



Hornsby Shire

Population Projections Report, 2016-2036

Endorsed by Council
10 April 2019



prepared by .id

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Executive Summary

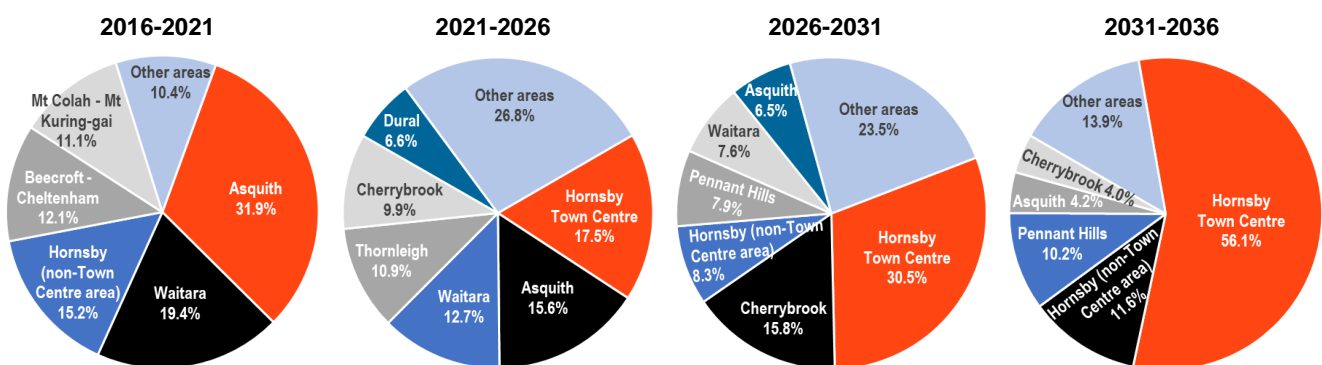
Background and introduction

- ▣ .id the Population Experts (.id) was engaged by Hornsby Shire Council (Council) to provide population and household forecasts to 2036.
- ▣ The forecasts provide the demographic and spatial context for change in the Shire, as well as underpinning Council’s planning direction and informing the long-term direction of Council’s service deliveries.
- ▣ The forecasts are based on minimal changes to the current planning framework in Hornsby Shire. Assumptions have been made regarding the upcoming Hornsby Town Centre Review and the development of Government land only at Cherrybrook Station, in relation to the provision of long-term housing targets.
- ▣ The combined total of these new residential opportunities and existing zoned land would satisfy Council’s obligations to provide enough new dwelling opportunities outlined in the ‘Our Greater Sydney 2056 - North District Plan, 2018 (North District Plan) to 2036.

Total population

- ▣ The population of Hornsby Shire is forecast to increase by 1% per annum from 147,661 people in 2016 to 179,582 in 2036.
- ▣ Growth is expected to be highest between 2016 and 2021, then decrease as development rates fall.
- ▣ Average household size is forecast to decline from 2.91 to 2.75 persons per household from 2016 to 2036.
- ▣ Population growth is driven predominantly by growth in dwelling stock. The main areas of growth in the short-term are Asquith, Waitara and Hornsby (non-Town Centre area). By 2031, population growth is expected to focus in the Hornsby Town Centre. See Figure 1 below.

Figure 1. Share of population growth by suburb by period¹



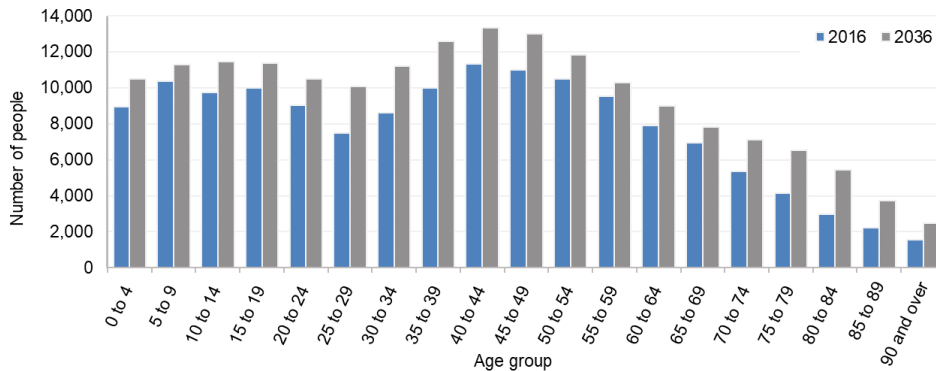
Source: .id, Hornsby Shire Forecasts (forecast.id), 2019

¹ Other areas refer to the remaining areas in the Shire. Some of these areas may be decreasing in population. For detailed maps of all areas in Hornsby Shire, refer Appendix 1.

Age structure

- Net population increases are expected in all age groups from 2016 to 2036 in line with the increased diversity of dwelling stock. See Figure 2 below.

Figure 2. Age structure, Hornsby Shire 2016-2036



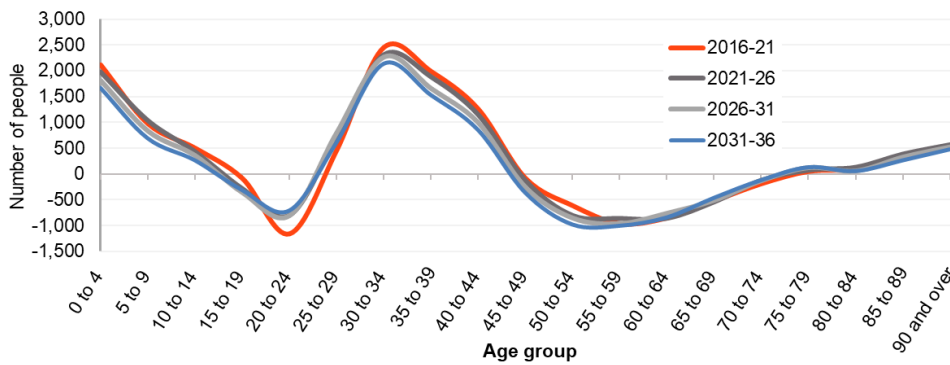
Source: .id, Hornsby Shire Forecasts (forecast.id), 2019

- Some level of ageing is expected to occur in the Shire, with elderly persons increasing notably. The median age is forecast to increase slightly from 38.8 to 39.3 years.
- Changes between 2016 and 2036 include:
 - Decreasing share of 0-4 years from 6.1% to 5.8%
 - Decreasing share of 5-17 years from 17.8% to 16.5%
 - Increasing share of 18-39 years from 26.4% to 27.2%
 - Decreasing share of 40-69 years from 38.7% to 36.4%
 - Increasing share of population aged 70 and over from 11.0% to 14.1%

Drivers of change

- The main drivers of change in Hornsby Shire relate to growth from new dwellings (total growth) and the people attracted (or not) to the Shire (migration).
- Most development, currently focused in High Density Residential (R4) and Medium Density Residential (R3) zones in places such as Asquith, Waitara and Hornsby, will cease over the next decade as all available capacity is utilised.
- As no additional 'up-zonings' are assumed in these forecasts, the Hornsby Town Centre is expected to become the focus of residential development over time.
- Hornsby Shire's dominant housing market role is assumed to continue as a destination for young and mature families, but there is expected to be a lower loss of ages 20-24. See Figure 3 below.
- Hornsby Shire is forecast to lose retirees (50-69 years) and gain elderly persons (80+ years). The number of persons in aged care is forecast to rise from 1,860 in 2016 to 2,540 in 2036.

Figure 3. Assumed net migration by five-year period, 2016-2036



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

Meeting Council’s obligations - comparison with State Government projections

- ▣ The forecasts assume an additional 14,879 dwellings in Hornsby Shire from 2016-2036.
- ▣ This represents 16.1% of the North District’s overall 20-year strategic housing target of 92,000 dwellings to 2036. The share decreases over time. See Table 1 below.

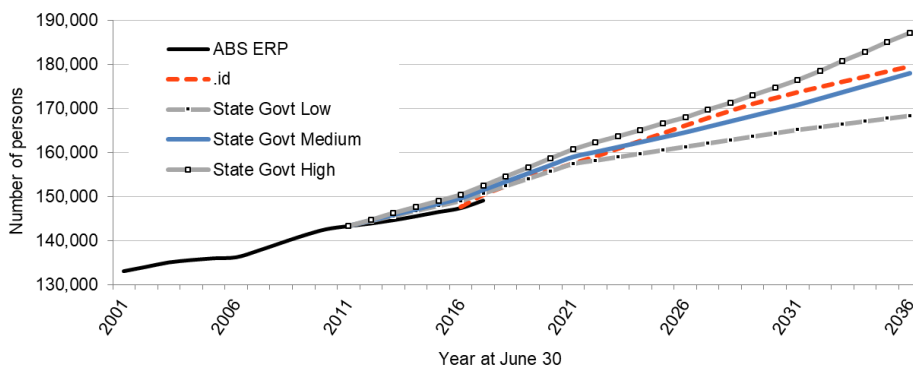
Table 1. Historical and forecast dwelling gain, Hornsby Shire and Northern Sydney, 1996-2036

	1996-01	2001-06	2006-11	2011-16	2016-21	2021-26	2026-31	2031-36
Hornsby dwelling gain	3,282	3,443	1,198	1,598	4,459	3,758	3,578	2,996
Northern Sydney District	14,037	13,909	12,589	19,422	25,950	22,017	22,017	22,017
Hornsby %	23.4%	24.8%	9.5%	8.2%	17.2%	17.1%	16.3%	13.6%

Source: ABS, Census of Population and Housing; .id, Hornsby Shire Forecasts (forecast.id), 2019

- ▣ These forecasts align closely to the New South Wales (NSW) State Government medium growth scenario. The figures are slightly higher in the period from 2026 to 2031, before almost converging at 2036. See Figure 4 below.
- ▣ These forecasts assume a higher rate of development (+1,329 dwellings), as well as a higher average household size than the State Government medium growth scenario.

Figure 4. Population Comparison Hornsby Shire, Historical and forecast, 2001-2036



Source: ABS, Regional Population Growth; .id, Hornsby Shire Forecasts (forecast.id), 2019; Department of Planning and Environment, 2016 NSW population and household projections.

Impact of forecasts on land use planning and other services

- ▣ The forecasts suggest that Council's current planning framework allows the Shire to meet its obligations to provide adequate housing to 2036.
- ▣ These forecasts will feed policy which may result in revisions to the forecasts, because of the potential for a changed Hornsby Local Environmental Plan (LEP).
- ▣ The delivery of additional housing does provide for greater overall choice, but recent development has been highly concentrated in two-bedroom, high density apartments. This dwelling type tends to attract working, young adults on above average incomes and does not generally provide for affordable housing.
- ▣ The forecasts assume some short-term growth in aged care beds, reiterating the role that the Shire plays in residential aged care. However, no further increases are assumed beyond 2026.
- ▣ The impact of the population forecasts in generating local employment growth are twofold. There is the general increase in local employment that occurs as a result of a growing population to 2036 (e.g. retail, health and education). The other increase relates to the potential of growth in major centres, especially the Hornsby Town Centre.
- ▣ Positioning the Hornsby Town Centre as a focus of residential development may attract greater private sector and State Government investments.
- ▣ The population growth, as well as changing age structure and household types at the suburb / locality level are likely to have a bearing on Council's provision of services.
- ▣ In growth areas, there will be pressure to provide a greater number of services including health, educational, cultural, recreational and other community facilities.
- ▣ In other areas such as Castle Hill, Arcadia – North Western Rural and Berowra Heights – North Eastern Rural Balance, the expected decrease in population and overall ageing of the population may create challenges relating to the continuation of existing services.
- ▣ The forecasts provide a useful insight as to how specific services provided to Hornsby Shire residents may need to grow and change based on changes to population by age and changes to the household mix.

Data

- ▣ Detailed data by single year of age for each area is available on the website. <https://forecast.id.com.au/hornsby>
- ▣ For detailed maps of all forecasts areas in Hornsby Shire refer Appendix 1.

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List of Abbreviations

ABS – Australian Bureau of Statistics

ERP – Estimated Resident Population

.id - .id the population experts

LGA – Local Government Area

LEP – Local Environmental Plan

LSPS – Local Strategic Planning Statement

NSW – New South Wales

SAFi – Small Area Forecast Information (.id the population experts' independent forecasts)

1. Background and Introduction

In 2018, the Greater Sydney Commission released the North District Plan as part of the '*Towards Our Greater Sydney 2056*' Strategic Plan. The Plan sets strategic directions for Northern District Councils to manage future growth and associated social, environmental and economic issues.

In addition, the *Environmental Planning and Assessment Act 1979* (EP&A Act) was amended to require Councils to prepare a Local Strategic Planning Statement (LSPS). It is intended that the LSPS will set a 20-year vision to guide land use activities and identify unique local character and identity, community values and underpin strategies to manage growth and change into the future. Strategic directions contained within the Hornsby LSPS should be consistent with the directions within the North District Plan and should be reflective of Council's Community Strategic Plan.

To complete the LSPS, Hornsby Shire is undertaking a range of studies across the themes of Liveability, Sustainability, Productivity and Infrastructure, as well as Collaboration. These studies are part of an endorsed Accelerated Hornsby Shire Local Environmental Plan (LEP) Review project, supported by the State Government.

One of the fundamental inputs to these studies is an understanding of how Hornsby Shire's population is likely to grow and change into the future. Consequently, .id was engaged by Council to provide population and household forecasts to 2036. The forecasts provide the demographic and spatial context for change in the Shire, as well as underpinning Council's planning direction and informing the long-term direction of Council's activities.

This report is designed to describe the assumptions, analyse the results and interpret the forecasts to provide Council with useful information that can inform different studies. It is important to note that forecasts are available to 2041, but the analysis presented below focuses exclusively on the 2016-2036 period to align with the State Government framework for the LSPS.

2. Approach to the forecasts

The forecasts are based on minimal changes to the current planning framework in Hornsby Shire. They assume that the current Hornsby Shire Local Environmental Plan (LEP), with the addition of large new residential opportunities in the Hornsby Town Centre and development on Government land around the Metro Station at Cherrybrook, would satisfy the Council's obligations to provide enough new dwelling opportunities as prescribed by the North District Plan.

The net dwelling gain in Hornsby Shire over the period from 2016-2036 is assumed to be 14,879. This represents 16.1% of the required 92,000 dwellings for the Northern Sydney region as identified in the North District Plan. The forecasts also indicate a net increase of 4,459 dwellings from 2016-2021², which exceeds the 0-5 year supply target from the North District Plan of 4,350 dwellings.

However, it is important to note that the interaction between population and dwelling forecasts and the planning policies are correlated. The last five years have indicated a solid demand for medium and high-density housing options in many parts of the Shire, such as Asquith, Beecroft, Hornsby, Thornleigh and Waitara. These opportunities are assumed to diminish over time, with more of the residential development assumed to occur in the Hornsby Town Centre. Therefore, these forecasts provide a base-case scenario for planning, with the simple caveat that changes may occur to the planning regime that may facilitate more or less residential development over time.

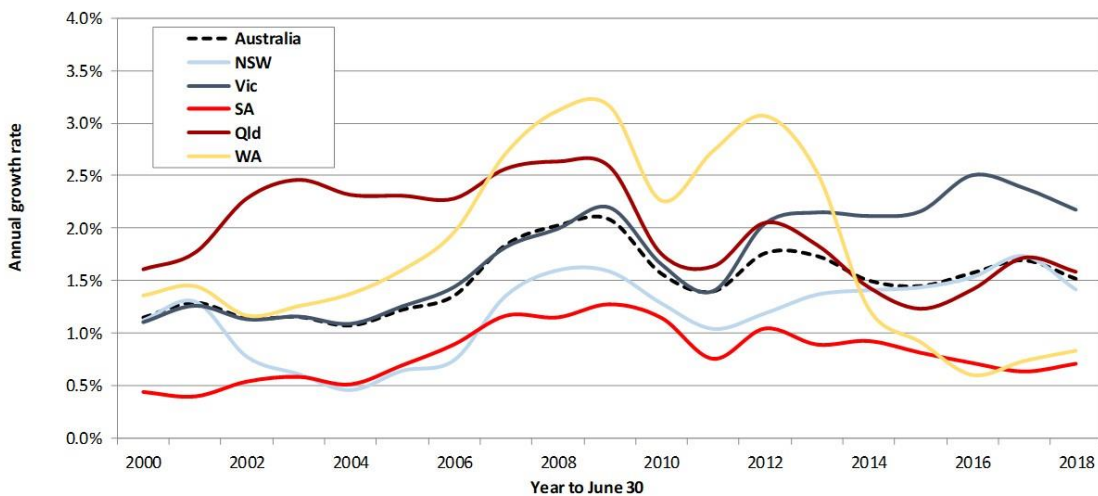
It is also important to acknowledge the broader policy imperative. With the consistently strong rates of population growth in Sydney over the last ten years and a chronic housing undersupply, more areas have needed to be identified across Sydney for greater housing density. As population pressures increase or decrease, the demand for housing will similarly ebb and flow. The importance of the macro-level growth pressure in driving more housing development in Hornsby Shire is explored in the next chapter.

² The 2016-20 data are based on completed projects since the 2016 Census, as well as those under construction. The 2021 dwelling assumptions are based on approved applications.

3. Broader population growth trends

Population growth in Hornsby Shire needs to be understood in the broader growth context of NSW and Australia. After the Olympics boom of the 1990s and early 2000s, population growth in NSW decreased. As population growth recovered in Australia from 2007 onwards, population growth has exceeded 1% per annum in NSW, with metropolitan Sydney being the focus for growth. The share of Australian growth exhibited in NSW has increased especially since the end of the mining construction boom around 2011. See Figure 5 below.

Figure 5. Annual population growth, Australia and Major States, 2000-2018



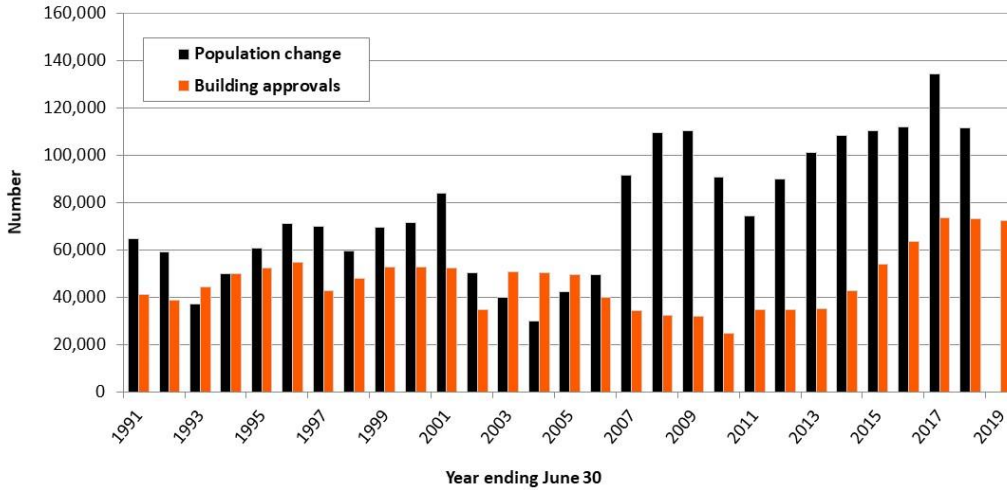
Source: ABS, Australian Demographic Statistics

This large increase in population growth has been driven by large increases in overseas migration and a slowing amount of interstate migration loss. The attractiveness of NSW as a destination has increased as employment opportunities have grown and as the fortunes of other states, especially Western Australia, have declined. With the increased population growth in the State, however, an imbalance began to emerge between growth in people and housing provision.

Since 2007, when net population growth began to accelerate, the construction of new dwellings was slow to match the increase in demand. This pattern was not isolated to NSW. Many parts of Australia experienced an increase in population pressures from 2006-07 onwards, without an accompanying increase in dwelling construction. One of the key factors in this process was the Global Financial Crisis commencing in 2007-08. The increasing difficulty for Australian banks to access funds on global markets to fund large-scale construction projects and their reluctance to lend to mortgagees amplified this imbalance. Another reason for this mismatch relates to the large numbers of construction workers attracted to mining projects, most notably in Western Australia and Queensland. Since 2012-13, the

rate of dwelling approvals and construction has increased markedly in NSW, with the impact on supply and price growth especially noticeable in the last two years. See Figure 6 below.

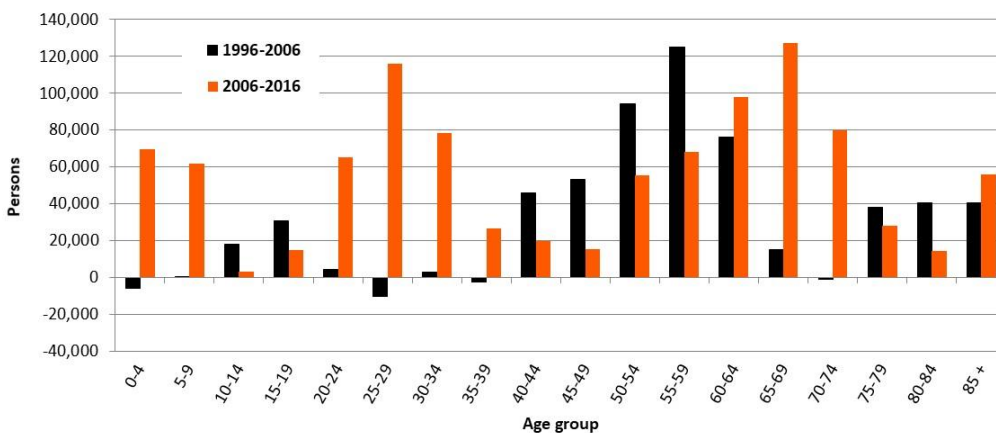
Figure 6. Population growth and building approvals, New South Wales, 1991-2019



Source: ABS, Australian Demographic Statistics; ABS, Building Approvals, Australia

The increased population growth has had a marked impact on the age structure of NSW. The State was ageing at a strong rate during the 1990s and early 2000s. This was driven by subdued overseas migration, significant interstate migration loss, falling fertility rates and higher life expectancy. The effect of this ageing was to have little growth in ages under 40, with the largest increases being those in the middle-age groups (40-64) and elderly (75+ years). See Figure 7 below. The increased migration to the State between 2006 and 2016 has resulted in large increases in young adults and young families, which offset at least part of the increases in the older age groups (50+ persons), especially the baby boomers in their sixties and early seventies.

Figure 7. Change in the New South Wales population by five-year age group, 1996-2016

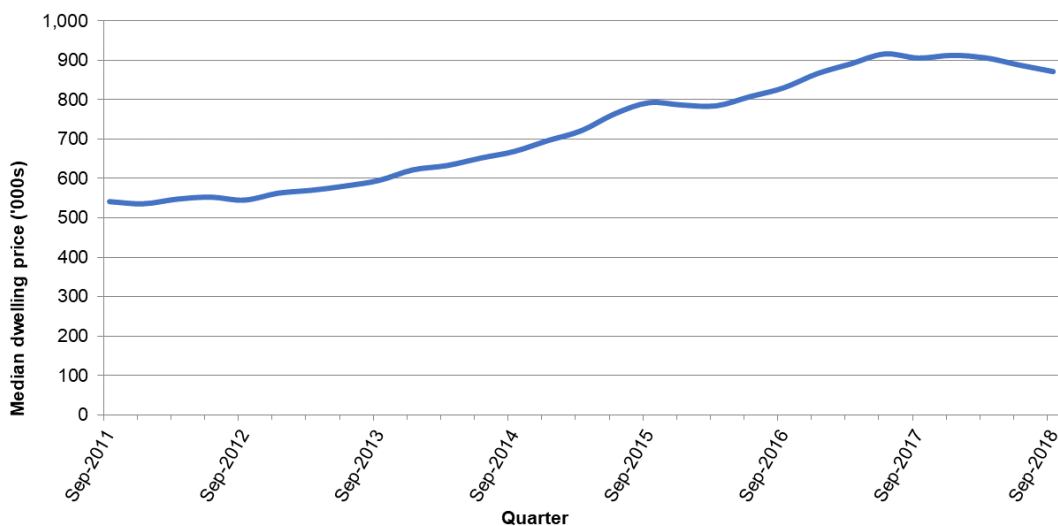


Source: ABS, Australian Demographic Statistics

There are indications that the overall population pressure in NSW may be starting to decrease. The Australian Bureau of Statistics (ABS) estimates that the share of overseas migration is still high, but it has fallen to 37.5% of national migration since its peak of 40.1% in 2017. Similarly, net interstate migration loss from NSW has increased markedly in the past three years, from a net loss of 6,780 persons in 2015 to 21,670 persons in 2018.

The impact of the increased housing supply, with a slight slowdown in population growth has been seen in median house prices across the State, especially metropolitan Sydney. Housing price growth in NSW grew especially strongly from 2013 to 2017 at an average rate of more than 12% per annum. Since the peak of prices in mid-2017, dwelling prices have fallen by 5 per cent. See Figure 8.

Figure 8. Median Dwelling Price by quarter, New South Wales, 2011-2018



Source: ABS, Residential Property Price Indexes: Eight Capital Cities

This trend of lower population growth in NSW may continue. This is due to the potential for overall rates of growth in Australia to fall, as well as the relativities between States. The rate of population growth is a hot topic with public concern that growth in Sydney is increasingly unsustainable, especially due to perceived and increasing infrastructure deficit in the city. One of the reasons for high population growth in NSW and Victoria is the comparatively poor economic performance of Western Australia and Queensland. As these States recover from their post-mining boom economic slumps, they will attract a greater share of overseas migration and more interstate migrants, further relieving pressure on growth in NSW and Sydney.

4. Hornsby Shire - Residential Role and Function

a) Development history

Hornsby Shire has developed its role in the Sydney housing market over the previous decades. Like many areas that are at the urban / rural interface, the Shire is especially attractive to families seeking larger detached dwellings, within an area that offers significant natural beauty and high amenity. The attractions of the Shire include excellent public and road transport links, high quality and varied secondary school opportunities and access to a strong job catchment in northern and central Sydney.

The most significant period of residential development in the Shire was from the late 1940s to the 1980s. In terms of overall land area, the Shire is dominated by National Parks and reserves, but most of these are in the north. By the 1980s, the number of areas that remained for greenfield residential development had fallen and higher rates of infill and redevelopment began. By the 1990s, most of the available southern areas of the Shire had been urbanised, especially as places such as Castle Hill and Cherrybrook were developed. The process of greater density has continued, with redevelopment of residential and commercial areas, especially around railway stations at Hornsby and Waitara. Further residential development in central Hornsby would reinforce its position as a regional employment, retail and commercial hub.

As Table 2 below indicates, Hornsby Shire played a critical role in new dwelling provision during the late 1990s and early 2000s. This was driven by remnant greenfield development in Cherrybrook, Castle Hill and Dural, as well as medium and high-density development in Hornsby and Waitara. However, new residential development from 2006 to 2016 was far lower. As Northern Sydney and Sydney more generally experienced significant increases in housing stock from 2011-2016, there was relatively little increase in Hornsby Shire.

Table 2. Historical dwelling gain, Hornsby Shire and Northern Sydney, 1996-2016

	1996-01	2001-06	2006-11	2011-16
Hornsby Shire dwelling gain	3,282	3,443	1,198	1,598
Northern Sydney District	14,037	13,909	12,589	19,422
Hornsby Shire %	23.4%	24.8%	9.5%	8.2%

Source: ABS, Census of Population and Housing

However, with the finalisation of the Hornsby Shire Housing Strategy in 2011, new areas were identified for medium and high-density development. These included parts of the suburbs of Asquith, Beecroft, Mount Colah and Thornleigh, as well as the continuation of development around Hornsby and Waitara. In line with the new zoning, development has increased since 2016, and Hornsby Shire is on track to deliver a net increase of 4,500 dwellings between 2016 and 2021, about 17% of Northern Sydney's net dwelling gain. This figure is sufficient to meet State Government dwelling targets.

These numbers have also been boosted by increases in density have been less overt in the more 'suburban' areas of the Shire. The impact of State policies to encourage smaller, more affordable and seniors housing has been noticeable. There has also been a proliferation of small-scale granny flats (secondary dwellings). The other impact has come from the State Environmental Planning Policy (Housing for Seniors or People with a Disability) regulations, which as the name suggests, encourages development of housing for seniors or people with a disability. These regulations have had an impact across Hornsby Shire, most notably the rural areas in recent times, with some aged-care and seniors living being built in areas with less established services. Furthermore, there are several current proposals, either approved or seeking site compatibility from State Government to build seniors housing and aged care in places such as Dural, Glenorie and Galston.

As of 2016, the dwelling stock of Hornsby Shire featured more than 72% detached houses. Despite the greater densities, the impact of current zoning and potential for increases in dwelling density in the Hornsby Town Centre and Cherrybrook, the dwelling stock in Hornby Shire is likely to remain predominantly detached well beyond 2036.

b) Role of migration

The main reasons for population growth from migration in Hornsby Shire are:

- Overseas migration.
- Internal Sydney migration from the south and the south-west, especially the Local Government Areas (LGAs) of Parramatta, Ryde and Cumberland.

The main reasons for population loss from migration in Hornsby Shire are:

- Interstate migration loss, especially to South East Queensland and Melbourne.
- Loss to Sydney growth areas, especially The Hills Shire.
- Loss to the Central Coast
- Loss to Regional New South Wales (NSW), especially coastal areas to the north, especially the Mid-North Coast, the Lower Hunter region around Newcastle, as well as the Central West

The major migration flows to and from Hornsby between 2011 and 2016 are summarised in Table 3 below:

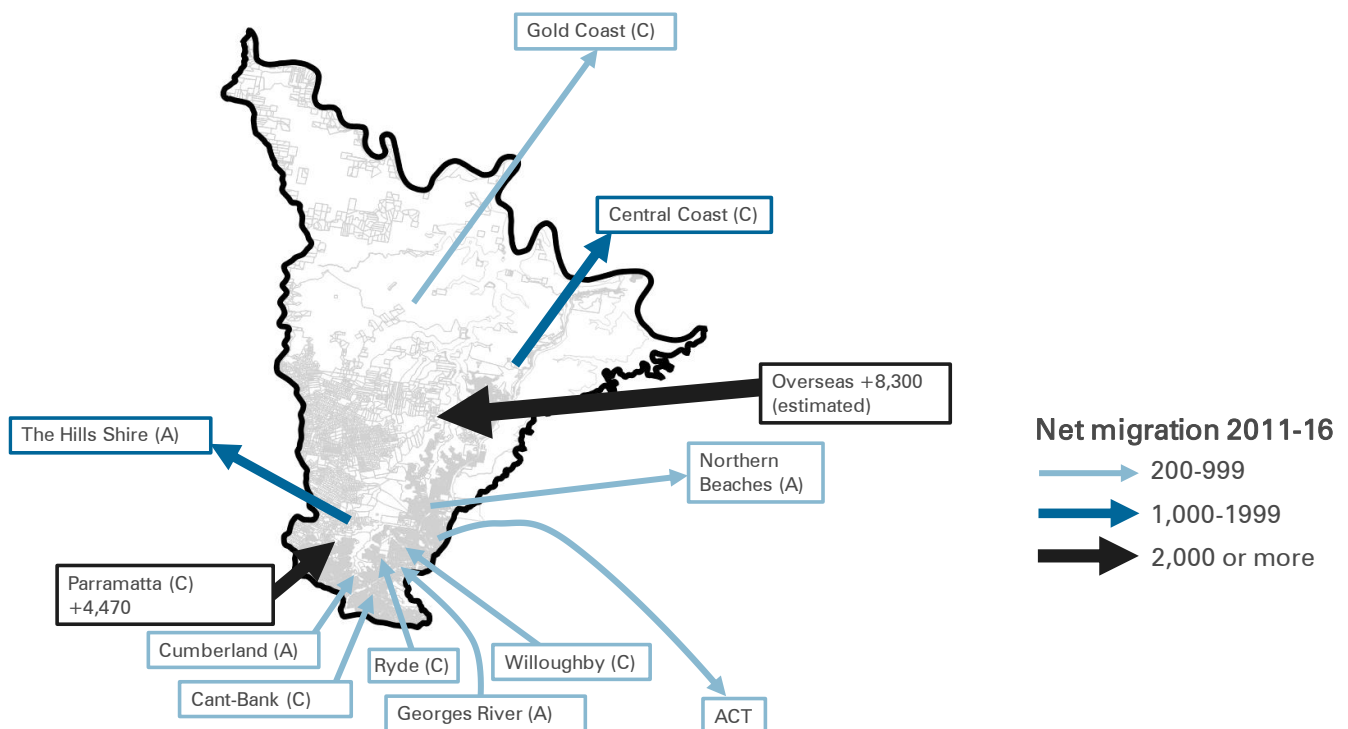
Table 3. Major migration flows, Hornsby, 2011-2016

Region	In-Migration	Out-migration	Net Gain
Sydney Metro	21,470	17,011	4,459
Central Coast	885	2,550	-1,665
Regional NSW	1,603	3,029	-1,426
Queensland	641	1,377	-736
Victoria	533	925	-392
Other States & Terr.	705	1,158	-453
Total	25,837	26,050	-213
Overseas	9,382		9,382

Source: ABS, Census of Population and Housing

In net terms, the migration flows in and out of Hornsby Shire tend to cancel themselves out, with the in-migration of overseas migration providing the main impetus for growth. At the Local Government Area level, the bulk of large net moves are within Sydney. Like most parts of Sydney, Hornsby Shire is affected by the general flows of people following outward, sectoral movements. The largest sources of population growth to the Shire are from Parramatta, Ryde, Cumberland and Willoughby Local Government Areas. See Map 1 and Table 4 below.

Map 1. Major net migration flows by LGA, Hornsby, 2011-2016



Source: ABS, Census of Population and Housing

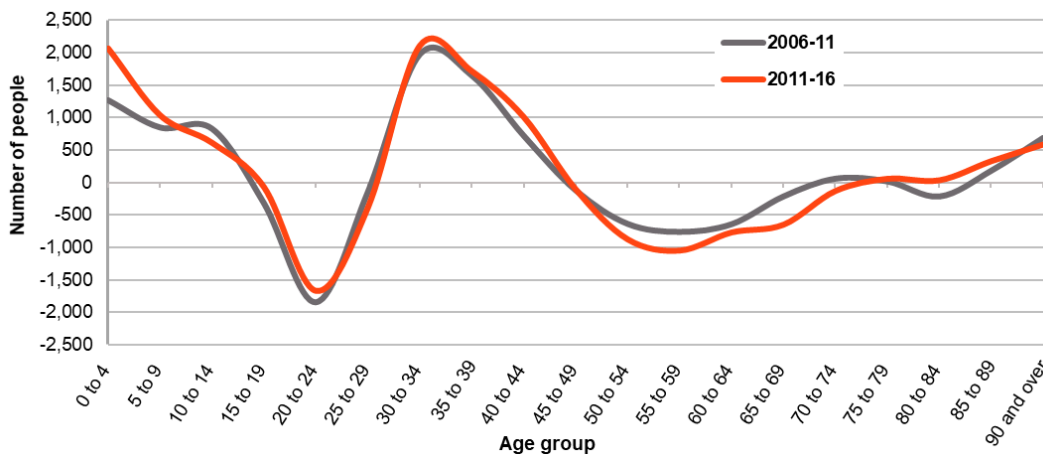
Table 4. Top ten net migration gains and losses by LGA, Hornsby Shire, 2011-16

Top ten net gains		Top ten net losses	
LGA	Net Gain	LGA	Net Loss
Parramatta	4,470	Central Coast	-1,665
Ryde	673	The Hills Shire	-1,199
Cumberland	519	Northern Beaches	-360
Willoughby	357	Gold Coast	-217
Georges River	292	ACT	-201
Canterbury-Bankstown	264	Blacktown	-198
Rockdale	157	Port Macquarie-Hastings	-186
Burwood	121	Hawkesbury	-182
Canada Bay	118	Lake Macquarie	-169
Strathfield	84	Ku-ring-gai	-169

Source: ABS, Census of Population and Housing

The bulk of net gain by age to Hornsby Shire is people in the family age groups. The largest net increases come from the ages 0-14 and 30-44 years. As Figure 9 below shows, there has been a relatively consistent pattern over the two census periods from 2006 to 2016. The role as a major provider of aged care and seniors housing is well developed. The impact of this role means that there is a gain to the Shire of persons aged 85 and over. It is worth noting the numbers from 2006-11 are lower as a result of out-migration of these age groups due to the redevelopment of the Anglicare Village at Castle Hill.

Figure 9. Net implied migration by five-year age group, Hornsby Shire, 2006-2016



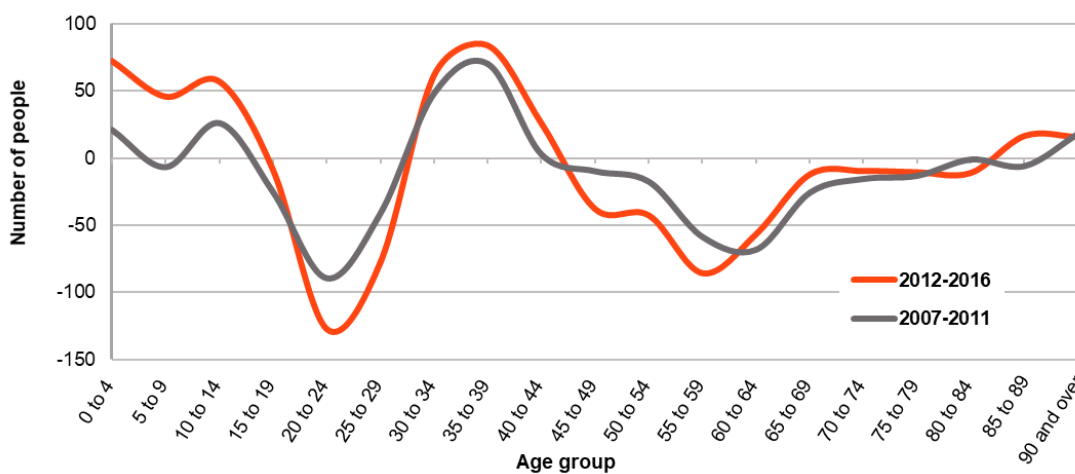
Source: .id: implied net migration

By contrast, Hornsby Shire tends to lose young adults (18-25 year olds) through migration. The reasons for this loss include a lack of appropriate housing options and general housing affordability, as well as poorer access to tertiary education, compared to other areas in the Sydney metropolitan area. These ages tend to migrate to the inner city (Sydney, Inner West and North Sydney LGAs), as well as The Hills Shire.

The general lack of housing affordability in the Sydney housing market and the substantial growth in house prices over the past decade also has a large impact on Hornsby Shire. Many of the older residents and retirees whose children have left home have and will continue to leave the Shire. People aged 50-69 are especially prone to leaving the area. The incentive to leave is to make a capital gain and migrate to more affordable parts of the State, including the Central Coast, the Mid-North Coast, as well as The Hills Shire.

Many areas within Hornsby Shire follow the general pattern by age of attracting families and elderly persons, while losing young adults and retirees. As Figure 10 below shows, there are strong similarities between the pattern exhibited in Hornsby Heights when compared to the Shire as a whole in Figure 9.

Figure 10. Net implied migration by five-year age group, Hornsby Heights, 2006-2016



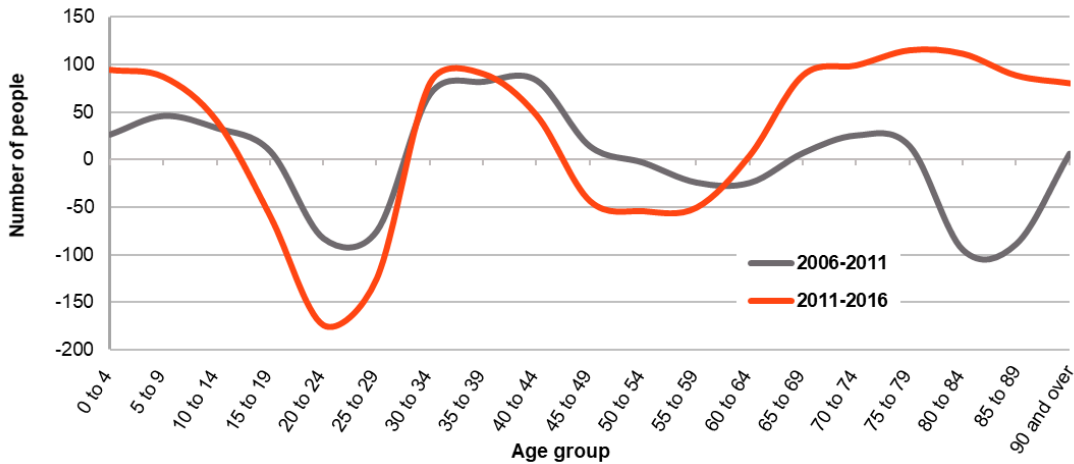
Source: .id: implied net migration

The following areas in Hornsby Shire are expected to follow a similar pattern to that exhibited between 2006 and 2016 into the future.

- ▣ Beecroft-Cheltenham
 - ▣ Berowra
 - ▣ Berowra Heights- North Eastern Rural
 - ▣ Galston-Middle Dural
 - ▣ Hornsby Heights
- ▣ Mount Colah-Mount Kung-gai
 - ▣ North Epping
 - ▣ Pennant Hills
 - ▣ Thornleigh
 - ▣ West Pennant Hills

By contrast, the implied migration profile in Castle Hill changed markedly with a large difference in the net migration of persons aged 65 and over. This was because of more housing opportunities provided in the Anglicare Village between 2011 and 2016 period compared to the loss of stock between 2006 and 2011. See Figure 11 below.

Figure 11. Net implied migration by five-year age group, Castle Hill, 2006-2016



Source: .id: implied net migration

The migration pattern exhibited in Castle Hill between 2011 and 2016 is representative of a group of areas in the Shire. These areas attract family aged persons, lose young adults and retirees, but gain a much higher share of elderly persons. These areas are expected to continue to perform the same housing market role into the future.

Areas that are forecast to follow the Castle Hill pattern during the period from 2016 to 2036: include:

- ▣ Arcadia-North Western Rural
 - ▣ Brooklyn
 - ▣ Castle Hill
 - ▣ Cherrybrook
- ▣ Dural
 - ▣ Normanhurst
 - ▣ Wahroonga
 - ▣ Westleigh

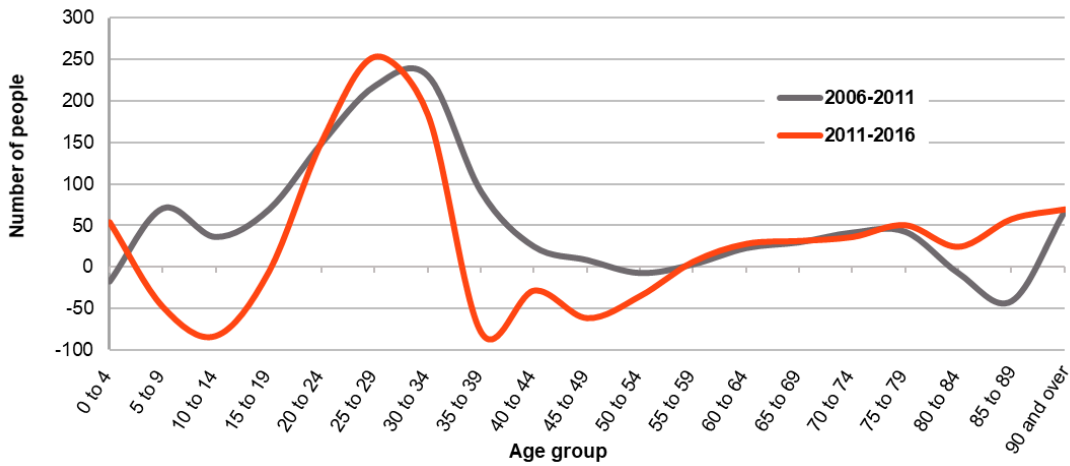
The areas with a higher share of medium and high-density housing, most notably Hornsby and Waitara, attract the inverse of the Hornsby Shire pattern. These areas gain persons aged 20-34 and older adults (60-79 years). See Figure 12 below.

It is assumed that places like Asquith, Mount Colah and Cherrybrook will be affected by young adult in-migration into the future as the dwelling stock of these areas diversifies over time. This means that these areas are likely to attract people in their twenties, where previously those ages were a source of

net migration loss. Areas within Hornsby Shire that are assumed to have this pattern over the forecast period to 2036 include:

- ▣ Asquith
 - ▣ Hornsby Town Centre
- ▣ Hornsby (non-Town Centre area)
 - ▣ Waitara

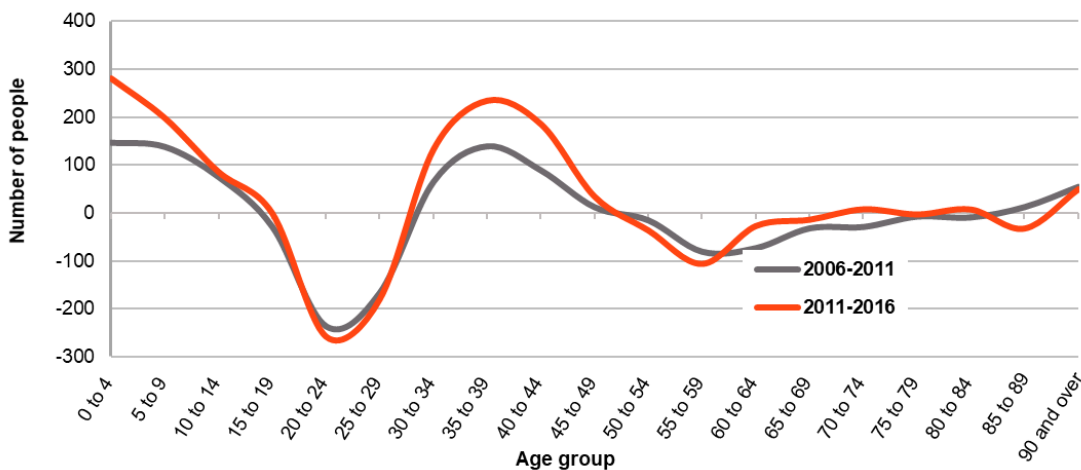
Figure 12. Net implied migration by five-year age group, Waitara, 2006-2016



Source: .id: implied net migration

Another important consideration is how areas may change over time. This usually relates to the amount of new dwelling stock approved and any changes to the existing dwelling stock, such as the redevelopment of retirement villages and aged care. For example, Beecroft-Cheltenham attracted far more families in the 2011-2016 period, even though many of the dwellings constructed were medium and high density. This is because the additional housing provided opportunities for new residents in the area, as well as providing ‘down-sizing’ options for retirees and the elderly. See Figure 13 below.

Figure 13. Net implied migration by five-year age group, Beecroft-Cheltenham, 2006-2016



Source: .id: implied net migration

5. Forecast population, dwelling and household change

The total population of Hornsby Shire is expected to grow from 147,661 in 2016 to 179,582 in 2036. This increase of 31,921 persons is equal to an average of 1.0% per annum from 2016-2036. This growth is based on an increase of almost 14,300 households, with the average household size decreasing from 2.91 to 2.75 persons per dwelling. The household forecasts are based on an increase of just under 14,900 dwellings, with the vacancy rate assumed to remain at about 3.7% from 2016-2036.

Population Growth Rate 2016 - 2036

1.0% p.a.

2006 – 2011
2011 – 2016

1.0% p.a.
0.6% p.a.

Dwelling Growth Rate 2016 - 2036

1.3% p.a.

2006 – 2011
2011 – 2016

0.5% p.a.
0.5% p.a.

Population growth in the Shire has been subdued from 2011 to 2016. These forecasts assume a higher rate of population growth in the short-term compared to both the 2006-2011 and 2011-2016 periods. This is due to higher rates of residential development. However, the assumed dwelling gain is expected to decrease as current residential opportunities are exhausted, meaning that dwelling and population growth will slow over time. See Table 5 below for details by five-year period.

Table 5. Forecast population summary, Hornsby Shire, 2016-2036

Data	2016	2021	2026	2031	2036	2041
Population	147,661	157,538	166,158	173,721	179,582	185,263
Change in pop. (5yrs)	-	9,877	8,619	7,564	5,860	5,681
Average annual % change	-	1.30%	1.07%	0.89%	0.67%	0.62%
Dwellings	51,753	56,212	59,988	63,610	66,632	69,354
Change in dwellings (5yrs)	-	4,459	3,776	3,622	3,022	2,722
Households	49,864	54,071	57,748	61,240	64,156	66,781
Change in households (5yrs)	-	4,207	3,677	3,492	2,916	2,625
Average h/hold size	2.91	2.86	2.82	2.79	2.75	2.73

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

The overall growth masks significant differences in growth rates by area within Hornsby Shire. There is a strong correlation between household growth and population growth. However, the demographic changes within each area will be different, with some areas expected to experience a larger drop in average household size or larger increases in aged care. This will lead to different growth outcomes

across the Shire. Areas with a large share of mature families such as Castle Hill, Berowra Heights - North Eastern Rural Balance and Cherrybrook are expected to experience a larger drop in average household sizes than the average for the Shire. This is due to the large out-migration of young adults leaving the family home. See Tables 6 and 7 below.

Table 6. Forecast household change, Hornsby Shire Areas, 2016-2036

Area	2016	2036	Net change	% change (av. annual)
Hornsby Town Centre	208	3,211	3,003	14.7%
Asquith	1,240	3,445	2,205	5.2%
Waitara	2,477	4,003	1,526	2.4%
Hornsby (non-Town Centre area)	8,611	10,078	1,467	0.8%
Cherrybrook	5,999	7,105	1,106	0.8%
Mount Colah - Mount Kuring-gai	3,007	3,898	891	1.3%
Thornleigh	2,812	3,595	783	1.2%
Beecroft - Cheltenham	2,845	3,597	752	1.2%
Pennant Hills	2,605	3,188	583	1.0%
Wahroonga	1,451	1,779	328	1.0%
Galston - Middle Dural	1,177	1,467	290	1.1%
West Pennant Hills	1,372	1,635	263	0.9%
Dural	1,827	2,046	219	0.6%
Normanhurst	1,807	1,976	169	0.4%
Berowra	1,562	1,721	159	0.5%
Berowra Heights - North Eastern Rural Balance	2,193	2,323	130	0.3%
Arcadia - North Western Rural	1,266	1,371	105	0.4%
North Epping	1,550	1,644	94	0.3%
Castle Hill	1,957	2,045	88	0.2%
Hornsby Heights	2,081	2,149	68	0.2%
Westleigh	1,538	1,574	36	0.1%
Brooklyn	280	307	27	0.5%
Hornsby Shire Total	49,864	64,156	14,292	1.3%

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

The areas with the largest forecast household growth include the Hornsby Town Centre, Asquith, Waitara, Hornsby (non-Town Centre area) and Cherrybrook. In all cases, significant residential development opportunities have been identified. The bulk of this housing growth is expected in areas zoned R4 and R3 (high density and medium density), with the Hornsby Town Centre and Cherrybrook areas affected by higher density development around railway stations. The development in Cherrybrook has been assumed on Government owned land, with opportunities for high density around the metro station. Plans to rejuvenate the Hornsby Town Centre are also underway. There are already several proposals for large-scale residential developments in the West Side of Hornsby which will promote greater population in central Hornsby and likely to generate new investment and interest in the area.

By contrast, there are many areas where little household growth is expected. These are generally well-established suburbs or rural areas with few identified opportunities for greater densities and where the effect of secondary dwellings and granny flats is not expected to be significant. These areas include Brooklyn, Westleigh, Hornsby Heights, Castle Hill and North Epping.

Table 7. Forecast population change, Hornsby Shire Areas, 2016-2036

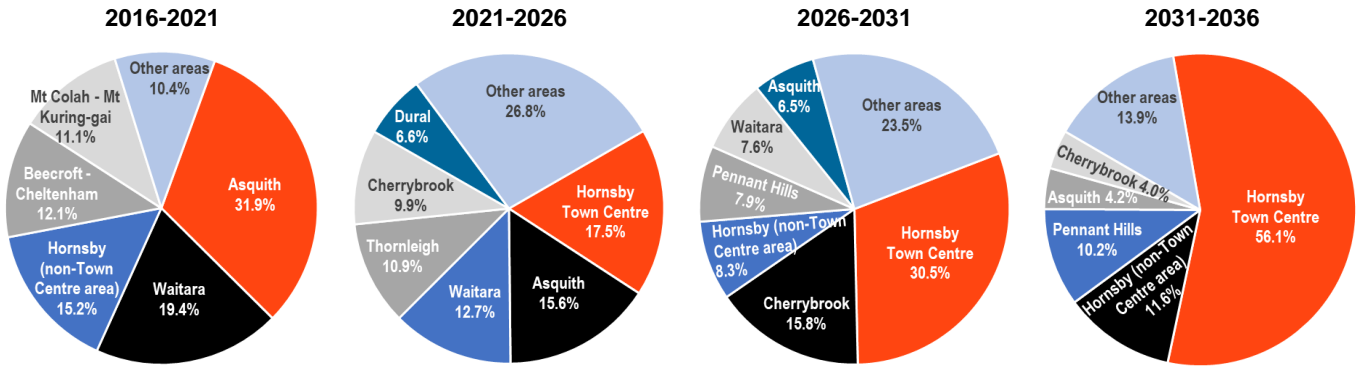
Area	2016	2036	Net change	% change (av. annual)
Hornsby Town Centre	467	7,582	7,115	15.0%
Asquith	3,663	8,898	5,235	4.5%
Waitara	5,900	9,407	3,507	2.4%
Hornsby (non-Town Centre area)	22,555	25,661	3,106	0.6%
Beecroft - Cheltenham	9,147	11,182	2,035	1.0%
Thornleigh	8,737	10,649	1,912	1.0%
Mount Colah - 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%
Hornsby Shire Total	147,661	179,582	31,921	1.0%

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

There is also an important temporal component to growth in Hornsby Shire, with the amount of growth expected to change by area over time. Over the first five years of the forecasts, there will be a greater share of growth in Asquith and Waitara. As the development opportunities in these areas reduce over the next five years, the Hornsby Town Centre is expected to become the centre of dwelling and population growth for the Shire. During the 2031-2036 period, more than half of population growth is expected to occur in the Town Centre. See Figure 14 below.

The spatial pattern of population growth over the first ten years of the forecasts reflects the amount of development around the larger centres within the Shire. The highest rates of growth are forecast for Asquith, Waitara and the Hornsby Town Centre, with lesser rates in Beecroft-Cheltenham, Thornleigh and Wahroonga. In the latter area, there is significant growth expected on the back of growth in seniors living including the redevelopment of the McQuoin Park aged care facility.

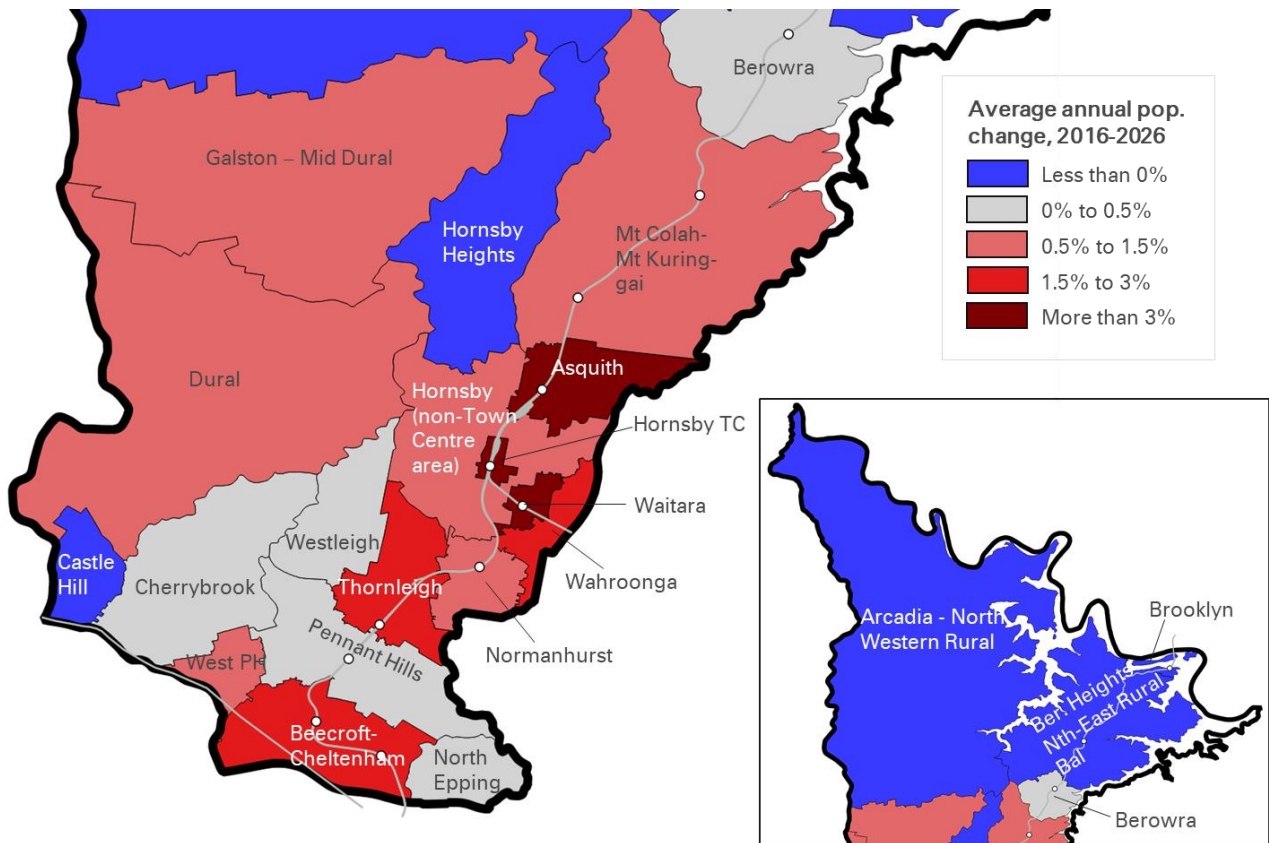
Figure 14. Share of population growth by area by period³



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

The northern areas of the Shire are generally expected to be stable or decrease in population. This is due to limited new dwelling growth and because average household size is likely to fall as many mature families transition to ‘empty-nesters’ with children leaving the family home. See Map 2 below.

Map 2. Population growth by area, 2016-2026



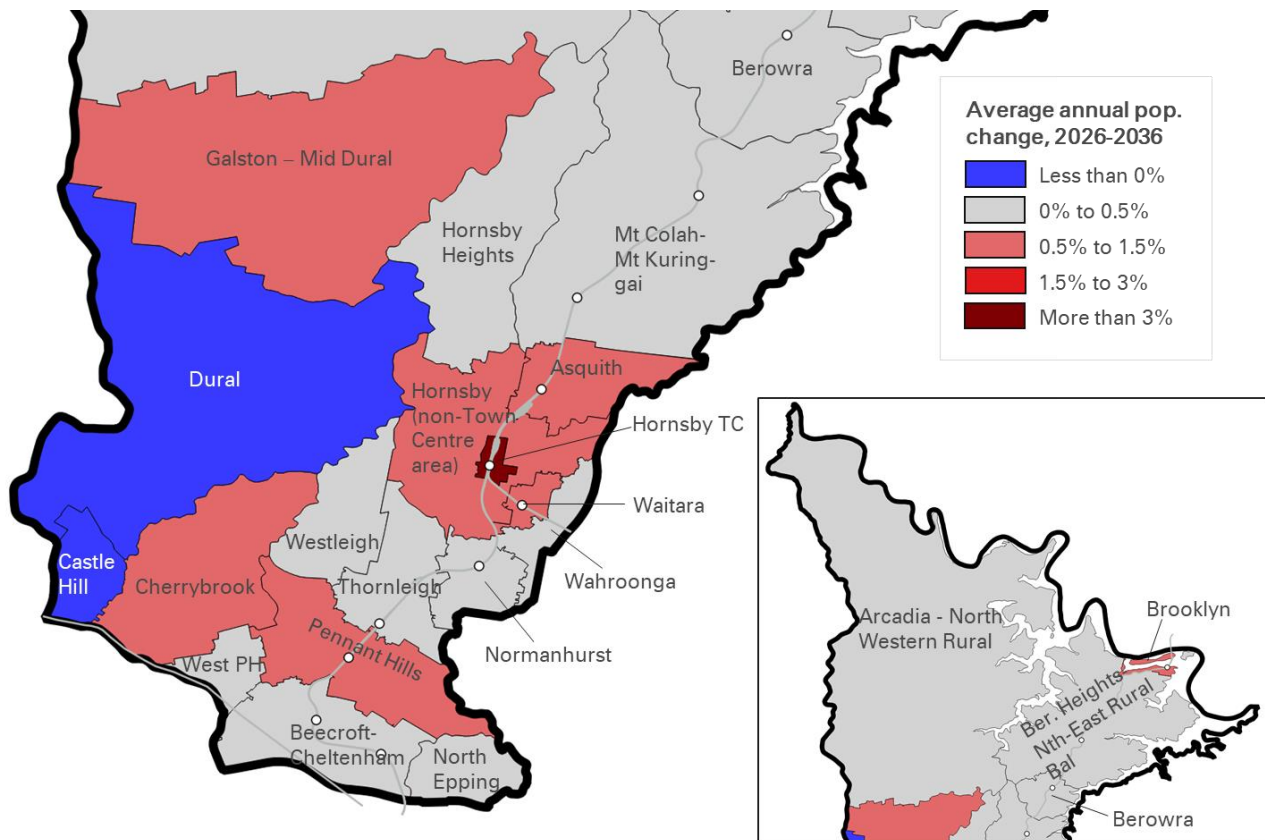
Source: .id, Hornsby Shire Forecasts (forecast.id), 2019

³ Other areas refers to the remaining areas in the Shire. Some of these areas may be decreasing in population.

For detailed maps of all areas in Hornsby Shire, please see Appendix 1.

This pattern changes significantly in the 2026-2036 period, as most of the growth in the Shire transfers to high density development in the Hornsby Town Centre. In this period, only the Town Centre is expected to grow by more than 3% per annum, with some growth continuing in places such as Cherrybrook, Hornsby (non-Town Centre area), Asquith, Pennant Hills, Galston-Mid Dural and Waitara. The population of the northern areas is forecast to stabilise, while only Castle Hill and Dural are expected to decrease in population, based on limited dwelling gain and decreasing household size. See Map 3 below.

Map 3. Population growth by area, 2026-2036

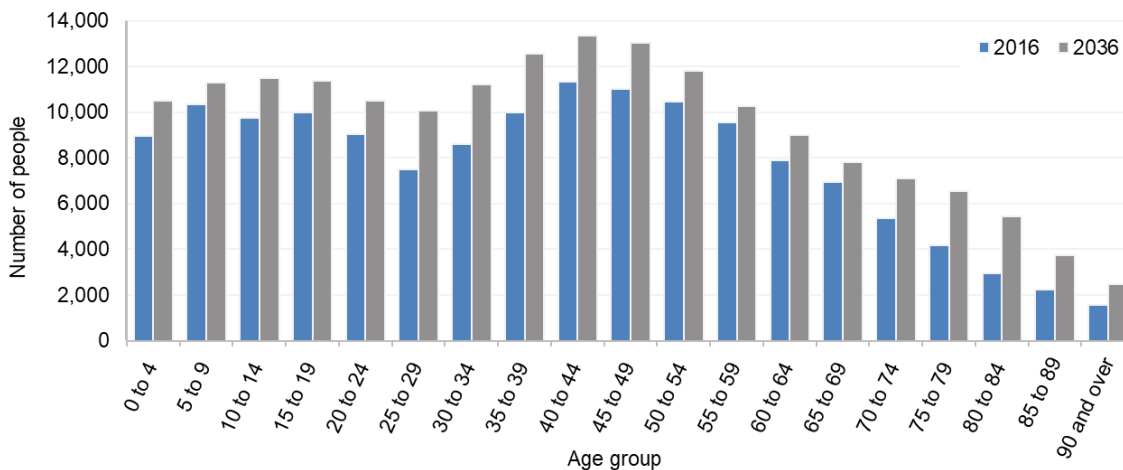


Source: .id, Hornsby Shire Forecasts (forecast.id), 2019

6. Forecast age structure

Like most areas in NSW, Hornsby Shire is expected to have a large increase in older people. However, the overall population is not expected to age dramatically. The nature of development around major centres, especially the Hornsby Town Centre, means that there is likely to be a much larger number of young adults than before. These developments are expected to attract young people from within Hornsby Shire, as well as from outside the area. As Figure 15 below indicates, the population is expected to grow in all age groups, with the distribution of the population to remain relatively similar at 2036 compared to 2016.

Figure 15. Population by age, Hornsby Shire 2016 and 2036

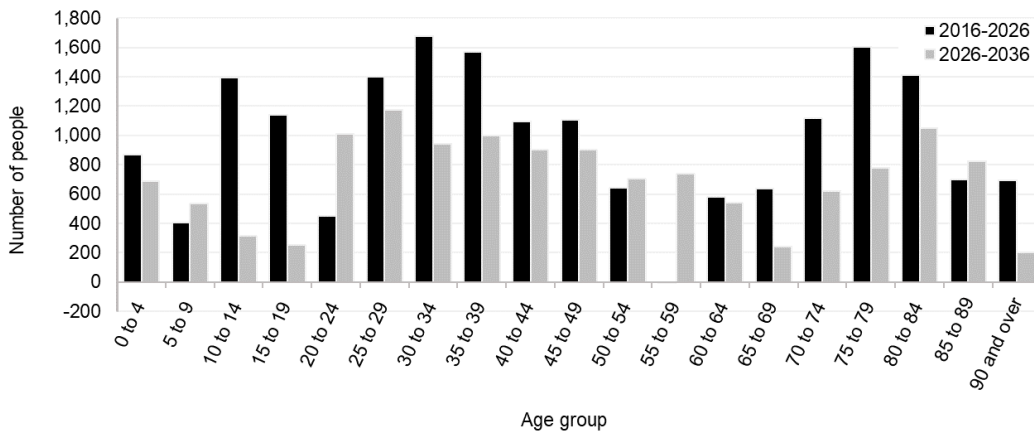


Source: .id, Hornsby Shire Forecasts (forecast.id), 2019

As development rates are expected to be faster in the first ten years, there is greater population growth in this period. Large increases are expected in the family age groups, especially 10-19 years and 35-54 years, as well as a large increase in persons aged 70-84 years. The increase in the ages 70 years and over is driven by ageing of baby-boomers in the Shire, but it is supplemented by the important role that Hornsby Shire plays in providing seniors living and aged care. The gain in persons aged 20-34 is driven by the medium and high-density developments, which are more likely to attract young adults and older persons than the traditional family housing market role that Hornsby Shire has played. See Figure 16 below.

The pattern of change is similar in the second period from 2026 to 2036. The growth is expected to be lower in line with the lower rates of residential development. Although there is a loss in population through migration in ages 50-69 in Hornsby Shire, the large numbers of persons ageing through these cohorts means that some net increase will occur in these age groups to 2036.

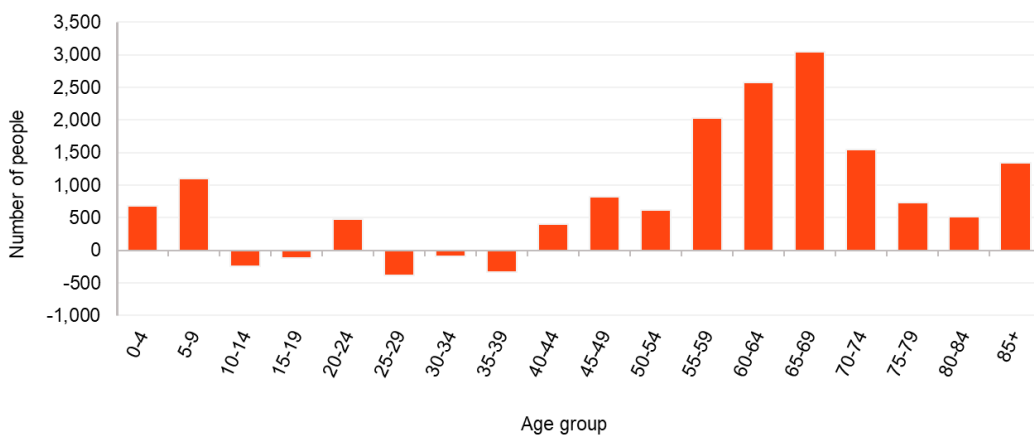
Figure 16. Change in population by age, Hornsby Shire, 2016-2036



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

These forecast changes are in stark contrast to the changes over the last fifteen years, where ageing has dominated. Most of the growth from 2001-2016 was experienced in ages 55 and over, with some population loss in family age groups. See Figure 17 below. The forecast reversal of this ageing trend relates to the impact of youthful migration in medium and high-density dwellings and a higher rate of development, providing more opportunities for all ages in the Shire.

Figure 17. Change in population by age, Hornsby Shire, 2001-2016



Source: ABS, Regional Population by Age and Sex

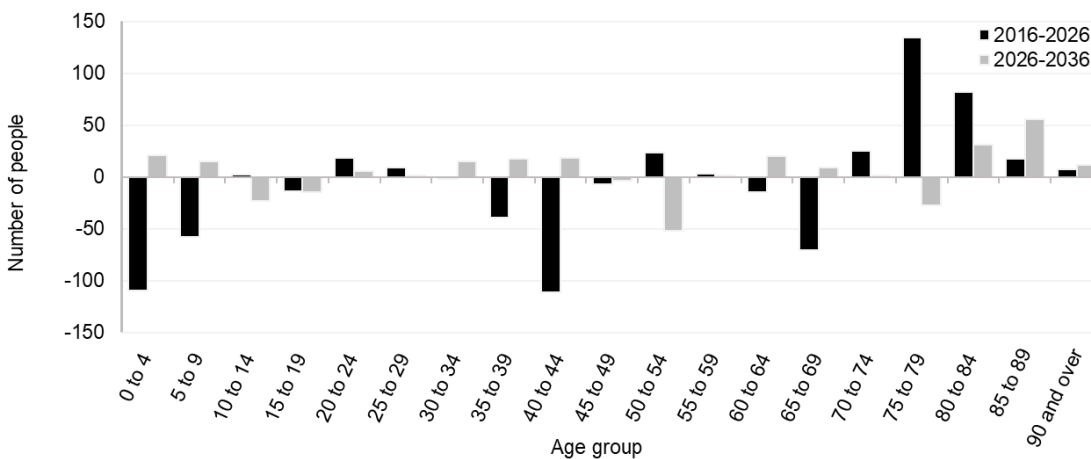
Within the Shire, there will be significant differences in age structure outcomes into the future. The dearth of growth (and new housing opportunities) will lead to significant ageing in some areas. Many of the areas that are dominated by families currently will age significantly over the next twenty years.

Areas in Hornsby Shire affected by this trend include:

- ▾ Arcadia - North Western Rural
- ▾ Berowra Heights - North Eastern Rural Balance
- ▾ Castle Hill
- ▾ Hornsby Heights
- ▾ Westleigh

Figure 18 below provides an example of this ageing process. In Berowra Heights - North Eastern Rural Balance, there is a forecast decrease in family age groups, notably 0-9 and 35-44 year olds, while a notable increase in ages 75 and over. The pattern of ageing is more notable in the 2016-2026 period compared to the 2026-2036 period. This pattern is similar in Westleigh, where a greater level of regeneration through in-migration of families is expected in the 2026-2036 period. This will offset the ageing effects between 2016 and 2026.

Figure 18. Change in population by age, Berowra Heights – North Eastern Rural Balance, 2016-2036



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

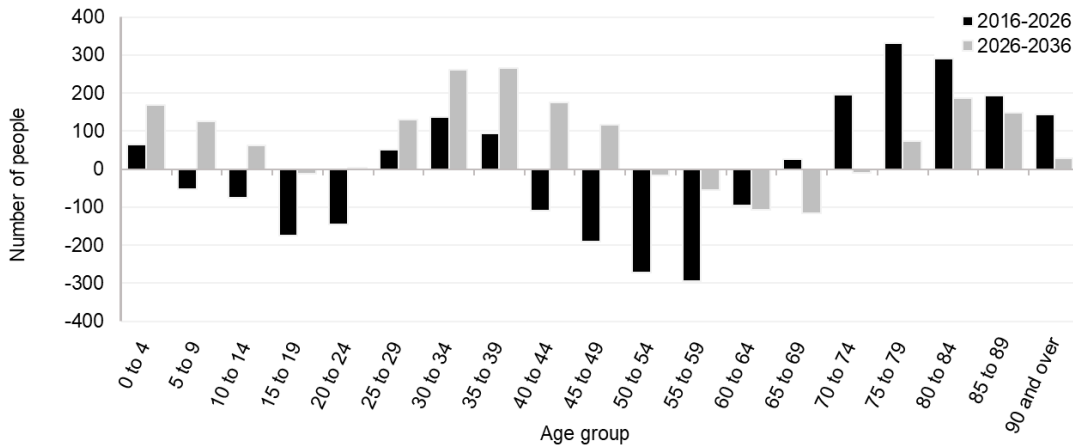
Many areas in Hornsby Shire are expected to have increases in family age groups as well as ageing. The drivers of this change are ageing in place of older adults, as well as in-migration of new families to the area. The increase in families tends to depend on how much infill development is occurring or the level of out-migration of ‘empty-nesters’. These triggers provide additional opportunities for young couples and families to get a foothold in the area. This pattern affects a number of areas including:

- ▾ Beecroft-Cheltenham
- ▾ Berowra
- ▾ Brooklyn
- ▾ Cherrybrook
- ▾ Dural
- ▾ Galston-Middle Dural
- ▾ Hornsby (non-Town Centre area)
- ▾ Normanhurst
- ▾ North Epping

The changes to population by age in Cherrybrook depicted in Figure 19 below are illustrative of changes in these areas. There is a large increase in persons aged 70 and over. There are some decreases in older adult ages (45-64 years), but increases in family ages, especially from 2026 to 2036 when the impact of development around the railway station creates more opportunities for people to move to the area. There are currently many approvals for seniors living in the rural areas, especially

Dural and Galston. It is assumed that this will not continue beyond the next 5-10 years as these areas are generally not appropriate for aged care and the local demand from within the suburb or locality does not warrant the scale and number of applications currently approved and seeking approval. However, these approvals will drive similar age changes to those occurring in Cherrybrook.

Figure 19. Change in population by age, Cherrybrook, 2016-2036



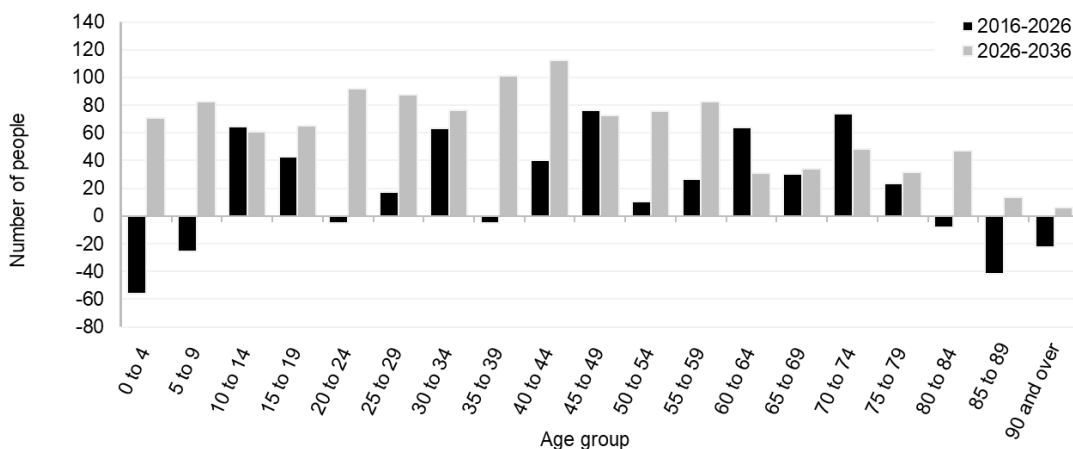
Source: .id, Hornsby Shire Forecasts (forecast.id), 2019

There are four areas where future growth by age is expected to generally follow the Shire pattern of gains in all groups. These areas include:

- ▾ Pennant Hills
- ▾ Thornleigh
- ▾ Wahroonga
- ▾ West Pennant Hills

As shown in Figure 20 below, Pennant Hills is likely to experience gains in most ages and in both ten year forecast periods.

Figure 20. Change in population by age, Pennant Hills, 2016-2036



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

It is important to note that this pattern is more pronounced during the 2016-26 period in Wahroonga, West Pennant Hills and Thornleigh. It is associated with a higher level of development in this period. Other areas are expected to be driven by migration in young-adult age groups. These areas include:

- ▣ Asquith
 - ▣ Hornsby Town Centre
- ▣ Mt Colah - Mt Kuring-gai (Mt Colah part)
 - ▣ Waitara

Waitara has experienced a long period of high-density development and Hornsby (non-Town Centre area) has a mix of dwelling types, with a large share of high-density dwellings forecast. These areas have a strong bias towards net migration gain in the young adult ages (20-34 year olds). They also attract older people looking to downsize. For areas such as Asquith and Mount Colah, a move to attract young adults is a change from their historical migration role, where family migration has predominated. Given the level of high and medium density development in all areas above, change in age structure will be more obviously driven by the age of the people attracted to the new dwelling stock, rather than ageing of the existing population of the area. See Figures 21 and 22.

Figure 21. Change in population by age, Asquith, 2016-2036

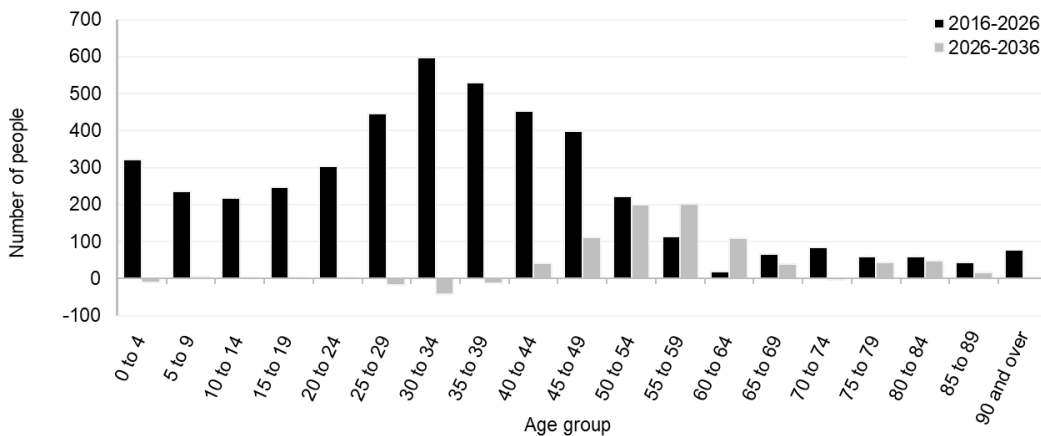
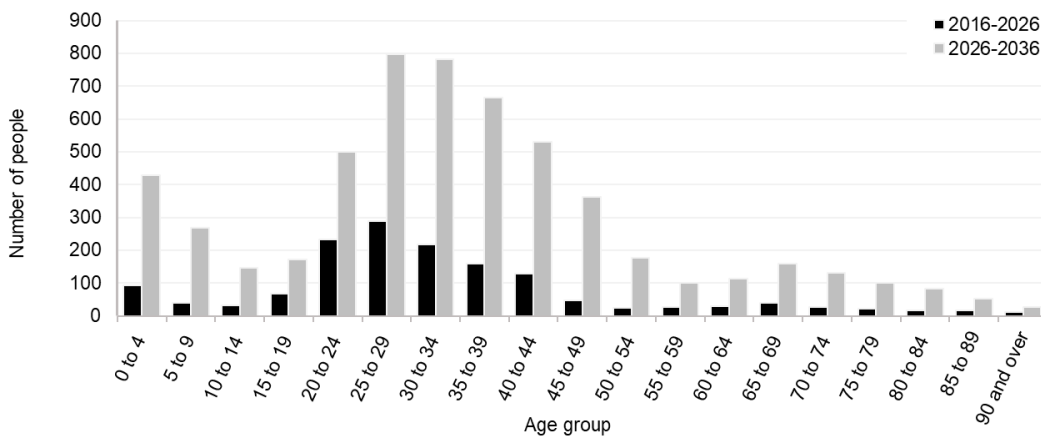


Figure 22. Change in population by age, Hornsby Town Centre, 2016-2036



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

In Asquith, changes in age structure are dominated by gains in persons aged 0-49 years. However, the gains are almost exclusively in the first ten-year period, with a greater level of ageing in the ten years to 2036. By contrast, in Hornsby Town Centre, there are gains in all age groups in both periods, especially young adults and young families (20-49 and 0-9 years). However, forecast growth in the Hornsby Town Centre is much greater in the ten years from 2026, as residential development rates increase.

Overall, the median age of Hornsby Shire is not expected to increase significantly to 2036. However, in line with changes described above, there are great differences across the Shire. See Table 8 below. Some areas are expected to increase substantially in median age, such as Waitara, but still remain lower than the Shire average. Other areas, such as Castle Hill will continue to age strongly.

Table 8. Median age, Hornsby Areas, 2006-2036

Area	2006	2016	2026	2036	Change 16-36
Castle Hill	45.2	48.9	53.6	55.2	6.3
Waitara	33.2	34.2	35.3	37.1	2.9
Wahroonga	40.4	39.2	40.6	42.1	2.9
Hornsby (non-Town Centre area)	33.9	35.4	37.1	37.9	2.5
Brooklyn	40.2	48.9	52.5	51.4	2.5
Dural	36.6	41.2	42.5	43.6	2.3
Thornleigh	36.0	37.2	37.3	38.8	1.6
Berowra Heights - North Eastern Rural Balance	36.1	39.4	40.8	40.9	1.6
North Epping	39.4	43.2	43.8	44.6	1.4
Normanhurst	38.7	39.2	39.7	40.4	1.2
Arcadia - North Western Rural	37.5	41.1	42.3	41.9	0.8
Mount Colah - Mount Kuring-gai	35.5	38.1	37.4	38.7	0.6
Pennant Hills	38.6	38.6	39.3	39.0	0.4
Hornsby Heights	36.1	38.7	39.5	39.1	0.3
West Pennant Hills	37.4	38.5	37.9	38.7	0.2
Beecroft - Cheltenham	41.8	42.4	41.8	42.4	0.0
Berowra	36.2	37.2	36.6	36.9	-0.3
Asquith	39.3	37.6	34.4	37.1	-0.5
Westleigh	38.9	42.8	43.0	42.2	-0.6
Cherrybrook	37.1	40.4	41.1	39.8	-0.6
Galston - Middle Dural	39.0	43.0	41.6	41.9	-1.1
Hornsby Town Centre	34.4	34.4	30.2	31.6	-2.9
Hornsby Shire Total	37.1	38.8	39.0	39.3	0.5

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

7. Comparison to State Government

It is important to compare these forecasts to those undertaken by State Government. Many of the policy impacts and service outcomes from the forecasts are framed by the need to meet obligations by State Government to have enough residential development opportunities to meet demand in the region and to meet key State Planning objectives.

These forecasts assume a total of 14,791 additional dwellings from 2016-2036. The State Government is assuming the Northern Sydney Region will have to provide 92,000 dwellings from 2016 to 2036. The assumptions for the Hornsby Shire forecasts would therefore represent 16.1% of the total assumed requirement. This is almost double the rate of dwelling additions that occurred in the 2006-2016 period, when dwelling growth was low and about two-thirds of the development rate from 1996-2006 when development was high. During the ten years of strong dwelling growth from 1996-2006, there was still some greenfield development occurring, most notably in Cherrybrook and Castle Hill. High density development in Waitara was also prominent in the 2001 to 2006 period. See Table 9 below.

Table 9. Historical dwelling additions, Northern Sydney Councils, 1991-2016⁴

LGA	1996-01	2001-06	2006-11	2011-16	2016-2019
Hornsby Shire	3,282	3,443	1,198	1,598	4,254
Hunters Hill	271	289	122	170	142
Ku-ring-gai	558	640	3,530	2,805	3,964
Lane Cove	299	218	218	2,264	2,313
North Sydney	2,066	1,594	1,083	1,891	2,239
Ryde	1,574	1,162	1,759	4,489	8,765
Willoughby	2,410	2,581	875	1,972	1,071
Mosman	502	-40	297	332	179
Northern Beaches	3,075	4,022	3,507	3,901	3,689
Total Northern Sydney	14,037	13,909	12,589	19,422	26,616
Greater Sydney	116,848	97,639	79,532	135,569	190,741
Hornsby Shire % of Northern Sydney	23.4%	24.8%	9.5%	8.2%	16.0%
Northern Sydney % of Greater Sydney	12.0%	14.2%	15.8%	14.3%	14.0%

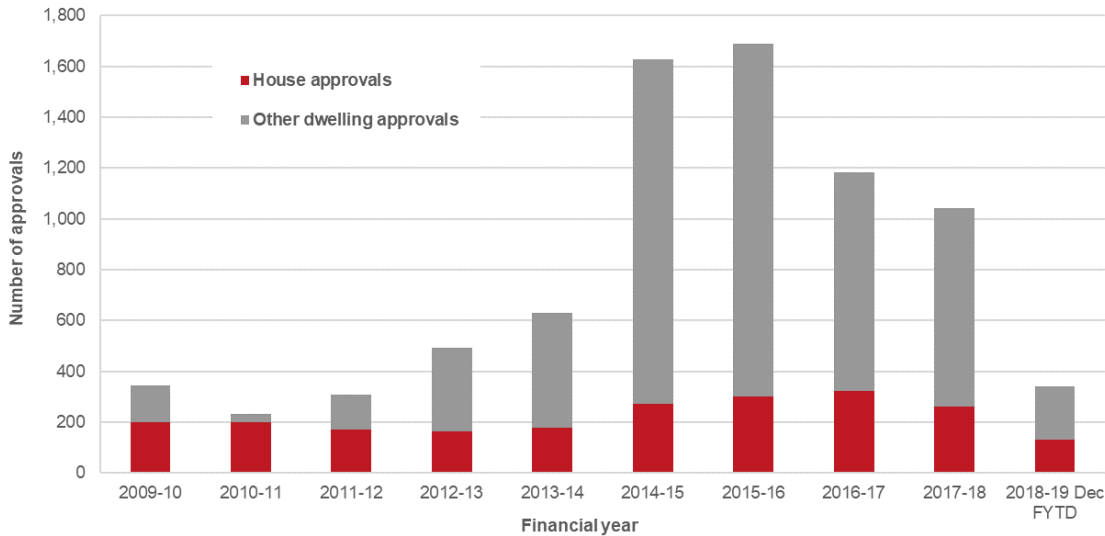
Source: ABS, *Census of Population and Housing*; ABS, *Building Approvals, Australia*

With the finalisation of the 2011 Hornsby Shire Housing Strategy, new areas were identified for high and medium-density development and approvals rose steeply, especially in 2014-15 and 2015-16. This is reflected in Table 9 and Figure 23. Although a small number of approvals from 2014-2016 were

⁴ 2016-19 data based on building approvals from July 2015 to December 2018 (3.5 years), using a 12-month lag

completed prior to the 2016 Census, many have been built during 2017-2019, leading to a spike in dwelling additions. The number of approvals has fallen notably since the peak of 2014-2016.

Figure 23. Building approvals, Hornsby Shire, 2009-2019



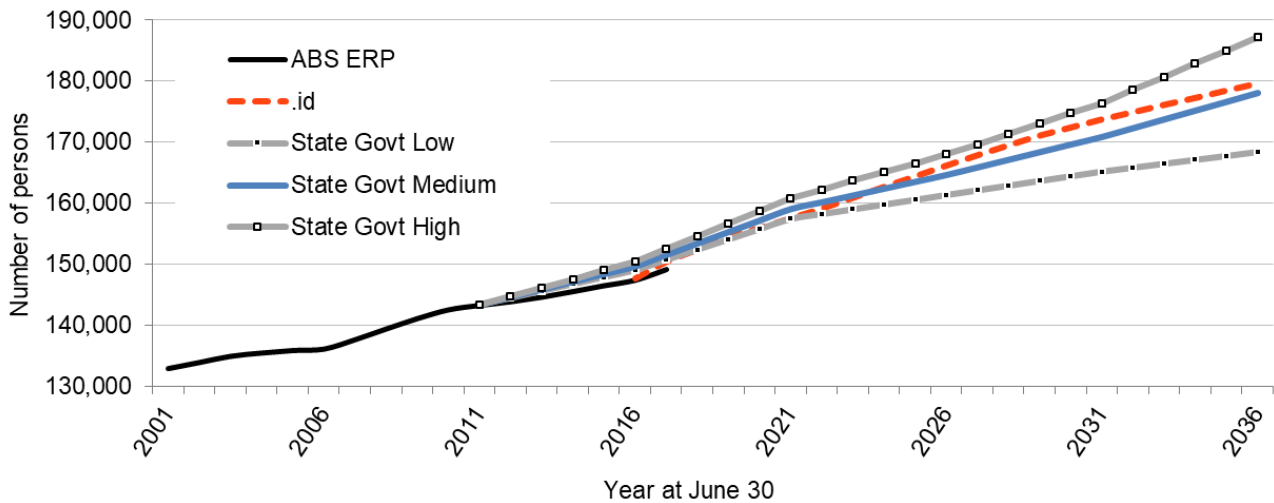
Source: ABS, *Building Approvals, Australia*

However, the approvals appear to overstate the actual level of development. Detailed data from Council suggests the actual net gain from 2016-2019 is about 3,060 dwellings. This compares to more than 3,900 approvals from 2015 onwards (assuming a 12-month lag to completion). There are a number of complications to these approval data. They include the level of demolitions associated with approvals and some sites which have development consent have not yet proceeded, although the forecasts assume that they will all be constructed in the next few years. The forecasts assume a net gain of 4,459 dwellings from 2016-2021, which exceeds the 0-5 year supply target from the North District Plan of 4,350 dwellings.

In terms of total population change to 2036, these forecasts are slightly higher than the State Government medium growth scenario, although the timing of growth is different. The growth assumed by .id is set to slow from the late 2020s, as many of the readily developable medium and high-density areas are utilised. By contrast, the State Government has more growth in the short term⁵, before slowing from 2021-2031, after which time growth is assumed to again speed up. It is possible that the development assumptions underpinning the State forecasts did not anticipate the speed of the response by the development industry to the 2011 Housing Strategy rezonings. See Figure 24 below.

⁵ The State Government forecasts also start from a higher point in 2016, as the numbers have not been rebased to 2016 Census-based ERPs

Figure 24. Population forecast comparison, Hornsby Shire



Source: ABS, *Regional Population Growth, Australia*; *id, Hornsby Shire Forecasts (forecast.id), 2019*; Department of Planning and Environment, *2016 NSW population and household projections*.

The differences in assumptions between the .id and State Government forecasts (medium growth scenario) are detailed in Table 10. The .id forecasts feature higher levels of dwelling growth than the State Government, although the 2016 base figure from State Government is much higher. This is likely to relate to the dwelling approvals from 2014-16. The growth in households follow the growth in dwellings, suggesting similar assumptions about vacancy rates.

Table 10. Comparison in forecast assumptions / outcomes, Hornsby Shire⁶

DWELLINGS	2016	2021	2026	2031	2036
Dwellings – State Govt	55,100	60,050	62,700	65,850	68,650
Dwellings – .id	51,753	56,212	59,970	63,548	66,544
Difference	3,347	3,838	2,730	2,302	2,106
HOUSEHOLDS	2016	2021	2026	2031	2036
Households – State Govt	52,100	56,750	59,300	62,300	64,950
Households – .id	49,864	54,073	57,732	61,181	64,074
Difference	2,236	2,677	1,568	1,119	876
AVERAGE HHOLD SIZE	2016	2021	2026	2031	2036
Household size – State Govt	2.80	2.75	2.70	2.66	2.60
Household size – .id	2.91	2.87	2.83	2.79	2.76
Difference	-0.11	-0.12	-0.13	-0.13	-0.16

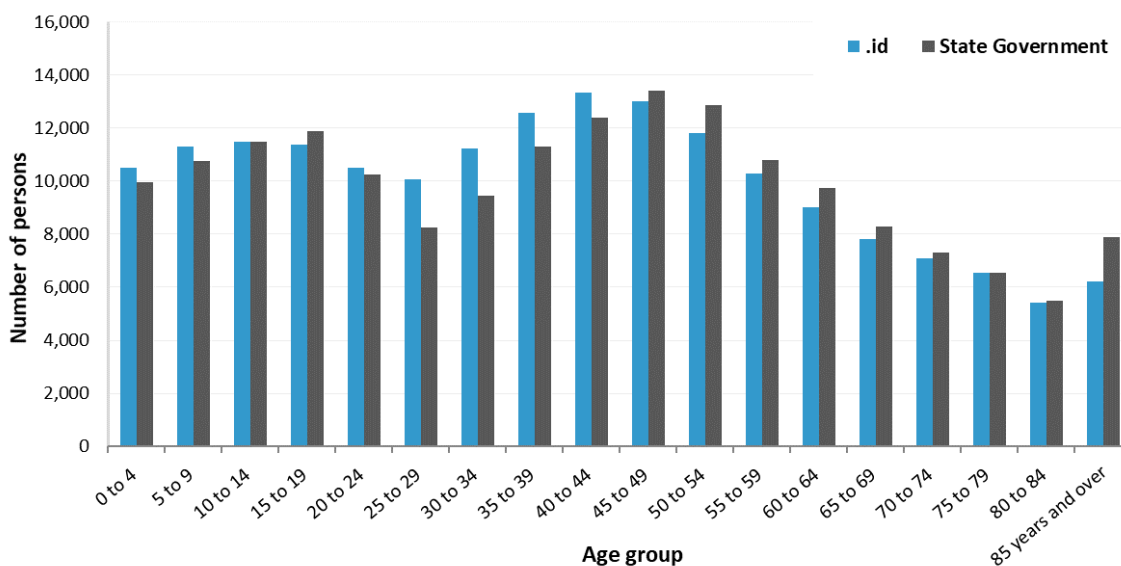
Source: .id, *Hornsby Shire Forecasts (forecast.id), 2019*; Department of Planning and Environment, *2016 NSW population and household projections*.

⁶ State Government forecasts are based on the medium growth scenario

The State Government forecasts assume a greater fall in average household size than .id forecasts. There has been an increase in average household size in Hornsby from 2006-2016, like many parts of Sydney. The increase in average household size was driven by the housing shortage, especially from the mid-2000s, with population growth far exceeding dwelling production. This led to housing pressures, with more people in fewer dwellings. It is assumed that there will be a fall in household size now that the housing shortage has seemingly been addressed. This is reflected in the drop in median house prices over the last 1-2 years in Sydney.

The level of decrease in the .id forecasts is influenced by the future age structure. Older persons are more likely to live in small households. As Figure 25 below shows, the age structure in 2036 is considerably younger in the .id forecasts than those from State Government. This is most likely due to migration assumptions, where .id has a greater gain of younger adults and a larger loss of retirees. The difference in ages 85 and over may relate to death rates, with a higher death rate in the State Government forecasts.

Figure 25. Forecast age structure comparison, Hornsby Shire, 2036⁷



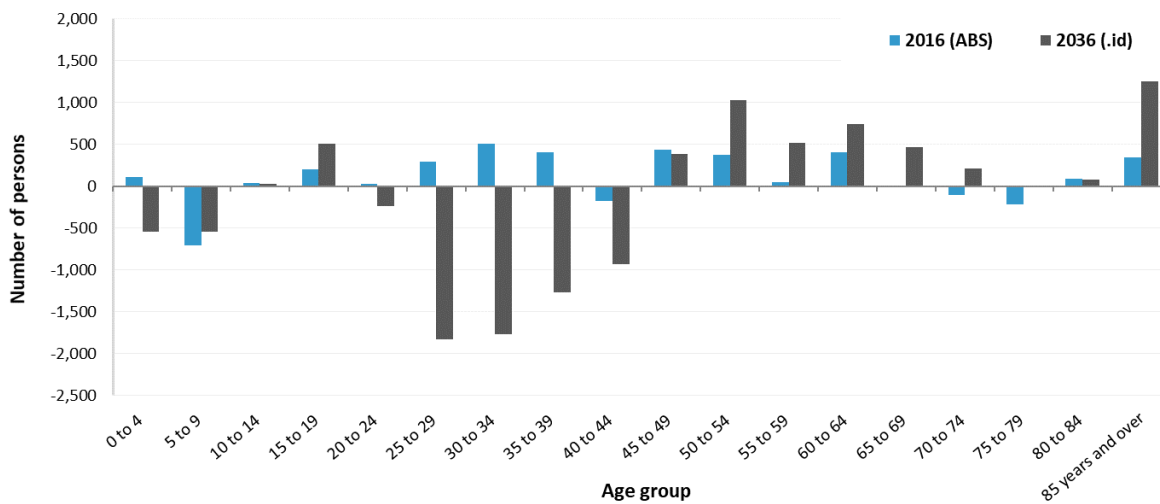
Source: .id, Hornsby Shire Forecasts (forecast.id), 2019; Department of Planning and Environment, 2016 NSW population and household projections.

Part of the difference in the forecasts relates to the differences between the forecasts in the 2016 base year. As Figure 26 below indicates, there is already a variation in the forecasts in many age groups in 2016, with State Government higher in most age groups compared to the ABS estimates. This difference is carried through to 2036 when compared to the .id forecasts, especially in the population

⁷ State Government forecasts are based on the medium growth scenario

aged 85 and over and 45-64 years. However, the State Government figures are significantly lower than .id figures in the young and mature adult ages 20-44 years. This may relate to the .id forecasts assuming a higher share of young adults compared to previous forecast periods, with the shift of development from areas that typically attract families to high density development, especially in Hornsby Town Centre, which is more likely to attract young adults.

Figure 26. Difference in population by age, State Government forecasts, Hornsby Shire, 2016 and 2036 ⁸



Source: ABS, Regional Population Australia (Cat. No. 3218.0), .id, Hornsby Shire Forecasts, 2019; Department of Planning and Environment, 2016 NSW population and household projections.

⁸ State Government forecasts are based on the medium growth scenario

8. Impact of forecasts on land use planning and services

a) Meeting Council's obligations to provide enough housing

One of the important planning policy questions that emerges from the forecasts is whether the Shire meets the State Government's dwelling target. The previous chapter highlighted the fact that the .id population forecasts for the Shire are above the medium growth scenario by the State Government. The chapter also highlighted the fact that the five-year target of 4,350 dwellings between 2016 and 2021 was going to be met and exceeded by Hornsby Shire. The remaining target for the next fifteen years is currently unknown. The .id forecasts assume almost 14,800 additional dwellings to 2036 or 16.1% of required Northern Sydney capacity. An analysis of .id forecasts for other Councils in the Northern District highlights the likelihood of these numbers (and therefore the planning framework) being sufficient to meet the housing target for Northern Sydney. See Table 11 below.

Table 11. Forecast dwellings, .id forecasts 2016-36, Northern Sydney LGAs vs North District Housing Targets⁹

LGA	2016-2036
Hornsby	14,879
Hunters Hill	1,360
Ku-ring-gai	9,708
Lane Cove	6,808
North Sydney	6,535
Ryde	20,191
Willoughby	6,758
Mosman	1,033
Northern Beaches	19,137
Total Northern Sydney	86,409
Required Northern Sydney	92,000
Net difference	-5,591

Source: .id, Hornsby Shire Forecasts (forecast.id), 2019; .id (SAFi) NSW, 2018; Greater Sydney Commission, 2018 Our Greater Sydney 2056- North District Plan – connecting communities

The table suggests that the North District Councils are well on track to meet their 2036 targets with a 6% deficiency identified (-5,590 dwellings or about 6.1%). Although there is a gap of almost 5,600

⁹ Assumptions based on forecast.id, with Hunters Hill, Ku-ring-gai and Lane Cove from .id SAFi

dwellings, it is likely that additional residential opportunities, not yet identified in forecast.id, will be identified in the future. Indeed, in the short term, all Councils are performing well to meet their short-term targets. As Table 12 below indicates, the region is exceeding its target based on three and a half years of approvals (lagged by twelve month) and Hornsby is almost at 100% during this period.

Table 12. North District Housing Targets vs Dwelling approvals, Northern Sydney LGAs, 2016-2021

LGA	Draft GSRP target 2016-2021	Dwelling approvals Jul 2015-Dec-2018	% 2016-2021 target already approved
Hornsby	4,350	4,254	97.8%
Hunters Hill	150	142	94.7%
Ku-ring-gai	4,000	3,964	99.1%
Lane Cove	1,900	2,313	121.7%
Mosman	300	179	59.7%
North Sydney	3,000	2,239	74.6%
Northern Beaches	3,400	3,689	108.5%
Ryde	7,600	8,765	115.3%
Willoughby	1,250	1,071	85.7%
Total Northern Sydney	25,950	26,616	102.6%

Source: Greater Sydney Commission, 2018 *Our Greater Sydney 2056- North District Plan – connecting communities*; ABS, *Building Approvals, Australia*

Assuming the .id forecasts include a relatively accurate assessment of development potential, Hornsby Shire is on track to have the third largest share of development from 2016-2036, only behind Ryde and Northern Beaches Councils. In terms of identifying additional housing options, however, Hornsby may come under greater pressure than other Councils to find extra capacity. This is because of two factors. One is the 'heavy-lifting' that other Councils have engaged in over the past decade, most notably Ryde and Ku-ring-gai. The other is that Councils may struggle to identify further appropriate centres for development, while Hornsby Shire is favoured by good access to the rail network. This will be improved further with the opening of Cherrybrook Station on Sydney Metro Northwest in a few months' time.

b) Forecasts feed policy which feed forecasts – the causality dilemma

The cyclical nature of policy and forecasts is always a challenge. Hornsby Shire has not undertaken local area forecasts for many years, which makes it harder for Council to understand the demographic consequences of planning decisions at the local or suburb level. Council is currently reviewing planning policy in a range of areas as part of the Accelerated LEP Review process. In turn, there are a range of

State Government policies that have and are likely to continue to have an impact on Hornsby Shire, such as the granny flat / secondary dwelling policy.

These changes include State Environmental Planning Policy 70 provisions which allows Councils to levy for affordable housing. This is not in place in Hornsby Shire yet, but it could be adopted as part of the LEP review. Another consideration could be the adoption of State Government low-rise, medium-density provisions. Council has requested an exemption from this policy and has received a temporary deferment. The outcomes of this policy, should it apply to Hornsby Shire, would serve as a potential prompt for a review of the population forecasts.

The State Government is also reviewing its population projections which might change significantly and ask Councils to play a larger or smaller role in housing Sydney-siders into the future. Should Council respond to either of these considerations or choose to make further adjustments to the planning framework or zoning, the forecasts would need to be reviewed again. This also has potential effects on the level of residential development that Hornsby Shire is expected to accommodate.

c) Impact on housing diversity and affordability

Hornsby Shire has developed a specific role in the broader Sydney housing market, attracting predominantly families, as well as the elderly. The reasons why Hornsby Shire has had this role relates to several factors. These include:

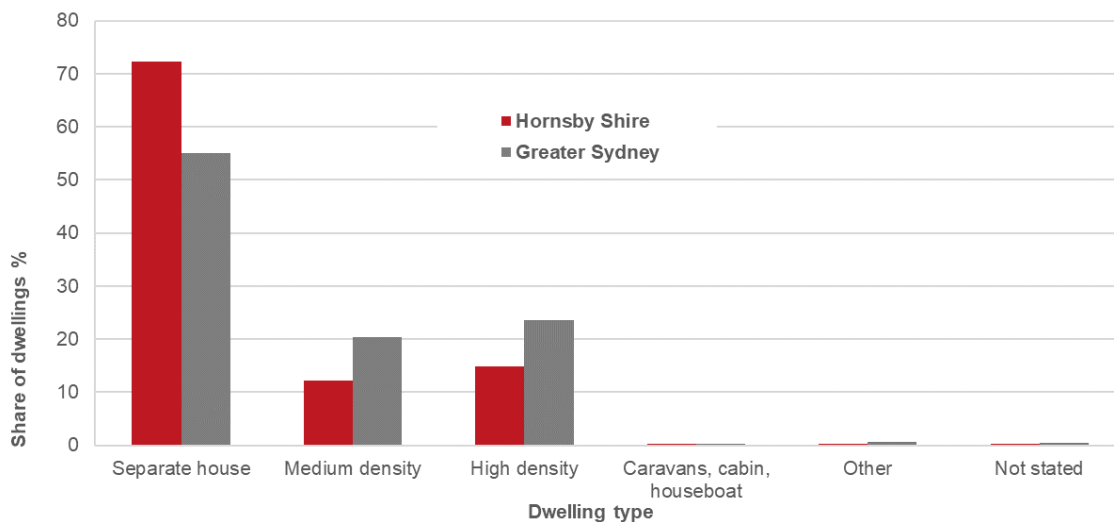
- ▣ The historically higher socio-economic status of the northern suburbs of Sydney
- ▣ High natural amenity of Hornsby Shire
- ▣ Good access to services, especially secondary education
- ▣ Excellent heavy rail connectivity to employment in the City and major northern suburban employment nodes
- ▣ Predominance of larger lot residential development, with minimum lot sizes
 - ▣ Development of large-scale seniors housing and aged care (such as the Anglican Retirement Village in Castle Hill and the Catholic Healthcare facility (McQuoin Park) in Wahroonga and Waitara)

Some of these factors are unlikely to change and most of which would be perceived as a benefit to the Shire, but it may be a challenge to housing affordability and the provision of more housing options for

residents. The two key demographic groups where the Shire loses persons in net terms is young adult ages and retirees. These are clearly an area that a housing diversity policy could address. However, greater housing choice can also provide options for existing residents who wish to change their housing type, especially if their own circumstances change.

In terms of housing diversity, Hornsby Shire has a lower share of medium and high-density housing than the Sydney average. This is not especially surprising, given the Shire is comparatively further from the centre of Sydney and the Shire has been mainly family-oriented housing. See Figure 27 below.

Figure 27. Dwelling structure, Hornsby Shire and Greater Sydney, 2016



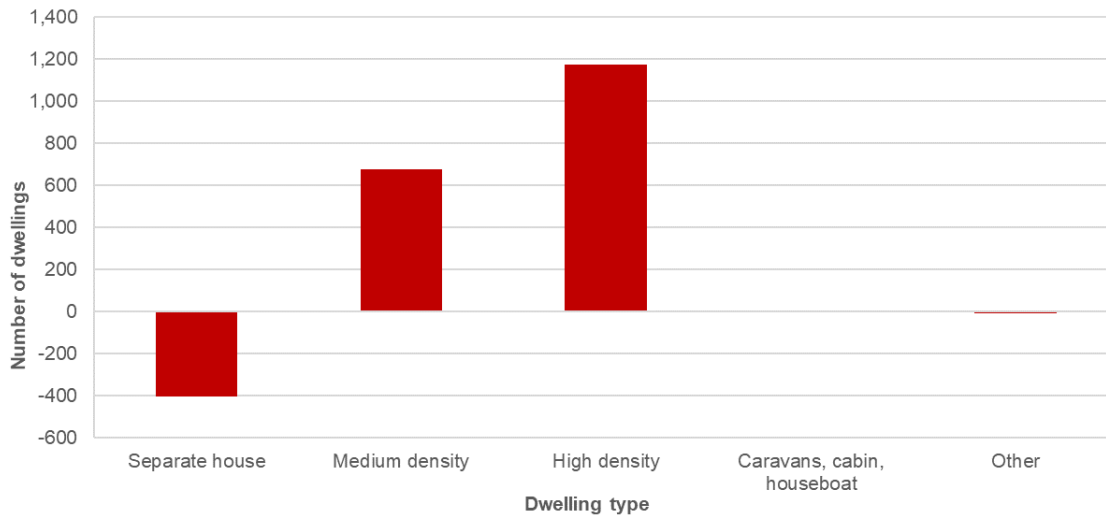
Source: ABS, Census of Population and Housing

However, over the last couple of decades, additional housing has occurred in the Shire through several means. Progressive, piecemeal development in the suburbs through units, townhouses and secondary dwellings is maintaining options for young and mature families. Medium and high-density apartments provide housing choice for those seeking to get a foot in the door of the Hornsby housing market or as an option for downsizing or reducing property maintenance concerns. However, the change in housing from 2011-16 showing a decrease in separate (detached) houses may be a concern to some in the Shire who feel the traditional housing market role is being overwhelmed by the push for higher densities. See Figure 28 below. The move to focus future residential development in the commercial areas of the Hornsby Town Centre and better use of underutilised non-residential land in these areas should slow or stop the decrease in separate (detached) houses.

The other source of housing choice which may yet provide the greatest affordability is through granny flats (secondary dwellings). These dwellings are often built at a fraction of the cost of the larger scale apartments and may provide affordable housing in desirable areas. They are also a potential source of

income for an ageing cohort of home-owners seeking to capitalise on their valuable real estate. This may also allow them to stay in the family home for longer without the need to cash in their asset.

Figure 28. Change in dwelling structure, Hornsby Shire, 2011-2016



Source: ABS, *Census of Population and Housing*

Affordable housing has been identified by State Government as one of its key objectives and Hornsby Shire has shown a keen interest to explore its role in facilitating affordable and appropriate housing for all. Council has recently exhibited an *Affordable Housing Discussion Paper* which tackles a number of these issues. Chapter 3.1 cites a series of reasons for households to require more affordable housing from a study by the New South Wales Centre for Affordable Housing. These include¹⁰:

- ▣ A resident retires and needs smaller and more affordable housing that is not available in their community;
- ▣ A resident loses their spouse or partner and can no longer afford the rent on the family home;
- ▣ Adult children in a local family require independent housing;
- ▣ Working households want to start a family but will lose some of their earning potential and capacity to pay for their housing;
- ▣ The capacity of a family to pay for their existing housing is reduced through long term illness or disability;
- ▣ A lower paid worker obtains employment in the local area but cannot afford to live there; or
- ▣ A key worker such as a police officer, a nurse or a child care worker is just starting out in their career

¹⁰ Hornsby Shire: Affordable Housing Discussion Paper, September 2018

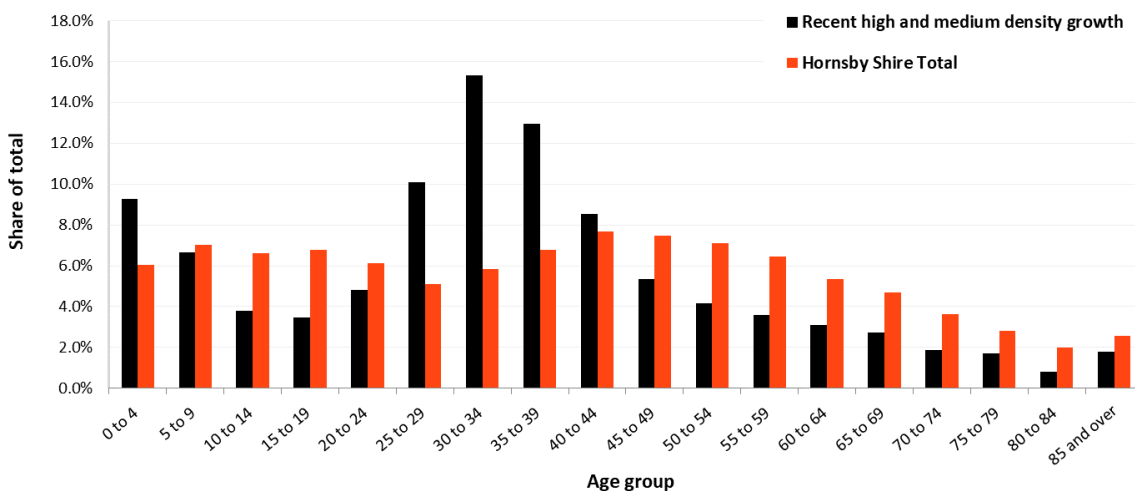
In addition, there will be reasons such as:

- ▣ The family home is the principal asset and residents may be lacking in superannuation, which provides an incentive to sell the family home to provide a nest egg / additional income;
- ▣ The cost and / or labour of home maintenance exceeds its usefulness; or
- ▣ Housing costs do not provide enough disposable income

The loss of retirees may be inevitable in a general sense because of the huge potential for capital gains to be made by property owners, but it is possible to provide more choice and to offer more price points for both purchasers and renters to stay in the local area. The Australian Government has introduced ‘downsizer’ measures to promote the sale of larger dwellings held by retirees and older Australians. It allows people to sell their property with the option of boosting their superannuation by \$300,000 with no tax implications, as well as making a capital gain. However, without affordable, appropriate local housing, this will not reduce the incentive to migrate to more affordable markets, such as the Central Coast. Of course, the cost of moving and selling property remains a major disincentive to downsize.

Much of the push for housing diversity is driven by desire to provide choice for older residents. This has been a focus for Hornsby, given its ageing profile over the past ten years. It is true that a high percentage of the older persons reside in either medium and high-density housing or institutional accommodation. However, as Figure 29 below indicates, the share of young adults and young families is much higher in recent medium and high-density areas, indicating their attractiveness to young renters and buyers who can utilise the excellent access to rail transport.

Figure 29. Age structure of recent medium and high-density areas versus Hornsby Shire age structure, 2016¹¹

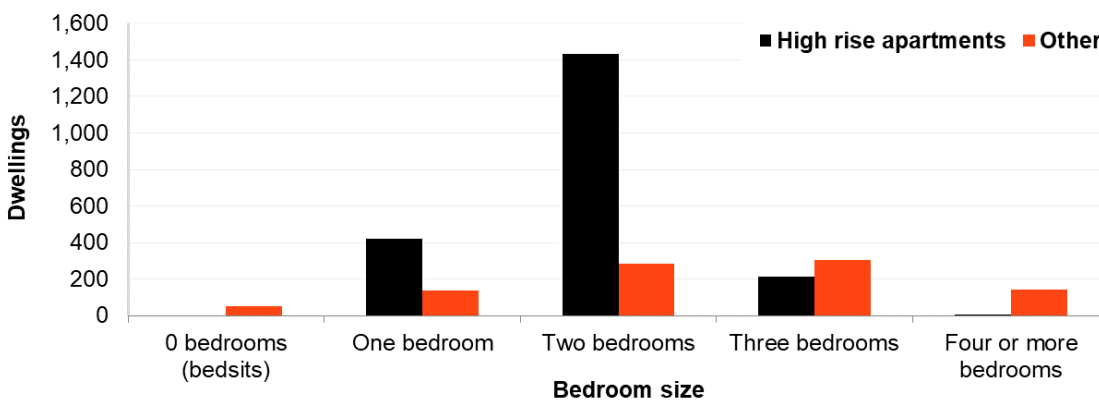


Source: ABS, Regional Population Growth (SA1 unpublished data)

¹¹ Based on areas in Waitara, Hornsby, Asquith and Thornleigh (Population 7,500 in total as at 2016)

A further assessment of these areas with recent high and medium density development suggests that the format of the units has not been especially diverse or affordable. As Figure 30 below indicates, the bulk of the units constructed in four or more storey apartment buildings has been concentrated in two-bedroom format (69.1%). Perhaps unsurprisingly given the nature of higher density units, the share of four or more-bedroom apartments is very low, but the share of one and three-bedroom apartments is much lower than would be expected and there are no bed-sits at all. The zero and one-bedroom formats would be expected to be the most affordable.

Figure 30. Dwelling type by bedroom size, recent medium and high-density areas, 2016¹²



Source: ABS, Census of Population and Housing

The impact of the format of these dwellings can be seen in the weekly rental payments in the recently developed medium and high-density areas. There are few low-cost apartments and few high-cost apartments in line with the prevailing dwelling stock of the area. When compared to all high density dwellings in the Shire, there was a higher share of renters paying both \$450-\$549 and \$550-\$649, suggesting these dwellings are not especially affordable. See Figure 31 below.

Figure 31. Rental payment by selected areas in Hornsby Shire, 2016



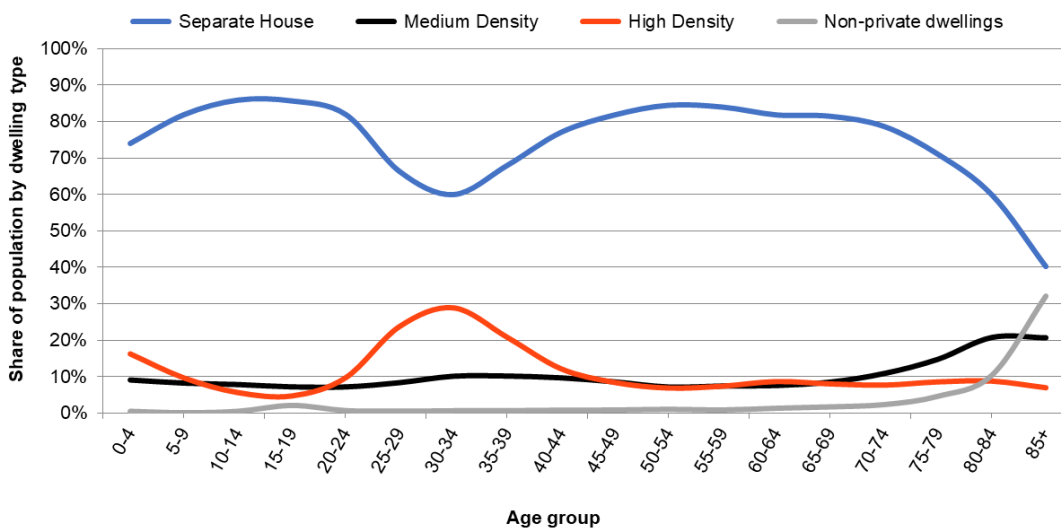
Source: ABS, Census of Population and Housing

¹² High rise apartments are defined as apartment block of four storeys or more

Future housing provision within the Hornsby Town Centre and on Government land in Cherrybrook is more likely to be at the affordable end. It is likely that these developments will contain a larger share of one-bedroom apartments compared to places such as Waitara and Asquith. The higher and medium density areas have promoted a greater level of diversity in housing and acted as a means to retain and attract young adults, but these dwellings do not necessarily appeal to an ageing population.

The need to provide lower maintenance, medium density dwellings may be key to providing for older people looking to ‘downsize’. There is already evidence that older people in Hornsby Shire are less likely to be living in separate (detached) houses as they age. As Figure 32 below indicates, medium density dwellings and non-private dwellings are increasingly important in the housing mix for Hornsby residents, especially for those aged 70 and over. The share of medium density dwellings is partly limited by the comparative lack of this dwelling type in the Shire. By comparison, high density dwellings tend to have a much higher share of the population aged 25-34 years in Hornsby, although there is a consistent share of just under 10% in most ages from 40 onwards. Non-private dwellings are institutional dwelling types, which include hostel and nursing home beds, but not retirement units. The aged care impacts are further explored in the sub-section below.

Figure 32. Share of Hornsby Shire population by age in dwelling types, 2016¹³



Source: ABS, Census of Population and Housing

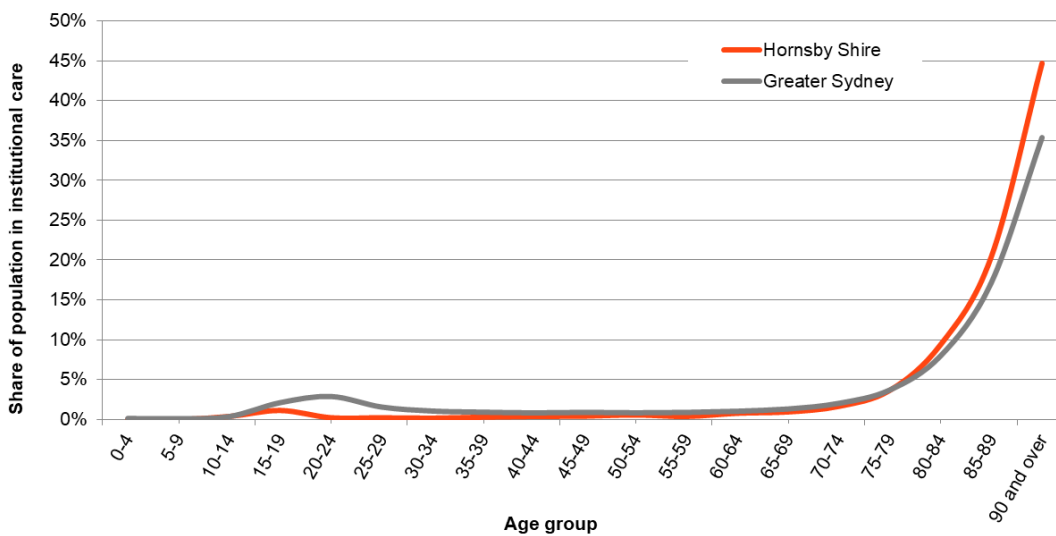
¹³ High rise apartments are defined as apartment block of four storeys or more. Medium density is defined as attached dwellings and one to three storey apartments. Non-private dwellings are institutional residential care and include nursing homes and hostel beds.

d) Impact on residential aged care and seniors living

Role of Aged care in Hornsby Shire

Hornsby Shire plays an important role as an aged care provider for the northern suburbs of Sydney. It currently provides adequately for the Shire’s needs as well as providing capacity for older persons in the surrounding areas. The share of population in older ages living in non-private dwellings (residential aged care) is notably higher than the metropolitan average. This indicates that the Shire attracts people from neighbouring areas to its residential aged care services. See Figure 33 below for reference.

Figure 33. Share of Hornsby Shire population in non-private dwellings, 2016



Source: ABS, Census of Population and Housing

As at 2016, Hornsby Shire had an estimated 1,858 persons aged 70 and above in aged care. Funding for residential aged care in 2016 is based on 79.7 residential beds per 1,000 population aged 70 and above¹⁴. This means that residential beds in Hornsby Shire are funded to an equivalent of 143% of ‘normal’ Commonwealth funding. Overall Commonwealth funding across Australia for residential aged care has been declining as a share of elderly persons, with more funding dedicated to ‘in-home’ care packages, meals on wheels and respite care. By 2022, the Government expects to fund at 78 beds per 1,000 persons aged 70 and above¹⁵. It is assumed in .id forecasts that the funding will continue to fall to approximately 75 beds per 1,000 population by 2036. As Table 13 below highlights, the share of persons aged 70 and above is increasingly strong from 2016 to 2036, meaning demand for residential care is continuing to grow within the Shire. This pattern is also expected in neighbouring LGAs.

¹⁴ Commonwealth Government funding was originally based on 100 beds per 1,000 population aged 70 and above, but the residential care component has and will continue to be cut in favour of more support to keep people in the family home.

¹⁵ Source: Australian Government, Aged Care Financing Authority, Sixth report on the Funding and Financing of the Aged Care Sector July 2018

Table 13. Historical and assumed population 70+ in residential aged care, Hornsby Shire, 2006-2036

Aged care components	2006	2011	2016	2021	2026	2031	2036
Population 70+	12,848	14,428	16,279	19,159	21,806	23,841	25,279
Commonwealth Funding (Beds per 1,000 70+ pop)	86	85.8	79.7	79	77.6	76.3	75
'Normal' Commonwealth Funding (no. beds)	1,105	1,238	1,297	1,514	1,692	1,819	1,896
Hornsby Shire residents aged 70+ in aged care	1,952	2,144	1,858	2,157	2,537	2,537	2,537
Hornsby Funding ratio (based on normal funding)	177%	173%	143%	143%	150%	139%	134%

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

The main suburbs of Hornsby Shire that contain aged care are Castle Hill, where the Anglican Retirement Village has a major bearing on the overall age structure of the area. However, other places such as Wahroonga and Normanhurst also feature large aged care facilities. In addition, there are significant recent developments and a range of proposed developments. These include:

- Greenwood Aged Care 9 Hinemoa Ave, Normanhurst – 107 beds opened in 2015-16
- Wahroonga Nursing Home: 33 Pacific Hwy, Wahroonga – 125 beds opened in 2016-17;
- McQuoin Park redevelopment – 35 Pacific Hwy, Wahroonga – Demolition and rebuild, 122 beds opened in 2017-18 (future development includes independent living units)
- Ashleigh Lodge: 3 Hillmont Ave, Thornleigh – Extension to 67 beds opening in 2016-17
- 705-717 Old Northern Rd, Dural – 153 approved beds assumed to open in 2021-22 (approval includes independent living units)
- 589-593 and 599-607 Old Northern Rd, Dural – 79 approved beds assumed to open in 2023-24 (approval includes independent living units)
- 461-473 Pacific Hwy Seniors Living, Mount Colah – 102 approved beds assumed to open in 2024-25 (approval includes independent living units)

Beyond, these approvals, the forecasts assume no increase in residential aged care. This means that based on the current assumptions in the forecasts, 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 further expansions are assumed.

Future role for seniors housing

The advanced role that the Shire has played in seniors housing and residential aged care is contingent upon the policy environment of Council, the pressure from applicants to develop residential aged care and the degree to which the State will intervene in approving seniors living and aged care in the rural areas of the Shire.

There are several pending applications for seniors living and aged care in the rural areas of the Shire, especially in the locality of Dural, generally on the Old Northern and New Line Roads. These developments in the rural areas are seeking Site Compatibility Certificates from the State Government. All these approvals in the rural areas have been rejected by Council and have not been assumed in the forecasts, but ultimately, may be approved. Objectively, these areas are not appropriate for this type of development as the facilities are isolated from services and access to transport and retail opportunities. It also changes the nature of the built-form of these areas from uniformly rural, sparsely developed areas to having uncoordinated and ad hoc residential densities, including medium and higher density 3-4 storey housing, surrounded by farmland.

It may be more appropriate to find well-located precincts or areas in the more established urban areas of the Shire to take pressure off the speculative approvals in the rural areas and the small-scale seniors living developments (8-15 units) so common in places, such as Beecroft. Council should be encouraging its older residents to maintain an independent and active lifestyle, so proximity to services is essential. A pro-active approach to supporting aged care in specific locations in the Shire may give Council a greater ability to reject residential care in isolated or locations with lower levels of accessibility.

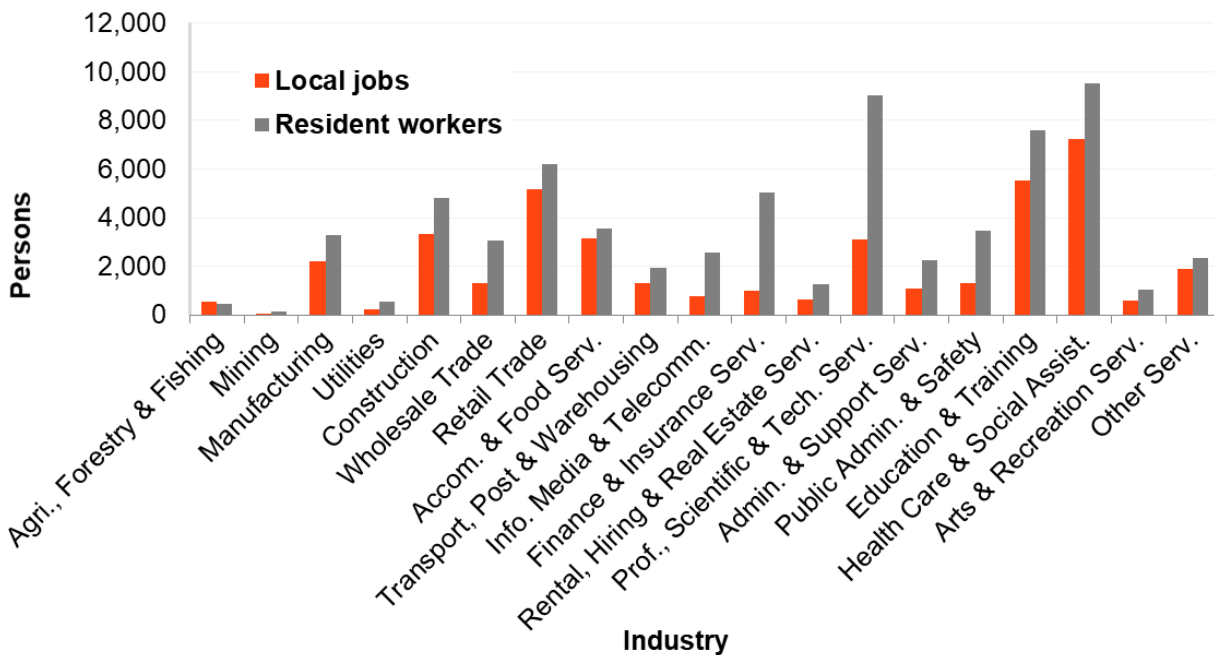
e) Impact on employment

The impact of the population forecasts in generating local employment growth are twofold. There is the general increase in local employment which occurs as a result of a growing population to 2036 (e.g. retail, health and education). The other increase relates to the potential of growth in major centres, especially the Hornsby Town Centre.

The increasing number of people in Hornsby Shire will drive increases in population-based services such as retail, commercial, as well as education and health care. Hornsby Shire has a relatively low level of employment self-containment, with a large share of the residential population (67.8%) leaving the LGA for work. Although the Shire has a comparatively small employment base, about 48% of jobs (or 20,090 jobs) undertaken in the Shire in 2016 were occupied by Hornsby Shire residents.

This means that increasing employment in the Shire will have obvious benefits for local residents. One of the reasons that many Shire residents leave the area for work is the significant mis-match between the skills and education of the residents, compared to type of work available in the LGA. As Figure 34 demonstrates, there are major differences in industry types between local jobs and workers.

Figure 34. Resident workers and local employment, Hornsby Shire, 2016



Source: ABS, Census of Population and Housing

A number of industries that tend to have highly skilled and well-paid workers are under-represented in Hornsby, relative to the residents that work in these industries. The most notable of these include Professional, Scientific and Technical Services, as well as Financial and Insurance Services. It will not be easy for the Shire to address this imbalance in the short-term, with well-established centres of employment to the south along the Pacific Highway corridor and a large share of resident workers employed in the CBD, the City of Parramatta and The Hills Shire.

However, with the focus of residential development likely to shift to the Hornsby Town Centre over time, there is an opportunity to attract greater investment in employment and attract State Government funding. As the Shire has positioned itself historically as a moderate growth LGA, it is harder to compete with other faster-growing areas, such as the LGAs of Parramatta, The Hills or Ryde. By elevating Hornsby Town Centre as a population growth centre, there is the possibility of gaining attention from private and public agencies and successfully competing with the larger centres in Northern Sydney, such as Chatswood and Macquarie Park, for infrastructure upgrades and investment.

The population growth and greater densities around centres such as Asquith, Mount Colah, Thornleigh, Cherrybrook and Pennant Hills may also provide an opportunity to boost local services, such as retail, cafes and health services. While many of the new residents will be commuters, the greater densities, especially around the railway stations, will promote a wider and better selection of services and

promote opportunities for local employment and business growth. The main focus of the Sydney Metro Northwest project has been on improving connections into the CBD and using the connections as a funnel to move people from dormitory suburban areas toward the centre. However, it could provide opportunities to create a work and cultural destination in Cherrybrook around this new infrastructure.

The goal for Hornsby Town Centre and other centres is to move away from transit-oriented growth to more knowledge orientated development, where businesses and residents both benefit from the agglomeration of housing and employment around hubs. Hornsby Shire has a highly educated and skilled population, so there is an opportunity to bring local people together and harness their entrepreneurial capital to create new business ventures and boost local jobs. It can also increase the viability of public transport connections by balancing the morning and evening peak-flows.

While these forecasts do not anticipate major land use changes in important employment corridors such as the Pacific Highway in Hornsby and Waitara, these areas are currently subject to interest from developers to rezone for residential purposes. With residential development expected to focus in the Hornsby Town Centre, it will be a balancing act, especially in the longer term, to ensure that office and retail space and employment growth is not undermined by continued apartment expansion.

f) Impact on planning for social and community facilities

There are a number of impacts on social and community facilities from these forecasts. As Chapter 5 indicated, the bulk of suburbs within the Shire are expected to increase at a moderate rate.

Fortunately, the migration profile is such that many areas will regenerate and maintain similar population structures. Areas with limited development potential are expected to age more significantly which will place a strain on Council services, especially in areas that were historically dominated by families.

The areas that are most likely to test Council and its service delivery are the Hornsby Town Centre, Asquith, Cherrybrook and Waitara due to the volume of growth. The latter area has experienced significant growth over the past decade which is likely to have already elicited a range of Council policy responses. The actions of State Government decision-making around the Metro Station at Cherrybrook could have significant impact on Council to provide services to development that Council has no control over. The exact amount of development in this area is yet to be determined.

The sections below highlight some of the more important changes to population at the local area level. They also indicate some of the challenges for Council service provision from the forecasts.

Pre-school services and childcare

The change in pre-schoolers to 2036 presents a challenge to Council planners. The main areas of growth are likely to be in the Hornsby Town Centre, Asquith and Cherrybrook and other areas of significant dwelling change. The growth in these areas will put pressure on child care, maternal -child health services and ultimately schools. Some areas, notably Berowra Heights - North Eastern Rural Balance are expected to decrease in this age group, which will put pressure on the maintenance of local services. The strong level of growth in the Hornsby Town Centre is expected to be offset by a decrease in the balance area of the suburb of Hornsby.

This overall forecast increase of pre-schoolers is not expected to be much faster than the trends of the past decade. The overall number of 0-4 year olds in Hornsby Shire increased from 8,370 in 2006 to 8,940 in 2016 or 0.7% per annum. However, the distribution in these age groups is likely to change, with a greater share of the increase in areas with medium and high density development. See Table 14 below.

Table 14. Forecast change 0-4 year olds, Hornsby Shire, 2016-2036

Area	2016	2036	Net change	% change (av. Annual)
Hornsby Town Centre	37	560	523	14.6%
Asquith	245	557	312	4.2%
Cherrybrook	847	1,080	233	1.2%
Beecroft - Cheltenham	437	568	131	1.3%
Mount Colah - Mount Kuring-gai	586	701	115	0.9%
Waitara	544	647	103	0.9%
Galston - Middle Dural	176	231	55	1.4%
North Epping	209	255	46	1.0%
Dural	264	306	42	0.7%
Westleigh	247	289	42	0.8%
Wahroonga	290	323	33	0.5%
Normanhurst	314	339	25	0.4%
Berowra	345	369	24	0.3%
Brooklyn	15	32	17	3.9%
Arcadia - North Western Rural	211	226	15	0.3%
Pennant Hills	440	455	15	0.2%
Hornsby Heights	427	427	0	0.0%
Thornleigh	646	638	-8	-0.1%
Castle Hill	195	182	-13	-0.3%
West Pennant Hills	319	288	-31	-0.5%
Hornsby (non-Town Centre area)	1,671	1,633	-38	-0.1%
Berowra Heights - North Eastern Rural Balance	481	392	-89	-1.0%
Hornsby Shire Total	8,944	10,498	1,554	0.8%

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

Recreational services

One of the key challenges of high-density living is the pressure on Council to deliver recreational services. Although a large share of the Shire consists of the National and Regional Parks, as well as nature reserves, the urban areas have limited recreational facilities. The population growth in the Shire will place greater strains on recreation reserves and sporting / leisure facilities. Areas where access to high-quality public space could be under pressure include Waitara and Asquith, where population densities have and are increasing rapidly. These areas are expected to experience large increases in children who are key users of recreational facilities, both as individuals and in sporting clubs.

A key part of planning for the Hornsby Town Centre will be to ensure that there is adequate open space and connectivity. There are already significant additional reserves planned, with the development of the Hornsby Quarry Parklands. As part of the development process for the Hornsby Town Centre, Council may wish to provide guidance to developers to increase and improve open space provision and connectivity. Another area that is expected to grow is Cherrybrook, with development expected around the Sydney Metro station. Council will have an opportunity to lobby State Government to include recreational facilities and open space as part of the development.

There is also considerable population growth occurring on the edges of the Shire. The most significant of this growth is occurring in the suburb of Epping, part of which was in Hornsby Shire for many years. This area is transforming in density and growing at enormous rates. The centre is already densely populated and is set to become one of the major transport hubs in the middle northern suburbs of Sydney. As such, it is an excellent place for greater population density. However, the suburb has limited parkland and recreational space.

There is likely to be an impact on parts of Hornsby Shire as a result of this growth. The Shire boasts substantial natural assets and in general may be attractive to people from LGAs to the south. At the local level, North Epping is not expected to grow significantly, but people from Epping are likely to access the reserves and parkland in the area.

Cultural and Community Services

With a greater density of young adults, especially around the Hornsby Town Centre, Waitara and Asquith, the Shire has an opportunity to enhance its local entertainment and art scene. The resident population of the Town Centre is currently estimated at less than 500 persons in 2019, but the large forecast increase of population in central Hornsby, especially young adults, would provide the opportunity to expand and diversify cultural activities in the Shire. Young adults are key producers and consumers of culture.

As Table 15 indicates, the growth in young adults is quite different across the Shire, with the largest gain of 15-29 year olds to 2036 expected to be in the Hornsby Town Centre. The strong rates of development in Asquith and Waitara are also expected to drive increase in this age group to 2036

While the large increases of 15-29 year olds in concentrated locations provides an opportunity for both the private sector and Government to provide more community facilities, other areas are expected to age and some existing facilities and services may come under pressure. The number of young adults in some of the rural parts of Hornsby Shire is expected to fall, especially in Dural, while Cherrybrook and Castle Hill will experience a loss in these ages due to ageing. In both Cherrybrook and Castle Hill, there is currently a large youth cohort. It is notable that there is an expected decrease in these ages in Cherrybrook despite the considerable development around the Metro Station.

Table 15. Forecast change 15-29 year olds, Hornsby Shire, 2016-2036

Area	2016	2036	Net change	% change (av. annual)
Hornsby Town Centre	95	2,153	2,058	16.9%
Asquith	640	1,626	986	4.8%
Waitara	903	1,438	535	2.4%
Hornsby (non-Town Centre area)	4,206	4,668	462	0.5%
Thornleigh	1,543	1,922	379	1.1%
Pennant Hills	1,519	1,819	300	0.9%
Beecroft - Cheltenham	1,641	1,924	283	0.8%
Mount Colah - Mount Kuring-gai	1,677	1,891	214	0.6%
West Pennant Hills	636	820	184	1.3%
Wahroonga	680	862	182	1.2%
Galston - Middle Dural	579	716	137	1.1%
Normanhurst	1,003	1,117	114	0.5%
Berowra	889	983	94	0.5%
Hornsby Heights	1,091	1,184	93	0.4%
Berowra Heights - North Eastern Rural Balance	974	979	5	0.0%
Westleigh	751	737	-14	-0.1%
Arcadia - North Western Rural	750	733	-17	-0.1%
Brooklyn	109	78	-31	-1.7%
North Epping	823	791	-32	-0.2%
Dural	1,118	1,013	-105	-0.5%
Cherrybrook	3,924	3,774	-150	-0.2%
Castle Hill	976	734	-242	-1.4%
Hornsby Shire	26,526	31,960	5,434	0.9%

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

g) Impact on tourism, employment land, industrial and urban services

These forecasts have some impact on some of the economic strategies, such as the demand for employment land and urban services. The main impact on employment land and urban services will be around the Hornsby Town Centre. Council have already identified the need to maintain some core areas of Hornsby for employment land, especially over time as residential development proliferates and particularly for higher end uses such as offices, research and development.

Council is currently undertaking employment, economic development and tourism studies as part of the Accelerated LEP Review. These forecasts should be considered in undertaking those studies.

9. Data

Detailed data by single year of age for each area is available on the website.

<https://forecast.id.com.au/hornsby>

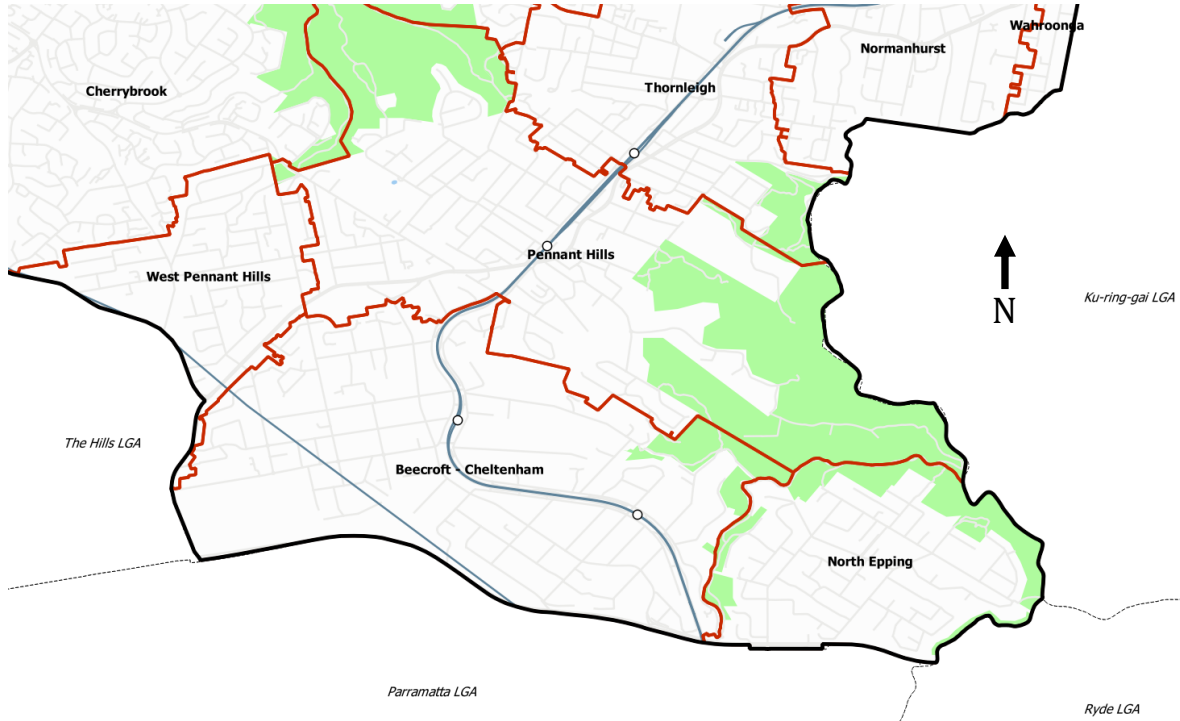
For detailed maps of all areas in Hornsby Shire, please see Appendix 1.

10. References

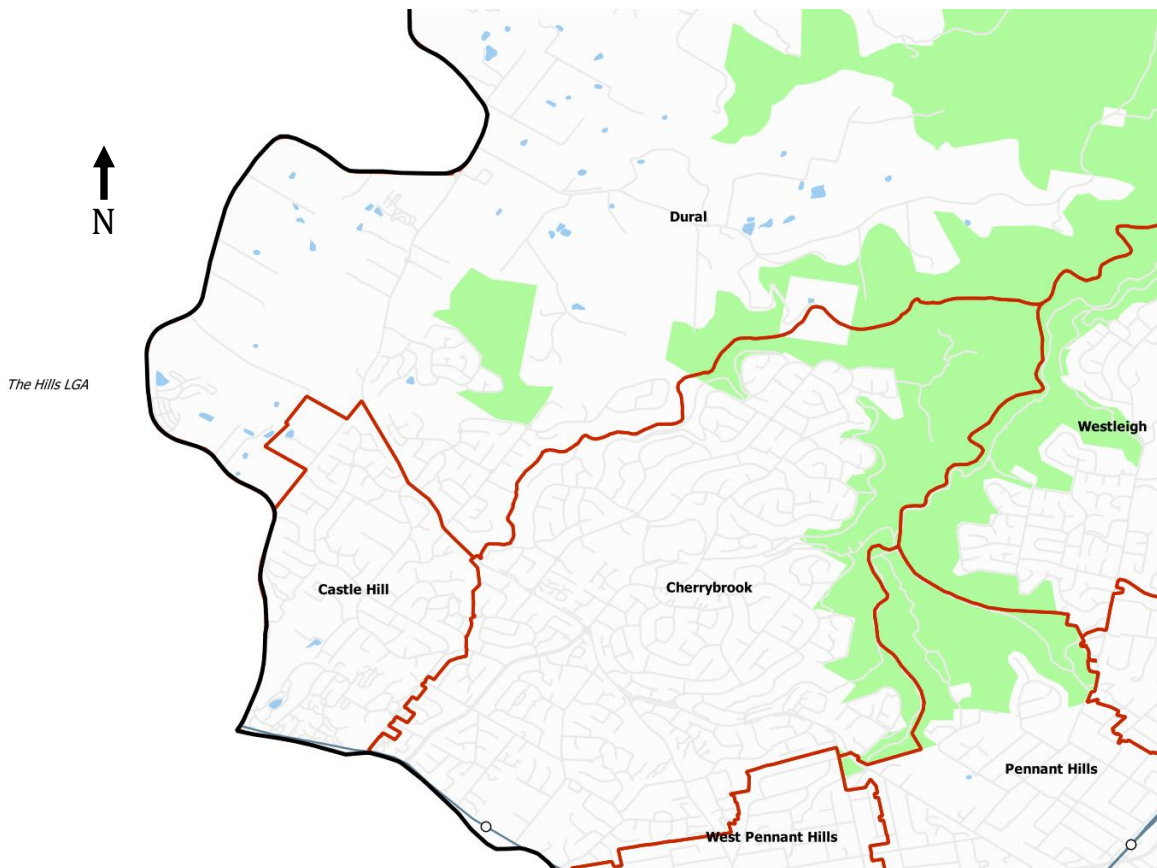
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Appendix 1 – Hornsby Shire area maps

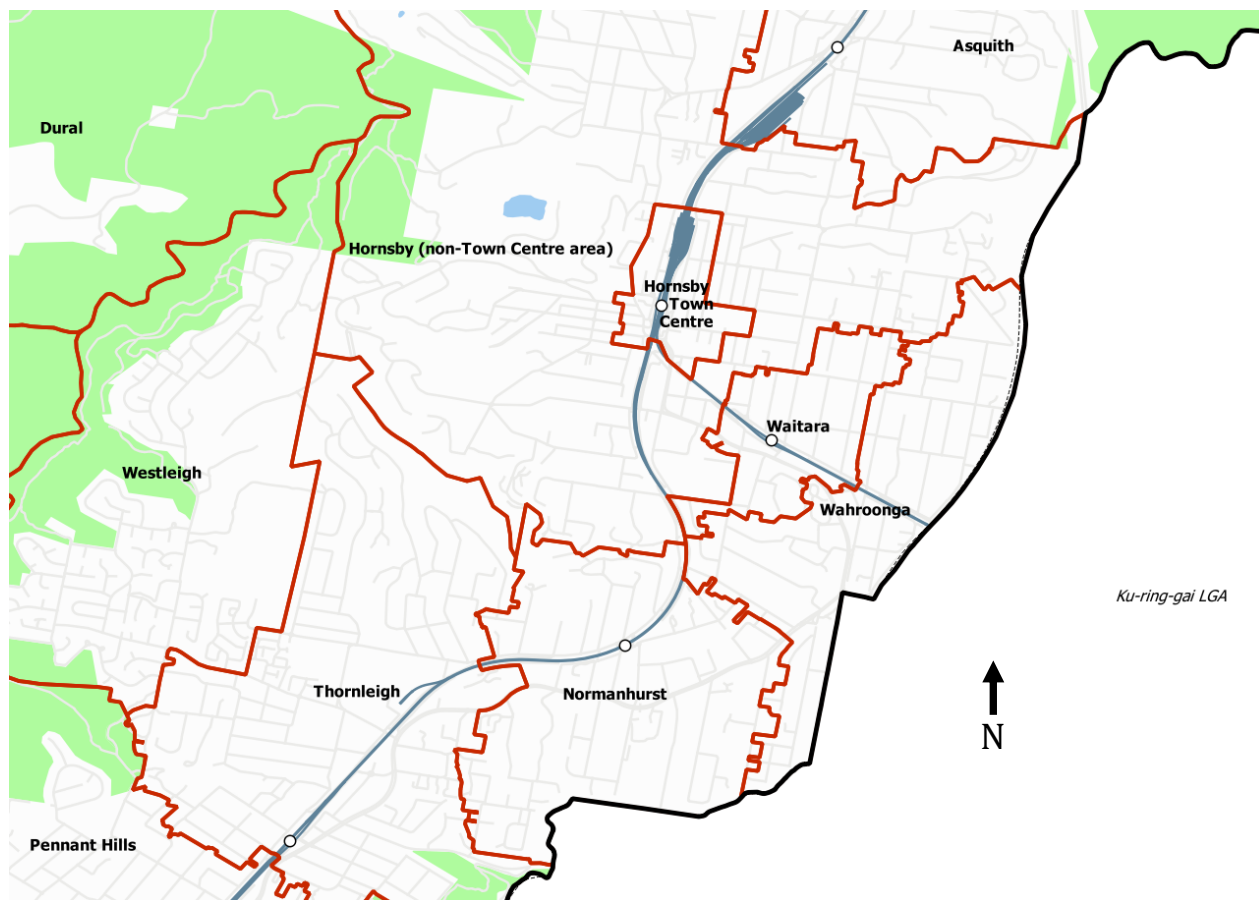
Hornsby Shire – southern areas



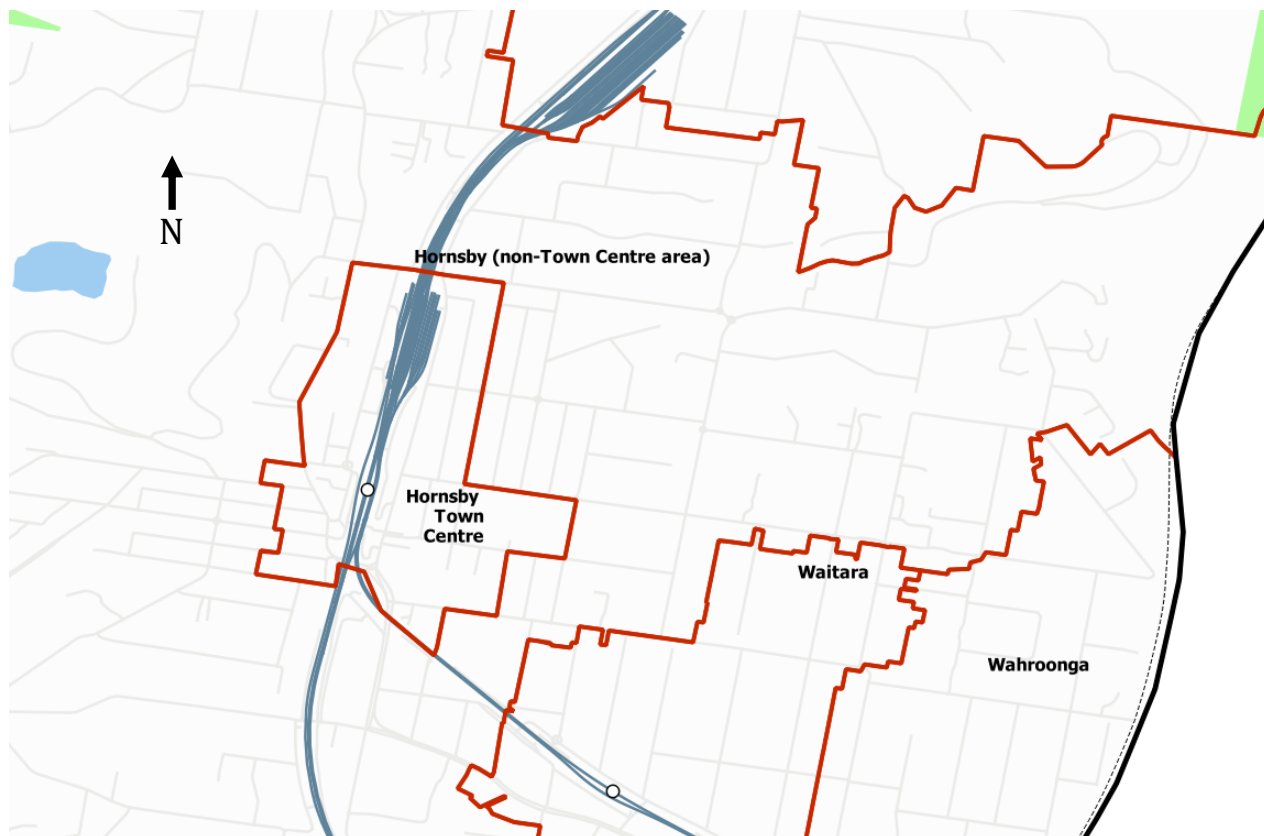
Hornsby Shire – south western areas



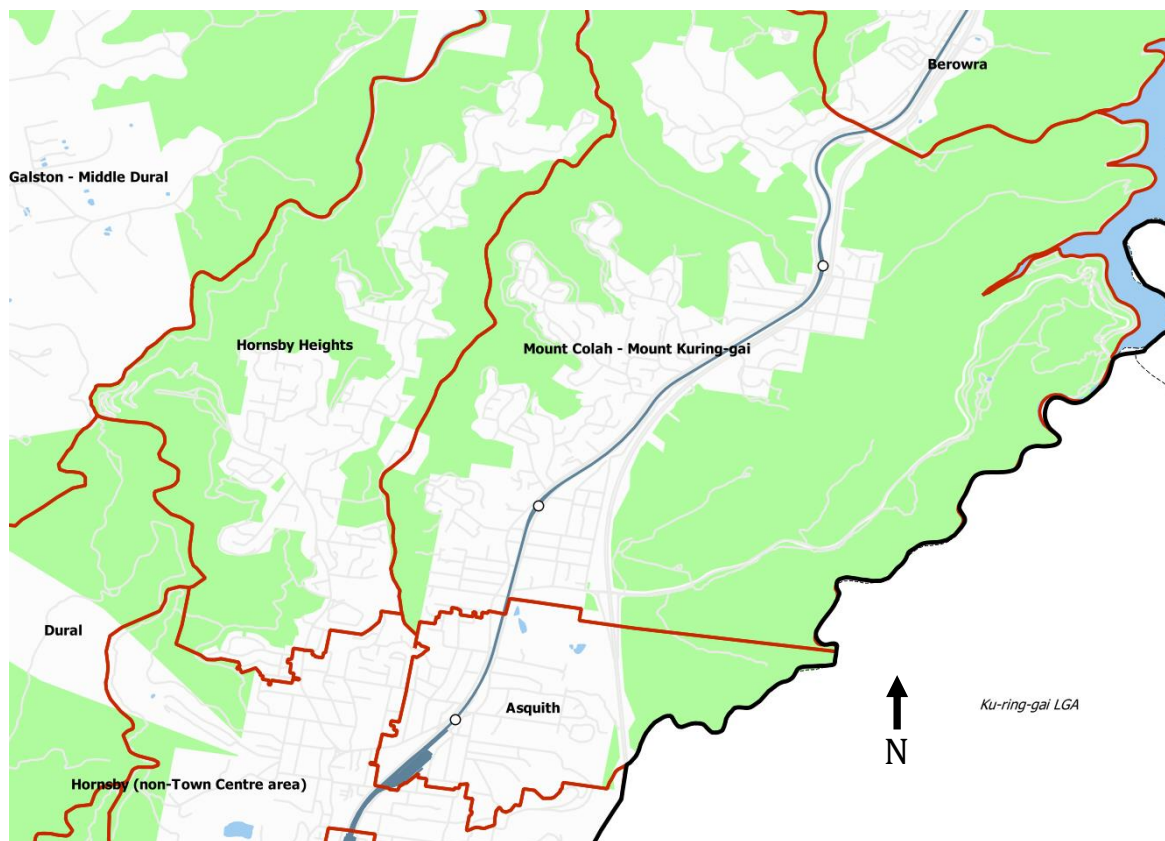
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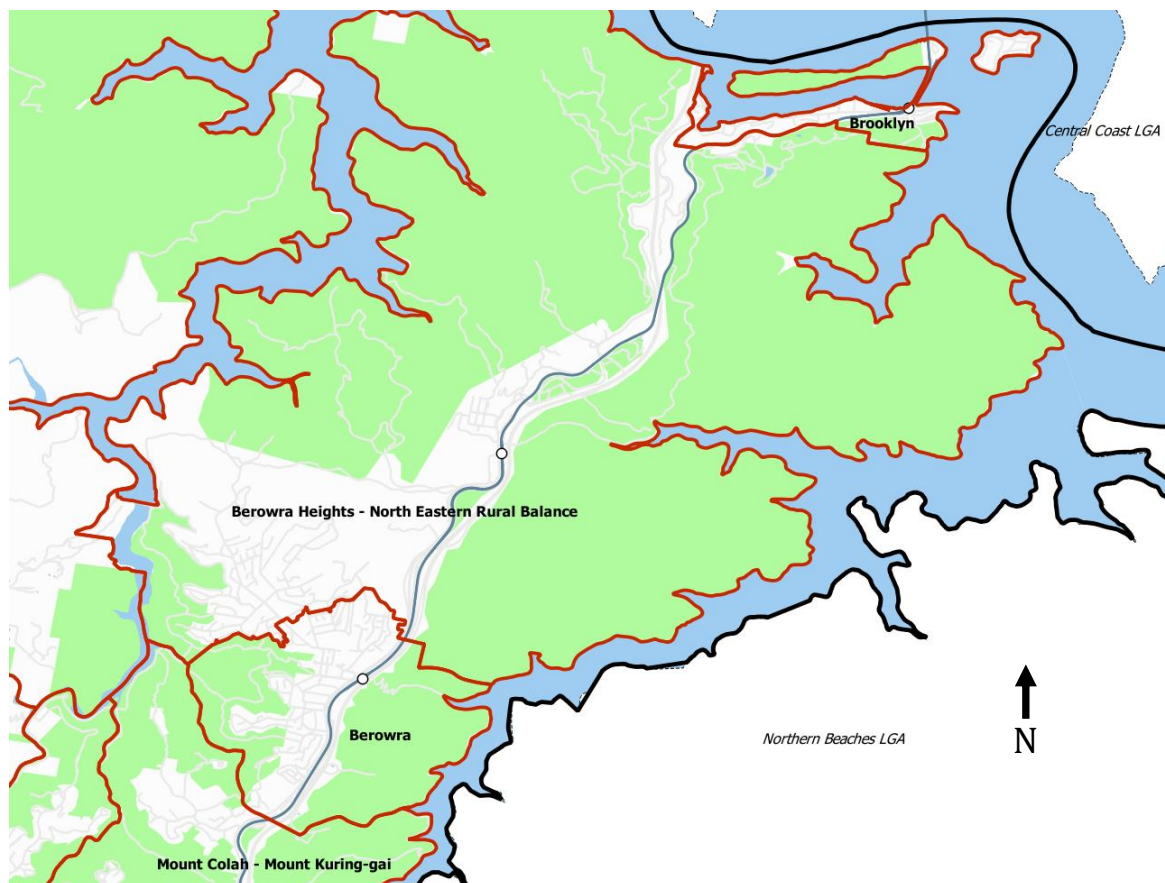
Hornsby Shire – Hornsby Town Centre and surrounds



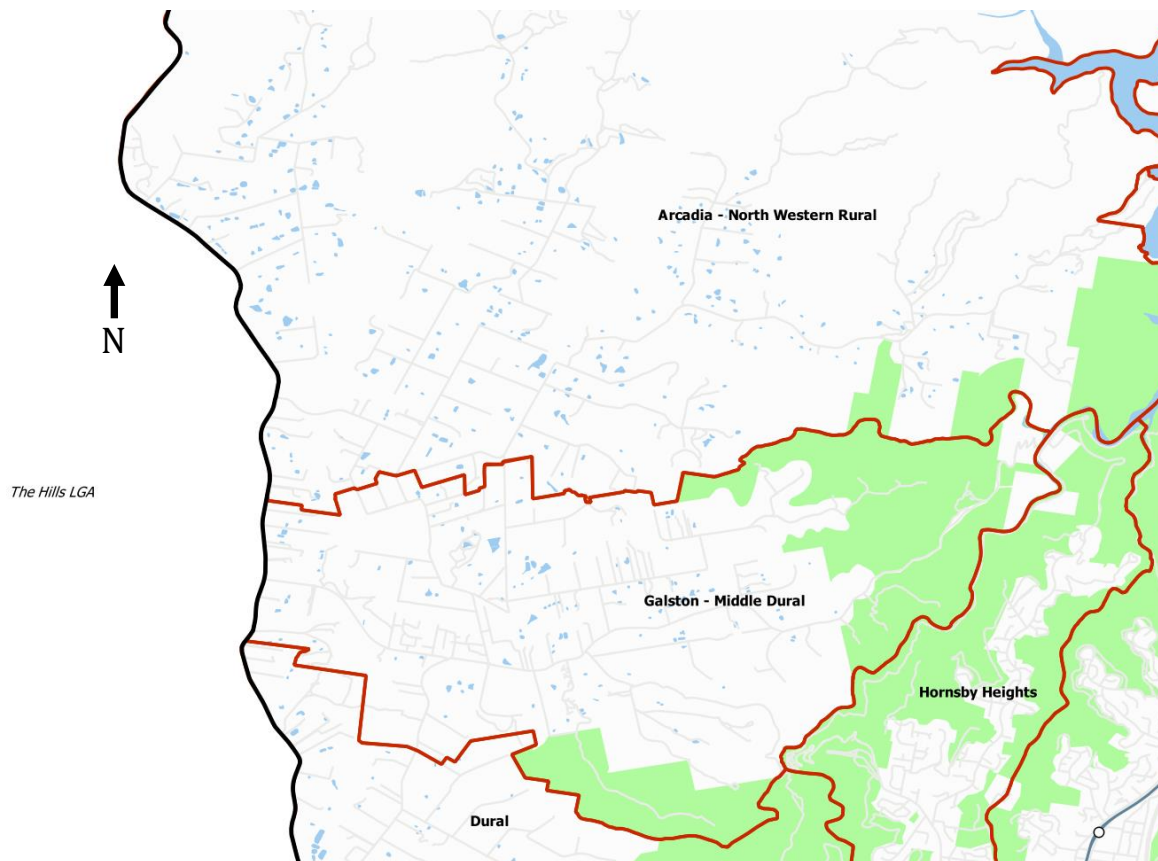
Hornsby Shire – central eastern areas



Hornsby Shire – north eastern areas



Hornsby Shire – central western areas



Hornsby Shire – north western areas

