

29 February 2016

Ann-Maree Carruthers
Director, Urban Renewal
Department of Planning & Environment
GPO Box 39
SYDNEY NSW 2001

Dear Ms Carruthers,

Showground Station Precinct Proposal – Submission on behalf of Carrington Road Landowners

We have prepared this submission in response to the exhibition of the draft Showground Station Precinct Proposal (draft Precinct Proposal) on behalf of the owners of a number of properties (hereafter referred to as the 'Carrington Road landowners') located within the central area of the Showground Station Precinct. These properties include Nos 7, 9, 11, 13, 40-42 and 44 Carrington Road, Castle Hill (the site).

These properties, together with 46-48 Carrington Road include all of the land parcels proposed to be zoned B6 Enterprise Corridor. The owners of 46-48 Carrington Road have elected to make a separate submission to the Department. However, the matters raised in this submission are consistent with the views of the landowner of 46-48 Carrington Road.

Summary of Submission

The Carrington Road landowners support the vision for the planned redevelopment of the Precinct to contain a mix of employment and housing in a location well serviced by public transport. The Carrington Road landowners support the draft Precinct Proposal subject to the following clarifications and amendments:

1. That the range of permissible land uses in the proposed B6 Enterprise Corridor zone be expanded to include both retail premises and shop top housing or, that an alternate zone be applied to the land, such as B4 Mixed Use, which permits a mix of commercial, retail and residential land uses.
2. That the depth of the B6 Enterprise Corridor (or alternate B4 Mixed Use) zone along the Carrington Road frontage be reduced to a maximum of 50 metres on each side.
3. That a minimum floor space ratio (FSR) of 3:1 be applied across the both the B6 Enterprise Corridor (or B4 Mixed Use) and R1 General Residential zones.
4. That the proposed road network and ecological corridor be reviewed to provide a more balanced layout based further site investigations.

We request the opportunity to meet with the Department to discuss this submission in detail.

Background

The properties included in this submission include Nos 7, 9, 11, 13, 40-42 and 44 Carrington Road, Castle Hill. These properties are located in the centre of the Showground Station Precinct, and all fall within 400m of the proposed train station, and have a significant combined area of 10.3 hectares. The location, details, ownership and areas of the included properties can be found in **Figure 1** and **Table 1** below.

Existing development on the site comprises warehouse, bulky goods and commercial office buildings, ranging between one and three storeys in height. Many of the buildings are circa 30 years old and nearing the end of their economic life.

The exhibited draft Showground Station Precinct Proposal properly recognises the strategic importance of this precinct and establishes a positive framework to drive the much needed investment and uplift of this area. In regard to the subject site, the exhibited document specifically proposes the following:

- Inclusion of the site partly in a B6 Business Enterprise Zone and R1 General Residential Zone.
- Building height of 27 metres (approximately 6-8 storeys).
- Floor space ratio of 2.3:1.

FIGURE 1 – SHOWGROUND STATION STRUCTURE PLAN (SITE OUTLINED IN RED)

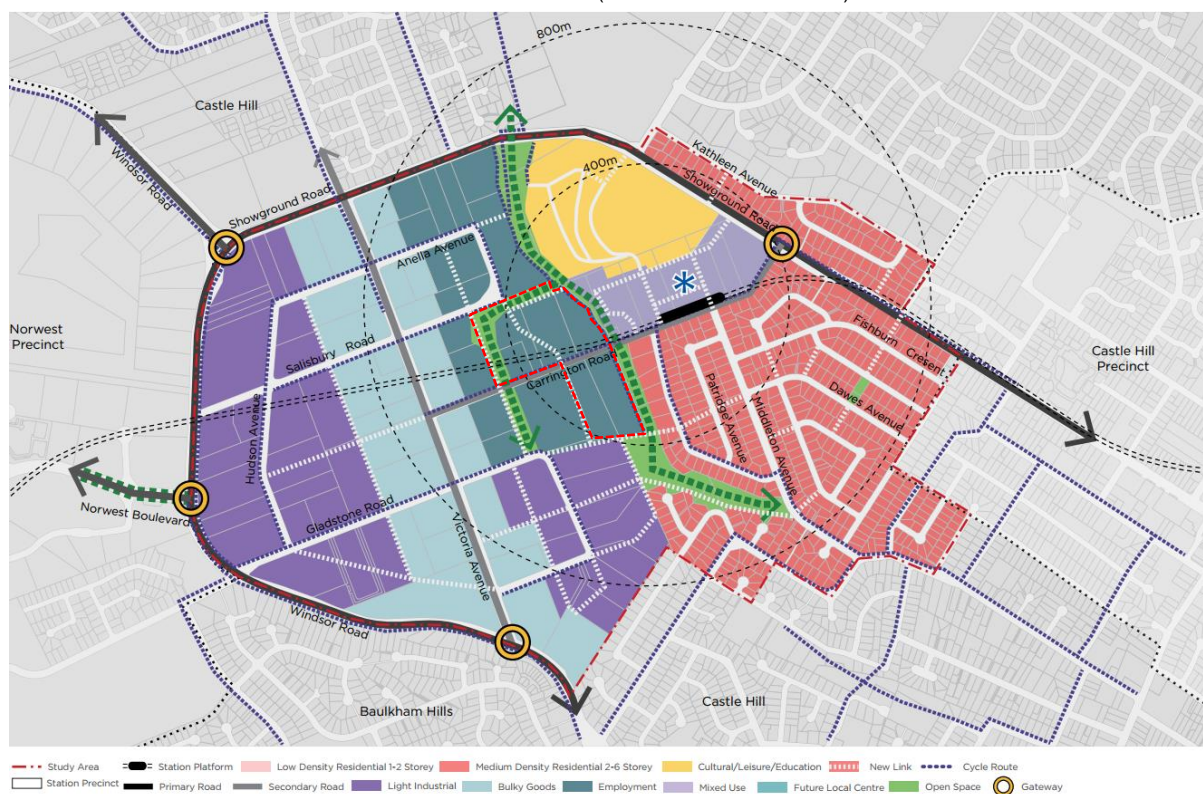


TABLE 1 – PROPERTIES INCLUDED IN THE SITE

PROPERTY ADDRESS	TITLE	OWNER	AREA
7 Carrington Road, Castle Hill	SP 19470	Multiple owners	1.49ha
9 Carrington Road, Castle Hill	Lot B / DP 327274	Parker Hannifin (Australia) Pty Ltd	2.28ha
11 Carrington Road, Castle Hill	Lot 2 / DP 505589	Unistat Pty Ltd	2.02ha
13 Carrington Road, Castle Hill	SP 21054	Mark Fitzgerald Holdings Pty Ltd	1.00ha
40-42 Carrington Road, Castle Hill	Lot 4 / DP 227136	Kingsmede NWI Pty Ltd & Castle Hill Investment Holdings Pty Ltd	2.02ha
44 Carrington Road, Castle Hill	Lot 3 / DP 227136	Uni-Fact Pty Ltd	1.49ha
TOTAL			10.3ha

Economic Analysis

Independent commercial analysis by JLL exhibited with the draft Precinct Proposal documentation calls into question the potential to support large-scale commercial development within the Castle Hill Trading Zone. Urbis' own analysis supports this view, and we consider that there are more tangible economic benefits that could be achieved through mixed-use redevelopment.

This section provides context to the basis of this submission as we believe that the proposed zoning, FSR and building height controls do not reflect the current and future demands in the area, or appropriately reflect the significant investment made by the NSW Government in delivering transport to the precinct and north western Sydney .

LACK OF SUITABILITY FOR LARGE SCALE COMMERCIAL DEVELOPMENT

There are a number of significant impediments to the investment in and demand for large-scale commercial office development within Castle Hill Trading Zone. These impediments, highlighted in the JLL report, include:

- *Lack of recognition of being an investment grade office precinct*
- *Lack of clustering of similar and associated office occupiers*
- *“Confused” offering i.e. along similar lines to the challenges of developing office product in Chatswood, St Leonards, Sydney Fringe etc.*
- *Immediate proximity to high quality alternative office destination (Norwest).*

Unlike Norwest, the Castle Hill Trading Zone is not an established location for large scale commercial office floorspace. The current nature of employment uses within the Precinct is dominated by bulky goods outlets, car showrooms and a mix of small and medium scale light industrial and commercial tenancies. An assessment of the relative strengths of Castle Hill Trading Zone and Norwest is provided in **Appendix A**.

Only around 1,900 of the 6,800 existing jobs within the precinct (28% of the total) are in sectors that are typically 'office based' (refer to **Appendix B**). These are most commonly found in small strata

office suites. Discussions with local commercial real estate agents highlight there is a high volume of vacant commercial floorspace within the Castle Hill Trading Zone, highlighting the lack of demand for office floorspace in the area at present.

Consistent with the Economic Feasibility Report undertaken by JLL, it is our view that it is unlikely that there will be demand for large-scale commercial development within the Castle Hill Trading Zone. The precinct performs poorly against key success factors for commercial office development, including:

- Track record as an established commercial hub.
- Provision of services and amenities.
- Competition from existing and proposed supply.

It would therefore require a fundamental repositioning in the market and major capital investment to establish the precinct as a sustainable office market location.

COMPETITIVE IMPACT OF ESTABLISHED OFFICE PRECINCTS

The potential long term demand for commercial office floorspace cannot be viewed in isolation from the broader supply in the Sydney office market, where changes in the supply pipeline in core office locations have implications for suburban locations such as Norwest and the broader Hills Shire.

There is currently a significant amount of commercial floorspace in the development pipeline within metropolitan Sydney (in excess of one million sqm). There is a large amount of commercial floorspace within mixed use developments, including around 320,000 sqm additional commercial floorspace being developed in Sydney CBD as part of the Barangaroo development. The Barangaroo development in particular is expected to have a metropolitan wide impact on the commercial office market, as major tenants seek out opportunities to locate in higher quality stock.

The additional supply of office stock across metropolitan Sydney is expected to:

1. Place downward pressure on office market rents, particularly for suburban office market locations; and
2. Place upward pressure on vacancy rates, particularly for suburban office market locations.

In the face of declining rents and higher vacancies, high quality office space becomes more affordable, in turn increasing the competitive environment of the commercial market. The importance of location therefore becomes a critical demand factor for those tenants seeking commercial space. Already established suburban/fringe commercial markets, such as Norwest, Crows Nest / St Leonards, and Chatswood, become inferior office locations relative to prime (and increasingly affordable) CBD locations. This is reflected in the relatively higher vacancy rates exhibited in these suburban/fringe locations.

Castle Hill Trading Zone is untested as a major commercial office location, and although the precinct's accessibility will be improved by the Sydney Metro North (i.e. Showground train station), the factors listed previously all contribute to it being a sub-optimal location for major commercial office development.

ROLE OF NORWEST

In contrast, Norwest is well positioned to be the focus for commercial development within The Hills Shire LGA moving forward. Norwest holds a greater competitive advantage than the Showground Precinct and will be significantly strengthened by the addition of new train stations at Norwest and Bella Vista.

Norwest has grown into a full service, self-sufficient employment precinct and features recreational areas with walking tracks and water features, two shopping centres (one sub-regional), restaurants and cafes, child care centres and hotels.

The following factors that will positively influence the future demand for office space at Norwest:

- The addition of the Norwest and Bella Vista train stations.
- Good access to road infrastructure, proximity to suppliers and buyers, car parking, and public transport.
- Affordability (low rent prices).
- Areas of greenfield will continue to provide flexibility to accommodate a range of users.
- Population growth in the north-west sector.
- The Norwest Structure Plan and the draft Bella Vista Structure Plan (both prepared by NSW Government) collectively identify the potential for an additional 23,000 commercial jobs in the precinct.
- Urbis' analysis of office job growth projections for The Hills Shire LGA indicates that around 40% of jobs growth between 2016 to 2036 will be in sectors that require a high proportion of commercial office floorspace.

In view of the capacity for additional jobs growth around Norwest and the time and financial investment over many years to establish Norwest, our view is that strategic planning should focus commercial jobs growth at Norwest as well as at the major centres in the Castle Hill and Rouse Hill Precincts.

Recommended Amendments to the Draft Precinct Proposal

The Carrington Road landowners support the vision for the planned redevelopment of the precinct to contain a mix of employment and housing in a location well serviced by public transport. The Carrington Road landowners support the draft Precinct Proposal subject to the following:

1. That the range of permissible land uses in the proposed B6 Enterprise Corridor zone be expanded to include both retail premises and shop top housing or, alternatively, this part of the site be zoned B4 Mixed Use in which commercial, retail and residential land uses are permitted.
2. That the depth of the B6 Enterprise Corridor (or B4 Mixed Use) zone along the Carrington Road frontage be reduced to a maximum of 50 metres on each side.
3. That a minimum Floor Space Ratio (FSR) of 3:1 be applied across the both the B6 Enterprise Corridor (or B4 Mixed Use) and R1 General Residential zones.
4. That the road network be reviewed at the detailed design stage so to provide a more appropriate layout.

Each of these matters is addressed in further details in the following sections.

PROPOSED B6 ENTERPRISE CORRIDOR ZONE

The draft Precinct Proposal specifies that the B6 Enterprise Corridor zoning will apply to land within the Carrington Road Sub-precinct. While the B6 zoning under *The Hills Shire Local Environmental Plan 2012* (LEP) permits shop top housing, the draft Precinct Proposal identifies that this use would be excluded from the zone.

Comprehensive market research prepared by Urbis (on behalf of the landowners) and JLL (on behalf of the Department) identifies that Carrington Road is not attractive for large floor plate commercial office tenants. This finding is also backed up by a lack of interest in leasing existing commercial space in recent years.

The provision of such a large land area along the Carrington Road frontage, for primarily commercial office development, is unrealistic and is likely to contribute to this important area not being redeveloped as desired in the precinct plan.

Accordingly, we submit that the approach to this zoning must be reviewed in detail to ensure suitable planning controls are established that facilitates desired development in accordance with the precinct plan. We believe a preferred outcome can be achieved by two approaches being:

1. That the B6 Enterprise Corridor zone be applied but with the range of permissible land uses expanded to include both retail premises and shop top housing; or alternatively
2. That a B4 Mixed Use zone be applied in which commercial, retail and residential land uses are permitted.

Either of these approaches will align with the indicated aim of the area to '*encourage additional employment and business opportunities by allowing a broader range of commercial uses*'. Permitting this broader range of land uses is considered critical to ensure that a vibrant, mix of employment activities is developed along Carrington Road.

In addition to employment uses, we submit that the inclusion of residential development, in the form of shop top housing, is vital to maximise the NSW Government's return of investment for properties within close proximity to the new train station. The inclusion of residential uses will aid in enabling future developments to be economically viable, and future employment uses will be strengthened by an increased customer base.

We submit that appropriate detailed planning controls can be established for the corridor fronting Carrington Road which ensure that appropriate 'minimum' areas of non-residential development is delivered despite the broadening of the land use mix. The provision of a possible 'minimum' FSR provision for non-residential development in either the B6 or B4 zone, supplemented by more detailed Development Control Plan (DCP) provisions, will contribute to a far more effective long term outcome than the current proposed approach.

EXTENT OF THE B6 ENTERPRISE CORRIDOR ZONE

The exhibited plan indicates that the proposed B6 Enterprise Corridor zone would extend to a distance of approximately 90-100 metres on each side of Carrington Road. The extent of B6 zone is considered excessive and should be reduced.

This is supported by the economic report prepared by JLL for the Department, which identifies the significant limitations around the nature and scale of employment generating land uses that are considered to be feasible at this location.

Impediments to large-scale employment generating land uses include:

- The area is not considered to be attractive to investment-grade commercial office uses now or into the future, and will not attract a 'clustering' of commercial office occupiers or uses.
- Commercial office users represent a small portion of current operations in this area with increasing vacancies as commercial office tenants relocate to preferred locations.
- There are far more attractive and high quality alternative office destinations in the surrounding region, including Norwest. Norwest is well positioned to be the focus for commercial development within The Hills Shire LGA moving forward. Norwest holds a greater competitive advantage than the Showground Precinct and will be significantly strengthened by the addition of new train stations at Norwest and Bella Vista.

We submit that the extent of the proposed B6 zoned land is excessive for the future needs in this location and should be reduced. However, in recognition of the desire to achieve mixed use development, we submit that the proposed B6 zone be retained but reduced in depth to 40 to 50 metres.

A depth of 40 to 50 metres for the B6 zone will provide a more efficient use of land and scale of non-residential development suited to this locality. This depth will allow adequate front and rear setbacks and a building depth dimension of 25 to 35 metres, which will accommodate the type of commercial, retail and other non-residential development likely to be attracted to this location.

The proposed approach to reducing the extent of the B6 zone is illustrated in **Figure 2** below.

FIGURE 2 – ZONE DEPTHS



CURRENT PROPOSAL (90-100M DEPTH)



REVISED PROPOSAL (40-50M DEPTH)

INCREASE FLOOR SPACE RATIO

We submit that the proposed FSR for both the B6 and R1 zones in this precinct should be a minimum of 3:1.

The proposed FSR of 2.3:1 does not appropriately reflect the site's proximity to the new train station and the investment made by the NSW Government. Increasing the FSR to a minimum of 3:1 would align with the Department's aim to provide housing close to the train station and would result in a suitable scale of development, remaining consistent with the Precinct being centred around the train station. Appropriate provisions in the DCP will ensure that a suitable built form outcome is delivered. An FSR of 3:1 for the site which is located between 160 and 400 metres from the train station is consistent with the proposed FSRs for land located an equivalent distance to the east of the train

station and significantly less than the land adjacent and separated from the site by an open space corridor having an FSR of 5:1.

The increase in FSR would also facilitate the more timely redevelopment of the locality with the larger land holdings not presenting a barrier as may be faced on land to the south of the site which is in more fragmented ownership.

The draft Structure Plan seeks to implement a new road network and the location of these roads will impact some lots to a greater extent than others. In this context we believe that the FSR calculations should be calculated based on the total site area including land nominated for future roads or other corridors. This will provide an equitable outcome for all sites within the precinct

In addition to the increase in FSR, we submit that the 40 metre/12 storey height corridor along Carrington Road could be extended to the west of Cattai Creek as it would establish a suitable built form along Carrington Road and further maximise the limited land within close proximity to the train station. The proposed increases in height and FSR would deliver a more balanced urban design outcome for the precinct.

AMENDMENTS TO THE PROPOSED ROAD LAYOUT

The ecological assessment prepared by Eco Logical Australia identifies an area of Shale Sandstone Transition Forest to the south-east of Salisbury Road. This area has been retained in the draft Structure Plan and expanded into adjacent areas to form a continuous corridor.

The ecological assessment identifies that the vegetation patch has not been field validated and that it is unlikely that it would meet the *Environment Protection and Biodiversity Conservation Act 1999* listing definition due to the condition criteria required under that Act and the current land use within the Precinct.

Accordingly, we submit that further investigation should be undertaken to verify the quality of the vegetation as its retention will impact on the road layout and economic viability of the site and the Precinct.

We submit that the future road alignments should have the flexibility to accommodate:

- Potential land consolidations;
- Amendments to the width of the B6 (or B4) zoned land;
- A more orthogonal and regular road layout;
- Topographical levels;
- Equitable distribution between parcels;
- Appropriate sight lines along Carrington Road; and
- Maintain frontages to the Cattai Creek corridor.

Rather than setting the road pattern at this stage it is submitted that the road layout required further detailed design which is necessary to ensure that suitably sized land parcels can be created in the future, safe sight lines can be created and traffic safety enhanced.

Summary

The Carrington Road generally support the aims of the draft proposal however our submission has tested the economic viability of the proposed quantum of non-residential areas under the draft proposal, which leads to planning and urban design implications for the Precinct.

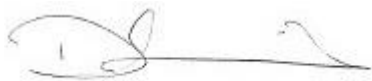
We are seeking amendments to the draft proposal as follows:

1. That the range of permissible land uses in the proposed B6 Enterprise Corridor zone be expanded to include both retail premises and shop top housing or, alternatively, this part of the site be zoned B4 Mixed Use in which commercial, retail and residential land uses are permitted.
2. That the depth of the B6 Enterprise Corridor (or alternate B4 Mixed Use) zone along the Carrington Road frontage be reduced to a maximum of 50 metres on each side.
3. That a minimum FSR of 3:1 be applied across the both the B6 Enterprise Corridor (or B4 Mixed Use) and R1 General Residential zones.
4. That the road and open space network be reviewed having regard to site characteristics and cadastral boundaries.

We request the opportunity to meet with the Department to discuss the matters raised in this submission and to work collaboratively with the Department to achieve a better urban outcome for the area and maximise the significant investment of Sydney Metro Northwest.

Please contact me should you have any questions.

Sincerely,



David Lousick
Senior Consultant

Appendix A – Success Factors for Commercial Office Development: Castle Hill Trading Zone and Norwest Business Park

CASTLE HILL TRADING ZONE

FACTOR	COMMENT	SHOWGROUND PRECINCT	RATING
Access to transport infrastructure	Access to efficient public transport and road networks, particularly links to the CBD, airport and other major employment centres are important to potential tenants and employees	<ul style="list-style-type: none"> Limited connectivity at present. Road connections to Sydney CBD take around 35 minutes in moderate traffic and around 50 minutes to the airport. This compares to 20 minutes to Sydney CBD and 35 minutes to the airport for workers at Macquarie Park The new Showground Metro station will be located within 400 metres of the Carrington Road precinct which will significantly improve public transport connectivity – north to Norwest, Rouse Hill and the North West Growth Centre and south to Chatswood with connections to Macquarie Park, North Sydney and Sydney CBD 	Moderate
Access to workers	Commercial tenants consider where workers live in choosing an office location.	<ul style="list-style-type: none"> A large and growing population in Sydney's North West region provides a large employment pool for potential office tenants Potential to increase the resident worker population around the Showground station can assist with local labour market retention 	Moderate
Established commercial office hub	Large scale commercial tenants look for established commercial areas where there is a clustering of other reputable companies.	<ul style="list-style-type: none"> The precinct is not part of a recognised / established commercial office market, therefore limiting its potential to attract major commercial tenants 	Weak

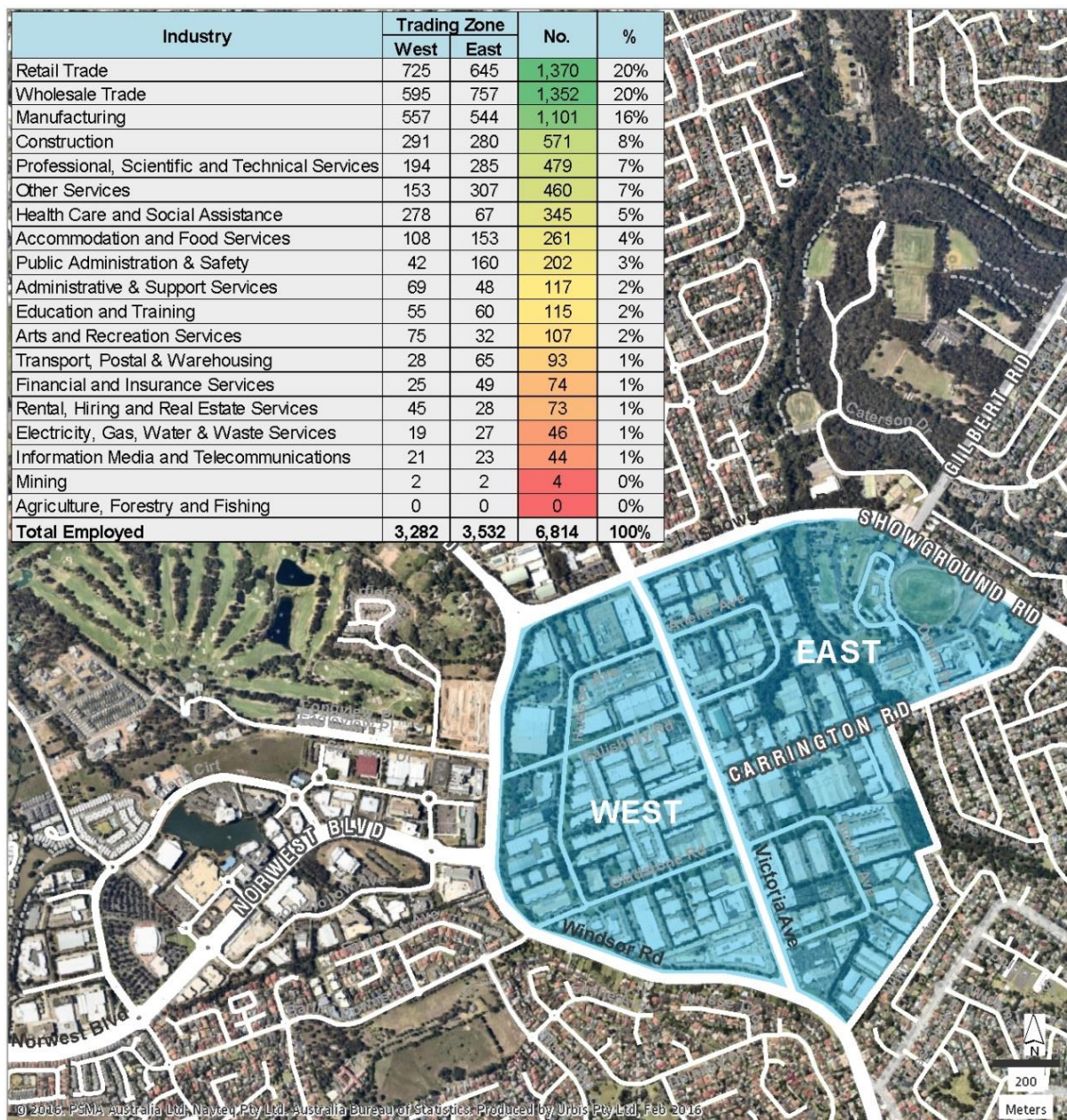
Services and amenities	Locations that have easy access to retail and other amenities will be highly sought after as office locations.	<ul style="list-style-type: none"> ▪ Currently limited services and amenities provided around the subject site ▪ The Showground station development will provide local-scale retail and service activity which will improve local service provision 	Weak
Competing supply	<p>Competing commercial space provide an indication of market preferences in terms of location and product.</p> <p>The quantum of better located supply can limit the market potential to support commercial uses on the subject site.</p>	<ul style="list-style-type: none"> ▪ There are a number of superior located commercial precincts elsewhere within Sydney ▪ Norwest is an established commercial centre within the Hills Shire LGA currently accommodating around 20,000 employees. Norwest has the potential to add 15,000-23,000 jobs ▪ Beyond Norwest, a significant supply of additional commercial floorspace is planned in existing commercial nodes in Metropolitan Sydney including over 320,000 sq.m of A-grade net leasable office floorspace at Barangaroo in Sydney CBD, together with additional developments at Sydney Olympic Park, Parramatta CBD, Macquarie Park (North Ryde) and North Sydney. This supply pipeline is expected to place downward pressure on rents and vacancy rates, providing greater opportunities for businesses to relocate closer to Sydney CBD. ▪ Outer metropolitan locations such as The Hills Shire are geographically disadvantaged, particularly as the Sydney Metro North West will increase accessibility to these competing locations ▪ Overall this limits the market potential for commercial development in untested locations such as the subject site, particularly in the short-medium term. 	Weak

NORWEST

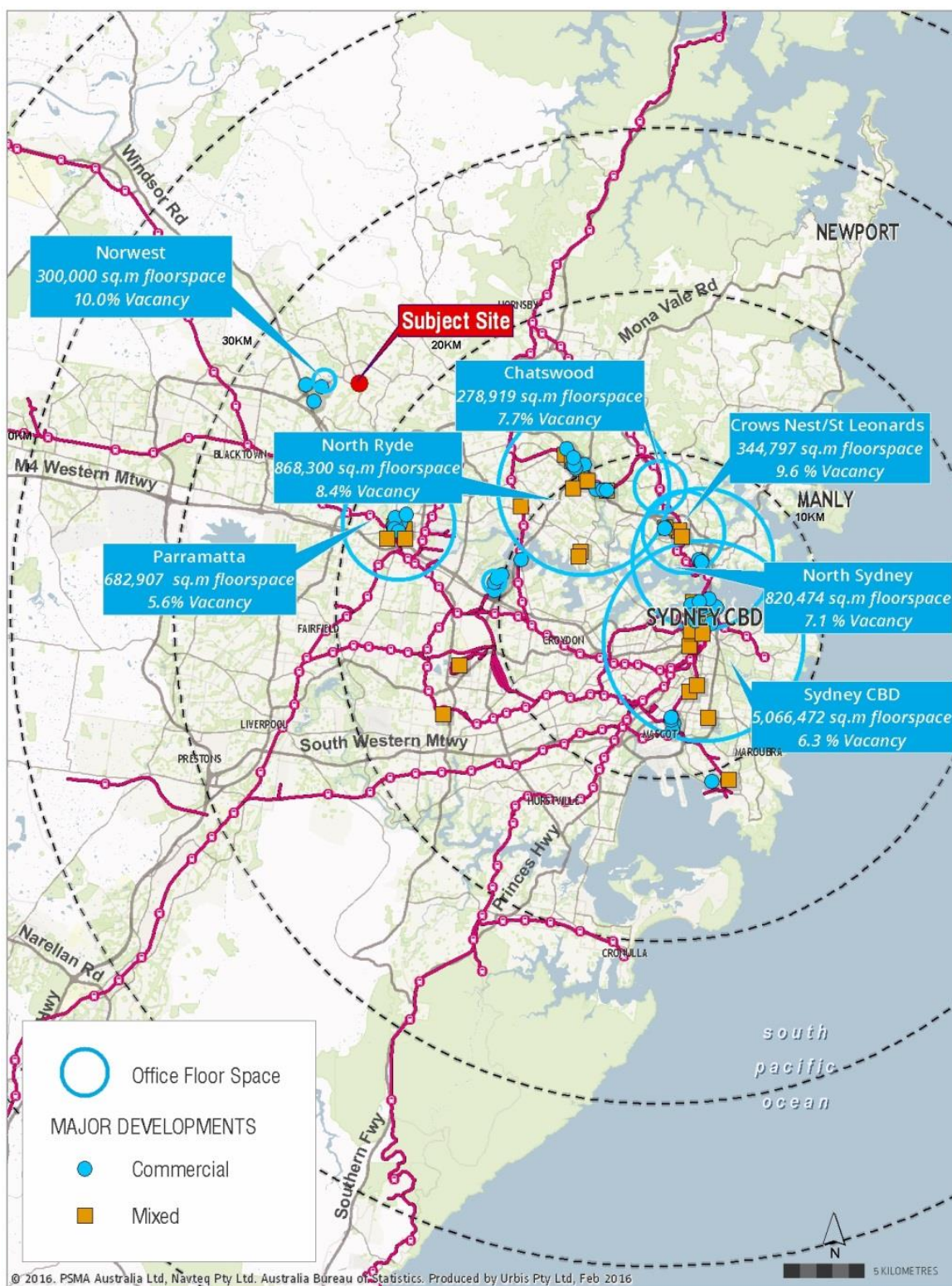
FACTOR	COMMENT	NORWEST	RATING
Access to transport infrastructure	Access to efficient public transport and road networks, particularly links to the CBD, airport and other major employment centres are important to potential tenants and employees	<ul style="list-style-type: none"> Will be served by two metro stations (Bella Vista and Norwest) when the Sydney Metro Northwest opens in 2019. Easy road access to the M7 motorway 	High
Access to workers	Commercial tenants consider where workers live in choosing an office location.	<ul style="list-style-type: none"> Easily accessibility to the growing population in Sydney's North West region provides a large employment pool for potential office tenants Accessibility will be enhanced by the opening of the two new stations 	High
Established commercial office hub	Large scale commercial tenants look for established commercial areas where there is a clustering of other reputable companies.	<ul style="list-style-type: none"> Norwest is North Western Sydney's largest employment centre, with around 20,000 employees, 800 businesses and 500,000 sq.m of occupied space, of which around 300,000 sq.m is office space Woolworths, Resmed, and Wyeth Australia all constructed major head office style facilities at Norwest in the early 2000's. Norwest is an established commercial centre within the Hills Shire LGA currently accommodating around 20,000 employees. Norwest has the potential to add 15,000-23,000 jobs 	High

Services and amenities	Locations that have easy access to retail and other amenities will be highly sought after as office locations.	<ul style="list-style-type: none"> Norwest has grown into a full service, self-sufficient employment precinct and features recreational areas with walking tracks and water features, two shopping centres (one sub-regional), restaurants and cafes, child care centres and hotels 	High
Competing supply	<p>Competing commercial space provide an indication of market preferences in terms of location and product.</p> <p>The quantum of better located supply can limit the market potential to support commercial uses on the subject site.</p>	<ul style="list-style-type: none"> If Norwest is maintained as the primary commercial office location for the Hills Shire LGA, its outlook should be positive, benefiting from the Sydney Metro North West and population growth within the North West Growth Centre Although Norwest is not centrally located, its competitive positioning lies in a combination of: <ul style="list-style-type: none"> Excellent public transport accessibility Affordability (low rent prices) Availability of land for further expansion 	

Appendix B – Castle Hill Trading Zone Employment Profile



Appendix C – Sydney Commercial Office Markets



Appendix D – Projected Jobs by Industry: The Hills Shire LGA 2016 to 2036

Industry Sector	2016		2021		2026		2031		2036		2016-36		
	No.	%	No.	%	No.	%	No.	%	No.	%	Total Change	Annual Growth %	Annual Growth (No.)
Retail Trade	16,650	20%	20,531	20%	22,998	20%	25,688	19%	28,340	19%	11,690	2.7%	585
Professional, Scientific & Technical Services	8,250	10%	12,532	12%	14,246	12%	16,205	12%	18,474	13%	10,224	4.1%	511
Health Care & Social Assistance	8,110	10%	10,055	10%	11,506	10%	13,054	10%	14,440	10%	6,330	0.0%	317
Accommodation & Food Services	4,784	6%	5,984	6%	7,095	6%	8,366	6%	9,546	6%	4,762	3.5%	238
Education & Training	6,802	8%	8,132	8%	9,224	8%	10,411	8%	11,288	8%	4,486	2.6%	224
Construction	6,625	8%	7,691	7%	8,367	7%	9,271	7%	10,069	7%	3,444	2.1%	172
Administrative & Support Services	2,210	3%	3,093	3%	3,852	3%	4,540	3%	5,142	3%	2,932	4.3%	147
Public Administration & Safety	1,977	2%	2,882	3%	3,497	3%	4,225	3%	4,799	3%	2,822	4.5%	141
Financial & Insurance Services	3,005	4%	3,743	4%	4,365	4%	5,077	4%	5,782	4%	2,777	3.3%	139
Other Services	3,562	4%	4,497	4%	5,052	4%	5,799	4%	6,283	4%	2,721	2.9%	136
Wholesale Trade	5,145	6%	5,903	6%	6,167	5%	7,051	5%	7,436	5%	2,291	1.9%	115
Information Media & Telecommunications	1,307	2%	1,947	2%	2,530	2%	2,974	2%	3,332	2%	2,025	4.8%	101
Manufacturing	6,433	8%	7,140	7%	7,519	6%	8,049	6%	8,422	6%	1,989	1.4%	99
Rental, Hiring & Real Estate Services	1,556	2%	2,191	2%	2,548	2%	3,047	2%	3,353	2%	1,797	3.9%	90
Arts & Recreation Services	1,185	1%	1,822	2%	2,131	2%	2,643	2%	2,947	2%	1,762	4.7%	88
Transport, Postal & Warehousing	1,235	2%	1,808	2%	2,021	2%	2,690	2%	2,890	2%	1,655	4.3%	83
Unclassified	1,899	2%	2,257	2%	2,448	2%	2,784	2%	2,946	2%	1,047	2.2%	52
Electricity, Gas, Water & Waste Services	377	0%	521	1%	563	0%	800	1%	841	1%	464	4.1%	23
Agriculture, Forestry & Fishing	581	1%	588	1%	599	1%	612	0%	625	0%	44	0.4%	2
Mining	77	0%	87	0%	94	0%	102	0%	111	0%	34	1.8%	2
Total Employment	81,770	100%	103,404	100%	116,822	100%	133,388	100%	147,066	100%	65,296	3.0%	3,265

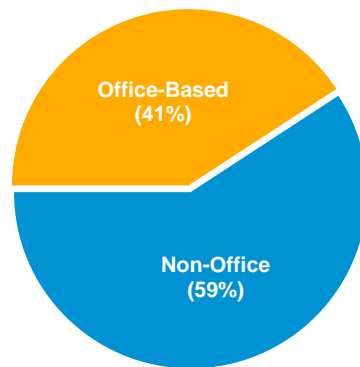
Source: BTS 2014 Release; Urbis

Appendix E – Jobs Growth by Industry Graphs

Hills Shire Job Growth Projections 2016-36

OFFICE VS NON-OFFICE BASED EMPLOYMENT ESTIMATE

CHART 1

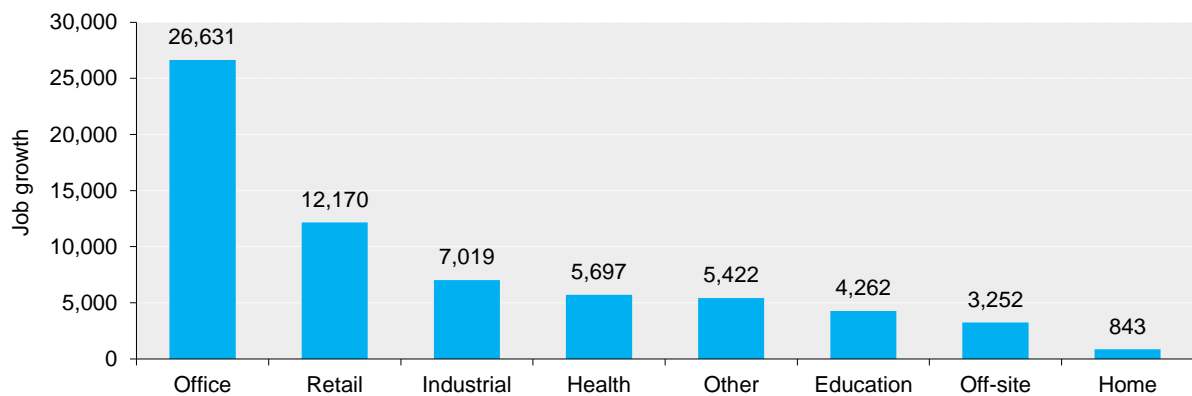


Source : BTS Journey to Work 2011 ; Urbis

Hills Shire Job Growth Projections 2016-36

EMPLOYMENT PROJECTIONS BY KEY PROPERTY TYPE

CHART 2



Source: BTS 2014 Release; Urbis