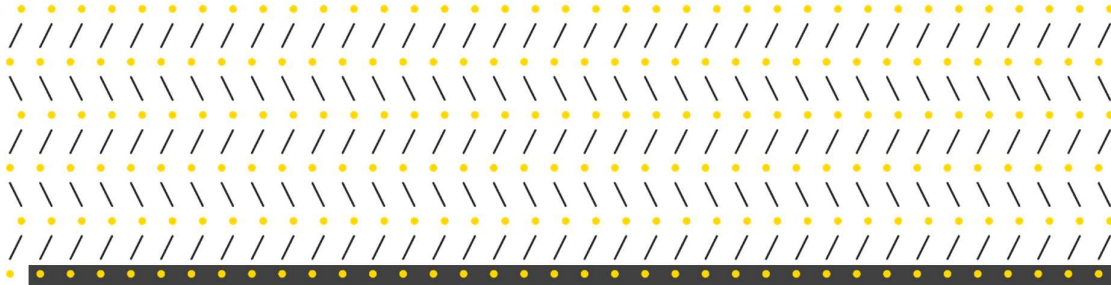


270 Pacific Highway Social and Community Needs Assessment



For Silvernight (Crows Nest) Landowner Pty Ltd

28 May 2025

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1. Introduction

1.1 Report purpose

This report provides a social and community infrastructure needs assessment in relation to the proposed state significant development at 270 Pacific Highway, Crows Nest for a new 16-storey mixed-use development comprising 168 build to rent units and non-residential uses in the podium (SSD-79658964) and concurrent planning proposal to amend the minimum non-residential Floor Space Ratio (FSR) to enable the proposed development.

This report determines the community infrastructure needs generated by the proposed development and assesses how these needs are met, including an evaluation of additional infrastructure needs.

This report responds to the requirements of the Social and Community Needs Assessment in the NSW Department of Planning, Housing and Infrastructure's *Guidance for Concurrent Rezoning Report: SSD Housing (14 April 2025)* (refer to Table 1). This report considers the following facilities, spaces and infrastructure types:

- Libraries
- Community centres
- Primary and secondary schools
- Childcare facilities
- Open and recreation spaces
- Recreation and sporting facilities
- Health facilities
- Cultural facilities.

Table 1 Guidance for rezoning report requirements

Technical information	Relevant report section
<p>3. Infrastructure</p> <p>A Social and Community Needs Assessment report may be required to assess any additional demand social and community facilities and services. It should address the following (as relevant):</p>	
<ul style="list-style-type: none"> • Analysis of demographic context and trends, existing and planning social and community infrastructure including, schools, tertiary education and childcare facilities, community facilities, open space, and recreation 	Section 4. Community profile
<ul style="list-style-type: none"> • Assessment of benchmarks or provisioning rates for social and community infrastructure, including likely needs, quantum of open space and dual use of open space 	Section 5. Infrastructure needs assessment
<ul style="list-style-type: none"> • Proposed population projections/development scenarios including details of housing mix/diversity to determine expected level of service for the future population 	Section 4.3 Site development scenarios
<ul style="list-style-type: none"> • Recommendations on the additional infrastructure needed to satisfy the expected level of service and high-level scoping of costs and land requirements, delivery method and funding. 	Section 6. Recommendations and conclusion



1.2 Planning proposal overview

The **planning proposal** seeks an amendment to the minimum non-residential FSR under clause 4.4A(2) of North Sydney Local Environmental Plan 2013 (NSLEP 2013). This amendment is being considered as a State assessed rezoning proposal concurrently with the State significant development (SSD) application (SSD-79658964) as it would be required to facilitate the proposed development as build to rent shop top housing.

The **proposed development** (SSD-79658964) is for development of a 16-storey mixed-use building. The development will provide a mix of Build-to-Rent residential and commercial floor space and an active street frontage along the Pacific Highway.

In summary, approval for the following is sought:

- demolition of two existing 5 storey commercial buildings
- construction of a maximum 16 storey building, including:
 - 2 basement parking levels (with 82 carparks, 8 motorbike spaces and 226 bicycle spaces)
 - 3 podium levels comprising non-residential uses such as medical centre, retail, and residential uses (build to rent units and residential amenity facilities such as a gym and sauna, steam room, outdoor pool, class space, cinema room, co-working space)
 - 13 storeys of residential uses in the tower, comprising build-to-rent units
 - communal open space
 - landscaping on ground, level 2 – level 15
 - rooftop solar panels
 - internal and external residential amenities space on roof top
 - streetscape upgrades
 - office and substation along the northwestern boundary

1.3 Site details and location

The site is located within the North Sydney Local Government Area (LGA) at 270 Pacific Highway, Crows Nest.

It is legally described as Lot 22 in DP706776 and is 3,796m². and currently contains a 5-storey commercial building.

The NSLEP 2013 applies MU1 Mixed Use zoning to the entire site. The adjacent sites to the south west along Sinclair Street are zoned R4 High Density Residential. The site is located approximately 250 metres from the Crows Nest Metro Station and is highly accessible by bus and metro services.

As shown in Figure 1 below, the site is fronted by the Pacific Highway, receiving vehicle access from Bruce Street in the south. Key points of interest around the site include the Mater Hospital 250m south, Cammeraygal High School, 315m south and North Sydney Girls High School 190m south east.





Figure 1 Site context map

1.4 Report structure

This report has six sections:

Section 1: Introduction provides an overview of the proposal and site context and location.

Section 2: Methodology documents the methodology and assumptions applied to conducting the needs assessment.

Section 3: Context setting describes the locality of the site, provides an overview of the policy and strategic setting that influences the community and social needs assessment and approach to proposed development, and describes current and emerging trends that influences social and community needs.

Section 4: Community profile describes the demographic profile of the current and projected community and an understanding of the residents and workers that the proposed development would accommodate.

Section 5: Infrastructure needs assessment provides a description and assessment of infrastructure needs based on infrastructure benchmarks and the proposed development.

Section 6: Findings and conclusion summarises the findings of this assessment and conclusion.



2. Methodology

This report has been prepared in accordance with the Guidance for Concurrent Rezoning Report: SSD Housing document issued for the project on 14 April 2025.

2.1 Needs assessment catchments

Astrolabe identified local and district catchments to assess community infrastructure needs at different scales. These catchments are most appropriate to assess needs due to the location and public transport accessibility of Crows Nest in relation to metropolitan Sydney.

Local catchment

The local catchment for assessing community needs is defined as the area within an approximate 1 kilometre from the subject site. The catchment geography has been defined using Transport for NSW 2021 Travel Zones (TZ21), which are outlined in Appendix A. This is shown in Figure 2 below.

The rationale for this catchment is as follows:

- Approximately aligns with a 15 minute walking catchment
- Aligns with industry standards for local area assessment
- Aligns with methodologies for other studies undertaken relating to social and community needs
- Reflects physical environmental barriers and land uses.



Figure 2 Local catchment and 15 minute walking distance from subject site



Figure 3 shows the catchment created using Statistical Area 1 (SA1) geographies for the purpose of accessing Census data for analysis. As shown below, the SA1 catchment varies slightly from the TZ21 catchment extent. The SA1s used are outlined in Appendix A.

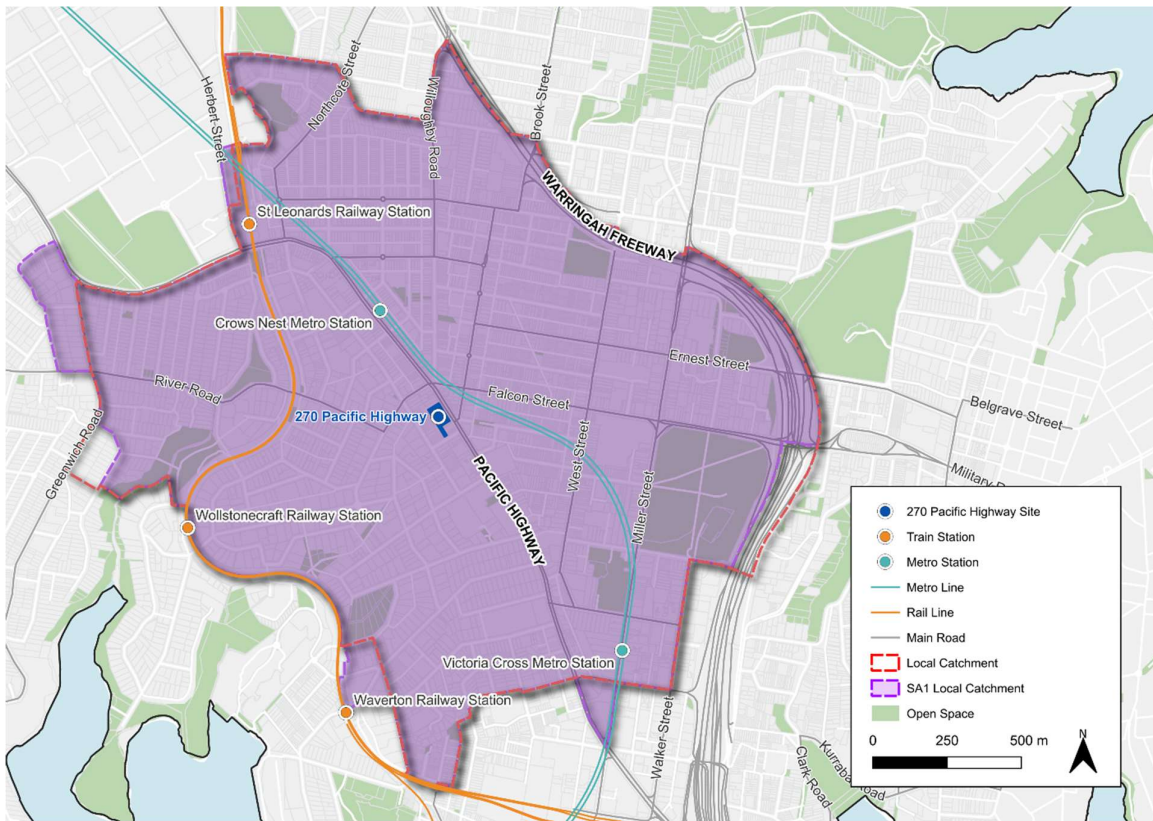


Figure 3 Local catchment Statistical Area 1 boundaries

District catchment

The district catchment for assessing community needs is defined as the three surrounding Local Government Areas: North Sydney, Lane Cove and Willoughby. This is shown in Figure 4.

The rationale for this catchment is as follows:

- Reflects physical environmental barriers (e.g. Sydney Harbour, national parks, major transport infrastructure)
- Approximately aligns with the concept of being able to access district-level infrastructure within a 30 minute walk or a 5 kilometre catchment (see open space benchmarks), as has been observed in similar studies in Greater Sydney (Hawkesbury Social Infrastructure Assessment 2024)
- Important to note that major district and regional community infrastructure can be accessed outside of this catchment easily, such as those in the Sydney CBD, via the new Sydney Metro line at Crows Nest Metro Station.



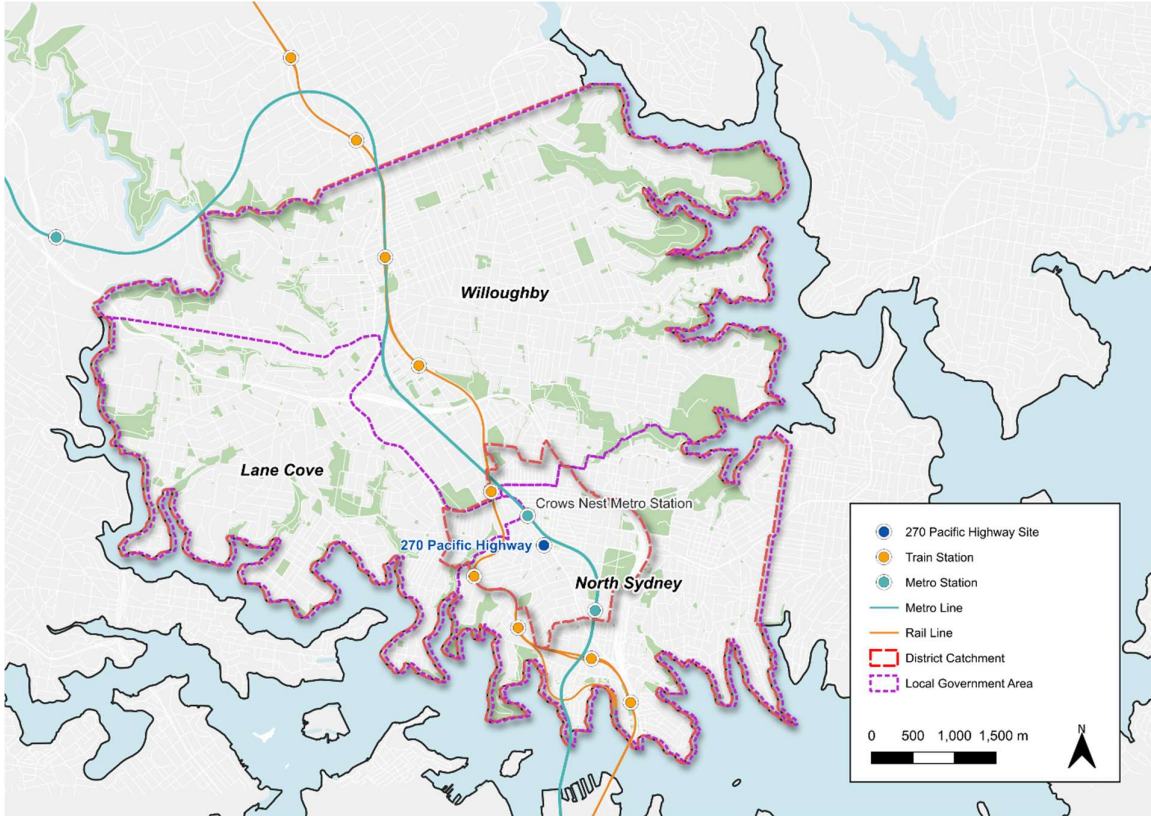


Figure 4 District catchment and relevant local government areas



3. Context setting

3.1 Crows Nest locality

The site is in the North Sydney Local Government Area. It is within 500 metres of the Lane Cove LGA and 1 kilometre from the Willoughby LGA.

Crows Nest is vibrant centre with an established retail and dining strip focussed along Willoughby Road. It has been an area experience rapid change and growth, particularly spurred on with the recent opening of the Crows Nest Metro station in August 2024. This major infrastructure investment established Crows Nest as a prime transit-oriented location. Precinct planning led by the NSW Government sought to leverage the opportunities of this investment. NSW Department of Planning and Environment's 2020 *St Leonards and Crows Nest 2036 Plan* set a long-term vision for growth, including initial rezoning for 3,200 homes.

The development trajectory accelerated dramatically when the NSW Government designated Crows Nest as a Transport Oriented Development (TOD) Accelerated Precinct in December 2023. The NSW Government finalised rezoning for the Crows Nest TOD in November 2024, which increased allowable building heights and densities to enable an additional estimated 5,900 new homes and 2,500 jobs. This rezoning is supported by a State Significant Development assessment pathway for larger residential projects.

To support this substantial growth, the NSW Government has committed a \$520 million investment package for community infrastructure across TOD Accelerated Precincts in 2024. North Sydney Council developed a new Open Space and Recreation Strategy, including plans to redevelop the Holtermann Street carpark site. These strategic planning decisions and infrastructure investments have established Crows Nest as an increasingly attractive location for both residents and businesses, offering excellent transport connectivity, enhanced community facilities, and a vibrant mixed-use environment that builds upon the area's established village character.

3.2 Social and community need trends

The following trends are shaping social and community needs for open space, recreation facilities and community infrastructure. These trends need to be considered in the design and provision of spaces and facilities to meet community needs. These trends are synthesised from the *NSW Intergenerational Report: Towards 2061 – planning for the future*¹, which sets out the key trends and influences for population and the economy for the next 40 years to inform development of policies in NSW.

An aging population

By 2061, one quarter of people living in New South Wales will be aged 65 or over, up from 17 percent today, with the median age rising from 38 to 44 years. This aging trend has implications for the types of community facilities, health services, and housing options needed in communities, as well as the ability for governments to fund infrastructure and services with a decline in the working age population.

¹ NSW Treasury (2021), 2021-22 NSW Intergenerational Report: Towards 2061 – planning for the future, https://www.treasury.nsw.gov.au/sites/default/files/2021-06/2021-22_nsw_intergenerational_report.pdf



Population growth and diversity

By 2061, New South Wales will be home to an additional 3.3 million people, increasing the population to 11.5 million, representing 40 percent more people than today. Natural increase – births minus deaths – will account for 1.3 million additional people (40%), while 2 million (60%) are projected to arrive through net migration. As communities become more culturally diverse, the demand for diversity in cultural and recreation space increases. Flexibility and the ability to share space becomes more important.

A need for more homes and higher density living

New South Wales will need to build another 1.7 million homes by 2060-61, requiring an average of 42,000 homes every year for the next four decades. This growth will not be evenly distributed, with regional areas expected to grow more slowly and age faster on average compared to metropolitan locations. Metropolitan areas and established centres will experience development to accommodate higher density living and service population growth. Smaller private space in apartments presents increasing need for high quality, accessible shared public spaces, as private open space in dwellings becomes more limited.

Changing household composition with smaller households

By 2060-61, the average number of people per household is projected to fall to 2.3, down from 2.5 today. There are projected to be more people living by themselves and fewer families with children, driven by the aging of the population, declining fertility rates and increasing household incomes. This shift in household composition will influence the type and size of housing required as well as associated community infrastructure that supports and facilitates social interactions across the community.

Employment and industry changes towards population services

Most new jobs will emerge in services industries, with business services and social services projected to account for 52 percent of total employment in New South Wales by 2034-35, an increase from 36 percent in 1989-90. Employment growth in services such as Health Care and Social Assistance is projected to be strong as the population ages and as medical treatments and technologies continue to evolve. These shifts will influence where and what type of community and employment infrastructure is needed.

Increasing chronic health conditions

Almost half of Australians are estimated to have one or more of the 10 most common chronic conditions, with this percentage increasing to 80 percent for Australians aged 65 and over. In 2018-19, 84,281 hospitalizations in New South Wales could potentially have been avoided if appropriate and timely preventative care and early management of chronic conditions had been provided. This underscores the need for health infrastructure that supports prevention and early intervention.

There is a trend towards increasing participation in non-sport physical activities with a focus on improving general health and well-being habits. Participation in casual activities like walking, cycling and fitness/gym have seen the largest growth.



3.3 Policy and strategic setting

Strategic framework

Social and community infrastructure needs in Crows Nest is guided by the following suite of strategies and land use plans, policies and guidance and delivery frameworks prepared by the NSW Government and North Sydney Council (see Figure 5).

Strategies and land use plans	Policies and guidance	Delivery frameworks
<ul style="list-style-type: none"> • St Leonards and Crows Nest 2036 Plan (NSW Department of Planning and Environment, 2020) • Draft North Sydney Council Open Space and Recreation Strategy (North Sydney Council, 2024) • North Sydney Community Strategic Plan 2025-2035 (North Sydney Council, 2025) • North Sydney Local Strategic Planning Statement (North Sydney Council, 2020) • North District Plan (Greater Sydney Commission, 2018) 	<ul style="list-style-type: none"> • TOD Accelerated Precincts program • Draft Greener Places Design Guide (Government Architect NSW, 2020) • State Infrastructure Strategy 2022-2042: Staying Ahead (Infrastructure NSW, 2022) 	<ul style="list-style-type: none"> • Housing and Productivity Contribution (HPC) • North Sydney Local Infrastructure Contributions Plan 2020 (NSLICP)

Figure 5 Overview of policy and strategic setting

An overview of themes and directions from this suite of documents is set out in Table 2.

Table 2 Policy and strategy framework themes

Theme	Description
Population growth and change	<ul style="list-style-type: none"> • Rezoning of land in the Crows Nest TOD enables capacity for 5,900 additional homes and 2,500 jobs • The new metro station at Crows Nest will attract further development and people to move to the area with improved access to public transport



Theme	Description
	<ul style="list-style-type: none"> • New development and population growth will generate demand for new and upgraded public open spaces, community facilities and active transport links • Service growing communities with adequate and timely infrastructure to maintain sustainable communities
Transition to a higher-density urban environment	<ul style="list-style-type: none"> • Growing community demand for diverse recreational opportunities which include both structured sports and informal leisure • Co-location of facilities to maximise accessibility • Focus on quality, well-maintained and multi-functional spaces. Prioritise equity and accessibility for the community • Focus on maintaining and optimising existing facilities and spaces alongside developing new infrastructure • Promote smaller-scale improvements in local amenities and support 15-minute neighbourhoods • Council to "develop a masterplan and feasibility study for consolidating a new community centre, underground car parking and a significant new area of open space for Crows Nest on the site which currently accommodates the Holtermann Street carpark, Crows Nest Community Centre and Ernest Place."
Direct funding towards infrastructure to support new developments	<ul style="list-style-type: none"> • The NSW Government has committed \$520 million for community infrastructure in TOD Accelerated Precincts, including critical road upgrades, active transport links, and public open spaces. • The Housing and Productivity Contribution (formerly Special Infrastructure Contribution for St Leonards and Crows Nest) is a mechanism for collecting funds from new developments to contribute towards state and regional infrastructure such as schools, hospitals, major roads, and regional open space. • Council will continue to collect local infrastructure contributions for local infrastructure needs.

Previous strategies and studies

This report builds on previous needs assessments conducted for the St Leonards Crows Nest precinct and the North Sydney local government area. These include:

- Draft North Sydney Open Space and Recreation Strategy (North Sydney Council, 2024)
- North Sydney Open Space and Recreation Needs Study (Ross Planning for North Sydney Council, 2024)
- St Leonards and Crows Nest Social Infrastructure and Open Space Study (Arup for the NSW Department of Planning and Environment, 2018)



Previous studies have assessed social and community infrastructure needs in relation to population growth and development, and established priorities to identify the investment required to meet this future needs. The proposed development aligns with the growth priorities and directions set by NSW Government for Crows Nest.

The following matters have been identified in previous strategies and studies, and have been considered in this assessment:

- **Existing open space deficit and increasing pressure from growth:** Crows Nest has an existing deficit in open and recreation space, resulting in immense pressure on the existing infrastructure from the current population and anticipated growth. Open space in North Sydney LGA is not evenly distributed and Crows Nest is an area with very low provision of open space per person. This creates a critical challenge in maintaining liveability and meeting community needs for outdoor space.
- **Need for new, diverse, and enhanced multi-functional spaces and facilities:** To cater to future demand from a larger and more diverse population, there's a recognised need to not only increase the quantum of open space but also to deliver new, high-quality, well-designed, and potentially multi-functional community facilities and recreational areas. The *North Sydney Draft Open Space and Recreation Strategy (2024)* proposes an action to deliver a masterplan for the Holtermann Street carpark site in Crows Nest, which aims to consolidate a new community centre, public car parking, and new open space, demonstrating an approach towards integrated and intensified use of available land.
- **Evolving community preferences for active lifestyles and diverse recreational opportunities:** There is a shift in community preferences towards more active lifestyles and a broader range of recreational pursuits beyond traditional organised sports. This translates to increased demand for informal recreation spaces, walking and cycling paths, outdoor fitness equipment, programmable community spaces, and facilities that support social interaction, health, and wellbeing, all of which need to be factored into the planning and design of new and upgraded infrastructure.
- **Challenges in securing land and optimising existing assets in a densifying urban environment:** A major challenge in Crows Nest is the scarcity and high cost of land, making it difficult to acquire new large parcels for open space or community facilities. This necessitates innovative approaches, as highlighted in the *North Sydney Draft Open Space and Recreation Strategy (2024)*, such as:
 - Maximising existing resources
 - Re-purposing under-utilised civic spaces
 - Upgrading existing parks to improve their capacity and functionality
 - Exploring opportunities for co-location of facilities or development of open space as part of new private and public projects.
- **Emphasis on equitable access, connectivity, and quality of experience:** The provision of social infrastructure and open space is not just about quantity but also about equitable access for all community members, regardless of age, ability, or socio-economic status. This includes considering well-distributed facilities, safe and convenient pedestrian and cyclist connections between residential areas and recreational spaces, and the overall quality, safety, and amenity of these public assets to ensure they effectively meet diverse community needs.



4. Community profile

4.1 Social baseline

Population

As of 2021, the local catchment contains 27,768 people. The median age of residents is 34, which is lower than the Greater Sydney median of 37.

The community is made up of people from diverse cultural backgrounds. Table 3 below shows that over a quarter of residents in the local catchment nominated their first ancestry as English, followed by 15% Chinese and 12% Australian.

This indicates that there may be a need for diverse cultural facilities within the catchment to cater towards people of differing ancestries.

Table 3 Ancestry 1st response – Top 5 (Source: ABS Census 2021)

Ancestry 1 st response	Number of residents	Percentage
English	7,765	27%
Chinese	4,390	15%
Australian	3,493	12%
Irish	1,654	6%
Indian	1,225	4%

Approximately one quarter (7,063 people) of the catchment's residents have at least one long term health condition. This means that a quarter of the catchment's residents may require additional community infrastructure and services to fulfill their needs.

Households

Most residents in the local catchment live in apartment buildings. As shown in Table 4 below, almost four fifths of all residents live in an apartment, while less than 10% live in detached homes.

This may indicate that residents have less private open space and minimal access to backyards, creating demand for public open space.

Table 4 Catchment dwelling structure (Source: ABS Census 2021)

Dwelling structure	Number of dwellings	Percentage
Separate house	1,311	8.3%
Semi-detached	1,812	11.4%
Apartment	12,660	79.8%
Other and not stated	86	0.5%



Most households are in the top 3 Index of Relative Socio-economic Disadvantage (IRSD) deciles. This indicates that the precinct has a relatively low level of disadvantage.

However, as shown in Table 5 below there are 194 households in the 3rd decile, which means these households are within the 30% most disadvantaged households in Australia. This may mean that these households are more likely to seek out community services, particularly those targeted towards people experiencing disadvantage.

Table 5 Local catchment Household Index of Relative Socio-economic Disadvantage deciles (Source: ABS Census 2021)

IRSD Decile	Number of households
1	0
2	0
3	194
4	0
5	0
6	484
7	753
8	1,275
9	7,295
10	5,954

Approximately 63% of households in the local catchment have over \$104,000 in annual income. Table 6 below presents a breakdown of key household income brackets in the local catchment.

Table 6 Local catchment household income ranges (Source: ABS Census 2021)

Income range	Number of households	Percent of households
Income not stated	491	4%
Nil or negative income	237	2%
\$1-\$51,999 per year	1,570	11%
\$52,000-\$103,999 per year	2,748	20%
\$104,000-\$207,999 per year	4,464	33%
\$208,000+ per year	4,189	31%

Households with lower incomes (such as those with less than \$52,000 per year) may be more likely to seek out free or subsidised community services and infrastructure, dependent on other extenuating circumstances.



Over half of households in the local catchment are renters.

As shown in Table 7 below, 56% of households rent, while only 19% own their home outright. The higher proportion of rental households can indicate a community that may be more transient and younger, attracted to the area by new apartment developments.

Table 7 Local catchment household tenure (Source: ABS Census 2021)

Tenure	Number of households	Percent of households
Owned outright	2,623	19%
Owned with a mortgage	2,880	20%
Rented	7,857	56%
Other and not stated	517	5%

4.2 Projected community

This report compares population and workforce projections against benchmarks to provide an estimate of community infrastructure needs at a local and regional catchment. This section provides an overview of the data sources, limitations and analysis outcomes.

Data used

Astrolabe has collated population and employment projections for the local and district catchments using Transport for NSW's Travel Zone Projections 2024 (TZP24), released in December 2024.

These projections are designed to align with the NSW Common Planning Assumptions at a Statistical Area 2 (SA2) level. TZP24 projections also consider Transit Oriented Developments (TODs) considered in the 2023 Sydney Housing Supply Forecast; TODs announced prior to April of 2024.²

Limitations

TfNSW notes that Travel Zone population projections in the Greater Metropolitan Area have a 'High' reliability rating from 2021 to 2041. However, reliability becomes 'Low' for the 2042-2066 period. Only projections to 2041 have been used in this study.

Age-sex projections are given a 'Medium' reliability level for 2026-2041 projections, meaning input data and other variables considered in these projections may be limited. Age-sex projections in this report are only to be taken as indicative at a point in time.

Employment projections are given a 'Medium' reliability level for the 2031-2041 period. Employment projections for this period should only be taken as indicative at a point in time. Employment projections also do not distinguish between resident workers and the total workforce.

² New South Wales Travel Zone Projections (TZP24) Technical Guide, <https://www.transport.nsw.gov.au/data-and-research/reference-information/travel-zone-projections-2024-tzp24>, p. 114.



Projected resident population

The local catchment is projected to grow significantly compared to the broader district.

Table 8 below shows that the local catchment population is projected to increase by 13,330 from 2025 to 2041, representing a 40% increase. The broader district is projected to grow by 23,358 people, which is an increase of 12%.

Table 8 Catchment population projections (Source: Transport for NSW 2024)

Geography	Estimated resident population				
	2025 (now)	2026	2031	2036	2041
Local catchment	32,954	33,408	39,864	43,757	46,284
District catchment	194,945	196,477	207,280	213,746	218,303

Figure 6 below shows that the proportion of people aged 45 and over is projected to increase in the local catchment. At the same time, the proportion of young professionals (25-39 year olds) is projected to remain the largest cohort but to a lesser extent.

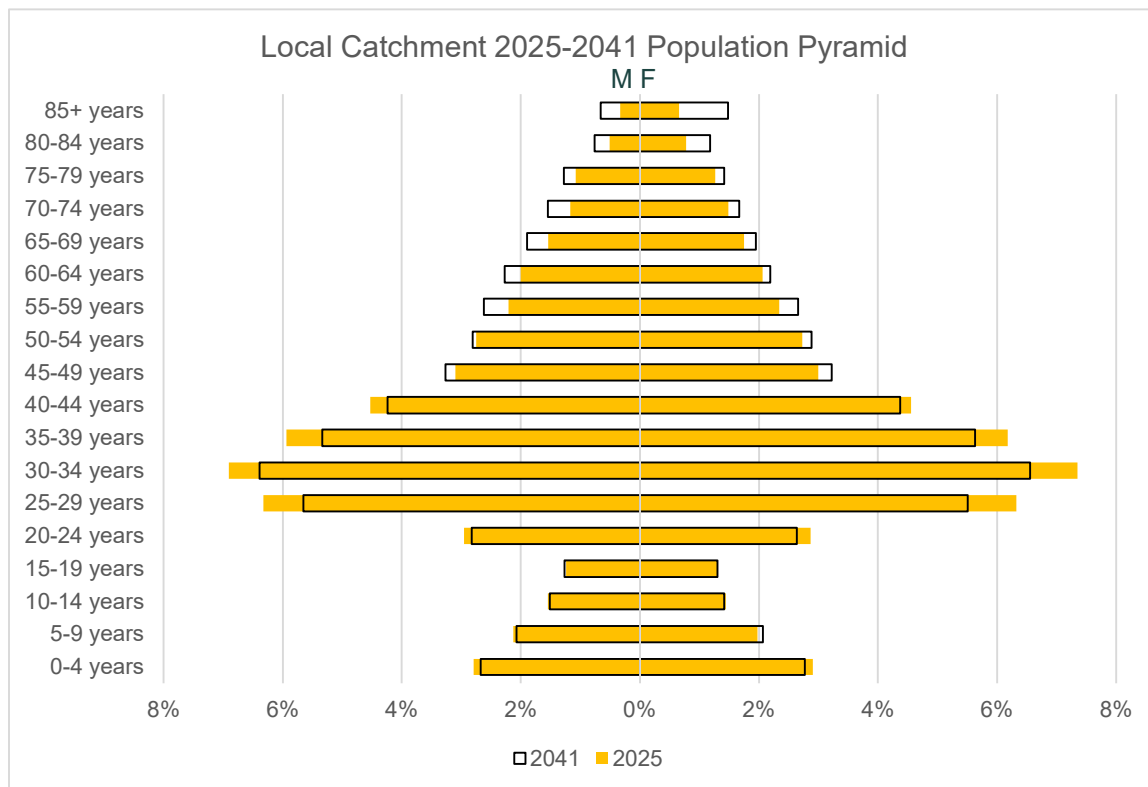


Figure 6 Local catchment population pyramid (Source: Transport for NSW 2024)

Error! Reference source not found. below shows that the proportion of the population aged 0-19 years old is projected to decrease by approximately 0.2%. This indicates that the proportion of children is projected to be stable and the demand for public parks, play spaces and primary schools is expected to remain consistent.



Table 9 School age group projections (Source: Transport for NSW 2024)

Age group	2025 estimate (no.)	2025 estimate (%)	2041 projection (no.)	2041 projection (%)
0-4 years	1,849	5.7%	2,483	5.4%
5-9 years	1,332	4.1%	1,889	4.1%
10-14 years	970	3.0%	1,337	2.9%
15-19 years	824	2.5%	1,173	2.6%

Figure 7 below shows that the district catchment is projected to maintain a relatively even age group spread. However, similar to the local catchment, the proportion of people over the age of 55 is projected to increase.

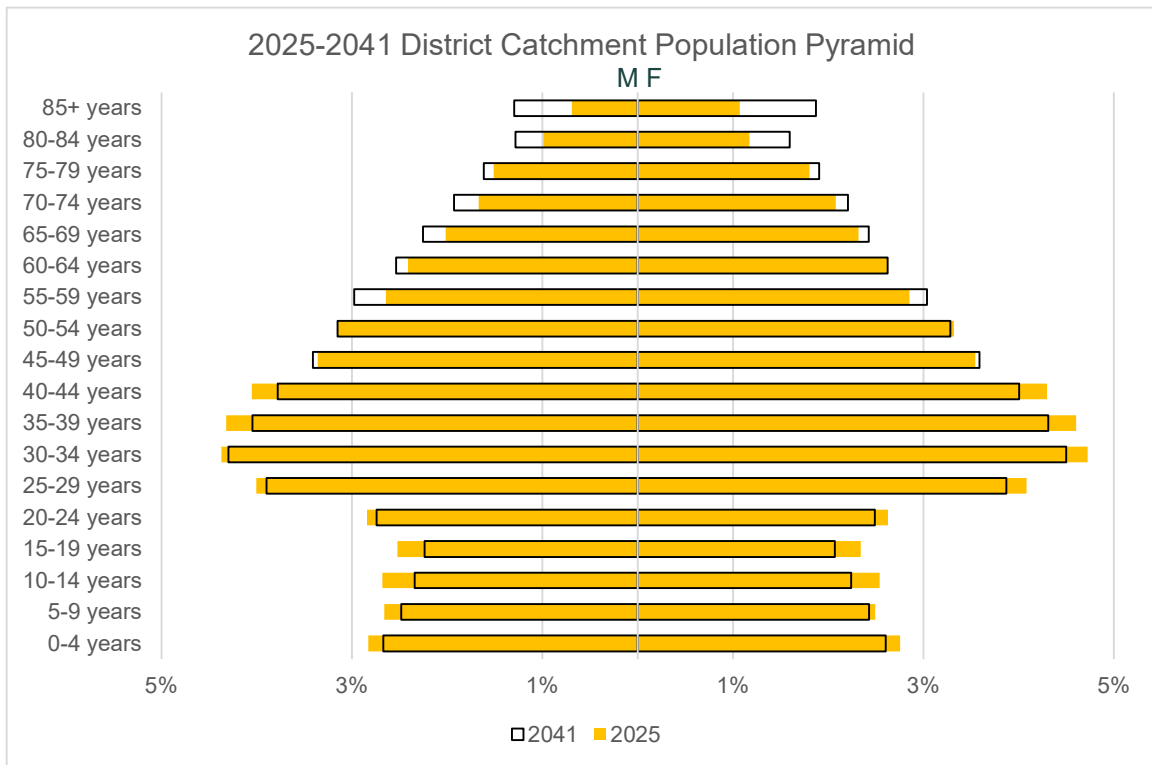


Figure 7 District catchment population pyramid (Source: Transport for NSW 2024)

Projected workforce

Table 10 below shows the projected number of people who will work in the local and district catchments between 2025 and 2041. It shows that employment in the local catchment is projected to increase by 20% from 2025 to 2041.



Table 10 Catchment employment projections (Source: Transport for NSW 2024)

	Projected workforce				
Geography	2025 (now)	2026	2031	2036	2041
Local catchment	38,577	39,492	42,960	44,794	46,453
District catchment	200,224	201,998	209,221	214,305	218,909

Projected industries of employment for 2026 and 2041 – show that we expect it to be mainly based on population serving industries – therefore we need more passive open space to cater for these needs.

The proposed development is providing 3,721 square meters GFA of non-residential floorspace for retail and employment uses such as medical service suites, professional suites and possible entertainment spaces.

A Market and Economic Assessment conducted by HillPDA provides an assessment on the current and forecasted jobs for the proposed development and estimates future employment on the site would be around 66 fewer workers than if both existing buildings were fully occupied. The proposed development reduces the current provision of non-residential floorspace to enable residential development, and therefore generates less demand for social and community infrastructure from workers.

4.3 Site development scenarios

Development demand profile

The proposed development is for a new 16-storey mixed-use development that will create 168 build to rent units and 3 podium levels comprising non-residential uses such as medical centre, retail, and residential uses (build to rent units and residential amenity facilities such as a gym and sauna, steam room, outdoor pool, class space, cinema room, co-working space).

The proposed development will introduce new residents to the site, however will be reducing the number of workers on the site with the reduction in commercial floorspace compared to the existing 5 storey commercial building. Therefore the development demand profile is focussed on the expected number of residents in the proposed development.

The proposed development is expected to accommodate 333 residents. Most households are expected to be lone and couple only households. Assumptions on the number of new residents and household types in the proposed development has been used to inform the infrastructure needs assessment in Section 5.

Table 11 shows the mix of dwelling types in the proposed development (SSD-79658964) and an estimate of the residential population based on existing household size trends for rented apartments in the local catchment. Table 12 shows the assumed number of each household type (broken down by households with children and without children) expected to live in the proposed development based on analysis of trends in the local catchment shown in Table 13.



Table 11 Development dwelling mix and baseline population

Development type	Provision	Percentage	Persons per 1 unit ³	Resulting number of persons
Build-to-rent component				
Studio apartment	20	12%	1.1	22
1-bed apartment	54	32%	1.4	76
2-bed apartment	48	29%	2.1	101
3-bed apartment	44	26%	2.9	128
4-bed apartment	2	1%	3	6
Total	168	100%	N/A	333

Table 12 Assumptions for household types

	Total	Households with children	Couple households	Group households	Lone households
Studio apartment	20	0	2	0	18
1-bed apartment	54	0	19	0	35
2-bed apartment	48	10	24	5	9
3-bed apartment	44	21	10	10	3
4-bed apartment	2	1	1	0	0
Total	168	37	49	16	66
Proportion of households		19%	33%	9%	39%

The proposed development is expected to attract 37 families with children, based on current trends for household living in the rented apartments in the local catchment. This allows for a slightly higher representation of households with families that is currently observed in the local catchment (see Table 13)

The assumptions for household size and types is informed by analysis on current trends in the types of households living in rented apartments. Table 13 shows what types of households live in different sized rented apartments in the local catchment and is summarised by households with children compared to those without children.

Lone households and couple households are most representative of households living in rented apartments in the local catchment. These are the types of households the proposed development is expected to attract.

³ Based on the average number of persons per unit type in the local catchment, as shown in Figure 2, at the 2021 ABS Census.



Table 13 Household types by apartment size

Household type	Share of households	Studio	1-bed apartment	2-bed apartment	3-bed apartment	4-bed apartment
Households with children ⁴	16%	1%	2%	24%	53%	50%
Couple households	35%	6%	32%	43%	16%	50%
Group households	7%	0%	1%	11%	23%	0%
Lone households	40%	92%	63%	20%	8%	0%
Other ⁵	1%	1%	1%	2%	0%	0%

Alternate scenarios

In alternate scenarios this assessment considers, the number of residents and families with children varies which influences demand on community spaces, infrastructure, services and facilities. The demand profile from residents can vary depending on the tenants of the proposed development. Alternate scenarios are outlined in Table 14.

Table 14 Alternate scenarios and demand profiles

Scenario	Description	Assumptions	Estimated population
Alternate scenario 1: A greater share of couple and lone households	Less people overall will be living in the proposed development. There will be less children living in the proposed development.	Household numbers will drop with more couple and lone households renting 2- and 3-bedroom apartments rather than households with children.	310
Alternate scenario 2: More families with children	More people overall will be living in the proposed development and there will be a higher number of children.	Household numbers will increase with a higher share of households with children renting 2-, 3- and 4-bedroom apartments in the proposed development. This will be higher than observed trends for the local catchment.	345

⁴ Counting one family households 'couple family with children' and 'one parent family'

⁵ Counting 'other family' and 'other household' categories



5. Infrastructure needs assessment

5.1 Infrastructure benchmarks

Astrolabe have applied benchmarks to assess the level of accessibility to community infrastructure within the local subject site precinct. Benchmarks have also been used to assess potential demand generated by the proposed development.

Section 5.2 below presents benchmark tables which provide detail regarding:

- The number of each community infrastructure item within the precinct
- The benchmark applied to assess infrastructure need
- A qualitative assessment of the current state and capacity of these infrastructure items
- A quantitative assessment of potential demand generated by the proposed development, assessed using relevant benchmarks

Appendix B presents a complete list of applied benchmarks and sources.

5.2 Local infrastructure needs assessment

The following section breaks down existing infrastructure provision and gap, future need and need induced by the proposal for different infrastructure assets. These assets include:

- Libraries and community centres
- Child and youth facilities
- Primary school facilities
- Local sport and play facilities
- Local open and recreation space.

Libraries and community centres

There are 3 libraries and 2 community centres in the local catchment.

Figure 8 shows the location of these community centres and libraries. These are easily accessible to the proposed development.

The proposed development is expected to generate minimal additional demand on existing library and community centres (Table 15).

North Sydney Council has identified an opportunity in their *Draft Open Space and Recreation Strategy (2024)* to investigate development of a new community centre, car parking and significant area of open space around the current Holtermann Street car park, Crows Nest Community Centre and Ernest Place. Delivery of this project will further improve the quality of the existing community centre and potentially improve the diversity of activities that can be accommodated to better meet growing needs in the future with additional development.



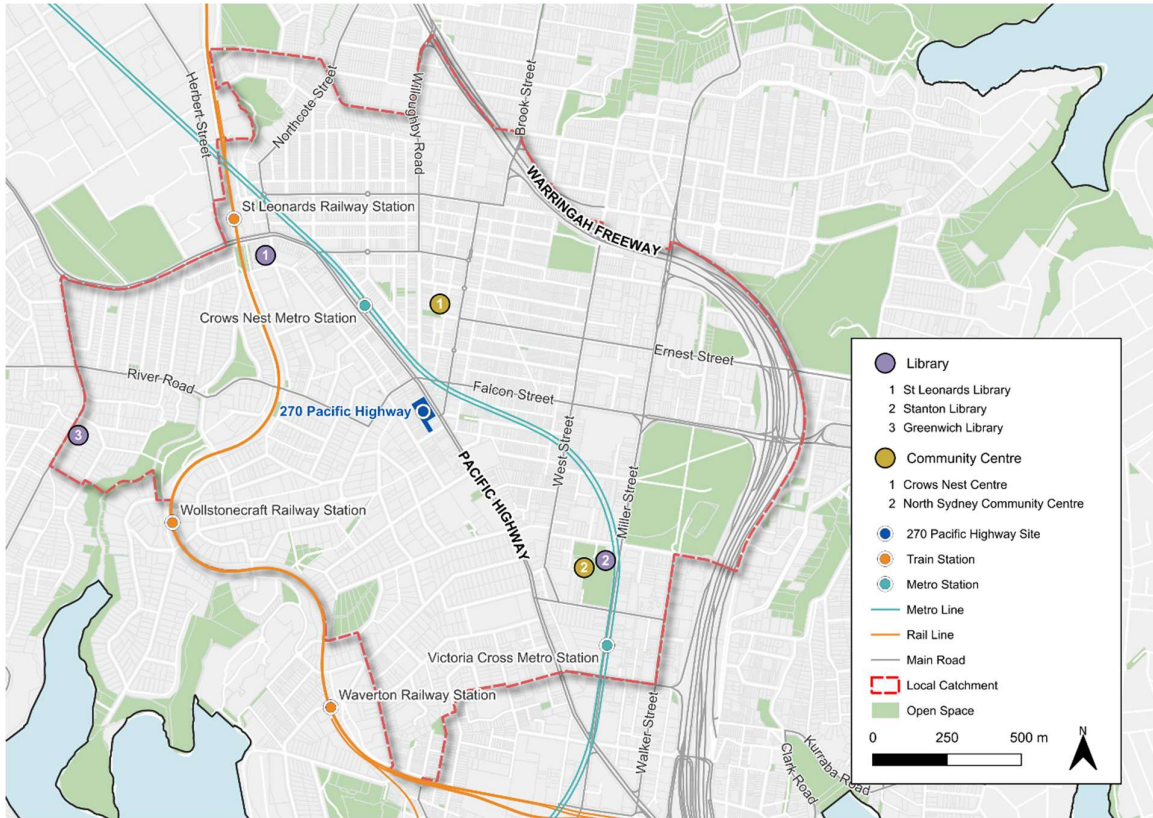


Figure 8 Libraries and community centres

Table 15 Library and community centre facilities benchmarking

Infrastructure item	Total number of current facilities	Resident benchmark	Current rate of provision	Need induced by proposal
Library branch	3	1 per 20,000 people	Good	0.02 facilities
Community centre	2	1 per 15,000 – 20,000 people	Ok - could improve	0.02 facilities

Child and youth facilities

Table 16 below shows demand for daycare and play group facilities. The proposed development is estimated to generate demand for 8 childcare centre places, based on the assumptions set out in Section 4.3 of this report including the alternate scenario with more households with children. The current rate of provision of childcare centres in the local catchment area is good and can accommodate for potential additional demand from the proposed development.



Table 16 Childcare and play group facilities benchmarking

Infrastructure item	Total number of current facilities	Resident benchmark	Current rate of provision	Need induced by proposal
Long day childcare centre	1,307 spaces	1 place per 2.48 children aged 0-4	Good	7.26 places ⁶
Play group	3 facilities	1 per 4,000 – 6,000 people	Ok - could improve	0.06 – 0.08 facilities

Primary school facilities

There are 2 government primary schools in the local catchment and an additional four government primary schools in the broader school catchment area.

Additionally, there is one Catholic primary school and 5 Outside of School Hours (OOSH) facilities. One of these services is provided at a government primary school, two are provided on private school campuses, and two are provided separate to schools altogether

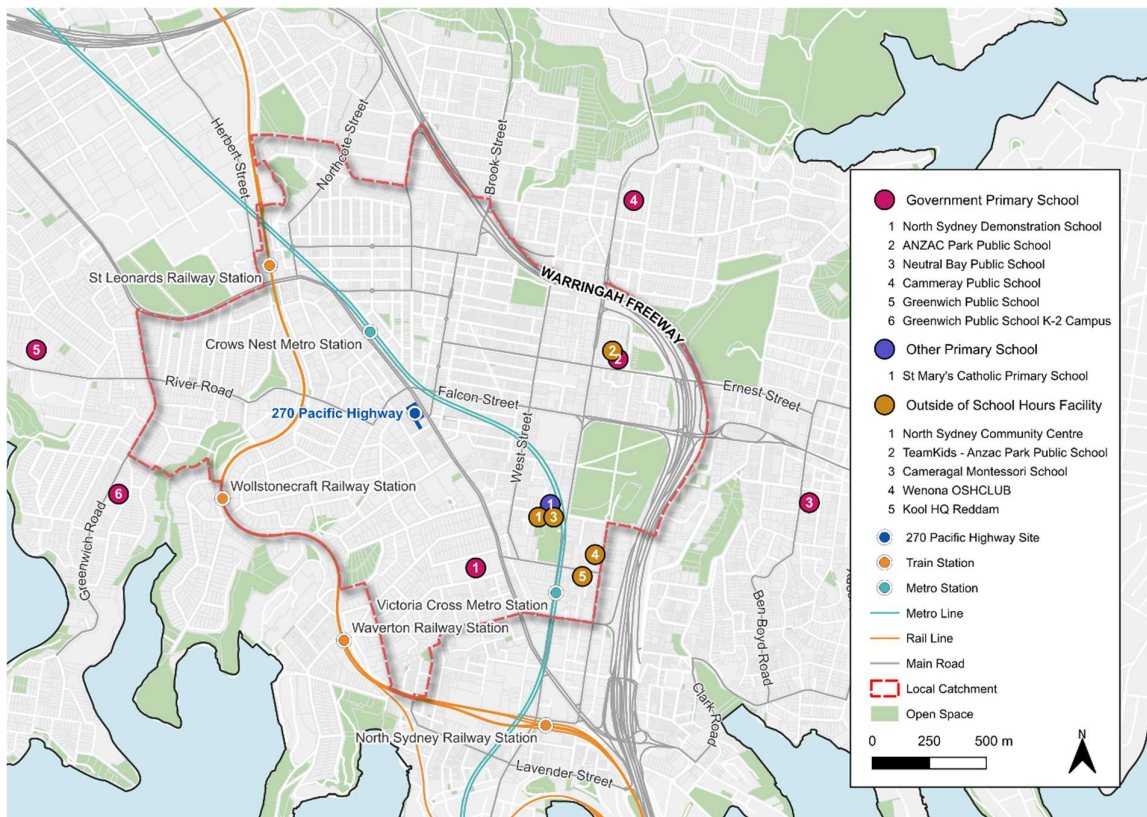


Figure 9 Local primary school facilities map

⁶ Assuming 5.7% of the residential population is aged 0-4 years based on the age group breakdown of the current population in the local catchment.



The proposed development is expected to generate minimal demand on primary schools. Even under the alternate scenario 2 with more families with children renting apartments in the proposed development, the demand will be minimal.

Analysis in Section 4.3 of this report shows the dwelling mix of the proposed development is expected to attract predominantly couple-only and lone households.

Table 17 Primary school facilities benchmarking

Infrastructure item	Total number of facilities	Resident benchmark	Current rate of provision	Need induced by proposal
Government primary school	2	1 facility per 9,000 people	Ok - could improve	0.04 facilities
Outside of School Hours (OOSH) facility	5	1 facility per 4,000-6,000 residents	Ok - could improve	0.06 – 0.08 facilities

The previous study *St Leonards and Crows Nest Social Infrastructure and Open Space Study*⁷ found that there is a growing demand for schools in the Willoughby and Chatswood areas and that pressure from growth on schools is likely to increase with development. The Department of Education is aware of this need and investigating models of school provision to service the needs of the growing and changing community in the area across the local school catchment. OOSH facilities are planned and delivered in association with schools.

Local sport and play facilities

The local catchment contains 17 tennis, 4 outdoor basketball courts and 8 play spaces.

The proposed development generates minimal additional demand for these local sport and play facilities (Table 18).

Figure 10 and Figure 11 show the location of these facilities in relation to the proposed development. These facilities provide diversity in sport and recreation spaces, including casual access during daylight hours, and are within an easy walking distance to the proposed development.

The Open Space and Recreation Needs Study (2024), commissioned by North Sydney Council, identifies directions for the following facilities:

- Tennis courts - no need for new courts
- Outdoor basketball courts – investigate provision of outdoor courts/ half courts when opportunities arise
- Play spaces – investigate opportunities to increase the diversity and quality of play spaces including variation in spaces to cater for older children

⁷ St Leonards and Crows Nest Social Infrastructure and Open Space Study (Arup for the NSW Department of Planning and Environment, 2018)



Table 18 Local sport and play facilities benchmarking

Infrastructure item	Total number of facilities	Resident benchmark	Current rate of provision	Need induced by proposal
Tennis court	17 total courts	1 per 2,000 people	Ok - could improve	0.17 facilities
Outdoor basketball court	4 total courts ⁸	1 per 3,000 – 4,000 people	Ok - could improve	0.08 – 0.11 facilities
Play space	8 facilities	1 facility per 2,000 residents	Needs improvement	0.17 facilities

Local open and recreation space provision

There are approximately 5.63 hectares of open space within the local catchment.

The proposed development is estimated to generate demand for an additional 0.60 hectares of open space based on North Sydney Council's applied benchmark of 1.8 hectares per 1,000 residents.

Open space provision in the local catchment is currently already low (refer to Table 19).

North Sydney Council has identified an opportunity in their *Draft Open Space and Recreation Strategy (2024)* to investigate development of a new community centre, car parking and significant area of open space around the current Holtermann Street car park, Crows Nest Community Centre and Ernest Place. Delivery of this project will address the current rates of provision of local open and recreation space and contribute to meeting growing needs in the future with additional development.

Table 19 Local open space benchmarking

Infrastructure item	Total number of facilities	Resident benchmark	Current rate of provision	Need induced by proposal
Total open space	5.63 hectares	1.8 hectares per 1,000 residents ⁹	Needs improvement	0.60 hectares

Site open space accessibility and distribution

The proposal site does not have walkable access to local open space larger than 0.15 hectares.

The NSW Government Architect released the Draft Greener Places Design Guide in 2020, which contains performance benchmarks for open space in high and medium density areas.

The benchmarks are outlined in Table 20 below.

⁸ Indoor courts at the North Sydney Indoor Sports Centre will be assessed under the 'Indoor recreation centre' infrastructure item.
⁹ This metric is a standard adopted by North Sydney Council in its *North Sydney Local Infrastructure Contributions Plan 2020* and *2024 Open Space and Recreation Needs Study*. This benchmark is lower than industry standards due to low pre-existing open space provision and the significant challenges associated with developing new open space in the LGA.



Table 20 Open space distribution benchmarks (Source: NSW Government Architect 2020)

Open space type	Benchmark	Does the site meet the benchmark?
Local open space larger than 0.15 hectares in high-density areas	Access within 200 metres	No
Local open space larger than 0.3 hectares	Access within 400 metres	No

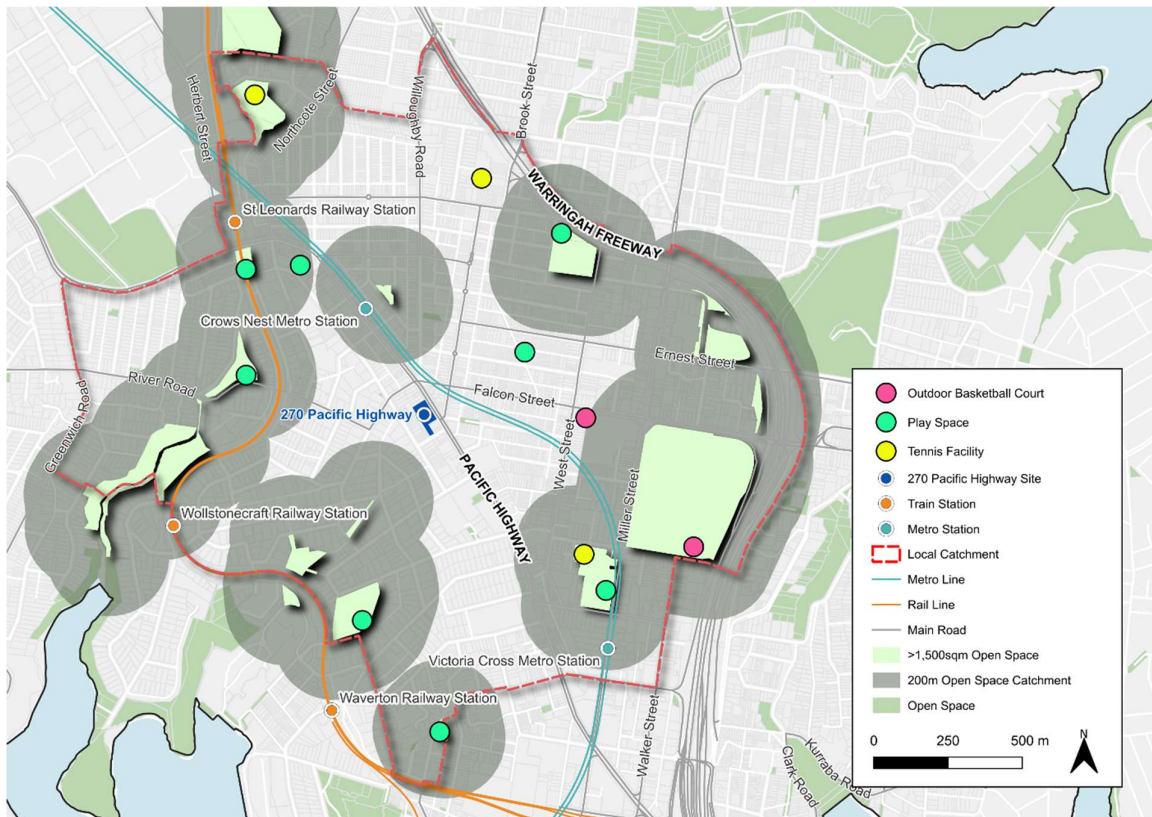


Figure 10 200 metre open space access catchments

However North Sydney Council assesses that accessibility to local parks in the local catchment is good with residents having access to a local park within 400m of their homes.¹⁰ This established network of open spaces provide a range of green, quiet and meditative spaces for residents.

¹⁰ North Sydney Open Space and Recreation Needs Study (Ross Planning for North Sydney Council, 2024)



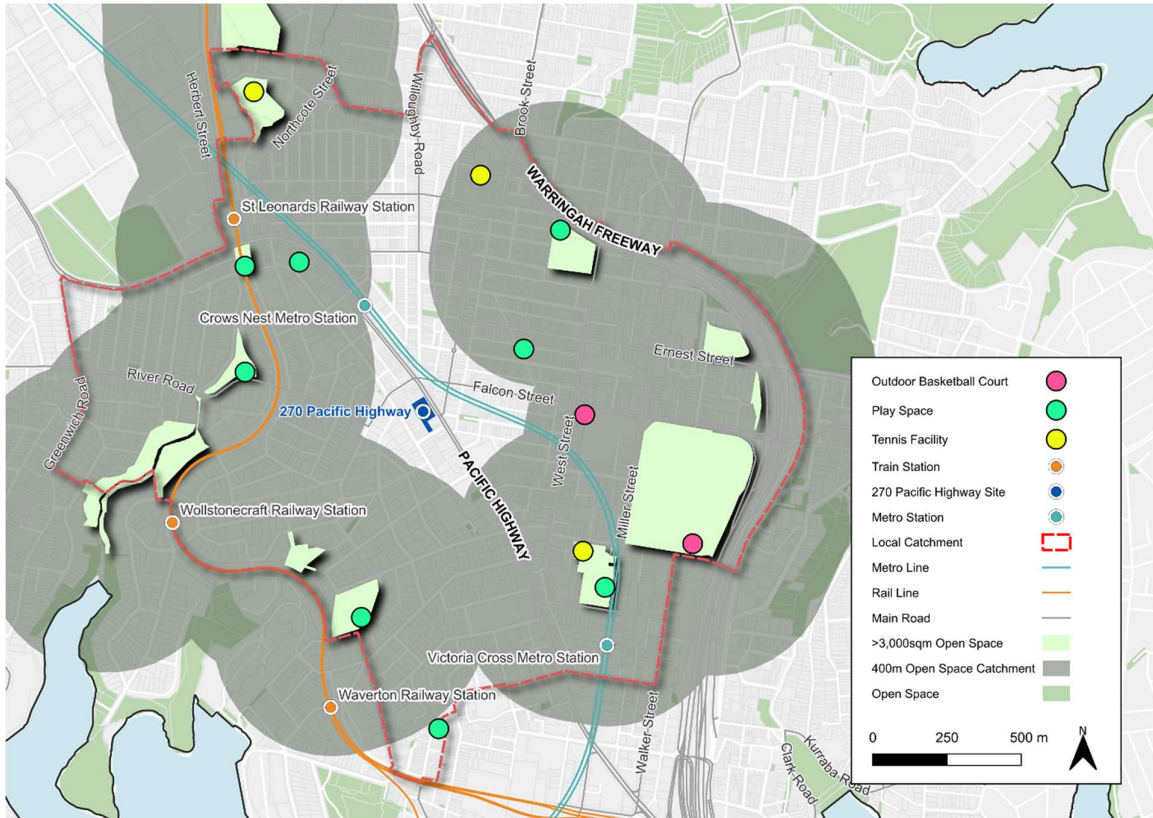


Figure 11 400 metre open space access catchments

The closest public open spaces to the proposed development are:

- Hayberry Street Road Closure park, located 100 metres east of the site
- Crows Nest Uniting Church Park pocket park, within 200m of the site
- Morton Lane Road Reserve, within 200 metres of the site.

The site has a high level of public transport accessibility, with bus and metro services that can provide quicker access to public open space of varying scales and types.

Implementation of North Sydney Council's Open Space and Recreation Strategy will see additional open spaces created and improvement to the quality of existing spaces in the local catchment.



5.3 District and regional infrastructure

The following section provides an overview of district and regional level community infrastructure in relation to the subject site. These assets include:

- Culture and recreation facilities
- Education facilities
- Health and emergency services.

Culture and recreation facilities

Figure 12 below shows the extent of district and regional level culture and recreation facilities across the district precinct.

As shown below, most facilities are centred around key transport centres such as Lane Cove, Chatswood and North Sydney.

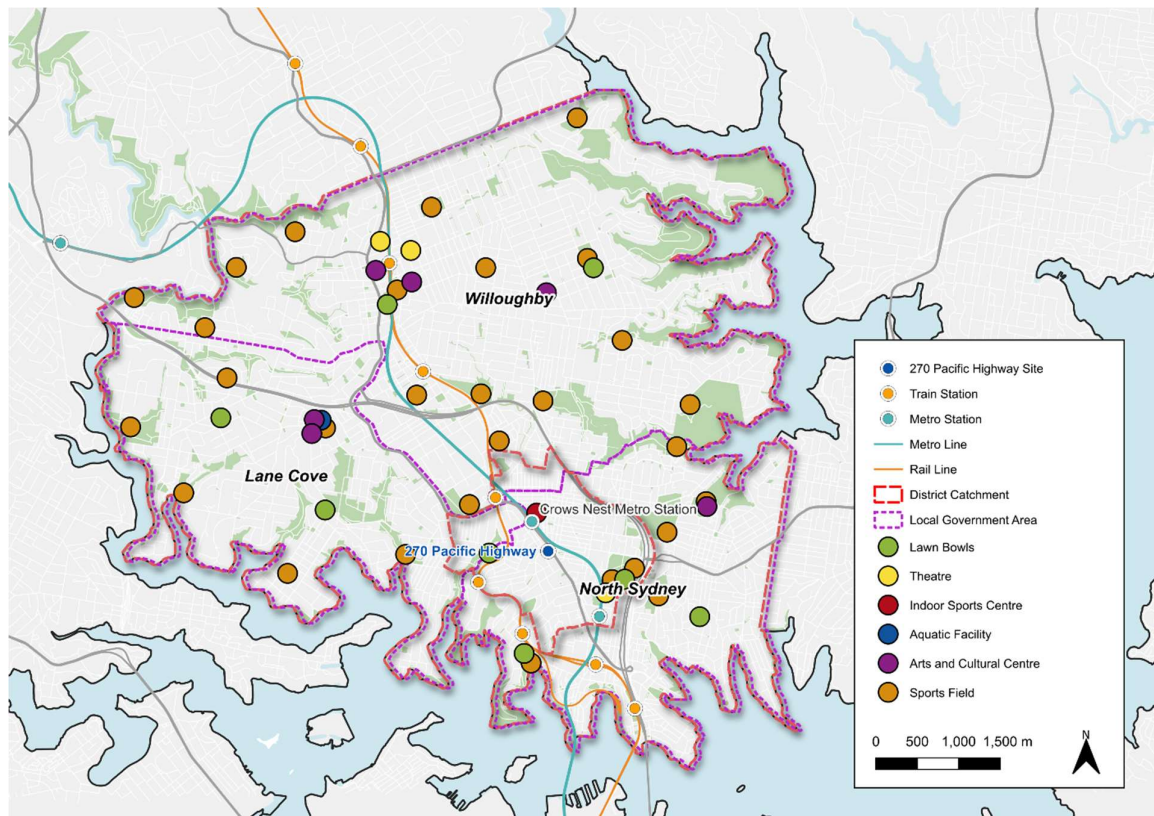


Figure 12 District and regional culture and recreation facilities

The subject site has adequate access to district sports field infrastructure, with the Gore Hill Oval accessible within a 20-minute walk. The North Sydney Indoor Sports Centre is an 8-minute walk from the site.

The site has enhanced access to significant regional recreation spaces outside of the catchment through the new Crows Nest metro station. It provides access to Barangaroo Reserve via Barangaroo Station (5-minute ride) and Lane Cove National Park via North Ryde Station (9-minute ride).



The district has the potential to increase limited sport and recreation facility access by promoting co-locating uses at school sites. Mowbray Public School in Lane Cove North already provides community access to the school oval outside of school hours.

Education facilities

Figure 13 below depicts the distribution of youth and education facilities across the district precinct.

As shown below, there is a significant concentration of secondary and tertiary education facilities in North Sydney. This is attributed to the presence of several private and select secondary schools, as well as various specialised registered training organisations.

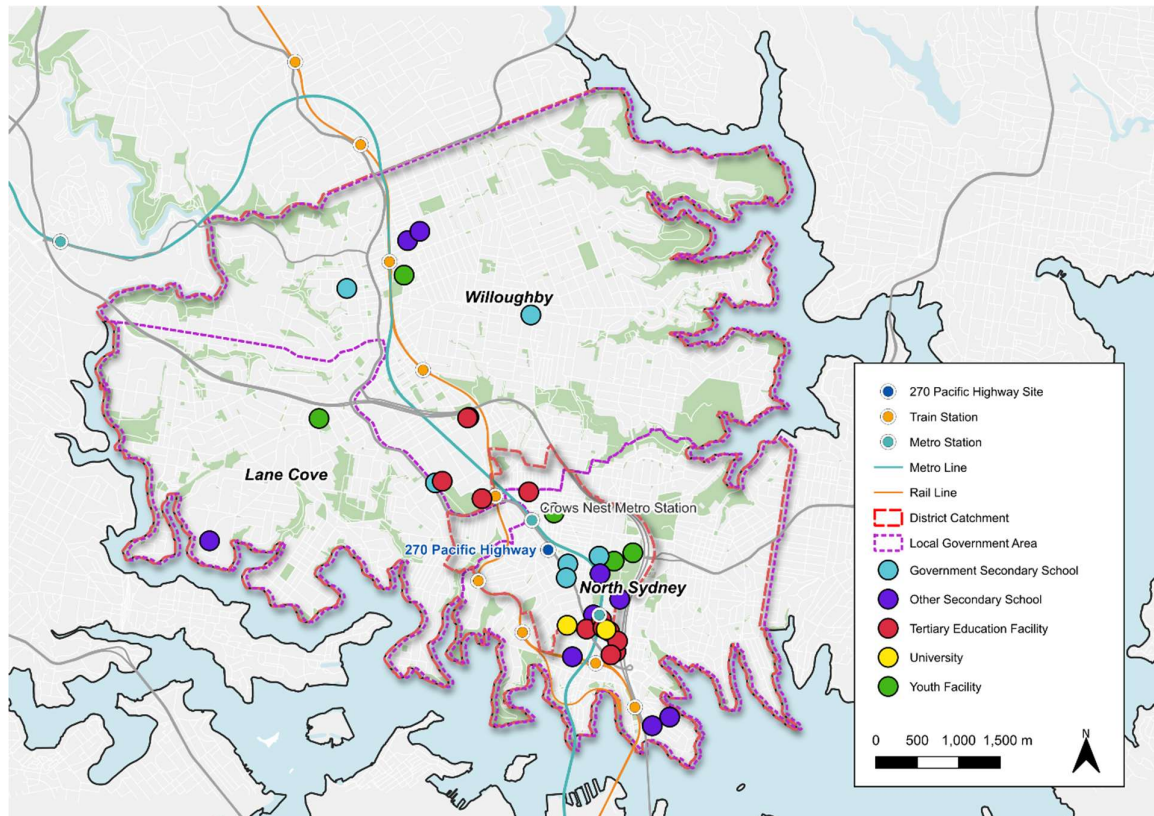


Figure 13 District education facilities

The subject site has access to the St Leonards TAFE campus within 12 minutes using public transport along the Pacific Highway. North Sydney hosts two university campuses; the Australian Catholic University and Charles Sturt University.

The central location of the subject site presents prospective residents with choice between specialist government (Bradfield College and selective schools), traditional government secondary (Cammeraygal High School) and private secondary schools.

The Crows Nest Metro Station provides improved access to universities outside the catchment, such as Macquarie University, the University of Sydney and the University of New South Wales.



Health and emergency services

Figure 14 below shows the distribution of health and emergency services in the district precinct.

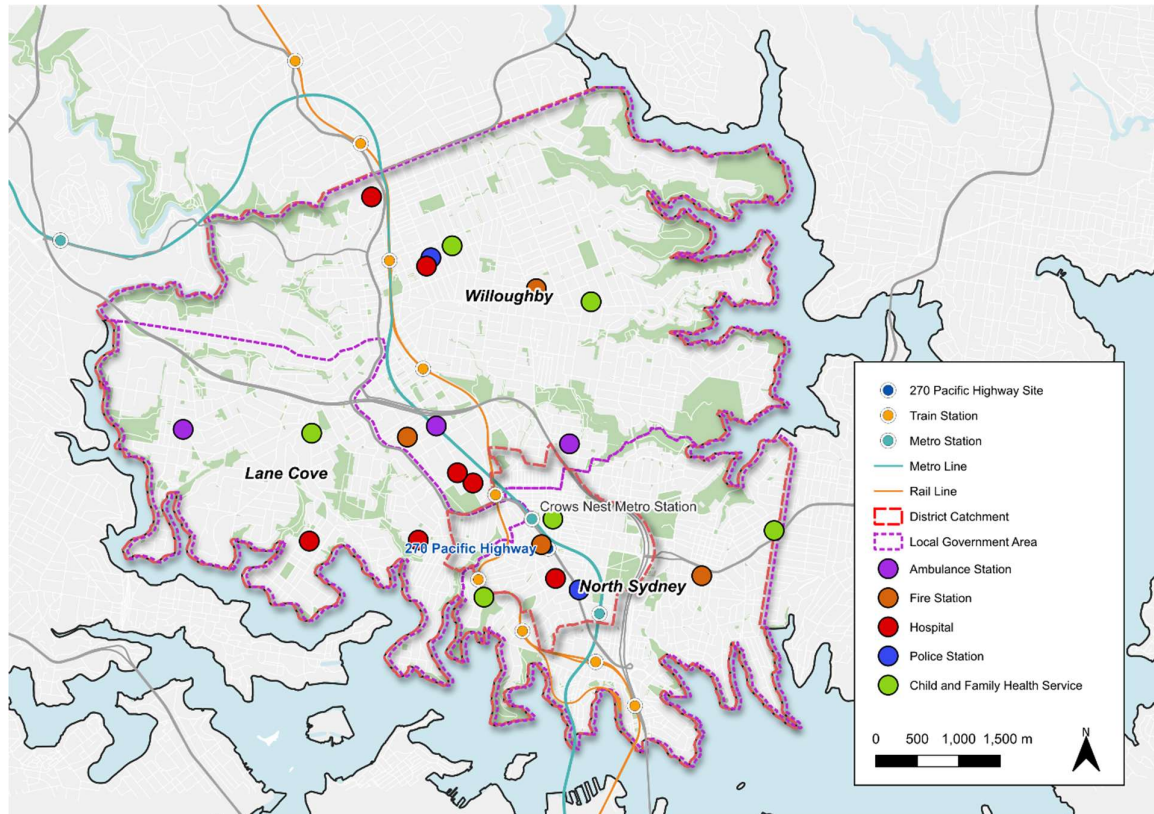


Figure 14 District health and emergency services

As shown above, the subject site is well-located with regard to district-level health services. The Crows Nest Child and Family Health Centre is located a 7 minute walk away, and the Royal North Shore public hospital a 20-minute walk away.

The Crows Nest Fire Station is located on the same block as the proposed development, providing the site with a high level of access to fire services.

The precinct has one public and six private hospitals which provide various specialist and emergency care services.



6. Findings and conclusion

6.1 Needs assessment findings

This social and community needs assessment has determined that the proposed development will generate relatively modest demand for additional social and community infrastructure.

These relatively modest demands reflect the expected demographic profile of future residents. Based on detailed demographic analysis of current rental housing trends in the local catchment, the 168 build-to-rent apartments are projected to attract predominantly couple-only households (33%) and lone person households (39%), with only 19% of dwellings likely to be occupied by families with children. This household composition profile generates less demand on certain infrastructure types, particularly those serving families and children, such as playgrounds, primary schools, and childcare facilities.

The development is projected to be home to around 300 residents. An assumption of 333 residents has been applied to benchmarks to test the demand generation for infrastructure, including testing accommodation of up to 345 residents in a higher occupancy scenario with more families with children living in the proposed development.

Demand for more open space with the growth in population and provision of more open space this is the greatest challenge for the Crows Nest area. Government studies, including the *St Leonards and Crows Nest Social Infrastructure and Open Space Study (2018)* and *North Sydney Open Space and Recreation Needs Study (2024)*, have established that the Crows Nest area already experiences a significant deficit in open space provision.

The projected residents would generate demand for 0.60 hectares of additional open space, representing the most significant infrastructure need. Effectively, the development generates modest demand for recreational facilities including 0.17 tennis courts, 0.08-0.11 outdoor basketball courts, and 0.17 play spaces. For community facilities, the development would generate demand for 0.02 library facilities and 0.02 community centres. Regarding childcare and education facilities, the demand would include up to 8 childcare places, 0.06-0.08 play group facilities, 0.04 primary school facilities, and 0.06-0.08 Outside of School Hours (OOSH) facilities.

North Sydney Council has recently completed their *Draft Open Space and Recreation Strategy (2024)*, which proactively addresses the existing infrastructure gap by identifying specific opportunities to increase both the quantity and quality of open and recreation space. A key initiative identified in this strategy is the potential development of a masterplan for the Holtermann Street car park site, which would consolidate a new community centre, car parking, and significant new open space. This strategic approach recognises the challenges of acquiring new land in a densifying urban environment and seeks to maximise the utility of existing assets through innovative, multi-functional design solutions.

While the proposed development will generate some additional demand for social infrastructure, the site's excellent accessibility to public transport, including the recently opened Crows Nest Metro Station, provides residents with convenient connections to district and regional-level facilities beyond the immediate catchment. Additionally, the non-residential components of the development may potentially accommodate services such as medical facilities or recreational spaces that could benefit both residents and the wider community.



6.2 Provisions in the proposed development design

The proponent will be making financial contributions towards infrastructure delivery to support growth. Contributions will be made for:

- The NSW Government's Housing and Productivity Contribution (HPC) at a rate of \$10,000 per dwelling
- The North Sydney Local Infrastructure Contributions Plan 2020 at a rate of 1% of the cost of development.

The proposed development includes amenity facilities for residents in the non-residential floorspace, including provision of gym and sauna, steam room, outdoor pool, class space, cinema room, co-working space, and communal open space. These spaces meet residents' needs for social interaction, recreation and open green spaces and reduce reliance and demand pressures on existing spaces in the local catchments.

The proposed development will be providing streetscape upgrades that will facilitate improved public domain and pedestrian access surrounding the site. This contributes to improving the footpath network and amenity for people walking across the local catchment and accessing existing facilities and nearby pocket parks.

6.3 Conclusion

The proposed development generates modest demand for additional infrastructure. The design of the proposed development and integration of residential amenity facilities generates overall positive benefits for residents and reduces demand on existing community facilities and open space in the local catchment.

Residential amenity facilities provide an opportunity to incorporate open green spaces to address existing shortfalls in open space in the local catchment. Non-residential floorspace in the proposed development will provide an opportunity for provision of additional services within the catchment, such as medical services.



Appendix A. Local catchment geographies

Table 21 lists Travel Zone (TZ21) and Statistical Area 1 (SA1) geographies used for the local catchment.

Table 21 Statistical geographies used in the local catchment

Geography	Specific geographies used	
Travel Zone 2021 (TZ21)	<ul style="list-style-type: none"> • 1832 St Leonards Park Rd and River Rd • 1845 St Leonards Australian Medical Association (NSW) • 1951 North Sydney Monte Sant Angelo • 1837 North Shore Veterinary Hospital • 1911 Wollstonecraft Rose and Macleod Plaza Crows Nest • 1950 North Sydney Oval • 1846 Wollstonecraft Smoothey Park • 1947 North Sydney Wenona School 	<ul style="list-style-type: none"> • 1844 St Leonards • 1916 Wollstonecraft Station 1914 North Sydney Girls High School • 1918 Waverton • 1949 Cammeraygal High School • 1915 Mater Hospital • 1910 Crows Nest Plaza • 1912 Crows Nest • 1913 Cammeray Miller St and Ernest St • 1842 St Leonards Station • 1908 North Sydney Lamont St • 1961 North Sydney Public School.



Geography	Specific geographies used		
Statistical Area 1	<ul style="list-style-type: none"> • 12101140109 • 12101140114 • 12101140120 • 12101140122 • 12101140124 • 12101140126 • 12101140127 • 12101140128 • 12101140130 • 12101140131 • 12101140132 • 12101140133 • 12101140134 • 12101140135 • 12101140136 • 12101168501 • 12101168503 • 12101168520 • 12101168526 • 12101168529 • 12104141401 • 12104141402 	<ul style="list-style-type: none"> • 12104141403 • 12104141404 • 12104141406 • 12104141407 • 12104141408 • 12104141409 • 12104141410 • 12104141414 • 12104141415 • 12104141416 • 12104141417 • 12104141419 • 12104141420 • 12104141421 • 12104141422 • 12104141424 • 12104141425 • 12104141426 • 12104141427 • 12104141428 • 12104141429 • 12104141430 	<ul style="list-style-type: none"> • 12104141431 • 12104141432 • 12104141433 • 12104141434 • 12104141435 • 12104141436 • 12104141437 • 12104141438 • 12104141439 • 12104141440 • 12104141441 • 12104141444 • 12104141701 • 12104141702 • 12104141712 • 12104141727 • 12104141735 • 12104141736 • 12104141737 • 12104141738 • 12104141739



Appendix B. Infrastructure benchmarks

Table 22 presents details of each benchmark used to assess demand generated by the proposed development in the local catchment.

Table 22 Community infrastructure benchmarks

Facility	Benchmark	Source
District branch library	1 per 20,000 – 50,000 people	Parks and Leisure Australia Western Australia Community Infrastructure Guidelines 2020
District community centre	1 per 15,000 – 20,000 people	Parks and Leisure Australia Western Australia Community Infrastructure Guidelines 2020
Long day childcare centre	1 space per 2.48 children aged 0-4 years	City of Parramatta Community Infrastructure Strategy 2020
Play group	1 per 4,000 – 6,000 people	Parks and Leisure Australia Western Australia Community Infrastructure Guidelines 2020
Government primary school	1 per 9,000 people	Planning for Community Infrastructure in Growth Areas (Australian Social and Recreation Research 2008)
Outside of School Hours (OOSH) facility	1 per 4,000 – 6,000 people	Parks and Leisure Australia Western Australia Community Infrastructure Guidelines 2020
Tennis court	1 per 2,000 people	Glen Eira City Council Tennis Strategy (2018)
Outdoor basketball court	1 per 3,000 – 4,000 people	Parks and Leisure Australia Western Australia Community Infrastructure Guidelines 2020
Play space	1 per 2,000 people	Parks and Leisure Australia Western Australia Community Infrastructure Guidelines 2020
Total open space	1.8 hectares per 1,000 people	North Sydney Local Infrastructure Contributions Plan 2020
Local open space larger than 0.15 hectares in high-density areas	Accessible within 200 metres	Government Architect New South Wales Draft Greener Places Design Guide Issue no. 04 – 2020
Local open space larger than 0.3 hectares	Accessible within 400 metres	Government Architect New South Wales Draft Greener Places Design Guide Issue no. 04 – 2020

