



YOUR VISION.  
YOUR FUTURE.

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## Housing Strategy Exhibition Draft



An aerial photograph of the Hornsby Shire, showing a mix of urban, commercial, and residential areas. A large, semi-transparent grey silhouette of the shire's boundary is overlaid on the image. The text "LET'S SHAPE THE HORNSBY OF TOMORROW." is written in white, sans-serif capital letters across the center of the silhouette.

LET'S SHAPE  
THE HORNSBY  
OF TOMORROW.



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# Section 1 Introduction

“Support community well-being through the provision of housing that is affordable and appropriate to household needs and preferences in terms of choice and location, while protecting and enhancing local surroundings and the natural environment.”

- our Housing Vision

## 1.1 Executive Summary

The draft Local Housing Strategy (LHS) outlines our 20-year vision and priorities for housing in Hornsby Shire in response to the *Greater Sydney Region Plan A Metropolis of Three Cities* and the *North District Plan*.

The LHS is consistent with the strategic priorities identified in Council's recently adopted Local Strategic Planning Statement and the 2018 Hornsby Community Strategic Plan, *Your Vision Your Future*.

Council's 2011 Hornsby Shire Housing Strategy has not been fully implemented. This LHS confirms that there is enough land zoned for housing in the short-term to meet our housing target and that, in the medium to longer term Hornsby Town Centre will provide significant housing opportunities. Council will also investigate shortages of certain types of housing in the Shire that could be provided in the longer term.

Over the last decade Sydney's population growth and housing affordability have become a critical issue. All councils are now required to prepare a local housing strategy to guide the quantity, location and type of future housing in their area. The requirement is set out in the *Greater Sydney Region Plan A Metropolis of Three Cities* and the *North District Plan* released in March 2018. Each council must identify how it will meet the housing objectives and targets in the Region and District Plan.

This document has been produced in accordance with the *Local Housing Strategy Guideline and Template* (October 2018) provided by the NSW Department of Planning, Industry and Environment (DPIE).



## The Bushland Shire Today and Tomorrow

Hornsby Shire is located in Sydney's northern suburbs, 25km from the Sydney CBD. It covers a land area of 460 square kilometres, of which nearly 70% is National Park and reserves.

We share a boundary with The Hills Shire to the west, Ku-ring-gai Council and Northern Beaches Council to the east, and Parramatta Council and Ryde Council to the south.

The Shire is characterised by an urbanised southern area which is well served by road and rail infrastructure. Our strategic centre is Hornsby Town Centre which is surrounded by several urban suburbs. In recent years there has been noticeable growth in higher density housing developments (townhouses, five and eight-to-ten storey apartment blocks) in our planned precincts. These are focused near train stations and commercial centres in parts of Asquith, Beecroft, Hornsby, Mount Colah, Pennant Hills, Thornleigh, Waitara and West Pennant Hills.

Our large metropolitan rural area contains a number of distinct places and villages in a bushland setting. Many of these areas have come under significant pressure for seniors housing. A Rural Lands Study is currently being undertaken to help decide how the future of our rural areas should be managed.

The Shire will continue to be shaped by the natural environment, population growth, housing and employment opportunities. New and future road and rail infrastructure will unlock further placemaking opportunities at Pennant Hills and Cherrybrook. Opportunities in Hornsby Town Centre will be maximised to make more efficient use of land.

As the Shire evolves and grows to meet the needs of our current and future communities we will ensure that the Shire's special character is preserved.



## Key Housing Issues and Priorities

Competing issues and priorities	
Issue	Hornsby's Liveable Priorities
<p><b>Population growth - the Shire's population is predicted to reach 179,582 by 2036.</b> This represents an increase of nearly 32,000 people between 2016 and 2036. There will be a corresponding need for an additional 14,879 new homes by 2036.</p>	<p>LP1. Protecting the character of our low density neighbourhoods</p>
<p><b>Delivering homes that contribute to smaller environmental footprints.</b> We need to ensure future development is sustainable. This necessitates higher density and well-connected centres to reduce urban sprawl and congestion to address the impacts of climate change. The Council has identified Hornsby Town Centre for our long-term future housing provision.</p>	<p>LP2. Promoting design excellence for new housing including having regard to the principles of ecologically sustainable development and universal design</p>
<p><b>More housing diversity</b> is needed to meet the needs of our evolving households, age structures, incomes and cultural backgrounds. More single person and small household dwellings will be required close to transport and services. Our growing elderly population require a range of housing options to meet different needs. There is strong support from communities for an increase in housing diversity, balanced with the protection of the character of neighbourhoods.</p>	<p>LP3. Supporting the development of community and cultural facilities that will adequately service our current and future community</p>
<p><b>More affordable housing</b> is needed for key workers such as nurses, policemen and women and paramedics, along with single parent families.</p>	<p>LP4. Aligning the delivery of local infrastructure and public domain improvements with current and future growth</p>
<p><b>Demand for residential aged care and seniors living</b> is likely to continue. The Shire plays a more than prominent role in the residential aged care sector and Council has assumed that this will slightly diminish beyond 2026. A pro-active approach in identifying appropriate locations may be useful in discouraging speculative applications in inappropriate areas for Site Compatibility Certificates from State Government.</p>	<p>LP5. Protecting, conserving and promoting our natural, built and cultural heritage</p>
<p><b>Preserving local character and the natural environment</b> to ensure our bushland Shire retains the features which make it such a great place to live for our local communities.</p>	<p>LP6. Providing housing in the right locations that meets the needs of our community with regard to housing type and mix, design, sustainability, affordability and safety.</p>
	<p>LP7. Promoting the arts, creative industries and temporary uses as well as the night-time economy.</p>

Figure 1: Liveable priorities – Hornsby Local Strategic Planning Statement



## How will Hornsby Shire meet its Housing Targets?

The North District Plan outlines housing targets for the District and individual council areas until 2036. Councils need to demonstrate their short, medium and long term targets that will contribute to the District target of 92,000 new dwellings by 2036. Hornsby Shire's targets and housing supply projections are outlined below.

### Hornsby Shire 20-Year Housing Target Numbers Overview

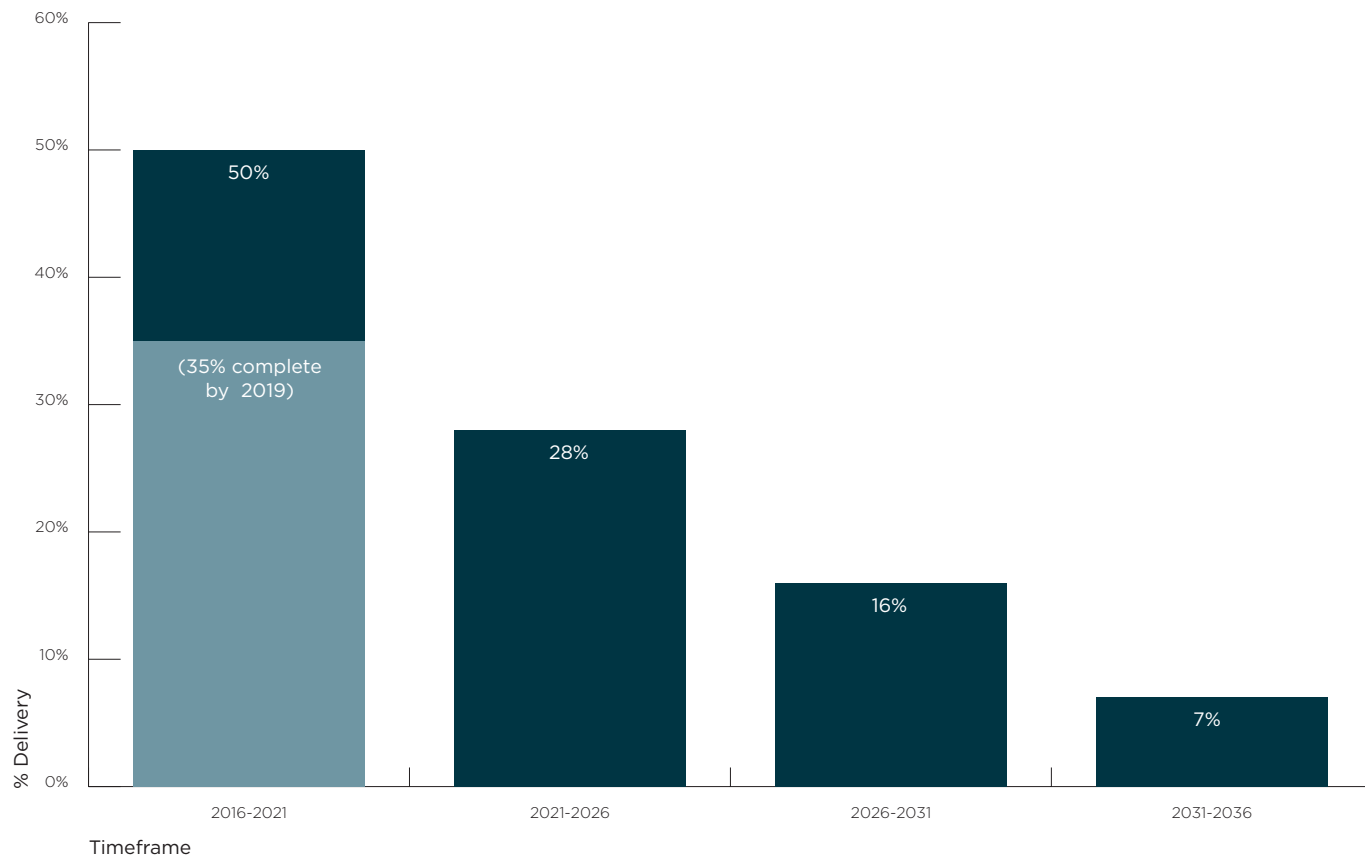
Timeframe	Hornsby Pipeline	Significant Sources of Supply	Target required by State Government
<b>Short-term 2016-2021</b>	4,459	Hornsby is on track to exceed the Shire's 5-year (2016-2021) housing supply target of 4,350 dwellings. This is directly attributable to the Housing Strategy precincts rezoned in 2011. No further re-zonings are required.	4,350
<b>Medium-term 2021-2026</b>	3,776	There will be remaining capacity in the existing housing precincts identified in the 2011 Housing Strategy, along with infill development potential. Combined with the potential redevelopment of Government-owned land around Cherrybrook Station, we forecast a minimum of 3,776 homes, meaning we are well on our way to meeting medium term housing target.	3,800 – 4,200
<b>Long-term 2026-2036</b>	6,500 to 7,500	Council forecasts suggest there is the potential to create between 6,500 and 7,500 new dwellings between 2026 to 2036. The revitalisation of the Hornsby Town Centre will provide the bulk of these new homes to meet our housing targets. Council is currently undertaking the Hornsby Town Centre Review to investigate opportunities for additional housing and jobs to strengthen its role as the major urban and commercial centre of the Shire.	TBC
<b>20 year timeframe 2016-2036</b>	14,879	<b>14,879 forecast supply</b> <ul style="list-style-type: none"> <li>■ 42% from housing precincts</li> <li>■ 40% zoned land (includes Hornsby West and infill)</li> <li>■ 18% State Government land at Cherrybrook &amp; Hornsby Town Centre</li> </ul>	TBC

Figure 2: Hornsby Shire 20-Year Housing Target Numbers Overview



Council's housing precincts make a significant contribution to Hornsby Shire's 20-year housing target, particularly in the short-term. By the end of 2019 a significant proportion of the projected housing precinct development will have already been completed. See Figure 3 below.

### Housing Precincts 2016 to 2036



**Figure 3: Housing Precincts 2016 to 2036**

Source: ABS Building Approvals, Australia, Hornsby DA Review. .id the population experts, Hornsby Shire Forecasts 2019



## 1.2 Planning and Policy Context

This Local Housing Strategy will form part of Hornsby Shire's local planning framework. It sets the vision for future housing and how it will meet strategic housing directions over the next 20 years and translate these into priorities and actions at a local level. Below is a brief overview of relevant global and national trends and the State, regional, district and local planning and policy considerations.

### Trends and implications for federal, state and local policy

Housing policy is influenced by social, environmental and economic trends at the global and national level. These trends include climate change, technology advances, house price growth and demographic change. Governments respond by developing policies on migration, taxation, infrastructure investment and land use zoning. All of these, and more have an impact on the demand and supply of housing.

The federal government generally has responsibility for demand related matters such as taxation and migration. State government has responsibility for housing supply related matters which include social housing provision, infrastructure and land use planning legislation. Local government is responsible for planning and land use zoning, development standards and local infrastructure provision.

As our understanding of sustainability and environmental issues deepens, so too has continued pressure for development. There is a continuing need for more land to meet housing needs. Where and how we provide this housing is critically important for our future well-being.

Australian long term future growth scenarios suggest we must avoid further urban sprawl of our cities which creates environmental pressure and makes it more difficult for people to access jobs and services. An alternative future requires significantly higher average density and more focus on mixed use with diverse and high-quality housing options to bring people closer to jobs, services and amenities. Housing affordability continues to be one of the fundamental challenges for the future.

### State Policy Context

#### **The Environmental Planning and Assessment Act 1979**

The EP&A Act sets out the laws under which planning in New South Wales takes place. It sets a framework for how strategic plans and planning controls are made and implemented. The EP&A Act now places a stronger emphasis on strategic planning, in particular the role of strategic planning at the district local government level across council boundaries. Figure 4 provides an overview of the roles of Planning Authorities in Greater Sydney.

### What is Council doing to Address Climate Change?

Council passed a resolution in September 2019 acknowledging that urgent action is required by all levels of government; that human induced climate change represents one of the greatest threats to humanity, civilisation and other species; and that it is still possible to prevent the most catastrophic outcomes if, and only if, societies and governments take emergency action.

Council resolved to a target of net zero emissions by 2050. Council's current actions will contribute to reducing the Shire's carbon footprint by more than 1,000 tonnes.

Under the LEP Review Council is preparing a range of studies that will influence Council's planning policies:

- Climate Change Mitigation and Adaptation Plan
- Environmental Sustainability Strategy
- Coastal Management Plan for Hawkesbury Estuary
- Water Sensitive Hornsby project
- Biodiversity Conservation Management Plan
- Urban Forest Strategy
- Rural Lands Study
- Bushfire Risk Management Plan and Bushfire Management Strategy
- Flood Management Plan.



## Roles of Planning Authorities in Greater Sydney

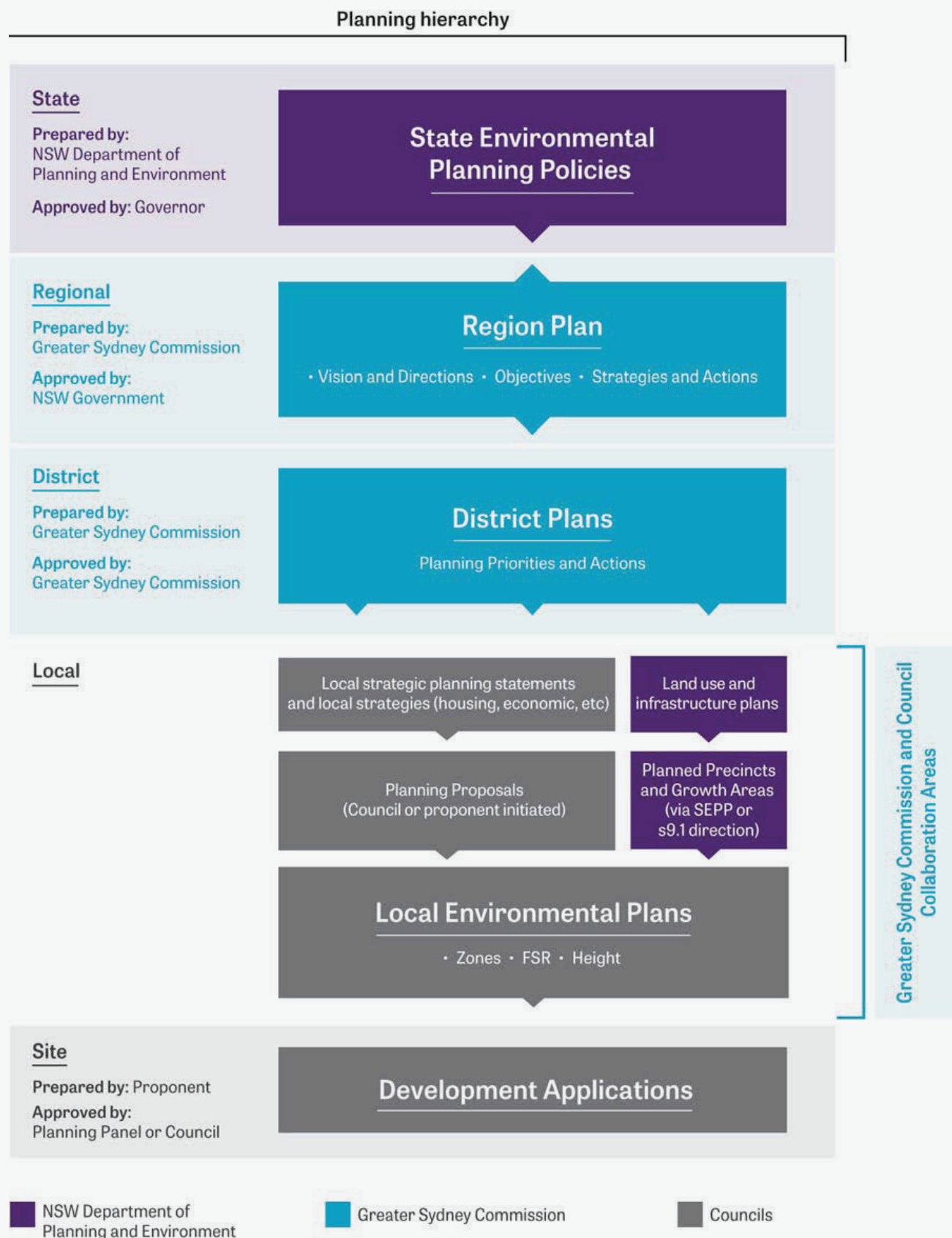


Figure 4: Roles of Planning Authorities in Greater Sydney

Source: Greater Sydney Region Plan, 2018



## State Environmental Planning Policies and Local Planning Directions

The NSW Government prepares State Environmental Planning Policies (SEPPs) and Local Planning Directions, which must be adhered to by local government planning controls and policies. Those relevant to housing include:

- SEPP 65 – Design Quality of Residential Apartment Development:
- SEPP 70 – Affordable Housing (Revised Schemes):
- SEPP Affordable Rental Housing 2009:
- SEPP Exempt and Complying Development Codes 2008:
  - Low Rise Medium Density Code 2018
- SEPP Housing for Seniors or People with a Disability 2004
- SEPP (Educational Establishments and Child Care Facilities) 2017



## Low Rise Medium Density Housing Code, 2018

The Code was introduced in July 2018 to enable one and two storey dual occupancies, manor houses and terraces to be carried out under a fast track complying development approval. Medium density housing has been referred to as the 'missing middle'.

Implementation of the Code was deferred until 1 July 2020 to allow Councils time to progress their strategic planning initiatives and demonstrate how they intend to meet their local housing needs.

An independent review of the Code has highlighted the need for more clarity and coordination with other housing related SEPPs and the need for more detailed guidance on respecting local character.

Hornsby Council has made numerous representations to the Department of Planning, Industry and Environment and the Minister raising concerns with the concept of low-rise medium density housing as Complying Development, which would override council housing strategies that are prepared in consultation with local communities having regard to unique environmental, social and economic opportunities and constraints.

The controls in the Code are inconsistent with local area planning and Hornsby Council's approach of encouraging medium density housing within a landscape setting. Council's Local Strategic Planning Statement identifies that Council will continue to advocate for changes to the State policy for medium density housing to enable Council to progress its own strategy that reflects local character and that, if Council is provided the option to prepare local controls for medium density housing that are reflective of the landscape setting of the Shire, investigations could commence into appropriate expansion of the R3 Medium Density zone to provide additional housing opportunities.







## Regional and District Planning

The NSW State Government establishes strategic policies, requirements and objectives to direct and guide planning for Sydney's expected population change and growth.

In March 2018 the Greater Sydney Commission released *Greater Sydney Region Plan A Metropolis of Three Cities* concurrently with the State Transport and Infrastructure Strategies. The suite of documents provides a strategic and integrated land use planning and infrastructure framework for Greater Sydney. These include:

- Greater Sydney Region Plan A Metropolis of Three Cities
- Five District Plans (North, South, Eastern, Western and Central)
- Future Transport 2056
- State Infrastructure Strategy

### The Greater Sydney Region Plan A Metropolis of Three Cities, 2018

The Greater Sydney Region Plan provides a 40-year vision for managing Sydney's growth. It advocates a city where jobs, services and public spaces are within an easy 30-minute reach of people's homes. It seeks to transform Greater Sydney into a metropolis of three cities - The Western Parkland City, The Central River City and The Eastern Harbour City. Hornsby is within the Eastern Harbour City where the population is projected to grow from 2.4 million people in 2016 to 3.3 million people by 2036. It recommends 5 – 10% Affordable Rental Housing Targets for defined precincts prior to rezoning. A set of 10 directions provide the framework for 38 objectives which include:

- Objective 10: Greater housing supply
- Objective 11: Housing is more diverse and affordable
- Objective 14: A Metropolis of Three Cities – integrated land use and transport

## Hornsby Shire within the Greater Sydney Region's North District

Hornsby Shire is one of nine councils in the Greater Sydney Region's North District.

Within the North District Hornsby Shire shares a boundary with Northern Beaches and Ku-ring-gai councils to the south east and City of Ryde Council to the south.

The Hills Shire and City of Parramatta council areas are to the west and south and form part of the Central District.

### North District Local Councils



Figure 5: North District Local Councils

Source: Greater Sydney Commission North District Plan March 2018



## North District Future Housing Supply

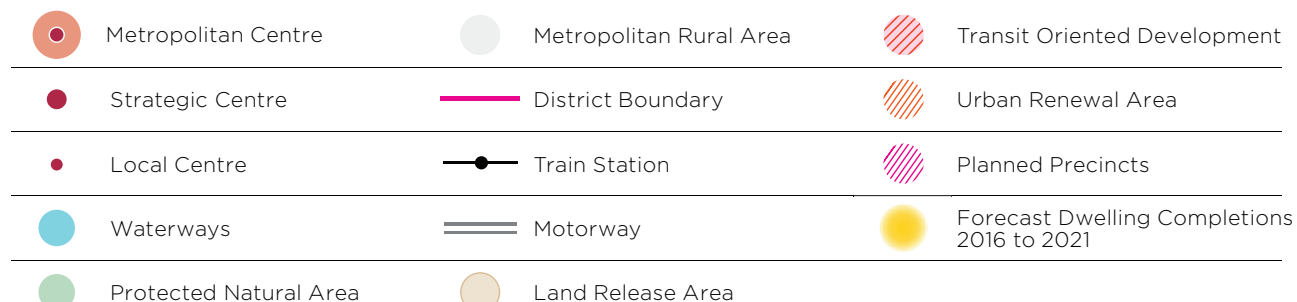
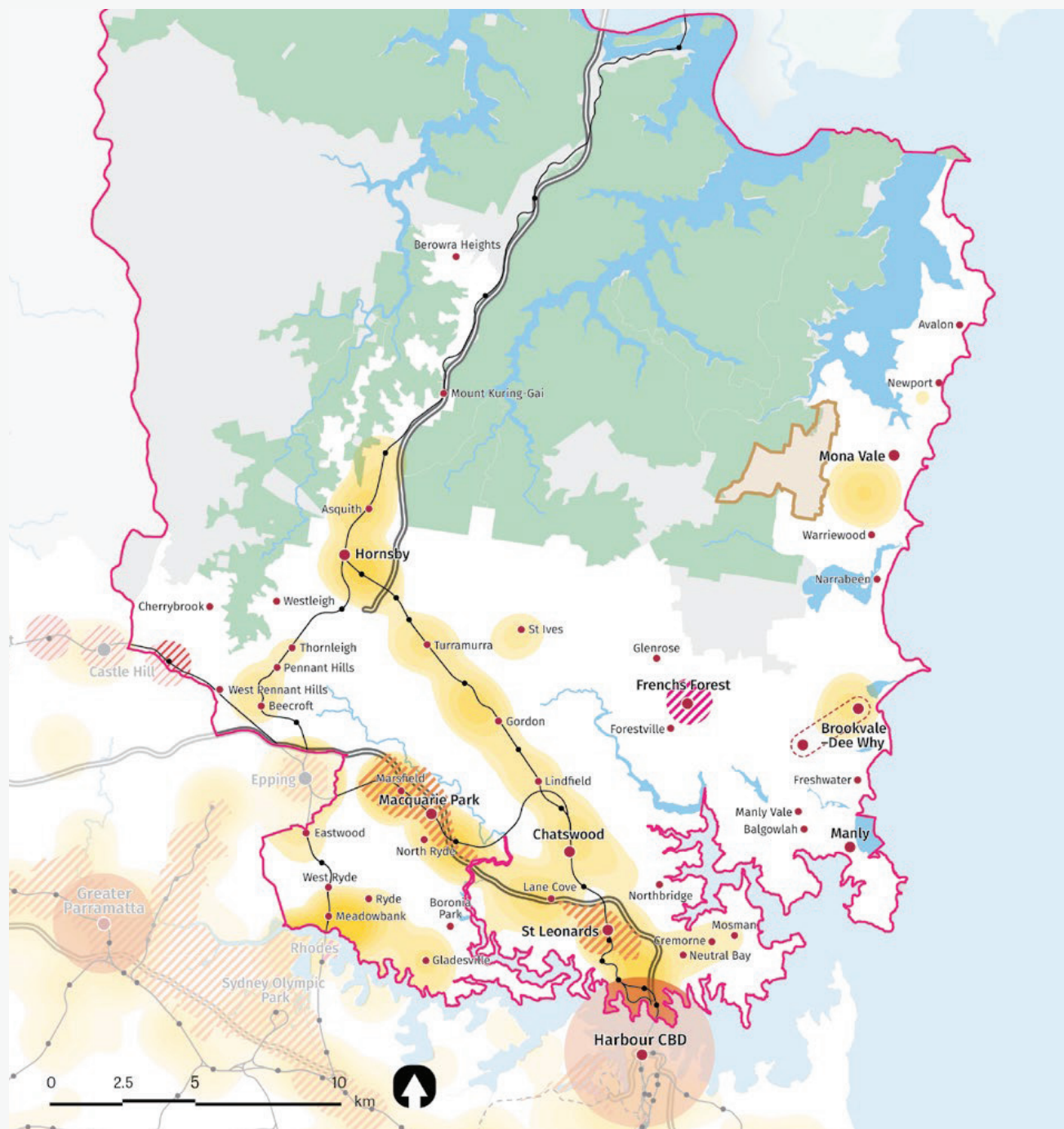


Figure 6: North District Future Housing Supply

Source: Greater Sydney Commission North District Plan March 2018



## The North District Plan, 2018

The North District Plan provides a 20-year plan to achieve the 40-year vision for Greater Sydney. It is a guide for implementing the Greater Sydney Region Plan and acts as a bridge between regional and local planning.

The District Plan highlights that new housing must be in the right places to meet demand for different housing types. It promotes coordination with local infrastructure to create liveable, walkable neighbourhoods with access to services. It states the need to limit urban development to within the Urban Area.

- **Planning Priority N5:** Providing housing supply, choice and affordability, with access to jobs, services and public transport.
- **Planning Priority N12:** Delivering integrated land use and transport planning and a 30-minute city
- **Planning Priority N18:** Better managing rural areas
- **Planning Priority N22:** Adapting to the impacts of urban and natural hazards and climate change
- **Housing strategies:** The North District Plan requires all councils to prepare a new housing strategy that guides short (5 year), medium (6-10 years) and long-term housing targets and growth. All councils need to consider their capacity to contribute to the District's longer-term target of 92,000 dwellings by 2036.
- **Housing targets:** The District Plan's 5-year Housing Supply target (2016-2021) is 25,950 dwellings for the nine local government areas in North District. Hornsby's share of the new dwelling target is 4,350 (16.7%). Hornsby Shire is on track to deliver a net increase of 4,500 dwellings between 2016 and 2021.
- **Key principles:** Housing strategies play an important role in planning for more liveable neighbourhoods and creating capacity for housing in the right locations. They should support the role of centres and investigate opportunities to align with regional and district infrastructure. Key principles include addressing housing need and affordability issues, diversity of dwelling types and alignment with infrastructure.

## Future Transport 2056

The State Government released the Future Transport Strategy alongside the Region and District Plans. The key infrastructure projects within the Shire include Sydney Metro Northwest (Cherrybrook Station) and NorthConnex tunnel linking the M1 and M2 motorways. Major infrastructure projects provide the opportunity to review land use alongside other key objectives and are termed 'city shaping'.

### Sydney Metro Northwest - Cherrybrook Station Precinct

Cherrybrook is one of several new metro stations that opened in May 2019 linking Chatswood to Rouse Hill. The new station represents significant new infrastructure and placemaking opportunities.

Recently, the Minister for Planning and Public Spaces nominated the State-owned land at Cherrybrook Metro Station as a State Significant Precinct.

### NorthConnex

NorthConnex is a nine kilometre tunnel that will link the M1 Pacific Motorway at Wahroonga to the Hills M2 Motorway at West Pennant Hills. The project is due for completion in 2020. It is expected that traffic on Pennant Hills Road and surrounding local road will ease providing future opportunities to revitalise Pennant Hills Town Centre. There are plans for a future review of the Pennant Hills Road corridor that will consider land use, movement and place.



## Local Policy Context

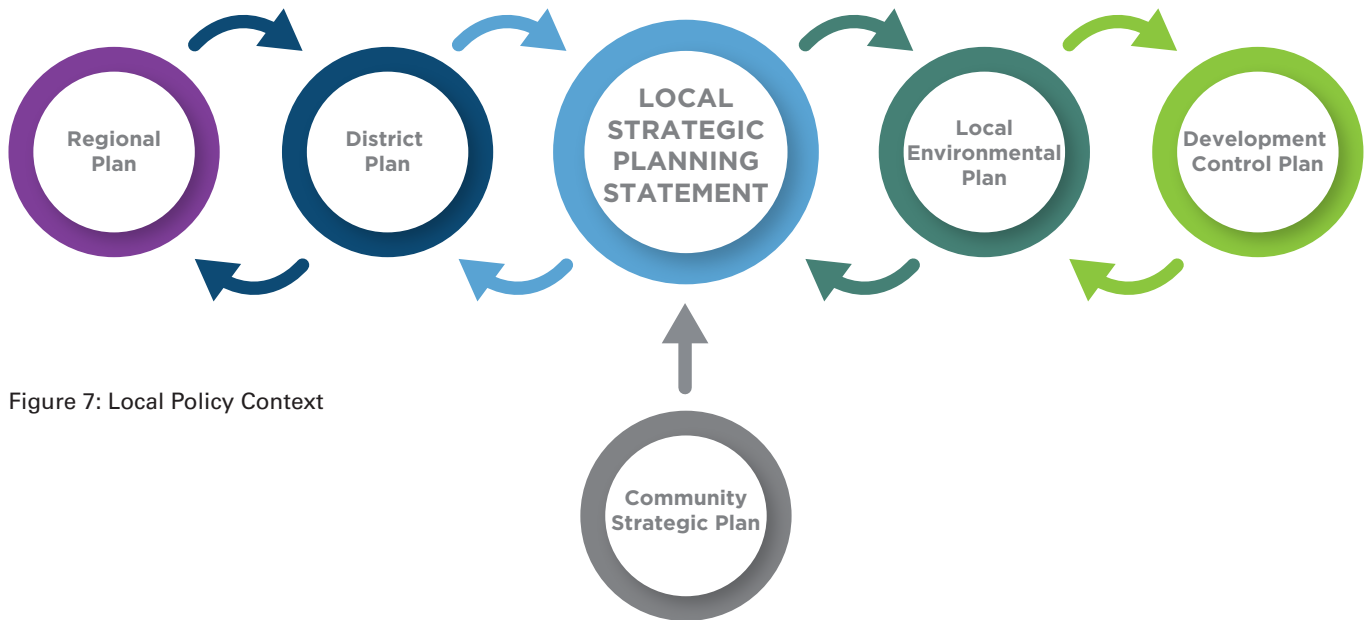


Figure 7: Local Policy Context

This Housing Strategy has been developed to reflect the strategic priorities of Hornsby Council's Community Strategic Plan and the draft Local Strategic Planning Statement.

Council is also currently undertaking a review of several technical studies as part of the Accelerated LEP Review program. This Housing Strategy may be updated to reflect new information as it becomes available.

The key relevant strategic documents are:

- Hornsby Community Strategic Plan 2018
- Hornsby Local Strategic Planning Statement (LSPS)
- Hornsby LEP and Hornsby DCP, 2013
- Hornsby Shire Housing Strategy 2011

### Hornsby Community Strategic Plan 2018 – 2028 – Your Vision Your Future 2028

Council's Community Strategic Plan was developed collaboratively with the community and adopted in June 2018. It identifies the main priorities and aspirations for the future of Hornsby Shire.

The Hornsby community values the characteristics of the area especially the bushland, the sense of space, the sense of community and the village atmosphere of the local shops. Residents want Council to focus effort on

minimising the impact of development and ensuring services such as health care, aged care and transport are aligned to the increasing population needs.

The Action Statement affirms a commitment to implementing initiatives to ensure the Bushland Shire thrives now and in the future. Focus areas include giving people more housing choices, improving affordability alongside sustainability and environmental considerations.

### Local Strategic Planning Statement (LSPS)

The Hornsby LSPS provides a link between the State Government's strategic plans and Council's local land use plans, guidelines and community plans. The LSPS sets a 20-year vision to guide land use planning and growth and will address areas of potential change and areas of special character and importance to the community.

The draft LSPS identifies ten key priorities which include protecting the character of low density neighbourhoods, revitalising the Hornsby Town Centre, protecting natural, built and cultural heritage and building resilience to natural hazards. A key action is to concentrate future housing provision in Hornsby Town Centre.



## Our Key Priorities

- 1. Expanding our tree canopy cover and protecting mature trees to enhance the environmental qualities and character of the bushland shire**
- 2. Protecting the character of our low density neighbourhoods**
- 3. Responding to climate change with an active strategy to reduce carbon emissions and manage energy, waste and water efficiently**
- 4. Improving the quality of architectural design of new development**
- 5. Enhancing, protecting, conserving and promoting our natural, built and cultural heritage**
- 6. Revitalising the Hornsby Town Centre**
- 7. Protecting and enhancing the environmental value and economic productivity of the Metropolitan Rural Lands in the Shire**
- 8. Supporting sustainable economic growth based on the Shire's built and natural assets, infrastructure and locational advantages**
- 9. Building our resilience to natural hazards, including bushfire risk, flooding and storms**
- 10. Promoting the '30-minute City' by improving the walkability, connectivity and accessibility of our centres and neighbourhoods.**

## Hornsby Local Environmental Plan, 2013

The Hornsby Local Environmental Plan (HLEP) 2013 sets out residential development capacity through zoning and density. The Hornsby Development Control Plan (DCP) 2013 guides dwelling mix, sizes and design considerations. These controls guide the types and sizes of housing and design quality. The LEP and DCP translated and enabled the 2011 Housing Strategy. The amendments rezoned precincts near the main North Railway line for medium and high-density housing, mainly in the form of five storey residential flat buildings and two storey townhouses.

## Hornsby Shire Housing Strategy 2011

In 2011 Council finalised the Hornsby Housing Strategy. It identified precincts near train stations and commercial centres to be rezoned for medium and high-density residential development. The strategy was developed in response to the State Government's 2031 target for Hornsby Shire to achieve a mix of 11,000 additional dwellings around centres and public transport.

The precinct-based approach aims to concentrate housing in certain areas to protect environmentally sensitive areas of the Shire and the character of lower density suburbs.

Character statements for the housing precinct areas are contained in the Hornsby Development Control Plan. They are typically five storey residential buildings in landscape settings with underground car parking.

Recent Council data (as at 16 January 2020) highlights that over 3,400 dwellings have been constructed in the housing precincts. Completions have also overtaken the projections in the precincts as at the end of 2019. A further 1,000 dwellings have had development applications approved or submitted. The remaining capacity is estimated to be around 3,000 dwellings. The remaining capacity is likely to be developed at a slower pace than in recent years.

These precincts and their development status are identified in Appendix 2.



## Strategies and Studies

The Accelerated LEP Review program (Figure 9) includes the following projects being undertaken by Council. These studies will inform future updates to the Local Strategic Planning Statement and, where relevant, the housing strategy.

Strategy / Plan	Priorities / Actions	Implications for housing
<b>Affordable Housing Discussion Paper, 2018</b>	Improving housing choice, diversity & affordability. Sets out the Council's overall housing vision and objectives. Further consideration and discussions with the community are planned.	Potential for an affordable housing contributions scheme as part of the Hornsby Town Centre Review.
<b>Environmental Sustainability Strategy</b>  Informed by: <ul style="list-style-type: none"> <li>■ Urban Forest Strategy</li> <li>■ Climate Change Adaption Plan</li> <li>■ Biodiversity Management Plan</li> <li>■ Water Sensitive Hornsby Strategy</li> </ul>	The Strategy will be used to plan our approach to environmentally sustainable action over to the next 20 years and will be the cornerstone to ensure our environment is strong, resilient and adaptable into the future	New homes will need to consider the goals and targets for protection and conservation of our waterways, flora and fauna, reducing emissions, sustainable building design and initiatives to combat urban heat as well as other sustainable living initiatives.
<b>Comprehensive Heritage Study</b>  Phase 1 is complete and has included the preparation of a heritage gap analysis and the Hornsby Heritage Action Plan 2019	Identifies additional initiatives and updates that build on Council's current heritage measures and will help achieve best practice heritage management. Identified actions will help respond to the changing development context, demography & community expectations.	Will inform Council's options, plans and development controls in areas identified for additional housing density or areas to be conserved.
<b>Rural Lands Study</b>	The Study will help Council decide how rural lands will be managed into the future. It will address State Government requirements in the North District Plan to use place-based planning to maintain the values of the rural area and deliver targeted environmental, social and economic outcomes; and to limit urban development to existing urban areas.	Identify strategies to protect the rural, scenic, economic and environmental characteristics specific to different landscape areas throughout the rural lands.
<b>Employment Land Use Study</b>	Provides a strategic framework for supporting sustainable growth that will meet Council's employment targets set by the State Government.	Will identify potential changes in employment areas (e.g. expansion, changes in development standards, zoning) to provide more jobs closer to home for Hornsby residents.
<b>Community and Cultural Facilities Strategic Plan</b>	Sets the long-term direction for community and cultural facilities within Hornsby Shire. The Plan requires updating to reflect current priorities and demographic trends and the loss of territory south of the M2 motorway to the City of Parramatta Council.	Improvements to and provision of new community and cultural facilities required to service the current and future population.
<b>Active Living Strategy</b>	Identifies the recreation and open space needs of the Hornsby community and provides a strategic framework from which to guide and manage future open space and recreation planning for Hornsby Shire.	Improvements to and provision of new open space infrastructure and areas required to service the current and future population.
<b>Hornsby Town Centre Review</b>	Identify opportunities to expand the Centre's economic and employment generating capacity, housing supply, liveability, accessibility, safety, environmental sustainability and amenity through design and landscape outcomes.	Long term housing will be provided in Hornsby Town Centre in a mix of densities to meet the demographic projections.

Figure 8: Projects informing Hornsby's land use strategies



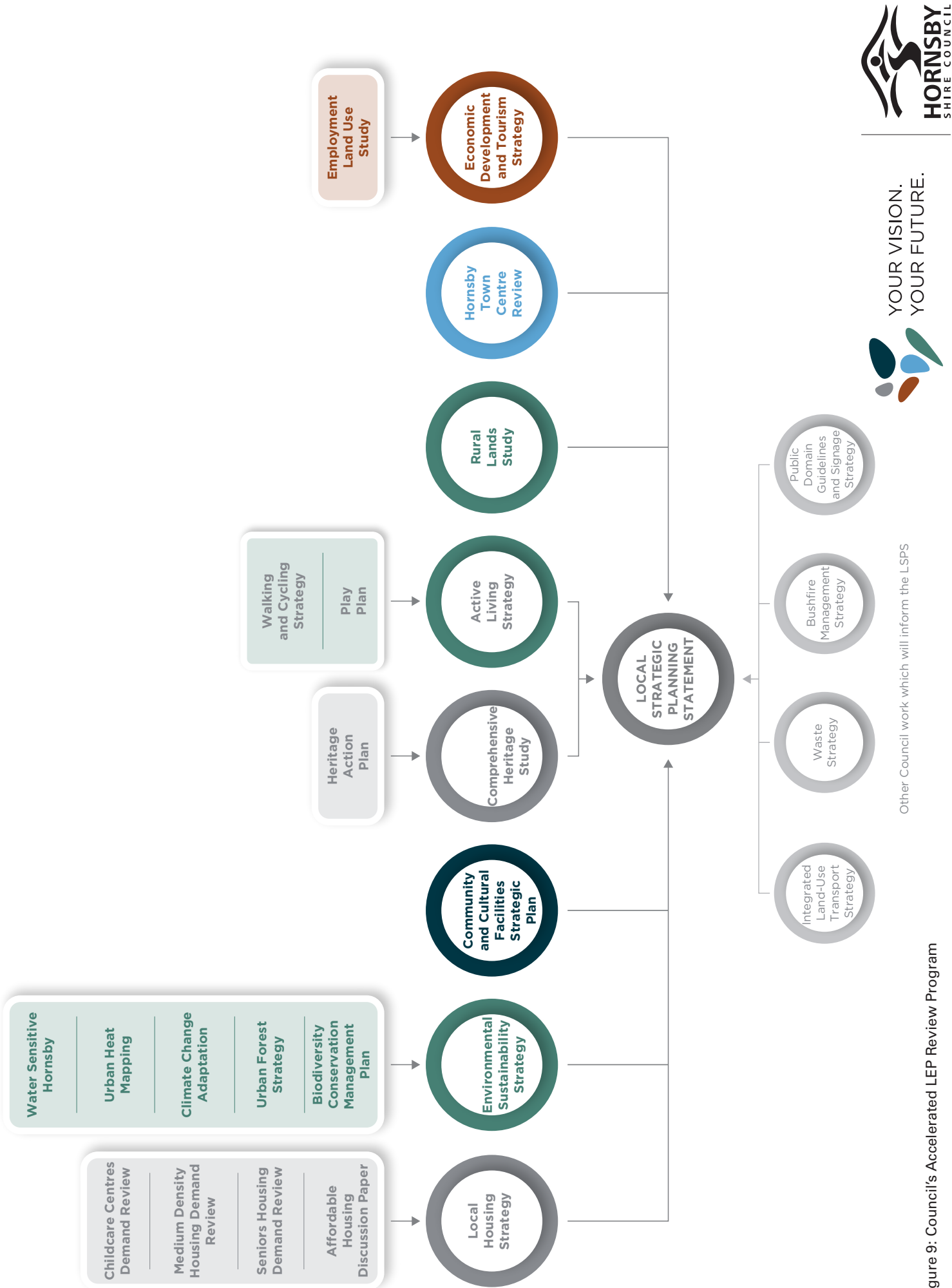


Figure 9: Council's Accelerated LEP Review Program





Image: Berowra Valley





## 1.3 Snapshot of Hornsby

### 1.3.1 Overview

Hornsby Shire is in Sydney's northern suburbs, about 25km from the Sydney CBD. We are known as the 'Bushland Shire' because nearly 70% of our 460 square kilometres is comprised of national parks, major waterways and natural reserves or open rural landscapes. The remainder of the Shire is a mix of rural land (15%), urban areas (10%), and open space (5%).

Our northern boundary extends to Wisemans Ferry following the Hawkesbury River south east past Brooklyn to Cowan Creek then southwards along the boundary with Northern Beaches and Ku-ring-gai Council areas. The City of Ryde and City of Parramatta form the southern boundary. Hornsby shares its western boundary with The Hills Shire along the Old Northern Road.

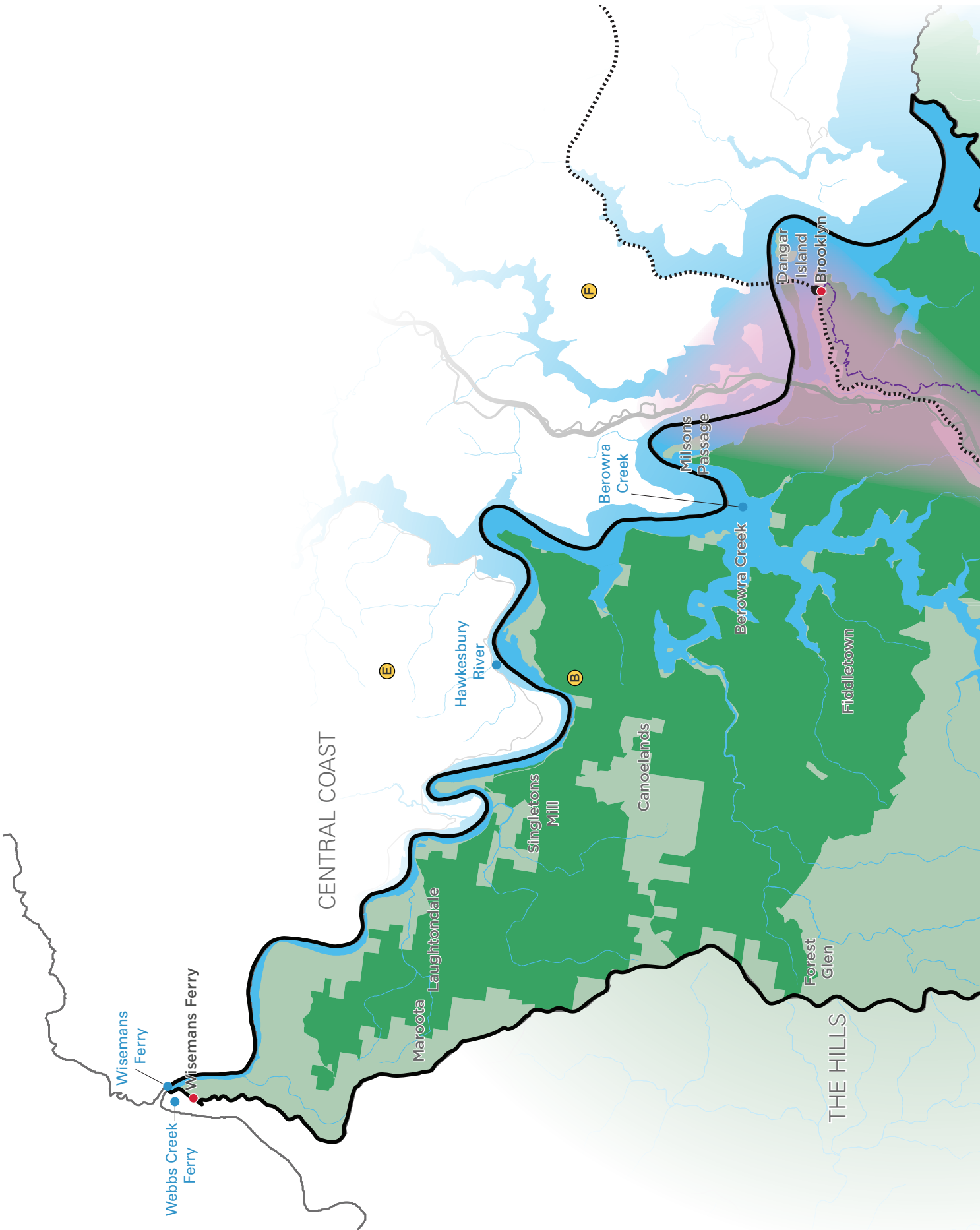
Hornsby Town Centre is a strategic centre in the urbanised southern area with excellent road and rail links making it a popular commuter and employment centre.

“

The Bushland Shire...the place where the city meets the bush

”







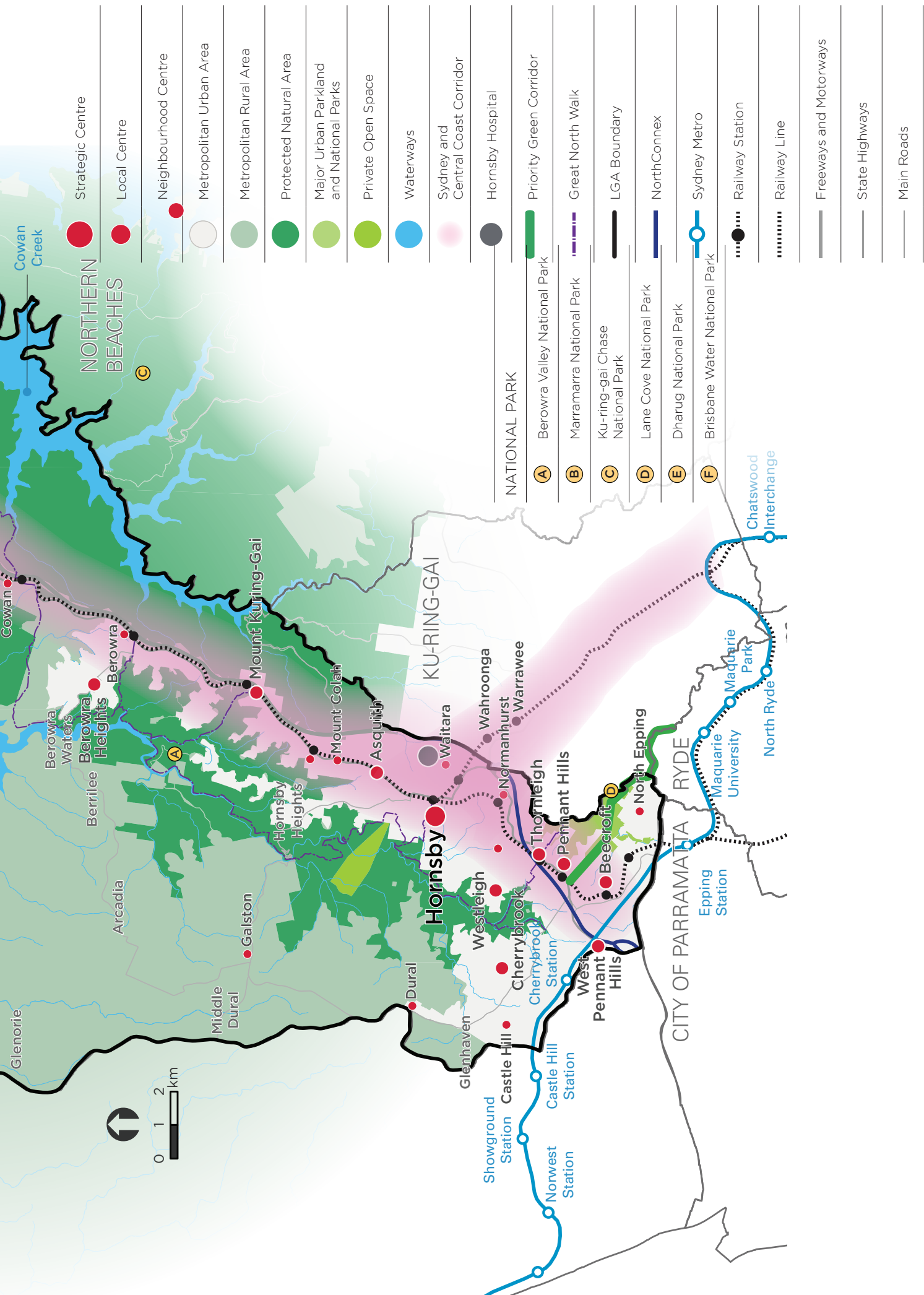


Figure 10: Hornsby in the North District Map



Hornsby has excellent road and rail connections. Hornsby Town Centre is a major junction for the Main North and North Shore rail lines and has good access to the M2. The opening of Metro Northwest's Cherrybrook Station in the western part has significantly improved access to public transport. The NorthConnex link from the M1 Pacific Motorway to the M2 Hill Motorway opens in 2020 and will relocate traffic from Pennant Hills providing significant environmental benefits. A future review of Pennant Hills Road Corridor is planned.

## Local Economy

The three largest industries (based on jobs held by full-time equivalent local workers) in 2018/19 were:

- Health care and social assistance (6,999 full-time equivalent workers or 17.8%)
- Education and training (5,038 full-time equivalent local workers or 12.8%)
- Retail trade (4,649 full-time equivalent local workers or 11.8%).

In June 2019 there were an estimated 50,661 local jobs in Hornsby Shire. This represents a 1.36% increase in jobs from 2018. The growth has been almost exclusively

related to household services reflecting strong population and household growth.

Journey to work data shows that Hornsby Shire residents hold around 48% of local jobs.

## Population and Households

Over the last decade Hornsby's population has grown steadily with a significant spike in 2017 coinciding with the completion of new housing developments. The estimated resident population of Hornsby Shire in June 2018 was 150,752 people, and the population is forecast to increase by an average of 1% per annum to 179,582 in 2036.

The community reflects Sydney's growing diversity with 37% of our residents born overseas. While 92% of the population speak only English or speak it well, 31% speak a language other than English.

A high proportion of Hornsby households own their own home or have a mortgage (73%), with around 18% privately renting and 2% in social housing.

Median family income is higher than in Greater Sydney with around 36% of households receiving a weekly income of \$2,500 or more.

### Annual change in Estimate Resident Population (ERP)

Hornsby Shire

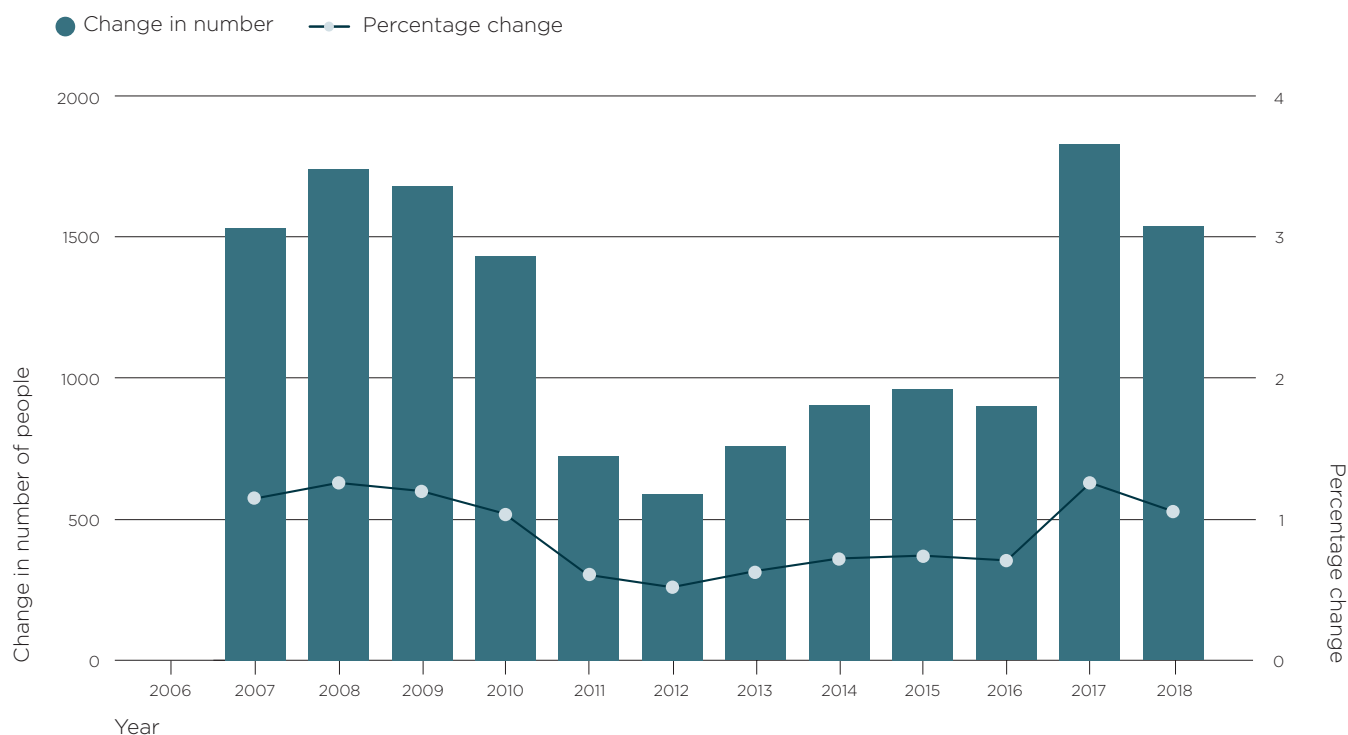


Figure 11: Annual change in Estimated Resident Population (ERP)

Source: Australian Bureau of Statistics, *Regional Population Growth, Australia (3218.0)*.

Compiled and presented by .id the population experts



Hornsby continues to be an attractive location for families with 54% of all households containing children. This reflects availability of larger detached dwellings, high-quality environment, transport links to strong job catchment areas and the high quality and varied school opportunities.

Family households are ageing, and mature family households and emerging empty nesters will continue to increase. The Shire's population of older people is above the Sydney average reflecting the growth of Hornsby as a major provider of aged care and seniors housing. State Government projections of the +85 age group is above Council's projections. The ability for Hornsby to respond to the needs and preferences of its 65+ population and a shifting government emphasis on 'home care' is a key issue. Therefore, Council has recently prepared a separate Seniors Housing Demand and Supply Review.

## Housing

Between 2011 and 2016 the stock of medium and high-density dwellings has grown, while the overall stock of detached dwellings has fallen reflecting development of housing in the new precinct areas. However, around 72% of the dwelling stock in 2016 remained detached houses. Neighbouring councils such as Ku-ring-gai and The Hills have a similarly high proportion of detached dwellings.

Around 7.4% of the Hornsby Shire's households were experiencing housing stress compared to 11.8% in Greater Sydney (2016).

Lower income households who are paying more than 30% of their household income to meet their housing costs are generally considered to be in housing stress

- Very Low Incomes is below 50% of the Census Median Equivalised Income.
- Low Incomes is 50% - 80% of the Census Median Equivalised Income.
- Moderate Incomes is 80% - 120% of the Census Median Equivalised Income.





## Hornsby Snapshot Statistics

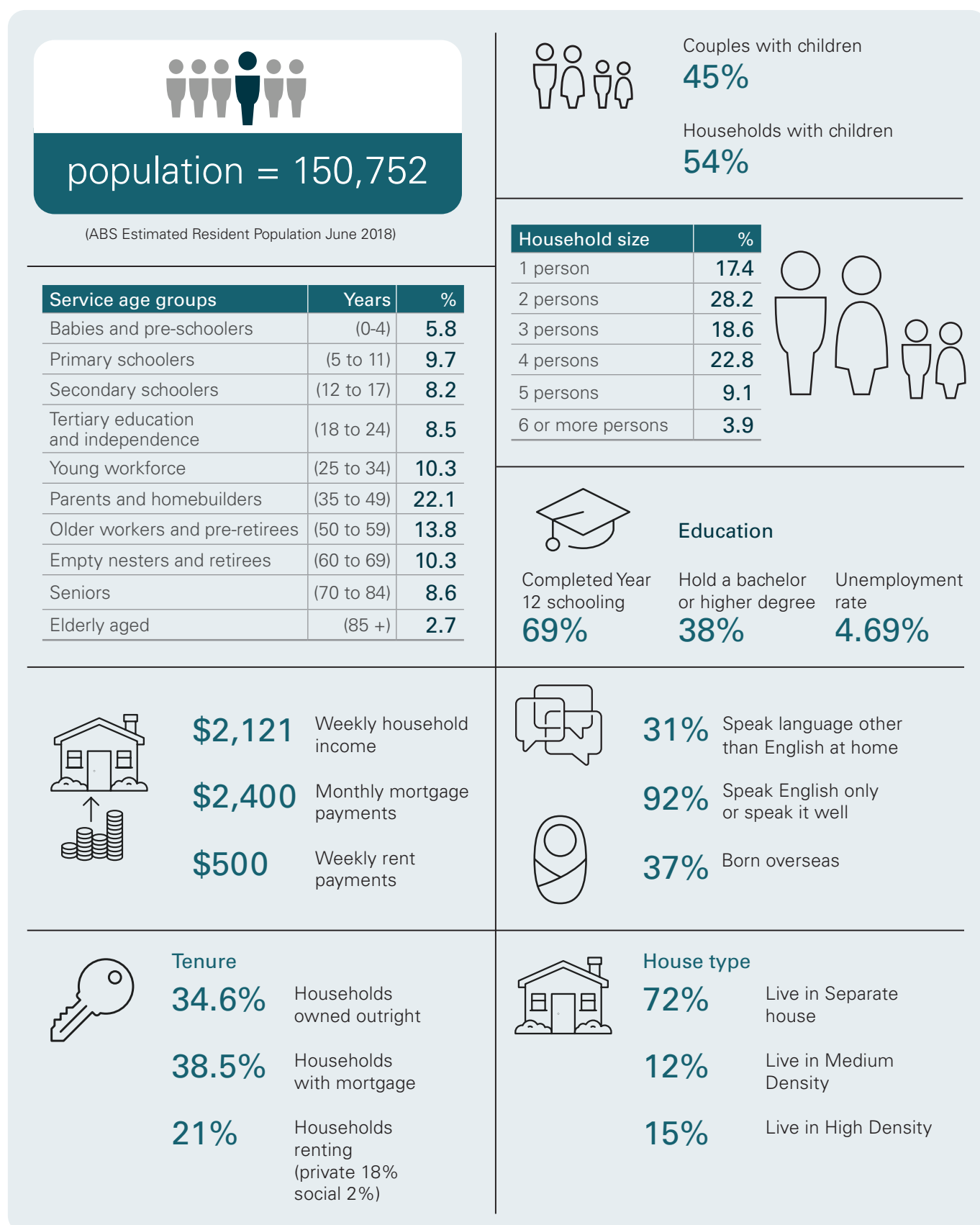


Figure 12: Hornsby Snapshot Statistics



## Hornsby Shire Land Use Statistics

Hornsby Shire	
Land Area	460 square kilometres
Natural Protected Areas	70%
Rural Land	15%
Open Space	5%
Urban Areas	10%

Figure 13: Hornsby Shire Land Use Statistics

Source: Hornsby Shire Council GIS Statistics

Urban Areas		
Zone	Percentage	Hectares
R2 Low Density	92%	4,230 ha
R3 Medium Density	1%	50 ha
R4 High Density	2%	101 ha
Other	5%	219 ha

Figure 14: Hornsby Shire Urban Areas Statistics

Source: Hornsby Shire Council GIS Statistics



## 1.3.2 Character

The District Plan advocates for housing strategies to be based on a place-based approach.

### **Our Local Character**

Hornsby Shire is varied and diverse and many areas have a unique rural, natural or urban local character. Bushland, open space, heritage, high quality design and landscaped settings are core values of character.

We have a rich history from the original inhabitants - the Darkinjung, Dharug and Kuringgai Aboriginal people. There are over 200 known Aboriginal heritage sites including rock shelters, middens and engravings.

The Great North Road is a historical attraction built by convicts between 1826 and 1834 and remains an important transport route for the Shire.



Image: © Damian Shaw Photography - Crosslands



### Our natural environment

Our natural environment is one of the hallmarks of Hornsby Shire. We are known as the Bushland Shire not only for our abundant bushland but for the biodiversity in flora and fauna, waterways and rural areas. The topography is characterised by steep valleys and ridges of Hawkesbury Sandstone, the waterways of the lower Hawkesbury River, and natural vegetation. Our bushland and waterways act as a natural constraint for urban development, with bushland covering over 2,000 hectares of the Shire. It also presents a significant bushfire risk to a large portion of our population.

### The Shire's residential areas

The Shire's residential areas are concentrated in the southern part of the Shire known as the Metropolitan Urban Area. This extends north along the Pacific Highway and North Shore rail corridor. Smaller villages and neighbourhood centres with significant tree canopy are located throughout the large Metropolitan Rural Area. Many of the residential areas are affected by urban/rural interface issues such as bushfire risk, biodiversity, impact on waterways which require a tailored approach. Like the rest of Sydney, Hornsby Shire has been under substantial pressure to accommodate a rapidly growing population. High levels of development have occurred in housing precincts in recent years which has resulted in the transformation of areas along the Pacific Highway such as Asquith and Mount Colah.

Council is very keen to contribute to the State Government's precinct planning process for the area surrounding Cherrybrook Station. The recent Place Score survey of the local community revealed that people valued the natural and physical environment, feeling of community and safety and the access to services. They wanted more housing choice and affordability and community facilities.

### The LSPS

The LSPS emphasises the need to protect and enhance the Shire's natural, built and cultural heritage. Several strategies are being undertaken to provide a clear framework to guide future land use planning as part of the Accelerated LEP Review program.

## Defining Local Character

The Shire is made up of different places, each with their own distinct character. Local character is what makes people feel connected to a place and includes both what people can see – buildings, trees, parks and the like, and less tangible aspects such as safety, accessibility and access to opportunities.

Recognising what makes a place special is an important first step in helping to conserve and enhance what people value. It also provides an opportunity to identify desired character and how this can be integrated into the planning system.

The Hornsby Development Control Plan provides character statements for Council's heritage conservation areas and descriptions of desired future character for other areas. However, there is no single document providing a comprehensive overview of local character for our residential areas. Council is considering the need for a comprehensive local character review that would help to guide Council's future approach to delivering housing in the Shire. It would inform any future updates to the HLEP and HDCEP.

Respecting local character does not prohibit new development in our urban areas. New development however must be design-led and build on valued characteristics of individual neighbourhoods and place. Good design that is place-based contributes to evolving and future character and setting.



## 1.4 Vision

Council's Housing Vision has been informed by State Government requirements, Council goals and the Community Strategic Plan, 2018.

“ Support community well-being through the provision of housing that is affordable and appropriate to household needs and preferences in terms of choice and location, while protecting and enhancing local surroundings and the natural environment. ”

- Hornsby Shire's Housing Vision





## 1.5 Stakeholder views

Our community has helped to shape this document through their comments on recent strategies, including the exhibition of the Local Strategic Planning Statement (LSPS). A summary of housing related issues raised by our local community is outlined below.

### Hornsby Shire Local Strategic Planning Statement

Council's draft Local Strategic Planning Statement (LSPS) 2018-2028 was exhibited during August to October 2019. More than 1,900 community members have contributed their views on the Council's 20-year planning strategy through extensive engagement activities including a Future Living Summit, Youth Future Forum, online survey, submissions, focus groups and targeted consultation in local neighbourhoods. The Hornsby LSPS – Community Engagement Outcomes Report, 2019 provides a detailed overview of the responses received.

The housing topic resulted in complex and divisive views from the community. Opinions on the planning for future housing provision in Hornsby Shire fell into three distinct groups.

1. Those wishing to see a complete stop to all new development (38% of online survey respondents were against greater housing choice)
2. Those wishing to see some diversity in housing but contained in Hornsby Town Centre to protect the character of lower density areas (73% of Summit respondents in the voting activity supported the concentrated housing model)
3. Those advocating more housing diversity, including affordable housing, throughout the Shire (37% of respondents supported greater housing choice, with strong support from respondents in Cherrybrook and Beecroft and key agencies).

Other topic areas generated relevant comments, these included: strong support for the Hornsby Town Centre revitalisation project, the need for better infrastructure; the need to protect the character of low-density areas; the need for stronger commitment to affordable housing, medium density housing and housing for an ageing population. Concerns were also raised about the effects of climate change and natural hazard risks, retaining the Shire's rural character, rural seniors housing. There was general support for promoting walkable neighbourhoods and a 30-minute city to reduce car dependency.

### Affordable Housing Discussion Paper, 2018

Feedback on the Affordable Housing Discussion Paper consultation process was gathered during 2018 and 2019. This included submissions, community and industry stakeholder focus groups, telephone interviews, emails and online surveys. It highlighted that many people can relate to housing affordability issues including rental or mortgage stress. However, there is some confusion about the difference between social housing and affordable rental housing. Further conversations with the community are needed. Changes to SEPP 70 mean that there is potential for an affordable housing contribution scheme in Hornsby Town Centre.

### Hornsby Shire Community Strategic Plan

Council's Community Strategic Plan (CSP) 2018-2028 was adopted in June 2018. Your Vision | Your Future 2028 outlines the aspirations for the future and represents a strategy to achieve those aspirations. It gives a timely and clear indication of community views and values, which include:

- Our community values the natural environment, the sense of belonging to a community and overall well-being. Many would like to see less development in the future in general and a balance of better planning for developments with protection of the environment, bush and green spaces.
- Housing precincts that now permit 5-storey and townhouse development have caused concern to some local communities about the changing character of their area.

Our CSP highlights the key focus areas including giving people housing choices, valuing green spaces and environment, living with bushfire risk and a stronger economy.



## Priorities

Creating capacity for new housing in the right locations was the impetus for Council's 2011 Housing Strategy, which is still relevant today and will continue to deliver housing beyond 2026. The housing precincts identified in 2011 concentrate development close to transport and services.

The Shire's Local Strategic Planning Statement identifies seven liveable priorities. Three of these priorities highlight the principles the Shire will follow in planning for new housing (LP.1, LP.2 and LP.6). The LSPS also highlights specific housing principles for the Shire. Both are provided in table 3 below.

### Hornsby Local Strategic Planning Statement Liveable Priorities and Housing Principles

Issue	Hornsby's Liveable Priorities
1. Protecting the character of our low density neighbourhoods	<ul style="list-style-type: none"> <li>■ Protecting the predominant character of our lower density suburbs with large lots, an established tree canopy and a bushland or garden setting</li> </ul>
2. Promoting design excellence for new housing	<ul style="list-style-type: none"> <li>■ Protecting lower density suburbs and environmentally constrained areas from incompatible development.</li> <li>■ Protecting our rural areas from inappropriate Seniors Housing development</li> <li>■ Providing housing choice, diversity and affordability</li> </ul>
3. Supporting the development of community and cultural facilities that will adequately service our current and future community	<ul style="list-style-type: none"> <li>■ Providing affordable housing for local residents (e.g. key workers, single parent households, the elderly and disabled)</li> <li>■ Capturing value for direct community benefit</li> <li>■ Staging the provision of future housing, with the initial focus being within a revitalised Hornsby Town Centre</li> </ul>
4. Aligning the delivery of local infrastructure and public domain improvements with current and future growth	<p>In considering areas for future housing in the longer term, there will be a focus on creating great places, rejuvenating areas and providing diverse housing choice, whilst avoiding the following areas:</p>
5. Protecting, conserving and promoting our natural, built and cultural heritage	<ul style="list-style-type: none"> <li>■ Heritage conservation areas</li> <li>■ Areas with established tree canopy</li> <li>■ Areas with biodiversity and environmental value</li> <li>■ Areas that are bush fire prone with high evacuation risk</li> </ul>
6. Providing housing in the right locations that meets the needs of our community with regard to housing type and mix, design, sustainability, affordability and safety.	<ul style="list-style-type: none"> <li>■ Areas at high risk of flooding and inundation</li> <li>■ Areas with limited transport, waste, water and road infrastructure</li> <li>■ Areas with steep topography</li> </ul>
7. Promoting the arts, creative industries and temporary uses as well as the night-time economy.	

Figure 15: Hornsby Local Strategic Planning Statement Liveable Priorities and Housing Principles



## Section 2 The Evidence

“Trends suggest that the Shire will continue to be attractive to families”

This section establishes where housing supply is adequate and where there are gaps by addressing the following components.

- Demographic indicators of social and economic factors
- Housing demand trends and diversity
- Housing supply trends and diversity
- Land use opportunities and constraints.



## 2.1 Demographic Summary

The population is growing on average by 1% per annum

A full analysis of the demographic information has been provided at Appendix 1 using data from the 2016 census and the Hornsby Shire Population Projections Report, 2016-2036 (i.d the Population Experts). Where relevant the DPIE projections have been referenced.

A summary of Hornsby Shire's current demographic profile is provided in Section 1.3 Hornsby Snapshot.

A summary of Hornsby Shire's projected demographic profile is provided below.

### Forecast Population 2016-2036 Hornsby Shire

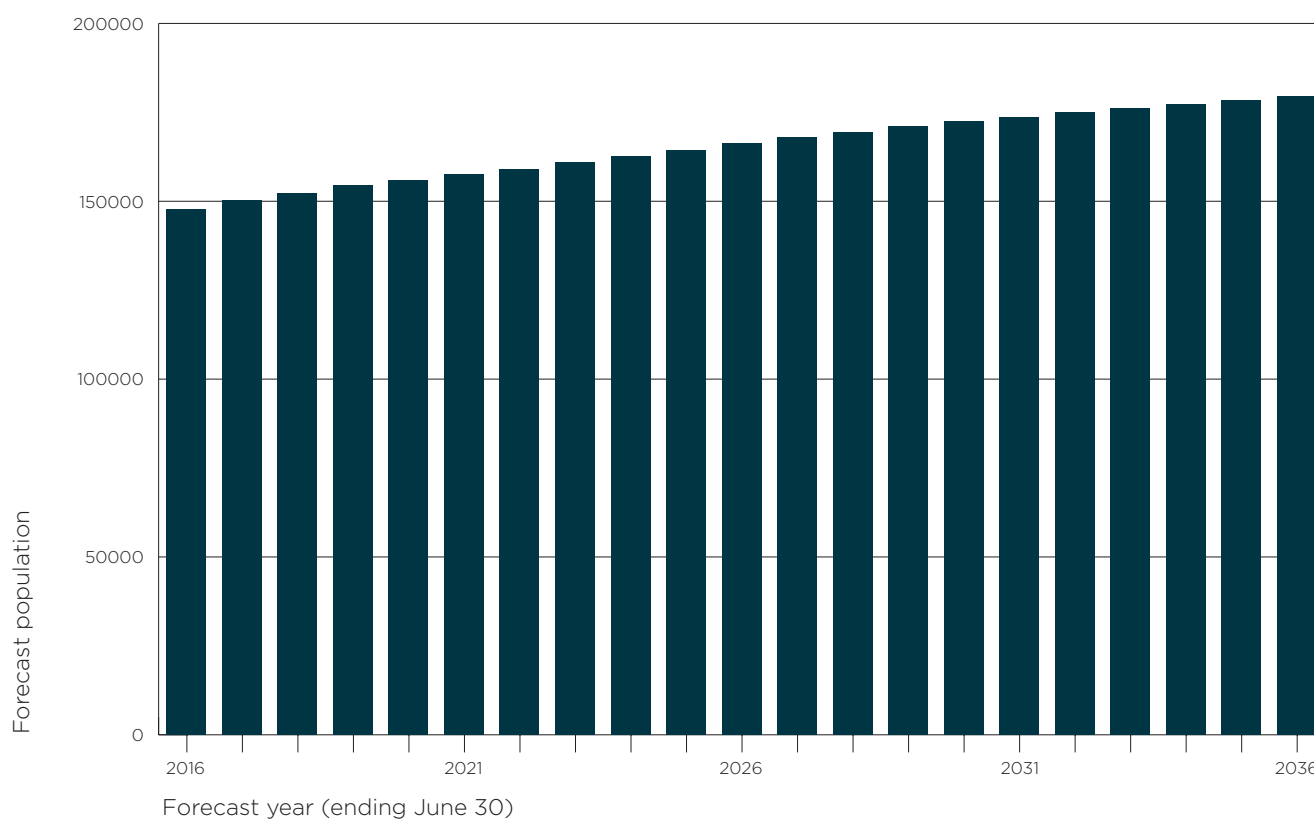
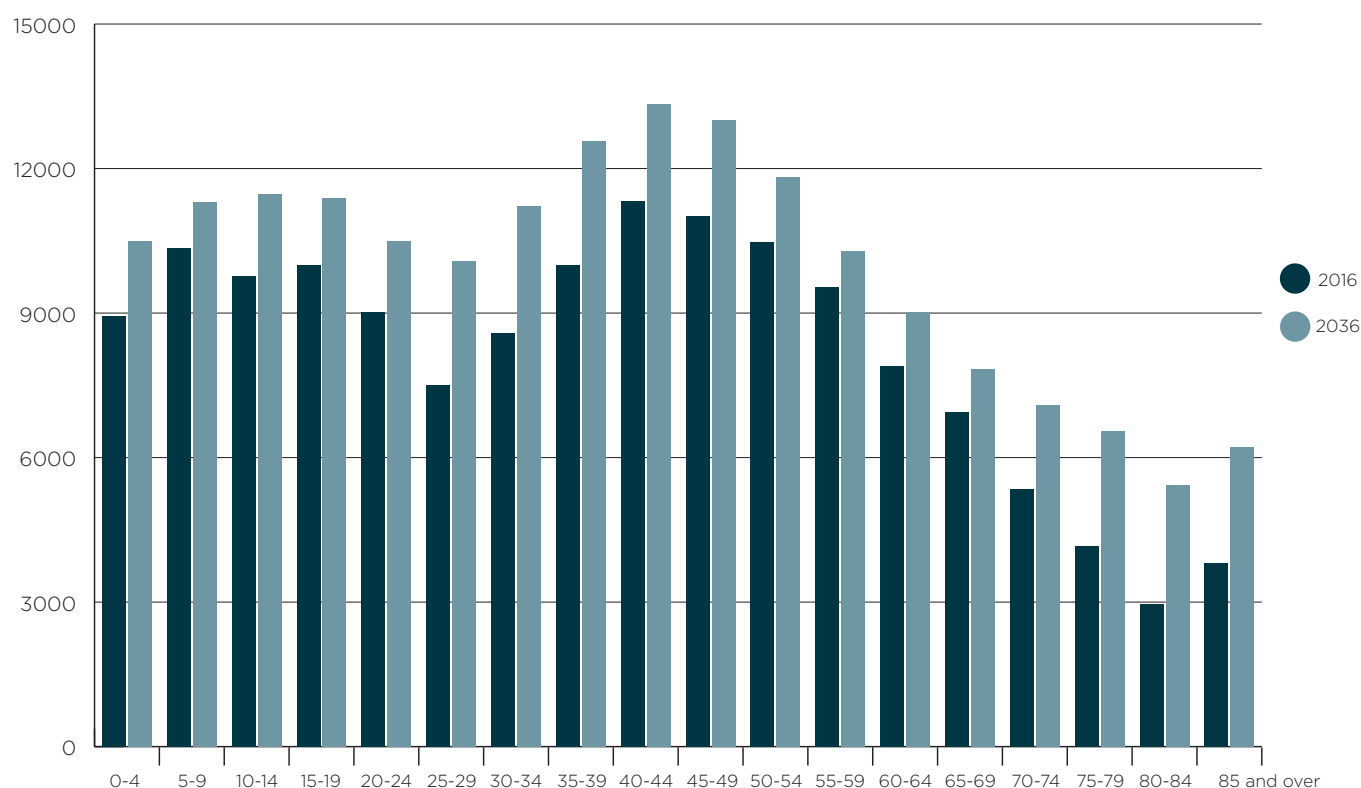


Figure 16: Forecast Population 2016-2036

Source: i.d the population experts, Hornsby Shire Forecasts 2019



## Age structure, Hornsby Shire 2016-2036



**Figure 17: Age Structure, Hornsby Shire 2016-2036**

Source: .id the population experts, Hornsby Shire Forecasts 2019

Net population increases are expected in all age groups to 2036.

Important population trends between 2016 and 2036 which will have implications for the provision of State and local services include:

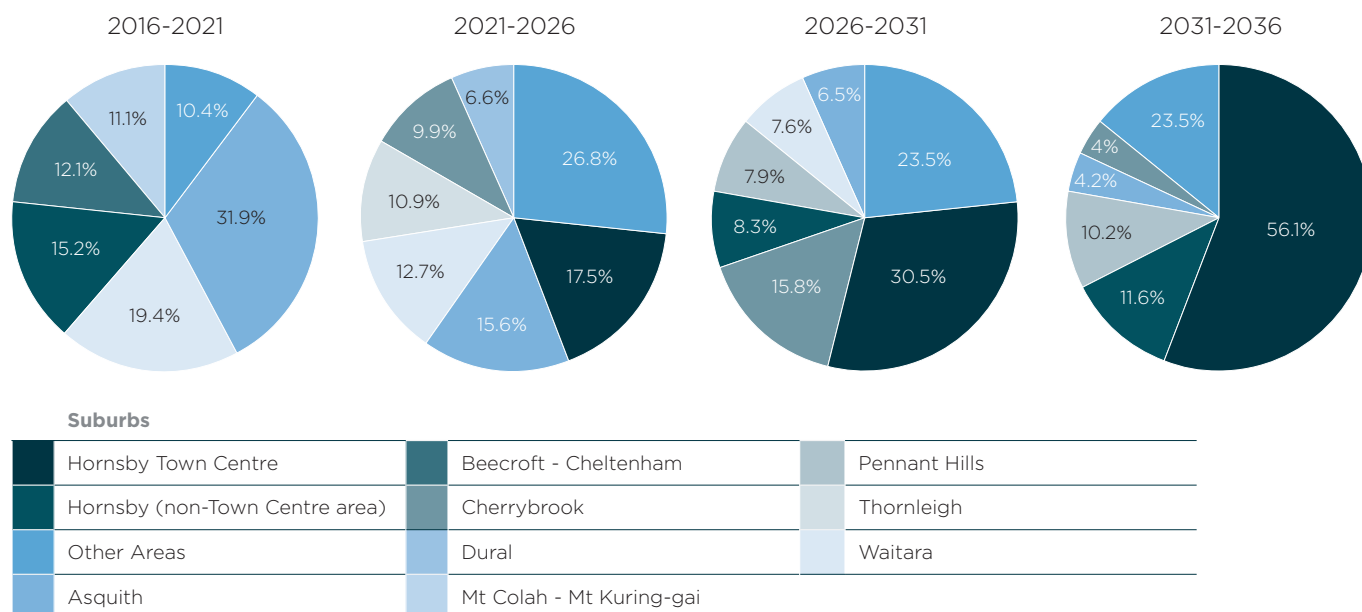
- 30 To 34 age group will see the largest increase in persons - 2,622 persons. This is closely followed by the 25 to 29 age group (2,578 persons) and the 35 to 39 age group (2,570 persons). These combined groups (25 to 39) will account for 18.8% Of the population in 2036 or 33,867 persons.
- Young children: there will be an additional 1,554 children aged 0-4 years.
- School age children: there will be an additional 942 children aged 5 to 9 years; an additional 1,710 children aged 10 to 14 years and an additional 1,392 children aged 14 to 19 years. This group will comprise a smaller share of the population.
- Retirees: low growth in the 50-69 age group
- Elderly population (+85 years): predicted to increase from 2.6 % To 3.5% Over 20 years. This equates to an increase of 2,420 persons.
- Aged care residents: predicted to increase by 36.56% (679 Persons). From 1,860 persons in 2016 to 2,540 persons in 2036.



## Population Growth by Area

Between 2016-2021 population growth will be highest in Waitara and Asquith. In the medium to longer term Hornsby Town Centre and surrounds and Cherrybrook will be the focus of population growth.

### Assumed Share of population growth by suburb by period



**Figure 18: Share of Population Growth by Suburb by Period**

Source: .id the population experts, Hornsby Shire Forecasts 2019



## 2.2 Housing Demand

This section analyses housing demand in Hornsby Shire including market preferences. It identifies the amount and type of housing needed to support the predicted population and household growth to 2036.

### Underlying Demand

The underlying demand is the theoretical need for housing based on demographic projections which include population projections and past trends in household formation, including migration.

The State Government implied dwelling need based from 2016-2041 is identified as 14,476 dwellings. The implied dwelling projections do not include a 2016-2036 figure (which would be lower) for Greater Sydney local government areas.

### Effective Demand

The effective demand is the size, type and location of dwellings that people are willing and able to buy and rent. It is influenced by wider market influences and other factors, including:

- Desirability of the area
- Affordability – reflecting houses prices and income levels
- Proximity to employment and local services
- Access to public transport and infrastructure
- Land values, taxes and interest rates





## Factors influencing housing supply, demand and affordability

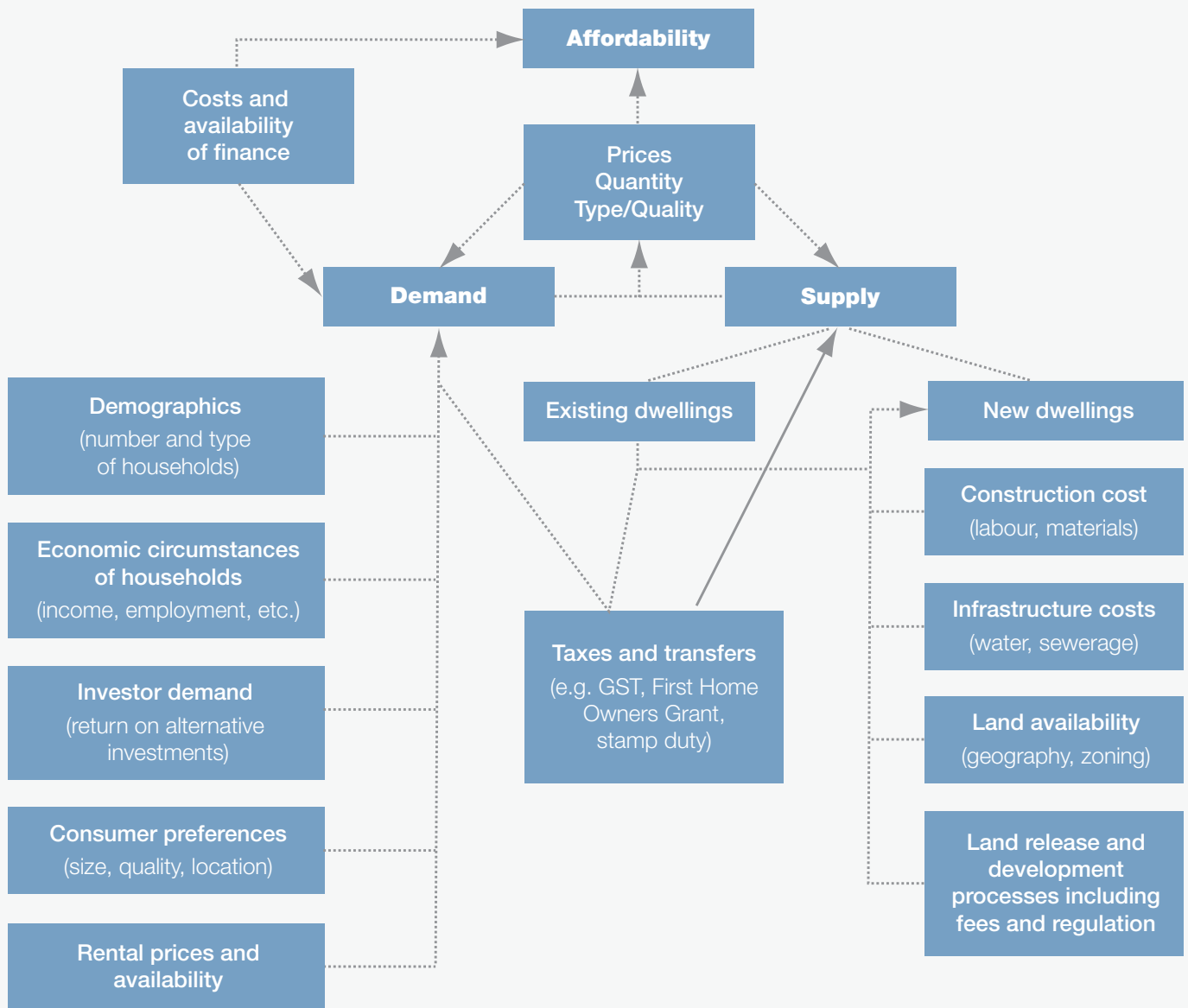


Figure 19: Factors influencing housing supply, demand and affordability

Source: National Housing Supply Council, 2nd State of Supply Report, 2010, Australian Government



## Dwelling Structure by Household Composition

Existing dwelling structure is predominantly separate houses. The following chart highlights that separate dwellings are the dominant type of dwelling for all household types in 2016 – including 49% of lone person households. Over 83% of couple family with children live in a separate house as well as nearly 75% of couple family with no children.

## Projected Dwelling Demand

The implied dwelling need based on State Government projections to 2041 is 14,476 additional dwellings. The projected dwelling demand prepared by .id the Population Experts is for the period to 2036 and takes into consideration future proposed land use. Including assumptions for the development of Hornsby Town Centre and Cherrybrook Station precinct (Government Land), this highlights that the number of dwellings in the Shire will increase by 14,879 to 66,631 dwellings in 2036.

### Dwelling Structure by Household Composition and Family Composition

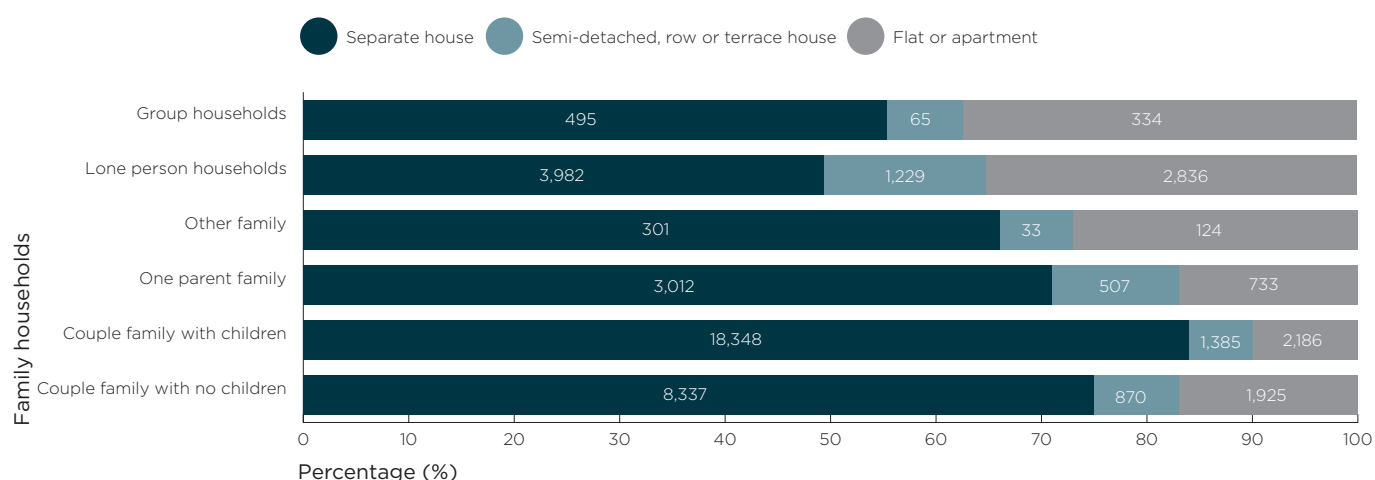


Figure 20: Dwelling Structure by Household Composition and Family Composition

Source: Australian Bureau Of Statistics 2016 Census of Population and Housing

### Hornsby Shire forecast population, households and dwellings

	Forecast year			Change
	2016	2026	2036	2016-2036
<b>Population</b>	147,661	166,158	179,582	31,921
<b>Households</b>	49,867	57,750	64,152	14,285
<b>Average household size</b>	2.91	2.82	2.75	-0.16
<b>Hornsby residents aged 70+ in aged care</b>	1,858	2,537	2,537	679
<b>Dwellings</b>	51,752	59,987	66,631	14,879

Table 21: Hornsby Shire Forecast Population, Households and Dwellings

Source: .id the population experts, Hornsby Shire Forecasts 2019



## Forecast Population, Households and Average Household Size

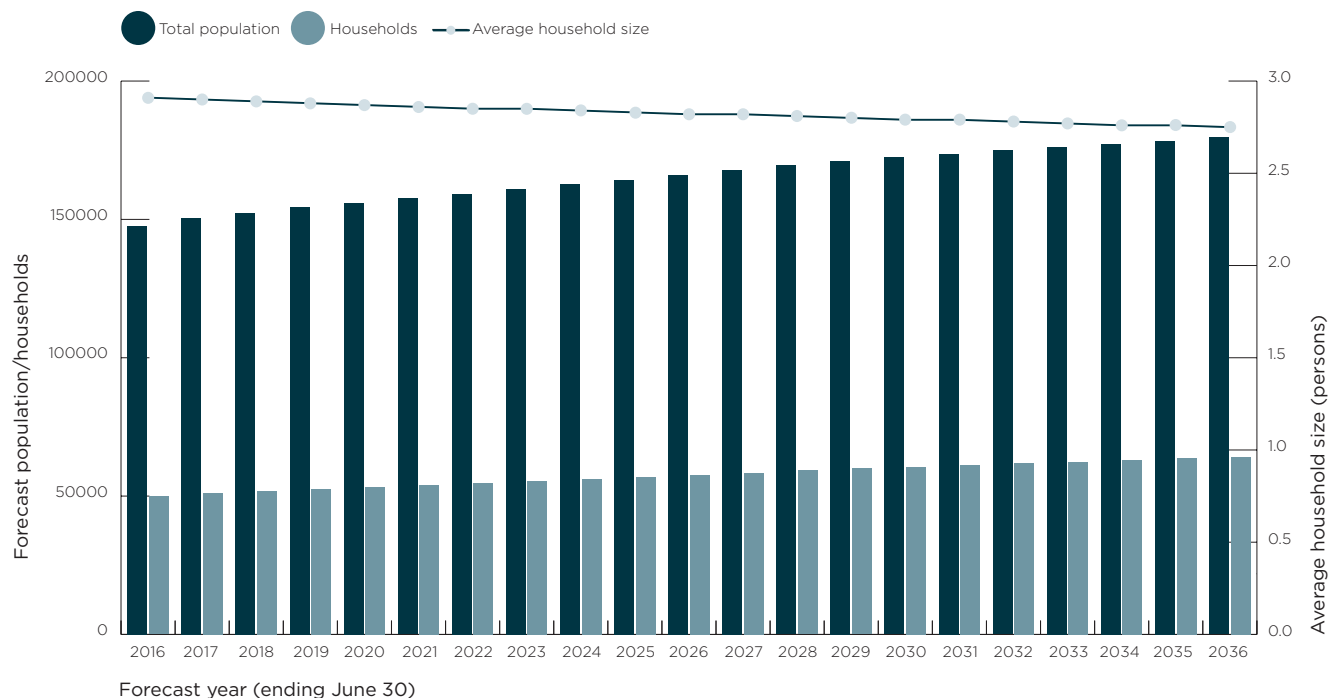


Figure 22: Forecast Population, Households and Average Household Size

Source: .id the population experts, Hornsby Shire Forecasts 2019

## Forecast Household Types

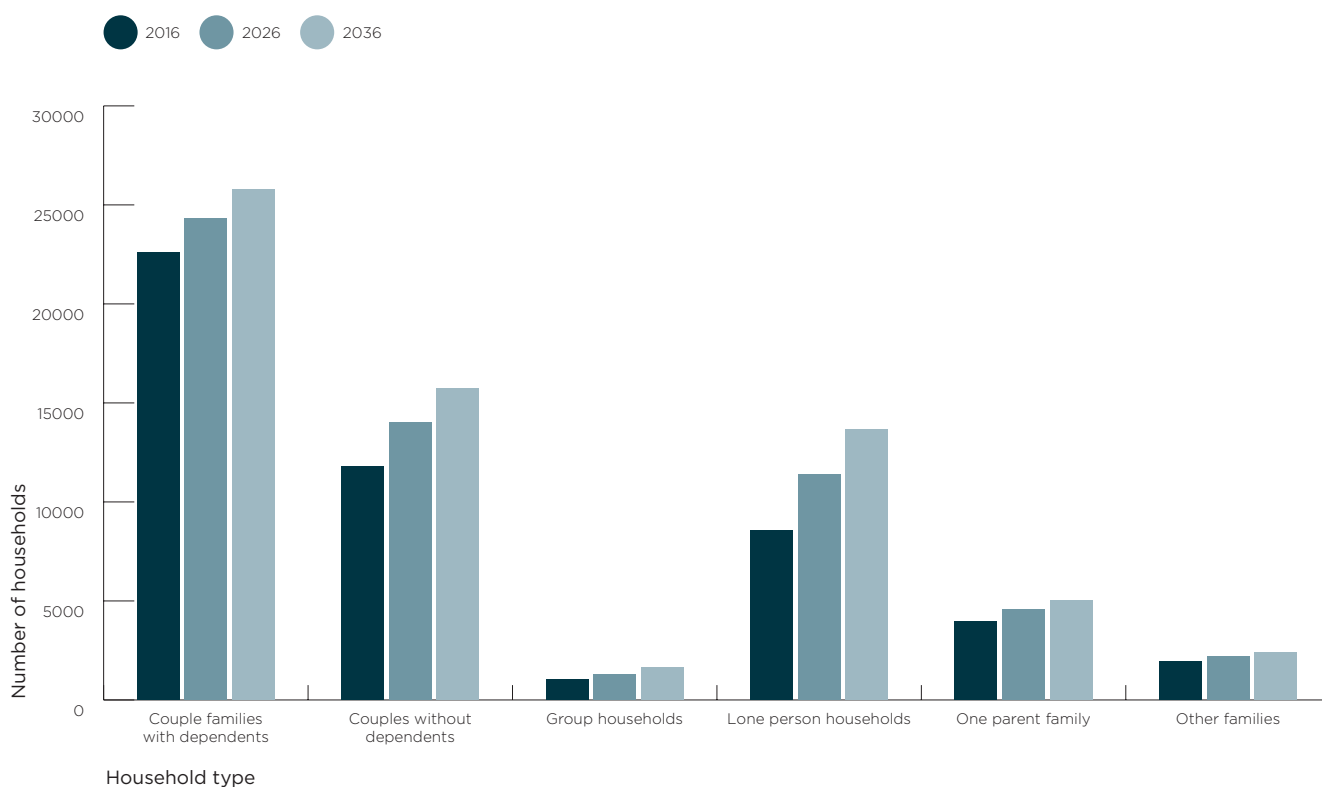


Figure 23: Forecast Household Types

Source: .id the population experts, Hornsby Shire Forecasts 2019



Figures 21 and 22 highlight a decreasing average household size alongside continued population growth. Consequently, there will be a corresponding demand for smaller dwellings.

Figure 23 highlights the growth in all household types. The most significant change will be the growth in lone person households, which is likely to increase by 5,100 households up to 2036. Around 56% of the growth in lone person households will be seen by 2026 (2,835). By 2036 lone person households will comprise 21.3% of all households. It is expected that a significant proportion of the lone person households will be older – particularly the over 85 age group.

## Dwellings for Future Household Needs

Family households are likely to require larger apartments, more affordable medium density options (such as town houses) or detached dwellings.

Trends suggest that the Shire will continue to be attractive to families. By 2036 Couple families with dependents (the dominant household type) will reach 25,756 households (+25%) an increase of over 3,900 households.

Growth for this household group is expected to be concentrated in Asquith, Waitara and Hornsby Town Centre – see Figure 18. The proposed dwellings stock in these areas will be predominantly high-density. Families are likely to require larger apartments which suggests that more 3-bedroom apartments may be necessary in the future. The majority of apartments (69%) that have been constructed in the new medium and high density areas have been 2-bedroom.





## Forecast household types map – Couples with Dependents

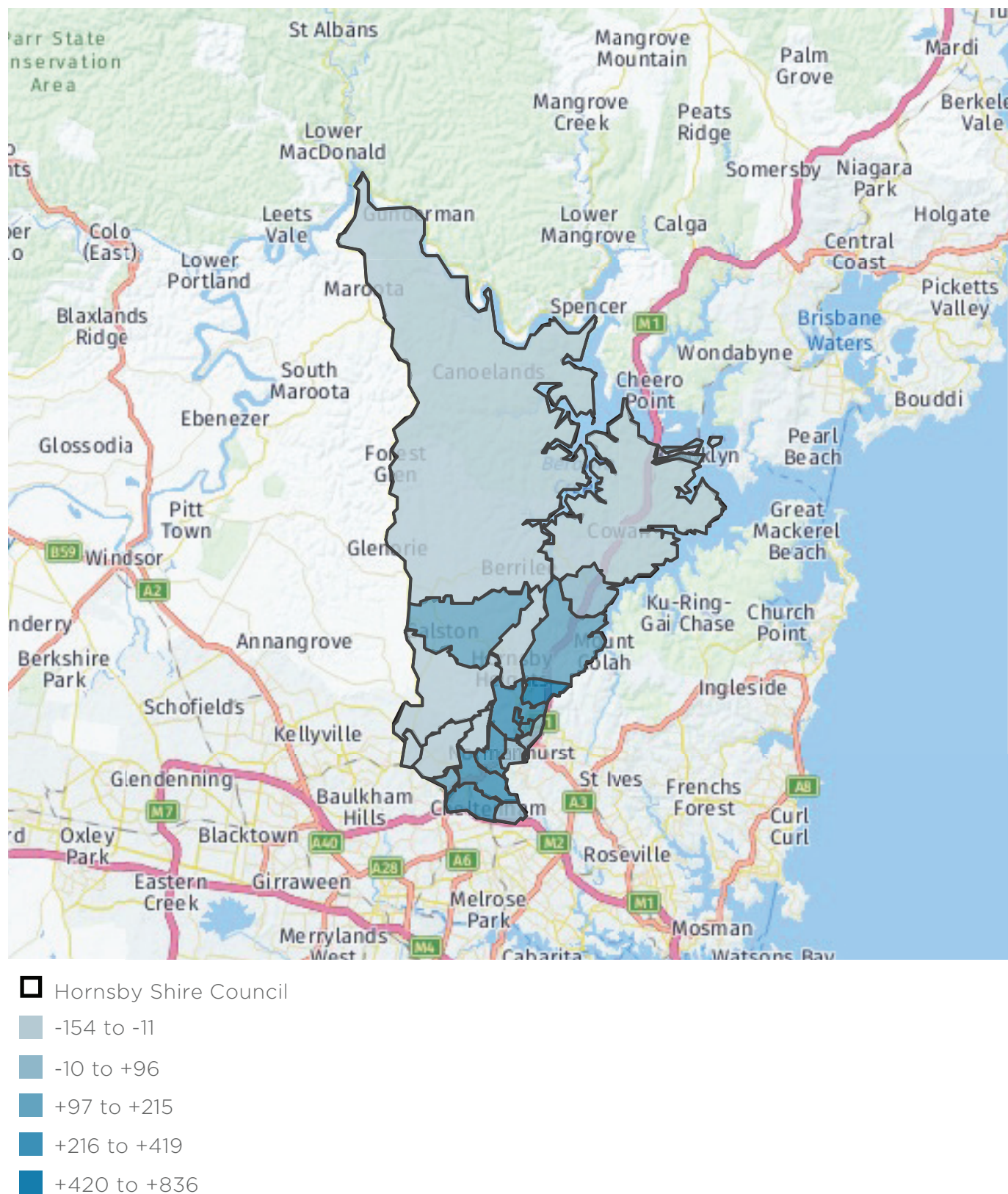


Figure 24: Forecast Household Types Map – Couples with Dependents

Source: Population and household forecasts, 2016 to 2036, prepared by .id, the population experts, February 2019.



## An Ageing Population

An ageing population will need smaller accessible dwellings located near health and community services and centres.

Council's records indicate that the number of persons aged 70+ in Hornsby will increase by 9,000 between 2016 and 2036 and will represent 14% of total population by 2036.

State Government predictions are slightly higher, at 10,850 additional 70+ residents. It is estimated that there will be 12,200 more people aged over 62 years in Hornsby Shire by 2036.

There is a need for more one bedroom and bedsits for a growing elderly population in lone person households.

Providing greater affordability and choice to older people keen 'downsize' but who do not move out of the area is an important consideration. The 2016 census data highlights that 49% of lone person households and 75% of couple family with no children live in a separate house. The evidence suggests that a growing proportion of Hornsby's detached housing is 'empty nest' households with many having reached or close to retirement age.

Many older people do not prefer high density housing and there is a comparative lack of low-scale medium density dwellings in the Shire. Most R3 – Medium density zoned land is already developed or in the development pipeline. Elderly residents are therefore

more likely to remain in their own detached dwellings for longer or have to move outside the Shire.

The forecasts indicate that Berowra Heights will see a significant change in the age group composition by 2036 as the resident population ages.

Seniors housing in areas such as Cherrybrook, Hornsby, Beecroft-Cheltenham, Castle Hill and Thornleigh is the impetus for much of the growth in the +70 age group in these locations. Other areas where there is a high percentage growth include Galston-Middle Dural and Westleigh.

## Aged Care Accommodation

There were 1,858 persons over 70 years in aged care in 2016. This is predicted to rise to 2,537 in 2036. Figure 25 below.

Beyond the current development pipeline, the population forecasts assume no further increase in residential aged care facilities. The Shire will continue to play a more than prominent role in residential aged care, but the role will diminish slightly after 2026 as no developments are assumed.

A separate Seniors Housing Demand and Supply Review has been prepared by Council to assist decisions concerning the preparation of a standalone Seniors Housing Strategy.

**Historical and assumed population 70+ in residential aged care, Hornsby Shire, 2006 - 2036**

Aged care components	2006	2011	2016	2021	2026	2031	2036
<b>Population 70+</b>	12,848	14,428	16,279	19,159	21,806	23,841	25,279
<b>Commonwealth Funding (Beds per 1,000 70+ pop)</b>	86	85.8	79.7	79	77.6	76.3	75
<b>Normal' Commonwealth Funding (no. beds)</b>	1,105	1,238	1,297	1,514	1,692	1,819	1,896
<b>Hornsby Shire residents aged 70+ in aged care</b>	1,952	2,144	1,858	2,157	2,537	2,537	2,537
<b>Hornsby Funding ratio (based on normal funding)</b>	117%	173%	143%	143%	150%	139%	134%

Figure 25: Historical and Assumed Population 70+ in Residential Aged Care, Hornsby Shire, 2006 - 2036

Source: .id the population experts, Hornsby Shire Forecasts 2019



## Young Workers

Young workers will require more affordable and accessible locations. Currently this age group is leaving the Shire.

Young adults are likely to continue to move to the inner city LGAs. There is an obvious out migration of young adults, which is being driven by affordability and limited tertiary education opportunities. Future growth of the education sector would help to retain the young adult population for which adequate housing provision near public transport and services will be needed.

## Key Workers

Key workers need affordable rental or purchase housing near their place of work. Key workers are leaving the Shire as houses are around 30 times their median annual income, and units are around 17 times their income. Further consideration of the needs of Hornsby's workforce, including the 52% who live outside the Shire. Many workers may choose to live in the Shire if they could. Key workers are likely to form a significant proportion as the health care, social assistance, education and training are the largest employment sectors.

## Housing Market Area

Hornsby is in a housing market area that covers key road and rail transport routes to Macquarie Park and the CBD

Recent research suggests that people generally prefer to remain in their local area, with 82% of residents moving into a new home with 15km of their former residence.

The Greater Sydney Commission's North District Plan identifies four housing market demand areas. Hornsby is located within the Central North Area housing market area which stretches from the Parramatta River through Ryde and Hornsby in the north-south corridor around the T1 Northern train line.

This reflects the 2016 census data highlighting that the Shire attracted people from Parramatta, Ryde, Cumberland and Willoughby council areas.

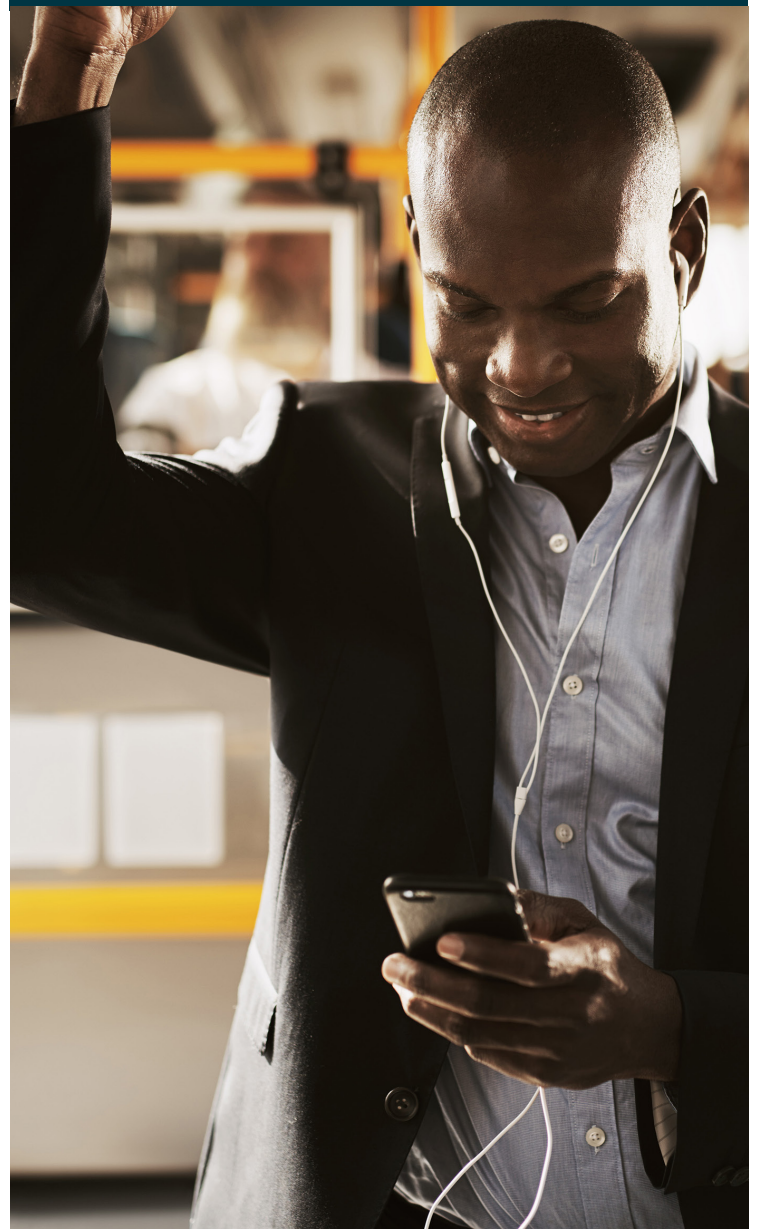
“

12,709 key workers work in Hornsby, with median annual income of \$40,367 (2016)

14,611 key workers live in Hornsby, with median annual income of \$39,761 (2016)

- Profile ID

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## North District Housing Market Areas

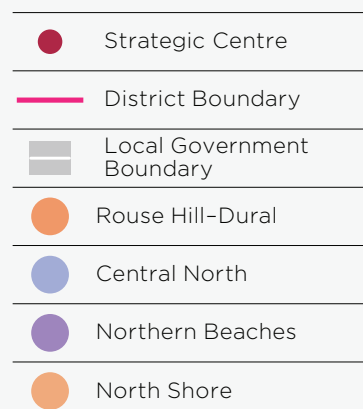
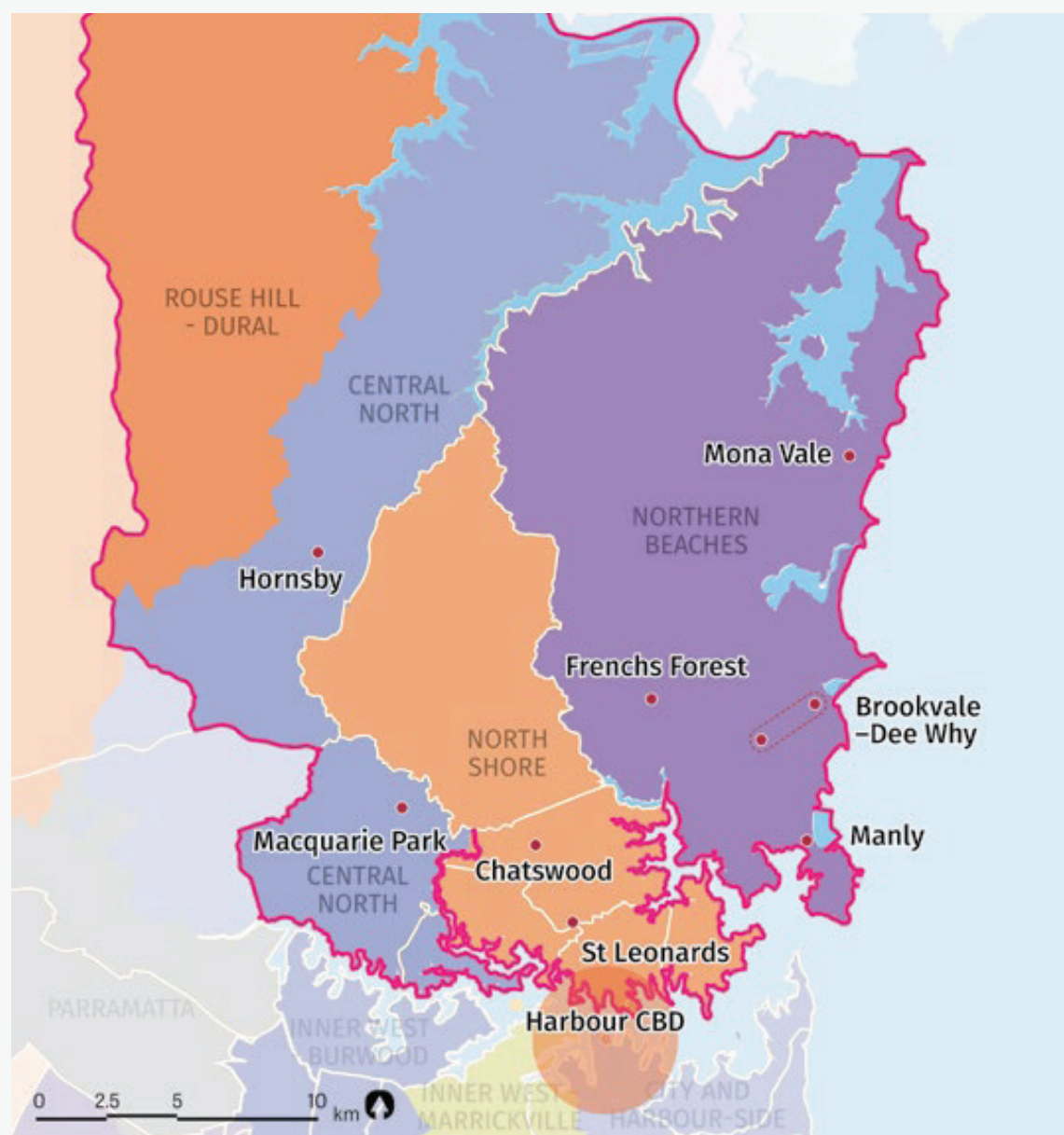


Figure 26: North District Housing Market Areas

Source: Greater Sydney Commission North District Plan March 2018

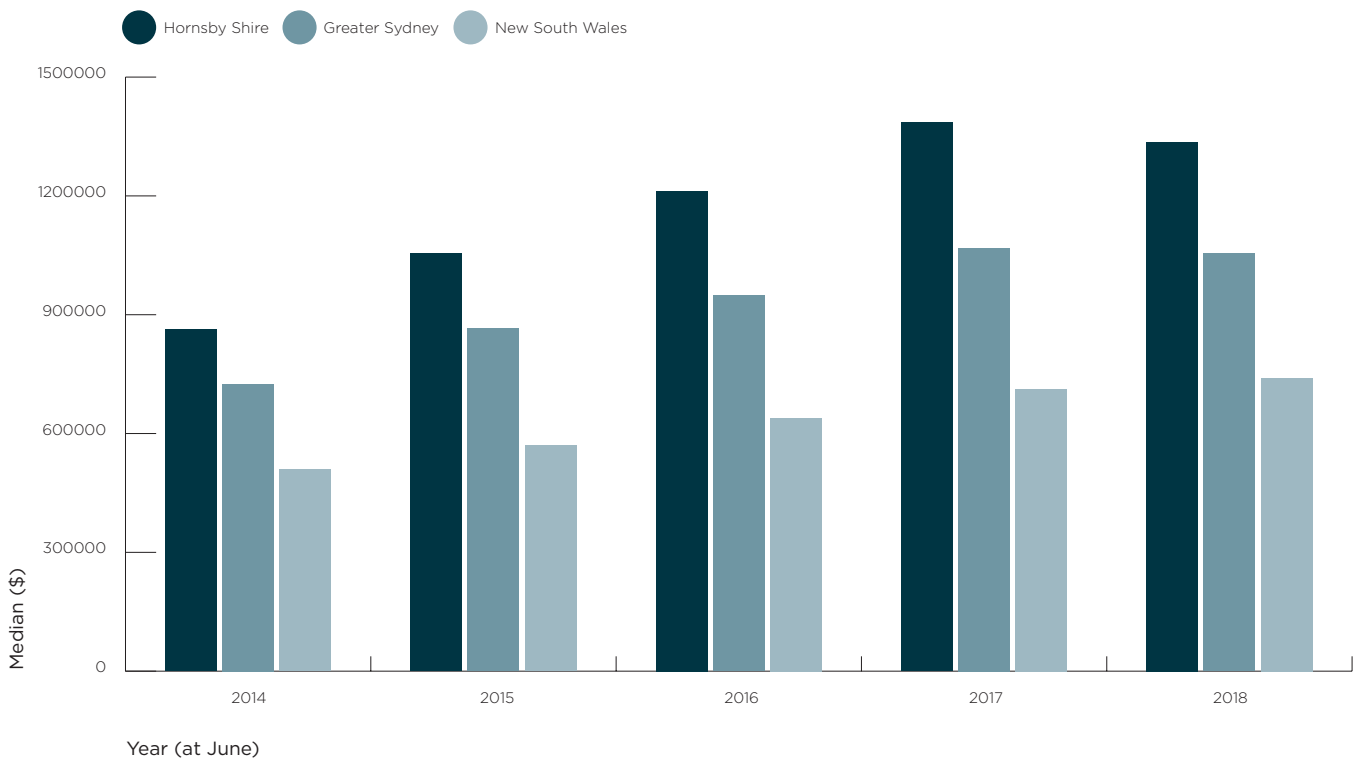


## House and Unit Sale Prices

The median value of dwellings in Hornsby Shire has increased in line with rising prices throughout Greater Sydney. The sale value of houses in Hornsby Shire exceeds the Greater Sydney average. The value of apartments (units) is slightly lower than the Greater Sydney average. House prices are one of the key indicators of an area's popularity. High house prices usually indicate access to high paid jobs and a very desirable area. This can present issues in attracting and retaining key lower skilled workers. Hornsby's relatively high sales prices reflect the type of housing (predominantly large detached dwellings (72%) and excellent transport links to major employment destinations commensurate with highly paid jobs. There are very high proportions of 4 and 5 bedroom houses in comparison to Greater Sydney. These numbers are also increasing.

The median house value in Hornsby increased from \$862,522 in 2014 to \$1,336,079 in 2018, an increase of 55%. Prices had fallen from a peak of \$1,384,744 in 2017.

### Median Valuation of Houses in Hornsby Shire

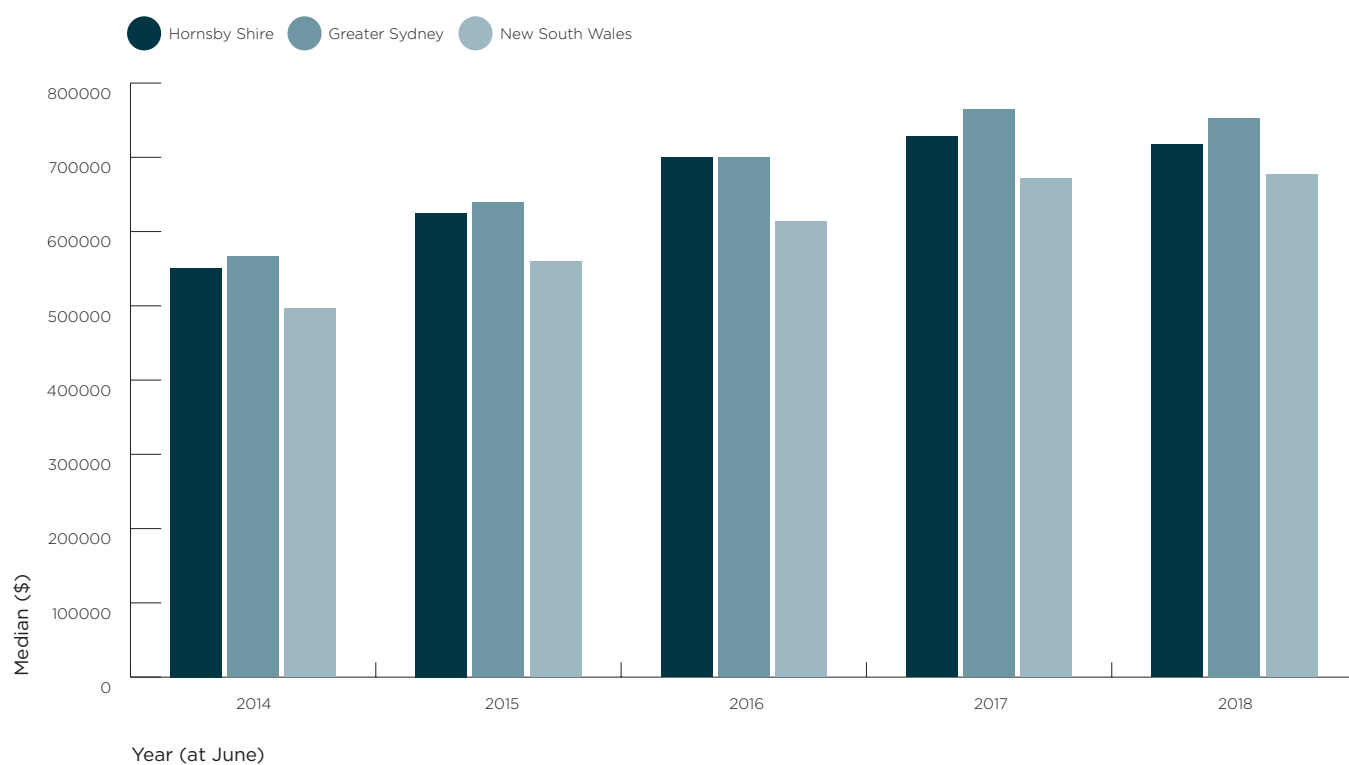


**Figure 27: Median Valuation of Houses in Hornsby Shire**

Source: Hometrack 2014–2018, Housing Valuation System. *id the population experts, Hornsby Shire Forecasts 2019*



## Median Valuation of Units in Hornsby Shire



**Figure 28 Median Valuation of Units in Hornsby Shire**

Source: Hometrack 2014–2018, Housing Valuation System. *id the population experts, Hornsby Shire Forecasts 2019*

The median unit price in Hornsby increased from \$550,898 in 2014 to \$717,430 in 2018, an increase of over 30%.

A recent study by the University of Sydney found that the median unit price in Greater Sydney in 2018 was 16 times the earnings of a key worker.

## House and Unit Rental Prices

Weekly rental prices for houses and units in Hornsby increased significantly between 2007 and 2017. During that time the weekly rent on a 3-bedroom house increased over 70% and a 2-bedroom unit increased by over 60%. Prices have dropped since the mid-2017 peak reflecting the general trend across Greater Sydney and NSW.

In June 2019 there were over 10,000 rental bonds held in Hornsby Shire. This represents a fall over 2,100 dwellings (-17%) since June 2017. In the 12 months to June 2019 there was a 6.6% increase in new bonds across all property types of which 46% were for units, 35% were for houses and 8% for town houses and the remaining 11% were 'other'. This suggests there are fewer private properties available for rent and that nearly half of all new bonds are for units.

In the quarter to June 2019 there were 497 new bonds lodged for units in Hornsby of which 302 were 2-bedroom units, 129 were 1-bedroom units, only 39 were 3-bedroom units.

The FACS June 2019 quarterly rent statistics show that Hornsby has higher house rents than the Sydney average, but lower unit rents.

- House (3-bedroom) - median weekly rent was \$600 (down from \$650 in 2017), higher than \$550 in 2012). The median weekly rent of all sized houses was \$660 (June 2019). Greater Sydney average in 2019 was \$480.
- Townhouse (3-bedroom) - median weekly rent was \$620 (June 2019) which is the same as September 2018. Greater Sydney average in 2019 was \$550.
- Unit (2-bedroom) - median weekly rent was \$495 (down from \$530 in 2017, but still higher than \$470 in 2014). Greater Sydney average in 2019 was \$535.



## Social Housing Waiting Time

The Department of Family and Community Services (FACS) has released updated information on the expected social housing waiting times for general applications. Social housing waiting times have risen in the 12 months to June 2019. For priority applicants this has risen 41%. For general applicants this has risen 4%.

Hornsby is located within Northern Zone which includes 84 suburbs. As at June 2019 there were 1,346 general applications (up from 1,292 in June 2018) and 252 priority applications (up from 179 priority applications at 30 June 2018). The expected waiting time for 2 and 3 bedroom properties is 5 to 10 years. The expected waiting time for a studio/1 bedroom property and 4+ bedroom properties is 10+ years.

Priority applicants are those who need urgent housing and are not able to rent privately. Applicants must also show that they have tried to find accommodation in the private rental market before being considered for priority housing.

## Patterns of Demand

Preliminary market research undertaken in 2016 indicated the preference of the 30-49-year groups for detached housing, which is the dominant house structure in the Shire (over 72%). The median house price of \$1.35M is often beyond the affordability of many households, which results in people choosing to rent, or moving to another area or medium and high-density dwellings.

Council's Seniors Housing Supply and Demand Review notes that the Baby Boomer generation are creating demand for new types of housing, seeking a smaller single level house with a garden or courtyard.

A survey of estate agents indicated strong interest from potential buyers for medium density product and that greater diversity of housing was required to meet market demand. Medium density currently only comprises 12.2% of dwelling structure in Hornsby Shire.

Hornsby's current medium density controls favour strata product in larger developments within consolidated lots and basement parking

## Diversity and Choice

Council is mindful that, although there is enough zoned land and development pipeline capacity to accommodate total dwelling demand, Council's planning for the medium to long term will need a focus on housing choice and diversity to cater for the expected age, income and household type in the Shire.

Sydney-wide research undertaken by The Grattan Institute, UTS, The CUT and The Committee for Sydney has demonstrated a strong support from community for an increase in housing diversity and clear recognition of the lack of supply of this type of housing.

Further assessment of the demand and opportunities for a range of medium density development housing types is needed.





## Affordable Housing

Council's draft Affordable Housing Discussion Paper suggests a number of options that could be developed into either a future Affordable Housing Policy or separate strategies and actions. There are specific actions also identified in the North District Plan which include:

- An Affordable Housing Contribution Scheme under State Government policy (SEPP 70) to levy affordable housing contributions. An amendment would be required to be made to the Hornsby Local Environmental Plan 2013 to allow contributions to be collected; or
- An Affordable Rental Housing Target Scheme which would set rental housing targets for low and very-low income households of between 5-10% of additional floor space, generated through a rezoning undertaken as part of the Hornsby Town Centre Review.



Social housing is rental housing provided by not-for-profit, non-governmental or government organisations to assist people who are unable to access suitable accommodation in the private rental market. Social housing includes public, Aboriginal and community housing, as well as other services and products.

Affordable housing is housing that is provided at a discount to market rent. These properties are likely to have been developed with assistance and planning incentives from the NSW and / or Commonwealth Governments, or cross subsidy from the sale of private dwellings. Affordable housing may be owned by private developers, private organisations, local governments or community housing providers, but is usually managed by not-for-profit community housing providers.



– Source: Future Directions for Social Housing in NSW, NSW Government, 2016



## 2.3 Housing Supply

“

Housing supply needs to include right types in the right areas and take into consideration the unique character of local neighbourhoods. Communities and councils have the lead role in determining where new housing can be delivered and how this can be done with respect to the character of the local neighbourhood.

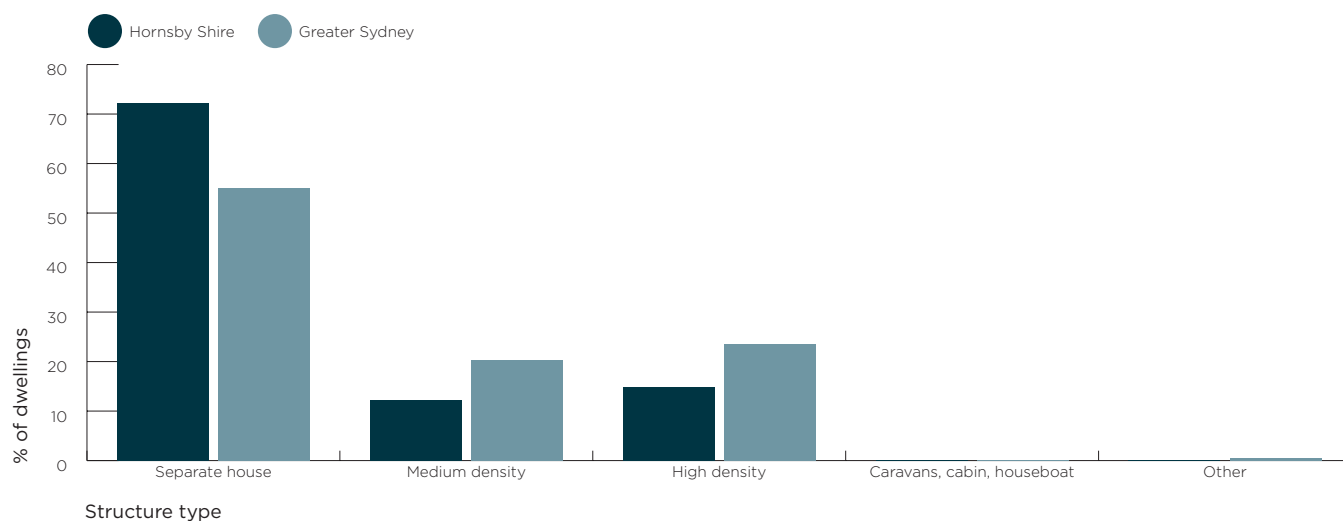
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## Dwelling Stock in Hornsby Shire

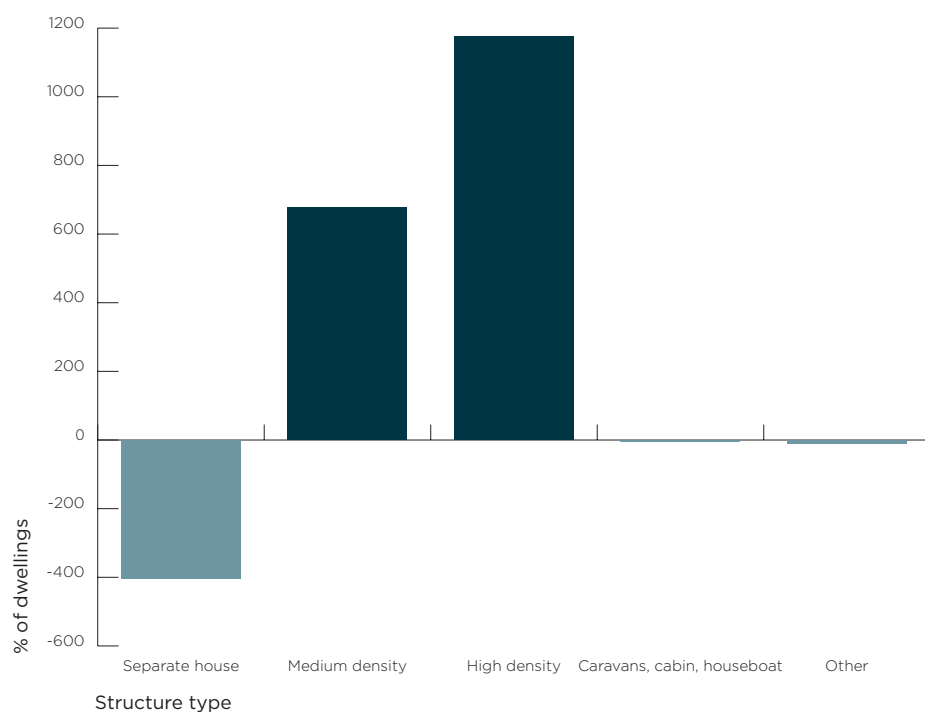
In 2016 there were 51,420 private dwellings of which 72% were separate dwellings.



**Figure 29: Dwelling Structure 2016**

Source: *id the population experts, Hornsby Shire Forecasts 2019*

The overall dwelling stock increased by 1,574 between 2011 and 2016. This reflected a reduction in the overall number of separate houses (decline of 404) and an increase in apartments and medium density stock (1,176 and 676 respectively).



**Figure 30: Change in Dwelling Structure 2011 to 2016**

Source: *id the population experts, Hornsby Shire Forecasts 2019*



## Projected Housing Growth

Residential development forecasts assume the number of dwellings in Hornsby Shire will increase by an average of 744 dwellings per annum to 66,632 in 2036.

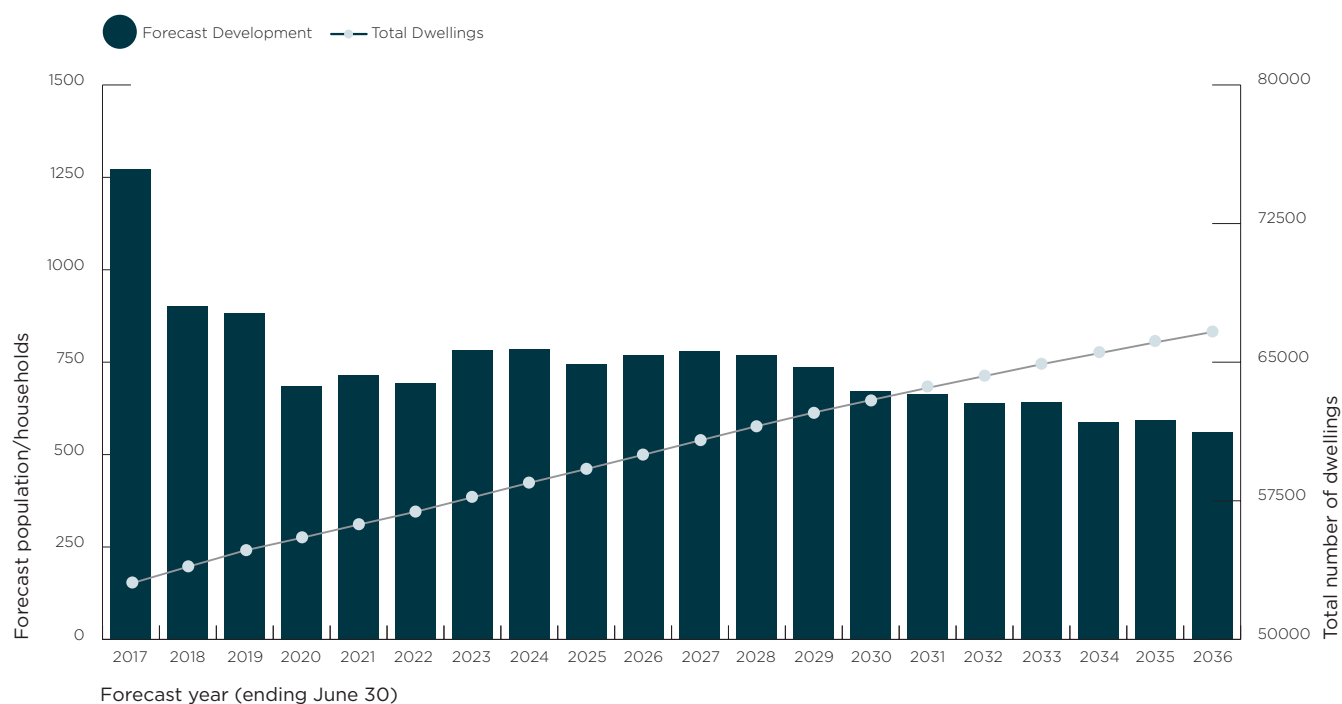


Figure 31: Forecast Development and Housing Growth, 2017–2036

Source: *id the population experts, Hornsby Shire Forecasts 2019*

## Historical and forecast dwelling gain, Hornsby Shire and Northern Sydney, 1996–2036

	1996-01	2001-06	2006-11	2011-16	2016-21	2021-26	2026-31	2031-36
<b>Hornsby dwelling gain</b>	3,282	3,443	1,198	1,598	4,459	3,776	3,500-4,000	3,000-3,500
<b>North District</b>	14,037	13,909	12,589	19,422	25,950	22,017	22,017	22,017
<b>Hornsby (percent)</b>	23.4%	24.8%	9.5%	8.2%	17.2%	17.1%	16.3%	13.6%

Figure 32: Historical and Forecast Dwelling Gain, Hornsby Shire and Northern Sydney, 1996–2036

Source: *ABS, Census of Population and Housing; id the population experts, Hornsby Shire Forecasts 2019*



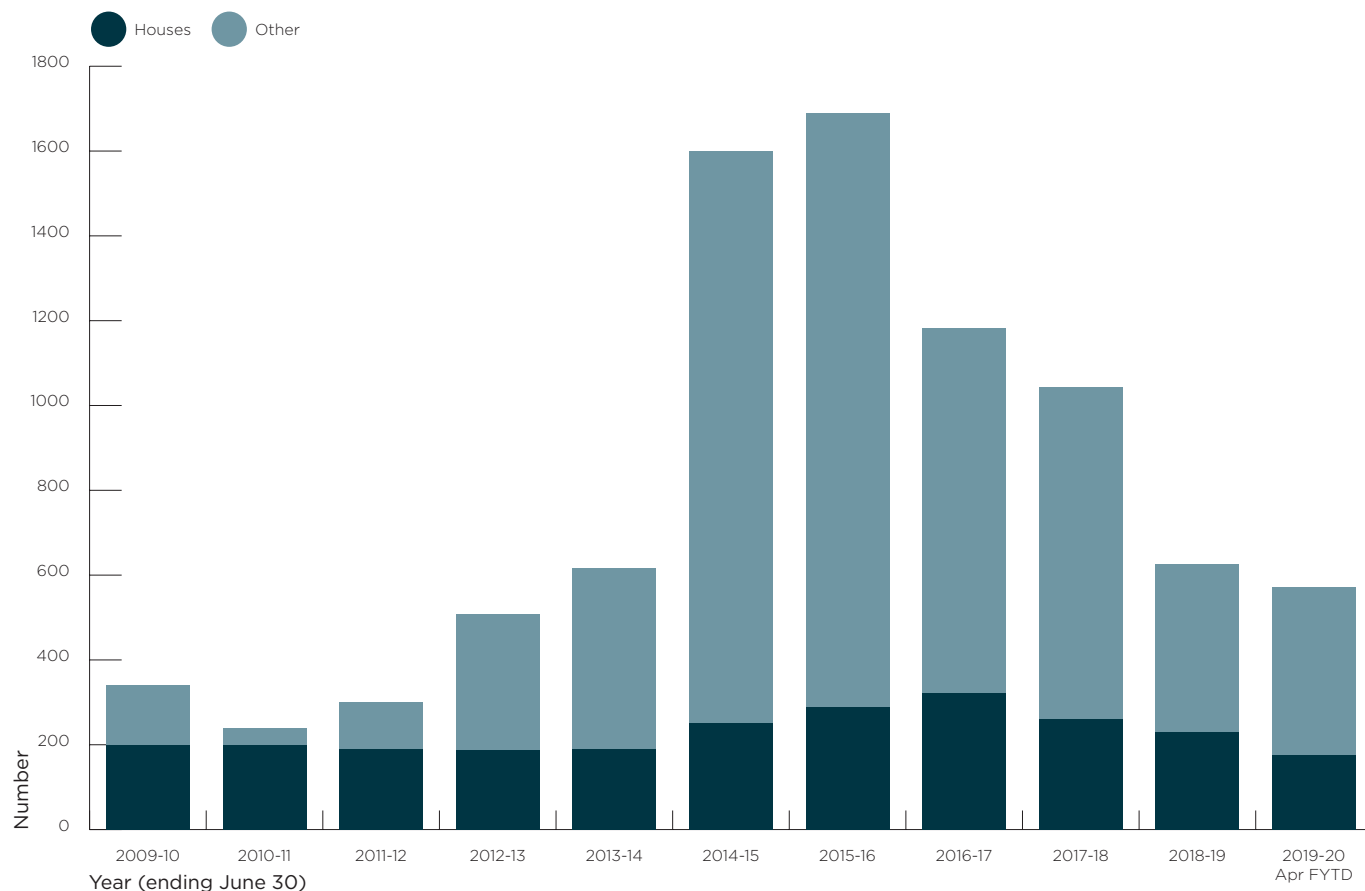
## Dwelling Gain and Building Approvals to 2021

Figure 33 shows building approvals since 2009. This highlights Hornsby's relatively slow dwelling growth between 2011 and 2016. This trend contrasted with the significant growth across Northern Sydney.

The adoption of the Hornsby Shire Housing Strategy 2011, which identified new precinct areas for medium and high-density development resulted in building approvals. Additional development was also separately identified for the western side of Hornsby Town Centre.

There was a spike in dwelling approvals between 2014-2016 particularly in the precinct areas close to public transport and commercial centres. The precincts allow for a mix of townhouse, five-storey and eight-to ten-storey residential and mixed-used developments. These are located in parts of Asquith, Beecroft, Hornsby, Mount Colah, Normanhurst, Pennant Hills, Thornleigh, Waitara and West Pennant Hills. Figure 36 provides the location of all the housing precincts.

### Building approvals, Hornsby Shire, 2009-2019



**Figure 33: Building Approvals, Hornsby Shire, 2009-2019**

Source: Australian Bureau of Statistics, *Building Approvals, Australia* (8731.0). *id the population experts, Hornsby Shire Forecasts 2019*



Hornsby is on track to deliver a net increase of 4,500 dwellings between 2016 and 2021. As at December 2018 there were 4,254 dwellings approved. Figure 34 below.

#### North District Housing Targets vs. Dwelling Approvals

LGA	Draft GSRP target 2016 - 2021	Dwelling approvals Jul 2015 - Dec 2018	% 2016 - 2021 target already approved
<b>Hornsby</b>	<b>4,350</b>	<b>4,254</b>	<b>97.80%</b>
<b>Hunters Hill</b>	150	142	94.70%
<b>Ku-ring-gai</b>	4,000	3,964	99.10%
<b>Lane Cove</b>	1,900	2,313	121.70%
<b>Mosman</b>	300	179	59.70%
<b>North Sydney</b>	3,000	2,239	74.60%
<b>Northern Beaches</b>	3,400	3,689	108.50%
<b>Ryde</b>	7,600	8,765	115.30%
<b>Willoughby</b>	1,250	1,071	85.70%
<b>Total Northern Sydney</b>	<b>25,950</b>	<b>26,616</b>	<b>102.60%</b>

Figure 34: North District Housing Targets vs. Dwelling Approvals

Source: North District Plan. Australian Bureau of Statistics, Building Approvals Australia

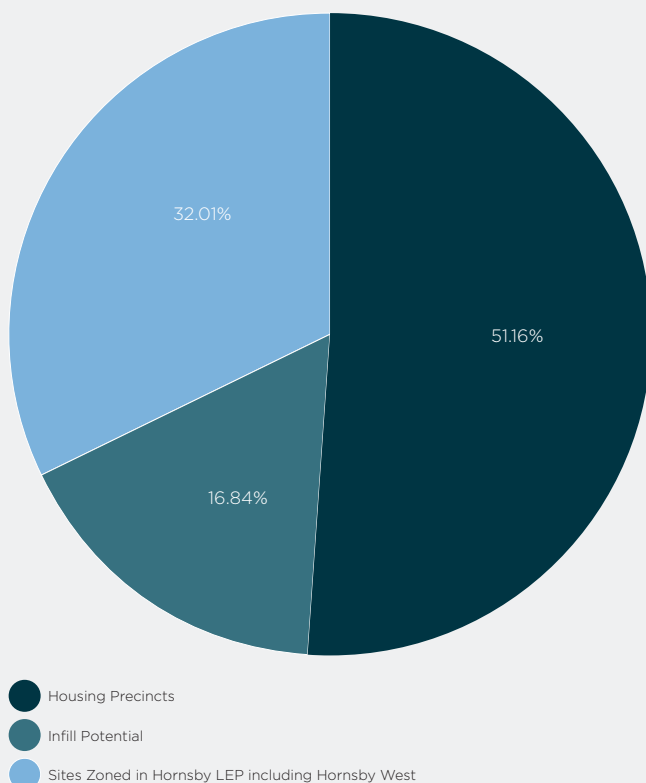


## Capacity of Existing Land Use Controls

An assessment of the Shire's theoretical housing capacity has been undertaken. This has identified the maximum number of dwellings (net) that could be developed under the current land use controls. The assumptions reflect development applications already consented and existing controls to determine yield, density and take-up for all relevant sites in the Shire.

The exercise has revealed that Hornsby Shire has a theoretical housing capacity, under existing planning controls, of around 12,150 dwellings from 2017 to 2036. The housing precincts identified in 2011 will provide half of all dwellings within existing land use controls. Other areas with significant development capacity yet to be constructed include Hornsby West, areas in Cherrybrook and retirement villages/senior living.

### Dwelling Potential under Current Controls 2016-2036



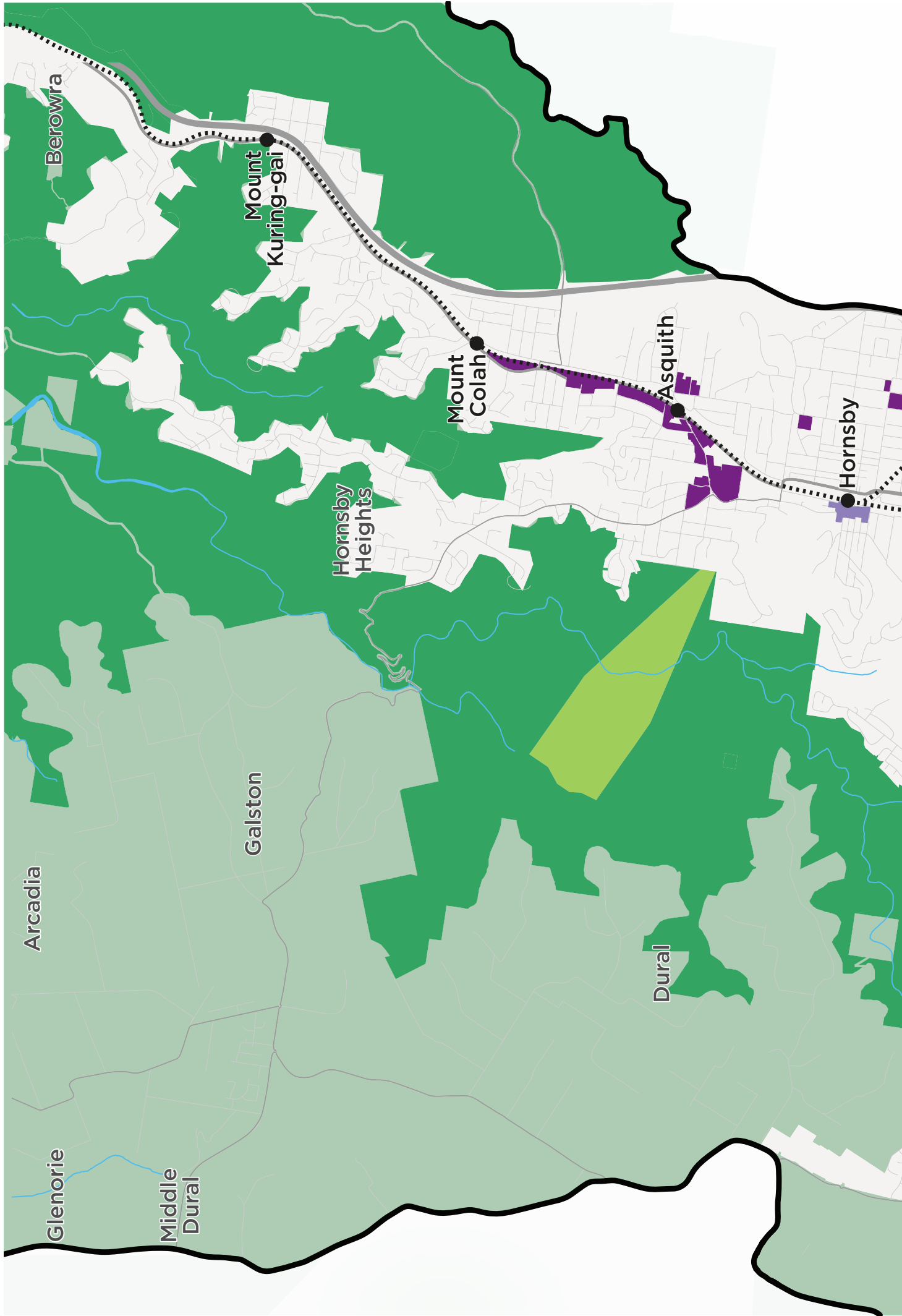
**Figure 35: Dwelling Potential Under Current Controls 2016–2036**

Source: Hornsby Council Records, id the population experts, Hornsby Shire Forecasts 2019





Existing Housing Precincts





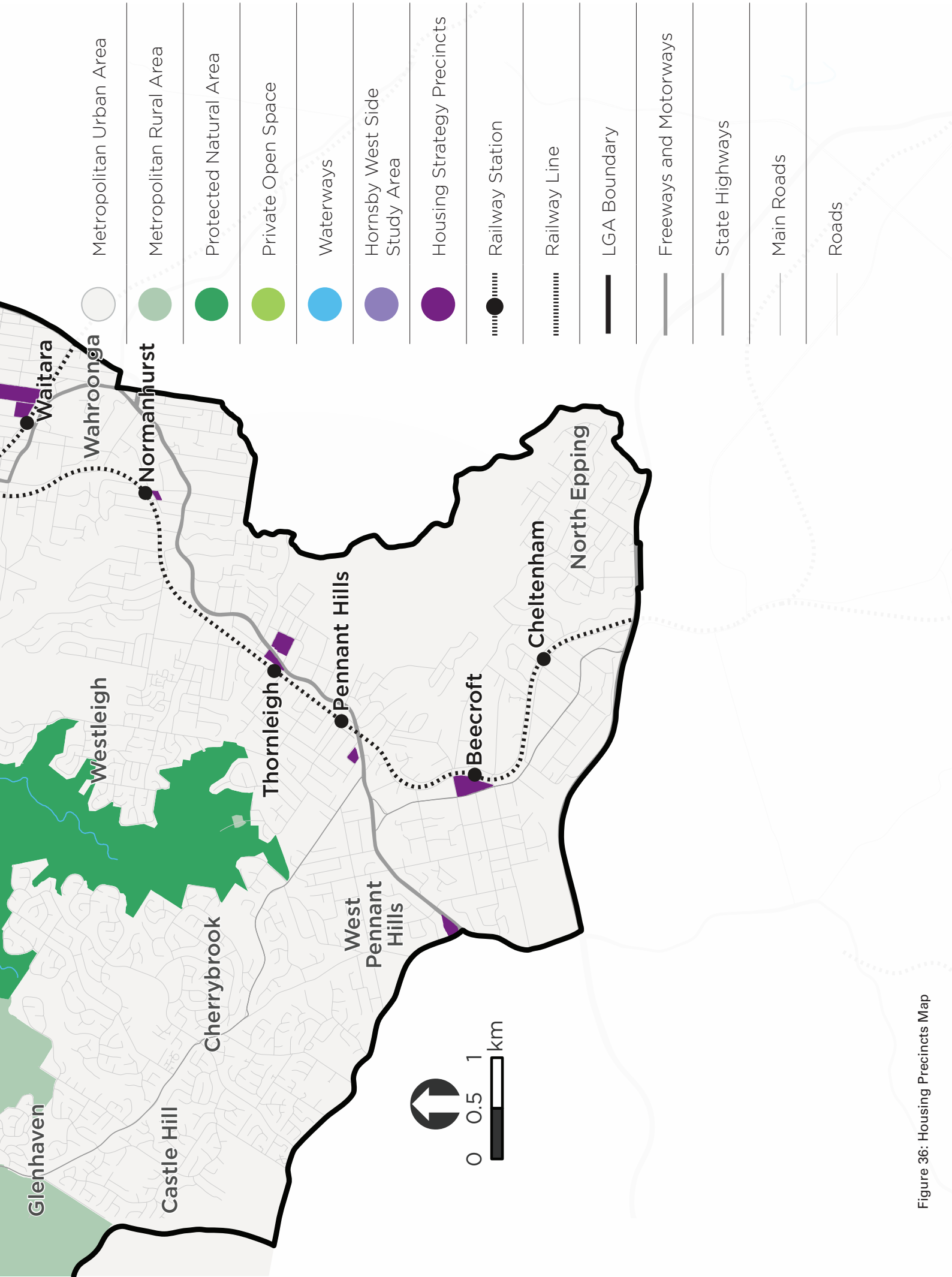


Figure 36: Housing Precincts Map

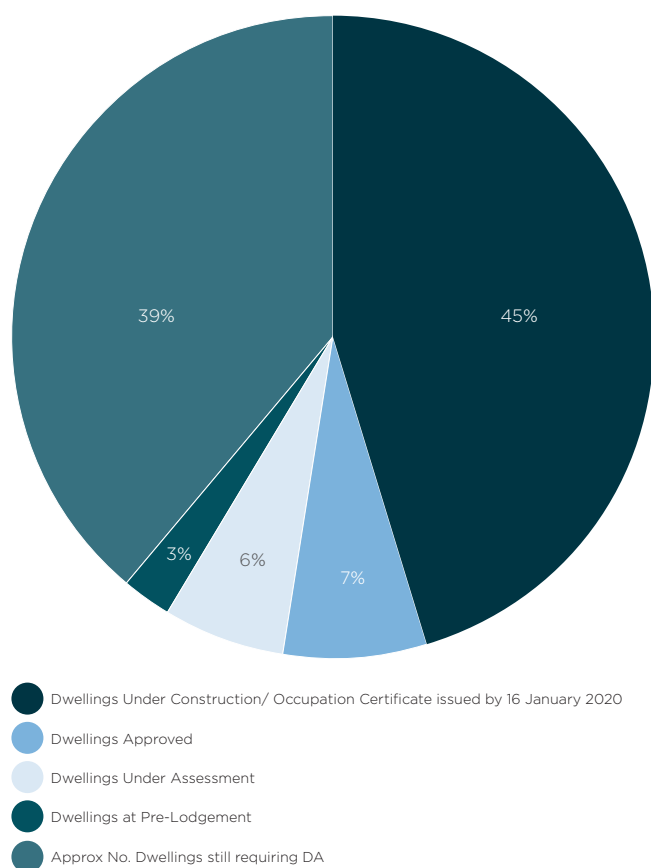


## Housing Precincts

The Shire's current housing precincts (identified in Appendix 2) will provide a significant proportion of the dwellings needed in the Shire.

These precincts offer the potential to deliver around 6,182 dwellings between 2017 and 2036, with a further 378 dwellings beyond 2036.

### Housing Precincts 2016 to 2036



**Figure 37: Development Status Housing Precincts**

Source: Hornsby Council Records. *id the population experts*, Hornsby Shire Forecasts 2019

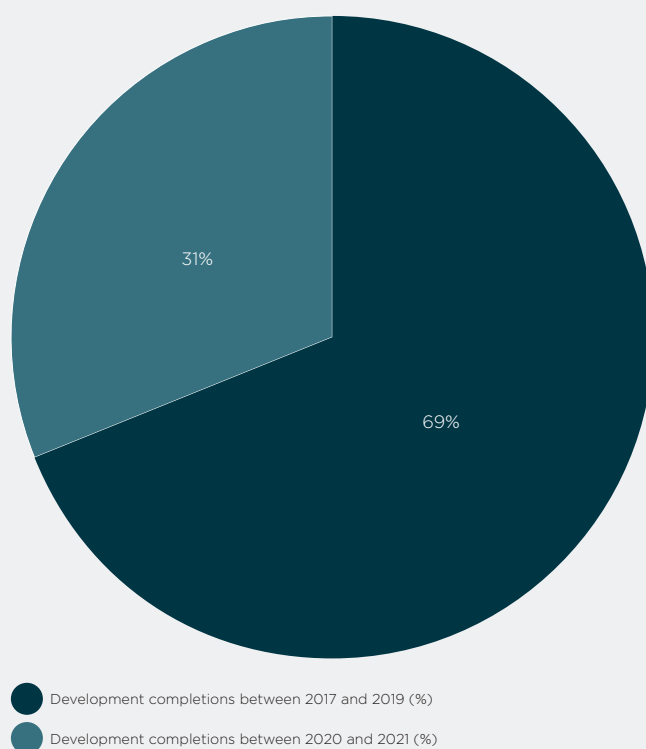




Approximately 50% of all dwellings in the housing precincts (3,028) are expected to be constructed by 2021.

Of those, around two thirds are expected to be delivered by the end of 2019. This reflects a period of significant construction activity over the last few years in precincts in Waitara (No.14), Mount Colah (No. 1) and Asquith (No.s 4, 5, 7 and 8) as identified in Figure 39.

#### Short-Term Development Projections in all Housing Precincts between 2017 and 2021

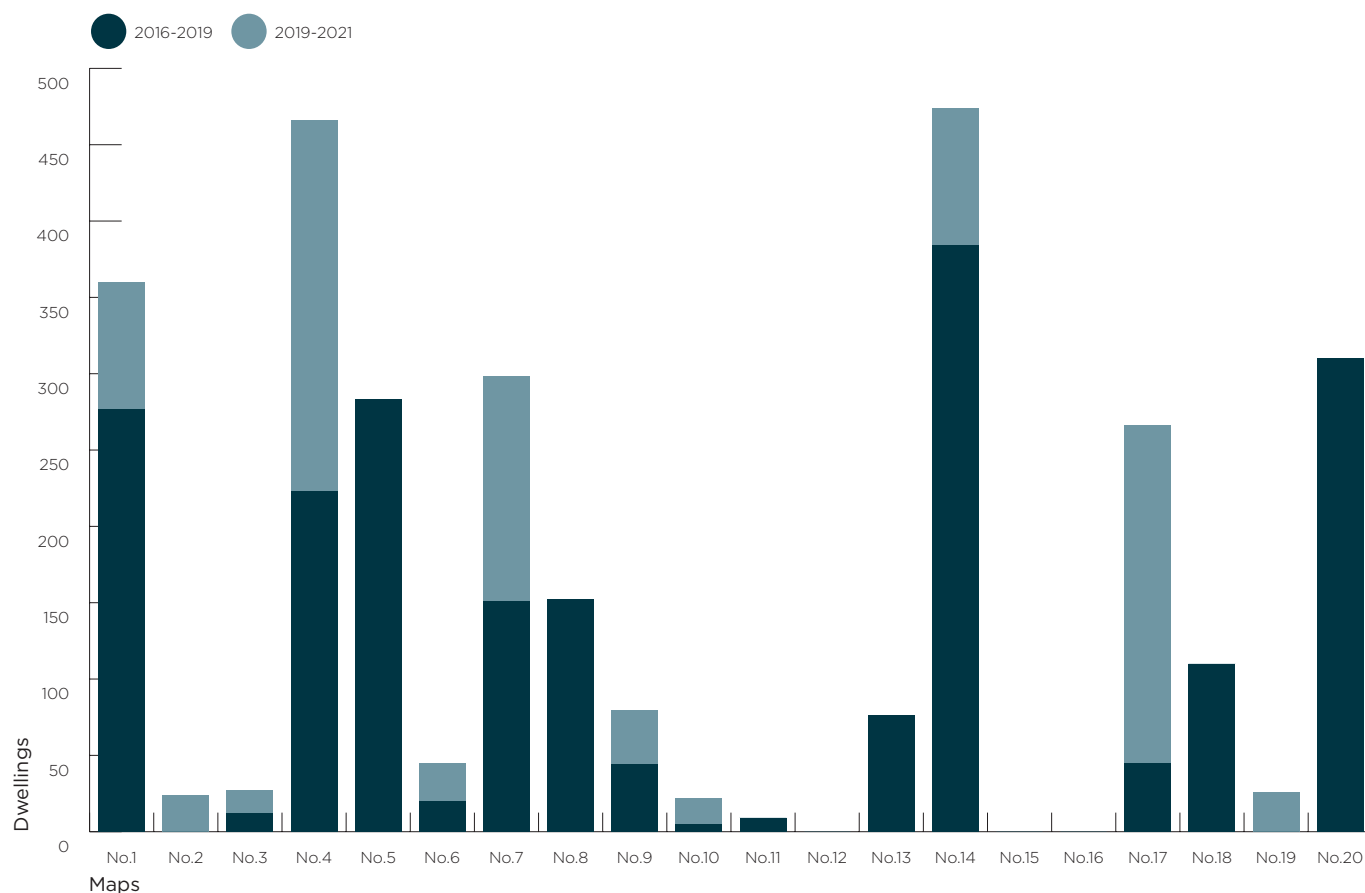


**Figure 38: Short-Term Development Projections in all Housing Precincts 2017–2021**

*Source: Hornsby Council Records. id the population experts, Hornsby Shire Forecasts 2019*



### Projected Development in Housing Precincts



**Figure 39: Projected Development in Housing Precincts**

Source: *id the population experts, Hornsby Shire Forecasts 2019*

Infill sites are those with subdivision or granny flat potential. Appropriate assumptions regarding likely take-up rates have been made. The Cherrybrook Planned Precinct area and land part of the Hornsby Town Centre Study Review are not included in current Housing Precinct projections.

Table 40 below identifies the development capacity of existing land use controls in Hornsby Shire.

Source	Potential no. of dwellings to 2036	Likelihood of delivery in: short (2017-2021), medium (2022-2026) and long term (2027-36)
Infill areas throughout the Shire	2,046	Around 20% could be delivered in the short-term. Estimate 424 dwellings. Around 25% could be delivered in the medium-term. Estimate 502 dwellings. Around 55% could be delivered in the longer-term. Estimate 1120 dwellings.
Total for other areas including housing precincts	10,104	Around 40% could be delivered in the short-term. Estimate 4,035 dwellings. Around 29% could be delivered in the medium-term. Estimate 2,744 dwellings. Around 31% could be delivered in the long-term. Estimate 3,325 dwellings.
<b>Total</b>	<b>12,150</b>	<b>Short-term: 4,459 (37%)</b> <b>Medium-term: 3,426 (28%)</b> <b>Long-term: 4,445 (35%)</b>

**Figure 40: Notional Development Capacity (existing controls) in Hornsby Shire 2017-2036**

Source: *id the population experts, Hornsby Shire Forecasts 2019*



## Future Housing Supply Assumptions

Table 40 above highlights that the Council has a theoretical development capacity of 12,150 dwellings without any further rezonings.

The .id projections for additional dwellings to 2036 is 14,879 dwellings, which includes development within the Hornsby Town Centre and government land around Cherrybrook Station precinct.

Early indications from the Hornsby Town Centre Review and preliminary work undertaken for the Cherrybrook Station precinct indicate that over 4,000 dwellings could be accommodated in these areas.

It would be necessary that approximately 50% of these dwellings were completed by 2036 to meet the dwelling projections. This aligns to where the planning for both projects is up to.

## Housing Supply Forecast By Area

The .id forecasts provide a geographical overview of where the 14,879 dwellings will be located. See Figure 41 (adjacent). This number includes a proportion of dwellings forecast at Cherrybrook Station and Hornsby Town Centre.

In the short-term growth will be concentrated in existing precinct areas including Asquith, Waitara and Mount Colah – Mount Kuring-gai.

## Housing Type Supply

A high proportion of the future housing supply will be apartments. Infill opportunities could provide between 14% of the dwellings which are likely to be subdivision and granny flat opportunities. These figures are notional and difficult to predict with accuracy.

The demographic profile and market preferences information indicates that there will be a mismatch in the type of housing that people want. There is a need for more housing choice and diversity to cater for a range of household types. This includes demand for medium density development, a form of housing which is lacking within the Shire.

## Forecast dwellings and development

Area	Change between 2016 and 2036
Hornsby Shire	+14,879
Arcadia - North Western Rural	+111
Asquith	+2,391
Beecroft - Cheltenham	+779
Berowra	+164
Castle Hill	+93
Cherrybrook	+1,135
Dural	+232
Galston - Middle Dural	+298
Hornsby Heights	+70
Mount Colah - Mount Kuring-gai	+909
Normanhurst	+176
North Epping	+96
Pennant Hills	+609
Thornleigh	+817
Wahroonga	+330
Waitara	+1,577
West Pennant Hills	+275
Westleigh	+36
Berowra Heights - North Eastern Rural Balance	+135
Brooklyn	+32
Hornsby Town Centre	+3,095
Hornsby Balance	+1,519

Figure 41: Forecast dwellings and development

Source: .id the population experts, Hornsby Shire Forecasts 2019



## Forecast Dwellings and Development



- Hornsby Shire Council
- 32 to 609
- 610 to 1519
- 1520 to 2391
- 2392 to 3095

Figure 42: Dwellings and Development Map

Source: *id the population experts, Hornsby Shire Forecasts 2019*



## 2.4 Land Use Opportunities and Constraints

This section provides an understanding of the council area and its development context by identifying the constraints and opportunities which may influence where development occurs.

### Land Use Constraints

Hornsby Shire has significant areas of land that are subject to environmental, ecological or natural hazard constraints. Most of these areas include significant areas of bushland and tree canopy cover. These areas would be unsuitable for new housing. A description of each constraint and relevant maps are provided for each.

### National Parks and Reserves

Nearly 70% of the Shire is National Park and reserves characterised by large tracts of bushland. These include Berowra Valley National and Regional Park, Ku-ring-gai Chase National Park and Crosslands Reserve. These areas are protected and are unsuitable for development. Figure 45 (Biodiversity map from the LSPS) highlights the extent of protected areas.

### Biodiversity

The Shire contains over 1,000 native plant species and 388 native animal species. Our current Biodiversity Conservation Management Plan (2006) is to be updated. The 2006 Plan lists 26 plant species and 42 animal species as threatened. Important Threatened Ecological Communities includes the Blue Gum Forest which is critically endangered – of the 2% remaining, 25% occurs in Hornsby Shire. Figure 45 (Biodiversity Map from the LSPS) highlights the extent of the biodiversity areas. Protecting these habitat areas is critical to the ongoing sustainability. These areas have been identified as unsuitable for further residential development beyond appropriately designed infill opportunities.

### Bushfire Risk

Proximity to bushland is one of the most significant constraints for future housing in the Shire. Bushfire prone areas are shown in Figure 43 and represent approximately 70% of the Shire's land area.

Increased housing densities will not be supported north of Yirra Road, Mount Colah until the Rural Fire Service is satisfied that Bushfire Evacuation Risk Modelling and Management Planning is adequate.

Council has made representations to the Greater Sydney Commission and the Department of Planning, Industry and Environment that the limitation which applies north of Yirra Road, Mount Colah should be considered in relation to the finalisation of medium and long-term housing targets for Hornsby.





## Bushfire Prone Land

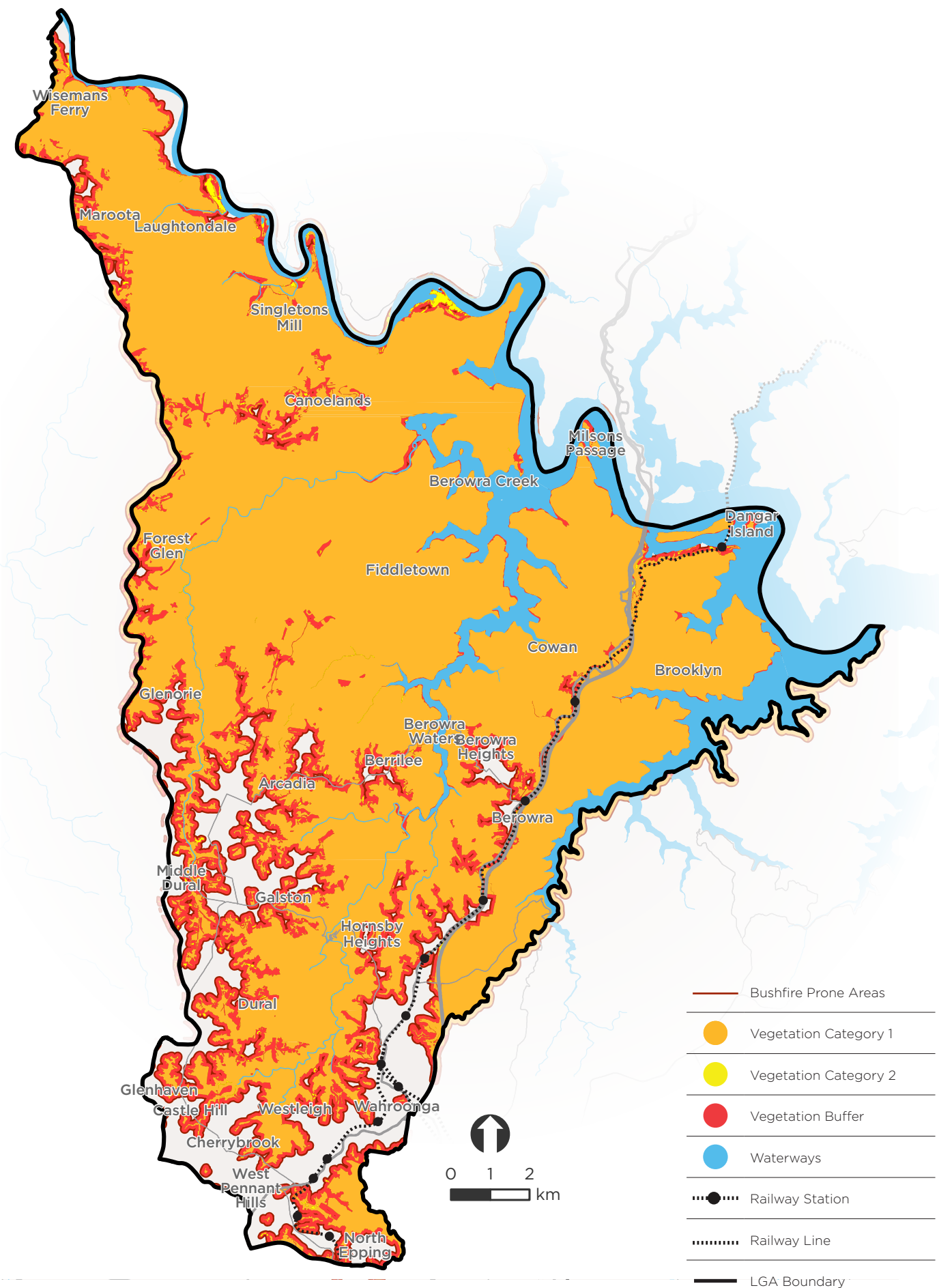


Figure 43: Bushfire Prone Land Map



## Land subject to Bushfire Evacuation Risk Modelling

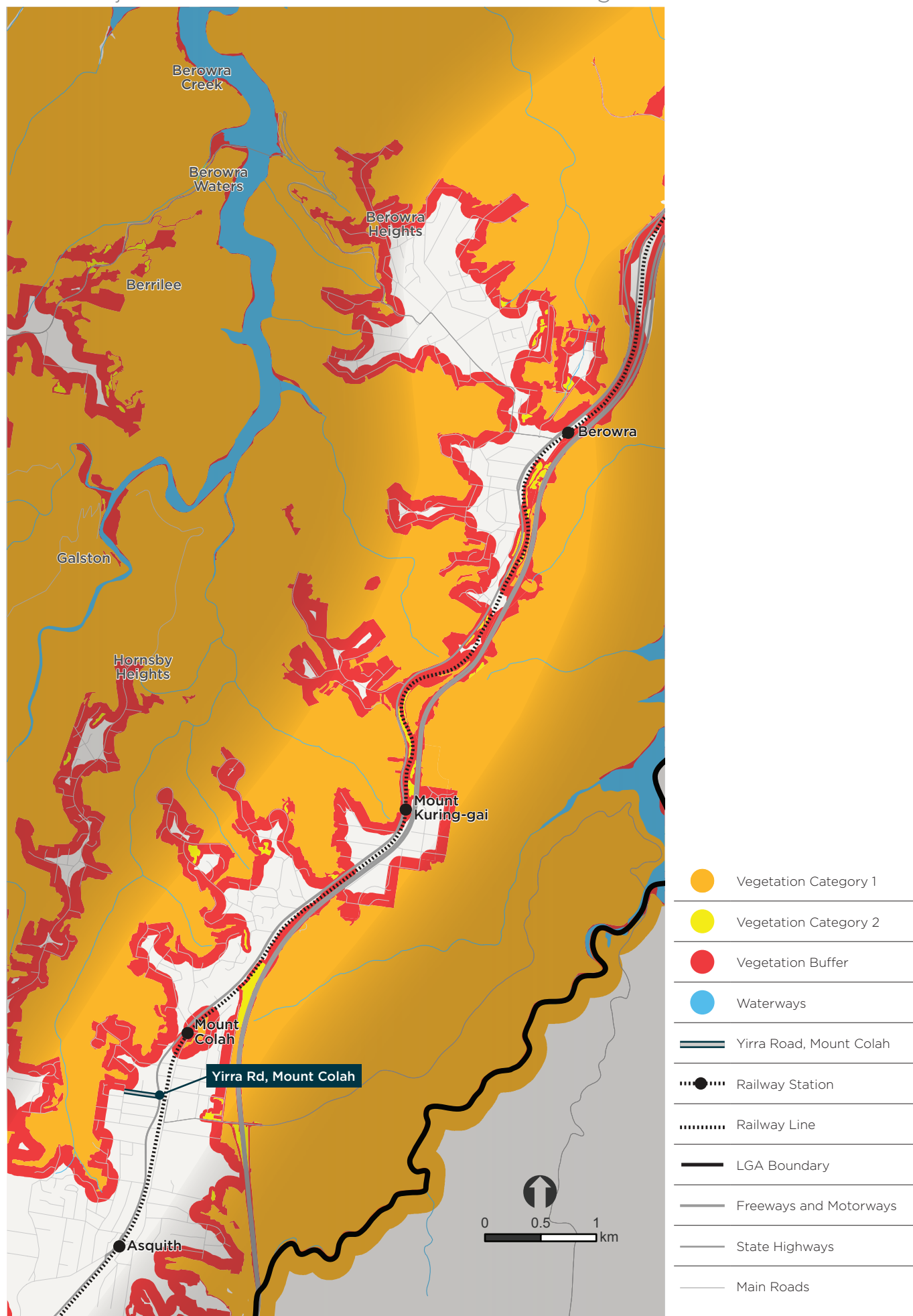
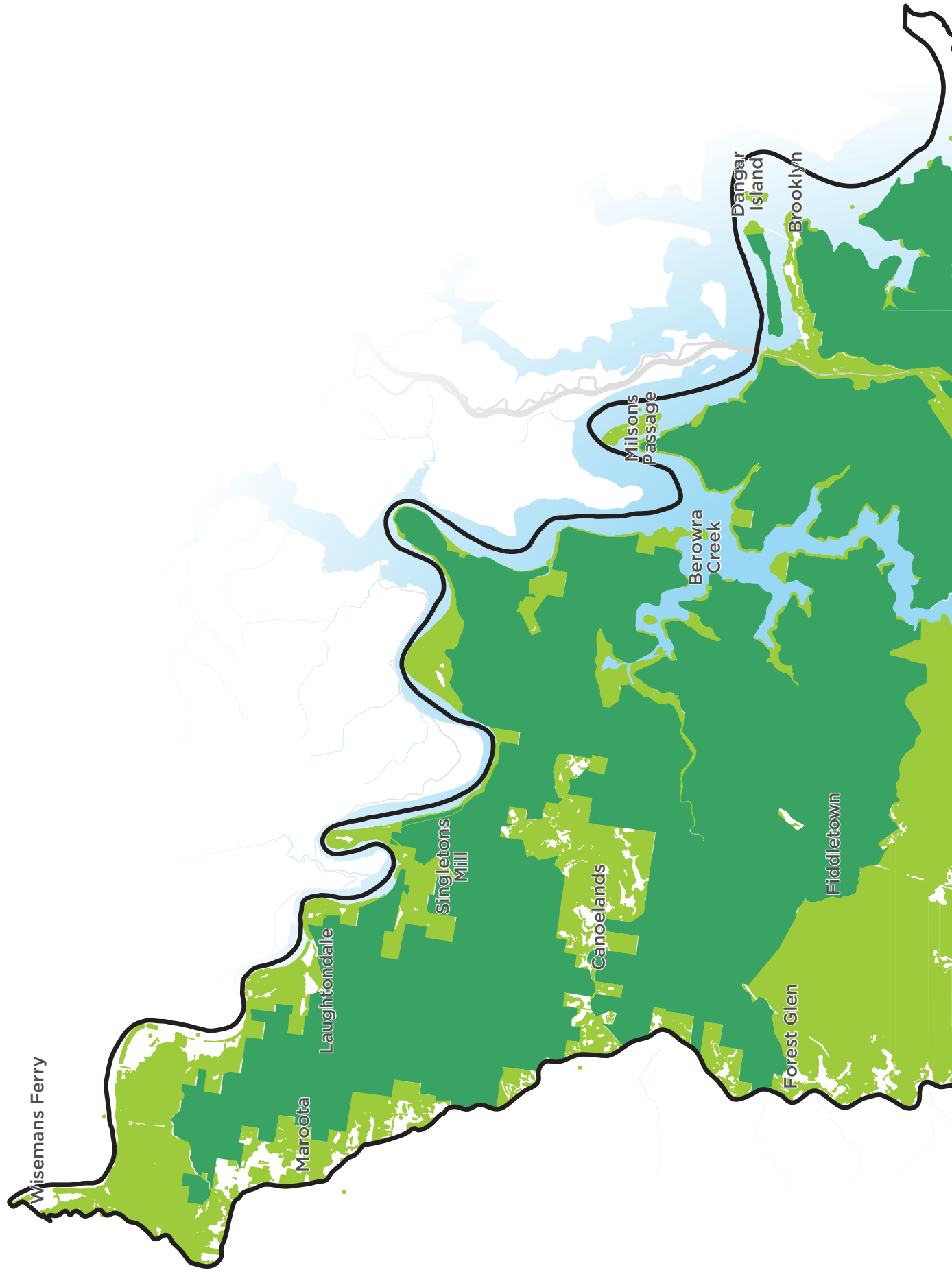


Figure 44: Land subject to Bushfire Evacuation Risk Modelling







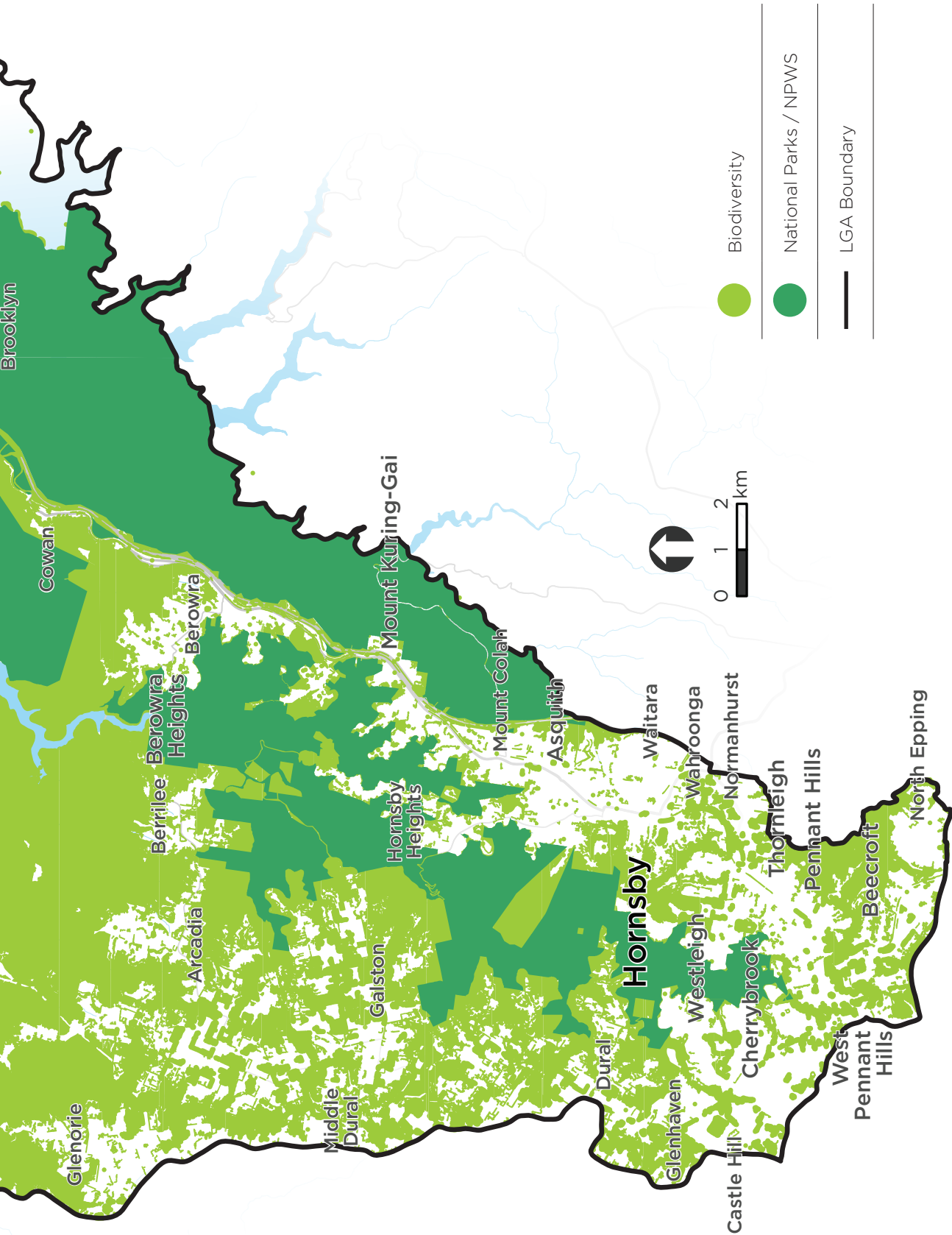


Figure 45: Biodiversity Map



## Trees and Canopy

The urban forest is important to the Shire's liveability, community health and wellbeing, biodiversity and to its landscape character and amenity. The community wants it to be protected and well managed.

An Urban Forest Strategy that aims to protect and enhance the urban tree canopy is being prepared. It will identify a Green Grid for Hornsby Shire and will influence many aspects of Hornsby's future including water quality, urban design, planning policy, active transport, biodiversity and climate change adaptation.

## Waterways

Our waterways are some of Hornsby's most important natural assets. The Lower Hawkesbury River supports the second largest estuary fishery and the second largest oyster farming industry in NSW .

Hornsby Shire covers the Berowra Creek, Hornsby Creek, Cowan Creek, Lane Cove and Hawkesbury River catchments. Increased urban development, clearing of vegetation can cause risks to waterway health through pollution and large quantities of storm water run-off from increased hard surfaces.

A waterways constraints analysis was undertaken as part of the baseline study for the 2011 Housing Strategy. Development scenarios were tested to understand the limits for sustainable development within the entire river catchment area. This helped to direct the development precincts to areas that would cause the least stress to estuarine environment. These areas included Beecroft, Cherrybrook, North Epping and Pennant Hills.

The 2019 Draft Waterway Health Review highlights that elevated nutrient concentrations remain an issue.



Image: © Francis Keogh - Berowra Waters Dawn



## Heritage

Heritage conservation is a key priority for parts of the Shire. We have 72 listed archaeological sites, 737 heritage items and six Heritage Conservation Areas (HCAs) of local heritage significance. The Department has amended the Seniors Housing SEPP to temporarily exclude the policy from applying to Heritage Conservation Areas in Greater Sydney until July 2021.

HCAs are worthy of protection due to the collective nature of the buildings and components that contribute to an overall heritage significance.

Heritage controls do not prevent development but aim to ensure that any change does not detract from the significance of heritage items. Sites in a heritage conservation area are potentially constrained.

Phase 1 of the Hornsby Heritage Plan, 2019 is complete and has included the preparation of a heritage gap analysis and the Hornsby Heritage Action Plan 2019. The final study will inform Council’s options, plans and development controls in areas identified for additional housing density.

### Heritage Conservation Area (HCA)

Beecroft-Cheltenham HCA

Hornsby West Side, comprising Mt Errington Precinct HCA Pretoria Parade HCA, and Peats Ferry Road HCA

The Crescent HCA

Wahroonga HCA

Wahroonga North HCA

Barker College HCA

Figure 46: Hornsby Heritage Conservation Areas



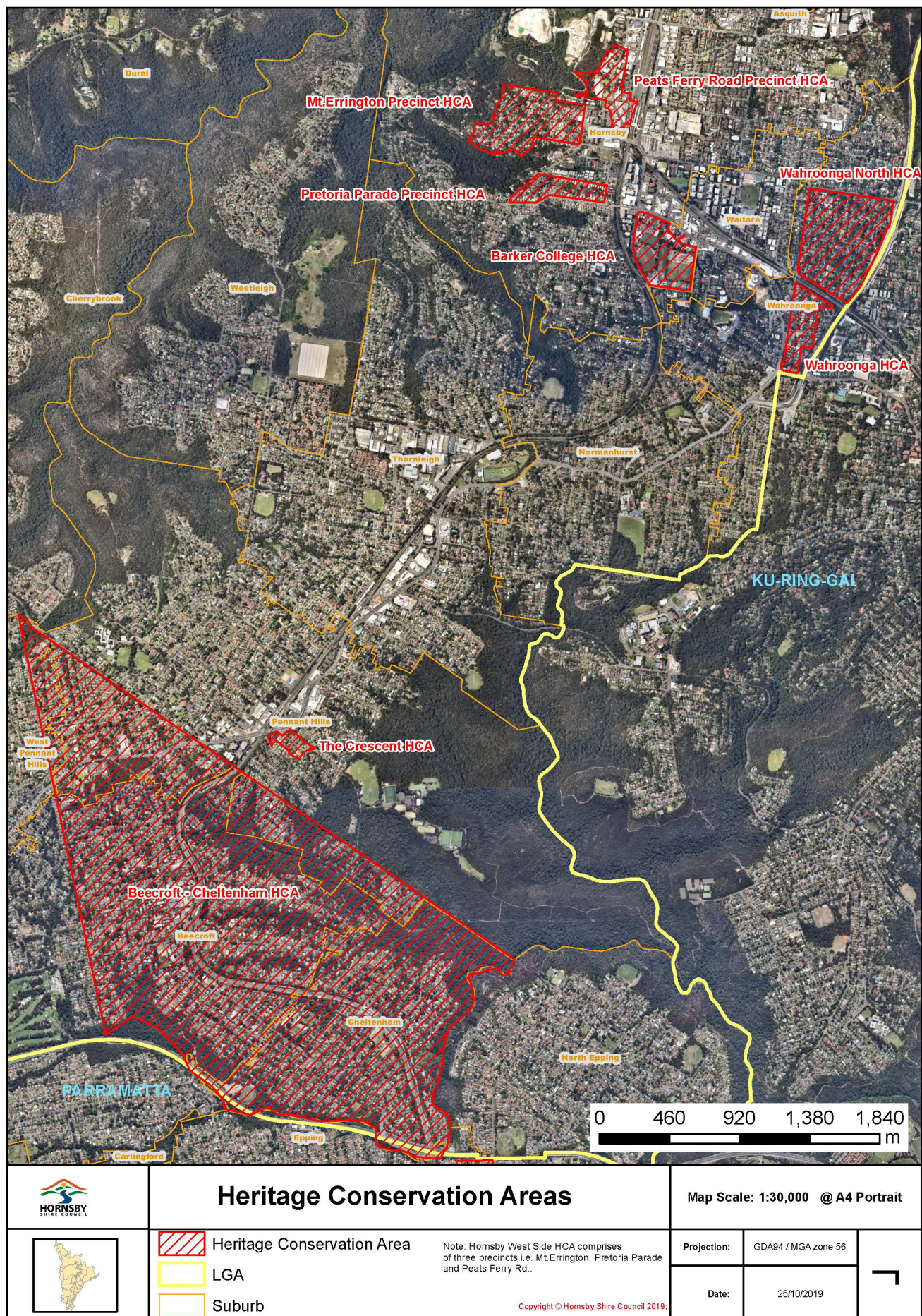


Figure 47: Heritage Conservation Areas in Hornsby Map



## Metropolitan Rural Land

A Metropolis of Three Cities and the North District Plan clearly state that our rural areas should not be used to provide for future housing needs. Only residential development that provides incentives to maintain and enhance the environmental, social and economic values of the Metropolitan Rural Area would be considered.

The Metropolitan Rural Area provides a valued scenic and cultural landscape. These areas make an important contribution to the sustainability, liveability and productivity of the Shire.

Council and the community share significant concerns about the State policy allowing seniors housing developments in the rural areas through the use of what is known as Site Compatibility Certificates (SCCs). These concerns have been raised with the Minister for Planning and the Greater Sydney Commission (GSC).

Council participated in a project working group with the GSC in the preparation of its report titled *Investigation into the Cumulative Impacts of Seniors Housing in the rural areas of The Hills and Hornsby local government areas*. The report highlighted issues such as inadequate infrastructure capacity, land use conflicts and impacts on the character of the rural areas.

Council is undertaking a new Rural Lands Study to set the strategic direction for the rural areas. A draft Study will be placed on public exhibition later in 2020.

## Infrastructure Constraints

The lack of adequate transport infrastructure is a key constraint in some areas.

Mains water and sewerage infrastructure is constrained in rural areas with around 2,700 properties unsewered or relying on onsite sewage management systems for the treatment of waste water.

Council is reliant on State Government and its agencies to assist with infrastructure delivery around arterial roads, highways and rail as well as schools, hospitals, water and sewer services. Council has been lobbying RMS to upgrade the section of New Line Road between Purchase Road and Old Northern Road to four lanes.

## Land Use and Infrastructure Opportunities

Council will focus on sustainable locations for future housing growth. Areas where there is a clear alignment with regional transport and accessibility to employment opportunities will be the priority.

Key infrastructure projects within the Shire that provide the opportunity to review land use alongside other key objectives include:

- Sydney Metro Northwest (Cherrybrook Station); and
- NorthConnex tunnel linking the M1 and M2 motorways which provides an opportunity to review the Pennant Hills Road Corridor between Thornleigh and Pennant Hills.

Council will also work with Transport for NSW on planning for the revitalisation of the Hornsby Town Centre including rail land and the broader precinct.

Council is currently updating the Employment Land Use Study. The Study will help to inform the development of a balanced strategy for economic development that encourages business growth and local jobs to complement the projected population growth in the Shire. New opportunities for mixed land use may emerge from the study.

## Local Infrastructure Considerations

### Schools

School age children in Hornsby Shire will increase by nearly 13.3% between 2016 and 2036. This equates to an additional 3,492 children in the Shire. The rate of growth is higher in the first 10 years from 2016-2026. This has implications for schools and the capacity of local facilities such as parks and leisure facilities. The pattern of growth is not consistent throughout the Shire and is concentrated in key areas. The demographic projections highlight that there will be a decline in school age children in key suburbs and areas.

The State Government is responsible for schools and ensuring adequate facilities are in place. Hornsby Shire Council will continue to work in collaboration with the Department for Education. An upgrade of Waitara Public School is currently underway for which will provide 38 new permanent teaching spaces with capacity for up to 1,000 students. This will be completed in mid-2020.



Hornsby Shire	2016		2026		2036		Change between 2016 and 2036
Age group (years)	Number	%	Number	%	Number	%	Number
Primary schoolers (5 to 11)	14,273	9.7	15,163	9.1	15,860	8.8	+1,587
Secondary schoolers (12 to 17)	11,945	8.1	13,587	8.2	13,849	7.7	+1,905
<b>Total</b>							<b>+3,492</b>

Figure 48: Forecast Increase in All School Age Children 2016 to 2036

Source: *id the population experts, Hornsby Shire Forecasts 2019*

## Primary School Age Change

Figure 49 below highlights that Hornsby Shire will see an 11% increase in primary age children (+1,587 persons) between 2016 and 2036. The areas that will see the highest increase in primary schoolers include:

- Hornsby Town Centre (+1,000% or 385 children due to the very low current number of 32)
- Asquith (+90% or 336 children)
- Waitara (+63% or 327 children)
- Hornsby Balance (+9% or 167 children)

Areas which will see a noticeable decline between 2016 and 2036 include Castle Hill, Hornsby Heights and Berowra Heights – North East Rural Balance.

## Population and age structure - persons aged 5 to 11 years

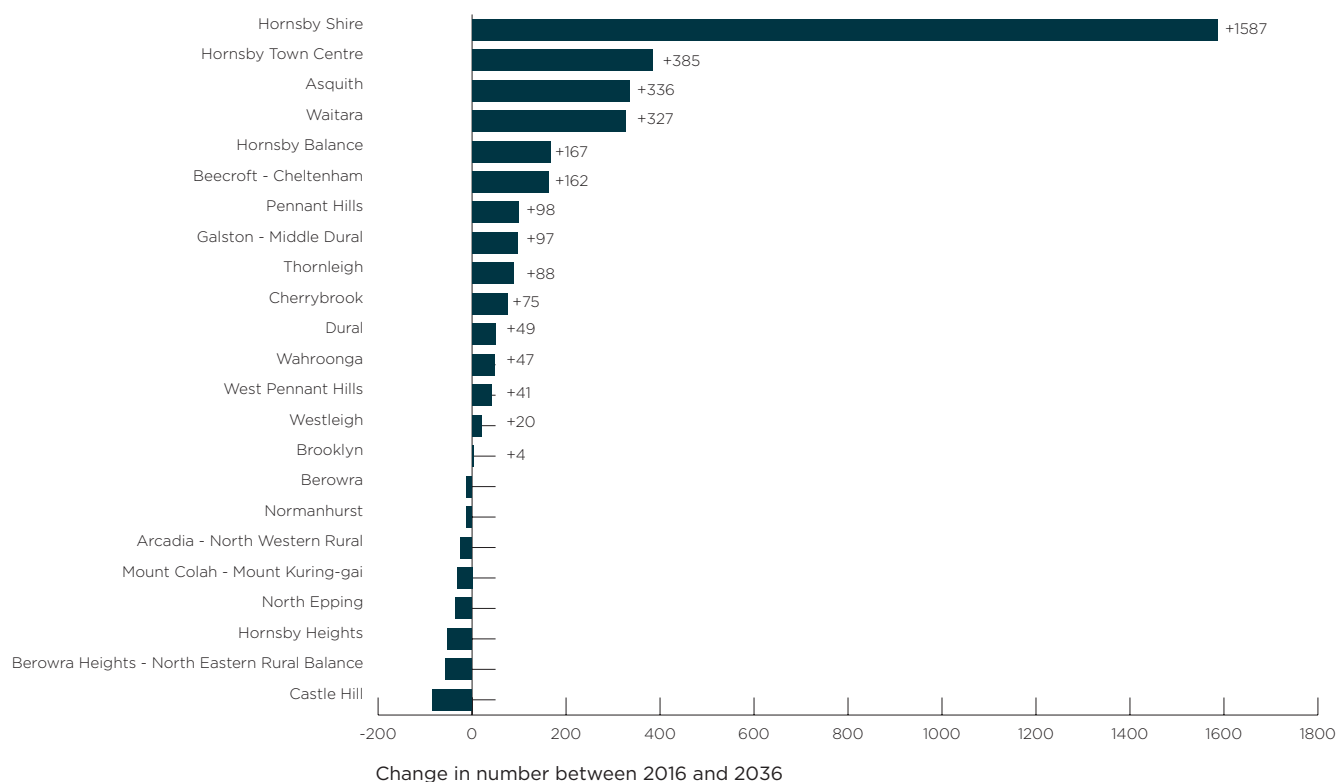


Figure 49: Population and Age Structure - Persons Aged 5 to 11 years

Source: *id the population experts, Hornsby Shire Forecasts 2019*



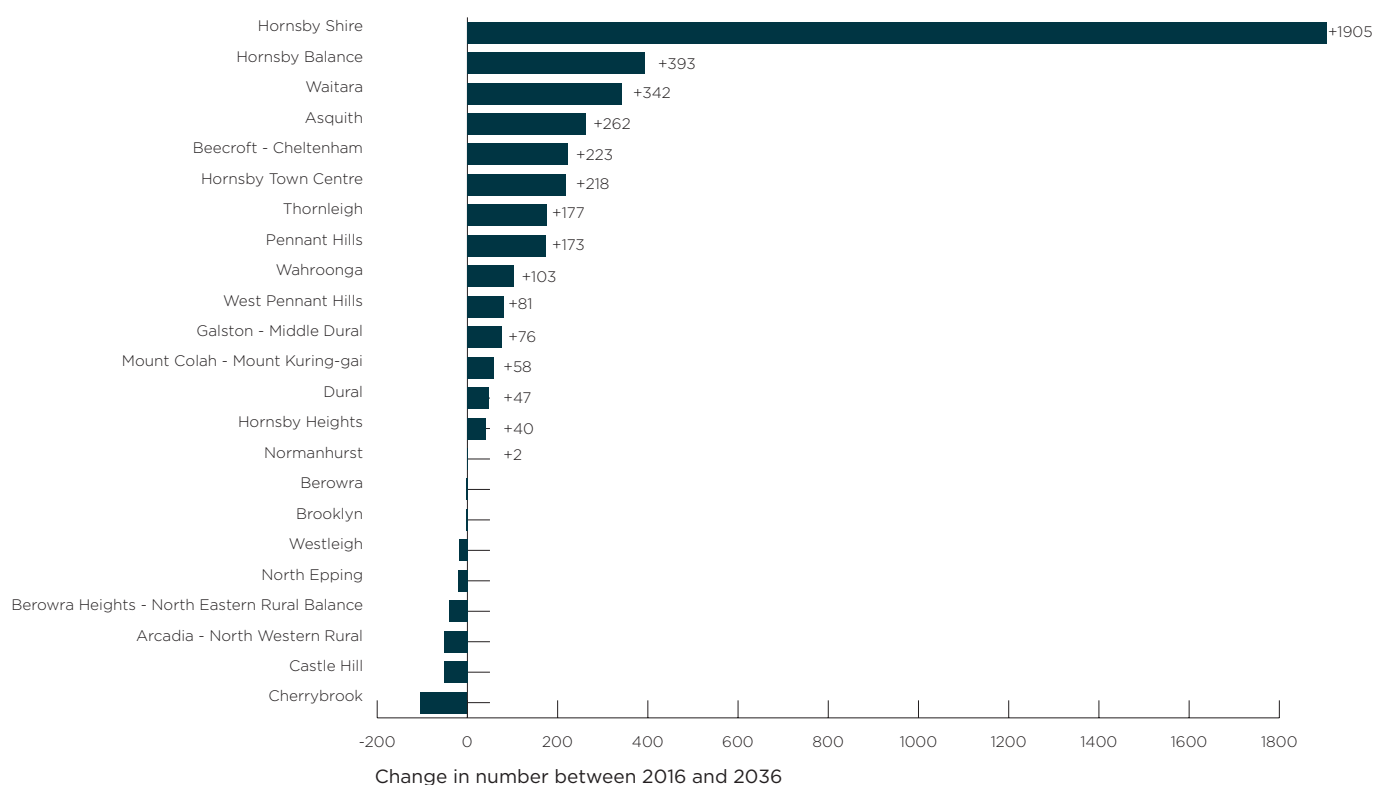
## Secondary School Age Change

Figure 50 below highlights that overall Hornsby Shire will see a 15.9% increase in secondary schoolers (+1,905 persons) between 2016 and 2036. Areas which will see a noticeable increase include:

- Hornsby Balance (+31% or 393 children)
- Waitara (+174% or 342 children)
- Asquith (87% or 262 children)
- Beecroft-Cheltenham (+29% or 223 children).

Areas which will see a noticeable decline include Cherrybrook, Castle Hill, Arcadia – North West Rural and Berowra Heights – North Eastern Rural Balance.

### Population and age structure - persons aged 12 to 17 years



**Figure 50: Population and Age Structure – Persons Aged 12 to 17 years**

Source: *id the population experts, Hornsby Shire Forecasts 2019*



## Child care

Population data indicates that there will be an additional 1,554 pre-schoolers (children aged 0-4 years) in Hornsby by 2036. This is not a significant rise from the previous decade, however the distribution of these age groups is likely to change, with a greater share of the increase in areas with medium and high density development.

Hornsby Shire	2016		2026		2036		Change between 2016 and 2036
Age group (years)	Number	%	Number	%	Number	%	Number
Babies and pre-schoolers (0 to 4)	8,944	6.1	9,812	5.9	10,498	5.8	+1,554

Figure 51: Forecast Increase in Pre-school Age Children 2016 to 2036

Source: id the population experts, Hornsby Shire Forecasts 2019

Projections at 2036 indicate that there will be more children in this age group in Hornsby Town Centre (+500), Asquith (+300) and Cherrybrook (+230).

Areas which are likely to see a decline in the number of pre-schoolers include Berowra Heights – North Eastern Rural Balance, with a modest decline predicted include the area immediately outside the Hornsby Town Centre Review area and West Pennant Hills.

Council will continue to ensure that enough child-care services can be provided through appropriate land use planning. It will also pursue implementing appropriate controls to address the compatibility of centre-based child care facilities in low-density residential areas.

## Health

Hornsby is within the Northern Sydney Local Health District. Health facilities include the Hornsby Ku-ring-gai Public Hospital, which is undergoing a multi-million dollar redevelopment including an expanded Emergency Department to be completed in 2021. Other hospitals include the Madison Day Surgery, Mount Wilga Private Hospital, Perfect Vision Day Surgery and the San Day Surgery adjacent to Hornsby Hospital.

Just outside the Hornsby Shire boundary is the Sydney Adventist Hospital (known as 'the San') which is the largest private and the largest not-for-profit hospital in NSW and the largest employer in the Ku-ring-gai Council area.

Local communities are served by a large number of local general practitioner surgeries (GP surgeries) throughout the Shire.

## Community and Cultural Facilities

The North District Plan priorities under Liveability in relation to community and culture includes:

- Planning Priority N3 – Providing services and social infrastructure to meet people's changing needs
- Planning Priority N4 – Fostering healthy, creative, culturally rich and socially connected communities

Hornsby Shire Council provides five main types of community and cultural facilities: libraries; community and cultural facilities; community land for the provision of scout and guide halls, childhood education and care and, other Council facilities. Benchmarks exist for the provision of community facilities based on population.

The Council's Community and Cultural Facilities Plan is under review. The previous version was adopted by Council in August 2015 and takes into consideration community facilities required for growth areas including Hornsby West Side and the housing precincts identified in the 2011 Housing Strategy. Key population and development assumptions will be updated that take account of the boundary changes with the City of Parramatta Council and future dwelling projections for Cherrybrook Station Precinct and Hornsby Town Centre.

## Open Space

The North District Plan states that all dwellings should be within 400 metres of open space. High density neighbourhoods should have good access to high quality open space that is within close proximity (200m). Provision of active open space needs to reflect the growing demand from the community.



## Areas to be Conserved and Establishing Future Local Character

### Areas to be conserved

Council manages policies, strategies and operates programs to ensure that our bushland, waterways, flora and fauna, heritage, recreation and agricultural land are protected.

These areas include our National Parks and Reserves, Heritage Conservation Areas, Archaeological Sites, lots containing heritage items, biodiversity areas, agricultural land, urban parkland and open space, recreation and play areas and bicycle paths.

These areas are identified in the Council's Local Environmental Plan (LEP) and the Development Control Plan (DCP).

### Local Character Statement Overlays

Section 1.3.2 highlighted that the character of our local areas is defined in a range of existing strategies and reports.

The existing planning controls for residential areas aim to maintain their current character. Council has implemented a Design Excellence Panel and is progressing a Planning Proposal to expand the application of the design excellence clause in the HLEP, which incorporates consideration of local character.

The controls for medium and high-density housing precincts establish a desired future character of high-quality buildings with a limited footprint, sited within landscaped settings.

## 2.5 Analysis of the Evidence Base

This section analyses the data presented in the previous section to determine what the current housing need is, where the gaps are and where the gaps are likely to be in the future.

### State Government Implied Dwelling Need Forecast

The State Government implied dwelling need is 14,476 additional dwellings. However, this is for the period 2016-2041.

Council's projections based on capacity under existing controls and development assumptions for Hornsby Town Centre and Cherrybrook Station government land is 14,879 for the period 2016-2036 which exceeds the State Government figure.

### Gaps in general housing supply

Hornsby does not have a projected housing supply gap. An analysis of the housing demand and supply evidence base detailed in earlier sections confirms this.

- Hornsby has sufficient zoned land and development pipeline capacity to accommodate short to medium term dwelling growth (2016-2026).
- Beyond 2026 existing residential zones, combined with new housing developed through the revitalisation of the Hornsby Town Centre and government land around Cherrybrook, will exceed the State Government's projected housing needs to 2036.

“Hornsby does not have a projected housing supply gap.”



The timing of delivery of new housing is dependent on market forces and the development industry

- **Short-term:** Hornsby is on track to exceed the Shire's 5-year (2016-2021) housing supply target of 4,350 dwellings. This target is set out in the State Government's North District Plan.
- **Medium-term:** Between 2021-2026 the projected housing need will be met by the remaining capacity in the existing housing precincts, infill development potential and the redevelopment of Government-owned land at Cherrybrook Station.
- **Longer-term:** Between 2026-2036 the revitalisation of the Hornsby Town Centre will provide the bulk of the projected dwelling requirement. Council's Hornsby Town Centre Review is currently investigating opportunities for additional housing and jobs to strengthen its role as the major urban and commercial centre of the Shire.
- **Other Opportunities -** Further opportunities may also exist in a future review of the Pennant Hills Road Corridor once the NorthConnex M1/M2 link road is operational, the Pennant Hills Town Centre Review and medium density housing investigations, should Council be provided the opportunity for local controls to apply.

## Specific Needs Housing Gaps

Council recognise that the projected housing supply is likely to offer a high-density residential product. Council will need to plan for a range of dwelling sizes and types to provide a diversity of housing.

The projected demographic profile and market preferences information indicates that is likely to be some mismatch in the type of housing people want and the type of housing to be built in the future, particularly in the Hornsby Town Centre. Many young families with moderate incomes, a growing proportion of older lone person households and retired couples are seeking a different product, often referred to as the 'missing middle' or medium density development, which is generally lacking in the Shire.

In future the supply will still remain predominantly detached dwellings within a growing supply of relatively expensive mainly 2-bedroom new build apartments.







Figure 52: Housing Gaps – Specific Types and Needs

## Studio and 1-bedroom Units

Over the next 20 years more small dwellings will be needed to accommodate the needs of 5,000 additional lone household plus 3,930 additional couples without dependents.

There are currently 8,164 lone person households in Hornsby Shire (2016), and this is projected to increase by 5,100 households by 2036. Nearly 49% of lone person households live in separate houses, 25% in medium density and 25% in high density.

Almost 9% of Hornsby's households were older lone person households (+65 years) compared with 8% in Greater Sydney. Given that most detached houses have 3+ bedrooms, a significant proportion of lone person households may be living in dwellings larger than they need.

Very few studios or one-bedroom units are being built in the current housing precinct areas. Despite growth in 2-bedroom units, the demographic profile of these areas shows these are popular with 25-40 year age groups attracted by access to rail transport. The high cost of buying or renting the units makes them inaccessible to many.

Granny flats may offer an affordable alternative to larger scale apartments in desirable areas. They provide affordable options to an ageing cohort of home-owners seeking to remain in their local community and young adults.

The redevelopment of Hornsby Town Centre offers significant opportunity for delivering options for those looking for accessible high density living.

## Medium Density Dwellings

There is a need for more medium density housing at a price point affordable to families. Earlier sections highlight the preference of 30-49-year groups is for detached housing, however the availability of supply and the cost of housing cause people to make substitutions to their preferences. A survey of estate agents has indicated strong interest from potential buyers for medium density product and that greater diversity of housing was required to meet market demand. Medium density currently only comprises 12.2% of dwelling structure in Hornsby Shire compared with 20% for greater Sydney.

Earlier research identified that 2 storey villas and town houses are attractive to families with children and downsizers. Town houses and villas provide an important price-point with respect to affordability and demand is strong for Torrens title villas and town houses with at-grade parking. The research indicated a strong demand for low rise medium density housing from those +50 age group wishing to downsize.

Many households are being priced out of the Hornsby Shire housing market. The median value of a house was \$1.36M in June 2018. The rent of a 3-bedroom house in Hornsby Shire was \$600 per week in June 2019. These prices are beyond the affordability of many households. This results in people renting for longer, moving to another area or choosing medium and high-density dwellings.



## Gaps in Affordable Rental Housing

There is a limited stock of affordable rental properties for lower income workers, many of whom will be in Hornsby's healthcare and education sectors. Workers in these sectors include teachers, nurses, police, ambulance officers, fire and emergency workers. They are typically paid low to moderate incomes and often constrained by where they can afford to live. Hornsby Shire had a net loss of 1.8% of the key worker population in the 10 years between 2006 and 2016.

Recent figures show that there has been a significant reduction in the number of affordable rental properties available to low income households. Despite a number of new units being built in Hornsby Shire from 2011 to 2016, the proportion of rental housing in Hornsby Shire only increased during that period by 1.4%. Much of this is expensive 2-bedroom apartments.

With only 6.2% of private rental stock now affordable to low income earners and Median house prices at 16 times the earnings of a key worker in Hornsby Shire, it is important that we provide a range of housing options. This will keep key workers in the Shire, provide access to housing options for people on low and moderate incomes and provide additional housing choice and affordability for first home buyers.

Hornsby has prepared an Affordable Housing Discussion Paper which suggests a number of options that could be developed into either a future Affordable Housing Policy or separate strategies and actions. They are specific actions also identified by the North District Plan and include:

- An Affordable Housing Contribution Scheme under State Government policy (SEPP 70) to levy affordable housing contributions. An amendment would be required to be made to the Hornsby Local Environmental Plan 2013 to allow contributions to be collected; or
- An Affordable Rental Housing Target Scheme which would set rental housing targets for low and very-low income households of between 5-10% of additional floor space, generated through a rezoning undertaken as part of the Hornsby Town Centre Review.

## Key Worker Salaries

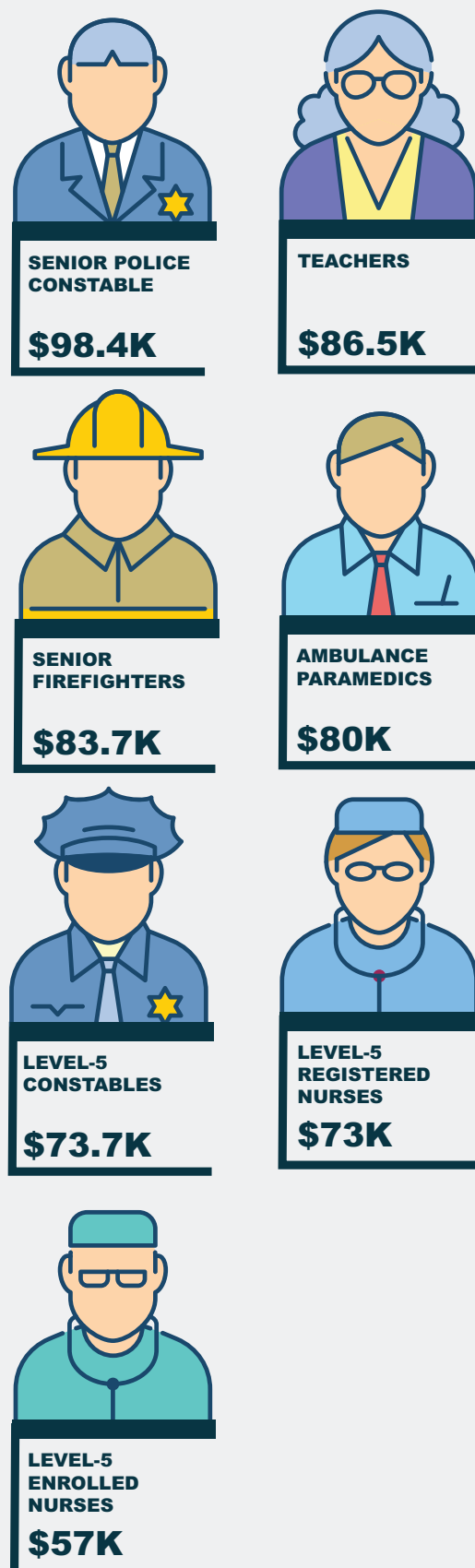


Figure 53: Key Worker Salaries

Source: Teachers Mutual Bank



## Areas with Development Capacity

Areas with development capacity for future housing potential include the current Housing Precincts, Cherrybrook Station Precinct (Government land) and Hornsby Town Centre.

The housing precincts are already zoned for housing but have capacity remaining up to 2041.

Government land at Cherrybrook Station has been nominated as a State Significant Precinct, with the rezoning to be led by the Department of Planning, Industry and Environment.

Council has committed to the revitalisation of Hornsby Town Centre. The planning study currently underway is investigating opportunities for housing and jobs.

All these areas, along with infill development are expected to meet the Council's contribution to the North District's 20-year housing targets and population projections.

Details of these areas are provided in the tables below.

Housing Precincts	
<b>Location:</b>	There are currently 20 housing precincts in Hornsby Shire. The precincts are concentrated in key areas near transport and services identified on the adjacent map. Key clusters include Asquith, Mount Colah and Waitara. These precincts were identified in the 2011 Housing Strategy.
<b>Dwellings Constructed/Under Construction:</b>	Estimated 3,411 (45%)
<b>Future Dwellings with Development Applications Approved, Under Assessment or in Pre-Lodgement:</b>	Estimated 1,199 (16%)
<b>Future Dwellings Awaiting Development Applications:</b>	Estimated 2,910 (39%)
<b>Precincts:</b>	20 Housing Precincts rezoned in 2011
<b>Dwellings types:</b>	Mainly 5 storey units
<b>Timeframe for delivery:</b>	ongoing to 2036
<b>Current planning controls:</b>	R4 (High Density Residential) R3 (Medium Density Residential)
	Capacity exists No further rezoning required
<b>Areas with significant remaining capacity:</b>	Capacity for nearly 3,000 dwellings exists in the precinct areas, not yet subject to Development Applications (DAs).
<b>Areas with more than 50% dwelling capacity remaining in the zoned precinct areas, not subject to development applications include:</b>	Galston Road, Hornsby; Old Berowra Road, Hornsby; Mildred Avenue, Hornsby; Palmerston Road, Waitara; Thomson's Corner, Pennant Hills.

Figure 54: Development Capacity Hornsby Housing Precincts

Source: id the population experts, Hornsby Shire Forecasts 2019. Hornsby Council DA review to January 2020.



### Cherrybrook Station Precinct – Government Land

Cherrybrook Station Precinct is currently subject to a precinct planning process by the Department of Planning, Industry and Environment (DPIE) which is now focused on the government land only. The new Cherrybrook Metro Station opened in May 2019 – part of the State Government's Sydney Metro Northwest project.

<b>Location:</b>	The Cherrybrook Station Precinct (Government land) is wholly within Hornsby Shire. The southern boundary adjoins Castle Hill Road which forms the boundary with The Hills Shire. Castle Hills Road is the main regional traffic route through the area.
<b>Strategic issues</b>	The regional implications of the Cherrybrook Station Precinct, particularly with regard to road infrastructure and capacity, means that no proponent led planning proposals will be considered by Council until the level of State Government involvement to support local and regional infrastructure is understood.
<b>Collaboration:</b>	Council has continued to reiterate the importance of finalising the technical studies and Precinct Plan for the entire precinct to deliver an integrated land use and transport strategy and to provide certainty for the community.
<b>Precinct area:</b>	the 3.5 ha site is owned by State Government
<b>Current planning controls:</b>	R2 (Low Density Residential)
<b>Potential additional dwellings:</b>	800
<b>Dwellings types:</b>	mix of dwelling types and sizes
<b>Timeframe for delivery:</b>	3 - 5 years
<b>Key issues:</b>	Infrastructure capacity and funding, affordable housing
	Government-led state significant rezoning process currently underway

Figure 55: Development Capacity Cherrybrook Station Precinct



## Hornsby Town Centre Review and Future Masterplan

Council is undertaking the Hornsby Town Centre Review (HTCR) to investigate and provide opportunities for additional housing and to strengthen its role as the major urban and commercial centre of the Shire. The HTCR commenced in 2019.

<b>Location:</b>	The Precinct encompasses land to the east and west of the rail line as well as the rail land itself. The east side includes Westfield Hornsby, Hornsby Mall and the businesses located along George Street up to Bridge Road. The west side is bounded by Hornsby RSL Club to the south and includes all the businesses on Peats Ferry Road, in William and Dural Streets, up to Bridge Road to the north.
<b>Strategic issues</b>	<p>Creating a strategic framework to facilitate the revitalisation of the Hornsby Town Centre.</p> <p>Hornsby Town Centre is a Strategic Centre within the North District. Hornsby Railway Station is a regional transport hub and interchange.</p> <p>Future housing growth will be concentrated in the town centre near transport, jobs, education and services.</p>
<b>Precinct area:</b>	TBC
<b>Current planning controls:</b>	B3 (Commercial Core), B4 (Mixed Use), B5 (Business Development)
<b>Potential additional dwellings:</b>	3,500+
<b>Dwellings types:</b>	high density in a mix of 1, 2 and 3 bedroom dwellings
<b>Timeframe for delivery:</b>	6-10 years
<b>Key issues:</b>	site assembly, heritage, design, funding, transport and local infrastructure, affordable housing, public domain and landscaping, infrastructure capacity and funding, affordable housing
	Council-led planning study currently underway

Figure 56: Development Capacity Hornsby Town Centre



## Hornsby Shire 20-Year Housing Target Numbers Overview

Timeframe	Hornsby Pipeline	Significant Sources of Supply	Target required by State Government
<b>Short-term 2016-2021</b>	4,459	Hornsby is on track to exceed the Shire's 5-year (2016-2021) housing supply target of 4,350 dwellings. This is directly attributable to the Housing Strategy precincts rezoned in 2011. No further re-zonings are required.	4,350
<b>Medium-term 2021-2026</b>	3,776	There will be remaining capacity in the existing housing precincts identified in the 2011 Housing Strategy, along with infill development potential. Combined with the potential redevelopment of Government-owned land around Cherrybrook Station, we forecast a minimum of 3,776 homes, meaning we are well on our way to meeting medium term housing target.	3,800 – 4,200
<b>Long-term 2026-2036</b>	6,500 to 7,500	Council forecasts suggest there is the potential to create between 6,500 and 7,500 new dwellings between 2026 to 2036. The revitalisation of the Hornsby Town Centre will provide the bulk of these new homes to meet our housing targets. Council is currently undertaking the Hornsby Town Centre Review to investigate opportunities for additional housing and jobs to strengthen its role as the major urban and commercial centre of the Shire.	TBC
<b>20 year timeframe 2016-2036</b>	14,879	<b>14,879 forecast supply</b> <ul style="list-style-type: none"> <li>■ 42% from housing precincts</li> <li>■ 40% zoned land (includes Hornsby West and infill)</li> <li>■ 18% State Government land at Cherrybrook &amp; Hornsby Town Centre</li> </ul>	TBC

Figure 57: Hornsby Shire 20-Year Housing Target Numbers Overview



# Section 3 The Priorities



Support community well-being through the provision of housing that is affordable and appropriate to household needs and preferences in terms of choice and location, while protecting and enhancing local surroundings and the natural environment.



- Hornsby Shire's Housing Vision

This section sets out Council's Local Housing Strategy objectives which reflect strategic priorities and principles.

## 3.1 The Local Housing Strategy Objectives

Council's Housing Strategy objectives are consistent with A Metropolis of Three Cities – Greater Sydney Region Plan and the North District Plan.

Figure 58 provides an overview of how Hornsby's draft housing objectives respond and relate to key strategic policy objectives.





Figure 58: NSW Government and Hornsby Housing Objectives



## Objective 1:

Promote design excellence to ensure new housing delivers high quality buildings and an urban realm that respects current and future desired local character, green spaces and landscaping.

**The LSPS provides direction to ensure that new housing delivers and contributes to our high quality environment.**

**The Hornsby Local Environmental Plan (HLEP) and Development Control Plan (DCP) planning controls guide dwelling mix, sizes and design considerations. These controls guide the types and sizes of market housing and design quality.**

**The planning controls for the medium and high density residential controls are form-based controls that aim to achieve the desired future character of the locality that includes high quality buildings with a limited footprint, sited within a landscaped setting.**

- **Council has recently created a Design Excellence Advisory Panel**
- **Council has exhibited a Planning Proposal to expand the application of the Design Excellence Clause.**

## Link to Key Hornsby LSPS Actions

LA3. Council continue to advocate for changes to State policy for medium density housing to enable Council to progress its own strategy that reflects local character.

LA5 Prepare and adopt the Design Excellence Planning proposal and forward to DPIE for Gateway Determination

LA6. Work with the State Government to make changes to State Environmental Planning Policies and Design Guides for the Low Rise Medium Density Housing Code and Apartment Design Guide

LA15. Finalise the Hornsby Town Centre Review and incorporate relevant findings and recommendations into a future update to the Hornsby Local Housing Strategy.

LA16. Finalise an update to the Hornsby Local Housing Strategy including a local character statement for public exhibition.



## Objective 2:

Ensure new housing development minimises environment impact and promotes ecologically sustainable development .

**Hornsby Shire is committed to ensuring that our strategic priorities reflect environmental sustainability principles.**

**The natural environment is our most important resource and we will continue to protect our bushland, waterways and biodiversity from harm.**

**Future new housing will be focused in urban areas to protect environmentally sensitive areas.**

**Development controls will identify minimum environmental standards for design and construction, which includes energy, waste and water efficiency.**

**New development will also incorporate appropriate landscaping and planting to reduce future heat vulnerability.**

- **Council is undertaking a range of studies to ensure the Shire reduces carbon emissions and is resilient and able to respond to climate change events and stresses.**
- **Council is keen to protect our urban forest, which is important to the Shire's liveability, community and wellbeing. Increasing urban tree canopy cover, developing cooler, greener places and strengthening connections to the Green Grid is a key priority.**
- **Trees loss on private residential land is the most pressing risk to our canopy cover.**

## Link to Key Hornsby LSPS Actions

LA1. Continue with a concentrated housing model in existing housing precincts.

SA2. Develop an Environmental Sustainability Strategy which will provide an overarching framework to address environmental sustainability issues facing the Shire. This strategy will cover the areas of Urban Forest, Biodiversity, Climate Change, Walking & Cycling, Waste, and Water Sensitive Cities and Urban Heat.

SA3. Complete the Coastal Management Plan Scoping Study for the Hawkesbury Estuary.

SA4. Finalise the Water Sensitive Hornsby project

SA5. Finalise the Biodiversity Conservation Management Plan and associated Action Plan.

SA7. Finalise the Urban Forest Strategy

SA13. Finalise Waste Strategy.

SA17. Finalise Climate Change Mitigation and Adaptation Plan

SA21. Finalise Hornsby Bushfire Management Strategy

SA23. Finalise Hornsby Flood Plain Risk Management Plan.



## Objective 3:

Protect sensitive areas from development, and ensure new housing does not detract or erode an area's local character.

**Over 70% of the Shire is unsuitable for future housing development. This includes the national parks and reserves, waterways, bush-fire prone areas and protected biodiversity areas.**

**Other areas that should be protected include our Metropolitan Rural Land and Heritage Conservation Areas.**

**Council is concerned about the consequences of future development to our local areas through State Government Strategic Environmental Planning Policies (SEPPs) which bypass local development controls, these include:**

**Unplanned and unsustainable growth of Seniors Housing permitted by State Government through Site Compatibility Certificates in our rural areas.**

- **Potential impact on local character and infrastructure via the State Government's 'Low Rise Medium Density Housing Code'. The Code is intended to encourage more medium density housing to create more housing choice through a streamlined process. However, the Code's planning controls are inconsistent with the Council's local planning approach.**
- **Potential impact on local character from child care centres approved under the State Government's 'Education and Child Care SEPP'.**

**Many of our low density neighbourhoods have particular characteristics and streetscape design. Council supports a more place based approach reflecting a tailored and fine grain approach to development standards.**

## Link to Key Hornsby LSPS Actions

LA14. Undertake the tasks to complete Hornsby Comprehensive Heritage Study.

LA18. Work with the Rural Fire Service to support protection of life and property with no additional density increases north of Yirra Road, Mount Colah until the RFS has developed a Bushfire Risk Evaluation Model and Management Planning for the Shire and confirmed its position regarding development north of Yirra Road.

SA11. Finalise the Rural Lands Study

SA12: Continue to partner with the Greater Sydney Commission to advocate for changes to State planning policy to deliver an appropriate outcome for seniors housing that will protect rural lands.

SA9. Finalise the Rural Lands Study

CA4. Finalise the Brooklyn Place Plan.

CA5. Finalise the Pennant Hills Place Plan.



## Objective 4:

Identify opportunities to encourage housing diversity including medium density, adaptable housing for the aging and multi-unit housing in areas of limited choice and availability.

**Future housing supply will be focused on precinct areas and in the Hornsby Town Centre.**

**Council recognises there is demand for more housing choice and diversity to cater for the expected age, income and household type in the Shire.**

**Medium density housing is in short supply which includes townhouse and semi-detached houses.**

**Council is keen to explore opportunities to deliver small lot, low rise (max 2 storey) medium density housing types as well as more traditional townhouse forms.**

**Further discussions with the community to review opportunities for a range of medium density development housing types will be needed.**

**If Council is provided the option to prepare local controls for medium density housing that are reflective of the landscape setting of the Shire, investigations could commence into appropriate expansion of the R3 Medium Density zone. The planning controls in the Code are inconsistent with Council's local planning approach of encouraging medium density housing within a landscape setting.**

**Council will continue to explore opportunities to encourage more housing diversity in Hornsby Town Centre and the rest of the Shire.**

## Link to Key Hornsby LSPS Actions

LA3. Council continue to advocate for changes to State policy for medium density housing to enable Council to progress its own strategy that reflects local character.

LA4. If Council is provided the option to prepare local controls for medium density housing that are reflective of the landscape setting of the Shire, investigations could commence into appropriate expansion of the R3 Medium Density zone.

LA6. Work with the State Government to make changes to State Environmental Planning Policies and Design Guides for the Low Rise Medium Density Housing Code and Apartment Design Guide

LA17. Prioritise the findings and recommendations from the Affordable Housing Discussion Paper including the preparation of an affordable rental housing scheme under SEPP 70.

SA8. Commence a review of the Pennant Hills Road corridor following the opening of NorthConnex.

PA1. Complete the Hornsby Town Centre Review.

PA2. Complete the Pennant Hills Town Centre Review



## Objective 5:

Promote sustainable locations for housing growth close to transport, which support the role of centres, have adequate infrastructure and maximise opportunities through collaboration.

**Council will continue to prioritise sustainable locations to deliver future housing supply. These are close to transport and local services that will encourage patronage of public transport, walking and cycling.**

**The areas include:**

- Existing housing precincts
- Hornsby Town Centre
- Cherrybrook Station Precinct

**Cherrybrook Station Precinct represents government owned land adjacent to the new metro station. It has been identified as a State Significant Precinct.**

**Council is seeking to resolve the local and regional infrastructure issues facing Cherrybrook and surrounding areas as a result of the opening of Cherrybrook Metro Station.**

## Link to Key Hornsby LSPS Actions

LA1. Continue with a concentrated housing model in existing housing precincts.

LA2. Focus future housing opportunities in the Hornsby Town Centre

LA7. Investigate value sharing models and options that can deliver social infrastructure and other community benefits.

LA8. Finalise the update of the Community and Cultural Facilities Strategic Plan.

LA9. Finalise Public Domain Guidelines and Signage Strategy

LA10. Finalise the Hornsby 7.12 Development Contributions Plan 2019-2029.

LA11. Finalise the draft Hornsby 7.11 Development Contributions Plan 2019-2029 for public exhibition.

CA1. Advocate to State Government regarding the status and finalisation of the updated Structure Plan for the Cherrybrook Station Precinct.

CA2: Collaborate with the State Government and Landcom concerning planning for government-owned land adjoining the Sydney Metro Northwest corridor and not support proponent-led planning proposals for any other lands within the Cherrybrook Station Precinct until planning for the government-owned lands is completed with an integrated community facilities, open space, transport and infrastructure strategy incorporating the wider precinct.

CA3. Commence a review of the Pennant Hills Road Corridor, subsequent to the opening of NorthConnex.







## Objective 6:

Ensure housing growth aligns with the Region and District Plan priorities, planned infrastructure growth and will deliver the District Plan housing targets.

**Council has prepared the Hornsby Local Strategic Planning Statement (this document) which provides strategic priorities related to housing.**

**This Local Housing Strategy demonstrates that Hornsby short-term housing targets (2016-2021) will be comfortably met.**

**In the medium term the zoned housing precincts along with government land at Cherrybrook provide sufficient pipeline to 2026.**

**Hornsby Town Centre will provide the first stage of longer term housing capacity to deliver a mix of housing.**

## Link to Key Hornsby LSPS Actions

LA16. Finalise an update to the Hornsby Local Housing Strategy including a local character statement for public exhibition (this document)



## 3.2 Land Use Planning Approach

This section includes maps of the proposed land use planning approach to deliver additional housing to meet the objectives set out in Section 3.1

Continue with concentrated housing model in existing housing precincts

Manage housing delivery in the Cherrybrook Station Precinct through collaboration with State Government

Focus future housing opportunities in the Hornsby Town Centre

Commence a review of the Pennant Hills Road Corridor subsequent to opening NorthConnex

If provided with the option for local controls, commence investigations into appropriate locations for medium density housing

### Continue with Concentrated Housing Model in Existing Housing Precincts

There is significant remaining capacity under existing zoning and planning controls in the housing precincts.

Remaining capacity in the precincts is identified in the maps at Appendix 2.



Image: Hornsby Town Centre



# Existing Housing Precincts

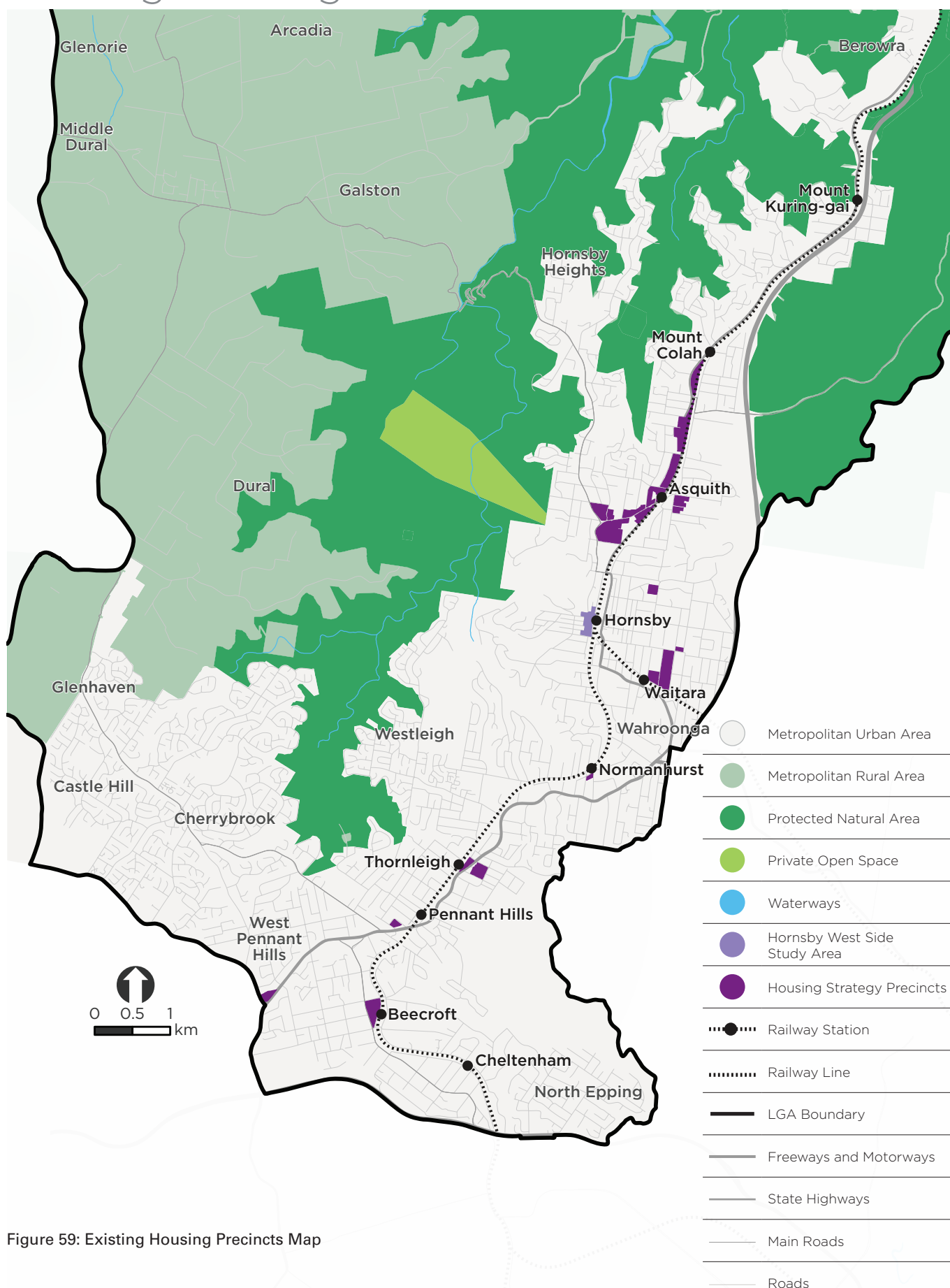


Figure 59: Existing Housing Precincts Map



## Manage Housing Delivery in the Cherrybrook Station Precinct through Collaboration with State Government.

The Minister for Planning and Public Spaces has nominated the State-owned land at Cherrybrook Metro Station as a State Significant Precinct (SSP).

Under the State led, State Significant Precincts approach to the rezoning of the Government land at Cherrybrook Station, a set of study requirements has been prepared setting out the scope of the technical studies required to support the investigations for the proposed rezoning.

Council welcomes the opportunity to engage with the DPIE throughout the process.

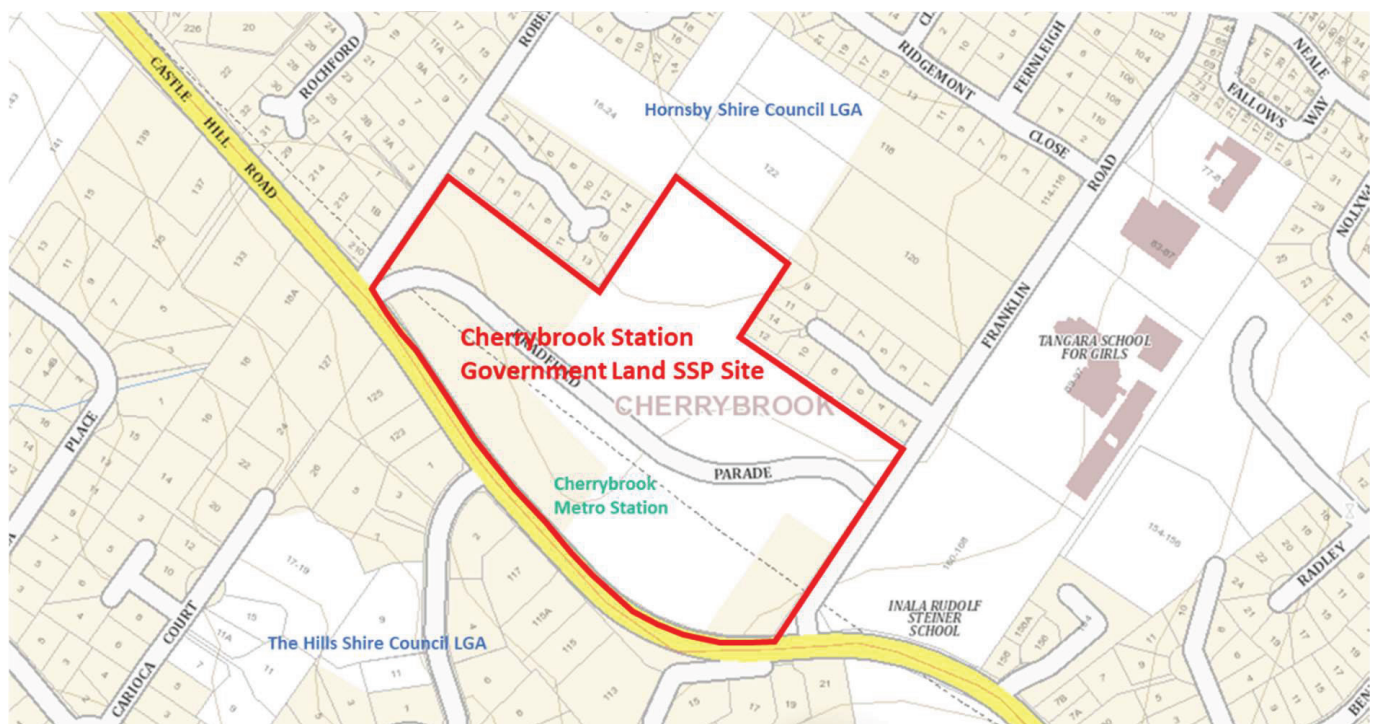


Figure 60: Cherrybrook Station Government Land State Significant Precinct (SSP)

Source: DPIE NSW



## Focus Future Housing Opportunities in the Hornsby Town Centre

Council has committed to the Hornsby Town Centre Review. The Hornsby Town Centre (HTC) is our major commercial centre and is nominated as a strategic centre under the North District Plan. HTC plays a critical role in providing employment, social and retail services for residents both within and surrounding Hornsby LGA. It has good connectivity to other areas of Sydney and the Central Coast via the local and regional road network and rail network. Opportunities to expand its future employment

role and residential role are being investigated under the Review.

To achieve a transformation of this scale we are working closely with key stakeholders within Hornsby Town Centre and a range of State Government Departments and Agencies. Successful delivery of the key outcomes will require partnership and collaboration throughout the life of the project.



Figure 61: Hornsby Town Centre Review Study Area





Image: Pennant Hills road

## Commence a Review of the Pennant Hills Road Corridor Subsequent to Opening NorthConnex

It is expected that traffic on Pennant Hills Road and surrounding local roads will ease providing future opportunities to revitalise Pennant Hills Town Centre. There are plans for a future review of the Pennant Hills Road corridor which will consider land use, movement and place.

## Commence Investigations into Medium Density Housing Provision, subject to changes to the Medium Density Code

The controls in the Code are inconsistent with local area planning and Hornsby Council's approach of encouraging medium density housing within a landscape setting.

If Council is provided the option to prepare local controls for medium density housing that are reflective of the landscape setting of the Shire, investigations could commence into appropriate expansion of the R3 Medium Density zone to provide additional housing opportunities.



## 3.3 Mechanisms to Deliver Options

The following mechanisms will be required to deliver specific housing types.

Project	Mechanisms	Responsibility
Concentrated housing model in existing precincts	Timely Assessment of Development Applications	Hornsby Shire Council
Hornsby Town Centre (HTC)	Master planning Public domain plans Contribution plans Planning proposal and development controls Amendment to HLEP and HDCP	Hornsby Shire Council
Cherrybrook Station State Significant Precinct	State Significant Rezoning SEPP Amendment or HLEP Amendment	State Government with collaboration from Hornsby Shire Council
Review of Pennant Hills Road Corridor	Scope TBC	Hornsby Shire Council
Pennant Hills Town Centre Review	Master planning Planning proposal and development controls Amendment to HLEP and HDCP	Hornsby Shire Council
Medium density housing opportunities	Baseline demand and supply studies Investigation of housing typologies and land suitability Precinct plans Planning proposal and development controls Amendment to HLEP and HDCP	Hornsby Shire Council

Figure 62: Planning for Hornsby Housing



## Questions for the community

The Housing Strategy has identified a growing need for a diversity of housing types to meet future household types. This includes seniors housing, medium density housing and affordable housing. At the same time we understand the community wish to see lower density suburbs and environmentally constrained areas safeguarded from incompatible development.

### Question 1

How do we protect the character of our low density neighbourhoods while also providing a mix of housing types (not just single dwellings) to meet the needs of the community?

### Question 2

Given the growing elderly population and the pressure for seniors housing in Hornsby. What type of seniors housing should we provide and where should this be located?

### Question 3

Local character statements recognise the special characteristics of a place or desired character. They can be used to help manage change into the future. What areas in the Shire would benefit from local character statements?





# Section 4 Actions

## Implementation and Delivery Plan

Council has committed to the Accelerated Local Environmental Plan Review program, which includes the preparation of a range of studies that will inform future changes to our local land use plans, strategies and policies. The immediate and short-term focus will be the finalisation and implementation of these technical studies and strategies.

The HLHS will be implemented in accordance with the Liveable Actions of the Action Plan in the Local Strategic Planning Statement.

## Planning Proposal

A planning proposal will be prepared for amendments to the Hornsby Local Environmental Plan 2013 to give effect to vision for the Hornsby Town Centre. It is anticipated that the planning proposal will be prepared following the completion of the necessary technical reviews and studies to inform and support the proposal.

A further amendment may be prepared to give effect to any recommendations for additional land to be zoned R3-Medium density Residential.

## Monitoring and Review

Council will establish an annual and 5 yearly review to monitor the progress of the Housing Strategy. The 5 yearly review will align with the updates of the District and Regional Plan. The housing strategy may also be reviewed on an as needed basis in response to the release of revised new housing targets or state housing policy that has implications for Hornsby Shire and its housing



Liveable Priorities and Actions	Relevant Council Plans	Key Performance Indicators	Expected Timeframe
<b>LP1. Protecting the character of our low density neighbourhoods.</b>			
LA1. Continue with a concentrated housing model in existing housing precincts as identified in Figure 15.	LHS	Updated LSPS	2020
LA2. Focus future housing opportunities in the Hornsby Town Centre.	HTCR	Completed HTCR	2020
LA3. Council continue to advocate for changes to State policy for medium density housing to enable Council to progress its own strategy that reflects local character.	Further strategic work required	Seek State Government response	Ongoing
LA4. If Council is provided the option to prepare local controls for medium density housing that are reflective of the landscape setting of the Shire, investigations could commence into appropriate expansion of the R3 Medium Density zone.	Further strategic work required	Seek State Government response	Ongoing
<b>LP2. Promoting design excellence for new housing.</b>			
LA5. Prepare and adopt the Design Excellence Planning Proposal and forward to Department of Planning, Industry and Environment for a Gateway Determination.	HLEP2013	Adopted planning proposal	December 2019
LA6. Work with the State Government to make changes to State Environmental Planning Policies and Design Guides for the Low Rise Medium Density Housing Code and Apartment Design Guide.	Further strategic work required	Seek State Government response	Ongoing
<b>LP3. Supporting the development of community and cultural facilities that will adequately service our current and future community.</b>			
LA7. Investigate value sharing models and options that can deliver social infrastructure and other community benefits.	HTCR LHS	Finalised HTCR and LHS	2020/21
LA8. Finalise the update of the Community and Cultural Facilities Strategic Plan.	LSPS	Updated LSPS	2020
<b>LP4. Aligning the delivery of local infrastructure and public domain improvements with current and future growth.</b>			
LA9. Finalise Public Domain Guidelines and Signage Strategy.	LSPS	Updated LSPS	2020
LA10. Finalise the Hornsby 7.12 Development Contributions Plan 2019-2029.	7.12 Plan	Adopted 7.12 Plan	2019
LA11. Finalise the draft Hornsby 7.11 Development Contributions Plan 2019-2029 for public exhibition.	7.11 Plan	Adopted 7.11 Plan	2020

Figure 63: Liveable Priorities and Actions LSPS and Hornsby Housing Strategy



Liveable Priorities and Actions	Relevant Council Plans	Key Performance Indicators	Expected Timeframe
<b>LP5. Protecting, conserving and promoting our natural, built and cultural heritage.</b>			
LA12. Prioritise and adopt recommendations from the Hornsby Heritage Action Plan 2019.	LSPS	Updated LSPS	2020
LA13. Develop consultant brief for the Comprehensive Heritage Study based on the findings of Action LA12.	LSPS	Updated LSPS	2020
LA14. Undertake the tasks to complete Hornsby Comprehensive Heritage Study.	LSPS	Updated LSPS	2020
<b>LP6. Providing housing in the right locations that meets the needs of our community with regard to housing type and mix, design, sustainability, affordability and safety.</b>			
LA15. Finalise the Hornsby Town Centre Review and incorporate relevant findings and recommendations into a future update to the Hornsby Local Housing Strategy.	LHS	Finalised LHS	2020
LA16. Finalise an update to the Hornsby Local Housing Strategy including a local character statement for public exhibition.	LHS	Finalised LHS	2020
LA17. Prioritise the findings and recommendations from the Affordable Housing Discussion Paper including the preparation of an affordable rental housing scheme under SEPP 70.	LSPS	Updated LSPS	2020
LA18. Work with the Rural Fire Service to support protection of life and property with no additional density increases north of Yirra Road, Mount Colah until the RFS has developed a Bushfire Risk Evaluation Model and Management Planning for the Shire and confirmed its position regarding development north of Yirra Road.	Further strategic work required	Finalised Bushfire Risk Evacuation Model and Management Plan	Ongoing
<b>LP7. Promoting the arts, creative industries and temporary uses as well as the night-time economy.</b>			
LA19. Consider the potential for the night-time economy in the Hornsby Town Centre Review, Economic Development and Tourism Strategy, Pennant Hills Place Plan and other opportunities across the Shire	HTCR LSPS	Completed HTCR Updated LSPS	2020









YOUR VISION.  
YOUR FUTURE.

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# Housing Strategy Appendix 1 Demographic Profile



## APPENDIX 1

### 1.1 Demographic Overview

This section has been prepared using data from the 2016 census and the *Hornsby Shire Population Projections Report, 2016-2036* prepared by .id the Population Experts. Where relevant the DPIE projections have been referenced.

This section outlines the demographic indicators of social and economic factors.

#### 1.1.1 Demographic Overview

The estimated resident population of Hornsby Shire in June 2018 was **150,752 people**.

Since 2006 the population has increased by 14,590 people of which a high proportion has been in family age groups.

The Shire attracts families but tends to lose young adults (18-25 years) and the 50-69-year age groups through migration. This reflects a lack of housing options and general housing affordability as well as poor access to tertiary education compared to other areas in the Sydney metropolitan area.

As with other areas of Sydney the main impetus for growth in recent years has been from overseas migration.

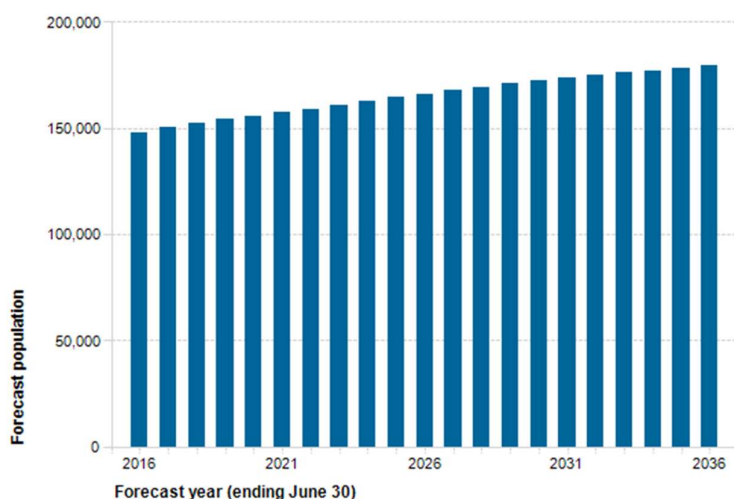
The number of births and deaths to 2036 maintain a steady population. Births will rise from 1,526 births per year in 2017 to 1,912 in 2036.

Hornsby Shire's population growth was subdued between 2011 and 2016 but is forecast to increase on average 1% per annum from 2016 – 2036, equal to 31,921 persons. Figure 1 illustrates the projected growth from 147,661 in 2016 to 179,582 people in 2036.

**Figure 1 - Hornsby Forecast Population Growth to 2036**

#### Forecast population

Hornsby Shire



Population and household forecasts, 2016 to 2036, prepared by .id, February 2019.

**.id** the population experts

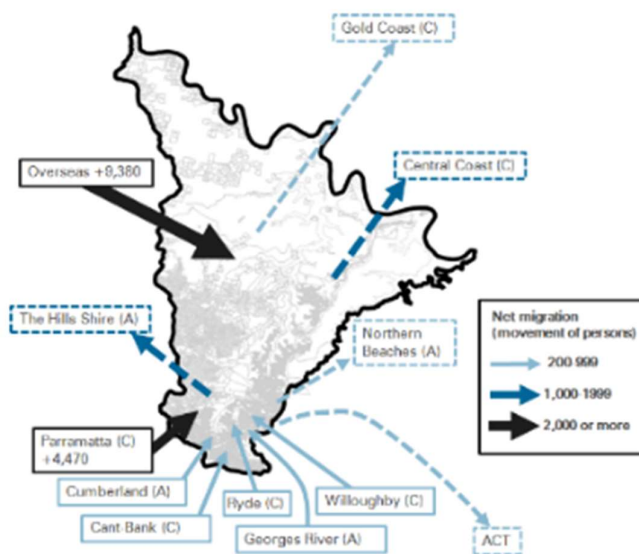


### 1.1.2 Migration

In net terms, the migration flows in and out of Hornsby Shire tend to cancel themselves, with the in-migration of overseas migration providing the main impetus for growth. Between 2011 and 2016 the largest sources of population growth to the Shire are from Parramatta, Ryde, Cumberland and Willoughby council areas. Out-migration was primarily to the Central Coast, the Hills Shire and Northern Beaches. The largest net gain was from overseas residents.

**Figure 2 - Historical migration flows, Hornsby shire 2011-2016**

Historical migration flows, Hornsby Shire, 2016-2011



Population and household forecasts, 2016 to 2036, prepared by i.d. the population experts, February 2019.

i.d.  
the population experts

### 1.1.3 Population Projections

#### ***The population is growing by 1% per annum***

Population is forecast to grow at a higher rate from 2016-2021, aligned with rates of residential development. As residential opportunities are exhausted the population growth will slow over time.

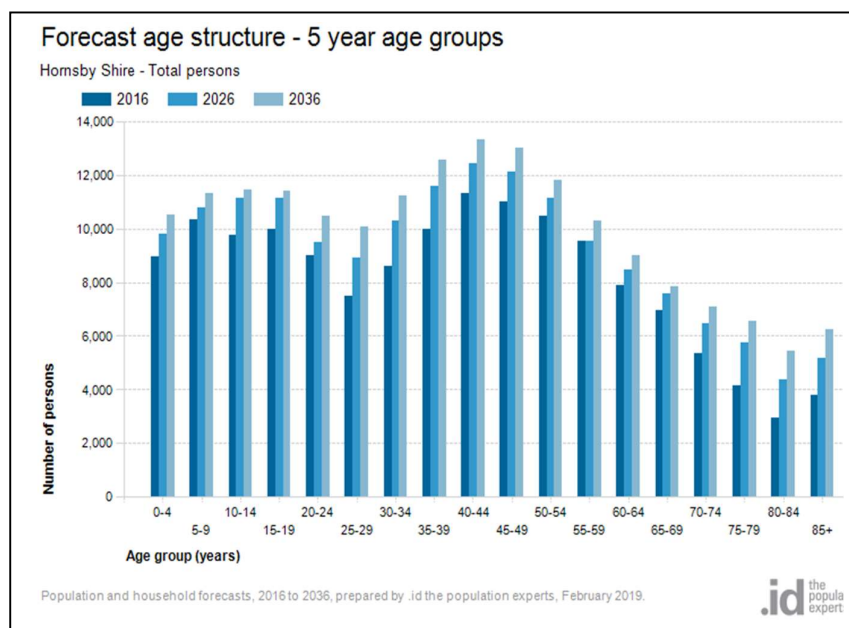
Adjacent Councils including Ku-ring-gai, The Hills Shire and Parramatta are also expected to experience higher annual growth rates of around 1.2%, 4% and 4% respectively<sup>1</sup>.

#### ***Net population increases are expected in all age groups to 2036***

Figure 3 below highlights the projected growth for all age groups at 2016, 2026 and 2036. In particular, there is an in-migration of a youthful cohort, in stark contrast to the previous 15 years, when ageing dominated. The dominant age group in the Shire in 2016 was 40 to 44 years old (7.7% of total persons) and this will continue to be the largest group in 2036 with 13,331 persons. Castle Hill has the highest proportion of people aged over 65 years (1,893 persons or 33.2%), followed by Galston -Middle Dural.

<sup>1</sup> Numbers base on the NSW Population Projections Sydney Metro LGA data 2016



**Figure 3 - Hornsby Forecast Growth by Age to 2036**

By 2036 a higher percentage of the population will be in the *over 70 years age groups*. This will increase from 11% to 14.1% of the resident population. In contrast, the population in the *under 20 years age groups* will have fallen from 26.5% to 24.8%

### 1.1.4 Future Trends

#### Population groups

Important population trends between 2016 and 2036 which will have implications for the provision of State and local services include:

- **30 to 34 age group** will see the largest increase in persons - 2,622 persons. This is closely followed by the **25 to 29 age group** (2,578 persons) and the **35 to 39 age group** (2,570 persons). These combined groups (25 to 39) will account for 18.8% of the population in 2036 or 33,867 persons.
- **young children:** there will be an additional 1,554 children aged 0-4 years.
- **school age children:** there will be an additional 942 children aged 5 to 9 years; an additional 1,710 children aged 10 to 14 years and an additional 1,392 children aged 14 to 19 years. This group will comprise a smaller share of the population.
- **retirees:** low growth in the 50-69 age group
- **elderly population (+85 years):** predicted to increase from 2.6 % to 3.5% over 20 years. This equates to an increase of 2,420 persons.
- **aged care residents:** predicted to increase by 36.56% (679 persons). From 1,860 persons in 2016 to 2,540 persons in 2036.

### 1.1.5 Comparison with State Government Forecasts

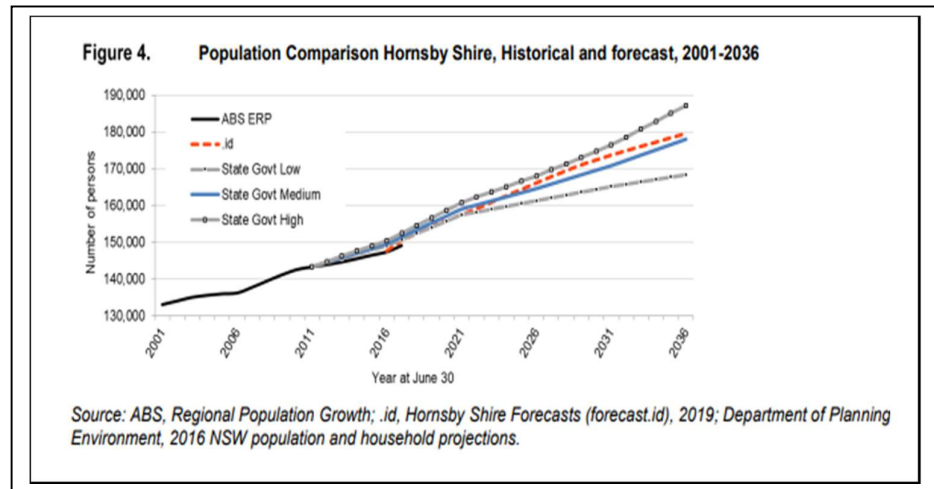
#### Population Growth

The .id forecasts align closely with the NSW State Government medium population growth scenario. The methodologies are slightly different and have therefore led to slightly different results. The figures are slightly higher in the period from 2026 to 2031, but almost converge at 2036. The proportion of +85 age group is

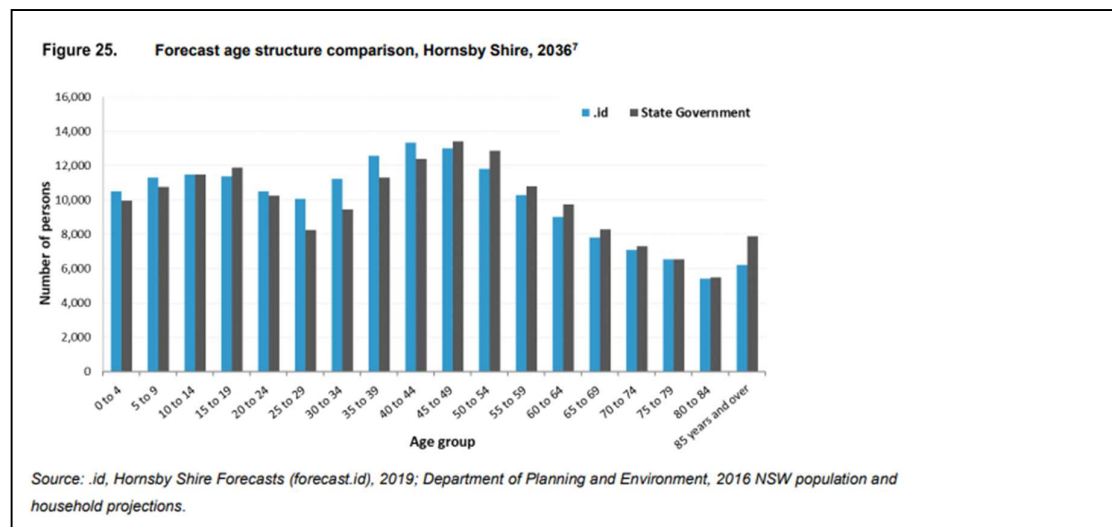


higher in the State Government projections (1,678 persons by 2036) and lower for the 20-24 age group. The .id projections have taken into consideration the Hornsby Town Centre redevelopment opportunities, which is likely to attract a younger age group.

**Figure 4 - Comparison with State Government population projections (.id Report page 4)**



**Figure 5 - Forecast Age Structure Comparison with State Government (.id Report page 35)**



### Implied dwellings

State Government implied dwelling projection to 2036 is 64,950. This is 13,550 implied additional dwellings.

The .id forecast implied dwelling projection to 2036 is 66,631 dwellings, which is an additional 14,879 dwellings.

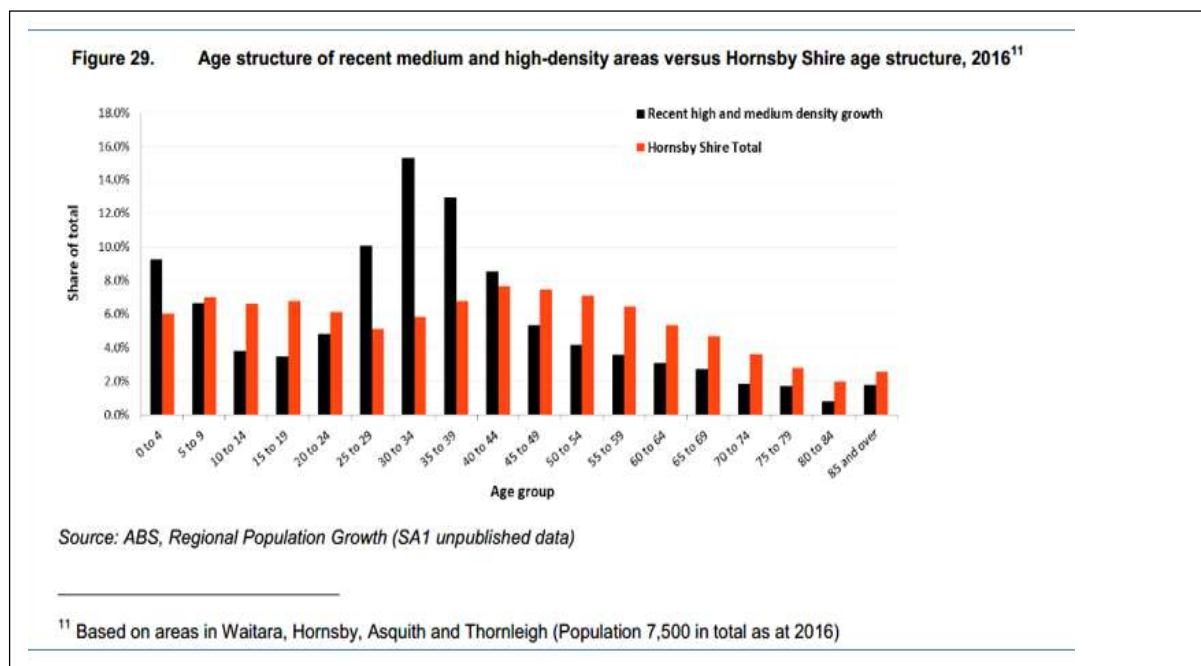


### 1.1.6 Population growth by local area

The spatial pattern of population growth reflects migration patterns and the amount of development around and within the larger centres of the Shire.

The highest rates of growth are forecast for Asquith, Waitara and the Hornsby Town Centre. These areas have a higher share of medium and high-density housing and will tend to gain those in the 20-34 age group and older adults (60-79 years) e.g. Asquith, Mount Colah and Cherrybrook.

**Figure 6 - Age Structure of Recent Medium and High-Density Areas**



Lower rates of growth are forecast for areas such as Beecroft-Cheltenham, Thornleigh and Wahroonga. Only Castle Hill and Dural are expected to decrease in population. These are the areas of the Shire likely to follow a pattern of attracting families and elderly persons, while losing young adults and retirees.

Significant growth is expected in seniors living, which has recently included McQuoin Park aged care facility in Wahroonga.

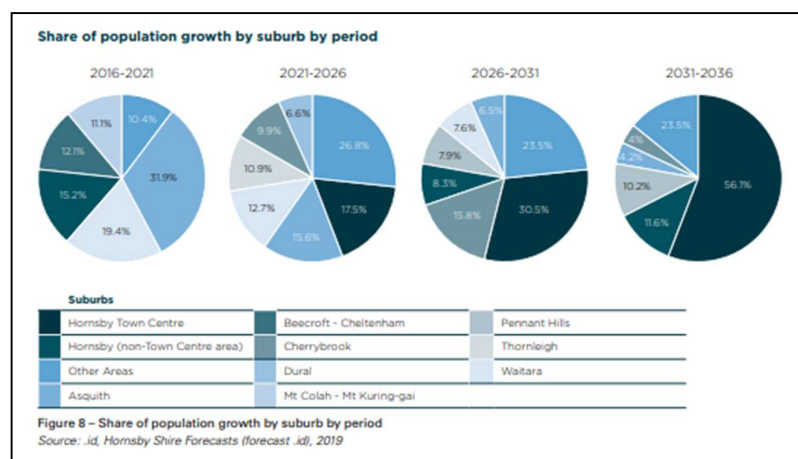


**Figure 7 – Forecast Population Change (Table 7 of id. Report page 23)**

Area	2016	2036	Net change	% change (av. annual)
Hornsby Town Centre	467	7,582	7,115	15.0%
Asquith	3,663	8,898	5,235	4.5%
Waitara	5,900	9,407	3,507	2.4%
Hornsby (non-Town Centre area)	22,555	25,661	3,106	0.6%
Beecroft - Cheltenham	9,147	11,182	2,035	1.0%
Thornleigh	8,737	10,649	1,912	1.0%
Mount Colah - Mount Kuring-gai	9,148	11,011	1,863	0.9%
Pennant Hills	7,567	9,129	1,562	0.9%
Cherrybrook	19,348	20,890	1,542	0.4%
Wahroonga	4,515	5,556	1,041	1.0%
Galston - Middle Dural	3,482	4,326	844	1.1%
West Pennant Hills	4,103	4,815	712	0.8%
Dural	5,658	6,268	610	0.5%
Normanhurst	5,537	6,000	463	0.4%
Berowra	4,906	5,238	332	0.3%
North Epping	4,694	4,857	163	0.2%
Westleigh	4,608	4,745	137	0.1%
Hornsby Heights	6,485	6,562	77	0.1%
Brooklyn	669	691	22	0.2%
Berowra Heights - North Eastern Rural Balance	6,527	6,524	-3	0.0%
Arcadia - North Western Rural	4,031	3,970	-61	-0.1%
Castle Hill	5,913	5,620	-293	-0.3%
<b>Hornsby Shire Total</b>	<b>147,661</b>	<b>179,582</b>	<b>31,921</b>	<b>1.0%</b>

Source: .id, Hornsby Shire Forecasts (forecast.id), 2019

Figure 7 above highlights that in the first 5 years (2016-2021) population growth will be highest in Waitara and Asquith. In the medium to longer term Hornsby Town Centre and surrounds and Cherrybrook will be the focus of population growth.

**Figure 8 - Population growth by area, 2016-2026 (.id Report page 24)**

### Implied dwelling requirement

The State Government's implied dwelling projection of 13,550 is very closely aligned with the id. dwelling projections of 14,879. However, the State Government's projections are based on 2016 population forecasts which are higher across many age groups than the ABS estimate. This difference is carried through to 2036. State Government projections do not reflect the future redevelopment of Hornsby Town Centre which will affect the population profile. The Council's projections prepared by .id are therefore considered more accurate.

Council's dwelling projection of 14,879 represents 16.1% of the North District Plan target of 92,000 dwellings.



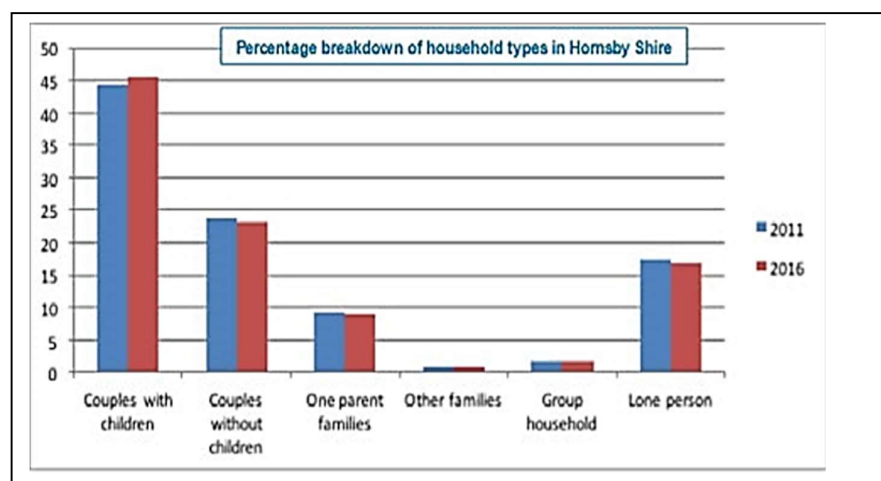
## Households

In 2016 there were 49,864 households in Hornsby Shire, and the average household size was 2.91. The number of households increased by 1,267 between 2011 and 2016.

### The dominant household type is couple families with dependents

Couple families with dependents accounted for 45.3% of all households in 2016, a higher percentage than the Greater Sydney figure of 35.3% for that household type. The 'couples without children' households accounted for 23%, a fall from 24% in 2011. The opposite is true for 'older couples without children' which has grown from 9.7% in 2011 to 10.9% in 2016 of all households. This is particularly pronounced in key suburbs such as Westleigh (17.6%), Glaston Mid Dural (17%) and Beecroft-Cheltenham (15.9%) between 2011 and 2016.

**Figure 9 - Percentage breakdown of household types in Hornsby Shire**

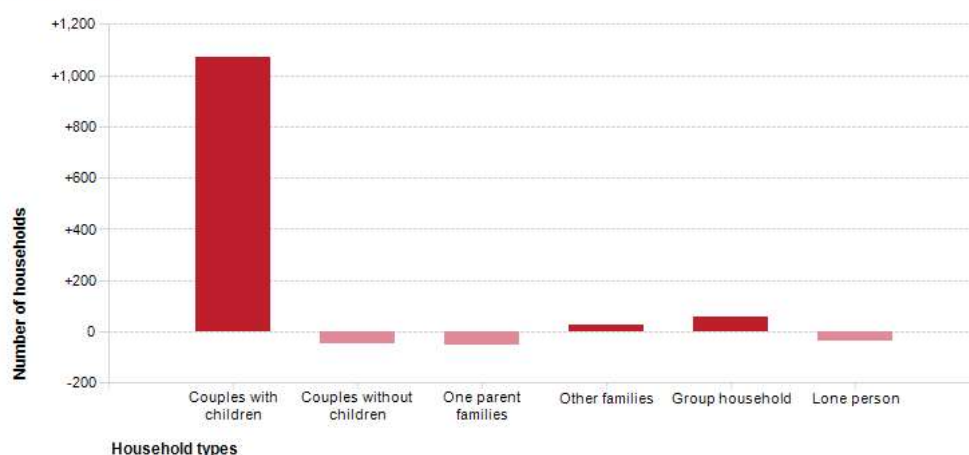


Couples with children has represented the largest change in household type between 2011 and 2016. Areas where there is an existing high concentration of 'couples with children' include Cherrybrook (56%), Berowra (53%) and Beecroft-Cheltenham (52%).

**Figure 10 - Change in Household Type from 2011 - 2016**

### Change in household type, 2011 to 2016

Hornsby Shire



Source: Australian Bureau of Statistics, Census of Population and Housing, 2011 and 2016 (Enumerated data)  
Compiled and presented in profile.id by .id, the population experts.



This is consistent with the increasing number of persons in households. The largest changes in the number of persons usually resident in a household in the Hornsby Shire between 2011 and 2016 were:

- 4 persons (+547 households)
- 3 persons (+284 households)
- 6 or more persons (+243 households)
- 2 persons (-217 households).

### Forecast household types

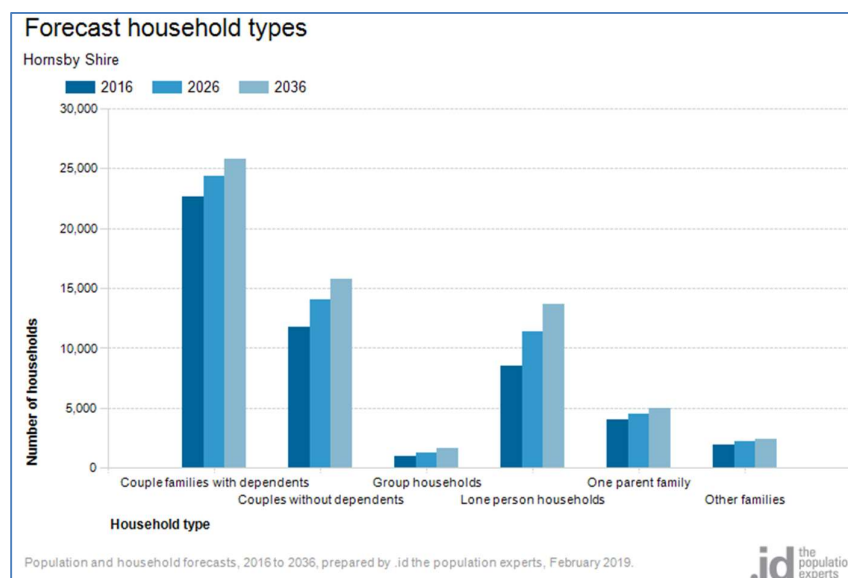
Figure 11 highlights that lone person households are forecast to see the largest increase between 2016 and 2026. This group will increase by 2,835 households and account for 19.7% of all households. By 2036 lone person households will comprise 21.3% of all households.

Couples without dependents will increase by nearly 25% or 3,930 households. Combined with the projected increase in the number of lone person households, we will see the need for an additional 9,000 homes for these smaller household groups.

Couples without dependents will also grow. Areas such as Brooklyn, Westleigh and Beecroft-Cheltenham will have 28-30% of the resident population in this household type. Other areas such as Castle Hill, Berowra and Cherrybrook are expected to experience a larger drop in average household size due to out migration of young adults leaving the family home.

Areas which will see the largest increase in the number of 'couple families with dependents' will be Hornsby Town Centre, Asquith, Waitara and Beecroft-Cheltenham. This reflects new housing development and the transition of areas.

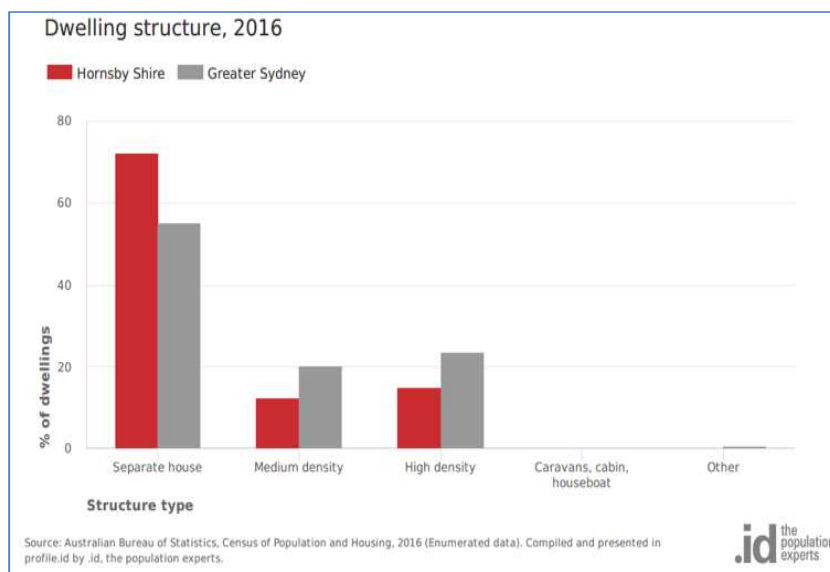
**Figure 11 - Forecast household types**



### Dwelling Structure

**Hornsby Shire has less housing diversity than the Sydney average. In 2016 over 72% of all dwellings were separate houses compared with 55% in Greater Sydney.**



**Figure 12 - Dwelling Structure 2016**

In 2016 Hornsby Shire had the following dwelling structure:

- Separate houses: 37,149 (72.2%) of which over 60% are 3 bedrooms or more
- Medium density dwellings: 6,280 (12.2%) of which more than half are 3 bedrooms or more
- High density dwellings: 7,607 (14.8%) of which a fifth are 1-bedroom units and two-thirds are 2-bedroom

The high proportion of detached dwellings is not surprising given the distance from the CBD and the Shire's stock of traditionally family orientated housing. Progressive piecemeal development of units, townhouses and secondary development in the suburbs has occurred. Overall however there is a discernible lack of smaller, more affordable types of housing.

#### *Variation by suburb*

The proportion of separate houses ranged from a low of 10.4% in Waitara to a high of 98.2% in Arcadia - North Western Rural.

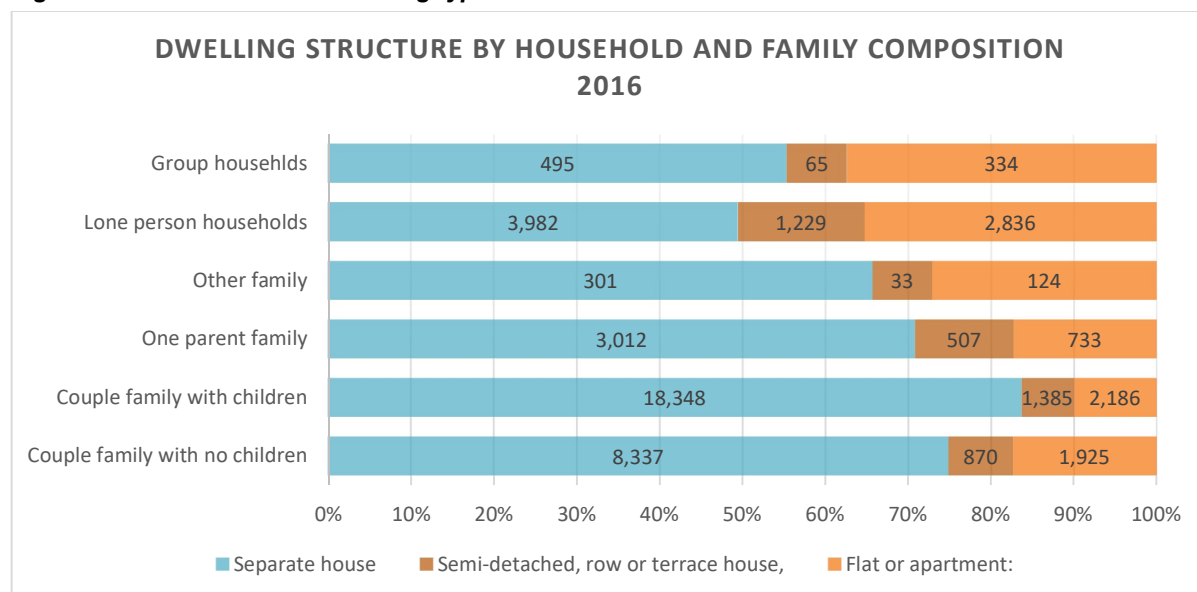
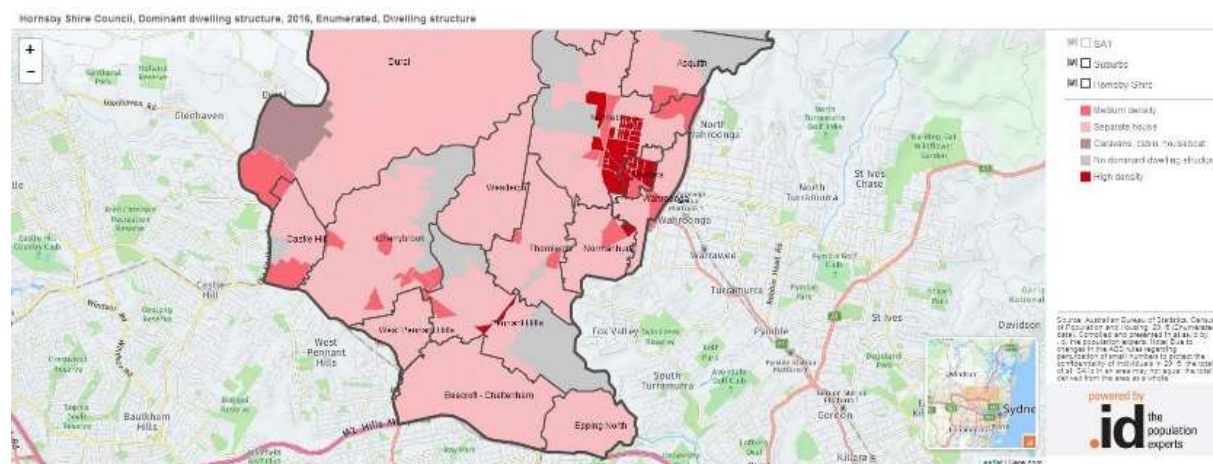
The proportion of medium density ranged from a low of 0.5% in Arcadia - North Western Rural to a high of 28.9% in Castle Hill.

Waitara had the highest proportion of high-density dwellings (75.2%), followed by Hornsby (51.6%). Figure 13 below illustrates the dominant house structure by suburb.

#### **Dwelling Structure by Household Composition**

Existing dwelling structure is predominantly separate houses. The following chart highlights that separate dwellings are the dominant type of dwelling for all household types in 2016 – including 49% of lone person households. Over 83% of couple family with children live in a separate house as well as nearly 75% of couple family with no children.



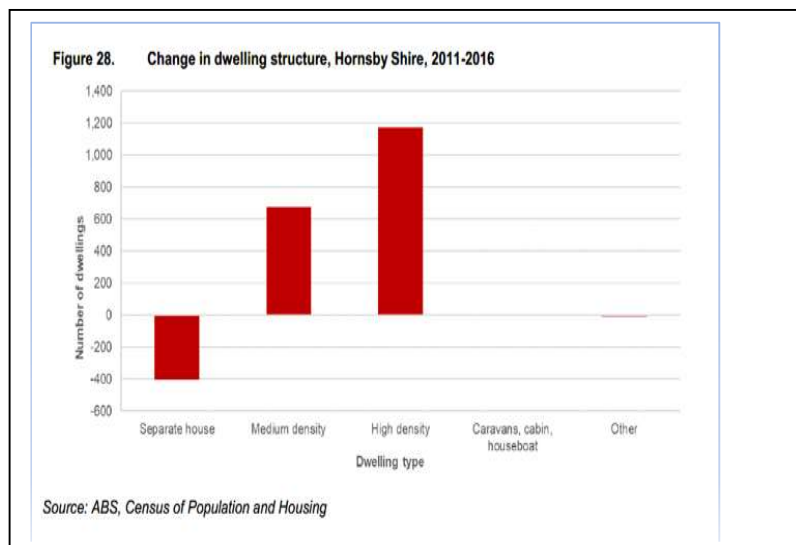
**Figure 13 Households and dwelling types****Figure 14 - Concentration of Medium & High-Density Dwellings in Hornsby Shire**

**The most significant changes in dwelling structure between 2011 and 2016 was the increase in high density.**

This trend reflects the implementation of the Council's 2011 Housing Strategy which rezoned land for medium and high-density dwellings. The main changes (2011 to 2016) are illustrated in Figure 15 which shows the following changes:

- High density (+1,176 dwellings)
- Medium density (+676 dwellings)
- Separate house (-404 dwellings)



**Figure 15 - Change in Dwelling Structure, 2011-2016**

**The dwelling stock in Hornsby Shire is likely to remain predominantly detached separate houses well beyond 2036.**

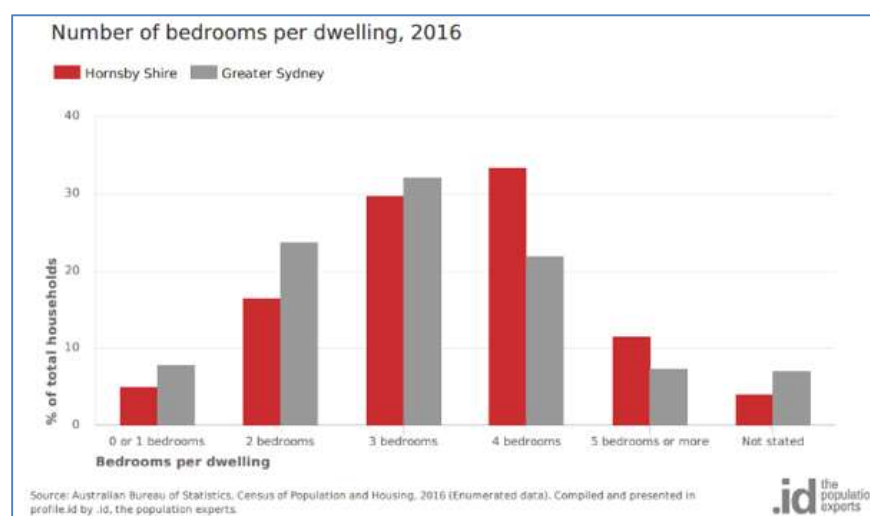
Even with current zoning and likely future increases in high density dwellings in the Hornsby Town Centre and Cherrybrook, the Shire's housing stock will remain predominantly separate houses.

### Number of Bedrooms

**Dwellings are generally larger in Hornsby Shire than Greater Sydney.**

Hornsby Shire has a higher proportion of dwellings with 4 or more bedrooms and a lower proportion of dwellings with 2 bedrooms or less than Greater Sydney in 2016. Figure 16 below.

- 4 bedrooms or more – Hornsby Shire 44.9% compared with 29.3% Greater Sydney
- 2 bedrooms or less – Hornsby Shire 21.4% compared with 31.5% and for Greater Sydney

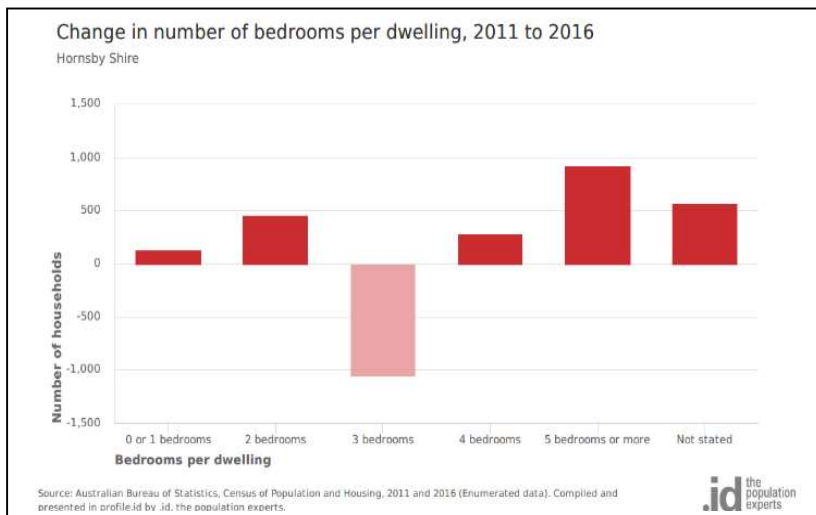
**Figure 16 - Number of bedrooms per dwelling, 2016**

Between 2011 and 2016 there has been a significant increase in 4 and 5+ bedroom properties and a loss of mainly 3-bedroom properties, which contrasts with the Greater Sydney trends.



- 3 bedrooms (-1,048 dwellings)
- 5 bedrooms or more (+924 dwellings)
- 2 bedrooms (+451 dwellings)
- 4 bedrooms (+280 dwellings)

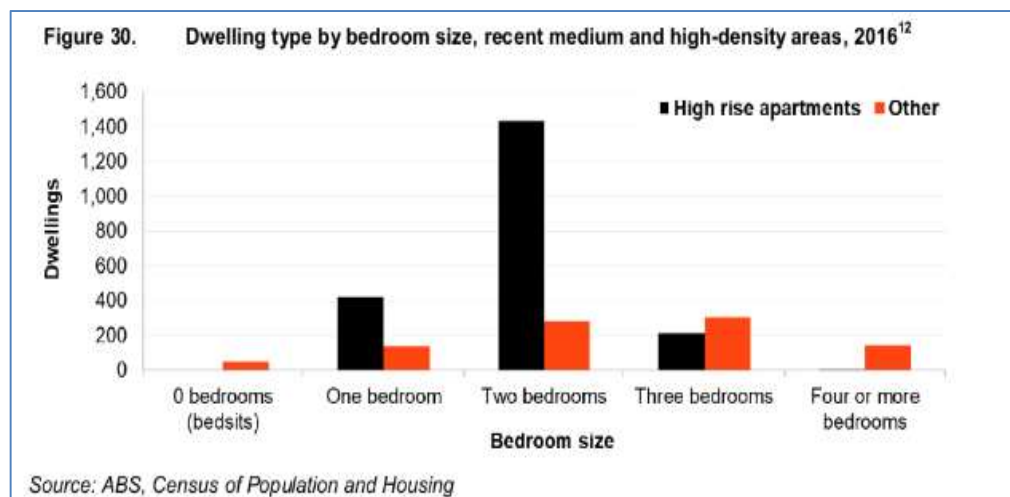
**Figure 17 - Change in number of bedrooms per dwelling, 2011 to 2016**



### Newer apartments offer a predominantly 2-bedroom product

There has been a concentration of two-bedroom dwellings in recent medium and high-density areas. The share of one-bedroom and three-bedroom apartments has been lower than expected. Figure 18 below.

**Figure 18 - Dwelling Type by Bedroom Size, Recent & High-Density Areas**



### Tenure and Landlord Type

**In 2016 over 73% of households in Hornsby Shire were purchasing or fully owned their home.**

Hornsby Shire has a higher proportion of home ownership than Greater Sydney and significantly lower rates of private renting. Figure 19 below illustrates key information on households:

- 34.6% fully owned their home (27.7% in Greater Sydney)



- 38.5% had a mortgage (31.5% Greater Sydney)
- 18.3% rented privately (27.6% in Greater Sydney)
- Only 2.2% were in social housing (4.6% in Greater Sydney).

**Figure 19 - Housing Tenure, 2016**

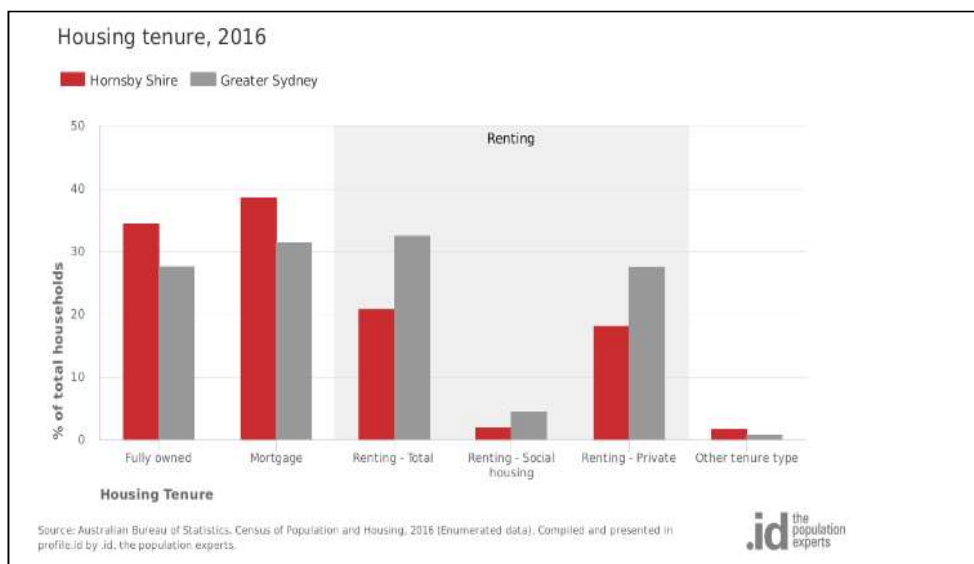


Figure 20 below shows the dominant housing tenure by suburb on a map. It highlights that 'fully owned' is the dominant tenure in many suburbs including Beecroft-Cheltenham. In Hornsby and Waitara the dominant tenure tends to be private rented. Those areas with the highest social renting tenure include Castle Hill (7.0%), Normanhurst (6.5%) and Hornsby (4.2%).

**Figure 20 - Map of housing tenure 2016**



**Trends outline that home ownership is in decline and more people are retiring with a mortgage or living long term in private rental.**

Between 2011 and 2016 there was a decline in the number of households owning their home. This coincided with the rise in private renting (+885 households). This would suggest that the stock of private rental housing is increasing.

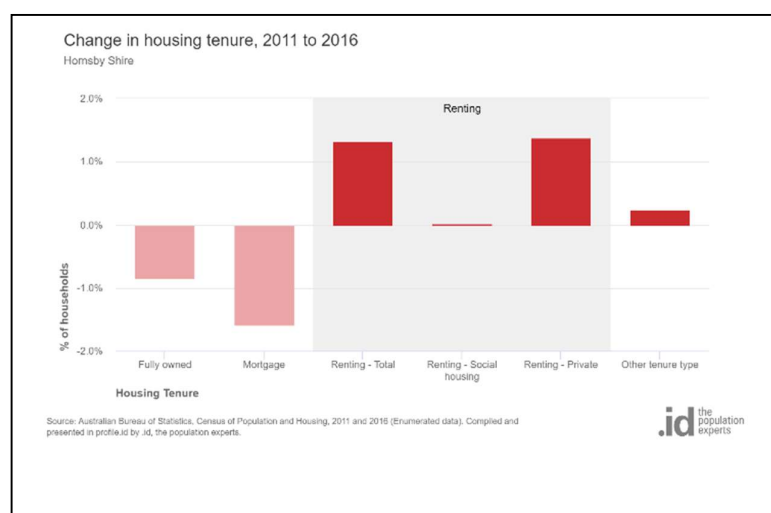
Some of the fall in ownership may be attributed to the loss of retirees selling the principal home to provide additional income.



Despite the number of new apartments being built from 2011 to 2016, the proportion of rental housing in Hornsby Shire only increased by 1.4%. This indicates a shortage of supply in rental accommodation in Hornsby

**Hornsby has a higher % of households renting compared with The Hills Shire and Ku-ring-gai but has seen the lowest growth rate since 2006**

**Figure 21 - Change in housing tenure, 2011 to 2016**



Comparison with adjacent local government areas highlights that in 2016 Hornsby Shire had a similar percentage of homes fully owned (34.6%) when compared with The Hills (33.8%). This was considerably lower than Ku-ring-gai Council (41%). Ku-ring-gai has experienced a more significant drop of fully owned tenure households, -8% since 2011 compared with -1.4% in Hornsby Shire and -0.2% for The Hills Shire.

In 2016 the Shire had the highest percentage of households renting (20.8%) compared with Ku-ring-gai (17%) and The Hills (16.9%). Ku-ring-gai's rental sector saw the most significant growth between 2006 and 2016 (+5%) compared with The Hills (2.2%) and Hornsby Shire (0.7%).

Between 2006 and 2016 households with a mortgage increased by 3% (34-37%) in Ku-ring-gai, increased 0.4% in Hornsby Shire and fell 2.4% (47.1% to 44.7%) in The Hills Shire.

The dominant household type for all three LGAs is couple families with dependents.

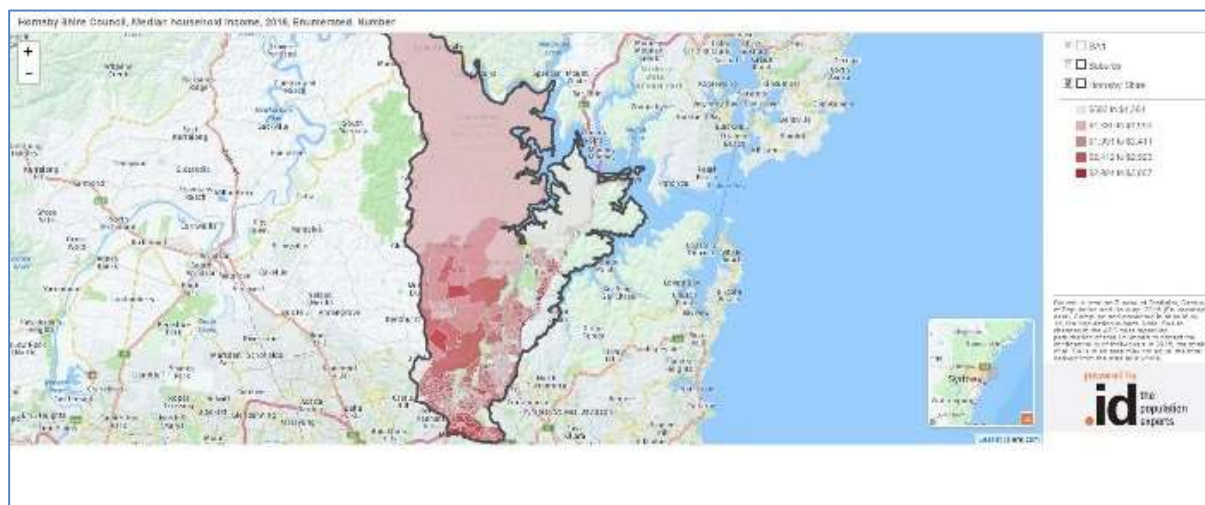
## Household Income

### Median income

In 2016 the median (mid-point) household income for the Shire was \$2,116 per week which was \$371 more than Greater Sydney, but lower than Ku-ring-gai (\$2,633) and The Hills (\$2,464).

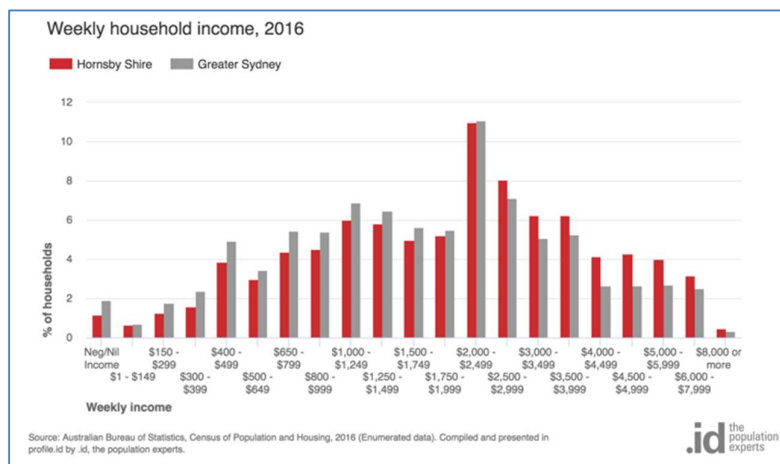
Within the Shire, median household incomes range from a low of \$1,700 in Hornsby to a high of \$2,932 in Beecroft - Cheltenham. 50% of the households in Beecroft-Cheltenham earn over \$2,500 per week. Figure 22 highlights the concentration of higher median incomes in the southern areas of the shire, illustrated by the darker colour.



**Figure 22 - Median household income by area, 2016****Income range**

In 2016, 36.6% of households in Hornsby were high income households, receiving a weekly income of \$2,500 or more. This is higher than the Greater Sydney average. Only 11.5% of households were in the low-income bracket (those earning less than \$650 per week) compared with 15.1% for Greater Sydney.

Castle Hill followed by Waitara had the highest proportion of low-income households in the Hornsby Shire.

**Figure 23 - Weekly household income, 2016**



## Rental and Mortgage Stress

Lower income households who are paying more than 30% of their household income to meet their housing costs are generally considered to be in housing stress

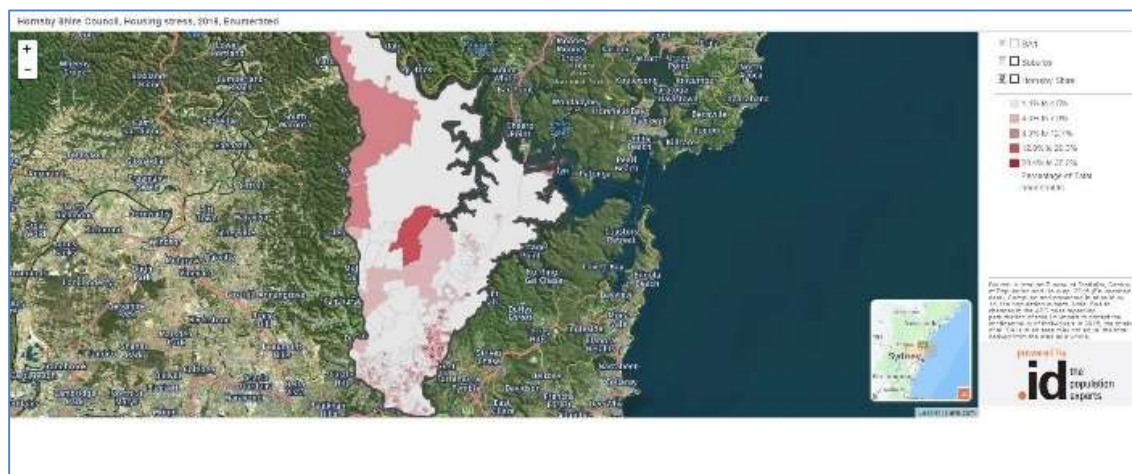
- Very Low Incomes is below 50% of the Census Median Equivalised Income.
- Low Incomes is 50% - 80% of the Census Median Equivalised Income.
- Moderate Incomes is 80% - 120% of the Census Median Equivalised Income.

**7.4% of the Hornsby Shire's households, were experiencing housing stress compared to 11.8% in Greater Sydney (2016).**

The areas with the highest percentages of housing stress were Hornsby (14.2%), Waitara (12.8%) and Wahroonga (8.0%). **The darker areas shown on Figure 24 denote the higher levels of housing stress.**

- Galston-Middle Dural had the highest proportion of people experiencing mortgage/ home purchase stress
- Hornsby had the highest proportion of people experiencing rental stress

**Figure 24 - Housing stress by area**

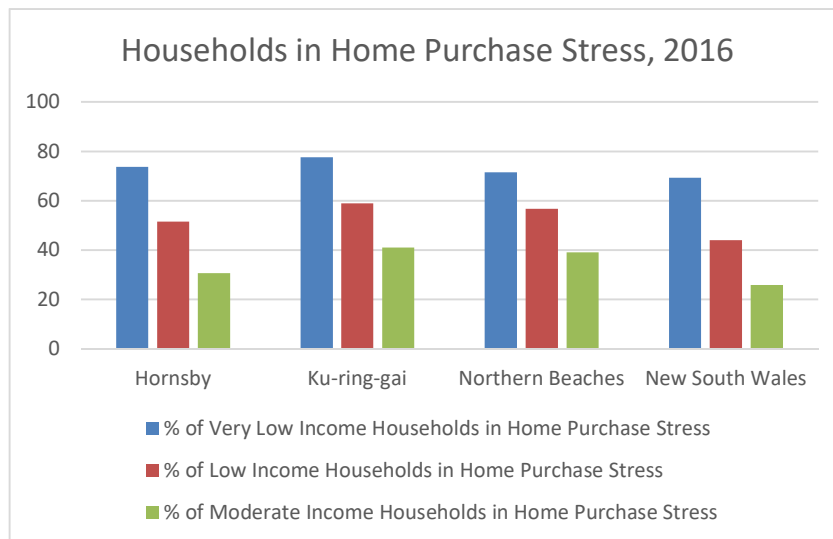


*Hornsby Affordable Housing Discussion Paper, 2018*

The 2016 Hornsby Shire census data shows that 40% of households with mortgages and very low-income, low and moderate incomes were in home purchase stress. This represents a 15% decline from 2011. This is generally in line with the NSW figure.

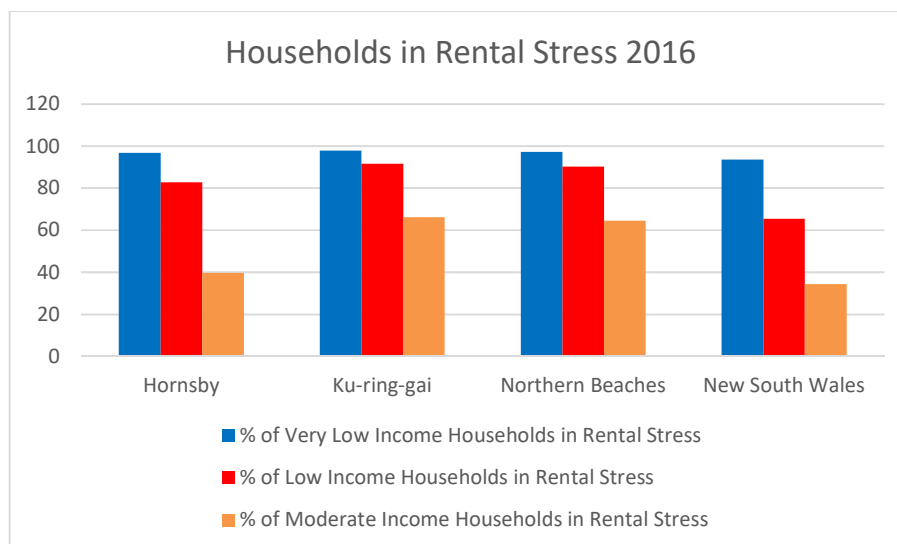
- 74% of very low-income households were in purchase stress
- 52% of low income households were in purchase stress
- 31% of moderate income households were in purchase stress



**Figure 25 - Percentage of households in home purchase stress, 2016**

The 2016 Hornsby Shire census data shows that 67% of households renting and with very low-income, low and moderate incomes were in rental stress. This represents a 2% decline from 2011. This is marginally better than adjacent council areas but lower than NSW at 64.4%.

- 97% of very low-income households were in rental stress
- 83% of low income households were in rental stress
- 40% of moderate income households were in rental stress

**Figure 26 - Percentage of households in rental stress, 2016**

FACS calculates that purchase affordability for very low-income households in the North District has been close to 0% in most local government areas for the last 12 years. In Hornsby this was 1% in June 2017. For low income households purchase affordability in Hornsby is only marginally better at 1.3%. Affordability for moderate income households to purchase in Hornsby is 4.8%, well below the average for NSW of 29.3% at June 2017. [Note the Greater Sydney number unavailable]



## Employment and Local Workers

In June 2018 there were an estimated **50,943 local jobs** in Hornsby Shire. This represents a 1.8% increase in jobs from 2017. The growth has been almost exclusively related to household services reflecting strong population and household growth.

The three largest industries (based on jobs held by full-time equivalent local workers) in 2017/18 were:

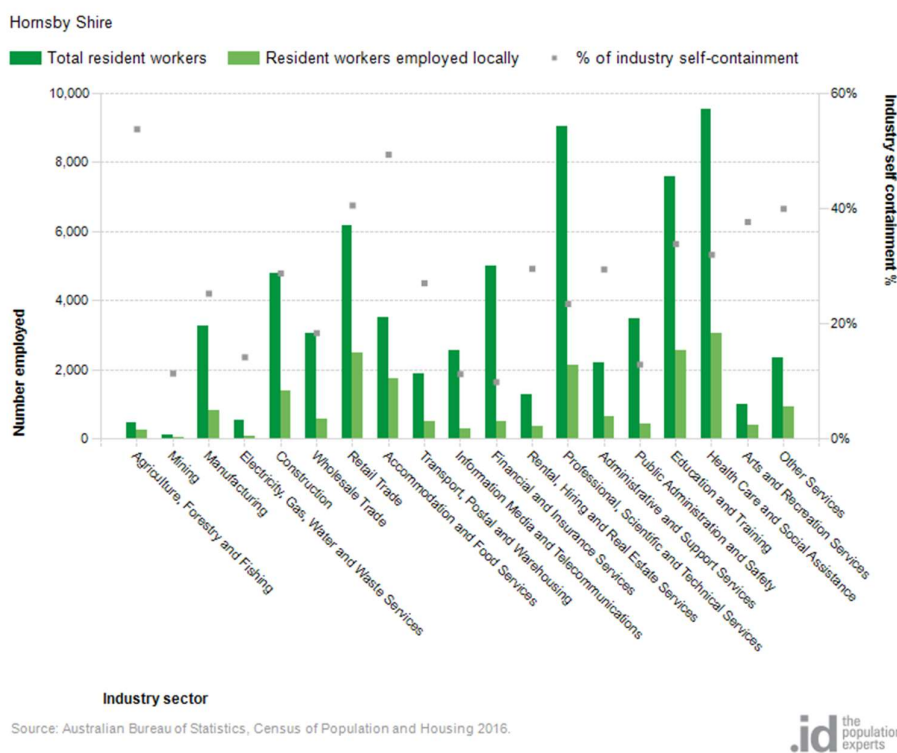
- Health care and social assistance (6,265 full-time equivalent workers or 16.2%)
- Education and training (4,959 full-time equivalent local workers or 12.8%)
- Retail trade (4,508 full-time equivalent local workers or 11.6%).

Journey to work data shows that Hornsby Shire residents took around 48% of local jobs.<sup>2</sup> Over half of the local workforce (52%) lived outside the Hornsby with around 10% travelling from the Central Coast (around 4,100 people) and a further 10% from the Hills Shire. This reflects the excellent transport options available to people outside the Shire.

Figure 27 shows high self-containment for those residents with jobs in accommodation and food (49%) and retail trade (40%). Low self-containment is noted in financial and insurance services (10%), Information, Media and Telecommunications (11.3%) and Public Administration and Safety (13%).

**Figure 27 - Employment Self Containment by industry, 2016**

Employment self-containment by industry 2016



### Shire residents in employment

Labour force participation in 2016 was 64.8%, with 74,371 residents over the age of 15 employed. However, only 28% of residents lived and worked in the Shire.

Approximately 72% of the Shire's residents travelled outside of the local government area to work. Nearly 18% of residents travelled to the City of Sydney and 33% travelled to other local government areas in the North District. There is a disparity between the skills and education of the residents, compared to jobs available in Hornsby Shire. Figure 28 below demonstrates the major differences in industry types between local jobs

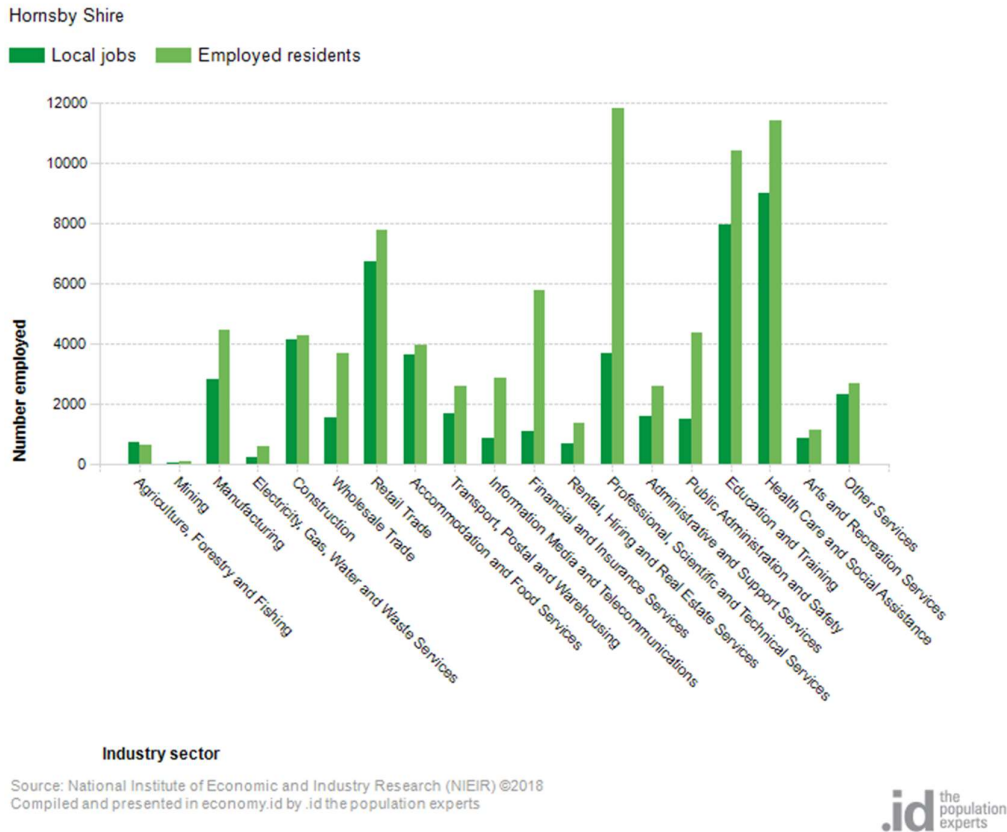
<sup>2</sup> 48% is based on evidence from the 2016 census and does not necessarily reflect the NIEIR data



and workers, particularly in the Professional, Scientific and technical Services and the Financial and Insurance Services.

**Figure 28 - Resident workers and local employment**

### Employment capacity by industry 2017/18



#### Key workers

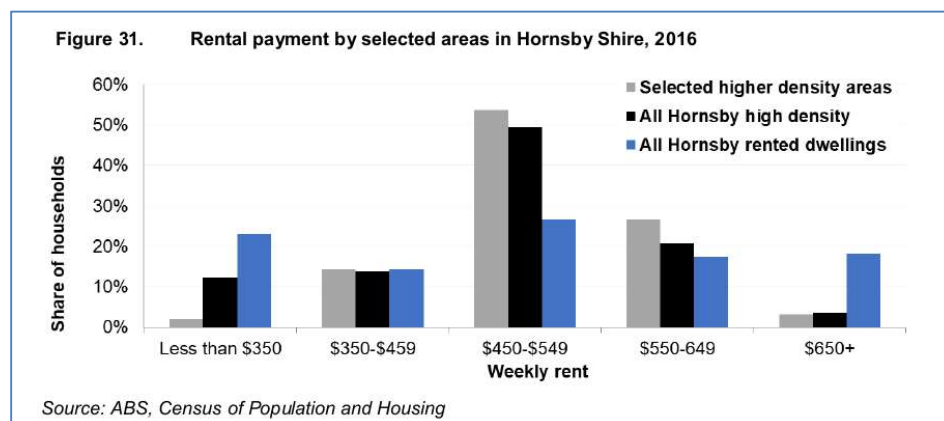
Key workers provide essential services and are vital to the area's safety, vitality, sustainability and social diversity. They include teachers, nurses, police, ambulance officers, fire and emergency workers. They are typically paid low to moderate incomes. They are often constrained by where they can afford to live.

A recent study by the University of Sydney found that in Hornsby Shire in 2011, the median house price was 9.5 times the earnings of a key worker and by 2018, it had grown to 16 times the earnings of a key worker. Hornsby Shire had a net loss of 1.8% of the key worker population in the 10 years between 2006 and 2016.

Hornsby will need a range of housing options that keep key workers in the Shire, provide access to housing options for people on low and moderate incomes and provide additional housing choice and affordability for first home buyers.



**Figure 29 - Rental payment by selected areas in Hornsby Shire, 2016**











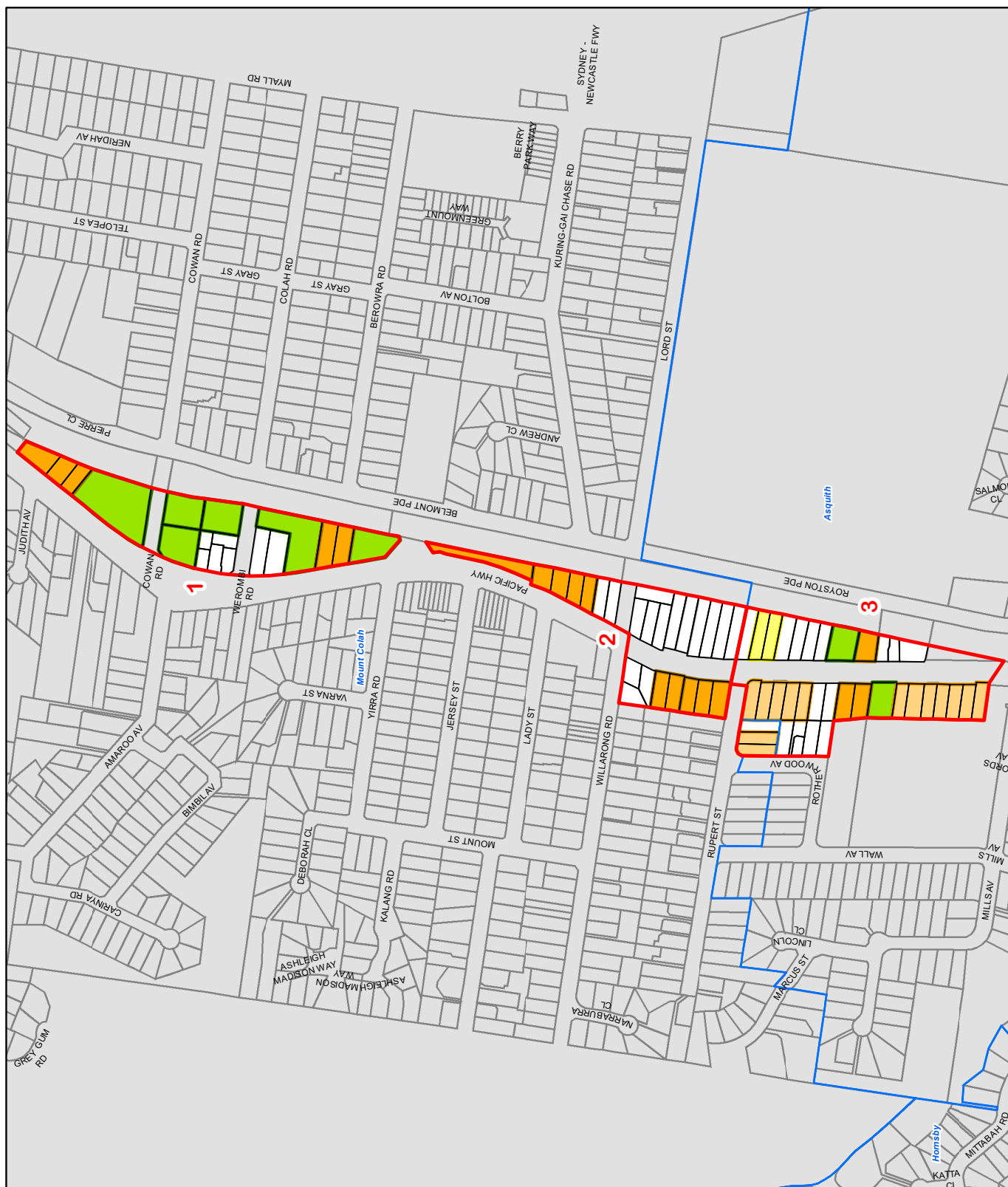
YOUR VISION.  
YOUR FUTURE.

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# Housing Strategy Appendix 2

Housing Precinct  
Development  
Status Maps



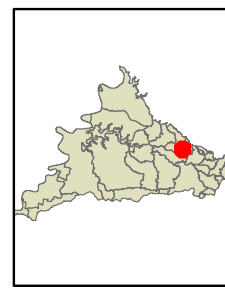
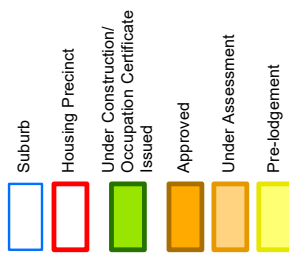


## Housing Precincts Development Status

Disclaimer: Map displays status of applications as of January, 2020.

### Precinct:

- 1) Pacific Hwy, Mount Colah
- 2) Pacific Hwy, Mount Colah
- 3) Pacific Hwy, Mount Colah



N

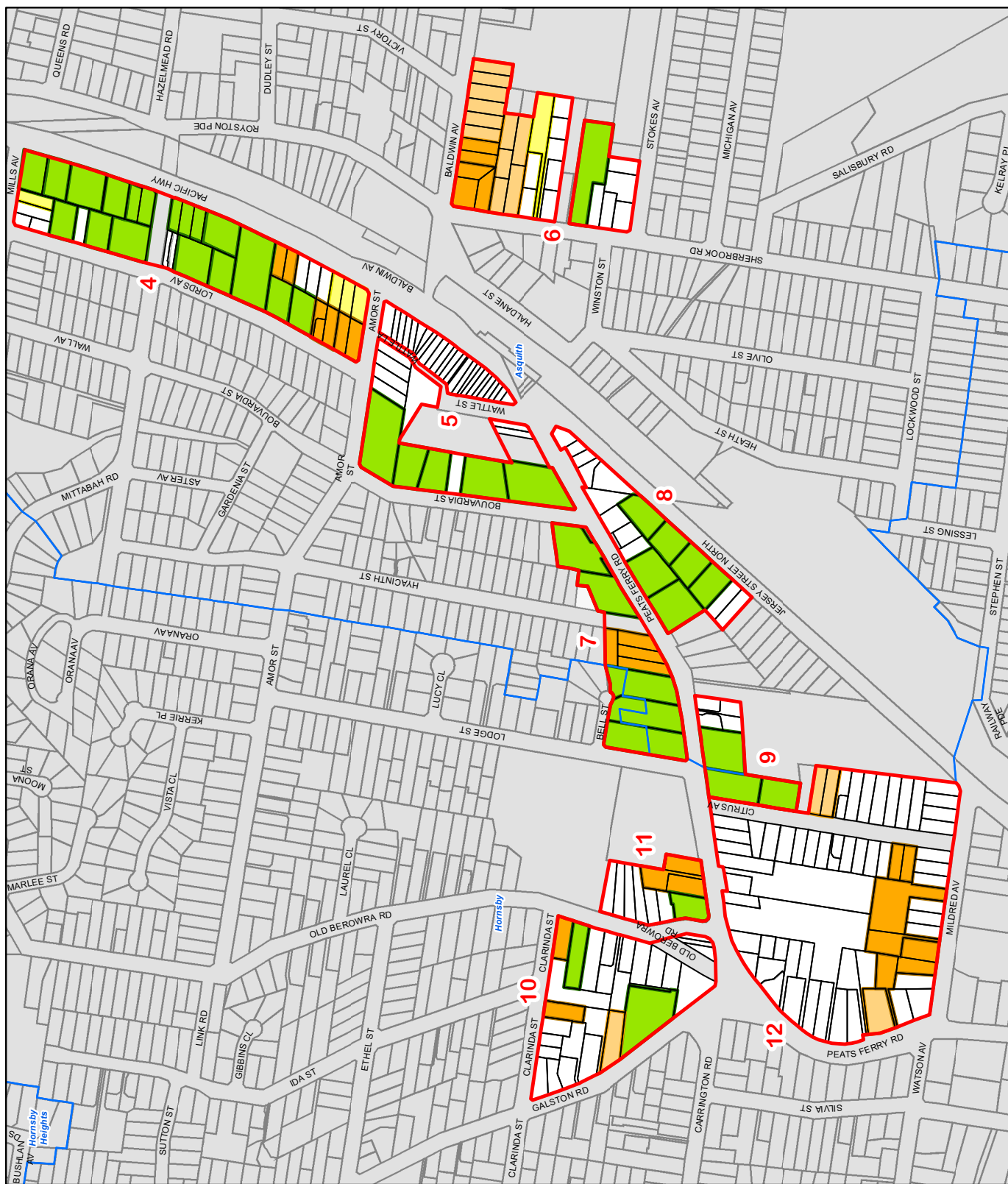
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MGA Zone 56

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Scale: 1:5,500

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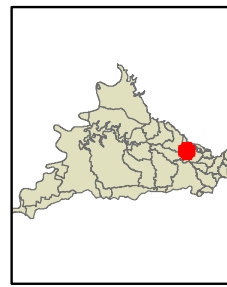
## Housing Precincts Development Status

Disclaimer: Map displays status of applications as of January, 2020.

## Precinct:

- 4) Lords Ave, Asquith
- 5) Commercial Centre & Bouvardia St, Asquith
- 6) Baldwin Ave & Stokes Ave, Asquith
- 7) Hyacinth St, Asquith
- 8) Jersey St North, Asquith
- 9) Peats Ferry Rd, Asquith
- 10) Galston Rd, Hornsby
- 11) Old Berowra Rd, Hornsby
- 12) Mildred Ave, Hornsby

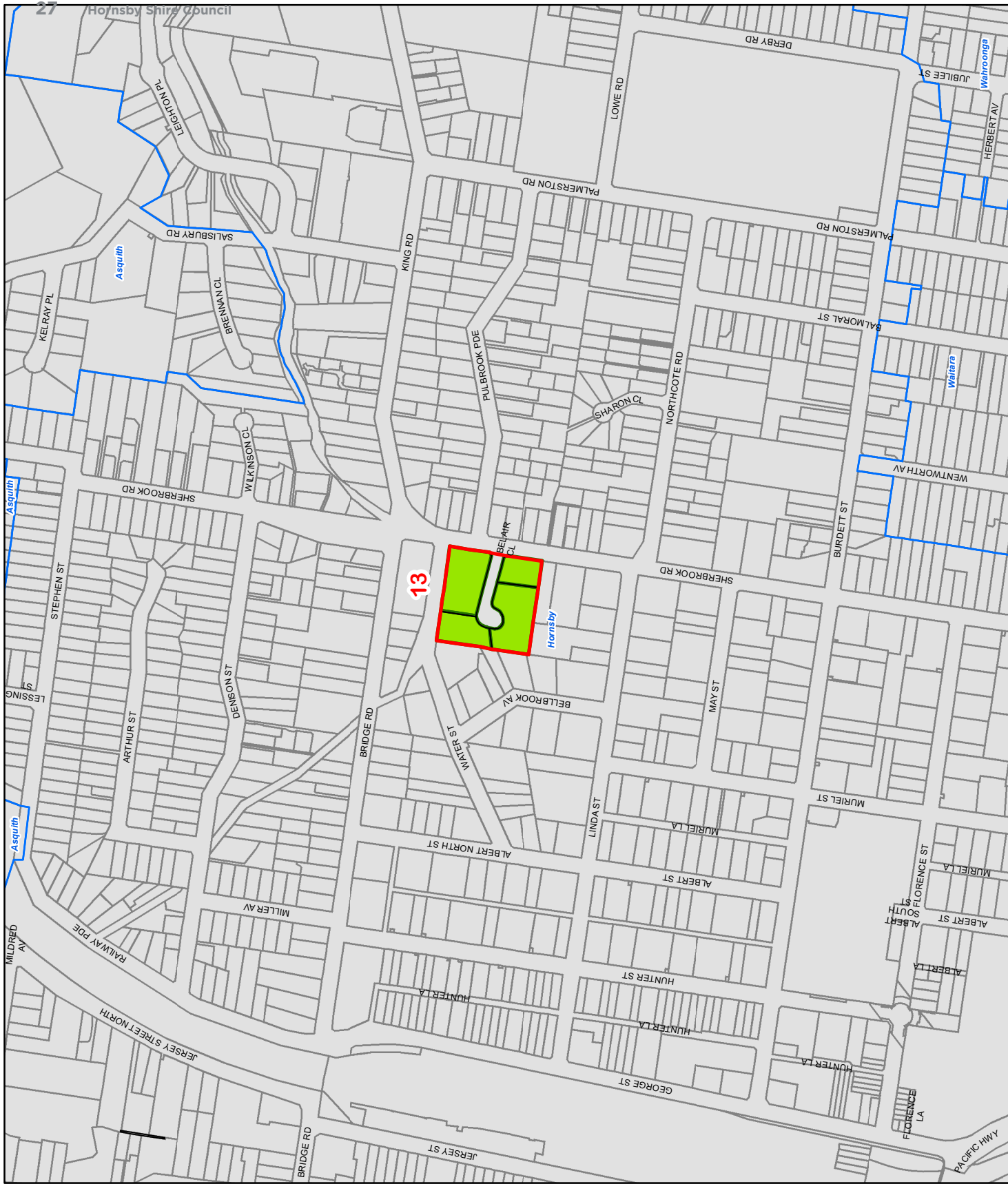
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Projection: GDA 1994  
MGA Zone 56  
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Date: 23/01/2020 Page 2 of 8





# Housing Precincts Development Status

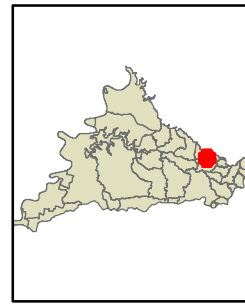


Disclaimer: Map displays status of applications as of January, 2020.

## Precinct:

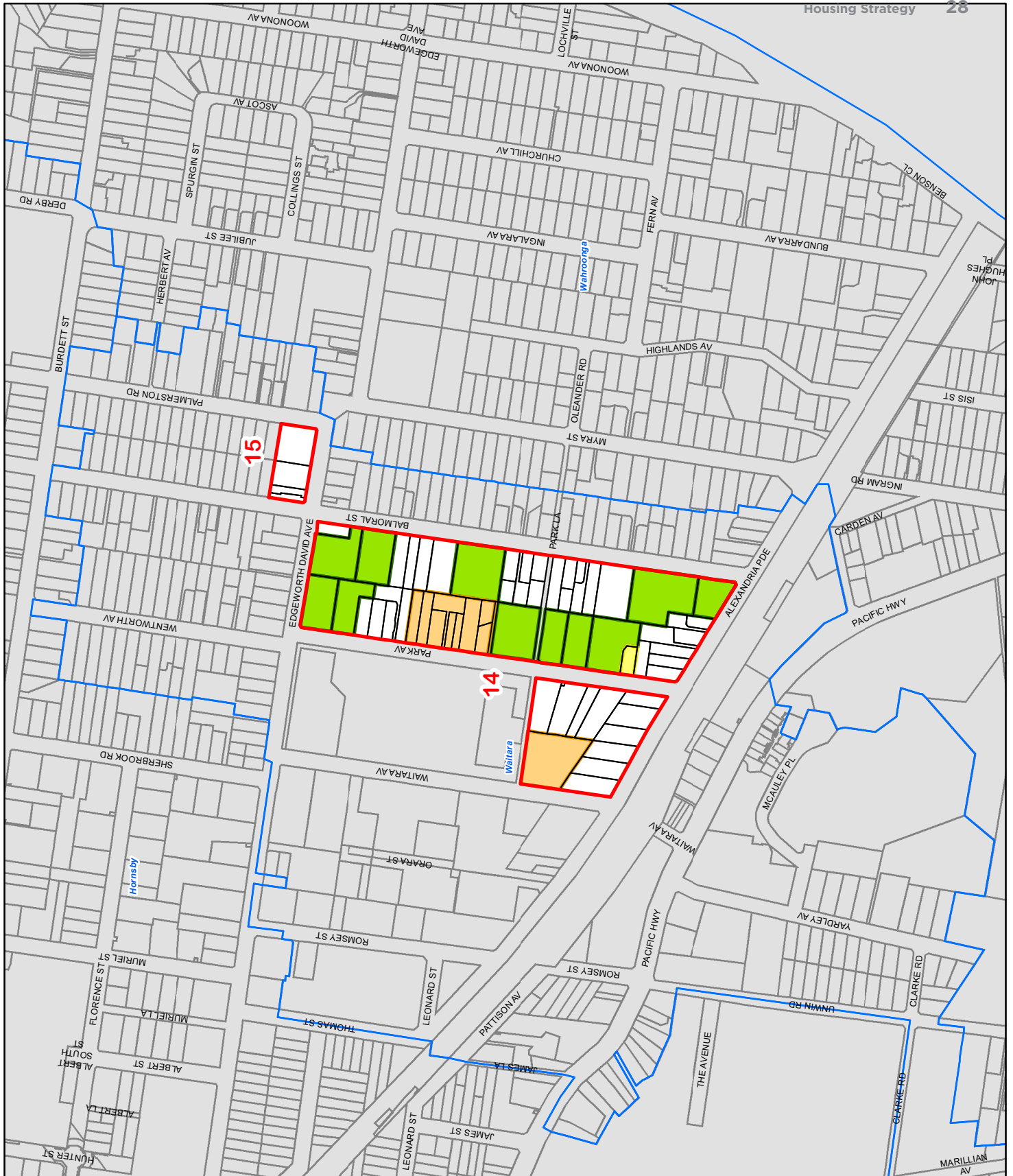
13) Belair Cl, Hornsby

- Suburb
- Housing Precinct
- Under Construction/  
Occupation Certificate  
Issued
- Approved
- Under Assessment
- Pre-lodgement



Projection: GDA 1984  
MGA Zone 56  
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Date: 23/01/2020  
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## Housing Precincts Development Status

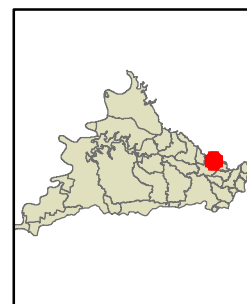
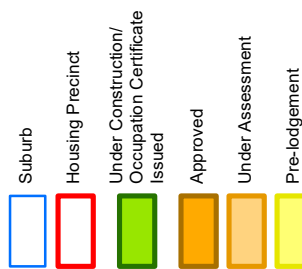


Disclaimer: Map displays status of applications as of January, 2020.

### Precinct:

14) Park Ave & Balmoral St, Waitara

15) Palmerston Rd Commercial Centre, Waitara



Projection: GDA 1994  
MGA Zone 56

Scale: 1:6,500

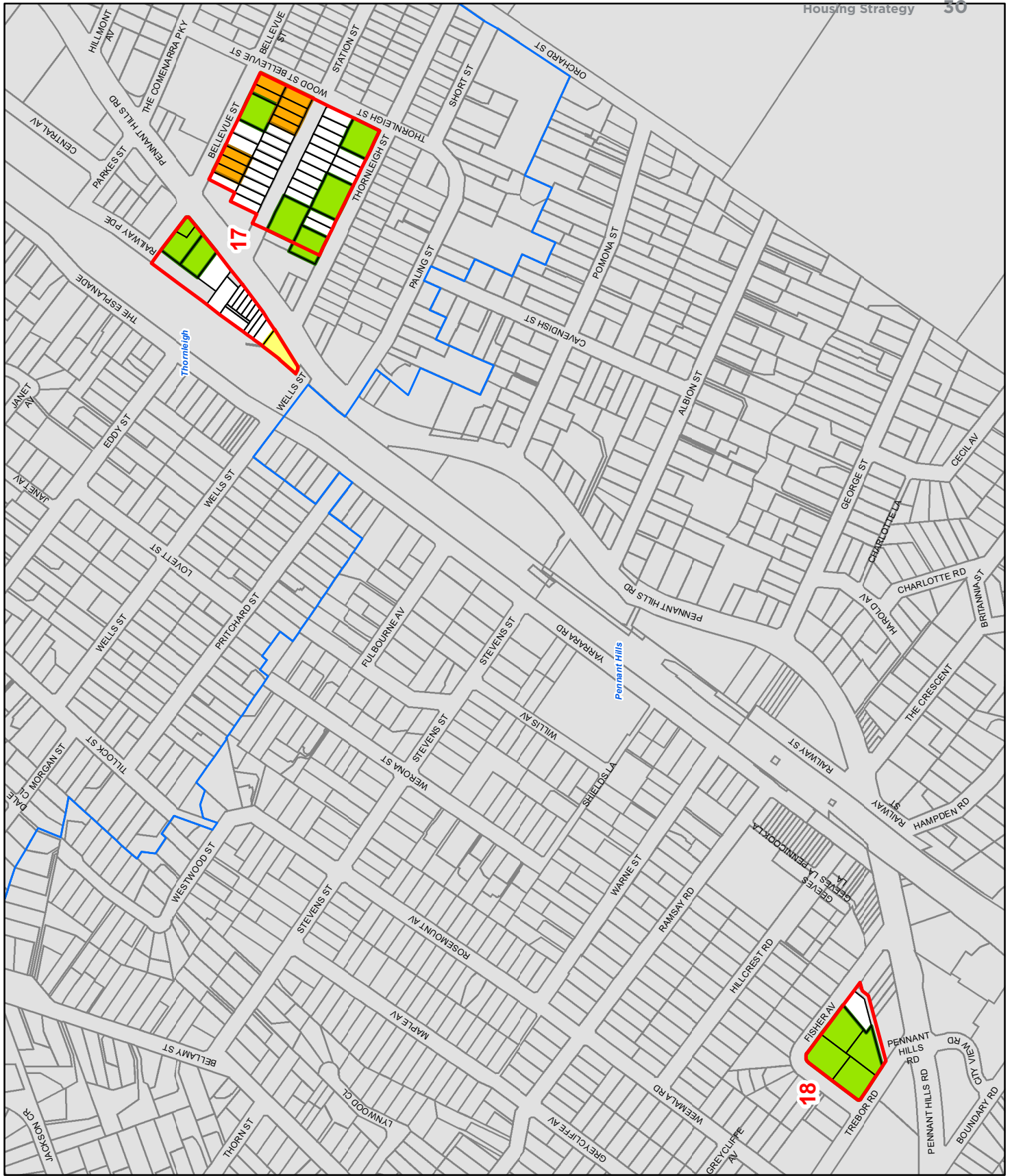
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## Housing Precincts Development Status

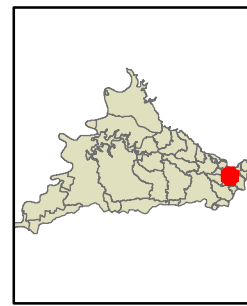
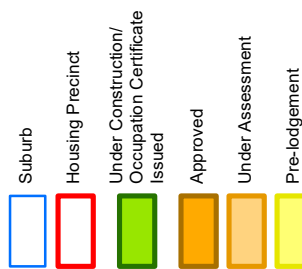


Disclaimer: Map displays status of applications as of January, 2020.

### Precinct:

17) Pennant Hills Rd Commercial Centre & Station St, Thornleigh

18) Fisher Ave, Pennant Hills



Projection: GDA 1984 MGA Zone 56

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# Housing Precincts Development Status

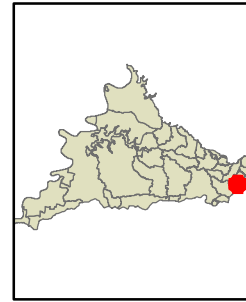


Disclaimer: Map displays status of applications as of January, 2020.

## Precinct:

19) Thompsons Corner  
Commercial Centre, West  
Pennant Hills

- Suburb
- Housing Precinct
- Under Construction/  
Occupation Certificate  
Issued
- Approved
- Under Assessment
- Pre-lodgement



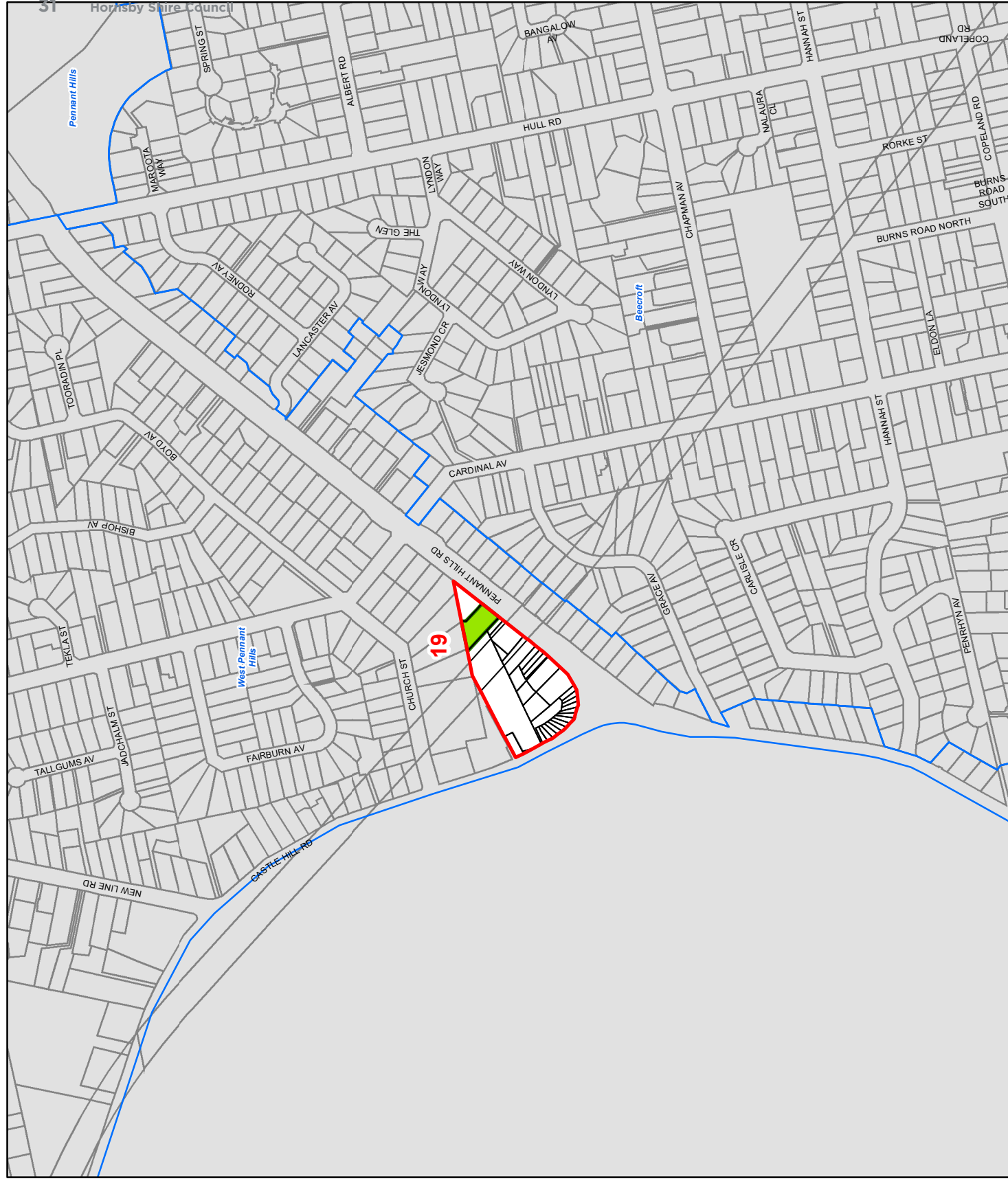
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Date: 23/01/2020 Page 7 of 8





# Housing Precincts Development Status

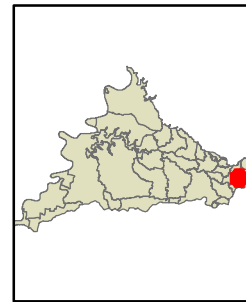


Disclaimer: Map displays status of applications as of January, 2020.

## Precinct:

20 Beecroft Rd, Beecroft

- Suburb
- Housing Precinct
- Under Construction/ Occupation Certificate Issued
- Approved
- Under Assessment
- Pre-lodgement



Projection: GDA 1994 MGA Zone 56

Scale: 1:6,500

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