SHOROC

State of the Economy Report:

A Working Document

Prepared by the SHOROC SoE Working Group

on behalf of the SHOROC Executive

March 2004

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MESSAGE FROM THE CHAIR

I have much pleasure in introducing the SHOROC State of the Economy Report providing a snapshot of our region which comprises the Mosman, Manly, Pittwater and Warringah local government areas.

The Report is a compilation of statistical information using data collected by our four member Councils. It is a working document and provides a starting point for key agencies, industry and business, and members of the community in understanding our region.

I wish to thank the members of the SHOROC State of the Economy Working Group for their efforts in producing this Report.

The documentation of this information represents the first stage in an ongoing process of refinement. We will continue to collate relevant quantitative, qualitative and anecdotal information, particularly where statistical gaps have been identified, and also share this new information as it comes to hand.

Yours sincerely

Jean Hay AM
SHOROC Chair
Mayor of Manly

ACKNOWLEDGEMENTS

SHOROC would like to thank all the contributors to the report for their effort and enthusiasm. Special thanks to the SHOROC State of the Economy Working Group members:

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EXECUTIVE SUMMARY

- The SHOROC region comprises the four local government areas of **Mosman, Manly, Warringah and Pittwater** located on Sydney's Northern Beaches Peninsula (NBP), covering an area of **288 square kilometres**. Together these councils represent over **260,000 residents** (Census 2001), the majority of residents living in the Warringah local government area (136,662).

- There are some **gaps in available regional data,** particularly economic data, which needs to be addressed as this may inhibit sustainable planning processes.

- The average age of residents in the region is increasing at a higher rate than the national or state average. **Residents aged 65+ accounts for 14% of the population**, compared with 11% for the greater Sydney region.

- The **high usage of private motor vehicles by residents and visitors to this region** reflects major transport issues. It's anticipated that without a corresponding increase in local jobs, any **population growth will be car dependent.**

- The region boasts a **high employment participation rate** that compares favourably with other metropolitan Council areas, with 64% of workers employed full-time and 33% employed part-time. The region's **low unemployment rate of 3.4%** (ranging between 3.9% - 3.1% across our four Councils) is half the national average.

- The Property and Business Services Sector (31%) and the Retail Sector (21%) are the major employment providers in the region. An estimated **82.3% of businesses are classified as very small businesses employing less than five (5) people** compared to 72.3% of all businesses in the Sydney region being classified as very small.

- While it's difficult to quantify the number of **home based businesses**, from anecdotal evidence this appears to be very high.

- The region is continuing to attract **new age industries**, including I.T. and Tourism & Leisure, which are generating new employment opportunities for our resident workforce.

- The **cost of housing** is forcing low and middle-income earners to live in areas outside the region, even though job opportunities exist for unskilled and semi-skilled workers, and lower-paying professions, particularly in the provision of 'essential services' such as transport, nursing, retail and child care. It's unlikely that improved transport will solve all of our labour shortages, as people will only travel so far to work in low-paying professions.

- An interesting challenge for the region is **access to tertiary education facilities**, in particular universities; and the provision of home-based learning opportunities via access to state-of-the-art Information Technology and Telecommunications systems.

1. INTRODUCTION

The Shore Regional Organisation of Councils (known as SHOROC) represents the four Councils of Mosman, Manly, Warringah and Pittwater situated on Sydney's Northern Beaches Peninsula.

The SHOROC Executive supports a strategic approach to planning for sustainable growth in our region, and an important part in that planning process is being able to make informed decisions.

This initiative was driven by our need to more fully understand our regional demographics and emerging trends that may impact on the provision of new infrastructure, resource sharing and service delivery.

The SHOROC State of the Economy Report is a working document. It is a compilation of statistical data collected by our four member Councils and it provides a starting point for other agencies, businesses and members of the community in understanding our region.

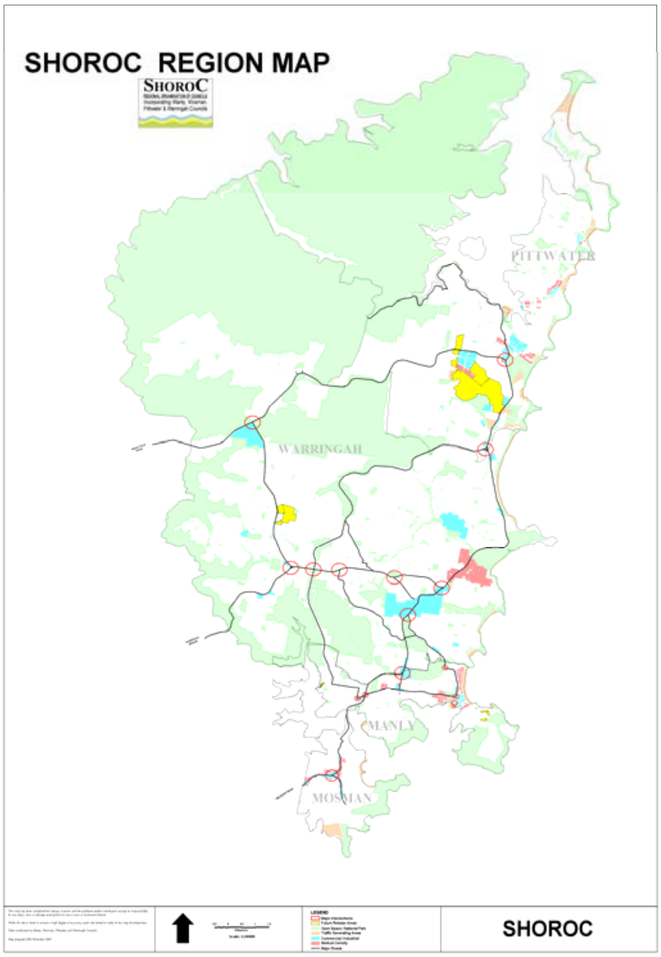
We will continue to collate information, particularly where statistical gaps have been identified, and refine this working document.

Areas of special interest may be subject to more detailed analysis following consideration of the information contained in this report.

This document represents a first and significant step towards understanding the challenges and issues in managing growth in the SHOROC region.

1.1 Overview of each Local Government Area

The review considers the SHOROC region, which is, comprised of four Local Government Areas - Manly, Mosman, Pittwater and Warringah.



Manly

Manly is located at the southern end of the Manly Warringah Peninsula of the Northern Beaches, immediately to the north and west of the entrance to Sydney Harbour. It has a population of 39,390. The area is 15.14km² and has a boundary of 39.4km, of which 29.9km is a water margin. No part of Manly is more than 1km from either the Harbour or the ocean.

Manly has a rich and diverse character of residential, business, industrial and natural landscapes. The area is well known for its natural environment, with areas such as the Sydney Harbour foreshores, North Head and frontage to the Pacific Ocean being recognised as important and sensitive environments.

Both the natural and developed land uses contribute to making Manly an attractive place for permanent residents and visitors alike.

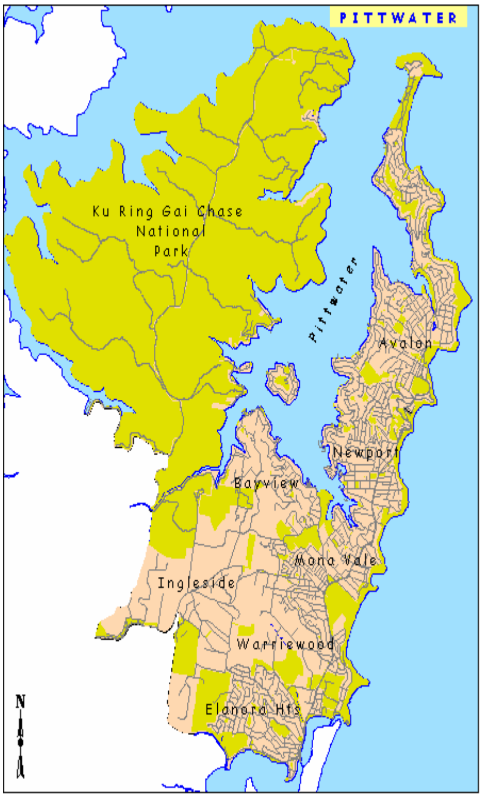
Mosman

Mosman is an historic harbour side area of 8.7 square kilometres with a population of 28,027. It is almost completely surrounded by the waters of Sydney and Middle Harbours and is only 6km north of the Sydney CBD with ready access by bus and ferry. Due to its pristine harbour beaches, national parks and the international tourist attraction of Taronga Zoo, Mosman receives many visitors. It is a high socio-economic area offering the best quality retail and restaurants, smart cafes and designer boutiques. It is also renowned for its cultural scene including Mosman Art Gallery, Mosman Library and many retail galleries and antique shops.

Mosman offers sparkling beaches and some spectacular and easy bushwalks through Bradleys Head and Middle Head, part of Sydney Harbour National Park. The headland at Parriwi overlooks beautiful Middle Harbour as well as the extremely busy traffic routes carrying 70,000 vehicles every day through the Spit/Military Roads corridor.

The northern shores of Mosman include the Spit with its yachting facilities, clubs and restaurants. To the west is the busy retail area of Cremorne Junction along with the Spofforth Street shops. To the east at Balmoral there is a range of high quality restaurants and cafes. At Spit Junction there is medium sized shopping centre, Bridgepoint containing a range of shops and a suite of business offices. The ridgelines of Mosman are home to several sophisticated retail shopping strips, notably at Spit and Mosman and Parriwi Junctions.

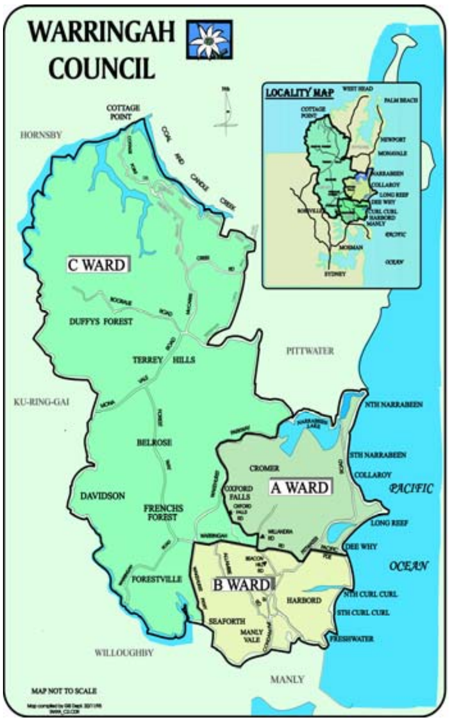
Three Aboriginal clans lived in Mosman. The Boregal clan inhabited the Bradleys Head area, the Gorualgal from Chowder Bay to Georges Heights and the Birrabirragal were at Middle Head and the Spit. The Cameragal clan was also influential in Middle Harbour. During early European settlement, Bungaree the Aboriginal leader and his family, resided along the Sydney Harbour foreshores His bust is erected at the entrance to the Civic Centre facing a bust of Archibald Mosman after whom the area is named.



Pittwater

The Local Government Area covers 125 sq kms at the northern end of the peninsula with 18 sq kms of waterways and 9 surfing beaches. It has a population of 59,413 at June 2003 which will grow to approx 65,506 by 2011 through a combination of additional in-fill development and the residential land release in Warriewood Valley. Development in Pittwater ranges from large open properties, light industrial sites to some medium density housing. The natural contrasts of the Pittwater environment are matched by the commercial environment where corner stores, providing a valuable service to their local community, co-exist with leading edge technology companies successfully competing in international markets. There is no major heavy industry located in this Local Government Area with the majority of commercial activity being confined to smaller scale, industrial and commercial businesses.

Pittwater and the Northern Beaches area was the land of the Garigal and Cannalgal people, part of the Guringai language group. There were many Aboriginal sites in the Pittwater area. Although much evidence has disappeared with European settlement, some traces of Aboriginal heritage remain. Throughout Pittwater, especially in Ku-ring-gai Chase National Park, there are Aboriginal sites, including middens, axe-grinding grooves, cave art sites and rock engravings and is now home to people from all over the world including the United Kingdom and Europe and in more recent times, the Pacific islands and Asia.



Warringah

The Local Government Area of Warringah is centrally located on Sydney's northern beaches and is home to 136,662 residents. It covers 153 square kilometres and supports a diverse range of businesses and light industry.

Warringah is surrounded by natural bushland. Its unique and spectacular natural environment contributes to a distinctive sense of place and quality of life for residents. In total, the area comprises 5,900 hectares of bushland and reserves, and 185 hectares of coastal foreshores including sand, foreshore dunes, lagoons and bluffs.
There are also many features of cultural and heritage significance, including aboriginal sites.

Originally the home of the Kuring-gai Aboriginal people, this place continues to hold significance for Indigenous Australians. Visited by Governor Phillip in 1788, Warringah is now home to people from all over the world including the United Kingdom and Europe and in more recent times, the Pacific islands and Asia.

2. ECONOMIC PROFILE

The economy of the SHOROC region is healthy, self sufficient in many ways and has had a low unemployment rating for some 15 years which is not seen as changing in the next 10 or so years. It was running at 3.4% for the region in 2001 (a variation from 3.9% - 3.1% in each local government area).

The issues raised from an overview of the total region are listed in Section 3 (Page 17) of this report but in general, the semi-skilled and unskilled workforce is most difficult to access because of housing costs and transport issues. Many employees in the region are local and travel to work in the region. However, some employees travel great distances from other LGA's to work in the SHOROC region using both public transport and motor vehicle.

The major segment of industry is that of organisations with 5 or less staff - with some major exceptions.

Retail in the region is one of the higher employers but is different in each Local Government Area.

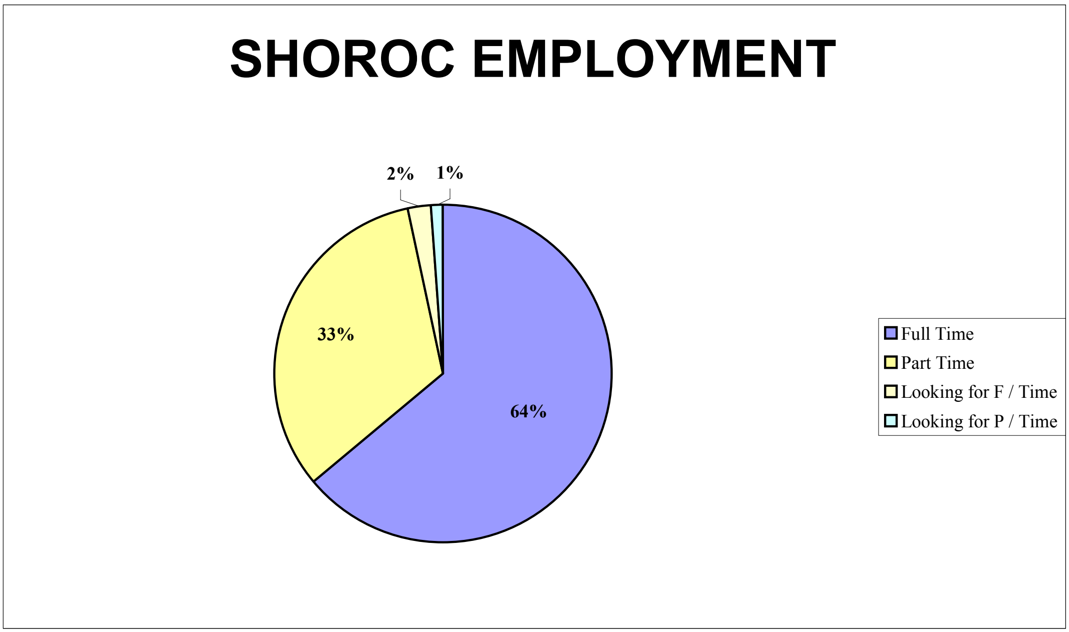
Educational services vary with a lack of tertiary institutions, thus requiring many local students to travel significant distances for their tertiary education.

Tourism activity varies throughout the region but still requires management and accommodation provision.

2.1 Employment

The region maintains a high employment participation rate either on a full or part time basis. This has remained static for a long period of time and compares very favourably with other metropolitan Local Government Areas. Akin to this figure is the unemployment rate of 3.4% which is about half the national average. Table 1 indicates the low unemployment in the region.

Table 1: Employment Rate

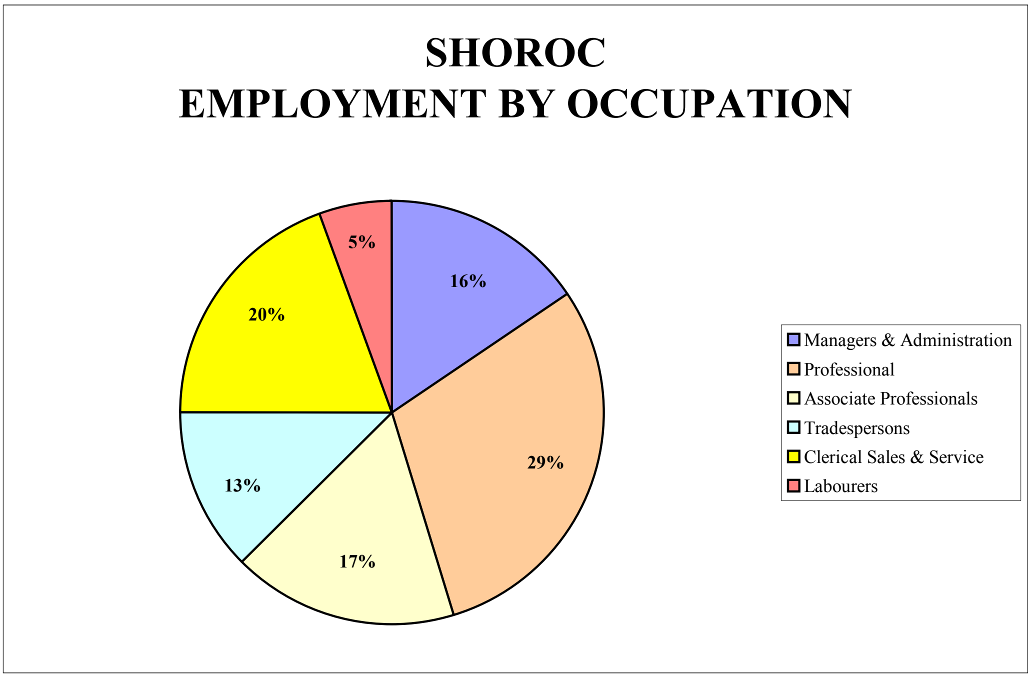


Source: ABS Census 2001

2.2 Occupation

As illustrated in Table 2, professional people now constitutes 29% of the SHOROC workforce and this is in a growth phase. This again in part relates to education levels, lifestyle and cost of housing. Another influencing factor is the strong need for support to the other key industry groups and the extensive range of small businesses located throughout the region. Other key sectors are those employed as trades people or in the retail and clerical areas.

Table 2: Employment by Occupation

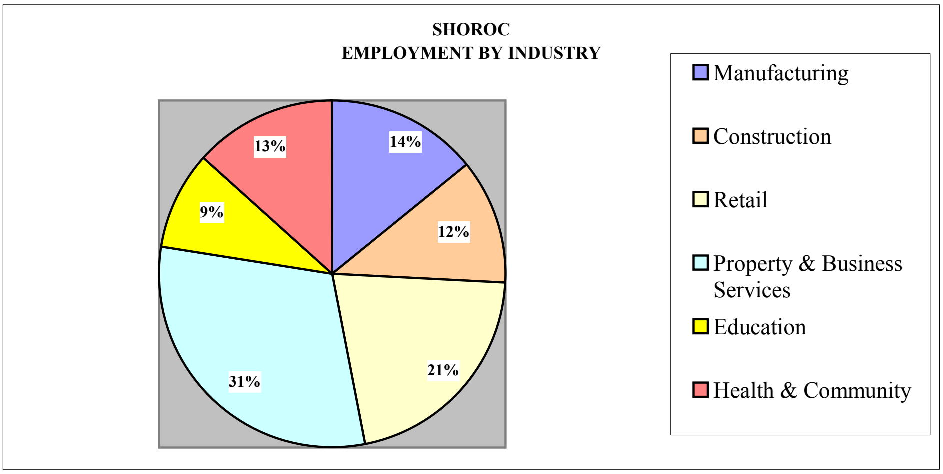


Source: ABS Census 2001

These figures reinforce the perception by key business groups in SHOROC that it is generally difficult to obtain local unskilled or semi-skilled staff. It would seem that this has been exacerbated by the high cost of housing in the region causing younger people, low and middle income earners to obtain more affordable housing elsewhere. If this trend continues it is likely to have long-term detrimental effects on the competitiveness of the local economy, leading to disruption in essential services, and labour shortages in some key industries becoming chronic.

2.3 Employment by Industry

Table 3: Employment by Industry



Source: ABS Census of Population & Housing

Consistent with national trends, there is some movement from labour intensive industries to knowledge based businesses. The percentage of the Australian workforce employed in the manufacturing sector has continued to fall over the past twenty years. The most significant and fastest growing component of the Australian economy involves knowledge based and services oriented businesses. This sector includes communication services, finance and insurance services, property and business services, retail and wholesale, health and community services and education. These industries have displayed an annual growth of more than 2% over the past decade.

Property and Business Services is the major industry of employment in SHOROC and is growing, accounting for 31% of the major employment industries in SHOROC.

Also significant is the retail industry with 21%, the second largest industry in the region. Warringah Mall is a very large regional Shopping Centre and dominates the retail sector. This complex no doubt draws a large “in shopping” component from the rest of the region. Warriewood Square and Bridgepoint at Mosman are smaller retail complexes and most other centres, though varying in size, are village based.

The spread of retail, manufacturing, hospitality, professional and service industries through out the region identifies some differences which impact the employment by industry.

1. Retail - the existence of the major shopping squares of Warringah Mall and Warriewood Square may impact on the smaller village centres and the type and mix of products they sell.

2. Manufacturing is centred around Burnt Creek, Brookvale, Frenchs Forest, Terrey Hills, Mona Vale and Warriewood Valley. The automotive industry is mostly centred on Brookvale. Technology is centred in Frenchs Forest and Terrey Hills. Warriewood/Mona Vale has attracted 2 major medical supply firms and smaller clean industry outlets.

3. There are some very large key companies in the region such as Oroton, Blackmores. Maersk, Pirelli Cables, Roche, Dell Computers, YKK, Getronics (Wang) and Panasonic Points 2 and 3 make up a large manufacturing and distribution base and 14% of the employment by industry in SHOROC.

4. The Warringah and Pittwater business districts have an extensive range of activities varying from manufacturing to service industries with a particularly strong automotive presence in Brookvale. There is evidence of some decline in the manufacturing industry which can generally be attributed to national trends and the inability to expand because of the limited labour skills base for these industries.

5. Health Care at 13% is also a strong employer in the region with many aged care facilities, two major hospitals and support services throughout the region mostly in Mosman, Manly, Dee Why and Mona Vale.

6. Tourism is strongly focussed on the southern end of the region with Manly leading in the provision of accommodation and restaurants, Mosman home to the Taronga Zoo which employs 512 staff, while the northern end of the region has less hotel and motel accommodation and more B&B style.

7. Professional services - property and business services thrive throughout the region and according to the ABS Census 2001, there are at least 8% of people working from a home base. These are a difficult group to identify but are known to include government workers, financial advisers, health and alternate health workers and tradespeople.

2.4 Travel to Work, Origin and Destination Information

Traffic and transport issues are significant in the SHOROC region with a number of studies being undertaken, most recently the Working Paper 53 – Improving Transport on the Warringah Peninsula: Issues and Options 2003 prepared by the Bureau of Transport & Regional Economics (Department of Transport and Regional Services).

Major connecting roadways within and out of the region are congested and there is strong reliance on the car and public transport by bus using the roadways.

The main exits from the region are Spit Bridge and Military Road, Warringah Rd, Wakehurst Parkway and Mona Vale Road.

Current plans to widen Spit Bridge by 2 lanes and recent improvements to Mona Vale Rd at Ingleside are two of the issues affecting SHOROC.

Reliance on public transport to travel to work is demonstrated below in Table 4.

Table 4: Shares of Journeys to Work Using Public Transport

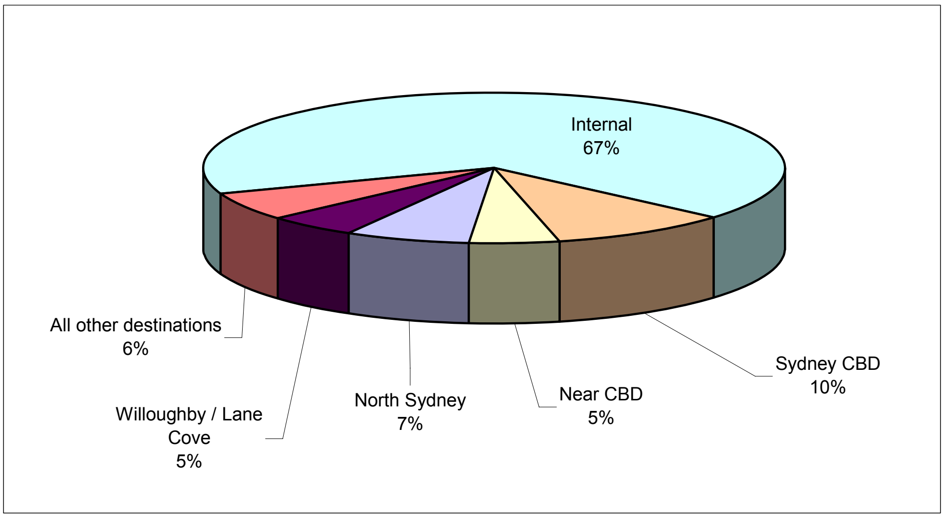
Manly	Mosman	Pittwater	Warringah	SHOROC region	Average for Sydney SD
29%	22.5%	12%	17%	20%	23%

Source ABS 1996 Census

Shorter trip distances in Manly and Mosman relative to the areas to the north might help explain the contrasts shown. The assumption is that the areas to the north would favour car travel because of inadequate public transport.

Tables 5, 6 & 7 indicate that 67% of trips beginning in the SHOROC area in peak times are internal to the region.

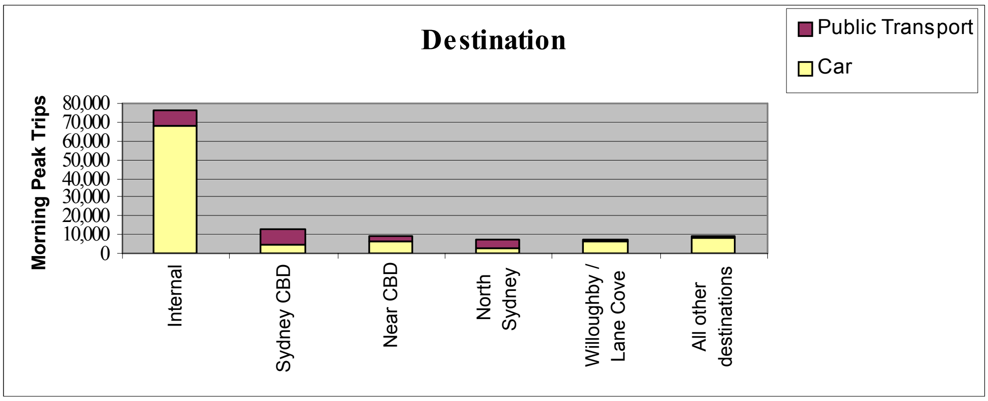
Table 5: Destination of Peak Trips Beginning in SHOROC Region



Source: BTRE analysis of Dept of Transport, Transport data Centre, 2000 Household Travel Survey.

Reliability of travel to, within and from the region is an issue that affects economic efficiency. Car travellers and to a certain extent, bus travellers experience severe congestion travelling within, into and out of the SHOROC region, especially, though by no means exclusively, in the morning peak. A recognised consequence of congestion is that trip times become unreliable. This applies to public transport users also, to the extent that buses use general traffic lanes rather than bus priority lanes or to the extent that road crashes and other incidents impede traffic flow in the bus lane. From an economic perspective, this affects deliveries, transport of goods and arrival and departure times.

Table 6: Car & Public Transport Trips Beginning in SHOROC Region



Source: BTRE analysis of NSW Dept of Transport, Transport Data Centre, 2000 Household Travel Survey

Car travel is predominantly internal to the region with a very even spread elsewhere in Sydney. N.B. The volume of car travel to Sydney CBD, near CBD and North Sydney (14,300 trips) is over half that of the total SHOROC region bus passenger market, suggesting scope for public transport to improve its overall share.

Table 7: Morning Peak Trips by Public Transport – Share of Destination

Morning Peak 7.00-9.00	Trips from region	Public transport	Bus	Ferry	Train
Internal	94,300	8%	8%	0%	0%
To Sydney CBD	13,900	58%	42%	14%	3%
To North Sydney	10,200	28%	24%	0%	4%
To near CBD	7,300	45%	19%	9%	17%
To Willoughby/Lane Cove	6,500	20%	20%	0%	0%
All other destinations	9,000	8%	2%	4%	2%
All destinations	141,200	17%	13%	2%	2%

Source: BTR analysis of NSW Dept of Transport, Transport Data Centre, 2000 Household Travel Survey

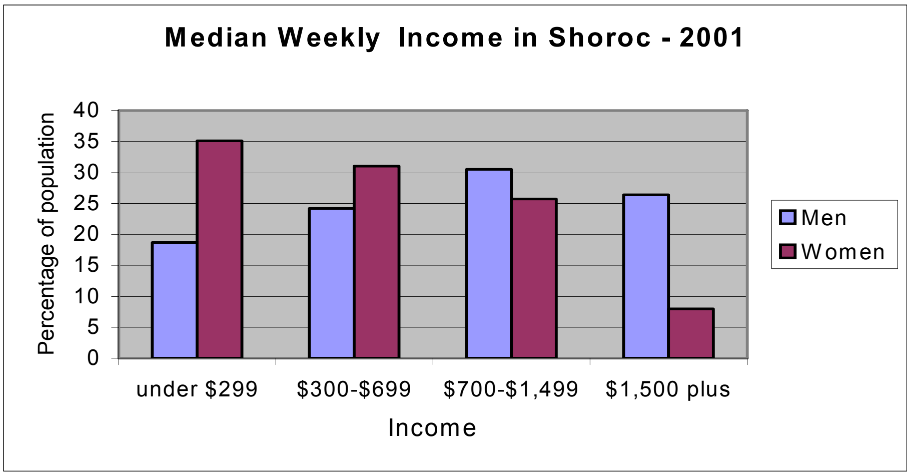
a. ***Individual modes may not add to public transport total share due to rounding.***
b. ***For trips with multiple modes, the hierarchy is (high to low); ferry, train, bus, car driver, car passenger, other.***

Growth in small courier and food deliveries is anticipated from direct mail shopping, Internet shopping adding to the usual deliveries from supplier's external to the region.

The expansion of residential areas like Warriewood Valley must increase demand on road usage and public and private services.

2.5 Individual Income

Table 8: Median Weekly Income by Gender 2001



Source: ABS Census 2001

According to the Australian Bureau of Statistics Census 2001 the median weekly income for the SHOROC Local Government Areas was:

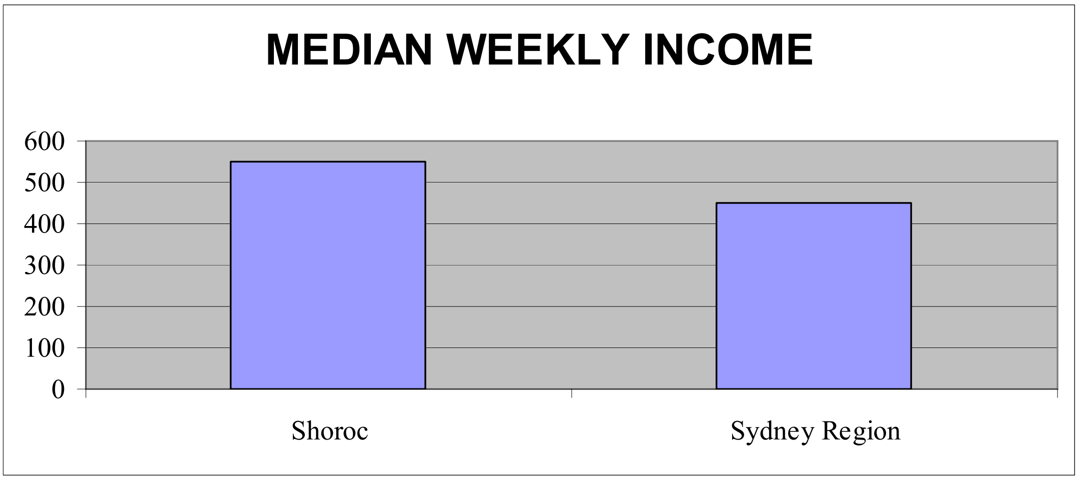
Manly
The median weekly income for people aged 15 and over in 2001 was in the range from $600-$699.

Mosman
The median weekly income for people aged 15 and over in 2001 was in the range from $700 to $799.

Pittwater
The median weekly income for people aged 15 and over in 2001 was in the range from $500 to $599.

Warringah
The median weekly income for people aged 15 and over in 2001 was in the range from $500 to $599.

Table 9: Median Weekly Income



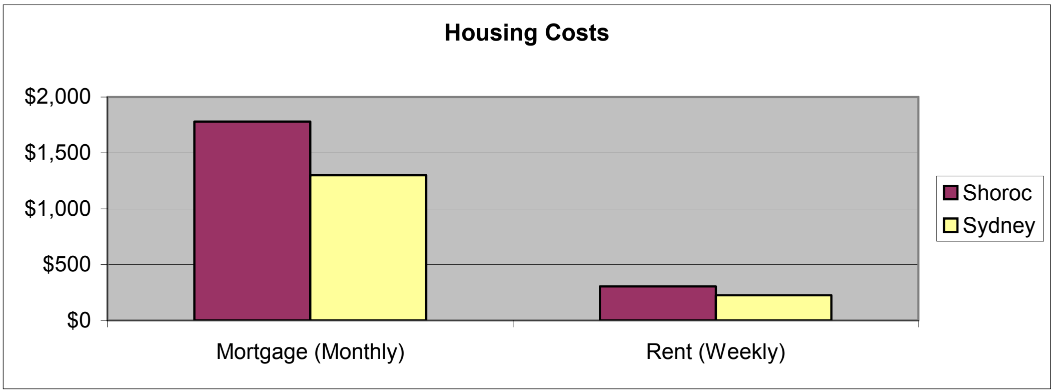
Source: ABS Census 2001

Table 9 indicates a marked difference between the median weekly income for the four SHOROC Local Government Areas and that of Sydney Region.

2.6. Dwellings

Table 10: SHOROC Housing Costs

(Median monthly mortgage repayments and weekly rent payments for SHOROC region compared with Sydney region)



Source: ABS Census 2001

Table: 11 Proportion of private dwellings that are owned or being purchased, and rented, SHOROC 1991-2001

	Dwelling type	Manly	Mosman	Pittwater	Warringah
1991	Fully owned or being purchased %	59	57	73	71
	Rented %	34	35	20	23
1996	Fully owned or being purchased %	58	58	73	69
	Rented %	35	35	20	25
2001	Fully owned or being purchased %	56	58	73	68
	Rented %	33	34	18	25

Source: ABS Census 2001

Table 11 reflects over the 10 year period 1991-2001, minor variations in the ratio of private dwellings fully owned or being purchased to rent.

2.7 Maps of Business & Industrial Areas

Key: Business -

Industrial -

2.7.1 Manly

IPLAN Land Review Mapping 2003

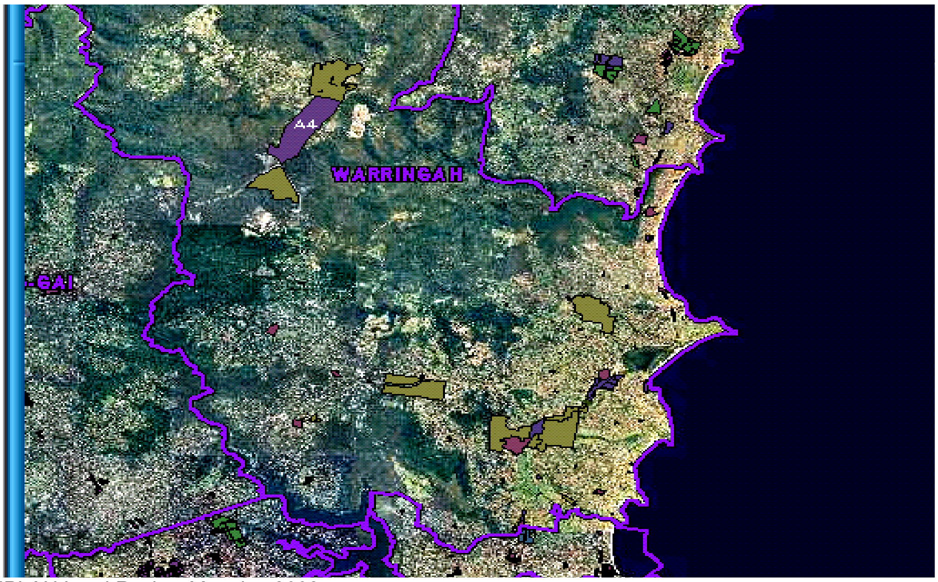
2.7.2 Mosman

IPLAN Land Review Mapping 2003

2.7.3 Pittwater

IPLAN Land Review Mapping 2003

2.7.4 Warringah



IPLAN Land Review Mapping 2003

2.8 Computers and the Internet

Manly

- In the week preceding the 2001 census, just over half (50.1%) of Manly residents had used a computer at home, compared to 43.7% in the Sydney region. Of these computer users in Manly 24% were under 19 years, 48.1% were aged between 20 and 44 years, and 22.1% were aged between 45 and 64 years of age.

- In the week preceding the 2001 census, 53.6% of Manly residents had used the Internet, and of these, 41.6% of users accessed the Internet only at home, 19.1% only at work, and 25.2% both at home and at work.

Mosman

- In the week preceding the 2001 census, 58.0% of Mosman residents had used a computer at home. Of these computer users in Mosman 25% were under 19 years, 39.1% were aged between 20 and 44 years, and 25.9% were aged between 45 and 64 years of age.

- In the week preceding the 2001 census, 61.6% of Mosman residents had used the Internet, and of these, 40.7% of users accessed the Internet only at home, 19.5% only at work, and 27.6% both at home and at work.

Pittwater

- In the week preceding the 2001 census, 52.3% of Pittwater residents had used a computer at home. Of these computer users in Pittwater 29.5% were under 19 years, 44.3% were aged between 20 and 44 years, and 26.7% were aged between 45 and 64 years of age.

- In the week preceding the 2001 census, 48.6% of Pittwater residents had used the Internet, and of these, 52.9% of users accessed the Internet only at home, 14.6% only at work, and 22.4% both at home and at work.

Warringah

- In the week preceding the 2001 census, 49.0% of Warringah residents had used a computer at home. Of these computer users in Warringah 29.0% were under 19 years, 44.3% were aged between 20 and 44 years, and 22.7% were aged between 45 and 64 years of age.

- In the week preceding the 2001 census, 46.9% of Warringah residents had used the Internet, and of these, 49.0% of users accessed the Internet only at home, 16.2% only at work, and 22.6% both at home and at work.

3. POPULATION ESTIMATES/DEMOGRAPHICS

3.1. Overview

This data is extracted from the 2001 Census of Population and Housing, conducted in August 2001 by the Australian Bureau of Statistics (ABS). The census data is based on place of enumeration, or where every person who was counted spent Census night. Unless otherwise stated, figures in this summary exclude overseas visitors. Comparisons are also made with the Sydney Statistical Division, (referred to within this document as 'Sydney region', and which includes the statistical subdivisions of Gosford - Wyong in the north, to Outer Western Sydney and Outer South Western Sydney in the south).

The figures in this section show the *estimated resident population* for the area. The ABS uses a range of statistical methods to arrive at this estimate, which takes account of such factors as births and deaths, and those out of the area on Census night. So the estimates in Section 1 differ to the figures in the subsequent sections, which show Census night counts only. (The ABS regards the overall population estimates as more accurate than the Census night counts, but the estimates apply only to the total population count and not to the many sub-categories for each LGA.)

The official estimated resident population for the SHOROC LGAs as of June 2001 (based on the 2001 Census) are:

Table 12: SHOROC Population & Density in 2001

COUNCIL	POPULATION (2001)	AREA (km^2)	POPULATION DENSITY (pers/km^2)
Manly	39,390	15.14	2602
Mosman	28,027	8.7	3222
Pittwater	56,642	125	453
Warringah	136,662	153	893
TOTAL	**260,721**	**301.84**	**864**

The population of the region grew at 0.8% a year between 1996 and 2001.

3.2 Age Profiles

The average age of residents in the region is increasing at a higher rate than national or state average. This is particularly the case in Warringah where the combined effects of retirement village development and escalating housing prices have lead to a significant increase in proportion of the population aged 65 and over.

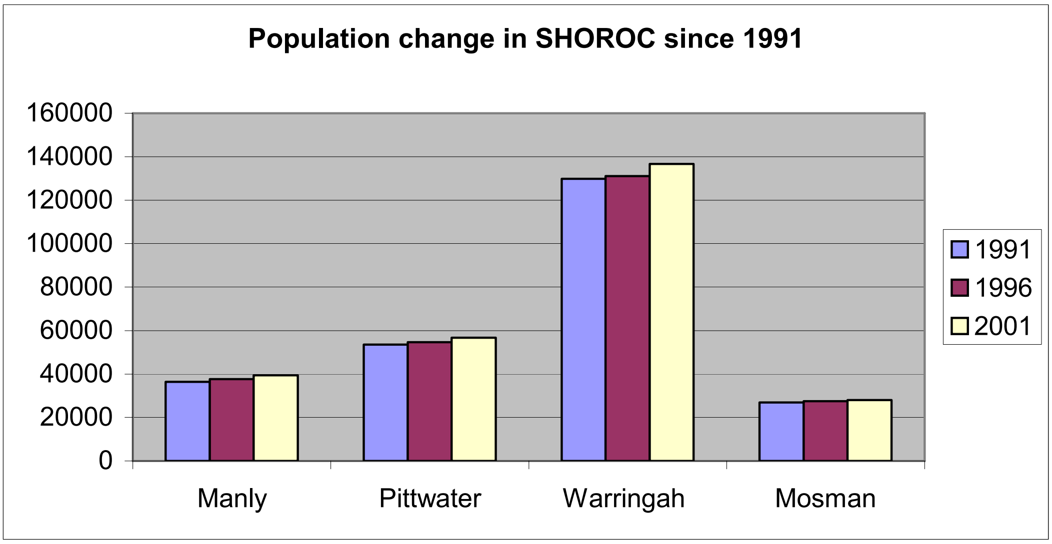
Table 13: Population change in SHOROC region since 1991

	Manly	Pittwater	Warringah	Mosman
1991 Estimate	36 425	53 507	129 777	26 826
1996 Estimate	37 703	54 648	131 109	27 452
2001 Estimate	39 390	56,642	136 662	28 027

Source: ABS Census 2001

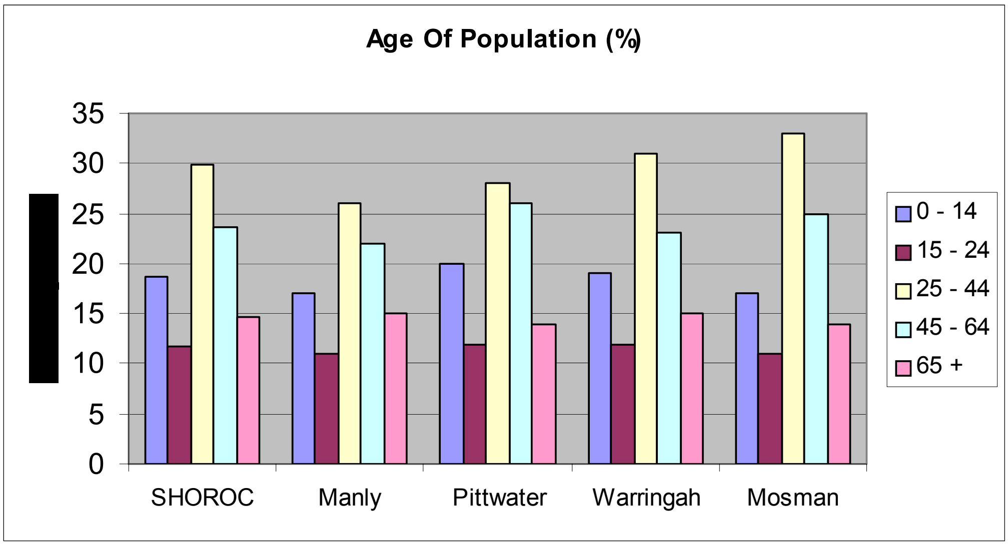
The following table shows these population trends since 1991:

Table 14: Population change in the SHOROC region since 1991



Source: ABS Census 2001

Table 15: Age of Population



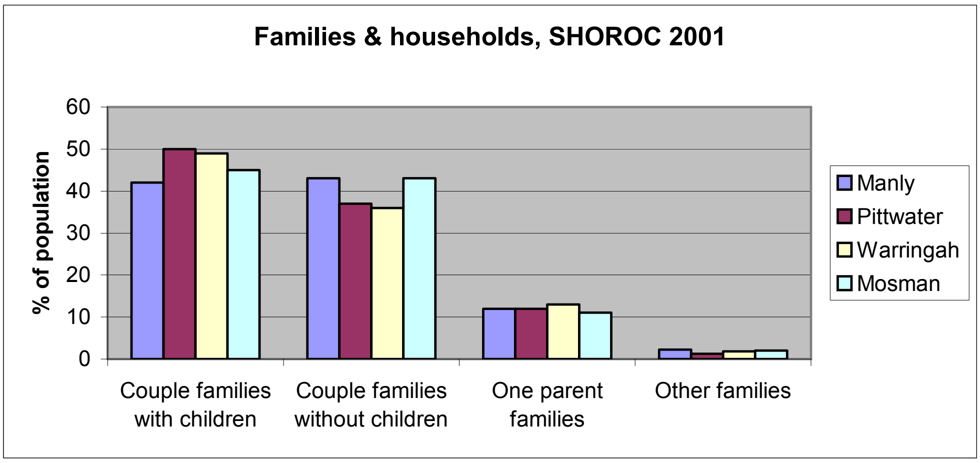
Source: ABS Census 2001

According to the ABS Regional population growth figures the population 65+ accounts for 14% of the SHOROC region compared with 11% for the Sydney region.

3.3 Families and Households

The most significant variation within the region was the difference between couple families with children and without children. Mosman and Manly recorded similar proportions of couple families with and without children while the figures for Pittwater and Warringah revealed a significantly larger proportion of couple families with children than those without. These differences may be a reflection of the relative cost of housing and related socio-economic pressures.

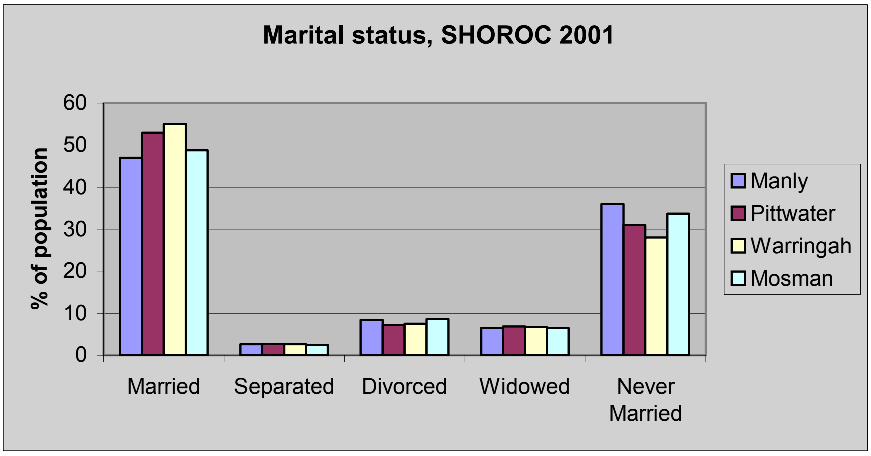
Table 16: Families & Households 2001



Source: ABS Census 2001

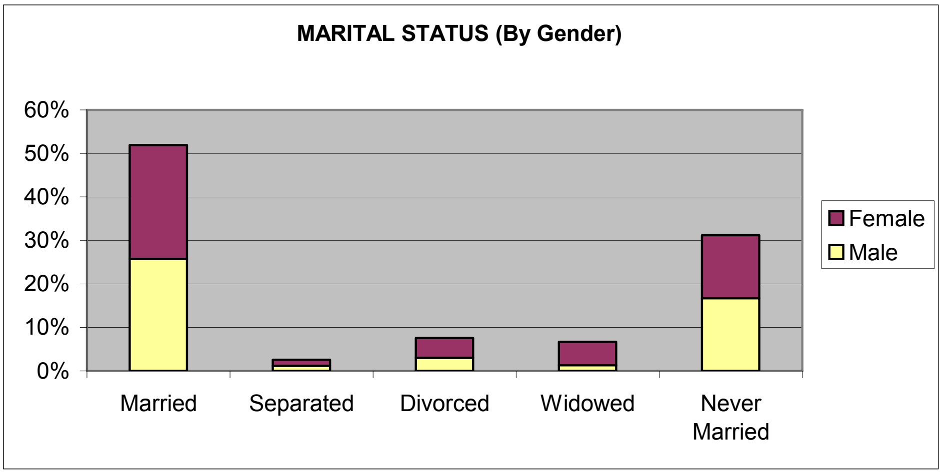
3.4 Marital Status

Table 17: Marital Status in the Region 2001



Source: ABS Census 2001

Table 18: Marital Status by Gender

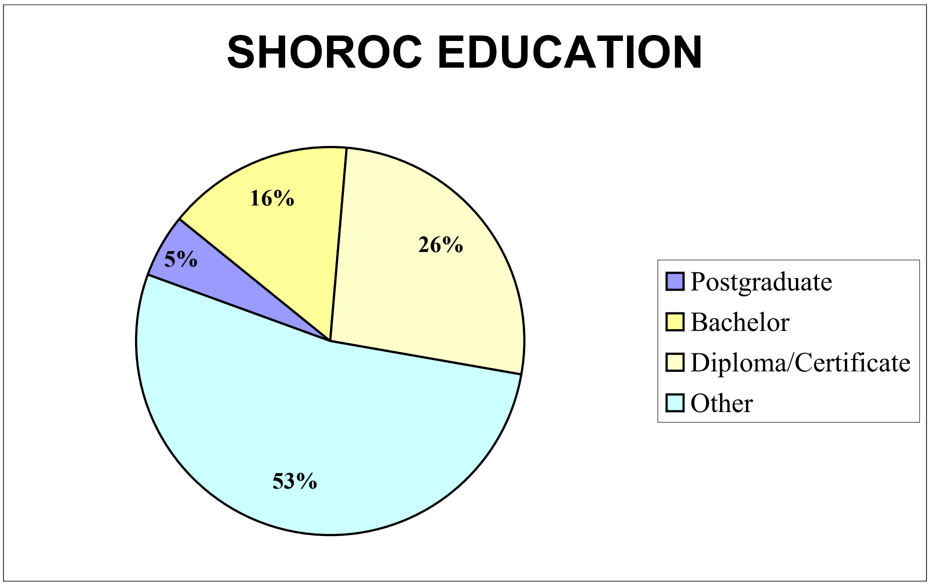


Source: *ABS Census 2001*

Significant in the gender breakdown within each category in Table 18 is the higher representation of females.

3.5 Education

Table 19: Education in SHOROC 2001



Source: ABS Census 2001

The high number of tertiary educated people is significant in that there are few tertiary institutions in the SHOROC region.

This has been identified as a common key issue for consideration.

Table 20: School Student Population within SHOROC Region 2001

Local Government Name	Infants Primary Govt	Infants Primary Catholic	Infants Primary Non Govt	Infants Primary Total
Manly	1678	431	356	2465
Mosman	767	383	670	1820
Warringah	7017	1672	1438	10127
Pittwater	3102	546	871	4519

Source: ABS Census 2001

Local Government Name	Secondary Govt	Secondary Catholic	Secondary Non Govt	Secondary Total
Manly	651	517	431	1599
Mosman	277	310	865	1452
Warringah	4345	1373	2032	7750
Pittwater	1793	834	907	3534

Source: ABS Census 2001

3.6 Origin

Language Spoken at Home

The following table 21 shows language spoken at home for each LGA in 2001.

Table 21: Language spoken at home, Northern Beaches 2001

	Warringah	Manly	Pittwater	Mosman
1.	**English** *103,578* *81%*	**English** *30,088* *82%*	**English** *45,875* *88%*	***English*** *21,784* *85.5%*
2.	**Italian** *3,249* *2.5%*	**Chinese** *528* *1.4%*	***Italian*** *427* *0.82%*	***Chinese*** *441* *1.7%*
3.	**Chinese** *2,993* *2.3%*	**Greek** *341* *0.9%*	***German*** **404** *0.77%*	***Japanese*** *211* *0.8%*
4.	**Serbian** *793* *0.6%*	**Italian** *307* *0.8%*	***Serbian*** *328* *0.63%*	***Italian*** *193* *0.8%*

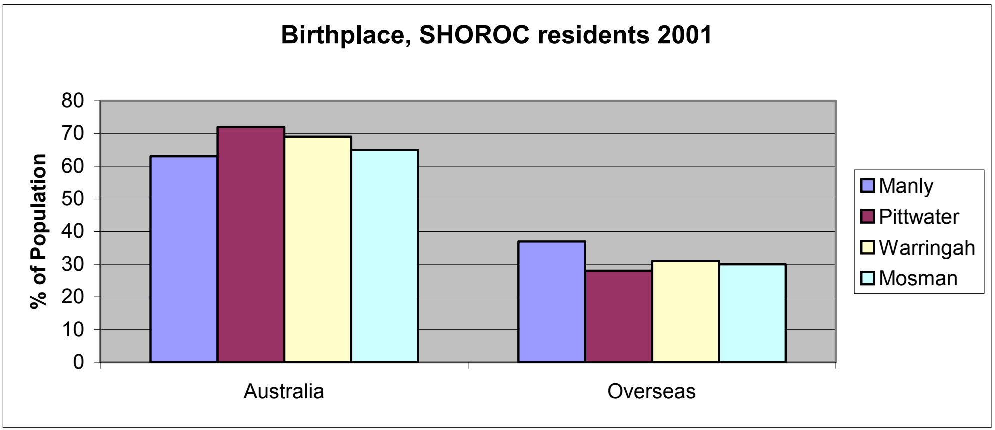
Table 22: Ancestry

Common Ancestries	Manly	Mosman	Pittwater	Warringah
English	40.4%	40.0%	42.4%	38.0%
Australian	31.0%	32.0%	36.9%	34.0%
Irish	14.0%	14.9%	11.8%	12.0%
Indigenous Origin	0.25%	0.1%	0.27%	0.33%

Table 22 indicates that the English, Irish and Australian ancestry makes up the greater proportion of the total ancestry. Pittwater has the higher number from these 3 common ancestries with 91.1% in these three categories.

The region is relatively homogeneous in terms of the ancestry of people counted in the Census.

Table 23: Birthplace of SHOROC Residents 2001



Manly is revealed to have a significantly greater proportion of people who were born overseas in the LGA at Census than the rest of the region.

4 KEY ISSUES

4.1 COMMON KEY ISSUES

In considering the total SHOROC area the working group considered there were common issues which could impact on the regional economy from the data available.

a) **Information** - A lack of economic information at the local and regional level and a reduction in the level of reporting in this area by the Australian Bureau of Statistics (ABS).

b) **Traffic & Transport** - High level traffic and transport issues into and within the region;

Transport to and from the region is also an inhibiting factor on the ability of business to attract this component of the work force.

c) **Employment** - Low unemployment and some difficulty obtaining low and semi skilled staff;

The SHOROC economy needs to create highly skilled jobs if it is to generate employment opportunities more aligned to the employment needs of its residential population. Specifically, emphasis should be on the addition of skilled, upper white collar office-based employment.

Difficulties in obtaining unskilled and semi-skilled staff have come to light from a number of sources during the course of the current research. There also appear to be labour shortages in a range of 'key worker' professions employing semi-skilled or tertiary qualified people, such as nursing and childcare.

d) **Cost of Housing** - Lack of housing, that is, housing that is able to be rented or purchased for a reasonable proportion of income, (Households spending more than 30% of income on housing are defined as being in 'housing stress', and this is at high levels in the SHOROC region.) Housing in the area is no longer affordable to those on low and middle incomes.

   It would appear it has been exacerbated by the cost of housing forcing low income capacity people to live in other areas and that a larger than normal component of the SHOROC region population are more highly educated and have stronger, more developed work skills

e) **Home Based Work** – Lack of knowledge relates to the extent of home based businesses.

   It appears that there is a high level of home based businesses although it has been extremely difficult to obtain any level of quality information to identify a participation rate. It would seem this issue should be the subject of a separate study if it were deemed necessary to gain a better understanding of the dynamics of the emergence of home based businesses with a view to developing strategies which maximise its growth and employment potential.

f) **Education** - Lack of tertiary education facilities.

g) **Businesses/Industries** - A majority of small businesses of 0 – 5 employees in the SHOROC region

   Most recent business registration data from ABS indicates that an estimated 82.3% of businesses were classified as very small businesses (less than 5 employees). This compares to 72.3% of all businesses in the Sydney region being classified as very small.

General Comments

It would appear that the cost of housing is forcing low and middle income capacity people to live in other areas, and that a larger than normal component of the SHOROC region population are more highly educated and have stronger, more developed work skills. However for those not already in the housing market, a high double income is often required to afford the area's housing. Lack of transport to and from the region is also an inhibiting factor on the ability of business to attract this low and middle income component of the work force.

The viability of a local economy depends in many respects on its capacity to maintain a diverse population and labour force. For a local economy to remain competitive, it must be able to source a broad cross-section of labour. There is growing evidence in the SHOROC region that high housing costs are contributing to labour shortages that have the capacity to do long-term damage to the local economy by creating chronic labour shortages in low and middle-income professions, and in 'essential services' such as transport, nursing, retail and child care.

The other critical dimension that the lack of affordable housing in the area raises is that of 'social cohesion'. Vibrant and sustainable communities need young people, older people, children and different kinds of families. There is evidence that high housing costs are eroding existing social and family networks in the region, forcing many with long-term connections to the area out, enabling those with sufficiently high incomes to remain. Alternatively, as local community agencies report, many others who choose to remain struggle for survival as they try to cope with rents or mortgages that are beyond their means, yet they are resistant to leave the area in which all their social, family and employment networks exist.

A long-term question the SHOROC region must face is this – Does the area wish to define itself as an area in which only those on high incomes can live, or can it see value in actively seeking to maintain its long-term social and economic diversity? Housing is the critical factor in this equation – without more affordable housing in the region, and greater labour market diversity and growth, community infrastructure and diversity will continue to erode and the population will continue ageing and becoming less diverse.

4.2 PRINCIPAL DIFFERENCES

Access
The southern end of SHOROC has access to bus and ferry public transport to other parts of Sydney including the CBD. The further north one goes the less public transport is available and destinations are limited to southern SHOROC and city by public bus, Pymble and Chatswood by private bus

Tourism
Again the differences are between south and north with southern SHOROC taking a much more active role in tourism and its benefits than the northern areas. Accommodation in Manly is strongly hotel based while Pittwater encourages B&B accommodation as a less intrusive option.

Attractions eg, Taronga Zoo and Manly itself are actively promoted while north tends to concentrate on ecotourism and a quieter less intrusive style of visitation.

Size
Mosman is the smallest area of 8.7 sq kms and a population of 28,027 while Warringah is the largest area comprising 153 sq kms and a population of 136,662

Industrial bases
Mosman has no industrial bases, Manly has a very small one at Burnt Creek and Pittwater and Warringah have major identified industrial areas at Frenchs Forest, Terrey Hills, Mona Vale and Warriewood Valley.

Influencing Organisations
Mosman is strongly influenced by Taronga Zoo and the restaurant trade and retail/fashion industries, Manly by tourism, Warringah by the automotive industry, the construction industry, (Brookvale) and high technology industries (Terrey Hills) and Pittwater by health, marine, technology and retail industries.

Transport vs. car usage
The further north in SHOROC, the greater the dependence on use of private motor vehicle.

Growth
Mosman and Manly are basically built out and building activity is primarily directed to renovations and rebuilding.

Warringah and Pittwater have new land release activity which will result in population growth and the positive economic flow-ons associated with building, household supplies and trade work.

Distance to CBD
The southern areas have a significant advantage in closeness and transport to the Sydney CBD. Commuter travel times and delivery distances from major outlets eg airports and rail terminals affect business dealings and may discourage certain types of investment and influence the types of industry that establishes itself in the SHOROC region**.**

4.3 LOCAL GOVERNMENT AREA SPECIFIC KEY ISSUES

4.3.1 Manly

Several Issues Impact on the local economy

- 6 million tourists per annum are the primary generator for the local economy from a retail and office perspective. The Manly Tourist has virtually nil vacancy rates and provides a steady demand for labour and support services for the tourism sector.
- The impact on Councils budget from tourism is substantial. A present and continuing issue for Council is how to subsidise and maintain beaches, pools, parks, pedestrian thoroughfares and roads that are subject to tourist numbers and needs well in excess of demands placed on infrastructure by the resident population.
- Lack of low cost and adaptable housing.
- An emerging class of people that are asset rich and cash poor.
- Lack of tertiary education facilities.
- Need to reinforce the regional importance and contribution that the Manly Hotel sector contributes.
- Constraints placed by current regional transport linkages / services and in particular the importance of ferries to the local economy.
- Lack of an integrated planning framework for future development within North Head.
- Impact of major regional shopping centres on the Manly Town Centre has lead to the development of new niche markets.

4.3.2 Mosman

Several issues impact on the local economy:

- Low unemployment and difficulty obtaining low and semi skilled staff;
- Staff recruitment competition from proximity to the City of Sydney and North Sydney CBDs, exacerbated by difficult public transport;
- High level traffic and transport issues;
- Retail competition from proximity to the CBD and other large commercial areas notably Warringah Mall and Chatswood Chase;
- Lack of tertiary education facilities;
- Lack of low cost housing, a particular need for the late teens and 20's and the over 70's;
- Lack of retirement housing and housing for the frail aged and those who need on-site care
- Paucity of local hospital accommodation
- Lack of hotel or motel accommodation;
- Push/pull factors relating to tourism, desire for local economic benefit without negative impact on local residents;
- Potential for more visitor activity and related transport issues with the proposed opening up of Middle Head Georges Heights defence lands;
- Poor knowledge of extent of home based business sector
- Difficulty in assessing the level of hidden unemployment and retrenchment only revealed to some extent by business start up help sought from the BEC
- Difficulty in obtaining up to date economic data from ABS, ATO and other sources.

4.3.3 Pittwater

- **Transport** - Pittwater is not well served by public transport networks. Furthermore, Pittwater is located away from Sydney's major road system which makes it less efficient than many other metropolitan locations for distribution and servicing activities

- **Marine industry -** The further expansion of marine industries should be encouraged particularly because it would produce flow-on benefits to the area and marine activities are a vital means of differentiating Pittwater from other areas in the Sydney Region

- **Ageing Population** - Overall labour force participation rates in Pittwater will tend to fall significantly over the next decade as a substantial proportion of the local population moves into retirement age categories. A more youthful population confers a decided economic advantage on an area due to a greater proportion of local residents being 'technology savvy' compared with areas where the resident population is biased toward older age cohorts and housing costs are not encouraging young people to stay in the area

- **Education & Skilled Workforce** - there is a need for the Pittwater economy to add highly skilled jobs if it is to generate employment opportunities which are more aligned to the employment needs of its residential population. Specifically, emphasis should be on the addition of skilled, upper white collar office-based employment.

- **Construction & Property**- Maintaining population growth and thereby residential development activity in Pittwater will be essential to ensuring that the above average contribution which the residential construction sector has made to the local economy continues.

- **Information** - in many instances relevant data for the Pittwater area in isolation cannot be separately identified from that for Warringah as a whole.

- **Health/community services and Mona Vale hospital** – is a major industry in Pittwater and needs Mona Vale Hospital to continue to thrive

- **Manufacturing** - The only employment sector in Pittwater which is likely to be driven by external demand factors is the manufacturing sector.

- **Employment** - A shift in the occupational structure of Pittwater is underway with residents increasingly likely to be employed in higher status, more highly skilled occupations. Unless the local economy is capable of producing growth in these types of jobs over the next decade the level of employment self-sufficiently in Pittwater could fall further.

- **Education & Skills –** The Pittwater economy needs to create highly skilled jobs if it is to generate employment opportunities more aligned to the employment needs of its residential population. Specifically, emphasis should be on the addition of skilled, upper white collar office-based employment.

  No tertiary institutions in Pittwater and few in SHOROC result in more traffic and transport demand.

- **Technology** - it would be unlikely that the IT sector per se will experience substantial future growth in Pittwater if left to its own devices.

- **Small Business** - Most recent business registration data from ABS indicates that an estimated 97.7% of all enterprises in Pittwater were certified as small businesses (less than 20 employees). 82.3% were classified as very small businesses (less than 5 employees). This compares to 72.3% of all businesses in the Sydney region being classified as very small.
  This has the benefits of concentrating on the needs of small and very small business particularly in relation to home offices and the availability of affordable business accommodation rather than corporate-style business parks.

- **Balance** - the need to ensure a balanced debate about population growth and housing development both of which stimulate demand for local goods and services.

- **Recreation industry -** bed and breakfast, ecotourism - The desirability of coordinating the interactions of business in the tourism sector including bed and breakfast operators, eco-tourism businesses, transport operators and the like.

4.3.4 Warringah

An examination of the labour force information and Warringah business profile has identified several key issues that should be considered when discussing the Warringah economic environment.

- **Low unemployment – currently about 3.7%**
  Employment levels have remained static for many years and unless there are some significant shifts at the national level, it will most likely continue at a high level well into the future. This is reinforced by the job opportunities outstripping the available local labour market particularly at the unskilled and semi-skilled levels, and in many lower-paying professions such as nursing and childcare.

- **Difficulties in obtaining unskilled and semi-skilled staff**
  This has come to light from a number of sources during the course of the current research. It would appear that the cost of housing is forcing low and middle income capacity people to live in other areas, and that a larger than normal component of the Warringah LGA population are more highly educated and have stronger, more developed work skills. However for those not already in the housing market, a high double income is often required to afford the area's housing. Lack of transport to and from the region is also an inhibiting factor on the ability of business to attract this low and middle income component of the work force.

  Research being undertaken by Manly and Warringah councils as part of the Local Government Housing Initiatives Program (examining key housing issues for the area) will be seeking to clarify some of the relationships between labour shortages and the lack of affordable housing in the area.

  The table below has been provided in an attempt to identify where additional employees maybe sourced. The highest unemployment rate and concentration of unemployed persons in regions surrounding Warringah is on the Central Coast. Inner Sydney and the Eastern Suburbs are other possible sources of employees. While further investigation would be required to determine if the people looking for work in these areas have the appropriate skills, transport to potential employment must be considered. An effective transport system will enhance the opportunities to attract people to employment in the Warringah area. However without a substantial increase in the availability of affordable housing throughout the SHOROC region, it is unlikely that improved transport will solve such labour shortages, as people will only travel so far to work in low-paying professions – and particularly so in cases where work is available closer to their homes.

Table 24: Unemployment Rate in Regions Surrounding Northern Beaches Persons aged 15 years and over

Region	Unemployment Rate (%)	Unemployed Persons (000)
Northern Beaches Statistical Region	3.7	4.8
Lower Northern Sydney Statistical Region	1.9	2.9
Hornsby-Ku-ring-gai Statistical Region	2.3	3.1
Baulkham Hills	1.4	1.1
Inner Sydney Statistical Region	3.6	5.7
Inner Western Sydney Statistical Region	3.3	3.1
Eastern Suburbs Statistical Region	3.6	5.0
Gosford-Wyong Statistical Region	7.2	9.2

Source: Australian Bureau of Statistics Labour Force Statistics May Quarter 2000

- **Limited public transport into and within the Warringah Local Government Area**
  This issue was raised via a range of sources. In fact in the Warringah LEP Review in 1997, the existing transport situation to and from the Peninsula was identified as being widely recognised as a constraint to further development. In fact it was noted in Ministerial Direction No 52, which requires any proposals for major increases in residential zonings on the Warringah Peninsular to be accompanied by evidence that additional employment opportunities exist or have been created and / or that the capacity of the transport system has been upgraded to cater for the proposal.

  The following is an extract from the "Warringah LEP Review of 1997":
  "The transport problems on the Warringah Peninsula stem from the fact that public and private transport, in the absence of any form of rail, is largely confined to the road system and in particular, three major corridors – the Warringah Road corridor which crosses the Roseville Bridge, the coastal corridor (Pittwater Road / Condamine Street) which crosses the Spit Bridge, and Mona Vale Road.

  Previous metropolitan strategies, as well as CITIES for the 21st Century and the Integrated Transport Strategy (DoT1995), have described a corridor linking Central Sydney / Lower North Shore and the Warringah Peninsula variously as a "strategic transport opportunity". In 1994, under the guidance of a Section 22 Committee, and extensive investigation was carried out of a range of transport options on the basis of their economic and environmental feasibility.

Perhaps the most important finding of the investigation was that the general financial return for all the transport options considered was insufficient to attract potential investors without significant levels of government subsidy, estimated in 1994 to be in the order of 80 per cent of initial capital costs of between $780 million to $890 million (ERM Mitchell McCotter 1996). Such investment in public transport would almost certainly bring with it expectations of a greatly increased population on the Warringah Peninsula."

It is possible that a case could now be made to justify addressing public transport issues

- **High level of home based businesses**
  It appears that there is a high level of home based businesses although it has been extremely difficult to obtain any level of quality information to identify a participation rate and whether in fact it is any different to other Council areas.

  It would seem this issue should be the subject of a separate study if it were deemed necessary. There has been some early research done on this issue. An example is in the City of Casy in Victoria where an effort was made to gain a better understanding of the dynamics of the emergence of home based businesses with a view to developing strategies which maximise its growth and employment potential.

- **Adjoining Local Government Areas**
  Adjoining LGA's of Pittwater and Manly do not appear to have any major focus on economic matters and therefore devote very limited resources towards economic development. Again, the business and employment environment has been very strong in the Peninsula area as reflected earlier. It is generally a very self-sufficient economy. The Peninsula area embracing Pittwater, Warringah and Manly LGA's can almost be described as a regional area due to its self-sufficiency and geographical nature. There could therefore be some considerable economic related benefits derived from developing a strategic alliance.

  Possible benefits to such an alliance may include:

    - Greater focus on public transport issues
    - Avoiding duplication of activities and services
    - Dealing with employment issues such as the deficiency in the unskilled and semi-skilled labour market
    - Joint tourism strategies.

  From additional research obtained it would seem that the only LGA's who place some emphasis on economic development are usually located in regional Australia where employment and business development are issues.

In western Sydney the State Government set up an independent body - The Greater Western Sydney Development Board, to attract business and investment. Penrith Council also has an economic development department. Councils such as Maitland, Lake Macquarie, Hastings and Port Stephens have also established small economic units. Also in some regional areas they have formed independent groups for example the two Central Coast Councils formed and funded an independent group called The Central Coast Regional Development Corporation. In Tamworth they formed the Tamworth Development Corporation which was a coalition of various groups including Council, Chamber of Commerce, Tourism and State government.

Again these bodies have been primarily established to attract business and investment to their areas. It is also relevant to note that numerous Councils both regional and in the Sydney Metropolitan Area have established Main Street Programs to revitalise ribbon style shopping precincts. These are also seen as an economic development issue.

- **Limited Tourism Activity**
  Currently, there is very little emphasis on tourism in the Warringah LGA. The March 2000 statistics from the Australian Bureau of Statistics indicates only three businesses in the local area are involved with offering accommodation and these businesses employ a total of 96 persons.

  The main type of tourist activity involves day visitors. The attractions that bring visitors into the area include the beaches, foreshore areas, recreational areas, shopping facilities such as Warringah Mall, rugby league games at Brookvale and personal visits to the War Veterans Home and other nursing homes. With the close proximity of the Manly tourist area, it would appear that attracting tourists for overnight or longer stay visitation in the local area would be difficult.

  With the objective of identifying key issues that could impact on the local economy, tourism does not stand out as a major industry. To further assess the current impact of tourism on the Warringah economy it may be useful to review any changes in the area since the adoption of the 1993 Warringah Tourism Plan.

5. Appendix One

BUSINESS PROFILES

5.1 MANLY

Industry Types

- Tourism
- Professional and Retail Business Services
- Industrial/service commercial centres

Tourism:

- Manly is a popular destination for both overnight visitors and for day trippers. Manly has an abundance of natural and built attractions, which service the tourism market. From an economic perspective tourism is the main stay of the Manly Local Government Area and also provides a catalyst for the economic viability of tourism within the SHOROC Council areas.

Tourist Industry Comments

- Manly has typically been referred to as an important, national and international destination for visitors in Sydney.
- Manly is a beachside area consisting of vibrant cafe and restaurant life style.
- Manly has commonly been seen as a day tripper's destination with many local attractions.
- Generally the majority of overnight visitors to the north of the Harbour would stay at Manly.
- These visitors are generally business people's families and couples.
- Manly is identified as one of the six main beachside locations (these also include Avalon, Newport, Narrabeen, Cronulla, Palm Beach).

  Accommodation is a prime indicator of the viability of the tourism industry. A recent study undertaken by Macroplan indicates that room supply in Manly is slightly declining but steady over the last six quarters, with room nights available at 36,000 pa. Peak room demand occurred in December 1998 and March 2000 with extremely high occupancy rates almost to saturation point. Occupancy rates overall are 14.2% higher than Sydney. (July 02) The hotel market in Manly in particular has out performed Sydney on the basis of average takings per room, with average room in Manly at $175 and $89 in Sydney. This reflects both the unique product offered in Manly and the tight supply and demand conditions of the market. In an analysis done in 2002, it was reported that assuming 100 hotel rooms were lost in the Manly region there would be approximately $28m per annum in lost direct expenditure in the local economy from hotels/motel patrons. This would also equate to the loss of 336 lost positions.

- Restaurants, cafes, gourmet food outlets, support the tourism activity.

- Retail outlets, especially fashion, hair and beauty therapy, bookstores and travel agents and surfwear outlets service the tourism sector.

Professional and Retail Business Services.

In addition to the Manly CBD there are four other major retail precincts, they include:

- Balgowlah Shopping Centre
- Seaforth Shopping Centre
- Balgowlah Heights Shopping Centre (New Street)
- Bulky goods retailing strip at Condamine Street, Manly Vale

All these shopping centres are local in nature, servicing the surrounding residential precincts. All these retail precincts are currently demonstrating vacancy factors and a degree of tenant 'churn' unlike Manly CBD which has negligible vacancies.

Industrial and service centres

- Industrial commercial - based on the information available from Dunn and Bradstreet Marketing Pty Ltd (D&B) an analysis has been undertaken on industry located within Manly. Council has only one industrial precinct, a well established area bounded by Burnt Bridge Creek Deviation, Kenneth Road, Quirk Road and Balgowlah Road situated at Manly Vale. Two large scale industrial activities located within the Centre are:

  Blackmores Limited, which produces vitamins and herb supplements, has annual revenue of $83m and an employee base of 250. The only other large industrial activity belongs to the Oroton Group Limited which has annual revenue of $120m and an employee base of 740.

  The balance of the industrial areas are characterised by bulky goods retailing and small industrial units providing low scale industrial activity.

  Apart from the International School of Management which is based within the old St Patrick's Seminary on North Head, the balance of the commercial activities are scattered throughout Manly, Balgowlah and Seaforth commercial areas. According to D&B Manly LGA from a commercial and industrial perspective has a combined revenue base of $350m and 2,500 employees. These figures are not exhaustive and exclude direct tourism related employment.

Land Use

Manly Council has not planned to assess the long term need for variation to the current land use patterns. Manly LGA is discreet and apart from a few minor exceptions has reached full development potential. There is no potential to expand existing industrial or commercial areas. There is very little undeveloped land stock available within the commercial or industrial zoned lands. What activity is present is a recycling of building stock as opportunities arise. (Eg Totem shopping Centre at Balgowlah).

Similar comments apply to residential precincts that are effectively defined by National Parks and other geographical and built barriers. Recycling of older housing stock to a denser pattern is gradually taking place.

5.2 MOSMAN

Industry Types

- Property and Business Services
- Retail Trade
- Finance and Insurance
- Health and Community Services

The Mosman business environment is focussed on the following industry types:

- Property/Real Estate and Business Services is the largest industry type in Mosman representing 40% of total businesses.
- Retail especially home wares, fashion, children's wear and toys, hair, beauty therapy, antiques and bookstores represents 13% of businesses
- Finance and Insurance Services represents 8%
- Health care including medical, pharmaceutical, private health care represents 7.6%; and

- The following industry types represent between 4 and 5 % each:
  - Restaurants, cafes, gourmet food outlets
  - Construction
  - Wholesale trade
  - Cultural & recreational service
  - Personal and other services including, Sport and Fitness, Residential Aged Care
  - Tourism including Taronga Zoo

Employment Numbers

As at September 1998 (latest available information from ABS) there were 1880 known businesses in Mosman.

Over 82% (1556) of these businesses employed fewer than 5 staff
11% (215) employed from 5-9 staff

7% (13 businesses) employed over 50 staff

Table 25: Business located in the Mosman LGA by Number of Employees

Business Type	Number of Employees							Total No. of businesses all Employment Sizes
Industry	N/A	<5	5 to 9	10 to 19	20 to 49	50 to 99	100 or more	
Agriculture, Forestry & Fishing		1	1					2
Mining	√							
Manufacturing		30	9	4				43
Electricity, Gas & Water Supply	√							
Construction		73	9	2	1			85
Wholesale Trade		66	5		1			72
Retail Trade		170	56	10	8	2		246
Accommodation, Cafes & Restaurants		43	27	9	9	2		90
Transport & Storage		36	5	2	1			44
Communication Services		5	1		1		1	8
Finance and Insurance		140	8	3				151
Property and Business Services		705	48	7	8	1		769
Government, Admin & Defence		2		2	3	1	1	9
Education		23	8	6	4	3		44
Health and Community Services		118	17	3	4	2		144
Cultural & Recreational Services		79	5	2	2		1	89
Personal & Other Services		65	16	2	1			84
Total Businesses		1556	215	52	43	11	3	1880

Source: ABS Business Location Counts for postcode 2088. September 1998 (latest available data)
NB: does not take account of self employers or one person businesses. Data comes from Group Employer applications to the Australian Tax Office.

Major Employers

Taronga Zoo

Covering 28 ha Taronga Zoo is both the largest business by ground space in the area and the largest employer in the area employing 512 staff (including a large contingent of casual staff).

Approximately 1.2 million customers visit the Zoo every year. 35 – 40 % of Zoo visitors arrive and depart by ferry. The remainder travel by car through Mosman.

Mosman Council

Mosman Council is the second largest employer in the area. Council employs:

129 Full time staff
57 Part time staff (163 full time equivalents)

92 Casuals working a wide variety of hours
278 Total employees

Bridgepoint

Bridgepoint is the largest shopping centre in Mosman, covering a total floor area of 6677 sqm and housing 36 businesses that employ 350 staff.

Mosman Cache

Mosman Cache is a smaller centre covering a total floor area of 2159 sqm and housing 15 businesses.

Industrial Centres

There are no industrial areas in the Mosman LGA

Defence Establishments

Mosman is home to HMAS Penguin a working naval base where 300 personnel are employed.

Health Services

There are 36 specialists and 60 general practitioners working in the area.

Aged Care Facilities

There are 8 aged care facilities in Mosman catering for approximately 670 individuals.

Clubs

- Mosman has 3 main clubs; Mosman Rowers Club, Middle Harbour Yacht Club and Mosman Returned Services (RS) Club.
- The Mosman RSL Club is the largest with 6000 members and between 45 and 50 staff.
- Mosman Rowers Club has 3600 members and 10 staff. Middle Harbour Yacht Club has 1100 members and 6 full time staff.

EducationThere are 10 schools in the local area of which 4 are public schools and 6 are private schools.

Deleted: ¶

Mosman Day and Evening College has over 10,000 enrolments per year (largely from the Mosman area) and employs 150 casual teachers.

Major Retailing and Professional Centres

The main commercial heart of Mosman is from Spit Junction to Mosman Junction, along Military Road. Others are an area of restaurants and marine services at The Spit, restaurants at cafes at Balmoral Beach and neighbourhood retail areas at Avenue Road, Parriwi Junction, Spofforth Street and part of Cremorne Junction to the west of the LGA.

Spit Junction and Mosman Junction provide a mixture of retail and office based businesses. There are just over 800 commercial premises. Of these approximately 750 are shops and 50 are offices.

The major retail facilities are Bridgepoint Shopping Centre and Mosman Cache Shopping Centre. The remainder of the area features a smaller scale pedestrianfriendly shopping strip with the majority being located within the Military Road Heritage Conservation Area. The street has diverse architectural style consisting of historic building facades, shopfronts and verandahs.

The mix of businesses in the area includes strong representation from cafes, women's fashion, home wares, hairdressers, specialty food and real estate agents.

The fact Mosman provides mostly strip shopping that there are no department or white good stores, spread over a significant area and a perception that Mosman shops are more expensive than shops in other areas makes Mosman retailers prone to competition from the major shopping malls such as Warringah Mall in Brookvale, Greenwood Plaza in North Sydney and also the centres in Chatswood.

Home Based Business and Employment

Figures are not available on home based businesses. National trends suggest that this is a growing area. A report prepared for Warringah Council estimated in the year 2000 that it could be as high as 7% or 8% in that LGA. In most cases Development Applications are not sought compounding the difficulty in quantifying the numbers of home business and related employment activity.

There are a very small number of bed and breakfast establishments operating within Mosman even though Council has identified that these sorts of businesses can provide attractive accommodation opportunities for the visitor in Sydney.

Land Use

Mosman is essentially an inner city area with no unused land areas and very few that are not used to capacity. Council is determined to protect and enhance existing open and bushland spaces. The only land that may present opportunities is the Middle Head and Georges Heights area which is currently Commonwealth Department of Defence land. It is unlikely that any such land would be of significant economic value; rather Council is opposed to commercialisation of the area being of the view that it should provide passive and active recreational opportunities. Expansion of the business sector in Mosman would need to be within the existing envelope of the current commercial areas. This is one reason for Council being interested in a regional approach to economic development with the proviso that traffic generation would need to be closely controlled

Business Vacancy Rates

The general commercial vacancy rate in the Mosman LGA is generally low ranging between 1% and 3%. It should be noted that whilst there is a low vacancy rate there is a significant turnover in smaller retail businesses in the area.

Key Government and Private Sector Agencies

Local Government Business Agencies

There are two local government business services in Mosman. The first is Mosman Business Enterprise Centre (BEC). The BEC is fully funded in Mosman by the Mosman Council and operates out of the Community Information Office. It provides a free advisory service to new and fledgling businesses and is well respected and appreciated by its clients. It has a voluntary Advisory Group comprising the Deputy Mayor and key current or retired members of the business community. Retrenchment remains a factor in the decision of some people to go into small business. These people generally do not register as unemployed and therefore are not reflected in statistics.

The second is the Mosman Business Forum also funded by Mosman Council. Its aims are to:

- Involve Mosman businesses in Council's planning for economic development
- Exchange information concerning matters relevant to businesses in Mosman Municipal Council
- Identify what the Mosman business community is able to do for itself to make for better business
- Identify what Council is able to do to assist the business community
- Identify key issues and determine responsibilities for managing specific issues
- Foster the co-operative relationship between the business community and Council
- Drive the promotional theme for the Mosman business community

Private Sector Agencies

The private sector supports the Mosman Chamber of Commerce that has approximately 100 members of which 30% are retailers and the remainder are professional services. The Mosman Chamber of Commerce works closely with the Council.

In 2000, Council, the Chamber and the Business Forum adopted the Mosman Is logo specifically for marketing the area.

The Police through Harbourside Local Area Command, the Chamber of Commerce and the Council jointly support the Mosman Business Watch which is administered by the Council.

There are three active Clubs comprising representatives of the business community; the Rotary Club of Mosman, the Balmoral Rotary Club and the Mosman Lions Club.

5.3 PITTWATER

Industry types

- Property & Business Services
- Retail
- Construction
- Recreation

Businesses in the Pittwater area are located primarily in the property and business services, retail and construction industries.

Small businesses (0-5 employees) represent the majority of businesses in Pittwater and are concentrated in the above industries.

The greatest employment growth in Pittwater in the 2001 census data occurred in the following industries:

Property & Business Services	up 481
Retail	up 320
Construction	up 284
Education	up 218

The construction industry is highly relevant to the local economy. In 2001, 2700 of all Pittwater Local Government Area jobs were in the construction industry.

The residential construction sector is a very important economic “driver” and it is also important at the local level in terms of its flow-on effects to the building supply, landscaping & bulky goods retail sectors.

Maintaining future population growth & thereby residential development activity in Pittwater is essential to ensuring the continued health of the local residential construction sector & hence its contribution to the local economy.

Major Retailing and Professional Centres

In Pittwater the main retailing and professional centres are:

- Warriewood Square - Major Retail
- Mona Vale Commercial- Major Retail - *Influencing Factor – Woolworths
- Newport - Pittwater Road Shopping Centre
- Avalon Shopping Village

Nearly 25% of all jobs in Pittwater LGA are in the wholesale/retail sector. The majority of these were in retailing as there is only a relatively small component of wholesaling industries operating in the LGA. Future growth in the wholesale/retail sector in Pittwater will be dependant on maintaining population growth in the LGA.

In addition there are a number of Minor Commercial Centres viz:

- Elanora Heights
- Park Road – Warriewood
- Bayview Shopping Centre
- Kalinya Street-Newport
- Bilgola Plateau - Shops
- Whale Beach
- Palm Beach West Commercial
- Palm Beach East - Shops

Significant Industrial and Commercial Centres

Table 26: Number of Business Locations by Industry, by Employment Size

	Employment Size by Employee Numbers			
Industry	**0-4**	**5-19**	**20+**	Total
Agriculture, Forestry, Fishing	22	4	1	27
Mining	4	0	0	4
Manufacturing	161	58	17	236
Electricity, as and water supply	1	2	0	3
Construction	543	64	3	610
Wholesale trade	246	50	9	305
Retail trade	356	155	16	527
Accommodation, cafes and restaurants	58	50	14	122
Transport and storage	101	11	1	113
Communication services	8	1	3	12
Finance and insurance	144	25	4	173
Property and business services	887	57	9	953
Government administration and	3	2	2	7
defence	36	14	5	55
Education	135	42	8	185
Health and community services	168	16	4	188
Cultural and recreational services	146	28	5	179
Personal and other services				
Total	**3019**	**579**	**101**	**3699**

Source: ABS Business Register 1998

Large businesses (20 or more employees) are concentrated in the areas of retail trade, health and community services, and education, as outlined above.

Businesses in the Pittwater area are located primarily in the property and business services, retail and construction industries. Small businesses (0-4 employees) represent the majority of businesses in Pittwater and are concentrated in the areas of property and business services, construction and retail trade.

In terms of estimated output, in 2000 the 'top five' ranked industry sectors in Pittwater were:

Retail	$820.0 million p.a.
Wholesale	$650.0
Finance & Insurance	$340.0
Property & Business Services	$320.0
Construction	$227.0

Retailing in Pittwater is arguably the single most important industry sector. Approximately 14% of all enterprises are in the retail sector; the retail sector accounts for 16% of all jobs & contributes an estimated 24% to the total output of all industries in Pittwater.

Major commercial/industrial centres are:

- North Narrabeen
- Pittwater Road West – Industrial Shops
- Pittwater Road East - Industrial/Shops
- Powderworks Rd / Gardener St Centre
- Pittwater Road East Industrial Centre
- Warriewood
- Vuko Place
- Mona Vale Road, Jubilee Road and Warriewood Road
- Mona Vale
- Darley Street Industrial Centre

Home Based Business and Employment

The 2001 statistics indicated 8% of people in Pittwater of all professions were already working from home in Pittwater and council has supported this trend with its own working from home implementation package and guidelines for Home Based work.

The sector helps to remove demand on transport within the area as well as bringing life back to the local economy.

The number of professionals working in this way is evidenced by the growth in cafes patronage and the noticeable use of these for business meetings. It has begun to rejuvenate local village centres and benefits the local economy with convenient eating venues, goods and services. The printing and publishing industry in Pittwater is an example of a growth industry being patronised by local businesses operating from home premises and without the facilities of a large office complex as are secretarial services and more recently personnel placement services.

Land Use
Pittwater has limited industrial commercial land available, but the main areas to have been zoned to accommodate industrial and commercial development are:

- Currently, Pittwater LGA has land zoned for Light Industrial purposes (Mona Vale, Warriewood, North Narrabeen), and land zoned for Commercial/Business purposes (main business areas in Warriewood, Avalon, Newport, Mona Vale, and neighbourhood business areas in all suburbs). Additional opportunities for industrial/commercial development are proposed as detailed below.

- Land is earmarked for industrial/commercial development within the Warriewood Valley Land Release (sectors 6 and 7).

- 8.9 hectares of land is proposed for industrial/commercial development within the Warriewood Sewage Treatment Plant (STP) Buffer Area. This forms part of the new draft strategy for this area.

Mona Vale
The migration of companies like Maersk Medical Australia employing 175 staff in Mona Vale and Woolworths Mona Vale which is the highest selling of the Woolworths outlets in Australia, employs some 400 staff. Other influencing factors such as the migration of the marine small businesses to the area as the foreshores costs of operation become excessive and expanding medical services have created a thriving industrial/commercial hub.

Warriewood Valley Land Release
This release has been for both residential and industrial/commercial development and a significant increase in commercial premises is currently occurring. Major fast food outlets have located there, as has office accommodation, storage and light industry.

Business Vacancy Rates
As in Warringah Local Government Area, the Pittwater area is limited in its business expansion by the lack of the traditional features which attract industry. These include:

- Good road access and egress
- Ready access to airports
- Ready access to shipping
- Ready access to rail transport
- Good public transport
- Availability of an unskilled and semi skilled workforce
- Major tracts of cheap industrial land

However the local economy is still strong and self sufficient and complements developments with residential and retail growth.

Many industries are small by nature, employing 1-5 staff and owned/operated by locally based business people.

Survey of Local Business
The 2000 Pittwater Economic Report was presented to the Pittwater Business Community at a Business Forum in 2001 and was universally accepted as a snapshot of the area and the business growth and employment in the area. The identification of issues and of potential growth areas was also greeted with enthusiasm and interest. Copies of the report were issued to all participants and all attendees were positive and welcomed the data.

Key Government and Private Sector Agencies
There is no formal network of government and private sector agencies in Pittwater with the Chambers of Commerce for Narrabeen Lakes, Avalon and Palm Beach active but no Mona Vale Chamber at present. The Mona Vale Hospital, Ambulance, Police and Fire Services have a presence in the area. There are two major commercial Training complexes operated at Mona Vale and Ingleside respectively by GIO and Westpac but there is little liaison between these various organisations and council on any structured basis.
The main issues for all of Pittwater revolve around transport, the environment and the future growth of industry and commerce.

WARRINGAH

The Warringah business environment is focussed on the following industry types:

- Retailing
- Computers
- Engineering
- Professional
- Pharmaceutical

The table below reveals that as at September 1998 there were approximately 8000 known businesses in Warringah. Over 7000 of these businesses employed up to 10 staff and 55 businesses employed over 100 staff.

As reflected in other sections of this report, there are some very large key manufacturing, distribution and wholesaling groups who employ large numbers of staff. Health Care, Retailing and the Property and Businesses Service sectors are also key employer groups.

Table 27: Businesses Located in Warringah LGA by Number of Employees

	Number of Employees							Total All Employment Sizes
Industry	N/A	<5	5 to 9	10 to 19	20 to 49	50 to 99	100 or more	
Agriculture, Forestry & Fishing	18	22	3	1	0	0	0	44
Mining	0	3	0	0	1	0	0	4
Manufacturing	0	339	130	86	47	23	10	635
Electricity, Gas & Water Supply	0	1	0	1	2	0	1	5
Construction	0	1080	93	22	10	1	1	1207
Wholesale Trade	0	507	157	80	35	13	5	797
Retail Trade	0	695	269	87	33	9	12	1105
Accom., Cafes & Restaurants	0	84	41	14	15	4	3	161
Transport and Storage	0	198	25	8	4	1	1	237
Communication Services	0	42	6	4	4	3	0	59
Finance and Insurance	0	280	41	15	9	1	0	346
Property and Business Services	0	1869	188	40	23	11	7	2138
Govern. Admin. & Defence	0	3	2	1	0	1	2	9
Education	0	75	16	35	19	7	3	155
Health and Community Services	0	298	70	24	19	12	9	432
Cultural & Recreational Services	0	195	26	10	8	5	1	245
Personal & Other Services	0	280	42	11	12	2	0	347
Total Businesses	18	5971	1109	439	241	93	55	7926

Source: Australian Bureau of Statistics Business Register September 1998 (unpublished data)

The table below contains a profile of the manufacturing industry and its employee base. This industry remains a key sector for the area despite a decline nationally.

The newer type of manufacturing activity generally relates to computers, printing and publishing companies such as Dell, Getronics (Wang), Pearsons and the long established groups such as Roche and Pirelli Cables.

Table 28: Manufacturing Industry in Warringah LGA

Manufacturing Locations Summary of Operations 1996-97				
	Locations at 30 June (Number)	Employment at end of June (Number) (a)	Wages and salaries ($'000) (b)	Turnover ($'000)
Food, Beverage and Tobacco Manufacturing	20	180	6237	82387
Textile, Clothing, Footwear and Leather Manufacturing	40	298	7221	23158
Wood and Paper Product Manufacturing	39	157	4502	22272
Printing, Publishing and Recorded Media	117	1144	41614	181002
Petroleum, Coal, Chemical and Associated Product Manufacturing	63	1336	62817	217790
Non-Metallic Mineral Product Manufacturing	21	123	3972	25300
Metal Product Manufacturing	94	846	26901	160343
Machinery and Equipment Manufacturing	136	2008	69519	293023
Other Manufacturing	88	618	17869	72590
Total Manufacturing	618	6710	240652	1077867

(a) includes working proprietors.
(b) Excludes the drawings of working proprietors.
Source: Australian Bureau of Statistics Manufacturing Survey 1996-97 Financial Year (unpublished data)

Major Retailing and Professional Centres

The major retailing and professional centres which contribute significantly to the local economy in Warringah include:

- Brookvale Shopping Centre
- Collaroy Shopping Centre
- Dee Why Shopping Centre
- Glenrose Shopping Centre
- Forest Way Shopping Centre
- Forestville Shopping Centre
- Harbord Shopping Centre
- Narrabeen Shopping Centre
- Warringah Mall.

There are also a number of other smaller retail centres strategically located throughout the Council area.

By far the major retail employer is Warringah Mall, which is a large regional centre and draws substantial business from outside the Warringah LGA. It has had a significant impact on the traditional ribbon or strip shopping centres including Dee Why and Brookvale.

Nevertheless, the Dee Why shopping district seems to be holding up reasonably well. There is no evidence to suggest that there is an abnormally high vacancy rate and in fact it is surprisingly low. It is suspected that there has been a shift in the tenancy mix over recent years. In addition, there are a small number of key developments occurring in the main street with a mix of retail and shop-top residential housing. This mix will produce a very positive approach towards business growth. The beachfront area at Dee Why is also undergoing a transformation. This is another positive economic development for the area and will draw people from outside the LGA.

In line with the belief that the Peninsula area is strongly self sufficient, a survey of residents conducted in November 1999 by the HVRF on behalf of Warringah Council indicated that Warringah residents tended to use local shopping centres for most purchases and services. The exception to this was in purchasing furniture and whitegoods. Key findings from this research included:

- More than four in five residents shop for groceries, clothing and personal items at locations within Warringah. The most popular locations include Warringah Mall, Dee Why, Forest Way and the Glenrose Centre.

- Less than half of the respondents used local shopping locations for purchasing larger items such as furniture and whitegoods. While Warringah Mall was nominated by a majority of respondents, other areas such as Balgowlah, Manly and Chatswood also rated highly. Almost 20% of respondents also indicated that they would shop around and use the Yellow Pages or Internet to assist them in shopping for these items.

- Almost three-quarters of respondents indicated that they would access personal services such as hairdressers, banks and photo processing within Warringah. While Dee Why and Warringah Mall were most often mentioned as preferred locations, many other areas both in and outside of Warringah were identified including the Manly, Manly Vale and North Manly area.

- Accessing professional services such as doctors, solicitors and accountants also occurred in a wider area similar to that identified for accessing professional services.

Significant Industrial and Commercial Centres

The significant major industrial and commercial centres which accommodate the large computer, engineering and pharmaceutical industries are located at:

- Dee Why West
- French's Forest
- Brookvale Industrial area
- Forestville
- Austlink (Forest Way north precinct)
- Manly Vale.

Home Based Business and Employment

Home based employment appears to be a significant component of local employment. This is consistent with national trends with this type of employment in a strong growth phase. At the 1991 Australian Census it was estimated that about 5% of the Australian work force worked from home. All indications have reinforced continued growth in Warringah, which potentially could now be as high as 7% or 8%.

It is very difficult to gauge the absolute incidence of home based businesses. Nevertheless, following discussion with key business groups and the major commercial real estate agents, it is evident that a substantial component of business activity is home based. Needless to say there is also a movement back towards commercial and industrial premises as home based businesses expand beyond the capacity and other impediments of their home. In some cases this may include the realisation that there are long term competitive advantages of being in a commercial precinct.

There has been some early research into home based businesses in Australia, and it is generally recognised that it is a slow and therefore time consuming exercise to determine the levels and success of home operated businesses. In most cases Development Applications are not sought and hence the difficulties in quantifying the level of business and employment activity.

The City of Casey and the City of Manningham in Victoria undertook some research into the impact of home based businesses. These Councils subsequently put in place policies to assist and monitor home based businesses. Perhaps the growth of home based businesses is an opportunity for Warringah Council to further examine the range of uses it permits in residential areas.

Land Use

Warringah Council has not specifically set about to assess the long-term needs for industrial and commercial land and accordingly do not have a specific policy that identifies a level of land supply to accommodate future needs. During the last ten years the two major areas which have been zoned to accommodate industrial and commercial development are:

- Austlink (near Mona Vale Road and Forest Way)
- Warringah Road in Frenchs Forest.

There has also been some extension of land release in the Dee Why West / Cromer area. It would seem that there has not been an unusually high level of demand for large tracts of suitable land. Nevertheless, the Austlink area still has some significant land parcels available without consents in place. It is understood there are some environmental considerations which could have the potential to restrict some development opportunities.

Nonetheless, the release of the Austlink land development some ten years ago has substantially contributed to employment generation in Warringah LGA. In fact, it boasts some substantial organisations such as Panasonic (200 employees), Getronics (Wang) (300+ employees) and Hardwarehouse (100 employees). In addition, Gerry Harvey through his Domayne outlet is seeking an appropriate site in the Austlink industrial area. It has become a dress circle for some "like industries" in technology and office accommodation as it features key advantages such as a strategic location, its accessibility for employees and customer base. This is not withstanding that public transport is not a feature of the location.

Council could develop mechanisms to respond to the changing market place with their land use policies. In fact, it may be appropriate to focus on recognised growth industries which are very applicable to the Warringah area, such as:

- Tourism
- Recreation and leisure
- Professional and associate professional services.

Whilst the Austlink and Frenchs Forest commercial areas have the ability to cater for large businesses, small to medium sized enterprises (up to 100 employees) continue to be the growth segment of the Australian economy. It would therefore seem wise to consider existing key industrial, commercial and retail centres when allowing future business development. Obviously, infrastructure such as transport, parking and traffic are very important considerations when expanding existing centres.

Business Vacancy Rates

The general commercial and industrial vacancy rate in the Warringah LGA currently fluctuates between 3% and 5% and this has remained static for the last five years. This is considered to indicate a strong demand with any vacancies generally occurring because of:

- Unsuitable premises e.g. accessibility
- Unrealistic prices.

Whilst the demand for local business premises position remains strong, it would seem that it is not immune to the general fluctuation in economic conditions. However, these general fluctuations tend to have a limited impact.

Demand for local non-retail business premises generally comes from:

- Home based business upgrading
- Lifestyle considerations
- Relocation within the LGA primarily caused by growth, access and unsuitable premises considerations
- Expansion of existing business.

From the current research it would seem that there is very limited interest from outside the Peninsula area to take up business sites in Warringah unless it is for strategic or lifestyle considerations. Notwithstanding the above, there continues to be ongoing redevelopment of industrial and commercial sites which are generally taken up in a relatively short period of time.

The most significant commercial and industrial business area is located at Brookvale. It is considered to be particularly strong with a low vacancy rate. The automotive industry and accompanying support industries seem to dominate. Again, it appears to reflect a very self-supporting economy. It is complemented by a very strong adjoining retail centre with Warringah Mall itself employing 5000 people.

It should be noted that there appeared to be some changing trends, which are generally nationwide such as the need for bulky goods accommodation and professional office space. These trends have the potential to impact on major commercial centres such as in the Dee Why, Brookvale and Warringah precincts.

It is very significant to note that the Warringah area does not have some of the traditional features that generally attract industry such as:
Ready access to airports

- Ready access to shipping
- Ready access to a rail network
- Good public transport
- Availability of a unskilled and semi skilled work force
- Major tracts of cheap industrial land.

However, despite the lack of traditional key supports businesses and industry does still choose to locate in the area. This reinforces the very strong and very self-sufficient local economy.

Survey of local business

To provide Warringah Council with a general overview of business opinion a survey of local businesses was conducted in March 2000 by the HVRF. In total, twenty-five businesses completed and returned their questionnaires. While these responses do provide an indication of the sentiment of local businesses, caution should be maintained in interpreting the results due to the small number of responses. The low response to the survey identified a need for Council to seek additional ways in which to communicate or consult with local businesses in the future.

Key findings from the research included:

- Respondents identified the local environment and lifestyle in the area as the main advantage to locating their business in Warringah. The access to customers and clients was also an advantage to being located in Warringah.

- The main disadvantage to having a business located in Warringah related to transportation and the distance to customers or suppliers. Particular emphasis was placed on access to the southern and southwestern areas of Sydney and delays during peak hour traffic into the City. Several respondents also saw the cost of locating in the area, including higher overheads such as rents and wages, as a disadvantage.

- 44% of responding organisations indicated that they had plans for expansion over the next two years. Of those organisations, most would be remaining in the area by either using their present site or moving to a new site within Warringah.

- Limited information was obtained in relation to ways in which Warringah Council could further assist local businesses. Most responses were unique; however two themes that did recur were the need for improved infrastructure and the provision of parking. Parking and access were particularly identified when considering how Council could assist smaller shopping or strip shopping areas.

- The results from the survey also suggested that the Internet may be one way that Council communicates further with local businesses. In addition, the interest shown by respondents in attending seminars sponsored by Council may be another forum used in consulting with the business community.

Key Government and Private Sector Agencies

There are limited formally structured business and / or government agency networks in the Warringah area. The two key organisations identified are the Warringah Chamber of Commerce and the Northern Beaches Business Enterprise Centre. A summary of interviews conducted with the principals of these two organisations identified the following key points.

The key issues that have dominated business concerns over recent years have been:

- Ongoing difficulties with attracting unskilled and semiskilled labour
- Public transport into and within the Warringah Council area
- Parking.

APPENDIX 2
Sources of Data within Report

- Australian Bureau of Statistics Census Data 1996 and 2001
- Regional Population Growth
- Population & Housing
- Labour Force statistics May Quarter 2000
- Business Location Sites by Postcode
- ABS Business Register 1998
- Manufacturing Survey 1996-97 Financial Year
- BTRE Analysis of Department of Transport, Transport Data Centre, 2000 Household Travel Survey
- NSW Department of Education
- NSW Department of Transport – Journey to Work Data 1996
- Mosman Council Economic Review - April 2003-06-30
- Warringah Council Economic Initiatives Study – July 2000
- Manly SHOROC Economic Initiatives Study 2003-06-30
- Pittwater Economic Report 2000
- Dunn & Bradstreet
- The Role of Local Government in Economic Development Vol 2 No.3 2003
- A SHOROC Snapshot from 2001 Census