

HORNSBY SHIRE COUNCIL

A shire of opportunity



The social, generational, economic and demographic trends impacting Hornsby Shire are creating not only new challenges but great opportunities. Unprecedented change can sometimes lead to change fatigue where the response can be to become worried about change, or equally it can lead to change apathy which can create an indifference to change.

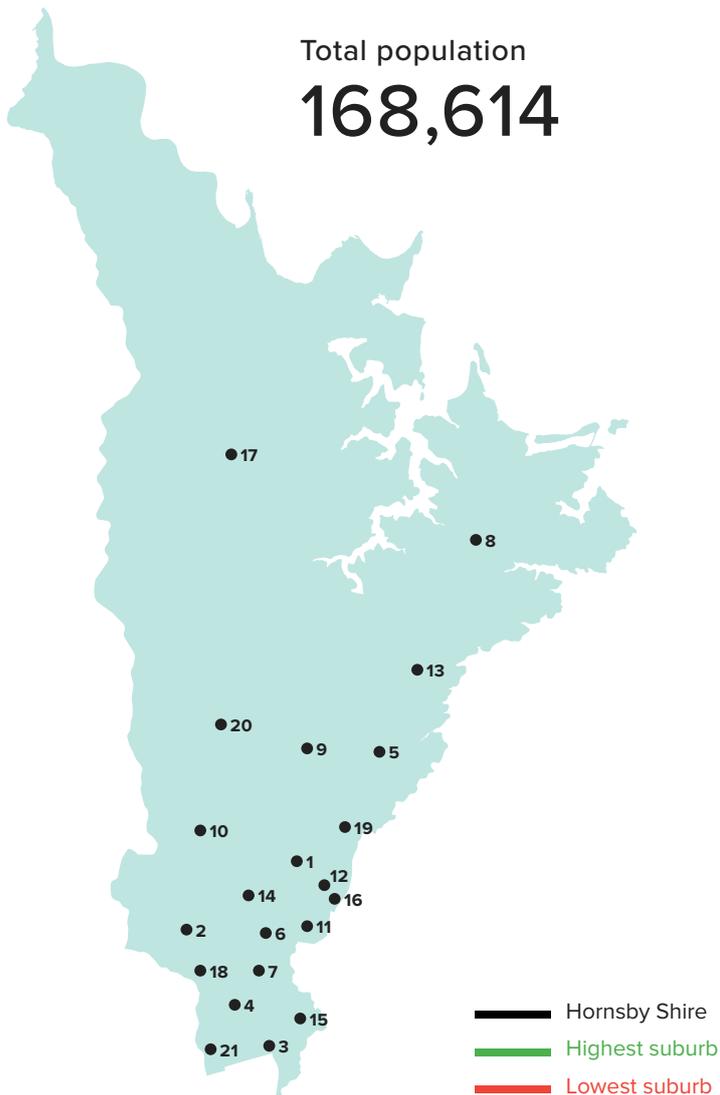
However by understanding the emerging trends, we can be more prepared for the changes and so rather than becoming defensive or blasé we can respond to the shifts, influence the trends and shape the future. This report outlines ten of the top trends that currently define the Hornsby Local Government Area and which are shaping this shire of opportunity.

Top 10 trends

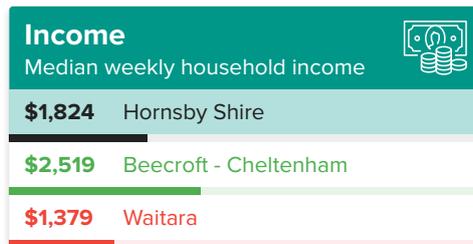
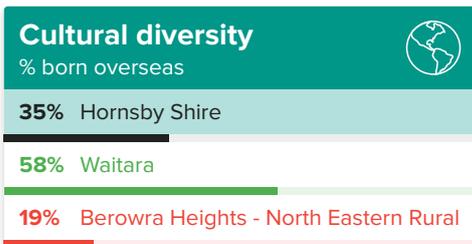
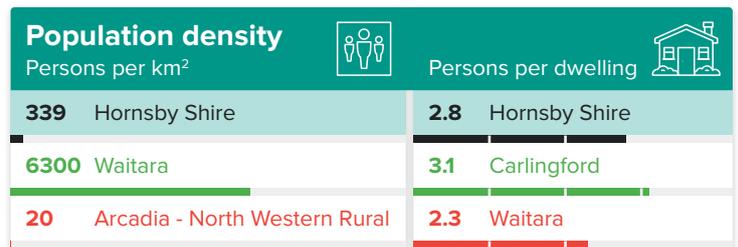
1. Growing population, increasing densification
2. Ageing population, transitioning generations
3. Educational attainment, professional employment
4. Entrepreneurship for small and home-based businesses
5. Property ownership and investment growth
6. Stable workforce, lower unemployment
7. Mobile lifestyle enabled though public transport and cars
8. A home for families and the next generations
9. A place of cultural and language diversity
10. The lifestyle shire

Hornsby Shire Council

A demographic snapshot



#	Suburb	Population	Median Age
1	Hornsby	20,484	37
2	Cherrybrook	18,347	41
3	Epping	13,837	38
4	Beecroft - Cheltenham	10,445	44
5	Mount Colah - Mount Ku-ring-gai	8,542	38
6	Thornleigh	7,952	38
7	Pennant Hills	7,037	41
8	Berowra Heights - North Eastern Rural	6,795	39
9	Hornsby Heights	5,905	38
10	Dural	5,372	41
11	Normanhurst	5,186	40
12	Waitara	4,835	39
13	Berowra	4,469	37
14	Westleigh	4,384	42
15	Epping North	4,251	41
16	Wahroonga	4,034	42
17	Arcadia - North Western Rural	3,811	41
18	West Pennant Hills	3,669	40
19	Asquith	3,235	39
20	Galston - Middle Dural	3,184	43
21	Carlingford	3,179	41



1

Growing population, increasing densification

Australia over the last decade has consistently been one of the fastest growing developed nation in the world and by the end of 2016 Australia's largest city, Sydney, which is home to 1 in 5 Australians will reach 5 million people. Amidst this backdrop of significant national growth, Hornsby Shire has experienced consistent growth with a population increase of 9.1% since 2003. Between 2003 and 2014 the population of Hornsby Shire grew from 154,504 to 168,614 residents, an increase of 14,110 people.

Hornsby Shire's population growth



Hornsby Shire is experiencing constant growth and has grown by 9.1% since 2003.

Australia has an annual growth rate of 1.6% per annum with the national population set to reach 24 million by the end of 2015. Australia's growth rate far exceeds the OECD average of 0.6% per annum as well as the world growth rate of 1.0% per annum.

Average people per household



Hornsby Shire has more people per household (2.9) than Greater Sydney (2.7).

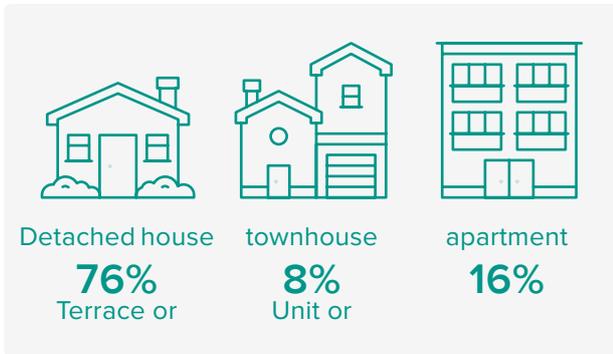
As populations grow, households and household structures change. While the Hornsby Shire has more people per household (2.9) than Greater Sydney (2.7), NSW (2.6) and Australia (2.6), the demand for smaller homes to accommodate smaller households is on the rise. The proportion of detached houses in the Hornsby Shire has decreased since 2001 (from 77.6% to 75.5%) while medium and high density dwellings such as units or apartments and semi-detached or terrace houses have increased (14.2% to 16.5% for units and 6.8% to 7.6% for semi-detached dwellings).

Capital cities in Australia are becoming increasingly dense with more medium and high density developments and infill of our cities.

1

Growing population, increasing densification

% of Hornsby Shire households by dwelling type



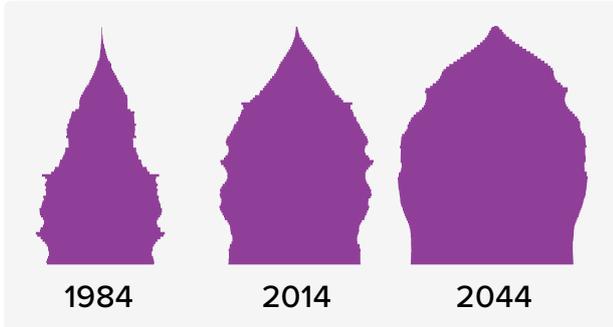
While 70% of NSW residents live in detached houses, just 44% of new dwelling approvals in NSW in the last year have been for detached houses. The remaining 56% of approvals have been for medium and high density dwellings such as units and town houses.

With such population growth comes increasing diversity, a rich lifestyle, greater entertainment options but also rising house prices, a growth demand for public services, and potential strain on local infrastructure and transport.

2

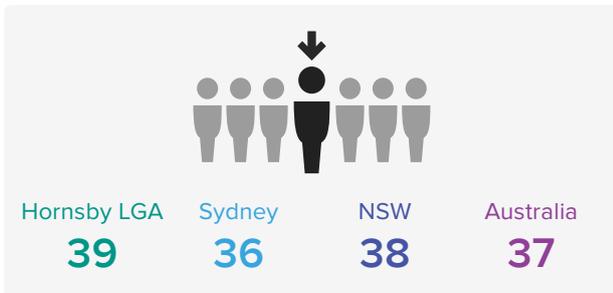
Ageing population, transitioning generations

Population pyramids



Australia's population pyramids visually show the growth of our ageing population, and in 2044 our population pyramid will become inverted with the number of over 60s outnumbering the under 18s for the first time. Our median age is also increasing – three decades ago the median age of an Australian was 30.5, today it is 37.3 and in 2044 it is projected to be 40.

Median age



Hornsby Shire has an ageing population but there is also evident growth in those aged under 20 and in the number of families living in the area. The median age of Hornsby Shire residents is 39, increasing from 38 in 2006. This compares to a median age of 36 across Greater Sydney. Hornsby and Berowra are the two Hornsby Shire suburbs with the lowest median age at 37.

Whilst our nation is ageing, we are also experiencing a significant baby boom, with over 310,000 births each year. The younger generations are sizable, with Gen Y (born 1980-1994) making up over 1 in 5 Australians (22%), and Gen Z (born 1995 to 2010) making up almost another 1 in 5 Australians (18%).

From the Baby Boomers to Generation X and Generation Y, it is now Generation Z that is emerging. These new generations are the global, social, visual and technological tweens, teens, youth, and young adults of our society. Hornsby Shire has a higher proportion of Gen Zs than Greater Sydney's average and 1 in 14 Hornsby Shire residents are 15-19 years of age (7.2%), 0.9% higher than that of the Greater Sydney population (6.1%). This is similar for the 10-14 year age bracket with 6.9% of Hornsby Shire's population falling into this age group, 0.8% higher than the Greater Sydney population of 10-14 year-olds (6.1%).

Hornsby Shire has a higher proportion of 10-19 year olds than the Greater Sydney population and a higher proportion of households comprised of couples with children.

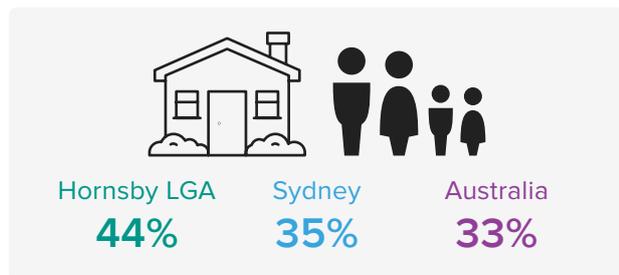
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Ageing population, transitioning generations

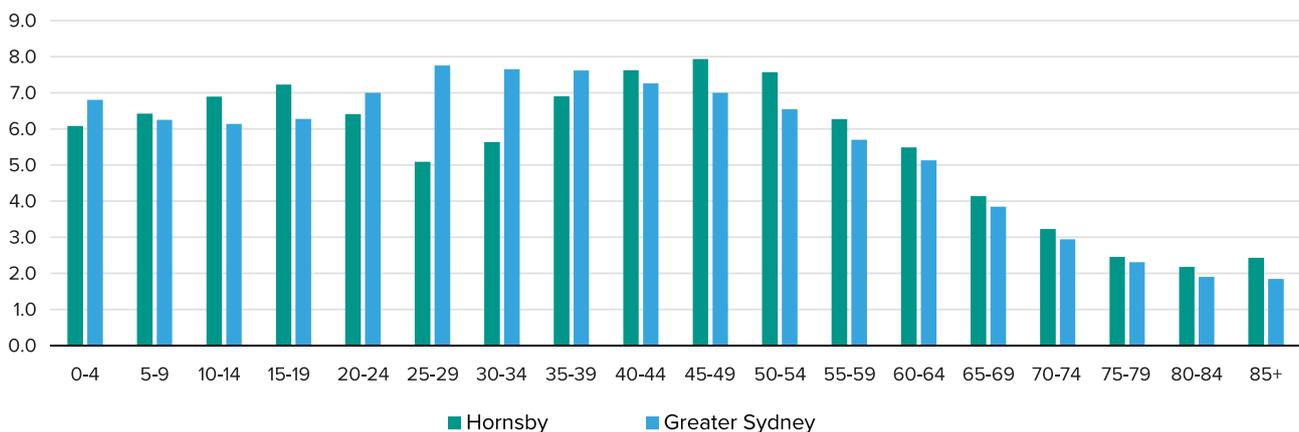
Hornsby Shire also has a significantly higher proportion of family households, with nearly 1 in 2 (44.4%) households comprised of couples with children (an increase of 43.6% from 2006). In comparison just 35% of Greater Sydney households, and 33% of households nationally comprise couples with children. The number of babies born in the Hornsby Shire has also increased over the last decade. In 2001 the Hornsby Shire population of 0-4 year olds was 8,971, increasing to 9,549 in 2011.

Australia's demographic growth is one of the most significant drivers of change in our communities, and Australia is on the brink of one of the greatest intergenerational transitions ever recorded. Today's Baby Boomers, born in the post-war baby boom between 1946 and 1965, are now reaching retirement age. Whilst today these Baby Boomers comprise 25% of the workforce, they will make up just 8% of the workforce by 2025. Along with this work, leadership and earnings transfer goes a housing one. Just as suburbs such as Epping, Eastwood, Carlingford and Waitara have experienced significant generational change over the last two decades, so the suburbs including Westleigh, Cherrybrook, and West Pennant Hills are now in the midst of similar generational renewal.

% of couple with children households



Age profile: Hornsby Shire vs. Sydney (%)



3

Educational attainment, professional employment

Australians are more educated today than they have been at any other point in history. The number of students completing undergraduate and postgraduate courses today is on the rise and for the first time in Australian history more than half the population aged 15-64 have a post-school qualification (51%). Over 70% of the newest wave of high school graduates, Generation Z, are pursuing further education and training, with almost half of them going on to university.

Hornsby Shire residents are particularly well educated, with educational attainment higher than across Greater Sydney. One third of Hornsby Shire residents (34%) have university qualifications, higher than the average of Greater Sydney (21%) and NSW (20%) residents. The proportion of the population attending university in Hornsby Shire is also higher than in Greater Sydney and NSW (6% compared to 4% and 5%).

The proportion of Australians who have a Bachelor or post-graduate degree is increasing significantly generation by generation. Whilst 1 in 10 Builders (70+) and 1 in 5 Baby Boomers (51-69) hold a university degree, this is true for 1 in 4 Gen X (36-50) and 1 in 3 Gen Y (21-35). It is projected that 1 in 2 Gen Zeds (today's 6 to 20 year-olds) will be university educated.

% with university qualifications



Higher education qualifications in Hornsby Shire (34%) are well above those of Greater Sydney (21%) and NSW (20%). This, along with the greater proportion of current university students than the Sydney and state average is all the more remarkable considering that the Hornsby LGA does not have any university campuses within its boundaries.

% currently attending university



3

Educational attainment, professional employment

The top three industries in which Hornsby Shire residents are employed are Health Care and Social Assistance (13%), Professional, Scientific and Technical Services (13%) and Education and Training (10%). These employment industries are also experiencing the greatest growth in the Hornsby Shire, growing by 1%, 0.8% and 0.5% from 2006 to 2011 respectively. The proportion of individuals who are employed in these industries in Hornsby Shire is greater than the proportion employed in these industries across Greater Sydney.

Top 3 industries of employment in Hornsby Shire



Health care and social assistance

Hornsby LGA Sydney

13% **11%**



Professional, scientific and technical services

Hornsby LGA Sydney

13% **10%**



Education and training

Hornsby LGA Sydney

10% **8%**

The Top 3 industries of employment of Hornsby Shire residents are professional sectors.

4

Entrepreneurship for small and home-based businesses

Australia has long been an entrepreneurial nation, with small business the backbone of the economy and the labour force. The Australian spirit of independence, a DIY attitude and the courage to give things ago have led to more than 2.1 million actively trading business across the nation – one for every 11 Australians. Hornsby Shire is home to many of these small businesses.

Over the last eight years the Hornsby Shire Gross Regional Product (GRP) has increased by \$458 million, from \$6,166 million in 2006 to \$6,624 million in 2014. The number of businesses in the area has increased from 14,716 to 15,485 over a four year period (from 2008 to 2012) with 2,073 business entries in 2012 alone.

There is one business in the Hornsby Shire for every 10.7 residents, highlighting the significant impact of small businesses to the Hornsby Shire economy. The industry containing the highest proportion of Hornsby Shire businesses are Professional Scientific and Technical Services (21%) followed by Construction (14%) and Rental, Hiring and Real Estate Services (10%).

Over a four year period, the number of businesses in the Hornsby Shire increased by 5%. With an educated, professional and diverse population, located in an area with several growing business districts, the Hornsby Shire will be the base of an increasing number of micro and small businesses as well as an incubator for innovative, entrepreneurial start-ups and knowledge-based solutions providers.

Every week on average across the Hornsby Shire, 40 new businesses commence.

Business to population ratio



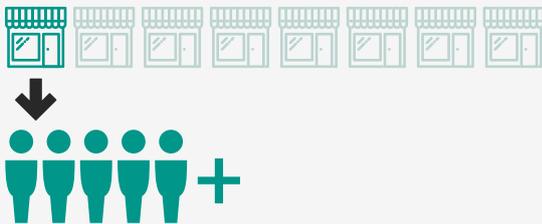
There is one business in the Hornsby Shire for every 10.7 residents.

4

Entrepreneurship for small and home-based businesses

1 in 8 businesses in Hornsby Shire have five or more employees (12%) and 2 in 3 businesses (59%) in the area are non-employing businesses. Major commercial hubs of Hornsby Shire include Hornsby (150,000m²), Pennant Hills (60,000m²), Epping (50,000m²), Thornleigh (46,000m²), Carlingford (35,000m²) and Dural Service Centre (15,000m²)¹.

Business size



1 in 8 businesses have 5+ employees.

Small business continue to dominate the Australian economy, with 3 in 5 Australians businesses not employing staff, and 9 in 10 business employing less than 20 workers. Just under a third of all businesses (29%) have a turnover of less than \$50,000 annually, with another third (35%) turning over between \$50,000 and \$200,000 each year.

% non-employing businesses



Non-employing businesses account for 59% of businesses in the area.

¹ <http://www.hornsby.nsw.gov.au/council/about-our-shire/investment>

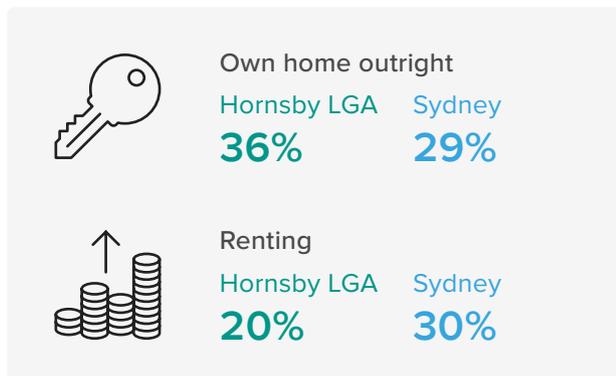
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Property ownership and investment growth

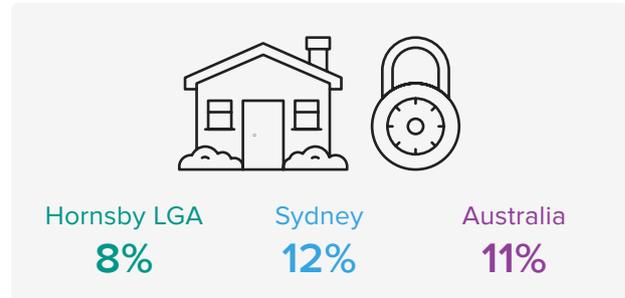
Over the coming decades as Australia's cities respond to population growth, more people will be living in more households on smaller blocks of land. There has also been a considerable decline in the detached house share of new dwellings over the last 20 years, and a significant rise in unit or apartment dwelling approvals. While 7 in 10 Sydneysiders currently live in a detached home, over half of new housing approvals are now for medium or high-density housing.

Across Australia, 31% of Australians are renting, 36% are paying a mortgage and a third (33%) fully own their home. Hornsby Shire is home to a significantly higher proportion of households who fully own their home, with 36% owning their home compared to 29% across Greater Sydney. The Shire subsequently has a lower proportion of households who are renting (20%) than those renting across Greater Sydney (30%).

Home ownership (%)



% with mortgage stress



Despite the high prevalence of households with a mortgage (37% in Hornsby Shire compared to Greater Sydney (33%), the proportion of households in mortgage stress is lower in Hornsby Shire (8%) than Greater Sydney (12%) and Australia nationally (11%). Mortgage stress refers to households in the lowest 40% of incomes who are paying more than 30% of their usual gross weekly income on home loan repayments.

Whilst wages have gone up over the past several decades, they have not kept pace with rising house prices. Four decades ago the average earnings were \$7,600, now they are \$72,000, which is almost a ten fold increase. Over that same period of time, however, house prices have gone up by at least thirty fold in Sydney.

5

Property ownership and investment growth

The number of approvals for new houses and other residential buildings have increased in the Hornsby Shire, indicating high levels of residential development, economic activity, employment, and investment. New housing approvals have remained relatively constant over the past decade (between 202 and 265 per year) but residential building approvals for dwellings other than houses have increased significantly by nearly 200% per annum (from just 34 in 2010-2011 to 919 in 2013-2014).

In 1975, the average house price in Sydney was 5x the average full-time earnings, in 1995 it was 6x the average full time income, but today Sydney median house prices are more than 13x average full-time earnings.

The number of approvals for new houses and other residential buildings have increased significantly. The Hornsby Shire has seen significant wealth created for Baby Boomers and Generation X through home ownership and now the area is providing the emerging generations with new opportunities for net-worth growth through investment in apartments.

6

Stable workforce, lower unemployment

In 2014, Hornsby Shire had lower levels of unemployment than NSW and Australia (5.2% compared to 5.9% and 6.2%). 82,483 Hornsby Shire residents are part of the labour force (2011). Of these, two thirds are employed full-time and one third are employed part-time.

Unemployment (%)



Australia's top industries of employment have shifted significantly over the last 30 years and the workforce has undergone significant structural change, moving from an industrial to a knowledge base. The Top 5 industries 30 years ago were all industrial (mining, utilities, manufacturing, construction, and transport) whereas today there has been a shift to professional industries (The Top 5 today are mining, technical, IT, financial, and utilities).

Hornsby Shire residents are most commonly in professional (33%), clerical and administrative (16%) and manager (15%) occupations. The proportion of residents who are working professionals is greater in Hornsby Shire than across Greater Sydney (26%), while occupations such as machinery operators and drivers (2% compared to 6%) and labourers (5% compared to 7%) are lower.

Top 3 occupations in Hornsby Shire



6

Stable workforce, lower unemployment

Hornsby Shire’s population is more geographically stable and less likely to move house than other populations across Greater Sydney, NSW and Australia. 85% of Hornsby Shire residents indicated that they lived at the same usual address in the one year leading up to the 2011 Census, compared to 80% of Greater Sydney, 80% of NSW and 79% of residents nationally. 59% indicated that they lived at the same address in the five years leading up to the 2011 Census, also higher than other averages (53% Greater Sydney, 53% NSW, 51% nationally).

% who did not move house in the 5 years preceding the 2011 Census



Generation Z (born since 1995) will follow on the multi-career, multi-residence course of Generation Y (born from 1980-1994) and end up working in 17 jobs, across 5 careers and living in 15 different homes in their lifetime. However it is likely that those in Hornsby Shire won’t exhibit the extremes of these transitions. In a time of change, churn and mobility, Hornsby LGA shows a population of more stability — both vocational and residential.

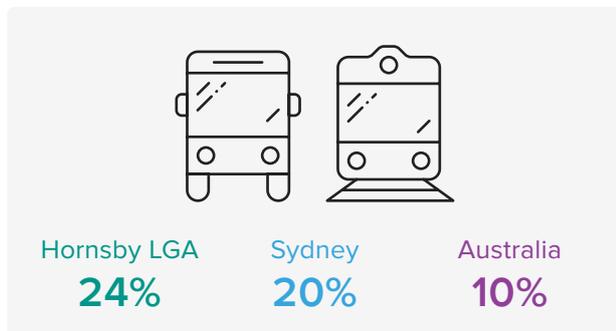
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Mobile lifestyles enabled through public transport and cars

Australians are increasingly juggling multiple roles within their complex and mobile lives. From getting children to school to almost two shopping visits per week, from employment and the multi-career aspects of our lives through to ongoing education, the geographical locus of living is greater and our lifestyles increasingly require the flexibility of easy to access transportation.

Hornsby Shire residents are very mobile using both public transport and cars. While just 10% of Australians travel to work via public transport (20% for Greater Sydney), this is true for 24% of Hornsby Shire residents. Hornsby Shire residents are thus slightly less likely to travel to work by car than other populations in Greater Sydney (55% compared to 58%).

% who travel to work on public transport



Sydney has as many people who get to work by train (almost 190,000) as the rest of Australia combined. And with Hornsby Shire containing 14 train stations, residents have an even higher representation of train usage. Along with buses, almost 1 in 4 local residents travel to work by public transport – significantly above the Sydney average.

Of the 10 million Australians who make their way to work every day, 1 in 10 catch public transport for their daily commute and almost 2 in 3 travel by car.

Whilst 1 in 10 Australian households (9%) don't own a car, 1 in 6 households own 3 or more vehicles. Three quarters of households (74%) own one to two cars.

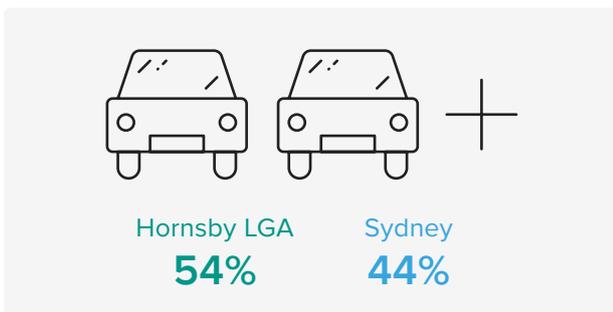
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Mobile lifestyles enabled through public transport and cars

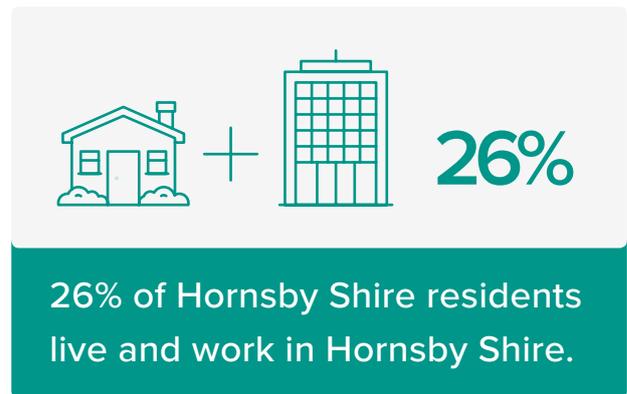
While more likely to take public transport options to work, residents of Hornsby Shire enjoy the flexibility provided by having a car, and also own more cars than the Greater Sydney average. 54% of Hornsby Shire households have two or more cars compared to 44% of the Greater Sydney population.

Residents enjoy the option of working locally, and 26% of Hornsby Shire’s working population live and work within the shire. Hornsby Shire’s employment centres continue to attract a local workforce, providing benefits of access, mobility, and lifestyle.

% who have two or more cars



% residents who work in the area



Australia is growing by 300,000 cars each year and is currently home to 13.3 million registered passenger vehicles – 1 vehicle per 1.37 people of driving age. The average Australian car drives 12,881 kilometres per year which means Australians, in their more than 13 million vehicles drive a combined 167 billion kilometres annually, which is the equivalent of driving to Pluto and back almost 20 times every year!

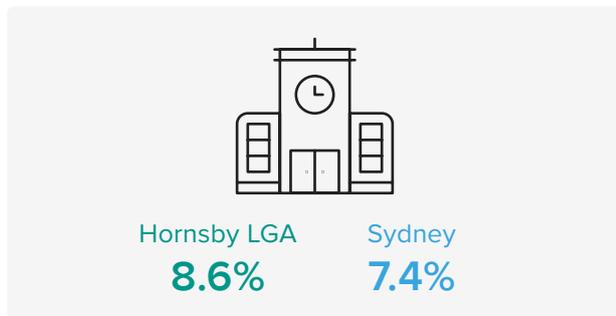
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A home for families and the next generations

Couple families with children are the most prevalent family composition in the Hornsby Shire and represent a higher proportion of family households than NSW and Australia (56% compared to 46% and 45% respectively). The average number of children per family in the Hornsby Shire is 1.8, slightly lower than that of Greater Sydney (1.9) and Australia (1.9).

Under 18s represent a slightly higher proportion of the Hornsby Shire population than Greater Sydney (24% compared to 23%), and whilst babies and pre-schoolers represent a smaller proportion (6.1% compared to 6.8%), there are slightly higher proportions of primary (9.1% compared to 8.7%) and secondary school age children (8.6% compared to 7.4%) in Hornsby Shire.

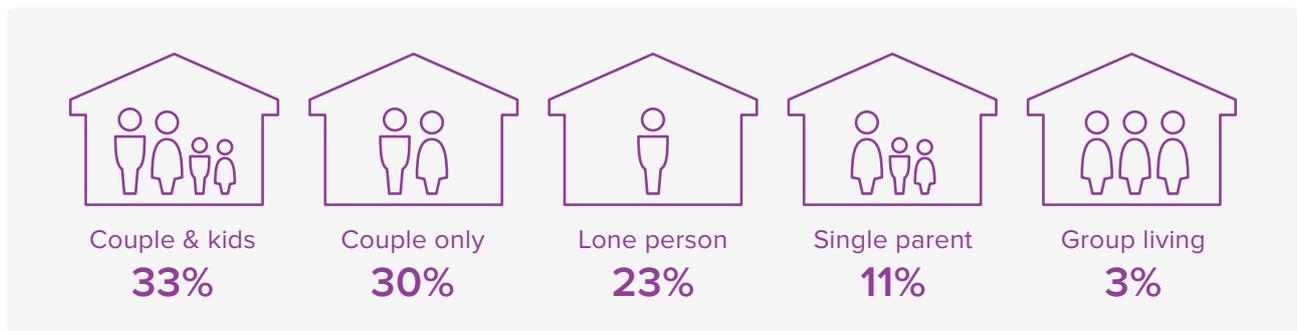
% of secondary school age children



Generation Z, these children, teenagers and university students who were born between 1995 and 2009 are the children of Generation X. Gen Z comprise 1 in 5 Australians and are the first fully global generation, shaped in the 21st century, connected through digital devices, and engaged through social media. They are digital integrators, utilising technology in how they shop, play, learn, interact, communicate, and build communities. They are also content creators and self-directed learners, empowered by having access to every piece of information within a few clicks of a button.

The most common household type in Australia is the couple and kids household (33%), followed by the couple only household (30%). The fastest growing household type is the lone person household, currently making up a quarter of households (23%). By 2036 the couple and kids household will be exceeded by couple only households and lone person households.

Household types



8

A home for families and the next generations

In the 20 years of their lifespan Gen Zs have seen more change than any cohort before them. They began life when Australia's birth rate was declining and hit its lowest ebb in history (2001) yet are now being shaped in a time of record annual births, exceeding 310,000 per year. They began their life in the internet era but are being shaped in the world of social media. While the PC era dominated their birth years, the social media, app and mobile device era is transformative today. The confluence of these changes has so transformed their society that the world of Gen Zs is radically different to the times that shaped their parents and unrecognisable to the world their grandparents first knew.

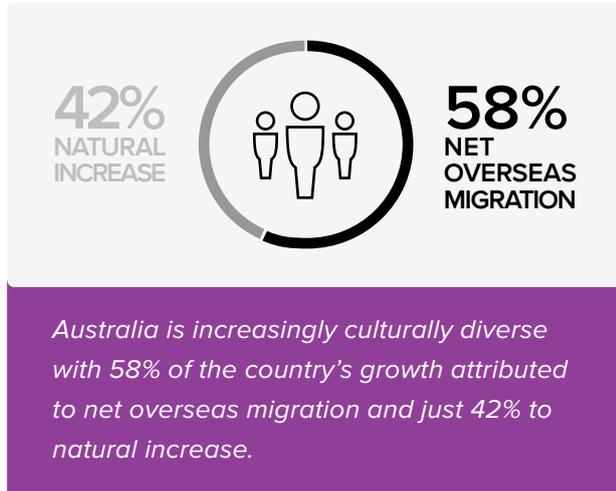
Only occasionally in history do massive demographic changes combine with huge social shifts, ongoing generational transitions and unprecedented technological innovation so that within the span of a decade society altogether alters. Hornsby Shire is currently in the midst of one such transformation.

A new baby boom



Today's baby boom is twice as large (exceeding 310,00 annual births) than when the original baby boom began in 1946 (less than 150,000 annual births).

Population growth



Amidst massive national and global change, the Aussie spirit is alive and growing in the 21st Century and what it means to be Australian has morphed to meet the diversity of our changing times. With 1 in 4 Australians born overseas and 46% of households having at least one parent born overseas, our cities are more culturally diverse than ever.

Australia's region of Asia is home to 60% of the global population and the fastest growing nations on earth.

China, India, Vietnam and the Philippines are all in the top 7 birth countries of Australians born overseas.

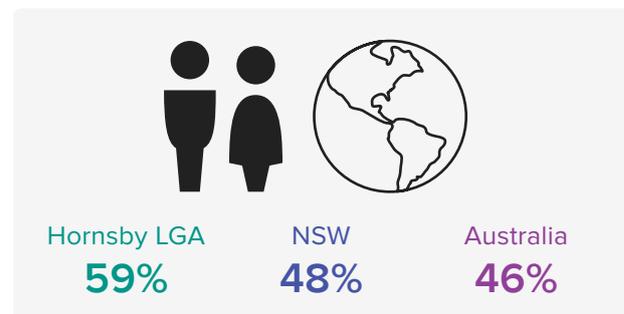
Hornsby Shire is particularly culturally diverse, with residents more likely to have been born overseas than the average populations of Greater Sydney, NSW and Australia nationally (35% compared to 34%, 26% and 25%, respectively). Over a third (35%) of the Hornsby Shire population are born overseas, increasing from 32% in 2006.

% born overseas



Residents of Hornsby Shire are also more likely to have one or both parents who have been born overseas. More than half of (59%) Hornsby Shire residents have at least one parent who was born overseas compared to 46% of Australians nationally.

% with one or both parents born overseas



Top 3 languages other than English

1.	Cantonese	5%
2.	Mandarin	5%
3.	Korean	3%

The top three languages spoken by Hornsby Shire residents other than English are Cantonese (5%), Mandarin (5%) and Korean (3%). There is a greater proportion of households who speak other languages, with just 7 in 10 Hornsby Shire residents (69%) only speaking English at home compared to 77% of Australians nationally.

This cultural diversity in areas such as Hornsby Shire has paved the way for Australia to become a regional hub across Asia and is in its own right a globally connected, business influencer, cultural exporter and regional leader. The “cultural cringe” has given way to sophistication, cultural diversity and global influence. Australians hold strongly to an identity and “Aussie values” and these have become more nuanced in a world of global interactions.

Greater Sydney: White Pages 2015 Top 10 Surnames

1. SMITH (Anglo)
2. LEE (Chinese/Anglo)
3. NGUYEN (Vietnamese)
4. JONES (Anglo)
5. KIM (Korean)
6. CHEN (Chinese)
7. WILLIAMS (Anglo)
8. BROWN (Anglo)
9. WANG (Chinese)
10. LI (Chinese)

The ABS Census data shows that Australians identify with more than 300 different ancestries, and Sydney is the most culturally diverse city in Australia. One of the best indicators of ancestry is family name and the latest Sydney white pages Top 10 surnames data shows that the traditional “Smith, Jones and Williams” list has changed demonstrating the diversity of 21st Century Sydney.

Hornsby Shire lives up to its Bushland Shire moniker with two-thirds of the total land area comprised of National Parks and reserves². Major national parks featured in the Shire include Ku-ring-gai Chase, Berowra Valley Regional Park, Marramarra, Lane Cove National Park and Muogamarra Nature Reserve³. Additionally the Shire contains more than 184 parks and 137 playgrounds and the sports facilities are extensive and include 40 sportsground complexes, 42 netball courts, 72 tennis courts, two BMX facilities, five skate parks, three aquatic centres, and one indoor recreation centre. The Hornsby Shire also has 31 community centres and five libraries, facilitating the growth of arts and culture in the area.

60% of Australians and 61% of NSW residents participate in sport and physical recreation. The most popular form of physical exercise amongst Australians is walking at (19%), closely followed by going to the gym or fitness (17%).

Whilst Gen Zeds (aged 15-17) are the generation who most participate in physical recreation and sport in Australia, their participation is on the decrease from 78% to 74% between 2011-12 and 2013-14.

There are three major town centres, Hornsby, Carlingford and Pennant Hills with 37 smaller town centres, further facilitating the opportunity for retail and trade in the Hornsby Shire.

The average street in the Shire, if it contained 100 households is home to 290 people (compared to 263 people on the average Australian street), around 200 cars, 50 dogs and 30 cats. On this average street there would be 3.5 births per year and 1.4 marriages per year. The average resident stays longer in the Shire than the Sydney average, testament to the lifestyle, enjoyment and connection to life in Hornsby Shire.

² <http://profile.id.com.au/hornsby/about>

³ <http://www.hornsby.nsw.gov.au/my-lifestyle/sports-and-recreation/parks-and-playgrounds>

Changing household structure



By 2020, for the first time in our history the couple only household will be more common than the couple with kids household. The solo person household is the fastest growing household type and will move from 23% to 27% by 2020.

The mega-trends identified in this report deliver a snapshot of Hornsby Shire over the decade ahead. It shows an area with a highly educated, entrepreneurial, stable workforce. It is home to a community of diverse cultures and generations travelling widely while connecting locally. And it highlights the emerging trends of living –

a bushland shire and an urbanised, cosmopolitan shire. The future of some of the more densified areas in the shire will be of public-transport utilising, café-culture embracing, walkable communities adjoining the more typical suburban leafy streetscapes home to the nuclear families and emerging multigenerational households.

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