visitor stays by reviewing development control and land use policies to identify suitable locations and encourage the establishment of these facilities (medium term).</td>
</tr>
<tr>
<td></td>
<td>- Ensure opportunities for the establishment of high quality hospitality and retail operations that are attractive to visitors, and are considered as part of strategic planning for Lindfield, Gordon and Turramurra Hub projects (ongoing).</td>
</tr>
<tr>
<td></td>
<td>- Progress renewal and opening of Marian Street Theatre (short-medium term).</td>
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<tr>
<td></td>
<td>- Preparation of revised master plan for St Ives Showground Precinct as a regional tourism and events destination (ongoing).</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>North District Plan</th>
<th>Planning Priority N13</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Supporting growth of targeted industry sectors</td>
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<thead>
<tr>
<th>Greater Sydney Region Plan</th>
<th>Objective 24</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Economic sectors are targeted for success</td>
</tr>
</tbody>
</table>
RETAIL AND COMMERCIAL CENTRES

Ku-ring-gai Local Planning Priority
K25. Providing for the retail and commercial needs of the local community within Ku-ring-gai’s centres

BACKGROUND

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

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

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

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Average supermarket store provision (persons per store)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney Metropolitan</td>
<td>11,165 persons per store</td>
</tr>
<tr>
<td>Ku-ring-gai</td>
<td>20,000 persons per store</td>
</tr>
</tbody>
</table>

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

STRATEGIC RESPONSE

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

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

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

\(^\text{13}\) Deep End Services Pty Ltd, 2016, Sydney Retail Demand and Supply Consultancy Stage 1, 2 and 3 reports
A Vibrant Touch of Ethiopia on the Streets of Turramurra, Pacific Highway by Kay Watson
PRINCIPLES FOR RETAIL AND COMMERCIAL CENTRES

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

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

| Ku-ring-gai Council | Ku-ring-gai Local Planning Priority  
K25. Providing for the retail and commercial needs of the local community within Ku-ring-gai’s centres  

### Actions
- Prepare a Retail/Commercial Centres Strategy to align with population growth and address retail supply and demand in Ku-ring-gai, including the following:
  - Establish a centres hierarchy and investigate the interrelationship between centres and their roles and functions;
  - Future demand for retail and commercial floor space in the context of population growth, demographic changes and retail trends;
  - Assessment of impact and influence of nearby strategic centres eg. Hornsby and Macquarie Park;
- Identify opportunities to support the role and function of centres, such as complementary land uses (short term).
- Identify future planning responses to deliver the outcomes of the Retail/Commercial Centres Strategy to 2036 (short-medium term).  

| North District Plan | Planning Priority N10  
Growing investment, business opportunities and jobs in strategic centres  

| Greater Sydney Region Plan | Objective 22  
Investment and business activity in centres |
Employment

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

BACKGROUND

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

KU-RING-GAI RESIDENTS – EMPLOYMENT

► Employment

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

In 2016, the employment status of Ku-ring-gai residents was 34,310 residents employed in full time work and 19,924 residents employed in part time work. The unemployment rate within Ku-ring-gai was 4.7%, much lower than the Greater Sydney average of 6.0% in 2016\(^{16}\).

<table>
<thead>
<tr>
<th></th>
<th>Manager</th>
<th>Professional</th>
<th>Technician</th>
<th>Community, personal service</th>
<th>Clerical</th>
<th>Sales worker</th>
<th>Machinery</th>
<th>Labourer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ku-ring-gai</td>
<td>21%</td>
<td>40%</td>
<td>5%</td>
<td>7%</td>
<td>14%</td>
<td>8%</td>
<td>1%</td>
<td>3%</td>
</tr>
<tr>
<td>Greater Sydney</td>
<td>14%</td>
<td>27%</td>
<td>12%</td>
<td>10%</td>
<td>15%</td>
<td>9%</td>
<td>6%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: ABS 2016 – Occupation of employed persons

Figure 3-7 Occupation – Ku-ring-gai Residents 2016

14 Australian Bureau of Statistics, 2017
15 Year ending 2018 - National Institute of Economic and Industry Research, 2018 (NIEIR)
16 Australian Bureau of Statistics, 2016 – By usual residence
17 Australian Bureau of Statistics, 2016
18 Australian Bureau of Statistics, 2016 - By place of work
INDUSTRIES AND EMPLOYMENT WITHIN KU-RING-GAI — PEOPLE WHO WORK IN KU-RING-GAI

**Jobs and Employment**

Ku-ring-gai’s workforce is made up of all the people who are employed within Ku-ring-gai, regardless of where they live. Ku-ring-gai’s local economy comprised of 38,052 local jobs in the year ending 2018. A count of jobs is one of the most fundamental economic indicators of the size of the local economy, and increasing numbers of jobs generally represents a growing economy. Figure 3.8 below shows the growth of local jobs within Ku-ring-gai since 2006 and recent trends show that between 2016 and 2018 there has been a 7.17% increase in the number of local jobs within Ku-ring-gai.

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>38,052</td>
<td>+7.17%</td>
</tr>
<tr>
<td>2016</td>
<td>35,506</td>
<td>+1.15%</td>
</tr>
<tr>
<td>2011</td>
<td>35,099</td>
<td>+3.13%</td>
</tr>
<tr>
<td>2006</td>
<td>34,033</td>
<td>-</td>
</tr>
</tbody>
</table>

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

Figure 3-8 Growth Trends in Local Jobs – Ku-ring-gai

**Industry**

The industry sectors providing the highest percentage of local employment within the Ku-ring-gai economy are shown in the Figure 3.9 below:

<table>
<thead>
<tr>
<th>Industry</th>
<th>% of local jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care and Social Assistance</td>
<td>24%</td>
</tr>
<tr>
<td>Education and Training</td>
<td>19%</td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>12%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>9%</td>
</tr>
<tr>
<td>Construction</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: ABS 2016 – By place of work

Figure 3-9 Local Employment by Industry Sector

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

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

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

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

19 Australian Bureau of Statistics, 2011 – methods of travel to work (residents)
Specialised precincts

CSIRO - Research and Innovation

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

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

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

The SAN - Health and Education

Ku-ring-gai does not have any identified health or education precinct within the North District Plan; however, the Sydney Adventist Hospital (SAN), the largest private hospital in NSW and a combined health and education facility is located in Wahroonga. The SAN is a teaching hospital of the University of Sydney and Avondale College, as well as operating its own educational college. The precinct includes non-government K-12 school and plans for approximately 500 dwellings, further student and nurse accommodation associated with the hospital and additional commercial space. The SAN is identified in Figure 3-10 Local Economy and Employment as a health and education precinct.

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

Pymble Business Park

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

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

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

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

STRATEGIC RESPONSE

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

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

Ku-ring-gai has high levels of home based businesses, and findings from the community engagement undertaken in 2017 for the review of the Community Strategic Plan – Our Ku-ring-gai 2038 showed that there was desire from the community to see co-working hubs for businesses and people who work from home to be provided. The new Employment Lands Study will need to further investigate and assess the needs and opportunities for smart work hubs within Ku-ring-gai, which may make home based work a more viable option for more people. Home based work presents an opportunity for economic growth to build on Ku-ring-gai’s assets, but may also present a threat to Local Centres and Pymble Business Park if growth in home based work occurs at the expense of growth in employment centres.

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

The health and education sectors contribute significantly to employment and the local economy within Ku-ring-gai. However, one of the key challenges is that while these institutions (private schools and private hospitals, such as the SAN) are large employers within Ku-ring-gai, Council will need to manage the impacts of future growth on the surrounding areas and infrastructure.
Principles for local economy and employment

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

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

### Ku-ring-gai Local Planning Priority

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

**Actions**

- Prepare Employment Lands Study to:
  - undertake a detailed strategic review of employment activities within Ku-ring-gai including current and future floor space requirements, jobs, local businesses and contribution of commercial lands to local economy;
  - assess impacts of the high cost of small office rentals in strategic centres, and the loss of commercial office space due to residential take up;
  - investigate employment opportunities arising from new technology and innovation;
  - investigate home based businesses and demand for supporting infrastructure such as smart work hubs;
  - investigate the contribution the SAN and the CSIRO make to Ku-ring-gai’s local economy, as well as any opportunities for other potential co-located facilities such as accommodation, commercial and mixed use development (short term).
- Undertake an investigation of Pymble Business Park to consider the current and future strategic role and function, floor space and land uses (short term).

### North District Plan

**Planning Priority N9**
Growing and investing in health and education precincts

**Planning Priority N10**
Growing investment, business opportunities and jobs in strategic centres

**Planning Priority N11**
Retaining and managing urban services land

### Greater Sydney Region Plan

**Objective 21**
Internationally competitive health, education, research and innovation precincts

**Objective 22**
Investment and business activity in centres

**Objective 23**
Industrial and urban services land is planned, retained and managed
Figure 3-10 Local Economy and Employment