



YOUR VISION.
YOUR FUTURE.

**Economic
Development
and Tourism
Strategy
2021-2026**





LET'S SHAPE
THE HORNSBY
OF TOMORROW.

Contents

Prepared For:

Hornsby Shire Council

Consultant

SC Lennon & Associates Pty Ltd

ACN 109 471 936

ABN 74 716 136 132

Disclaimer

This report has been prepared by SC Lennon & Associates Pty Ltd on behalf of Hornsby Shire Council. It has been prepared on the understanding that users exercise their own skill and care with respect to its use and interpretation. Any representation, statement, opinion or advice expressed or implied in this publication is made in good faith. SC Lennon & Associates Pty Ltd and the individual authors of this report are not liable to any person or entity taking or not taking action in respect of any representation, statement, opinion or advice referred to above.

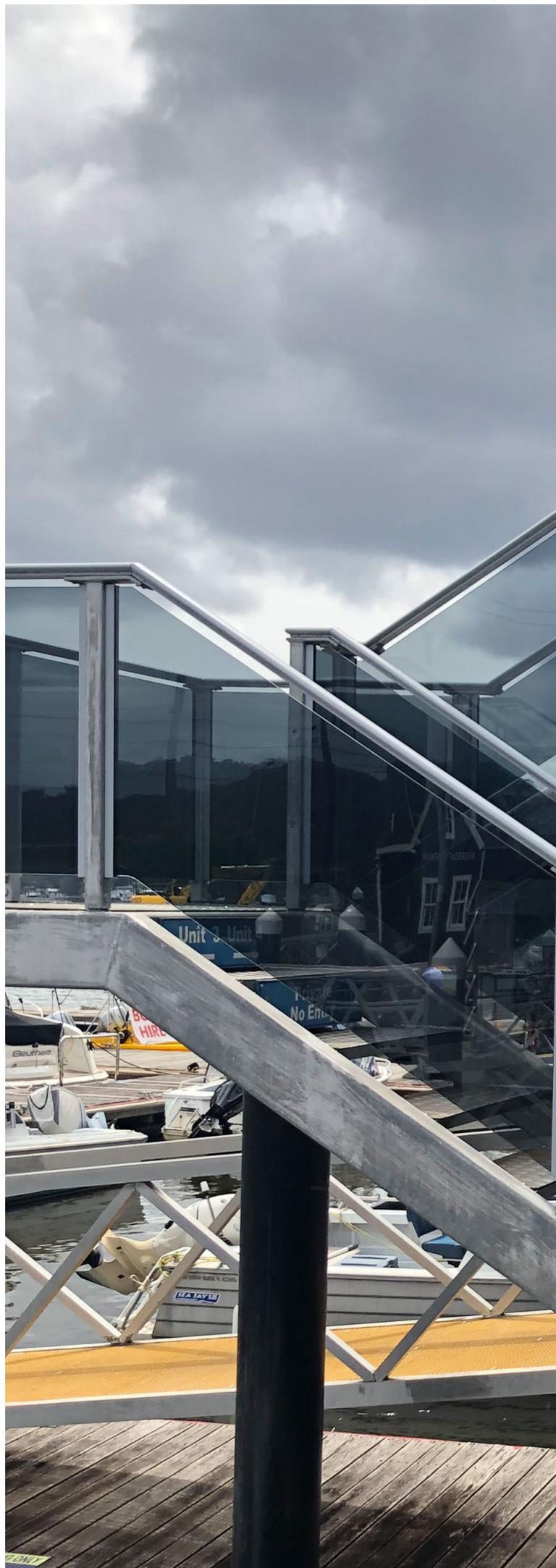
Image sources: Destination NSW, Flickr, SC Lennon & Associates and Hornsby Shire Council.

Council recognises the Traditional Owners of the lands of Hornsby Shire, the Darug and Guringai peoples, and pays respect to their Ancestors and Elders past and present and to their Heritage. We acknowledge and uphold their intrinsic connections and continuing relationships to Country.

Executive Summary	6
A Framework to Promote a Productive Hornsby Shire	6
Building on Our Strengths and Opportunities	6
A Collaborative and Coordinated Approach	6
Vision and Charter for Economic Development and Tourism	7
Economic Development and Tourism Strategy Themes	7
Collaborative Partnerships for Effective Strategy Implementation	9
The Immediate Challenge of COVID-19: An Economic Recovery Plan	9
Monitoring Strategy Progress	9
Introduction	10
1.1 Economic Development and Tourism Strategy Objectives	10
1.2 A Focus on the Enablers of Economic Development and Tourism	12
1.3 The Immediate Challenge: COVID-19	12
1.4 Addressing COVID-19: An Economic Recovery Plan	13
1.5 A Strategic and Informed Approach to Economic Development	14
1.6 Strategic Alignment	14
1.7 Collaboration for Growth and Prosperity	15
Challenges and Opportunities for a Productive Hornsby Shire	16
2.1 Lifestyle and Liveability – Population and Location	16
2.2 The Importance of Productive, Vibrant and Connected Places	20
2.3 Hornsby Shire's Small Business Profile	20
2.4 Local Business Capacity	20
2.5 Small Business 'Workspace' Infrastructure	21
2.6 Opportunities for Smart and Innovative Economic Development	22
2.7 Tourism Product and Visitor Economy Infrastructure	22
2.8 Tourism Marketing and Promotion	26
The Hornsby Shire Economy	26
3.1 Business and Employment Profile	26
3.2 Local Employment Capacity	27
3.3 Industry Value-Added	29
3.4 Tourism Profile	30
3.5 Employment Location Quotients	31
3.6 Industry Growth / Share	32
3.7 The Impacts Of COVID-19	34
3.8 Hornsby Shire's 'Focal' Industries	36
A Framework for Promoting a Productive Hornsby Shire	37
4.1 Hornsby Shire's Economic Development and Tourism Vision	37
4.2 Hornsby Shire Council's Economic Development and Tourism Charter	37
4.3 Hornsby Shire Council's 'Core' Economic Development and Tourism Activities	38
4.4 Economic Development and Tourism Strategy Themes	39
4.5 Economic Development and Tourism Strategy Action Plan	42
Theme 1: Connected Hornsby Shire	42
Theme 2: Smart and Innovative Hornsby Shire	44
Theme 3: Destination Hornsby Shire	46
Strategy Implementation	48
5.1 Priorities for Action	48
5.2 Collaborative Partnerships for Effective Strategy Implementation	48
5.3 Immediate Priority: COVID-19 Economic Recovery Plan	49
5.4 Monitoring Strategy Progress	49
References	50

List of Figures

Figure 1 – Strategic Alignment: Economic Development and Tourism Strategy	7
Figure 2 – Hornsby Shire Council’s ‘Three Themes’	8
Figure 3 – The Enablers of Hornsby Shire’s Economic Development	12
Figure 4 – Strategic Alignment: Economic Development and Tourism Strategy	14
Figure 5 – Hornsby Shire Economic Development and Tourism Strategy Partners	15
Figure 6 – Employment by Industry, Hornsby Shire, 2017/18	27
Figure 7 – Number of Registered Businesses by Industry, Hornsby Shire, 2018	27
Figure 8 – Employment Capacity by Industry, Hornsby Shire, 2017/18	28
Figure 9 – Value-Added by Industry, Hornsby Shire, 2017/18	29
Figure 10 – Value of Tourism and Hospitality, Hornsby Shire and NSW, 2016/17	31
Figure 11 – Employment Location Quotients, Hornsby Shire to NSW, 2017/18	32
Figure 12 – Industry Employment Growth-Share (Selected Industries), Hornsby Shire to NSW, 2012/13 to 2017/18	33
Figure 13 – COVID-19 Impacts on Jobs and GRP, Hornsby Shire, Greater Sydney, NSW and Australia, June 2020	34
Figure 14 – COVID-19 Impacts on Industry Value-Added, Hornsby Shire, June Quarter 2020 Compared to 2018/19 Quarter Average.	35
Figure 15 – Hornsby Shire’s ‘Focal’ Industries	36
Figure 16 – Hornsby Shire Council’s ‘Core’ Economic Development and Tourism Activities	38
Figure 17 – Economic Development Strategy Planning Framework	40





Executive summary

A Framework to Promote a Productive Hornsby Shire

The Economic Development and Tourism Strategy, 2021-2026 has been prepared to provide Hornsby Shire Council, in its role as a promoter and a facilitator of economic development, with a high-level plan of action to support the vibrancy, diversity and sustainability of the Hornsby Shire Council area.

In light of the COVID-19 pandemic affecting cities and regions throughout Australia and around the world, the need to understand the local impacts on business and industry and to develop appropriate responses to help promote and support economic development is perhaps more important than ever before.

The Economic Development and Tourism Strategy, 2021-2026 has been developed based on extensive desktop research and in depth, targeted stakeholder consultation and analysis. It presents a plan of action that builds on the Shire's existing strengths to stimulate, support, attract and maintain business activity in Hornsby Shire.

Council has engaged with key stakeholders to establish a new vision and framework for promoting and facilitating economic development and tourism activity into the future. It is noted however, that this Strategy is Council's first economic development strategy since 2011. As such, many actions and ideas for action are, by necessity, foundational and these actions should be addressed in the first instance. The completion of these actions and initiatives will be dependent upon the availability of Council's resourcing and budget. To this end, priority initiatives will be identified in the annual Operational Plan.

Where possible, Council will realise opportunities through alternate funding pathways by working in collaborative partnerships and applying for grants. Otherwise, key foundational services and initiatives will not be progressed.

Building on Our Strengths and Opportunities

The analysis informing this strategy shows that those industries with existing relative strengths or prospects for growth, and which present opportunities for further investigation in Hornsby Shire, include education and training, health care, professional and financial services, the arts and creative industries and tourism, including sports and recreation-based tourism and events. Other population-driven industries, like retail trade and construction are important employers which are reliant on the economic drivers for their own sustainability and growth.

A Collaborative and Coordinated Approach

The Economic Development and Tourism Strategy defines Council's role in promoting and facilitating economic development and tourism. It focuses outcomes on Council's activities as an 'enabler' of economic development, where it can use its planning and regulatory functions, its resources and its collaborative relationships with other organisations to help stimulate investment, attract new residents, encourage the growth of existing businesses and support the local visitor economy through effective promotion and destination management.

The Economic Development and Tourism Strategy aligns with the strategic objectives articulated in Hornsby Shire Council's Community Strategic Plan and, along with other plans and strategies being developed by Council, it provides key input to the Local Strategic Planning Statement (LSPS) for Hornsby Shire as shown in Figure 1. It will be implemented by Hornsby Shire Council in partnership with the NSW Government, the Australian Government, key institutions, business and industry and supporting partners across the Shire and region within the context of available resources.

The Economic Development and Tourism Strategy provides the framework for Hornsby Shire Council to affect change and promote economic development through the implementation of workable, practical actions. It articulates and promotes a partnership approach between Council and other stakeholders in government, the non-government sector, the community and industry.

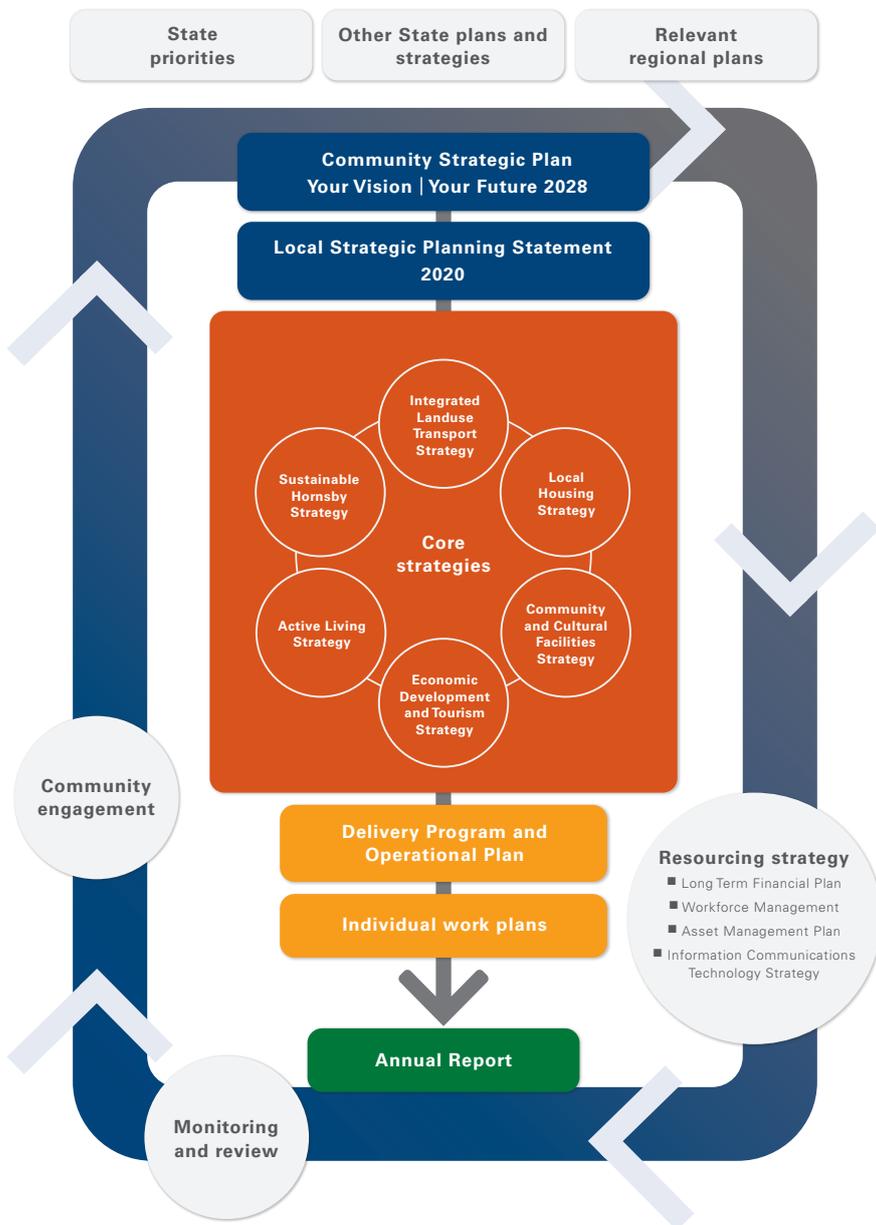


Figure 1 – Strategic Alignment: Economic Development and Tourism Strategy

Hornsby Shire Council’s role is to work with all sectors of the community and industry to help promote the Shire as an attractive destination for people to live, work and play.

By informing a strategic and targeted approach to economic development, this strategy provides Council and its partners with the tools to influence the factors that facilitate the resilience, competitiveness and success of local businesses and the capacity of the Shire to attract new investment, grow the economy and create jobs.

Vision and Charter for Economic Development and Tourism

The Economic Development and Tourism Strategy, 2021-2026 is informed by socio-economic research and analysis and targeted stakeholder consultation. The strategic themes and directions reflect stakeholder views regarding the Shire’s issues, challenges and opportunities, which combined, inform the vision for economic development.

Hornsby Shire Economic Development and Tourism Vision

Building on the superb natural environment and driven by innovation and sustainability in a diversity of industries, Hornsby Shire is a vibrant and connected business and employment hub, and a location of choice for visitors, for investment, for learning and for living.

The vision is supported by Hornsby Shire Council’s economic development and tourism charter which describes Hornsby Shire Council’s commitment to promoting, facilitating and co-ordinating economic development and tourism activities.

Hornsby Shire Council’s Economic Development and Tourism Charter

Hornsby Shire Council supports economic development through sound planning, information-sharing and collaborative partnerships, to help attract visitors, promote new investment, encourage local businesses to flourish in town centres in particular and cultivate Hornsby Shire’s appeal as a place to live, learn and prosper.

Guided by its economic development and tourism charter and the action plan presented in this strategy, Hornsby Shire Council provides the enabling environment to help facilitate the competitiveness and success of businesses across all sectors of the local economy.

Economic Development and Tourism Strategy Themes

The Economic Development and Tourism Strategy documents opportunities for Hornsby Shire Council and its partners in government, the non-government sector, industry and the community to address collaboratively, to help facilitate change towards a prosperous future for Hornsby Shire and the wider region. There are three strategic themes shown in Figure 2. A total of 39 individual opportunities for action have been identified and categorised under the three strategic themes. These are opportunities that Council and its partners can focus on to help activate and grow the local economy. From the long-list of actions identified in this strategy, the following five are Council’s priority actions to be progressed over the first 12 to 24 months of this strategy:

1. Undertake a survey of small and home-based businesses to better understand the composition and needs of this sector.
2. Commence the development of a Smart Cities Strategy in conjunction with the ICT Strategy. Ensure that the Strategy meets place making requirements and addresses the needs of business.
3. Develop a Destination Management Plan for River and Rural Communities in conjunction with industry partners.
4. Progress an approach to developing a night-time economy in the Hornsby Town Centre.
5. Develop a strategic approach to enhancing business resilience in the Shire, including the drafting of a Disaster Recovery Plan.

Priorities will be reviewed on a year-to-year basis as resources become available taking into account Council’s commitment to place management, place making and place planning activities.

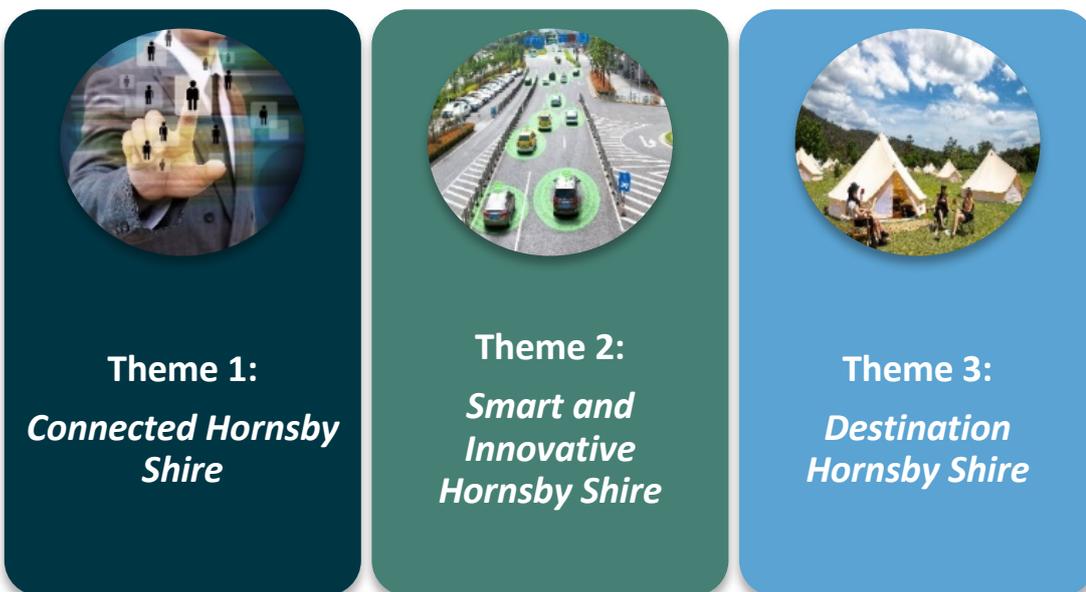


Figure 2 – Hornsby Shire Council’s ‘Three Themes’

Collaborative Partnerships for Effective Strategy Implementation

Collaborating to cultivate economic development partnerships is key to successful strategy implementation. The Economic Development and Tourism Strategy will be implemented by Hornsby Shire Council in partnership with the NSW Government, the Australian Government, regional development bodies, business and industry and other supporting partners. The Shire's businesses and residents will continue to be engaged at a partnership level to ensure effective collaboration for the delivery of the Shire's economic development agenda.

The Immediate Challenge of COVID-19: An Economic Recovery Plan

In delivering this Economic Development and Tourism Strategy, Hornsby Shire Council is focussed first and foremost on immediate-term initiatives to help address the impacts of COVID-19 on local businesses and the community, and with a longer-term view to strategies and actions that will help to enable and facilitate Hornsby Shire's economic development in a post-pandemic world. These immediate-term initiatives, which are designed to assist economic recovery, include:

- Providing local businesses with information on and access to services offering support for planning through adversity – including financial counselling, business continuity management, human resource management, taxation support, mental health support, etc. This includes support available through, for example, Business Connect, via the support services of Realise Business, through referrals to business training / re-training courses offered by Hornsby Ku-Ring-Gai Community College, Hornsby TAFE and via the networking and referral services offered by RDA Sydney.
- Supporting the initiatives of other organisations such as Northern Sydney Regional Organisation of Councils (NSROC), which is undertaking a survey of businesses in the region to better understand the impact of COVID-19, to inform business advocacy needs.
- Supporting local businesses by leveraging off the work of the Small Business Commissioner to investigate and promote local procurement options.
- Supporting local business start-ups and expansions by continuing to work to ensure (and promote) a supportive and enabling regulatory environment.
- Through its role as a local leader, restoring business confidence (and community confidence) by broadcasting positive messages about Hornsby Shire's

economic recovery and local initiatives that are designed to support the recovery effort.

These initiatives are being delivered in the context of a longer-term strategic framework for economic development and tourism promotion and facilitation.

Monitoring Strategy Progress

The Economic Development and Tourism Strategy, 2021-2026 has been prepared in the context of the role of economic development in Hornsby Shire Council's broader program of work and strategic objectives, and wider regional priorities.

Where appropriate, Council will monitor the progress of the Economic Development and Tourism Strategy in order to achieve the prioritised and funded actions set out, noting that not all actions will be funded for delivery.

Set performance measures will be established using a range of indicators and will be reported annually when an action is to be undertaken. The Economic Development and Tourism Strategy, 2021-2026 will be reviewed annually with an update anticipated in five years.

Introduction



‘Economic development’ refers to the continuous process of growing an area’s level of income and capital (wealth) and distributing that wealth (through local expenditure and jobs) to the community.



1.1 Economic Development and Tourism Strategy Objectives

The Economic Development and Tourism Strategy, 2021-2026 has been prepared to provide Hornsby Shire Council, in its role as a promoter and a facilitator of economic development, with a well-articulated plan of action to support the vibrancy, diversity and sustainability of the Hornsby Shire Council Local Government Area.

In light of the COVID-19 pandemic affecting cities and regions throughout Australia and around the world, the need to understand the local impacts on business and industry and to develop appropriate responses to help promote and support economic development is perhaps more important than ever before. Informed by a well-developed understanding of the Shire’s current economic development and tourism status and performance, the Economic Development and Tourism Strategy, 2021-2026 provides Council with a framework to guide and facilitate local economic development and tourism now and into the future.

Informed by desktop research and targeted stakeholder consultation and analysis, the strategy presents a five-year plan of action that builds on the Shire’s existing strengths to stimulate, support, attract and maintain business activity in Hornsby Shire. In preparing the strategy, Council has engaged with key stakeholders to establish a new vision and framework for promoting and facilitating economic development and tourism activity into the future.

‘Economic development’ refers to the continuous process of growing an area’s level of income and capital (wealth) and distributing that wealth (through local expenditure and jobs) to the community. Ultimately, economic development is about improving living standards and quality of life, or, to capture the concept in a single word, it is about prosperity.

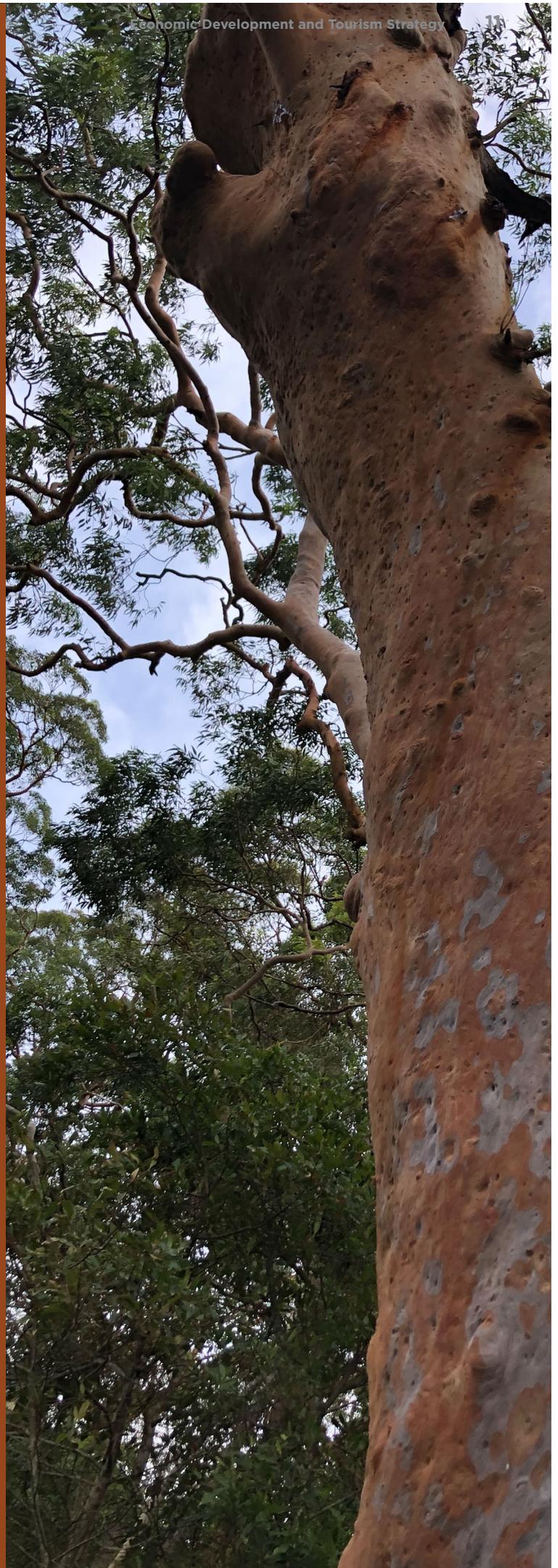
The broad objectives of the Economic Development and Tourism Strategy include increased employment opportunities; new industry development; growth and retention of existing business; the attraction of new residents; and increased visitation activity. To this end, the strategy delivers the following:

- It establishes a detailed understanding of Hornsby Shire’s current economic development and tourism status and performance.
- It articulates economic development issues, challenges and opportunities for Hornsby Shire Council to consider in its role as a facilitator and promoter of economic development and tourism.

- It identifies collaborative partnerships, where Hornsby Shire Council can engage with other stakeholders on matters concerning local and regional economic development and tourism in the Hornsby Shire area and surrounds.
- It provides Hornsby Shire Council with guidance to develop an informed, clear, actionable and achievable 'road map' for economic development and tourism.

In light of the economic impacts of COVID-19 and with a longer-term view to a post-pandemic world, the Economic Development and Tourism Strategy defines Council's role in promoting and facilitating economic development and tourism.

Specifically, it focuses outcomes on Council's activities as an 'enabler' of economic development, where it can use its planning and regulatory functions, its resources and its collaborative relationships with other organisations to help stimulate investment, attract new residents, encourage the growth of existing businesses and support the local visitor economy through effective promotion and destination management.



1.2 A Focus on the Enablers of Economic Development and Tourism

While business and industry drive economic growth and development, local and regional government bodies like Hornsby Shire Council directly influence the ‘enabling environment’ for growth and prosperity.

These ‘enablers’ refer to the services, infrastructure and support mechanisms required to facilitate economic activity and include physical infrastructure; appropriately zoned and protected urban and industrial land; the urban form and function of Hornsby Shire’s activity centres; community services and facilities; and local ‘lifestyle’ attributes such as parks and recreational facilities.

The enablers of economic development (Figure 3) also include things like regional transport and communications infrastructure; education infrastructure and workforce skills; research and innovation infrastructure which supports business innovation; and a supportive regional planning framework.

Together, these factors define Hornsby Shire’s economic development potential and its appeal as a place to visit, work, live and invest in. Understanding how Council can effectively influence the enablers of economic development is key to the preparation and implementation of a visionary, yet practical and outcomes-oriented Economic Development and Tourism Strategy.

1.3 The Immediate Challenge: COVID-19

According to the Reserve Bank of Australia (RBA), the current outlook for the Australian and global economies is being driven by the COVID-19 pandemic. The necessary social distancing restrictions and other containment measures that have been put in place to control the virus in Australia’s cities and regions have resulted in a significant contraction in economic activity.

At a local level, these unprecedented social and economic impacts mean the need to articulate and guide Hornsby Shire Council’s role in supporting,



Figure 3 – The Enablers of Hornsby Shire’s Economic Development. Source: SC Lennon & Associates

promoting and facilitating economic development and tourism activity is perhaps more important than ever before.

The Australian Bureau of Statistics (September 2, 2020) reported that Australia's Gross Domestic Product (GDP) fell 7.0 per cent in the June quarter 2020, the largest quarterly fall on record. According to the RBA, in line with the economic contraction, total hours worked are expected to decline by around 20 per cent and the unemployment rate is forecast to rise to around 10 per cent in the June quarter. (At the time of writing, the latest available unemployment figures from the Australian Labour Force Survey (March quarter 2020) had not been impacted by COVID-19. There will no doubt be a commensurate increase in unemployment across Australia's regions and locales, including the Hornsby Shire.

The economic outlook beyond the June quarter 2020 will be shaped by the extent to which activity and the labour market continues to be affected by social distancing and other containment restrictions, which in turn will be determined by what is necessary to manage the health aspects of the current crisis. Other factors that will be important are the responses of households and businesses to changes in the economic environment, and the effectiveness of policy support, including at the local government level.

COVID-19 has negatively affected the Australian economy by disrupting consumer demand and business supply. Consumer sentiment has deteriorated significantly, weakening demand across most industries. Households have scaled back discretionary spending due to fears relating to rising unemployment and economic uncertainty.

Many businesses have abandoned or postponed investment in new productive capacity to retain cash and provide a liquidity buffer to survive the pandemic. Supply chain disruptions in Australia, and in foreign markets have also hindered business activity, further dampening economic growth.

According to IBISWorld (July 2020), while Australia has been relatively successful in containing COVID-19 compared with other regions, supply chain disruptions, and ongoing travel and tourism restrictions continue to hinder economic activity. Those industries that are expected to be most adversely affected by the aftermath of COVID-19 include manufacturing, mining, agriculture, some store-based retailing and the accommodation and food services sector (including tourism operators).

Despite the adverse economic impacts, some sectors are expected to outperform during the COVID-19 pandemic. Social distancing has pushed many consumers to online

channels for shopping, communication, food purchases and working arrangements. This trend has driven a surge in sectors such as online shopping, postal services, and data storage services. Other industries have suffered direct negative effects, but have also seen positive factors, such as rising demand for repairs and maintenance services replacing new purchases.

It is plausible that the current economic disruption will have some long-lasting effects, not only because it will take some time to restore workforces and re-establish businesses but also because it could also affect mindsets and the behaviours of consumers and businesses. This could result in structural change in the economy. Changes in the financial position of households and businesses could also have long-lasting effects.

1.4 Addressing COVID-19: An Economic Recovery Plan

In delivering this Economic Development and Tourism Strategy, 2021-2026 Hornsby Shire Council is focussed first and foremost on immediate-term initiatives to help address the impacts of COVID-19 on local businesses and the community, and with a longer-term view to strategies that will help to enable and facilitate Hornsby Shire's economic development in a post-pandemic world.

These immediate-term initiatives of Council, which are designed to assist economic recovery in the short-term include:

- Providing local businesses with information on and access to services offering support for planning through adversity – including financial counselling, business continuity management, human resource management, taxation support, mental health support, etc. This includes support available through, for example, Business Connect, via the support services of Realise Business, through referrals to business training / re-training courses offered by Hornsby Ku-Ring-Gai Community College, Hornsby TAFE and via the networking and referral services offered by RDA Sydney.
- Supporting the initiatives of other organisations such as Northern Sydney Regional Organisation of Councils (NSROC), which is undertaking a survey of businesses in the region to better understand the impact of COVID-19, to inform business advocacy needs.
- Supporting local businesses by leveraging off the work of the Small Business Commissioner to investigate and promote local procurement options.
- Supporting local business start-ups and expansions by continuing to work to ensure (and promote) a supportive and enabling regulatory environment.

- Through its role as a local leader, restoring business confidence (and community confidence) by broadcasting positive messages about Hornsby Shire’s economic recovery and local initiatives that are designed to support the recovery effort.

These initiatives are being delivered in the context of a longer-term strategic framework for economic development and tourism promotion and facilitation.

1.5 A Strategic and Informed Approach to Economic Development

This Strategy provides the framework for Hornsby Shire Council, both as a lead and in partnership with other organisations, to plan for the economy of the future.

By capitalising on the Shire’s comparative and competitive economic advantages, Council’s economic development promotion and facilitation activities – through its regulatory and land use planning functions and its investment attraction, business liaison and advocacy efforts – will define Hornsby Shire’s economic potential and its appeal as a place to visit, work, live and invest in.

Also fundamental to shaping the Shire’s economic future will be the influence and impact of broader (global) economic trends and prospects. Technological, social and economic disruptions that are either already occurring, or which we can expect to see in the near future, will have a bearing on the sort of industries and jobs we can expect to see in Hornsby Shire and the wider region in the next 30 years.

Understanding where the economy has come from and how it is already evolving (e.g. as a developing visitor destination or a lifestyle location for creatives, professionals and other knowledge workers) helps to inform ways in which Hornsby Shire Council, together with key agencies at the regional level, can influence the enablers of economic development and accommodate a preferred economic future in line with Council’s vision and the community’s values as articulated in the Hornsby Shire Community Strategic Plan 2018-2028.

1.6 Strategic Alignment

Productive Hornsby Shire aligns with the strategic objectives articulated in Hornsby Shire Council’s Community Strategic Plan and, along with other plans

and strategies being developed by Council, it provides key input to the Local Strategic Planning Statement (LSPS) for Hornsby Shire.

The LSPS is a document that sets out a 20-year vision for land use in the local area, the special character and values that are to be preserved, shared community values and how Council will manage growth and change. The LSPS aligns with the Greater Sydney Commission’s North District Plan and, by extension, the Greater Sydney Regional Plan. The strategic relationship between this Economic Development and Tourism Strategy, 2021-2026 and other key planning documents via the LSPS is illustrated in Figure 4

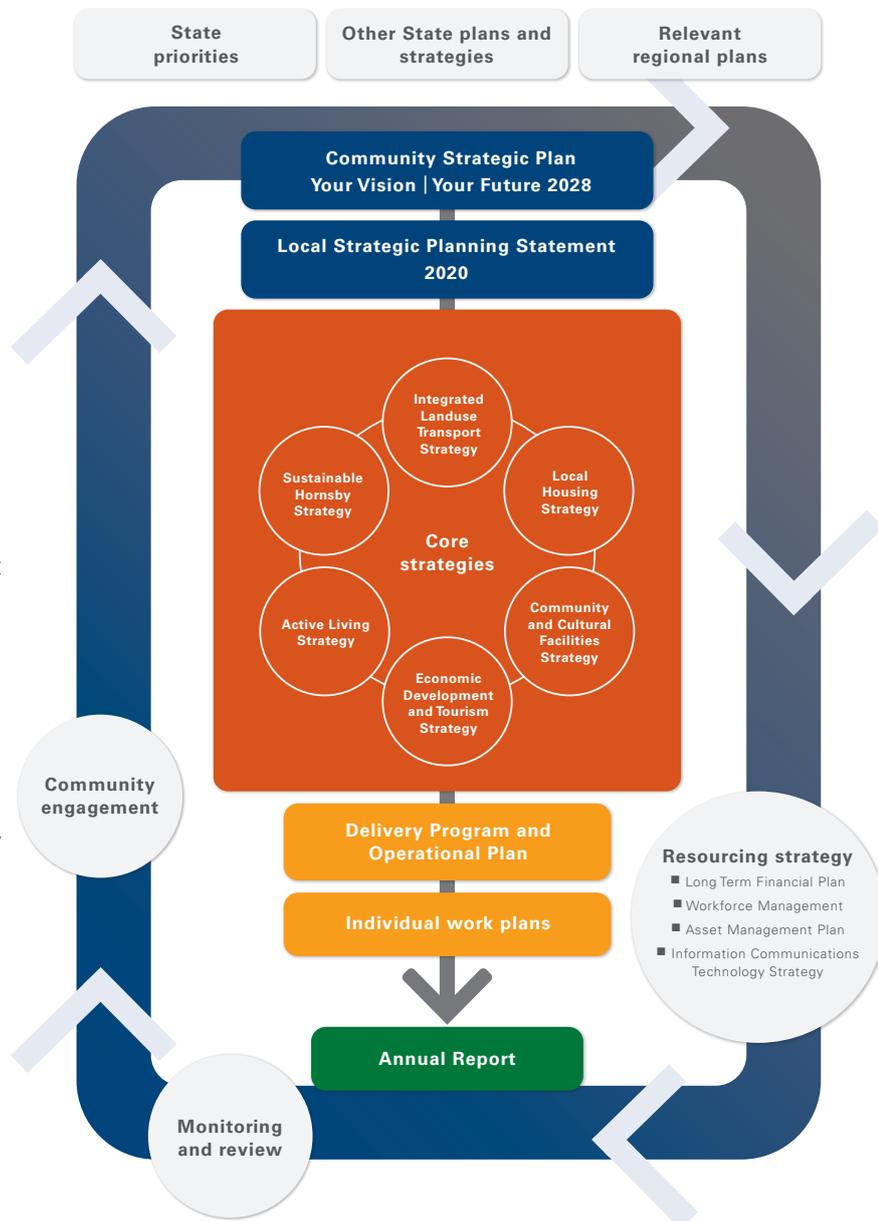


Figure 4 – Strategic Alignment: Economic Development and Tourism Strategy

The Economic Development and Tourism Strategy, 2021-2026 will be implemented by Council in partnership with the NSW Government, the Australian Government, key institutions, business and industry and supporting partners across the Shire and region. To ensure effective outcome delivery, the opportunities presented in this strategy respond to and align with the strategic objectives articulated in Council's Community Strategic Plan as well as key regional planning documents including the Greater Sydney Regional Plan and the North District Plan, as noted previously.

1.7 Collaboration for Growth and Prosperity

The Economic Development and Tourism Strategy, 2020-25 provides the framework for Hornsby Shire Council to affect change and promote economic development through the implementation of workable, practical actions. It articulates and promotes a partnership approach between Council and other stakeholders in government, the non-government sector, the community and industry as shown in Figure 5.

Hornsby Shire Council's role is to work with all sectors of the community and industry, as well as other key government agencies and institutions to help promote the Shire as an attractive destination for people to live, work and play.

By informing a strategic and targeted approach to economic development, this strategy provides Council and its partners with the tools to influence the factors that facilitate the resilience, competitiveness and success of local businesses and the capacity of Hornsby Shire to attract new investment, grow the economy and create jobs.

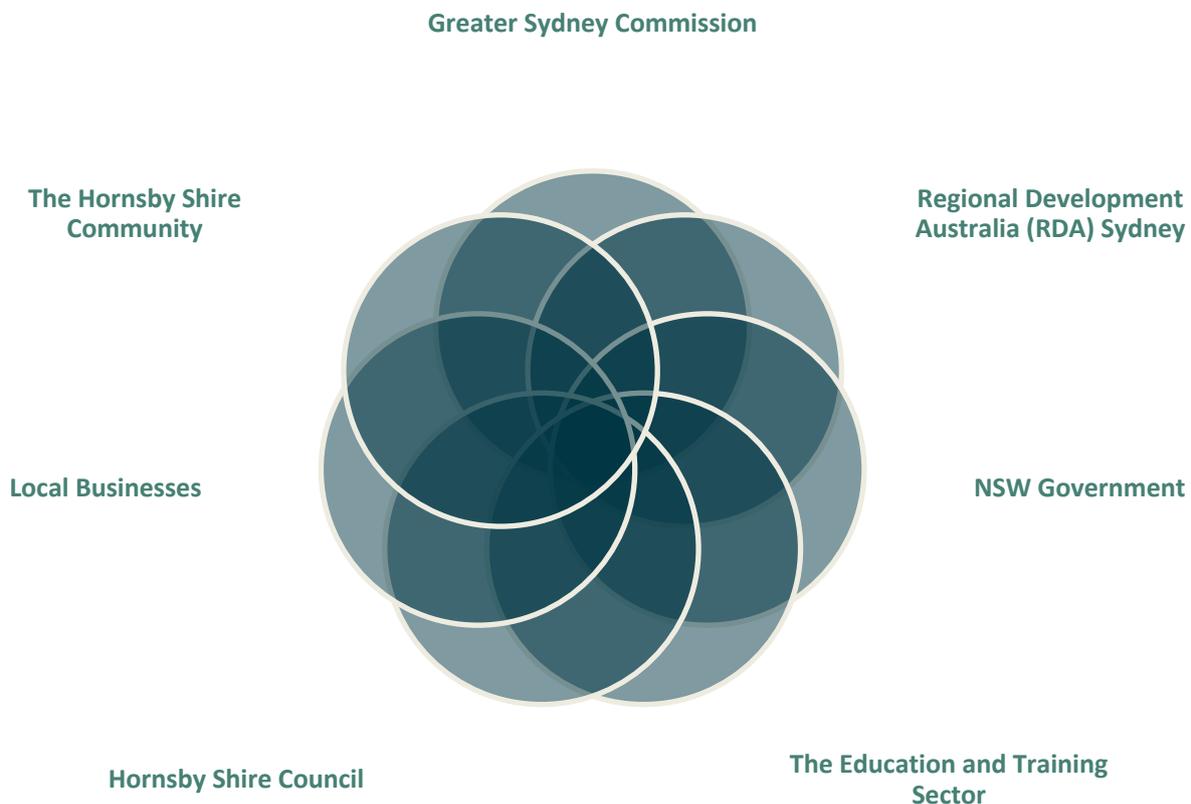


Figure 5 – Hornsby Shire Economic Development and Tourism Strategy Partners

Challenges and Opportunities for a Productive Hornsby Shire

In mid-2019, a number of selected stakeholders – both internal to Hornsby Shire Council and external – were consulted to gather informed views on pertinent economic development and tourism issues, challenges and opportunities for Hornsby Shire, in the broader metropolitan and NSW contexts. The outcome of the consultations coupled with the findings from complementary research and analysis is presented below.

These findings and observations are supported by socio-economic research and analysis (see Section 3), which was undertaken to help inform a vision for a productive Hornsby Shire and Council's charter for economic development and tourism. The research, consultation and analysis also inform the Economic Development and Tourism Strategy themes and actions presented in Section 4.

2.1 Lifestyle and Liveability – Population and Location

- Hornsby Shire, which has a diversity of both urban and peri-urban / rural communities, has a population of approximately 152,000. According to data from forecast.id (<https://forecast.id.com.au/hornsby>), Hornsby Shire's population forecast for 2020 is 155,927, and is expected to grow to 179,582 by 2036 (23,655 people or 16 per cent growth).
- Hornsby Shire's geographic location in Sydney's metropolitan north and only 50 kilometres from the Central Coast offers advantages that can be capitalised upon. For example, Hornsby is a transport hub and interchange and is on the commuter route from the Central Coast to the Sydney CBD.
- Connection to the city, the bush, the river and the recreational and lifestyle options that these elements afford is key to the quality of life in the Hornsby Shire.

Key Consideration: Transport NSW, Future Transport Strategy 2056

The NSW Government's transport plan as articulated in its Future Transport Strategy 2056, espouses a future where the vision for Greater Sydney as a metropolis of three cities will guide planning, investment and deliver customer outcomes. This includes faster, convenient and reliable travel times to one of the three cities or to the nearest strategic centre.

By 2056, economic and housing growth around Greater Sydney will drive integration across the city's hinterland, establish Gosford and Wollongong as 'satellite cities' and Newcastle, Canberra and the Gold Coast as 'global gateway cities' – the key entry points to NSW. Population and economic growth in these areas will require fast transit connections to Greater Sydney. Regional cities and centres will be connected to outlying towns and centres by a 'hub and spoke' network. They will be centres for health, education, and justice services as well as providing access to employment opportunities and air transport connections. Towns and villages will offer employment and housing and they will continue to be important in attracting domestic and international visitors, bringing job opportunities and economic benefits to rural communities.

For Hornsby, the Future Transport Strategy 2056 proposes a number of improvements to the metropolitan transport network that, if realised, would help enable economic development and tourism in Hornsby Shire. These include: Hornsby's role as a strategic transport corridor connecting with Central Coast and Newcastle; plans to address current transport network gaps between Hornsby and Parramatta through the City Shaping Network, the Greater Sydney Strategic Road Network and the City Serving Network; plans to improve freight transportation links through the Greater Sydney Strategic Freight Network; and plans to improve regional bicycle connections through the Greater Sydney Principal Bicycle Network.

Source: NSW Government, Transport for NSW (2018), Future Transport Strategy 2056



- Hornsby Shire has the potential to develop its profile and role in supporting the development of Greater Sydney as a '30-minute city' in line with Our Greater Sydney 2056 – North District Plan (March 2018).
- Hornsby Shire's transport infrastructure is good and includes North Connex (which is important for the positioning of Hornsby / access), two train lines and the Very Fast Train (VFT) station designated for Hornsby (Brisbane-Melbourne). However, public transport connections from the Central Coast could be improved, as could connections between Hornsby and Parramatta.
- According to economy.id, in 2016, 28 per cent of Hornsby Shire's resident workers were employed locally, meaning a large number of Hornsby's resident workforce (those workers who live in the Shire) travel to locations outside of the Shire (mainly the Sydney CBD) to work each day. This percentage would have changed substantially due to the impacts of COVID-19.
- Hornsby Shire's level of 'employment self-sufficiency' (the proportion of local workers holding a job in Hornsby Shire who also live in Hornsby Shire) is relatively low, at 47.5 per cent. Improving this metric could be a key goal of the Economic Development and Tourism Strategy.
- Housing in Hornsby Shire is comparatively more affordable than in Sydney, and anecdotal evidence indicates that younger people are moving to Hornsby from Sydney (as well as to the Central Coast and Wollongong) to take advantage of more affordable lifestyle opportunities.

Key Consideration: The North District Plan

The Greater Sydney Commission's North District Plan has adopted a range of objectives of particular relevance to economic development in Hornsby Shire, including internationally-competitive health, education, research and innovation precincts; investment and business activity in centres; industrial and urban services land is planned, retained and managed; and economic sectors are targeted for success.

The Plan sets out actions for a more productive region by driving opportunities for investment, business and jobs growth. It identifies a range of planning priorities under the heading 'productivity', including for strategic centres. Hornsby is identified as a strategic centre and the North District Plan makes recommendations to "strengthen Hornsby through approaches that:

- (a) encourage revitalisation of the commercial core;
- (b) better integrate Westfield Hornsby into the centre and make the area more attractive;
- (c) attract mixed-use development west of the railway line, encourage a stronger integration with the centre and encourage the development of a lively eat street and restaurant precinct;
- (d) unlock development potential of strata-constrained areas east of the centre;
- (e) support health-related land uses and infrastructure around Hornsby-Ku-ring-gai Hospital;
- (f) improve walking and cycling connections between Hornsby Station and the Hospital;
- (g) reduce the impact of traffic movements on pedestrians;
- (h) promote walking, cycling and public transport to and within the centre;
- (i) prioritise public domain upgrades, place-making initiatives and a new civic space."

Source: Greater Sydney Commission (March 2018), Our Greater Sydney 2056, North District Plan – Connecting Communities, p.75



2.2 The Importance of Productive, Vibrant and Connected Places

- Like many places, main street and centre retailing could be considered to be ‘struggling’ throughout Hornsby Shire’s centres. CBD revitalisation has been identified as a catalyst opportunity for Hornsby, including:
 - Strengthening the CBD as both a commuter hub and a destination;
 - More Council programming and activation of spaces;
 - Air space development opportunities over the railway;
 - Digital economy – incorporation of smart city tools;
 - Investment attraction opportunities;
 - Stronger linkages between the two sides of the rail line;
 - Developing a stronger night-time economy;
 - Providing for greater housing affordability; and
 - Potential to incorporate a university campus / presence.
- There are limited employment land development opportunities / strategic sites in Hornsby Shire. Existing industrial land needs to be maintained and managed. The Hornsby Employment Land Use Study notes that, considering the limited availability of industrial space in Hornsby Shire, there is an opportunity to allow for greater flexibility in design for industrial uses, maximising site cover to increase the capacity of industrial areas.
- There is no university institution located in Hornsby Shire, although it is relatively close to Macquarie University / Macquarie Park.
- The Hornsby Quarry redevelopment project (Hornsby Park) offers a new key passive and active recreational greenspace for the wider Hornsby Shire community. Access and mobility will be critical, particularly links to the Hornsby CBD.

2.3 Hornsby Shire’s Small Business Profile

- Data available from economy.id (<https://economy.id.com.au/hornsby>) shows that Hornsby Shire is home to around 14,250 businesses. Many of the Shire’s businesses are home-based businesses including what some have referred to as ‘mum-preneurs’ and ‘retire-preneurs’ who run small businesses while balancing other family or lifestyle commitments and who don’t

work to ‘normal’ business hours. (Note: Australian Bureau of Statistics’ data on counts of Australian businesses, published by economy.id (2019), shows that of Hornsby Shire’s approximately 14,250 businesses, around 60 per cent or 8,600 are non-employing businesses).

- While it is reported that there are many home-based businesses in Hornsby Shire, there is no detailed understanding of who these businesses are and what their needs are.
- Anecdotally, there is a prevalence of micro and home-based businesses involved in business services including finance professionals, information technology professionals, health professionals and ‘lifestyle and family products’, as well as construction (tradies).
- There is an opportunity for Council to take the lead in researching and collating data on the Shire’s home-based business profile through the administration of a local business survey.
- Hornsby Shire is also home to a number of larger businesses including manufacturers such as Wrigley’s, as well as pharmaceutical manufacturers.

2.4 Local Business Capacity

- Hornsby Shire is well represented by organisations and networks that represent and support small businesses. For example, RDA Sydney partners with ‘knowledge experts’ to connect small business with access to a range of business support services (e.g. export market development workshops). Opportunities exist for continued and greater collaboration between these networks in Hornsby Shire.
- Nevertheless, it is considered by some that many home-based and other micro or small businesses in Hornsby Shire need support, including to build capability around requirements such as finance, staffing, taxation, fair work legislation, licensing, insurance and general business planning. It was reported that many home-based businesses in Hornsby Shire need more formal business support networks.
- There is an opportunity to help grow the Hornsby Shire economy by focussing ‘enabling’ strategies on support for existing businesses. Hornsby Shire Council has a role to play in this regard through areas it has responsibility for such as planning and building regulations. The Easy To Do Business Program is a key element in responding to this theme. There is also an opportunity to establish a strategic, informed and targeted approach to investment attraction.
- There is potential for a greater uptake of small business training and support programs offered by the NSW

Government, for example, via Business Connect, via the support services of Realise Business, through referrals to business training courses offered by Hornsby Ku-Ring-Gai Community College and via the networking and referral services offered by RDA Sydney. Hornsby Shire Council could play a stronger role in connecting aspiring and existing business-owners with these services.

- There is an opportunity to leverage off the work of the Small Business Commissioner to investigate local procurement options.

2.5 Small Business 'Workspace' Infrastructure

- It was reported that some home-based businesses in Hornsby Shire require a commercial centre or 'business hub' to accommodate current needs and potential for growth. A co-working space has been widely touted as an opportunity to address this need. A co-working space was also raised as an opportunity to capture home-based and other business owners or workers from the Central Coast. Recent storm events have illustrated the value in having such an initiative within the Shire, as the privately-run facility in Thornleigh fulfilled an important function during power outages.
- For home-based businesses, a co-working space or business hub facility includes short-term workspaces, meeting spaces, opportunities for networking and support (flexible spaces) as well as a physical address. Such a facility could also have a community focus, including, for example, a Council service centre, access to industry-aligned business and employment training provided by Hornsby Ku-Ring-Gai Community College and community radio as the hub.
- In exploring the concept of any co-working space model, there needs to be a clear understanding of who the space is for and what their needs are. Working examples exist in the Greater Sydney area (e.g. Georges River, Penrith, Fairfield, The Hills Shire) that could provide learnings for Hornsby Shire, including in partnership approach to implementation.
- Various models of delivering co-working spaces to support micro and aspiring businesses could be explored, for example, Council leasing out the space to a private operator, perhaps in the Hornsby Town Centre. Any Council investment in a co-working space, business hub or similar facility would need to be in the broader public interest (a positive benefit-cost ratio) and any model put forward would also need to satisfy a commercial business case for it to be sustainable. Similarly, a curated model could be explored to build on the Shire's existing strengths.



2.6 Opportunities for Smart and Innovative Economic Development

- There are opportunities for Hornsby Shire Council to facilitate the development of an 'innovation ecosystem' within Hornsby Shire, including:
 - Facilitating the development of spaces and networks to support the growth of existing businesses and start-ups (e.g. the touted co-working space) – potentially in association with the Hornsby Park/ Quarry development.
 - Development of an education hub or precinct through partnerships with Hornsby Ku-Ring-Gai Community College, RDA Sydney and tertiary education institutions like TAFE, UTS, Macquarie University and the University of Western Sydney.
 - Linking to and potentially partnering with existing key infrastructure and agencies, including, for example, Hornsby Hospital, and investigating opportunities for a health precinct in the future.
- There is an opportunity to better define and articulate Hornsby Shire's unique offer / value proposition and focus on key industry sector strengths and opportunities, such as:
 - Health and social assistance;
 - Environment;
 - Government administration (e.g. a potential government hub in the Hornsby Town Centre);
 - Publishing and writing;
 - Food and agri-business; and
 - Community emissions reductions (e.g. electric vehicle charging stations and planning for these 'smart' facilities through Council's place management strategies).
- It is considered that there are opportunities for Hornsby Shire to be a leading exemplar of 'smart city' concepts, principles and practice through, for example:
 - Incorporation of Smart City concepts and technologies through the CBD revitalisation and in other spaces throughout the Shire;
 - Smart Park opportunities; and
 - Planning for autonomous vehicles (electric car parking stations, parking bays, monitoring systems, etc.).

- Hornsby Shire Council, as a facilitator and solutions-broker, could have a role to play in promoting to local government stakeholders, business and other stakeholders (such as education and training bodies) with the support and connections offered by the North Sydney Innovation Network and Regional Development Australia. For example, there may be opportunities to facilitate the exchange of ideas between councils and to conduct 'innovation pilot projects'.
- There may be opportunities for local business development and employment associated with the Hornsby Hospital development.

2.7 Tourism Product and Visitor Economy Infrastructure

- According to economy .id (June 2019), the tourism and hospitality sector accounts for 3.1 per cent of employment in Hornsby Shire compared to the NSW average of 6.5 per cent. Hornsby Shire and surrounds have many high-quality natural assets anchored by national parks and the Hawkesbury River.
- Hornsby Shire's existing tourism product is strong, particularly focusing on the region's natural environment and the natural assets of the Hawkesbury River and estuary, national parks and bushlands. Hornsby Shire is known as the Bushland Shire, with national parks and nature reserves covering more than two-thirds of its area. Anecdotal evidence suggests that most visitors to the parks are coming from the local area.
- The 250 kilometre Great North Walk traverses Hornsby Shire, providing the Shire with a major tourism asset. (The North District Plan has identified the importance of upgrading the Berowra Valley sections of the Great North Walk from Newcastle to Lane Cove and potentially including links from train stations and centres to the Great North Walk, particularly the link from Hornsby to Berowra Valley through Hornsby Quarry).
- Upon completion, the Hornsby Quarry project (Hornsby Park) will be a regional park that could attract people from a wide catchment, thereby supporting Hornsby Shire's visitor economy.
- The Shire's (and region's) natural assets attract strong visitation from outside of the region, particularly for activities such as walking (including guided walks), cycling, boating and canoeing. However, it is difficult to capture value from these users (user pays).



- Hornsby Shire is popular as a location for camping, picnics, boating, canoeing, horse riding, mountain biking, road cycling and fishing – for both locals and visitors from the Greater Sydney area. However, in some locations it is unlikely that existing infrastructure (e.g. parking facilities, boat moorings) could cope with increased visitation.
- There is a planned upgrade to the boat ramp at Wisemans Ferry that will facilitate increased water-based recreation on the Hawkesbury.
- There is reportedly some contested use of mooring facilities between commercial boat operators and recreational fishermen, which needs to be addressed (e.g. dedicated small decks for recreational fisherman).
- Mountain biking, which is popular, takes place on the dedicated mountain biking trail at Hornsby Park. The single-track mountain bike trail is a combination of narrow bushland trails and flowing one-metre-wide trails. Mountain biking also takes place on some fire trails, which are not-purpose-built for that activity. Hornsby could become a significant mountain biking destination following \$3.5 million from NSW Government to expand Hornsby Mountain Bike Trail, reportedly making it the biggest sanctioned trail in NSW.
- There are a number of boat ramps (e.g. Bobbin Head / Apple Tree Bay, Wisemans Ferry and Berowra Waters) and canoe launching ramps (e.g. Crosslands, Brooklyn) throughout Hornsby Shire.
- Existing major events are strong (e.g. Bobbin Head Classic cycling event which ends in the Hornsby Shire). There is potential to build on these and develop a larger events portfolio in collaboration with neighbouring Councils.
- Fagan Park is currently underutilised for formal events. There is potential to use this Council asset for major festivals and events.
- Further development of tourism in Hornsby Shire needs to be balanced with the sustainable management of the region's assets, particularly areas of high visitation including sensitive ecosystems, productive rural lands and development constraints related to existing infrastructure.
- There are growing pressures on the Hawkesbury River system and potential for conflicts of use that need to be managed. The use of the Hawkesbury River is dictated by access. As a key destination, better access to water frontage is required. There is also a need to support this access through increased public moorings and improved parking facilities.

Key Consideration: Active Living Hornsby Strategy

An opportunity to stimulate tourism development and marketing activity in Hornsby Shire was identified in the development of Hornsby Shire Council's Active Living Hornsby Strategy in 2015. This document contained a Statement of Tourism Opportunities for Hornsby, which identified tourism-related opportunities to integrate into the Active Living Hornsby Strategy, noting the overlap between some recreational activities and tourism.

The following areas were identified to help activate the public realm to support a more active and healthy community and to stimulate recreational and tourism-based activity: cycling; walking trails; markets and night-time activities; water-based activities; spas and wellness centres; and farm gate trails and circuits.

Source: The Stafford Group (2015), Statement of Tourism Opportunities for Hornsby Shire, prepared for Hornsby Shire Council

- Consistently-branded wayfinding signage is needed throughout the Shire to direct visitors, particularly when exiting the public transport system.
- There is little quality or boutique accommodation available in Hornsby Shire. There is potential for B&B-style accommodation to develop along the Hawkesbury River and for high-end 'eco-lodge' accommodation and 'glamping' facilities to establish in the area.
- Land use planning regulations may need to be reviewed if this is to be facilitated – noting the environmental constraints including bushfire and flooding risks along the Hawkesbury River and the requirement for input from relevant State Government Agencies. NSW NP&WS is investigating options to convert its old worker cottages to B&B-style short-stay visitor accommodation.
- Agri-tourism is an opportunity that requires further exploration (e.g. farmgate produce, road stop pantries, etc.). The potential for local produce brand development, tied into the Hornsby Shire tourism offer and established branding such as the Hawkesbury Harvest, could be explored.
- There is potential to develop Hornsby Shire's rural product and support the sustainable development off smaller towns and villages. For example, it was reported that there is strong demand for fruit-picking by visitors from the Greater Sydney area.
- Land use planning could be more flexible to support the potential for a variety of productive land uses, including ancillary uses (e.g. wholesale / retail produce shopfronts).



2.8 Tourism Marketing and Promotion

- It is considered by some that Hornsby Shire and the surrounding region is currently not well marketed as a visitor destination.
- Hornsby Shire is not part of a Destination NSW tourism organisation / destination network. Hornsby Shire needs to identify and articulate to prospective visitors, its point of difference. The role of the Discover Hornsby website needs to be considered in this regard.
- There is an opportunity to co-ordinate marketing between the Hawkesbury, Hills, Central Coast and Hornsby Shire Councils, underpinned by a network of tourism information centres (or portals) coordinated across LGA boundaries.
- The Hawkesbury River is a key asset that can be used to position the region from a marketing perspective.
- There is an identified need for a good visitor information service on the Hawkesbury.
- Hornsby Shire's Indigenous and cultural heritage should be celebrated as a feature of its tourism offer.

The Hornsby Shire Economy

3.1 Business and Employment Profile

Located in Sydney's northern suburbs 25 kilometres from the CBD, Hornsby Shire encompasses a total land area of approximately 455 square kilometres and includes land from North Epping in the south to Wisemans Ferry in the north and Brooklyn in the east.

With a population of approximately 152,000 and gross regional product of \$7.2 billion, Hornsby Shire is home to an estimated 14,250 registered businesses and around 50,660 jobs (<https://economy.id.com.au/hornsby>). Data from the National Skills Commission (March 2020) reveals that Hornsby Shire has an unemployment rate of 4.6 per cent compared to the metropolitan Sydney average of 4.5 per cent and the NSW average of 4.6 per cent. Hornsby Shire's major industrial areas are located at Asquith, Waitara and Mount Kuring-gai. The major commercial centres are Hornsby, Pennant Hills, Thornleigh and Dural Service Centre. Two-thirds of the Shire comprises national park and bushland, with major waterways and rural landscape in the northern part of the Shire.

Hornsby Shire's key employment sectors include health care and social assistance, retail trade, education and training, construction, professional, scientific and technical services and accommodation and food services (tourism). The main health care facility in the area is the Hornsby Hospital. The major retail area is the Hornsby Town Centre. Educational facilities include Hornsby TAFE, Hornsby Ku-Ring-Gai Community College and a number of government and non-government primary and secondary schools - see Figure 6.

Many of Hornsby Shire's businesses are home-based businesses. Australian Bureau of Statistics' data on counts of Australian businesses, published by economy.id, shows that of Hornsby Shire's 14,250 businesses, around 60 per cent or 8,600 are non-employing businesses.

Anecdotally, the Shire has a prevalence of micro and home-based businesses involved in business services including finance professionals, information technology (IT) professionals, health professionals and 'lifestyle and family products', as well as construction (i.e. 'tradies'). See Figure 7.

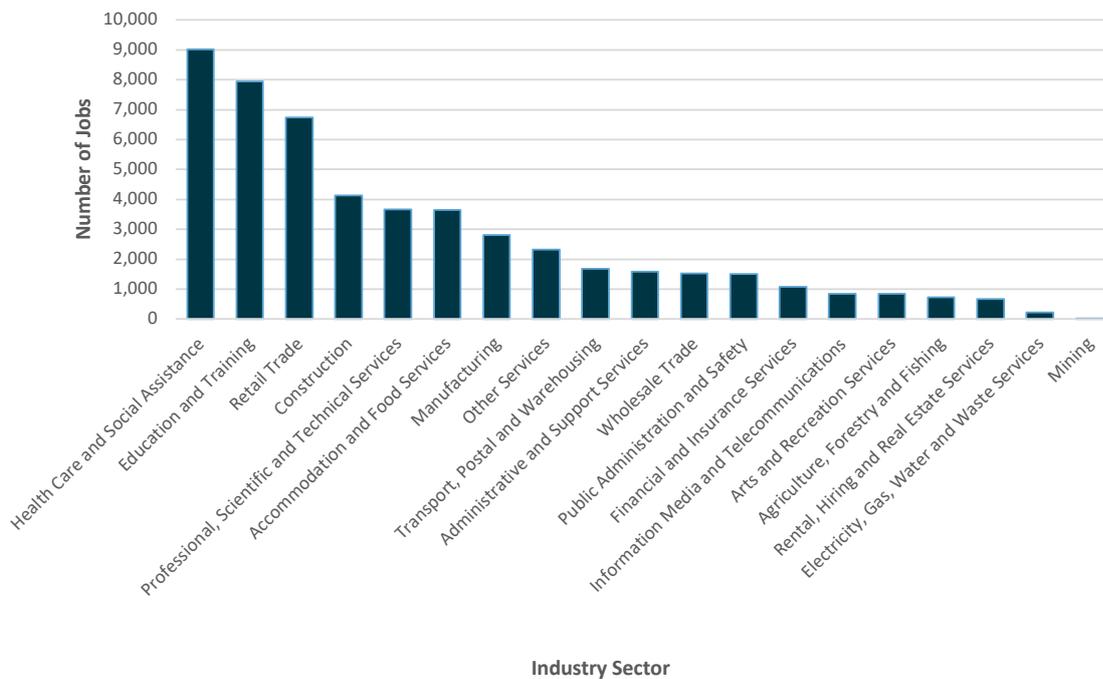


Figure 6 – Employment by Industry, Hornsby Shire, 2017/18

Hornsby Shire economic development and tourism attributes, challenges and opportunities, coupled with an understanding of the community’s aspirations as articulated in Council’s Community Strategic Plan, informs the vision for a productive Hornsby, together with Council’s charter to facilitate and promote activities to enhance the vibrancy and sustainability of the economy and the liveability of all communities in the Shire.

Also critical to informing the vision and Council’s economic development roles and functions is a detailed understanding of Hornsby Shire’s economic development and tourism status and performance.

This is supported by the data on registered businesses, which shows that Hornsby Shire is home to almost 6,200 registered businesses in the financial, professional, scientific and technical, property and other services sectors and over 2,000 construction businesses. More than 1,000 registered local businesses are in the health care and social assistance sector. Hornsby Shire is also home to a number of larger businesses including manufacturers such as Wrigley’s, as well as pharmaceutical manufacturers.

See Figure 7.

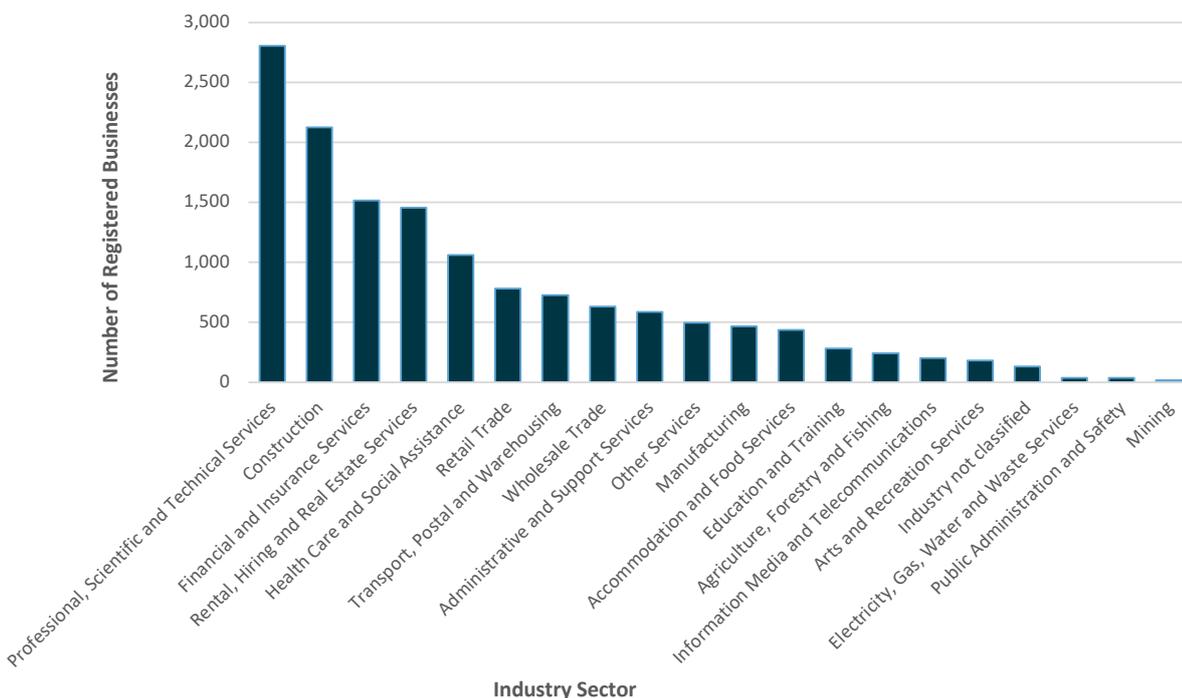


Figure 7 – Number of Registered Businesses by Industry, Hornsby Shire, 2018.

Source: economy.id, accessed June 2019 with interpretations by SC Lennon & Associates

3.2 Local Employment Capacity

One goal of promoting and facilitating economic development is to maximise employment opportunities locally, leading to a more sustainable community. 'Employment capacity' is a simple way of looking at whether Hornsby Shire could theoretically provide jobs for all its residents if they were to choose to work locally.

Employment capacity refers to the number of local jobs in an industry, divided by the number of local residents employed (anywhere) in that industry. A figure over 1.0 means there are more jobs available than residents employed in that industry. Under 1.0 means there are more residents employed than jobs available in that sector.

This is a theoretical exercise as, even if there are enough jobs provided locally, there will always be some people who choose to commute out of the area.

As shown in Figure 8, Hornsby Shire's agriculture, forestry and fishing sector is the only industry which provides more jobs locally (in Hornsby Shire) than there are Shire residents who work in that sector.

Although the local agriculture, forestry and fishing sector is relatively small in employment terms (accounting for 2 per cent of local employment), it does provide more jobs than there are resident workers who are employed in that industry.

For all other industries, to varying degree, there are more resident workers than there are local jobs in Hornsby Shire, meaning the jobs to resident worker ratios are below 1.0.

Those industries which are close to providing enough jobs locally in line with the number of resident workers include construction (a ratio of local jobs to resident workers of 0.97), accommodation and food services (0.92), retail trade (0.86) and other services (0.86).

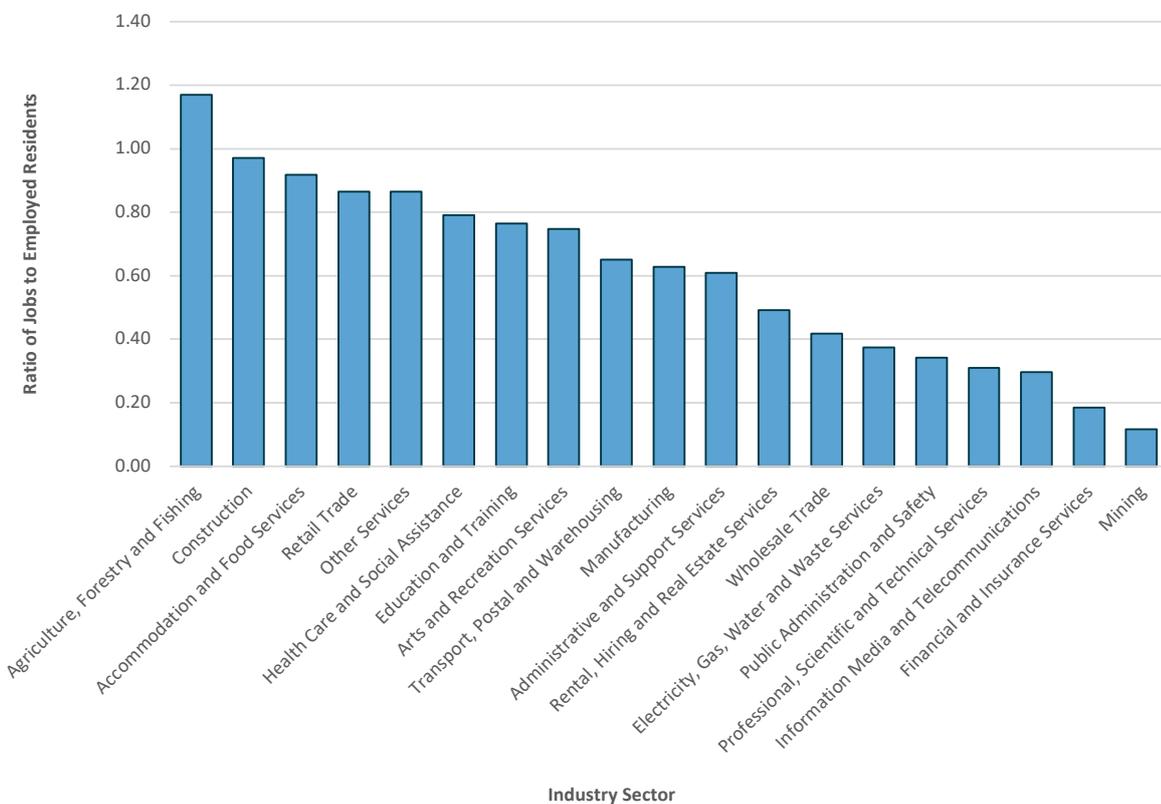


Figure 8 – Employment Capacity by Industry, Hornsby Shire, 2017/18

3.3 Industry Value-Added

In value terms, the Hornsby Shire economy is driven by activity in the construction, health care and social assistance, professional services, education and training, manufacturing and retail trade sectors. As well as being the area's largest provider of jobs, the health care and social assistance sector accounts for 12 per cent of total industry value-added, or \$607 million (source: economy.id, June 2019). See Figure 9.

The local construction sector generates an estimated \$546 million in value-added representing 11 per cent of Hornsby Shire's total industry value-added. The professional, scientific and technical services sector, which accounts for the largest share of local businesses, generates around \$450 million in value-added to the Hornsby Shire economy.

Despite the continuing national decline in manufacturing activity and employment throughout Australia over the past decade or more, Hornsby Shire's manufacturing sector remains relatively strong, providing around 2,800 jobs and accounting for 8 per cent of total industry value-added. Manufacturing also contributes substantially more to the value of Hornsby Shire's exports than any other industry, accounting for almost one-third of total export value.

In Australia, the future for manufacturing is in highly specialised products and processes in areas such as medical technology, automated farming / ag-tech, agri-business, bio-pharmaceuticals, mining and processing technologies, aerospace and defence. Advanced manufacturing is the process by which knowledge-intensive value is added in both the pre- and post production phase in areas including R&D, concept design, planning, engineering and after-sales service. The Advanced Manufacturing Growth Centre estimates that 41 per cent of global trade is now in intermediate goods, for example, components and research.

Hornsby Shire Council's efforts to help grow the local economy must be informed by a clearly articulated, strategic approach which builds on comparative and competitive advantage.

Comparative advantage is an area of relative strength or specialisation. An area's comparative advantage can stem from various sources, such as its geographic location, availability of natural resources, the existence of industry clusters, access to infrastructure or the skill profile of the local population.

Hornsby Shire's underlying attributes influence the types of economic activity that are likely to be successful and have implications for initiatives, which are generally more effective where they build on an existing strength.

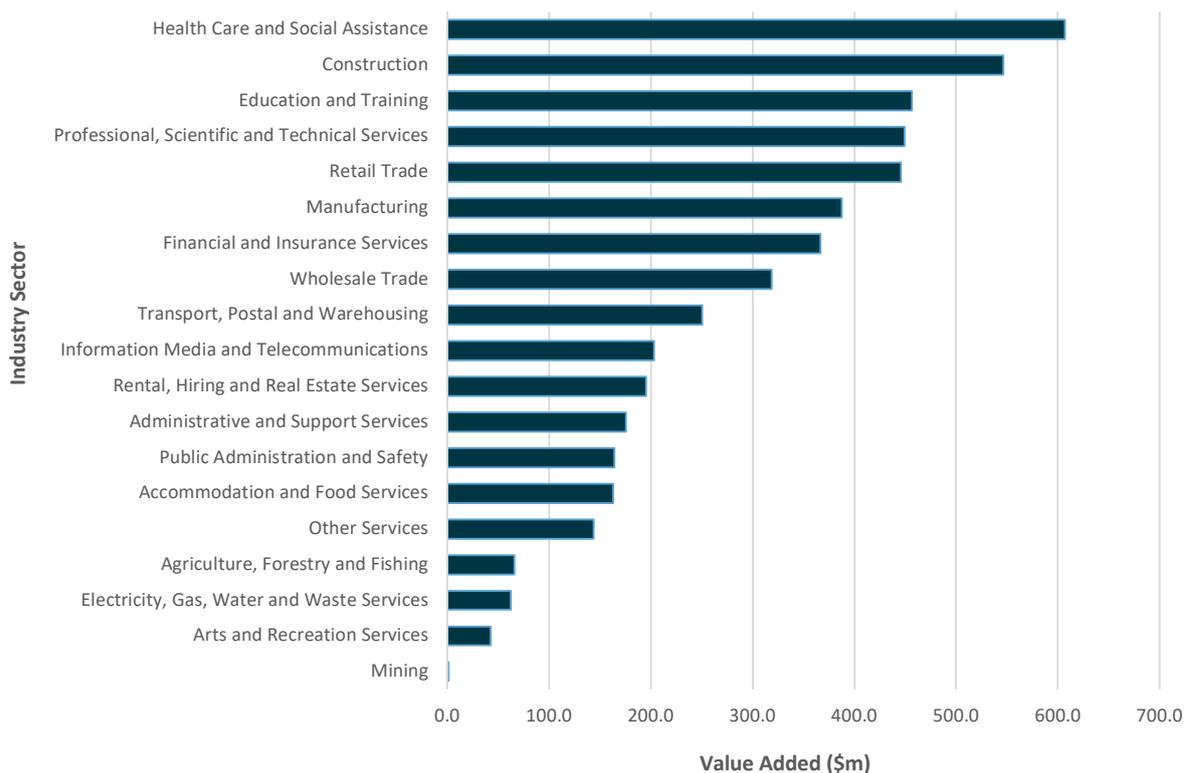


Figure 9 – Value of Tourism and Hospitality, Hornsby Shire and NSW, 2016/17

Source: NIEIR and economy.id, accessed June 2019 with interpretations by SC Lennon & Associates

3.4 Tourism Profile

Australia’s tourism sector has been growing strongly in recent years, and while the COVID-19 pandemic will impact on tourism movements to and within Australia in the short-term, over the medium to longer-term, growth prospects remain positive.

According to IBISWorld (June 2020), Australia’s tourism industry revenue is forecast to decrease by 19.4 per cent in 2019-20, due to the Federal Government’s inbound travel restrictions and limits to domestic travel implemented by state governments.

IBISWorld also notes that domestic tourism is already beginning to slowly start back up, with tourism businesses expected to heavily rely on domestic leisure travellers in 2020-21. In addition, if the Australian Government can reach an agreement with New Zealand and any other country that has successfully contained the virus, then some inbound travel may be allowed to start up again before the end of 2020. Once inbound travel restrictions begin to ease, then the industry should start to see a more pronounced recovery.

According to Destination NSW, the tourism and events sector is vital to the State’s economy, contributing billions in revenue and supporting tens of thousands of jobs. Tourism employment accounts for approximately one in every 15 jobs in NSW.

The NSW Government’s Visitor Economy Industry Action Plan 2030 (August 2018) states that marketing of Sydney will continue to play an essential part of future campaigns. Hornsby Shire is well-located in this regard given its proximity to the major market of Sydney to the south and the Central Coast to the immediate north, coupled with its natural attributes including national parks, regional parks and the Hawkesbury River.

Hornsby Shire’s natural attributes are supported by arts, music and galleries, local markets and recreational activities including spas and wellness centres, bushwalking, mountain bike and farm gate trails and river-based activities featuring the Riverboat Postman, houseboat hire, fishing charters, boat hire, canoe hire and water skiing.

As shown in Figure 10, the value of tourism and hospitality across three key indicators for Hornsby Shire – value-added, output and employment – falls short of the NSW average.

According to Tourism Research Australia, Hornsby Shire’s domestic overnight visitors are more likely to be visiting friends and relatives, accounting for 59 per cent of all visitors. Approximately 60 per cent of the Shire’s international visitors are visiting friends and relatives, with another 27 per cent visiting the Shire on holiday.

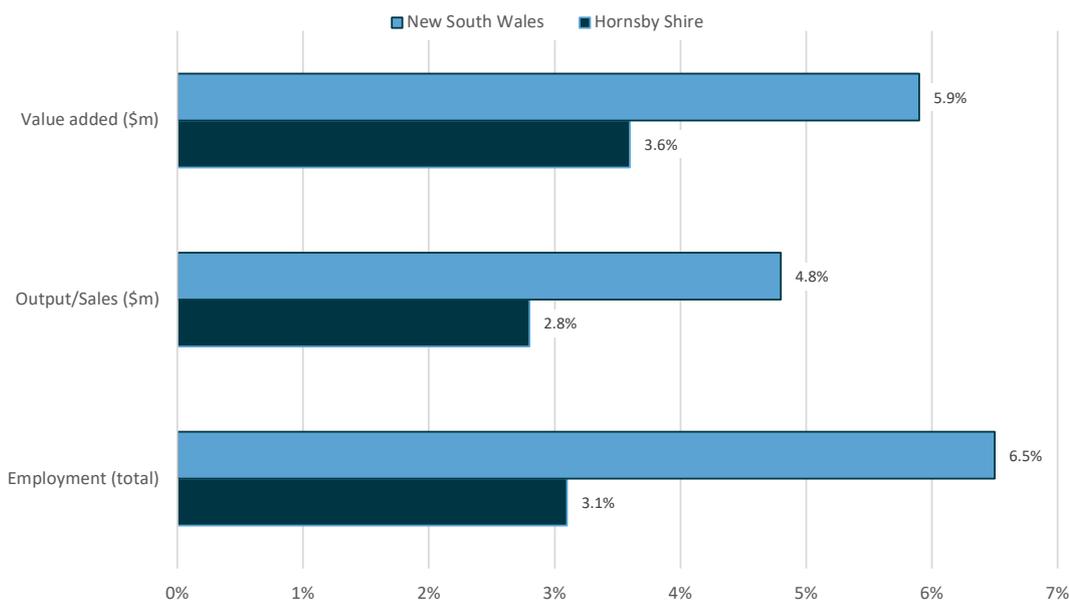


Figure 10 – Value of Tourism and Hospitality, Hornsby Shire and NSW, 2016/17
 Source: NIEIR and economy.id, accessed June 2019 with interpretations by SC Lennon & Associates

This suggests there is potential to grow both the domestic and international visitor markets for Hornsby Shire. Engendering a pride in place from the local residential population will be key to capitalising on this trend.

The tourism and hospitality sector accounts for only 3.1 per cent of total employment in Hornsby Shire compared to 6.5 per cent across NSW. The tourism and hospitality sector also falls short compared to the NSW average in its contribution to output and industry value-added.

This suggests that, despite the Shire's natural and other attractions, there is scope to enhance the contribution of the visitor economy to economic development in Hornsby Shire. This will require a focus on the 'enablers of a vibrant visitor economy'.

These tourism enablers include a conducive natural, built and social/cultural environment; quality infrastructure; effective marketing and information management; and purposeful and collaborative governance.

3.5 Employment Location Quotients

A location quotient (LQ) shows the percentage of local employment in a particular industry divided by the percentage of the NSW average that this industry makes up. Location quotient analysis is useful in socio-demographic and economic studies because it shows what makes a region’s socio-economic profile unique in comparison to its state and/or the nation. The higher the LQ, the more specialised the local economy is in that industry relative to the rest of NSW.

LQ analysis also allows for comparisons with other Shires and regions using a consistent (state or national) benchmark. It is common practice in regional economic analysis therefore, to compare the region (or Shire) with the state or national average.

Where LQ=1, that industry is exactly as prevalent as in NSW. A LQ greater than 1.2 indicates a significant specialisation of the industry in the local area – possibly a key economic strength. Higher numbers mean greater specialisations. Anything over 2 is a major specialisation.

As illustrated in Figure 11, in employment terms, Hornsby Shire has a high relative specialisation in education and training compared to the State average, with a location quotient of 1.72. Other industries with a relative specialisation include health care and social assistance

(1.33), retail trade (1.33), other services (1.22) and arts and recreation services (1.04).

The importance of the retail trade and services sector as a provider of jobs in the local economy is demonstrated by the strength of the location quotients for retail trade and other services, which includes personal services as well as maintenance and repair services.

Arts and recreation services includes sports and recreation activities and creative and performing arts activities.

Hornsby Shire’s arts and creative industries may represent a local competitive strength that can be further developed and capitalised upon – despite it developing from a small base.

Creative industries are different to other industries because ‘creativity’ is their primary source of value. They include cultural activities like film, music and art, and ‘creative services’ including architecture, design, marketing, and software and digital content. Research shows that, nationally, employment in creative industries is growing 40 per cent faster than the Australian economy as a whole (Queensland University of Technology).

3.6 Industry Growth / Share

Another means of informing an assessment of how the local economy is evolving and how it could develop,

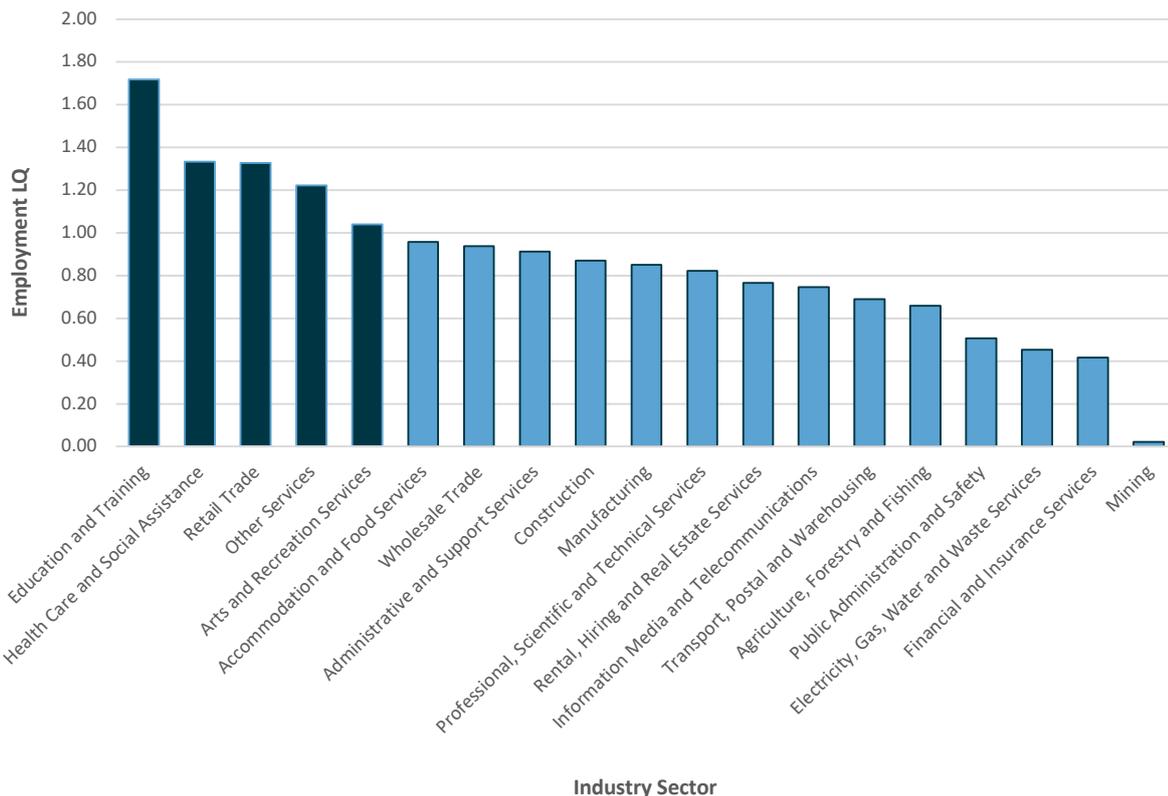


Figure 11 – Employment Location Quotients, Hornsby Shire to NSW, 2017/18
 Source: economy.id, accessed June 2019 with interpretations by SC Lennon & Associates

■ = LQ > 1
 ■ = LQ < 1

involves an analysis of industry trends and prospects. Figure 12 presents an employment growth-share matrix for selected industries in Hornsby Shire. This shows how each local industry performs relative to NSW as a whole with respect to its relative specialisation, as indicated by its LQ, its rate of average annual growth and its size as measured by the number of jobs in that industry sector. Stages in the growth-share matrix are as follows:

- Expanding: If in the top right quadrant (high average annual growth/higher than average concentration), this implies a strong, adaptive industry sector, which is good news for local economic development.
- Emerging: If in the lower right quadrant (high average annual growth/below average concentration), this is also good news, implying an emerging, growing industry that may need assistance to mature.
- Transforming: If in the upper left quadrant (lower than average annual growth/above average concentration), this is not good news, implying the industry is at risk (overall) and needing to increase innovation and productivity to compete with other regions.
- Seed or Transitioning: If in the lower left quadrant (lower than average annual growth/lower than average concentration), this could imply that the industry is neither developed nor growing in Hornsby Shire, or it could also mean that the 'seed' industry has some potential for growth.

Hornsby Shire's expanding industry sectors (high growth and high specialisation relative to NSW) include education and training and health care and social assistance.

The local construction industry, which is a large employer, has also displayed positive growth and a location quotient close to 1.0 suggesting it is in a healthy stage of growth.

Despite recent job losses, the local manufacturing sector remains a large employer. This, coupled with emerging opportunities in advanced manufacturing nation-wide, suggests this industry is in a transitional stage of development, with opportunities to consolidate and grow in future. Hornsby Shire's arts and recreation services sector, though quite small in employment numbers, has a location quotient above 1.0 and has been growing strongly at an average annual rate of 3.0 per cent. This points to opportunities in both the arts and creative industries as well as sport and recreation in Hornsby Shire. Growth in this sector can contribute to the overall attractiveness and liveability of the area.

Hornsby Shire's professional, scientific and technical services sector (which provides for a large share of local jobs), together with the local financial and insurance services and information, media and telecommunications services sectors are in an emerging stage, with healthy rates of growth. It is these 'knowledge-intensive' service industries, together with areas of specialisation in education and health, which will likely form the foundation of future economic growth and development.

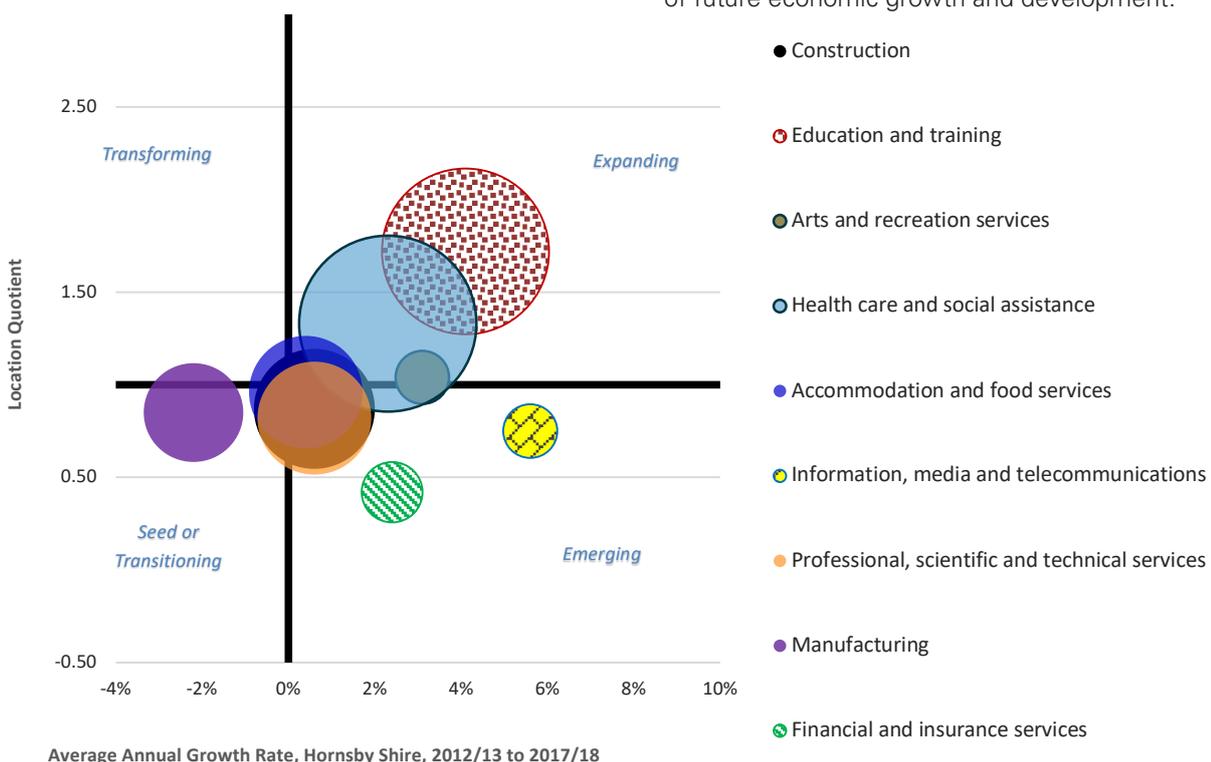


Figure 12 – Industry Employment Growth-Share (Selected Industries), Hornsby Shire to NSW, 2012/13 to 2017/18
 Source: economy.id with interpretations by SC Lennon & Associates

3.7 The Impacts of COVID-19

IBISWorld (June 2020) has classified the degree of impact for each industry sector (broadly defined) as 'moderate', 'high' or 'very high'. The level of disruption depends on the degree of exposure to international trade, and the impact on business and consumer confidence. The classifications of most relevance to Hornsby Shire are:

- Food Product Manufacturing - Very High
- Other Store-based Retailing - Very High
- Accommodation - Very High
- Food and Beverage Services - Very High
- Property Operators and Real Estate Services - Very High
- Arts and Recreation Services - Very High
- Building Construction - High
- Professional, Scientific and Technical Services - High
- Financial and Insurance Services - Moderate
- Food retailing - Moderate
- Construction Services - Moderate
- Hospitals - Moderate
- Social Assistance Services - Moderate
- Adult, Community and Other Education - Moderate
- Personal and Other Services - Moderate

A COVID-19 Outlook Tool has been developed by economy id to show the economic and industry impacts at the local government area level. This tool draws on the economic forecast model developed by NIEIR and focuses on the impacts to June 2020 (with updates planned). The findings of the economy id / NIEIR analyses of the Hornsby Shire economy are presented below.

Figure 13 illustrates the estimated impact of COVID-19 on employment and Gross Regional Product (GRP) in Hornsby Shire compared to Greater Sydney, NSW and Australia. Hornsby Shire's GRP is forecast to fall by -12.7 per cent in the June Quarter 2020. This fall is lower than the NSW average. Local jobs are forecast to fall by -8.2 per cent in the June Quarter 2020, which equates to a fall of 4,154 local jobs. If JobKeeper recipient impacts are included in the analysis, then the employment fall is estimated at -14.0 per cent (7,098 jobs). According to NIEIR's modelling, the impact of COVID-19 on employed residents (-9.0 per cent) has been higher than the impact on local jobs in the Shire.

Figure 14 shows the impact of COVID-19 on industry value-added in Hornsby Shire. As shown below, the greatest adverse impacts, in proportional terms, will be felt in the Arts and Recreation Services, Accommodation and Food Services and Other Services sectors. Conversely, those industries that are expected to be positively impacted include Information Media and Telecommunications and Health Care and Social Assistance.

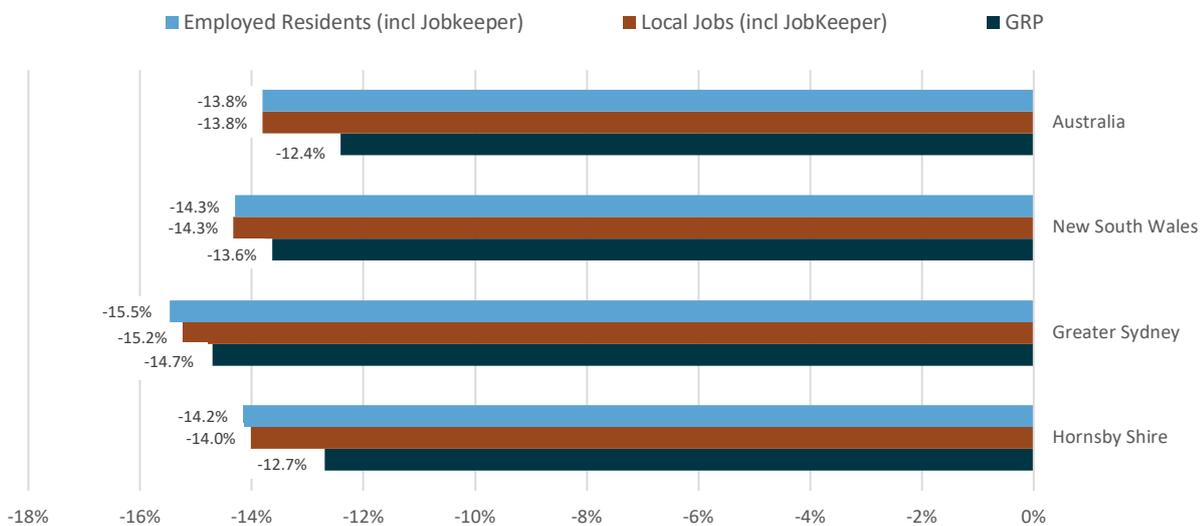


Figure 13 – COVID-19 Impacts on Jobs and GRP, Hornsby Shire, Greater Sydney, NSW and Australia, June 2020
 Source: economy.id and NIEIR (May 2020) with interpretations by SC Lennon & Associates

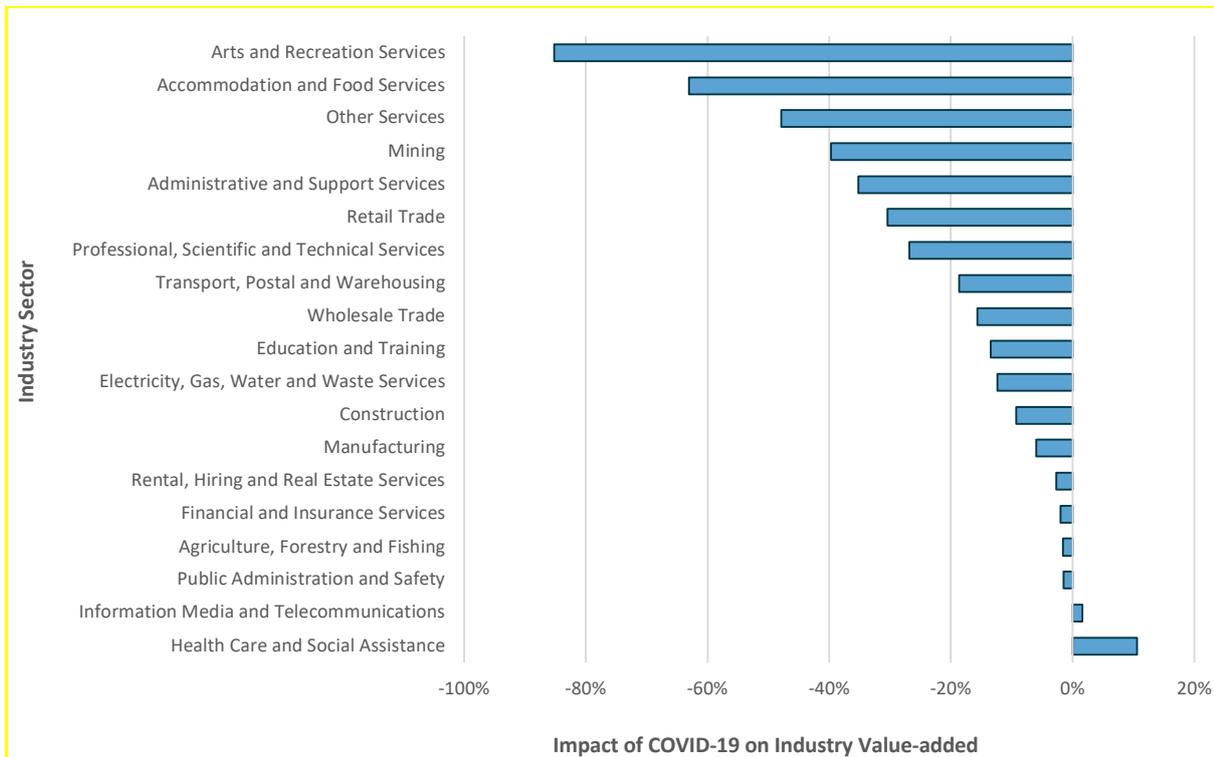


Figure 14 – COVID-19 Impacts on Industry Value-Added, Hornsby Shire, June Quarter 2020 Compared to 2018/19 Quarter Average. Source: economy.id and NIEIR (May 2020) with interpretations by SC Lennon & Associates

3.8 Hornsby Shire’s ‘Focal’ Industries

The analysis informing this strategy shows that those industries with existing relative strengths or prospects for growth, and which present opportunities for further investigation in Hornsby Shire, include education and training, health care, professional and financial services, the arts and creative industries and tourism, including sports and recreation-based tourism and events. Other population-driven industries, like retail trade and construction are important employers which are reliant on the economic drivers for their own sustainability and growth. See Figure 15 below.

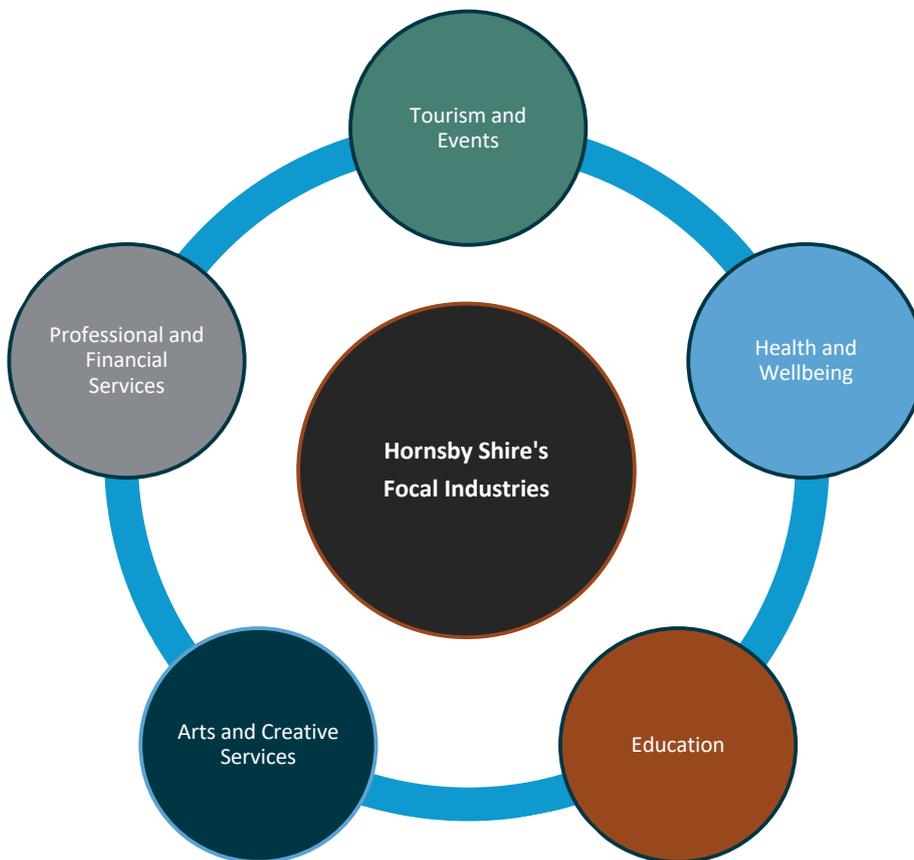


Figure 15 – Hornsby Shire’s ‘Focal’ Industries Quarter Average. Source: SC Lennon & Associates

A Framework for Promoting a Productive Hornsby Shire

4.1 Hornsby Shire's Economic Development and Tourism Vision

The Economic Development and Tourism Strategy, 2021-2026 is informed by socio-economic research and analysis, targeted stakeholder consultation and broader community consultation.

The immediate impacts of COVID-19 are also taken into consideration and used to inform immediate measures to help local businesses access guidance and support that is available to assist with the economic recovery. With a view to the longer-term, the Economic Development and Tourism Strategy themes and directions reflect stakeholder views regarding Hornsby Shire's issues, challenges and opportunities, which combined, inform the vision.

Hornsby Shire Economic Development and Tourism Vision

Building on the superb natural environment and driven by innovation and sustainability in a diversity of industries, Hornsby Shire is a vibrant and connected business and employment hub, and a location of choice for visitors, for investment, for learning and for living.

4.2 Hornsby Shire Council's Economic Development and Tourism Charter

The vision is supported by Hornsby Shire Council's economic development and tourism charter which describes Hornsby Shire Council's commitment to promoting, facilitating and co-ordinating economic development and tourism activities.

Hornsby Shire Council's Economic Development and Tourism Charter

Hornsby Shire Council supports economic development through sound planning, information-sharing and collaborative partnerships, to help attract visitors, promote new investment, encourage local businesses to flourish in town centres in particular and cultivate Hornsby Shire's appeal as a place to live, learn and prosper.

Through its role as an information-broker, facilitator and coordinator of activities designed to support and promote economic development and tourism, Hornsby Shire Council:

- Prioritises opportunities that support innovation and development of the Shire's key industries of education, health & wellbeing, advanced manufacturing, business services, the creative industries and tourism, to grow existing, new and emerging markets.
- Engages with the Shire's home-based, micro, small-to-medium and large businesses to address shared challenges and opportunities for business investment, innovation, growth and development.
- Proactively promotes the Hornsby Shire area to prospective investors, using a strategic, informed and targeted approach, consistent with the Shire's vision for economic development and tourism.
- Undertakes a partnership approach to economic development and tourism promotion, working in collaboration with neighbouring councils, other tiers of government, key institutions and industry to help build on Hornsby Shire's natural attributes to unlock its economic potential.

Guided by its economic development and tourism charter and the action plan presented in this strategy, Hornsby Shire Council provides the enabling environment to help facilitate the competitiveness and success of businesses across all sectors of the local economy.

4.3 Hornsby Shire Council’s ‘Core’ Economic Development and Tourism Activities

Having regard for the ‘enablers’ of economic development and tourism, there are five ‘core’ areas of economic development activity which underpin the implementation of the Economic Development and Tourism Strategy, 2021-2026, see Figure 16. These are:

1. Strategic Planning and Place Management – Hornsby Shire Council will continue to work to ensure its strategic planning policies and activities respond to the Shire’s (and wider region’s) economic needs and opportunities. It will continue to undertake the studies and research necessary to identify, for example, the Shire’s retail and commercial floorspace capabilities and requirements, so it knows what the Shire can or cannot accommodate in future and then plan appropriately for that. Central to Council’s efforts to support economic development and the liveability of the Shire’s centres is investment in infrastructure and services in the Hornsby Town Centre.
2. Investment in Infrastructure and Services – Hornsby Shire Council is committed to nurturing the foundations for prosperity – like strategic infrastructure, community services and facilities, access to employment and places where industry can invest and do business. It plans for and provides those critical infrastructure items that fall under Council’s control and pro-actively develops the

business case for those items that fall outside Council’s direct control.

3. Local Business Support – Local enterprise often presents the greatest potential to take advantage of new investment opportunities and a successful investment enhancement strategy encourages additional investment from business and industry already located in the local area. To succeed, businesses need access to workers with appropriate skills. Hornsby Shire Council will continue to liaise with business and industry, representative organisations and the Shire’s education and training providers to network ideas and articulate workforce planning priorities that need to be addressed. In the immediate term, Council will play its role in supporting the economic recovery from COVID-19 by acting as a broker of information on small business support programs designed to help address the impacts of the pandemic.
4. Targeted Investment Attraction – Investment is fundamental to economic development, and access to international, national and regional markets is a key determinant of sustainable economic growth. Hornsby Shire Council will continue to help facilitate private sector investment by promoting what the Shire has to offer prospective investors. Council also works hard to attract government investment in strategic infrastructure. It does this through the identification of regional priorities and then preparing business cases to inform both Council and other government funding support for key projects.

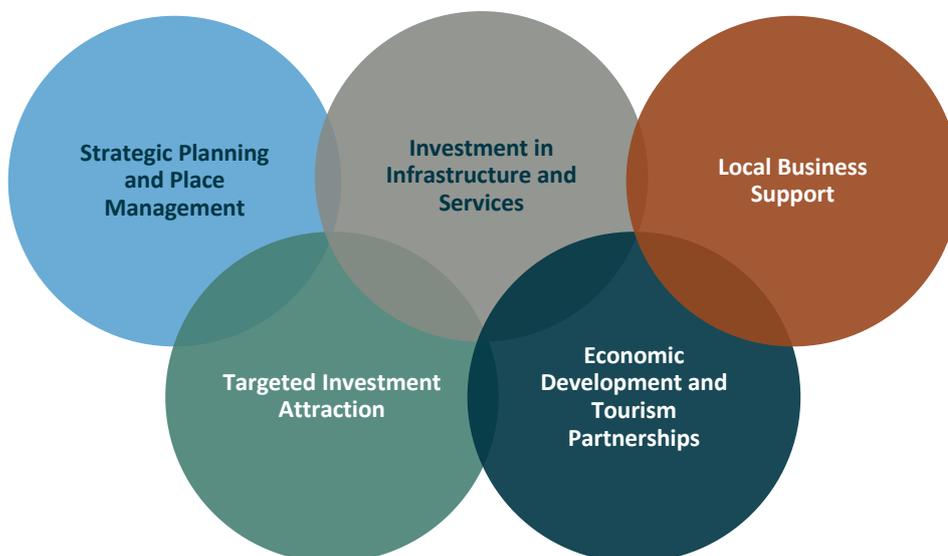


Figure 16 – Hornsby Shire Council’s ‘Core’ Economic Development and Tourism Activities

5. Economic Development and Tourism Partnerships – Hornsby Shire Council provides a unifying voice for communities and for local businesses when lobbying State and Federal Governments on key economic or infrastructure issues. By undertaking investigations and preparing informed business cases, Council provides a conduit for State and Federal Government funding for bigger infrastructure projects like sporting and community facilities, arts and cultural facilities and health, education and transport infrastructure.

4.4 Economic Development and Tourism Strategy Themes

The Economic Development and Tourism Strategy, 2021-2026 documents opportunities for Hornsby Shire Council and its partners in government, the non-government sector, industry and the community to address collaboratively, to help facilitate change towards a prosperous future for Hornsby Shire and the wider region.



Theme 1:
Connected Hornsby Shire



Theme 2:
*Smart and Innovative
Hornsby Shire*



Theme 3:
Destination Hornsby Shire

The opportunities are informed by the economic development vision and Council’s economic development charter. Prioritising where Council’s resources can best be directed for the purpose of facilitating and promoting economic development and tourism is a key consideration of the strategy.

The Economic Development and Tourism Strategy, 2021-2026 contains three strategic themes. They are:

1. Connected Hornsby Shire;
2. Smart and Innovative Hornsby Shire; and
3. Destination Hornsby Shire.

A total of 39 individual opportunities for action have been identified and categorised under the three strategic themes. These are opportunities that Council and its partners can focus on to help activate and grow the local economy. As shown in Figure 17, each theme includes:

- Strategic Objective – this is a statement setting out what the target outcome is for that theme.
- Rationale – this is a statement providing a set of reasons and a logical basis for opportunities identified.
- Opportunities and Enablers – refer to the key elements that need to be addressed to help realise the strategic objective.
- Tasks for Action – these are the actions to be pursued

in order to realise the stated objective.

- Key Outputs – these describe the desired outputs that will result from the opportunities being realised.

Some opportunities for action are focused on catalyst project planning and development initiatives which require action combined with a well-planned course of project implementation for the desired outcomes to be realised.

Many actions are focussed on strategic program implementation. These are initiatives that can be addressed as part of Hornsby Shire Council’s day-to-day economic development planning and facilitation functions in a strategic and informed manner.

The majority of the tasks for action will be Council-led’ in that they involve specific tasks for Hornsby Shire Council and an allocation of human, physical and financial resources. Others refer to ‘Council-supported’ activities and these are advocacy or support initiatives where the implementation of the actions is to be led by agencies other than Council.

Each strategy theme is addressed in turn below.

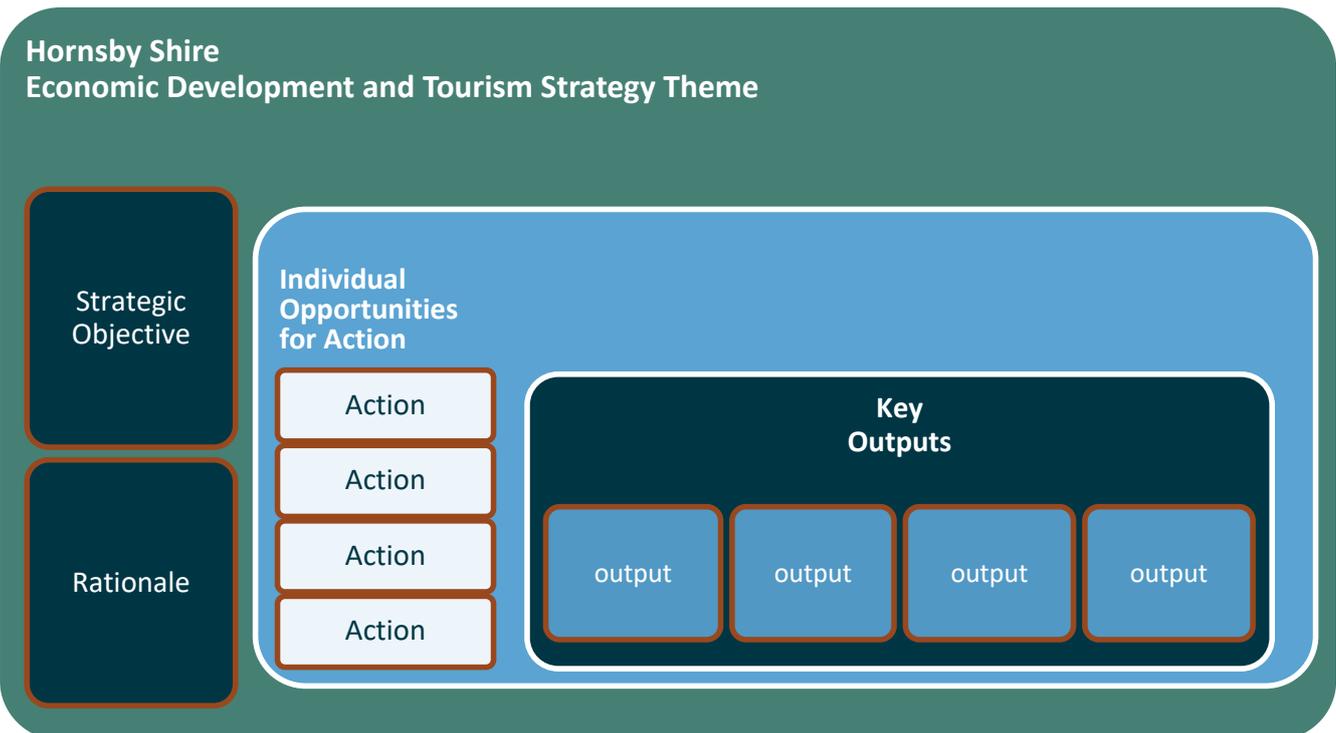


Figure 17 – Economic Development Strategy Planning Framework



4.5 Economic Development and Tourism Strategy Action Plan

Theme 1: Connected Hornsby Shire

Strategic Objective

Establish and promote Hornsby Shire Council's role and capacity as an enabler of economic development.

Rationale

While business and industry drive economic activity and employment creation, local government has a vital role to play in the leadership, organisation, delivery and promotion of local and regional economic development. Hornsby Shire Council can create the conditions for more effective economic partnerships and enabling private and community entrepreneurship, particularly through brokering, facilitation and information sharing.

The process of economic development in local government is underpinned by collaboration and partnerships and it typically involves working with businesses, other tiers of government and intra-organisationally. Outside of the Shire, Council's key organisational relationships include the NSW Department of Planning, Industry and Environment for NSW, RDA Sydney, North Sydney Innovation Network, The NSW Small Business Commission and neighbouring councils. Within the Shire, key relationships include business networks and chambers of commerce, Hornsby Ku-ring-gai Hospital, Hornsby Ku-Ring-Gai Community College and Hornsby TAFE.

The Economic and Development Tourism Strategy, 2021-2026 provides the overarching framework for investment attraction and the promotion of new business investment from within the region. Hornsby Shire Council and its regional partners can provide a unifying voice for communities and for businesses when lobbying State and Federal Governments on key economic or infrastructure issues and opportunities. Council has a key role to play in attracting government investment in enabling infrastructure by identifying strategic priorities and preparing business cases to inform government funding for key projects.

The plan of action presented in this strategy will assist Hornsby Shire Council in this process through articulating and prioritising collaborative projects and the means to establish the evidence base to attract government funding support for bigger infrastructure projects like transport infrastructure as well as education, health and other facilities.

Hornsby Shire Council is often a first point of contact for the local business community as well as prospective new businesses and investors, meaning it has a role to play in informing businesses of State and Federal Government business assistance programs on offer. It can directly support local business and employment growth by facilitating access to small business support programs, training workshops and investment forums, and through ensuring a supportive and enabling regulatory environment.

In Hornsby Shire, place-based modes of service delivery also offer an opportunity for Council to align economic development objectives and activities with the organisation's broader program of work and strategic objectives.

Opportunities and Enablers

- Aligning the process of economic development with Hornsby Shire Council's strategic and community planning objectives.
- Continuing to develop a culture of connectedness and collaboration – between Council program areas, between Council and the community, between Council and the business community and between Council and other local governments, state and federal government agencies, key institutions, tourism associations and regional development bodies.
- Positioning and marketing Hornsby Shire Council as being 'open for business' and business friendly.
- An informed and skilled Council in the delivery of economic development promotion and facilitation, including research and planning, infrastructure and service delivery, business support and investment promotion and economic development advocacy and partnerships.
- Stakeholder partnerships for positive economic development and tourism outcomes in Hornsby Shire, including partnerships with the Shire's education and training providers.
- Implementing a whole-of-place approach to economic development in Hornsby Shire.
- Promoting a pro-active, flexible and pragmatic approach to the design and application of planning laws and regulations in Hornsby Shire.

CONNECTED HORNSBY SHIRE

ID No.	Tasks for Action	Priority (High, Medium, Low or Ongoing)	Estimated timeframe – subject to resourcing, funding and other priorities	Output	Outcome	Policy/strategy link
1.1	Define and align Hornsby Shire Council's economic development roles and functions with its place-based focus and investigate the resources needed to implement the Economic Development and Tourism Strategy.	High	Short term <2 years	Adopted strategies	Clear role definition and expectation management for service approach	Place Framework, Economic Development and Tourism Strategy, Employment Land Study
1.2	Develop an economic development capacity-building program aimed at upskilling and educating Hornsby Shire Council staff and Elected Members on Council's economic development roles and functions.	Medium	Short term <2 years	Information package on the role of local government in economic development	Councillors and staff understand Council's role in economic development	Place Framework, Economic Development and Tourism Strategy
1.3	To assist Council's economic development facilitation efforts, consider an approach to engaging with business in the Shire.	High	Short term <2 years	Adopted Economic Development and Tourism Strategy with actions listed in Operational Plan	Clear roles and actions to be undertaken by Council to promote and facilitate economic development and tourism	Place Framework, Economic Development and Tourism Strategy
1.4	Develop and formalise working relationships with key government agencies and interest groups including RDA Sydney, Greater Sydney Commission, NSW Department of Industry, neighbouring councils, chambers of commerce and other business groups.	High	Short term <2 years	Formal agreements developed where necessary and desired.	Agreed roles and responsibilities with partner organisations	
1.5	Review Council's land use planning and other regulatory processes to facilitate an enabling environment for sustainable economic development in Hornsby Shire.	Ongoing	Ongoing	Reviewed	Improved customer experiences for businesses in the Shire.	Employment Land Study
1.6	Develop a communications strategy targeting businesses, promoting Council's commitment to engaging with the business community to deliver positive economic development outcomes for the Shire.	Medium	Medium term <4 years	Marketing and communications strategy	Council better communicates its willingness and ability to work collaboratively with business.	
1.7	Investigate means by which Hornsby Shire Council can act as a broker / facilitator of small business support programs including programs addressing the impacts of COVID-19.	Medium	Medium term <4 years	Council adopts an approach to providing access to support programs for small business	Small businesses in the Shire are able to access support programs.	
1.8	Formally engage with Hornsby Ku-Ring-Gai Community College and Hornsby TAFE to investigate opportunities and potential strategies (including government advocacy) to ensure training priorities address new and emerging industry needs.	Medium	Longer term <6 years	Strategy developed to align business needs with local education provision	The local workforce has the requisite skills to work in local industry	Employment Land Study
1.9	Continually liaise with State and Federal Government funding agencies and monitor grants programs to ensure that business cases for priority projects are at the ready when project funding opportunities arise.	Ongoing	Ongoing	Grant applications and associated business cases are produced and submitted	Council maximises the financial injections into the Shire from government sources.	
1.10	Consider the establishment of a 'shop local' program and a local procurement program for Council including for Aboriginal owned businesses.	High	Short term <2 years	Campaign developed and delivered to encourage local expenditure	Spending is retained in the Shire to benefit the local economy and community wellbeing	Procurement policies
1.11	Host an annual Small Business Month Event to support, educate and connect local businesses.	Ongoing	Ongoing	Subject to grant application	Local events for business held to address themes of annual funding guidelines.	
1.12	Undertake a survey of small and home-based businesses to better understand the composition and needs of this sector	High	Short term <2 years	Business survey conducted	Council better understands the needs and makeup of the sector	
1.13	Provide support for innovation, start-ups and digital economy.	Medium	Longer term <6 years	Strategy developed to support these sectors	Culture of support developed	
1.14	Develop a strategy to attract investment to the Hornsby Shire, including knowledge intensive jobs to the Hornsby Town Centre, and to reduce leakages of internal spending and investment.	High	Medium term <4 years	Investment attraction strategy developed. Strategy developed to reduce employment and economic leakage from the Shire.	Council minimises expenditure leakage from the Shire and maximises investment into the Shire	Employment Land Study
1.15	Develop a policy that ensures positive impacts to business of Council investment in local infrastructure.	High	Short term <2 years	Policy adopted by Council	Council considers the positive impacts on local business that can come when deciding on infrastructure investment.	
1.16	Establish functional partnerships and committees based on key project objectives.	Ongoing	Ongoing	Partnership agreements are made when required	Council documents project partnership and collaborations	

Theme 2: Smart and Innovative Hornsby Shire

Strategic Objective

Establish Hornsby Shire as a globally connected smart and innovative Shire.

Rationale

To succeed in the 21st Century economy, cities need to be productive and accessible, but they also need to be liveable. A 'smart city' is an ecosystem of people, processes, technology and stakeholders working together. It is not about one single product or technology but an array of interconnected devices, services and people. Great smart cities attract talent and investment, encourage innovation and entrepreneurship and create jobs and prosperity.

By taking advantage of the unprecedented pace of technological progress, governments and the community can use smart city principles, planning and practices to help make cities more prosperous and sustainable. To achieve this, it is critical that councils, state and federal governments as well as private enterprises work together to create plans, policies and regulations that will help cities and regions become smart, sustainable and liveable.

Smart cities projects integrate dynamic information technologies, fast internet, the interconnectedness of the Internet of Things (IoT) and social media in a digital mesh to foster local and regional economic growth, improve the efficiency and effectiveness of services provision to business and residents, and resolve increasing urban problems including mobility, access, waste, climate change, urban community connectivity and business support.

However, smart cities are about much more than just technology and data. They are also healthy and sustainable. Smart education is also a key ingredient. Skills and intellectual capital are increasingly important in a modern economy and education plays a central role. Quality education (including vocational education and training) underpins knowledge, innovation and entrepreneurship that are important foundations for a robust and sustainable economy.

Smart cities can also facilitate the development of 'green jobs'. In the United Nations Environment Programme, green jobs are defined as "positions in agriculture, manufacturing, R&D, administrative, and service activities aimed at substantially preserving or restoring environmental quality".

Smart cities are built on a base of collaboration and sustainability, as innovation develops as a result of the interplay between differing participants. This requires local governments to work in partnership with a diversity of stakeholders, including other levels of government, academia, industry and community groups. In this regard, Council can play the role of facilitator, of a framework that supports a wider innovation ecosystem.

A key part of Hornsby Shire Council's role in this regard, is knowing when and how to support the local innovation ecosystem. Facilitating the planning and development of innovation hubs is one model for joint collaboration between ecosystem players.

Opportunities and Enablers

- Establishing a 'smart shire' vision and collaborative implementation framework that emphasises sustainability via the ICT Strategy.
- Understanding existing 'smart city' capabilities and gaps.
- Leveraging current developments to trial smart city technologies.
- Applying 'smart planning' to create great physical places and spaces as part of a smart shire framework.
- Planning for the future of transport (electric vehicles, autonomous cars, rapid light transit).
- Facilitating the development of infrastructure and networks to support business innovation.
- Supporting innovation in agriculture.
- Identifying and supporting opportunities for 'green jobs' which leverage smart technologies to facilitate sustainable employment in sectors such as education, research and health care.
- Incorporating the wider region's innovation network and infrastructure capabilities.
- Developing collaborative partnerships with the Shire's education and training providers.
- Creating synergies between smart shire aspirations and the triangle of education, training and employment.
- Protecting and providing adequate employment land / commercial space for a diversity of economic activities including 'smart agriculture'.
- Ensuring adequate land is available for both housing and employment, to help facilitate a high level of employment self-containment (local jobs for local residents).

SMART AND INNOVATIVE HORNSBY SHIRE

ID No.	Tasks for Action	Priority (High, Medium, Low or Ongoing)	Estimated timeframe – subject to resourcing, funding and other priorities	Output	Outcome	Policy/strategy link
2.1	Commence the development of a Smart Cities Strategy in conjunction with the ICT Strategy. Ensure that the Strategy meets place making requirements and addresses the needs of business.	High	Short term <2 years	Current and desired next step “smart city” initiatives of Council are audited and understood with a view of producing a Smart City Strategy in the longer term.	Council aligns future smart city goals with functional, practical and community driven outcomes.	
2.2	Lobby the Federal Government for improved telecommunications infrastructure in Hornsby Shire, with a focus on the needs of micro and home-based businesses.	Ongoing	Ongoing	Home based business survey results related to telecommunications infrastructure are forwarded to the Federal Government.	Improved understanding of current business experiences with telecommunications infrastructure.	Employment Land Study
2.3	Ensure that future and current projects such as Hornsby Town Centre Review, Hornsby Park and Westleigh Park make allowance for future smart city infrastructure.	Ongoing	Ongoing	Policy developed to ensure capital projects are “future proofed” and ready to include smart infrastructure.	Council can ensure that future costs of retrofitting smart infrastructure are minimised as much as possible.	
2.4	Develop a strategy to attract, support and develop high-tech and emerging, environmentally sustainable industries in Hornsby Shire including the agribusiness and ag-tech industries using locally established business groups and networks	High	Long term <6 years	Strategy developed	Council implements strategy to grow the targeted industries	Employment Land Study
2.5	Undertake a market assessment and, subject to findings, prepare a business case for a co-working space and meeting space in Hornsby Shire.	Medium	Long term <6 years	Business case developed and considered for a co-working and meeting space.	Subject to business case results	Community and Cultural Facilities Strategic Plan
2.6	Undertake a market assessment and, subject to findings, prepare a business case for the development of a business park in Hornsby Shire.	Medium	Long term <6 years	Business case developed and considered for a business park	Subject to business case results	Employment Land Study
2.7	Prepare a Hornsby Shire arts and creative industries audit and directions strategy to better understand the local creative services economy and opportunities to leverage arts and creative industries in place-based economic development.	Low	Long term <6 years	Strategy developed and adopted	Creative services economy is better understood and opportunities leveraged	
2.8	Prepare a Hornsby Shire ‘green jobs’ scoping study to define and better understand the current profile and opportunities to leverage smart city principles which promote the growth of ‘green businesses’ and ‘green jobs’.	Medium	Medium term <4 years	Scoping study completed	Opportunities to leverage smart cities principles and promotion of green industries is maximised.	
2.9	Explore ways to support Council’s waste management strategy by applying the principles of the ‘circular economy’ (reduced use, re-use, recycle) to local business engagement and support initiatives (e.g. work with traders in the Shire’s retail precincts to establish a ‘plastics free’ places program).	Ongoing	Ongoing	Circular economy based support initiatives provided to local business engagement	Circular economy based initiatives are maximised	Waste Matters Strategy, Sustainable Hornsby 2040
2.10	Explore means for Council to facilitate greater access to affordable housing in Hornsby Shire, including through its economic development advocacy and partnership functions.	Ongoing	Ongoing	Affordable Housing Strategy adopted	Better housing diversity and affordability in the Shire.	Affordable Housing Discussion Paper 2018
2.11	Work with and lobby the NSW Government to establish a State Government departmental location in Hornsby, to be incorporated into the Hornsby Town Centre revitalisation.	Medium	Long term <6 years	Campaign and strategy developed to attract government employees to work in the Hornsby Town Centre	Greater use of the Hornsby Town Centre for economic purposes and enhanced vibrancy.	Employment Lands
2.12	Investigate opportunities for a university campus and / or broader education and health hub to be incorporated into the Hornsby Town Centre revitalisation.	Medium	Long term <6 years	Campaign and strategy developed to target investment by a university or health providers in the relevant Hornsby Precinct.	Development of a health and/or wellbeing hub around the Hornsby Hospital Precinct.	Employment Lands

Theme 3: Destination Hornsby Shire

Strategic Objective

Position Hornsby Shire as a location of choice for visitors and events.

Rationale

Hornsby Shire's existing tourism product is strong, particularly focusing on the region's natural assets of the Hawkesbury River and estuary, national parks and bushlands. Hornsby Shire is well-located near the major market of Sydney to the south and the Central Coast to the immediate north.

The Shire's geographic location within the Greater Sydney area and good transport connections, coupled with its natural attributes including national parks, regional parks and the Hawkesbury River, means it already attracts strong visitation from outside of the region.

Hornsby Shire's natural attributes are supported by arts, music and galleries, a range of local markets and recreational activities. These include bushwalking trails, mountain bike trails, farm gate trails as well as river-based activities featuring the Riverboat Postman, houseboat hire, fishing charters, boat hire, canoe hire and water skiing. Tourism offers a range of other social and environmental benefits including conservation of natural areas and resources, provision of infrastructure that benefits residents as well as visitors and assisting local communities to maintain their traditions and identity.

Hornsby Shire's tourism and hospitality sector accounts for only 3.1 per cent of total employment compared to 6.5 per cent across NSW. The tourism and hospitality sector also falls short compared to the NSW average in its contribution to output and industry value-added. This suggests that, despite the Shire's natural and other attractions, there is scope to enhance the contribution of the visitor economy to economic development in Hornsby Shire.

This will require a focus on the 'enablers of a vibrant visitor economy', which includes a conducive natural, built and social/cultural environment; quality infrastructure; effective marketing and information management; and purposeful and collaborative governance.

Opportunities and Enablers

- Dedicated resourcing for tourism industry development.
- Coordinated tourism marketing and promotion involving Council as a partner with other key stakeholders.
- A clear vision and strategy for sustainable development of Hornsby Shire as a visitor destination.
- Development and management of key visitor areas to a tourism industry standard.
- Strong brand development.
- Further product and experience development.
- An increase in visitor numbers and length of stay that is sustainable.

DESTINATION HORNSBY SHIRE

ID No.	Tasks for Action	Priority (High, Medium, Low or Ongoing)	Estimated timeframe – subject to resourcing, funding and other priorities	Output	Outcome	Policy/strategy link
3.1	Formalise working relationships with local stakeholders, neighbouring Councils, regional tourism organisations and Destination NSW to promote and manage visitation to Hornsby Shire and the surrounding region. Specifically, develop a destination brand for the Hawkesbury, Hills, Central Coast and Hornsby Shire Council areas that positions the region as being at the 'heart of the Hawkesbury River'.	High	Short term <2 years	Destination brand developed for the region which includes the Hornsby Shire.	Council formally engages in destination marketing for the Shire.	Destination NSW Visitor Economy Strategy 2030
3.2	Co-ordinate marketing and promotion activities between the Hawkesbury, Hills, Central Coast and Hornsby Shire Councils underpinned by a network of tourism information centres (or portals) coordinated across local government area boundaries.	High	Short term <2 years	Agreed marketing and promotional plans for the region	Collaboration with regional partners	
3.3	Support Hornsby Shire's rural and river communities through delivery of the Rural Lands Strategy – including, potentially, the development of a separate Destination Management Plan (see Action 3.9).	High	Ongoing	Delivery of Rural Lands Strategy actions	Enhanced tourism and visitation opportunities in the rural parts of the Shire.	Rural Land Strategy
3.4	Improve access to the Hawkesbury River through the delivery of appropriate support infrastructure, including public moorings and jetties, parking facilities and pump out stations.	Low	Longer term <6 years	Strategy for river access infrastructure developed	Strategic approach to the provision of river based infrastructure adopted	NSW Government Ports Strategy, North District Plan
3.5	Develop a regional events strategy with signature food and wine and culture-based events	Low	Longer term <6 years	Regional event strategy	Strategic approach to growing visitation via events is available.	NSW Food & Wine Tourism Strategy & Action Plan 2018 - 2022
3.6	Explore opportunities to further develop and market Hornsby Shire as a location of choice for cycle tourism, mountain biking, bush walking and active recreation.	Medium	Short term <2 years	Plan for development and marketing of the shire's recreational opportunities.	Recreational opportunities included in destination marketing materials	Walking and Cycling Strategy
3.7	Further develop visitor experiences that celebrate Hornsby Shire's and the region's Indigenous and European histories and cultural heritage consistent with the Heritage Action Plan.	Medium	Medium term <4 years	Indigenous and European history visitor experiences in the Shire are identified and developed.	Indigenous and European history visitor experiences are included in destination marketing material.	Destination NSW Aboriginal Tourism Action Plan 2017 - 2020
3.8	As part of the LEP review, identify opportunities to facilitate the development of visitor accommodation in Hornsby Shire at appropriate locations. Inform this activity with an audit of existing accommodation across Hornsby Shire and neighbouring areas. This will require consultation with RFS to expand permissible tourism/visitor accommodation in high bush fire risk areas.	Medium	Longer term <6 years	Audit of existing accommodation Reviewed Local Environment Plan	Opportunities for visitor accommodation identified	Hornsby Local Environment Plan
3.9	Develop a Destination Management Plan for River and Rural Communities in conjunction with industry partners.	High	Short term <2 years	Destination Management Plan	Adopted and agreed process for building and managing the visitor economy.	Statewide Destination Management Plan (Destination NSW)
3.10	Progress an approach to developing a night-time economy in the Hornsby Town Centre.	Medium	Medium term <4 years	Night Time Economy Strategy	Strategic interventions to be implemented to grow the night time economy in the Hornsby Town Centre.	NSW Government 24 hour Economy Strategy
3.11	Commit to undertaking a Hornsby Shire visitor satisfaction survey every two years.	Low	Medium term <4 years	Visitor survey	Understanding of visitor experiences in the Shire.	

Strategy Implementation

5.1 Priorities for Action

Effective implementation must be cognisant of available resources and the capabilities of Council and its partner organisations to progress the opportunities identified. To allow for effective implementation over time, the opportunities presented in this strategy have been prioritised.

Priority projects and activities for implementation are identified having consideration for Council's available resources for promoting economic development and tourism in the context of its broader program of work and strategic objectives. From the long-list of actions identified in this strategy, the following five are Hornsby Shire Council's priority actions to be progressed over the first 12 to 24 months of this strategy:

1. Undertake a survey of small and home-based businesses to better understand the composition and needs of this sector.
2. Commence the development of a Smart Cities Strategy in conjunction with the ICT Strategy. Ensure that the Strategy meets place making requirements and addresses the needs of business.
3. Develop a Destination Management Plan for River and Rural Communities in conjunction with industry partners.
4. Progress an approach to developing a night-time economy in the Hornsby Town Centre.
5. Develop a strategic approach to enhancing business resilience in the Shire, including the drafting of a Disaster Recovery Plan.

Priorities will be reviewed on a year-to-year basis as resources become available.

5.2 Collaborative Partnerships for Effective Strategy Implementation

Collaborating to cultivate economic development partnerships is key to successful strategy implementation. Civic leadership and partnerships - what is otherwise known as 'collaborative governance' - is a theme underlying all matters concerning Hornsby Shire's sustainable economic development.

Civic leadership - a fundamental enabler of economic development - is characterised by collaborative and cooperative approaches to research, community engagement, knowledge-sharing, planning, project design and implementation of strategies and activities for the good of the Shire and its communities. Promoting collaboration is fundamental to the successful implementation of the Economic Development and Tourism Strategy, 2021-2026.

The strategy will be implemented by Hornsby Shire Council in partnership with the NSW Government, the Australian Government, regional development bodies, business and industry and other supporting partners. Internal and external reference groups and working committees will be established, when required and resourced to ensure ownership of the strategy and a commitment to its implementation.

To this end, Hornsby Shire Council will continue to collaborate with key stakeholders - including (but not limited to) Hornsby Chamber of Commerce, the Brooklyn Mooney Mooney Marketing Collective, the Bush Telegraph, Realise Business, Small Biz Matters, North Sydney Innovation Network, Hornsby Ku-Ring-Gai Community College, RDA Sydney, the Greater Sydney Commission, NSW National Parks and Wildlife Service and NSW Department of Industry and other relevant state and federal agencies on a regular basis - to gain support for and to help deliver the Economic Development and Tourism Strategy, 2021-2026.

Hornsby Shire's businesses and residents will continue to be engaged at a partnership level to ensure effective collaboration for the strategy's development and commitment to the delivery of the Shire's economic development agenda.

5.3 Immediate Priority: COVID-19 Economic Recovery Plan

In delivering this Economic Development and Tourism Strategy, 2021-2026, Hornsby Shire Council is focussed first and foremost on immediate-term initiatives to help address the impacts of COVID-19 on local businesses and the community, including:

- Providing local businesses with information on and access to services offering support for planning through adversity - including financial counselling, business continuity management, human resource management, taxation support, mental health support, etc. This includes support available through, for example, Business Connect, via the support services of Realise Business, through referrals to business training / re-training courses offered by Hornsby Ku-Ring-Gai Community College and via the networking and referral services offered by RDA Sydney.
- Supporting the initiatives of other organisations such as Northern Sydney Regional Organisation of Councils (NSROC), which is undertaking a survey of businesses in the region to better understand the impact of COVID-19, to inform business advocacy needs.
- Supporting local businesses by leveraging off the work of the Small Business Commissioner to investigate and promote local procurement options.
- Supporting local business start-ups and expansions by continuing to work to ensure (and promote) a supportive and enabling regulatory environment.
- Through its role as a local leader, restoring business confidence (and community confidence) by broadcasting positive messages about Hornsby Shire's economic recovery and local initiatives that are designed to support the recovery effort.

These initiatives are being delivered in the context of a longer-term strategic framework for economic development and tourism promotion and facilitation.

5.4 Monitoring Strategy Progress

The Economic Development and Tourism Strategy, 2021-2026 has been prepared in the context of the role of economic development in Hornsby Shire Council's broader program of work and strategic objectives, and wider regional priorities. Council will monitor the progress of strategy implementation in order to achieve the actions set out. Performance measures will be set using a range of indicators, including both 'output' indicators and 'outcome' measures.

Outcome measures refer to broad development outcomes at the Shire level, such as industry output, business establishments growth and jobs. Measures for individual action items will be identified and reported on via Council's Operational Plan depending upon which elements of the Strategy are prioritised and funded in each Operational Plan.

Output indicators include, for example, levels of business confidence, community satisfaction, numbers of investment enquiries, strategy/action milestones and project progress and completion. Targets set out in this strategy will be monitored through the following methods and sources:

- Business surveys;
- Customer / visitor satisfaction surveys;
- Subscription to regularly updated and tailored data sources such as profile.id and economy.id;
- Quarterly Labour Force Survey data on unemployment and labour force trends; and
- Australian Bureau of Statistics Business Register data.
- Economic Development Australia Evaluation and Measurement Toolkit

The set performance measures will be reported annually within the performance monitoring on the strategy's implementation. The Economic Development and Tourism Strategy, 2021-2026 will be reviewed annually with an update anticipated in five years.

References

Australian Government, National Skills Commission (2020), Small Area Labour Markets, March Quarter 2020

Australian Manufacturing Growth Centre Ltd (2017), Advanced Manufacturing, A New Definition for A New Era

Clouston Associates (2015), Active Living Hornsby Strategy, prepared for Hornsby Shire Council

Greater Sydney Commission (March 2018), Our Greater Sydney 2056, North District Plan – Connecting Communities

Greater Sydney Commission (March 2018 Updated), Greater Sydney Region Plan, A Metropolis of Three Cities – Connecting People

HillPDA (May 2018), Hornsby Employment Land Use Study (Draft), prepared for Hornsby Shire Council

Hornsby Shire Council (June 2018), Your Vision Your Future, Hornsby Shire Community Strategic Plan 2018-2028

IBISWorld (3 June 2020), COVID-19 Economic Assessment

IBISWorld (June 2020), Tourism in Australia

Lennon, S. (August 2017), In Pursuit of Prosperity: Local Government and Economic Development, in Local Government Focus, Volume 33, Number 8

Lennon, S. (November 2016), The Economy in Space: Local Government Planning and Economic Development, in Local Government Focus, Volume 32, Number 11

Lennon, S. and Gibbins, R. (April 2019) How to Grow Your Region's Slice of Australia's Tourism Pie by Leveraging the Enablers of a Vibrant Visitor Economy, in Economic Development, Volume 12, Issue 1

NSW Government (August 2018), Visitor Economy Industry Action Plan 2030

NSW Government, Transport for NSW (2018), Future Transport Strategy 2056

Pugalis, L., Tan, SF. (2017), The Role of Local Government in Local and Regional Economic Development, University of Technology Sydney

The Stafford Group (2015), Statement of Tourism Opportunities for Hornsby Shire, prepared for Hornsby Shire Council United Nations Environment Programme (2008), Green Jobs: Towards decent work in a sustainable, low-carbon world

abs.gov.au/ausstats/abs%40.nsf/mediareleasesbyCatalogue/C9973AC780DDFD3FCA257F690011045C?OpenDocument, viewed 3rd September 2020

information-age.com/iot-developing-smart-cities-123463276/, viewed 16th December 2019

economy.id.com.au/hornsby, viewed 17th December 2019

economy.id.com.au/hornsby/tourism-visitors-reason?Tourismtype=1, viewed 17th December 2019

economy.id.com.au/hornsby/tourism-visitors-reason?Tourismtype=2, viewed 17th December 2019

forecast.id.com.au/hornsby, viewed 17th June 2019

destinationnsw.com.au/our-industry/economic-value, viewed 17th June 2019

ibisworld.com/, viewed 19th August 2020

qut.edu.au/creative-industries/about/what-are-the-creative-industries, viewed 14th June 2019

rba.gov.au/publications/smp/2020/may/economic-outlook.html, viewed 14th August 2020

thebusstele.com.au/hkvg/, viewed 18th June 2019



NEED HELP?

This document contains important information. If you do not understand it, please call the Translating and Interpreting Service on 131 450. Ask them to phone 9847 6666 on your behalf to contact Hornsby Shire Council. Council's business hours are Monday to Friday, 8.30am-5pm.

Chinese Simplified

需要帮助吗?

本文件包含了重要的信息。如果您有不理解之处，请致电131 450联系翻译与传译服务中心。请他们代您致电9847 6666联系Hornsby郡议会。郡议会工作时间为周一至周五，早上8:30 - 下午5点。

Chinese Traditional

需要幫助嗎？

本文件包含了重要的信息。如果您有不理解之處，請致電131 450聯繫翻譯與傳譯服務中心。請他們代您致電9847 6666聯繫Hornsby郡議會。郡議會工作時間為周一至周五，早上8:30 - 下午5點。

German

Brauchen Sie Hilfe?

Dieses Dokument enthält wichtige Informationen. Wenn Sie es nicht verstehen, rufen Sie bitte den Übersetzer- und Dolmetscherdienst unter 131 450 an. Bitten Sie ihn darum, für Sie den Hornsby Shire Council unter der Nummer 9847 6666 zu kontaktieren. Die Geschäftszeiten der Stadtverwaltung sind Montag bis Freitag, 8.30-17 Uhr.

Hindi

क्या आपको सहायता की आवश्यकता है?

इस दस्तावेज़ में महत्वपूर्ण जानकारी दी गई है। यदि आप इसे समझ न पाएँ, तो कृपया 131 450 पर अनुवाद और दुभाषिया सेवा को कॉल करें। उनसे हॉर्न्सबी शायर काउंसिल से संपर्क करने के लिए आपकी ओर से 9847 6666 पर फोन करने का निवेदन करें। काउंसिल के कार्यकाल का समय सोमवार से शुक्रवार, सुबह 8.30 बजे-शाम 5 बजे तक है।

Korean

도움이 필요하십니까?

본 문서에는 중요한 정보가 포함되어 있습니다. 이해가 되지 않는 내용이 있으시면, 통역번역서비스(Translating and Interpreting Service)로 전화하셔서(131 450번) 귀하를 대신하여 혼즈비 셔 카운슬에 전화(9847 6666번)를 걸어 달라고 요청하십시오. 카운슬의 업무시간은 월요일~금요일 오전 8시 30분~오후 5시입니다.

Tagalog

Kailangan ng tulong?

Itong dokumento ay naglalaman ng mahalagang impormasyon. Kung hindi ninyo naiintindihan, pakitawagan ang Serbisyo sa Pagsasalinhika at Pag-iinterpretate (Translating and Interpreting Service) sa 131 450. Hilingin sa kanilang tawagan ang 9847 6666 para sa inyo upang kontakin ang Hornsby Shire Council. Ang oras ng opisina ng Council ay Lunes hanggang Biyernes, 8.30n.u.-5n.h.

Hornsby Shire Council

ABN 20 706 996 972

Contact us

PO Box 37

Hornsby NSW 1630

Phone: **(02) 9847 6666**Fax: **(02) 9847 6999**Email: **hsc@hornsby.nsw.gov.au****hornsby.nsw.gov.au****Visit us**

Hornsby Shire Council Administration Centre

296 Peats Ferry Road, Hornsby NSW 2077

Office hours: Please check the website for the latest opening hours for the Customer Service Centre and Duty Officer.

Disclaimer

Every effort has been made to provide accurate and complete information. However, the authors assume no responsibility for any direct, indirect, incidental, or consequential damages arising from the use of information in this document.

Copyright Notice

No part of this publication may be reproduced in any form, or stored in a database or retrieval system, or transmitted or distributed in any form by any means, electronic, mechanical photocopying, recording, or otherwise without written permission from Hornsby Shire Council. All rights reserved.

Copyright © 2021, Hornsby Shire Council

