

**ETHOS
URBAN**



Manly Place Plan

Project Working Group
Meeting 1

September 2021



Welcome

Agenda

1. Welcome and introductions
2. Acknowledging Manly as a special place
3. Background to the project
4. What we are seeking to achieve
5. Our process
6. What the baseline evidence base has suggested so far
7. Focus on economy
8. Starting to bring this together
9. Facilitated Q & A
10. Where to from here



Introductions



Project direction
and management



Planning

Design

Social

Engagement



Movement



Economics



Night-time economy



**Acknowledging Manly as a
special place**

Manly as a special place

- Aboriginal cultural significance
- Complex, multi-functional centre that is highly valued by the Northern Beaches community
- World-famous Manly ocean beach
- A diverse range of cultural, tourist, retail and entertainment uses
- A residential and economic hub
- An agglomeration of arts and cultural facilities including the Manly Art Gallery and Museum
- A designated late-night precinct
- A mix of higher order health and wellbeing facilities



Manly as a special place





Background to the project


A complex and evolving planning landscape



Future direction

- Strengthen Manly's role as a Strategic Centre
- Encourage a vibrant and diverse cultural, tourism, retail and entertainment precinct
- Promote a more diverse commercial offering
- Further job self-containment to support local economic growth.
- Improve public transport connections
- Design excellence and creative expression throughout the public domain





**What we are
seeking to achieve**

What we now need to do

- Review and integrate these plans and apply them to Manly in a way that is tailored to its unique character
- Respect existing decisions and build on the wealth of existing information and community input
- Provide a clear vision supported by the community and guidance on core matters
- Make recommendations for land use and development outcomes
- Identify development principles and collaborate with Council to prepare the draft Manly Place Plan Framework



What are core matters

- Natural environment
- Movement
- Parks and open spaces
- Public domain
- Social infrastructure
- Land use
- Buildings and their design
- Economy
- Night-time economy



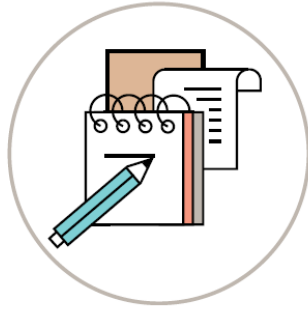


Our process

Workstreams



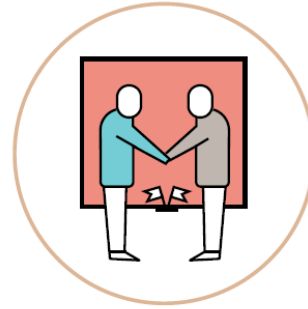
PLANNING



DESIGN



TECHNICAL



ENGAGEMENT



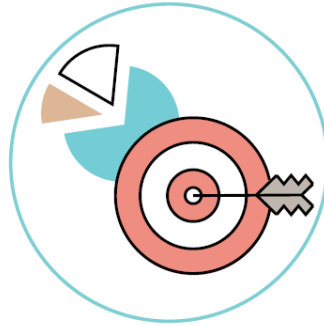
GOVERNANCE

Process



BASELINE EVIDENCE BASE

Technical direction,
issues, opportunities
and constraints.



ASPIRATIONS

Vision and principles.



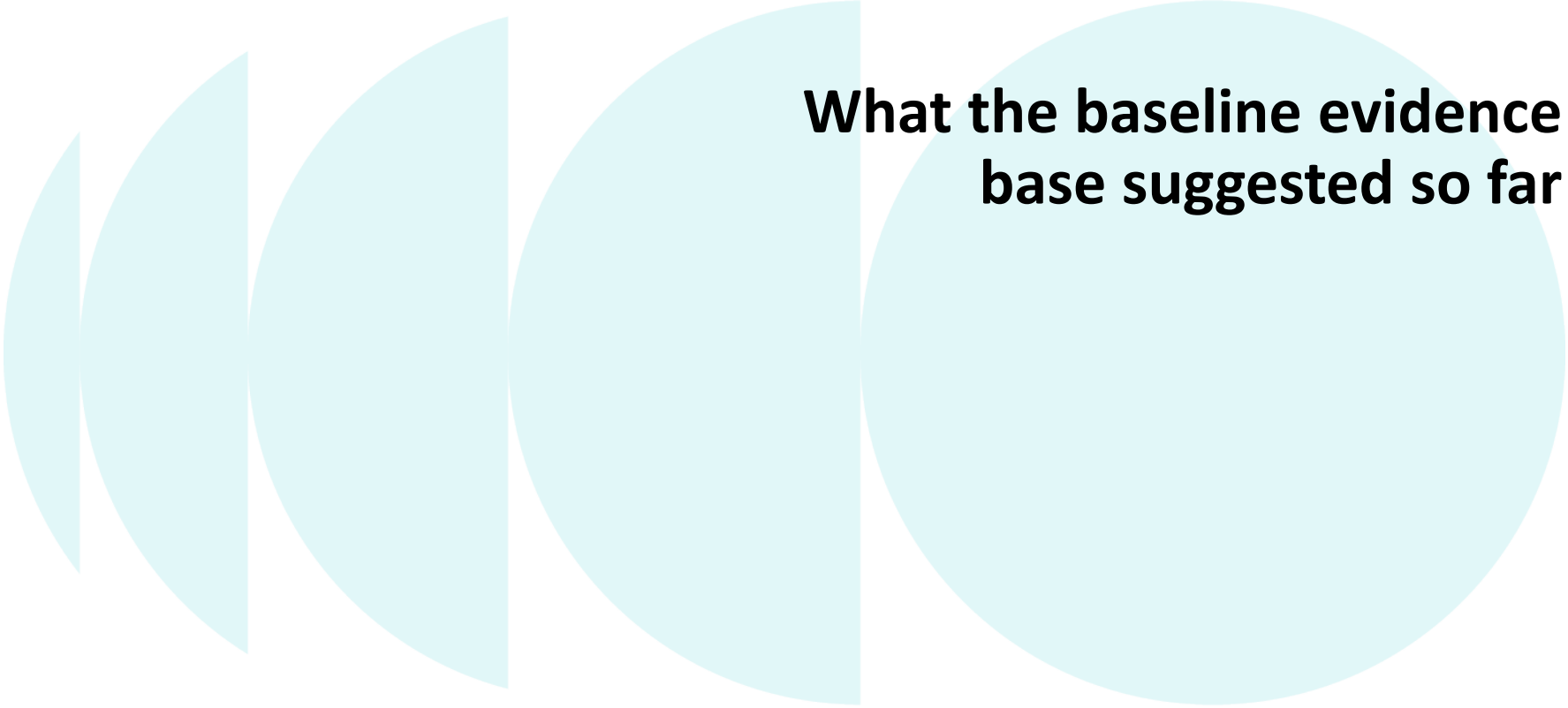
PLACE PLAN FRAMEWORK

Including key principles.



TESTING

Against technical
considerations.



**What the baseline evidence
base suggested so far**

People



3,125
residents



Growing at **2.6%** per
annum on average



**More people born
overseas, in
particular the UK**

People



3,125
residents



Higher proportion of **young workforce** (25-35 years old)



Growing at **2.6%** per annum on average



Higher educated, most people work in **knowledge jobs**



More people born overseas, in particular the UK



Higher income

People



3,125
residents



Higher proportion of **young workforce** (25-35 years old)



Smaller household size



Growing at **2.6%** per annum on average



Higher educated, most people work in **knowledge jobs**



More renters



More people born overseas, in particular the UK



Higher income



Nearly 100% of homes are **units or townhouses**

Natural environment

Observations / Issues

- Unique coastal and environmental setting
- Scenic and culturally significant natural landscapes
- Resilience in the context of its coastal setting, climate change



Natural environment

Observations / Issues

- Unique coastal and environmental setting
- Scenic and culturally significant natural landscapes
- Resilience in the context of its coastal setting, climate change

Opportunities

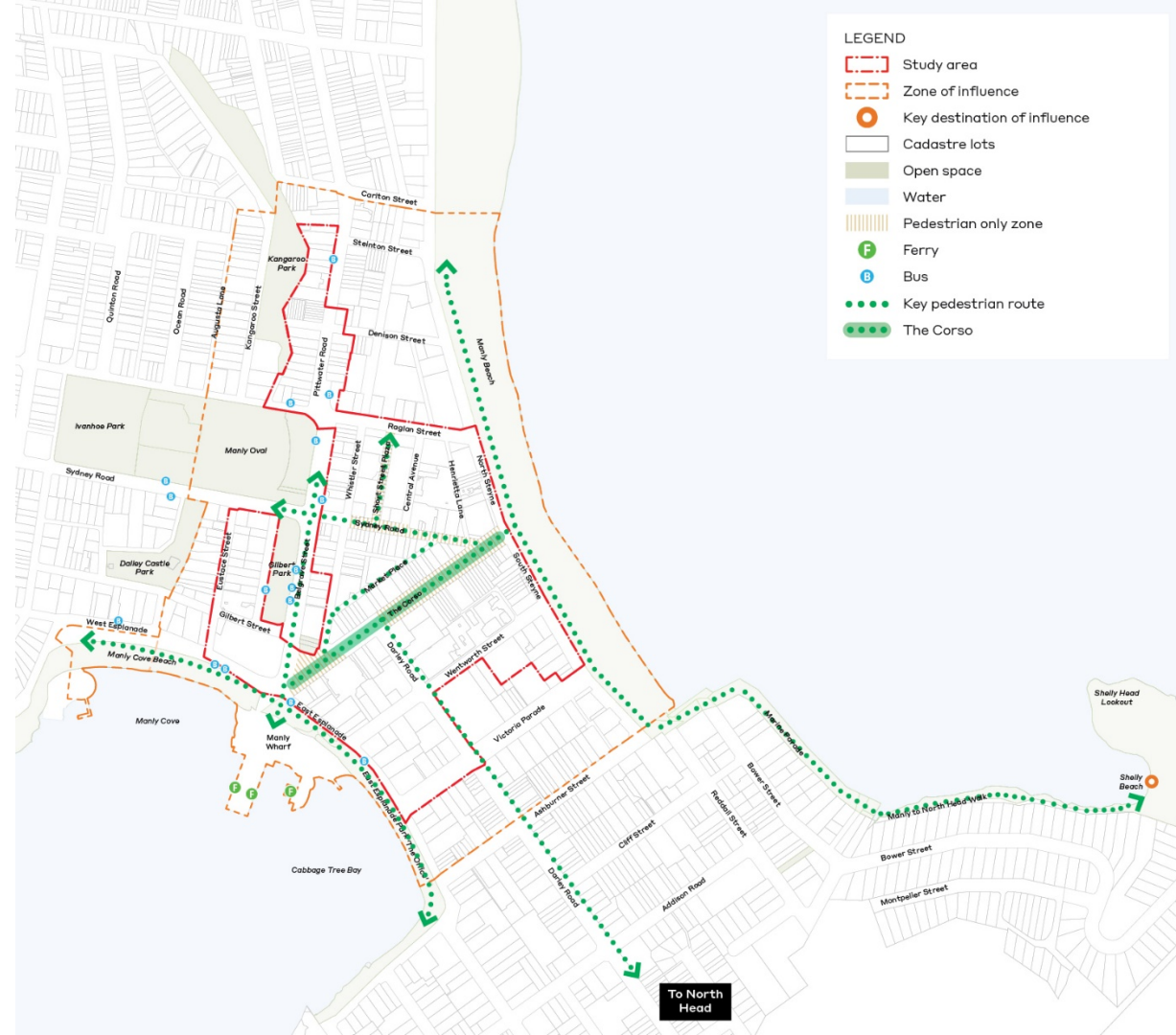
- Explore ways to enhance and protect the natural landscape, coastline, vegetation and open spaces
- Explore resilience measures to plan for places that are adaptable to climate change (urban heat island effect, rising sea level)
- Increase urban tree canopy
- Improved links to North Head and Shelly Beach



Movement

Observations / Issues

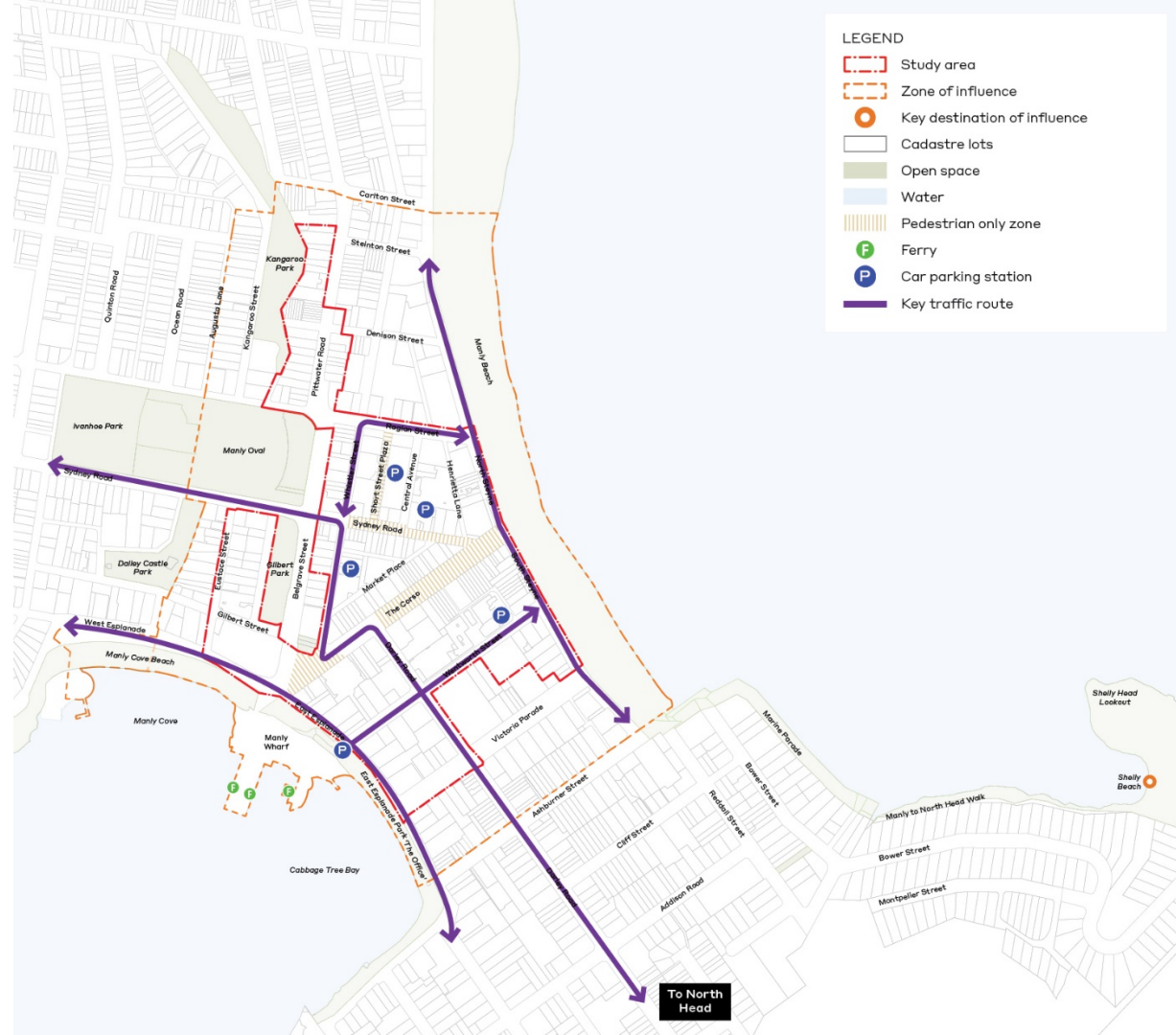
- The Corso is a significant key pedestrian route that connects Manly Wharf to Manly Beach and Shelly Beach via Marine Parade



Movement

Observations / Issues

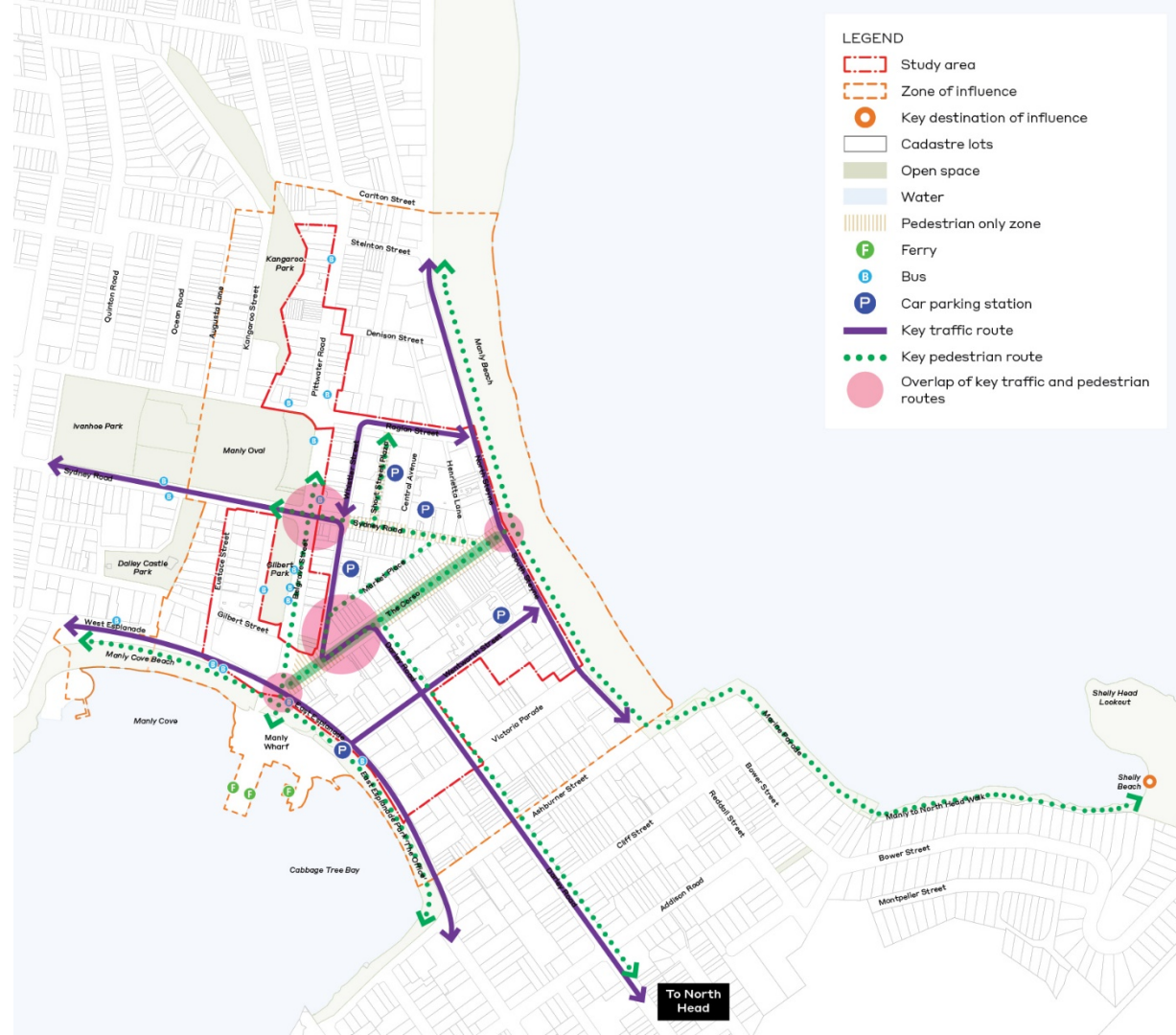
- The Corso is a significant key pedestrian route that connects Manly Wharf to Manly Beach and Shelly Beach via Marine Parade
- Car parks are centrally located in the town centre and can be difficult to access – resulting in high levels of circulating traffic on local streets
- Lack of high frequency road based public transport services increase reliance on private vehicles



Movement

Observations / Issues

- The Corso is a significant key pedestrian route that connects Manly Wharf to Manly Beach and Shelly Beach via Marine Parade
- Car parks are centrally located in the town centre and can be difficult to access – resulting in high levels of circulating traffic on local streets
- Lack of high frequency road based public transport services increase reliance on private vehicles
- Roads act as a barrier to key pedestrian movement corridors



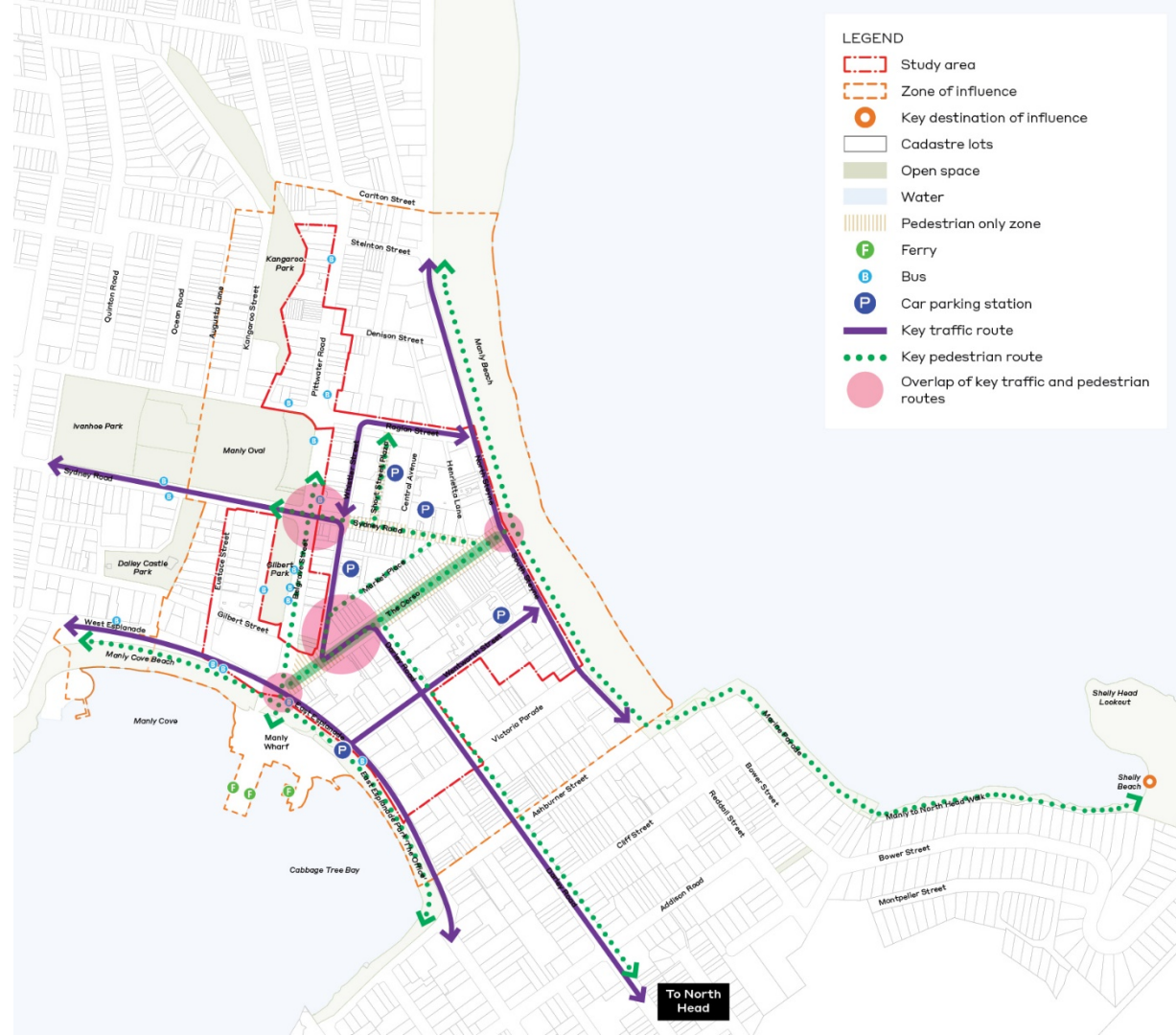
Movement

Observations / Issues

- The Corso is a significant key pedestrian route that connects Manly Wharf to Manly Beach and Shelly Beach via Marine Parade
- Car parks are centrally located in the town centre and can be difficult to access – resulting in high levels of circulating traffic on local streets
- Lack of high frequency road based public transport services increase reliance on private vehicles
- Roads act as a barrier to key pedestrian movement corridors

Opportunities

- Work with TfNSW to improve public transport services to/from Manly
- Potential to extend pedestrianised zones or create new shared zones to reduce extent of traffic circulation in the town centre
- Review access to existing parking facilities to reduce conflicts with key pedestrian movements



Parks and open spaces

Observations / Issues

- Existing parks, beaches and foreshore areas - each have their own function in the context of Manly
- Within proximity to each other, but lacking connectivity



Parks and open spaces

Observations / Issues

- Existing parks, beaches and foreshore areas - each have their own function in the context of Manly
- Within proximity to each other, but lacking connectivity

Opportunities

- Enhance and better connect existing open space network
- Consider the optimisation of open space for recreation, sport and social activity to support social networks and create a sense of community
- Maximise solar access on the beach, harbour and foreshore areas, the Corso, East and West Esplanades



Public domain

Observations / Issues

- Existing block structure is generally permeable and supports walkability within the town centre



Public domain

Observations / Issues

- Existing block structure is generally permeable and supports walkability within the town centre
- Generally prioritises pedestrians with a combination of pedestrian-only zones, shared zones and appropriate footpath widths



Public domain

Observations / Issues

- Existing block structure is generally permeable and supports walkability within the town centre
- Generally prioritises pedestrians with a combination of pedestrian-only zones, shared zones and appropriate footpath widths
- The Corso is a primary pedestrian connection that links Manly Wharf to Manly Beach – not a space to dwell in



Public domain

Observations / Issues

- Existing block structure is generally permeable and supports walkability within the town centre
- Generally prioritises pedestrians with a combination of pedestrian-only zones, shared zones and appropriate footpath widths
- The Corso is a primary pedestrian connection that links Manly Wharf to Manly Beach – not a space to dwell in
- Imbalance in character of the village and lack of a defined centre
- Quieter streets and laneways adjacent to the Corso are where village life takes place
- Limited activation on Whistler Street, Short Street, Central Avenue and Henrietta Lane



Public domain

Observations / Issues

- Existing block structure is generally permeable and supports walkability within the town centre
- Generally prioritises pedestrians with a combination of pedestrian-only zones, shared zones and appropriate footpath widths
- The Corso is a primary pedestrian connection that links Manly Wharf to Manly Beach – not a space to dwell in
- Imbalance in character of the village and lack of a defined centre
- Quieter streets and laneways adjacent to the Corso are where village life takes place
- Limited activation on Whistler Street, Short Street, Central Avenue and Henrietta Lane

Opportunities

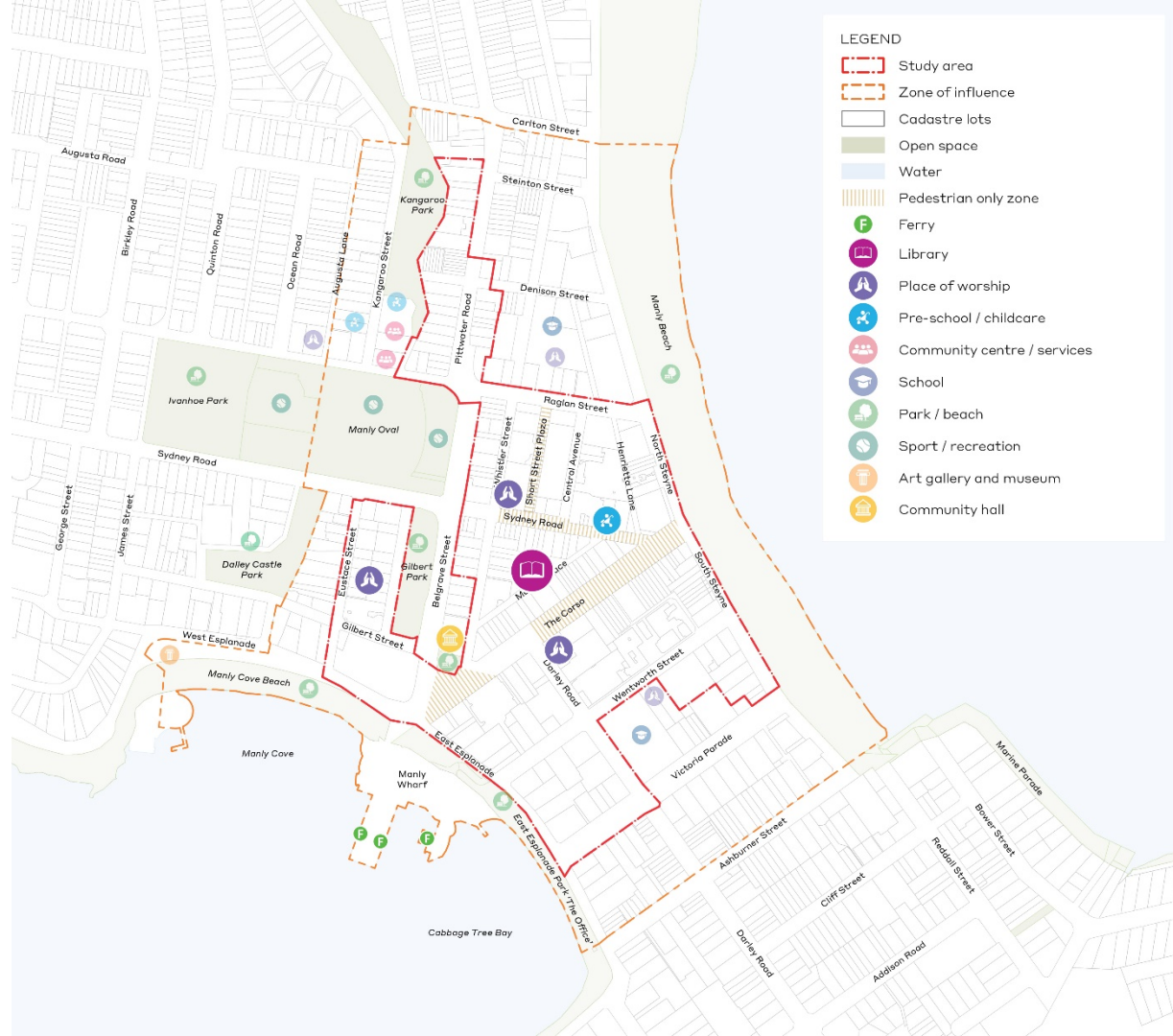
- Revitalising laneways and improving public domain and amenity
- Encourage design excellence and creative expression to reflect the LGA's diverse community, including Indigenous communities



Social infrastructure

Observations / Issues

- Well serviced with a range of open spaces (recreation, sport, social)
- Library is well-positioned in the heart of the Manly town centre
- Community-focused centres/services can lack integration and flexibility of use
- Manly Town Hall is being investigated as a future social infrastructure space



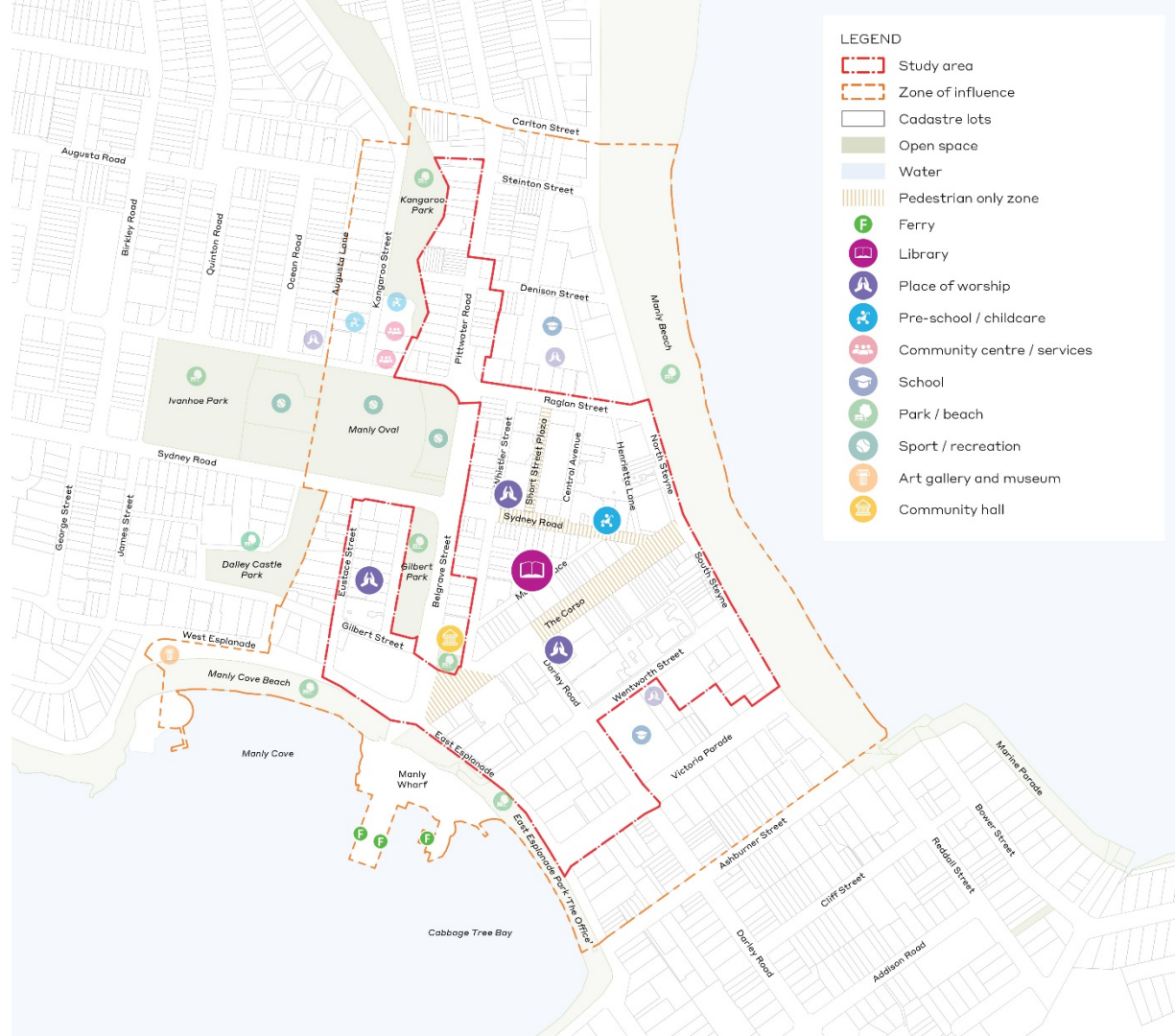
Social infrastructure

Observations / Issues

- Well serviced with a range of open spaces (recreation, sport, social)
- Library is well-positioned in the heart of the Manly town centre
- Community-focused centres/services can lack integration and flexibility of use
- Manly Town Hall is being investigated as a future social infrastructure space

Opportunities

- Activating and refurbishing existing community infrastructure
- Explore the potential of a networked approach between existing facilities
- Co-locating social infrastructure in mixed use areas to promote a greater diversity of use and to improve the liveability of Manly



Land use

Observations / Issues

- Study area has a wide mix of land uses
- Competition between land uses in Manly to serve the needs of workers, residents and visitors
- Protection and enhancement of Manly's character, identity and social significance
- Balancing short-term accommodation with affordable housing options for residents



Land use

Observations / Issues

- Study area has a wide mix of land uses
- Competition between land uses in Manly to serve the needs of workers, residents and visitors
- Protection and enhancement of Manly's character, identity and social significance
- Balancing short-term accommodation with affordable housing options for residents

Opportunities

- Balance of land use activities, including family related attractions at night
- Co-locating social infrastructure in mixed use areas to promote a greater diversity of use and to improve the liveability of Manly
- Potential to diversify the land use mix and ensure supply meets the need of emerging creative industries to support growth of innovation



Buildings and their design



Buildings and their design

Observations / Issues

- Significant number of heritage items – buildings and landscape



Buildings and their design

Observations / Issues

- Significant number of heritage items – buildings and landscape
- 50% of the study area is classified as a Heritage Conservation Area
- Remaining area – mixed building quality
- The areas of Heritage Conservation are subject to a separate heritage study (currently underway)



Buildings and their design

Observations / Issues

- Significant number of heritage items – buildings and landscape
- 50% of the study area is classified as a Heritage Conservation Area
- Remaining area – mixed building quality
- The areas of Heritage Conservation are subject to a separate heritage study (currently underway)

Opportunities

- Protect Manly's character, identity and social significance
- Explore opportunities to encourage walkability fine grain character and human-scale built form
- Encourage design excellence, creative expression and design that attracts tourism, business and to support resilience against climate change





Focus on economy

Economy

Commercial Market Overview

- Manly is a small commercial office market – ~42,000sqm of office floorspace
- Refurbishing commercial space to capitalise on strong demand in the office market - observed along The Corso and Sydney Road
- Office market has been performing well over the past 12-24 months – relatively vacancy rates low at circa 6%
- Demand driven by a mix of professional services, medical/healthcare and general business – generally owners/employees who value living and working locally
- Array of rental rates depending on location, size and quality of building/fit out:
 - Recently refurbished space - \$1,000/sqm to \$1,200/sqm of NLA
 - aged, tertiary grade space – \$400/sqm to \$600/sqm of NLA



Economy

Retail Market Overview

- Large and established retail market – estimated ~73,500sqm
- A broad mix of retailers are observed, geared towards servicing visitors, residents and workers.
- Unsurprisingly, Manly's retail sector has been impacted by COVID-19 over the course of 2020-2021 – vacancies around 8%-10%, with a relatively high turnover of retailers.
- A broad range of retail rents are observed across Manly, reflective of their location and exposure to pedestrian footfall.
- Prime retail rents along The Corso and North Steyne – ranging from \$1,400/sqm to \$2,500/sqm
- Less well-positioned shopfronts and/or poor building condition – ranging from \$700/sqm to \$1,000/sqm
- Despite soft trading conditions, demand for well-located retail assets is strong



Night-time economy

Defining night-time economy

The night time economy (NTE) is defined by NSW Treasury as all the commercial activity that takes place outside the traditional business day, including:

- Evening: 6pm – 9pm
- Night time: 9pm – 2am
- Late night: 2am – 6am

The NTE typically includes businesses like:

- Bars, clubs, and pubs
- Live music and entertainment
- Restaurants
- Supporting industries like accommodation, transport services, and retail

NTE Audit:

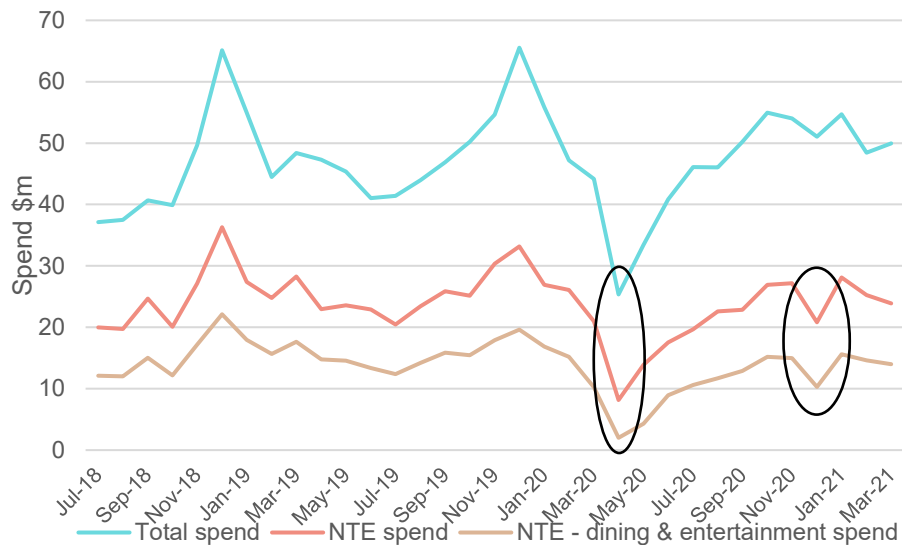
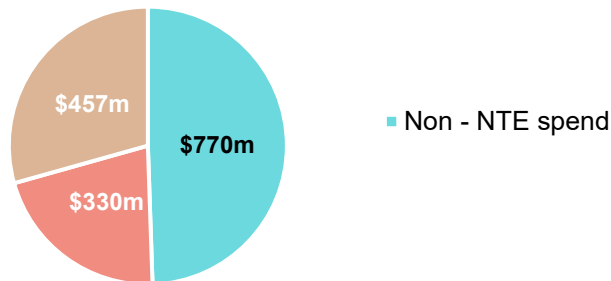
Due to the COVID-19 pandemic, HillPDA have been unable to perform our on-the-ground NTE audit and engagement with businesses and locals.



Value of the NTE

Observations / Issues

- Approximately 5% of employment in the Northern Beaches LGA is generated within Manly
- 27% of jobs (1,256 jobs) in the study area are directly linked to the NTE
- Almost 20% of the LGA's café and restaurant employment, and 28% of pub, tavern, and bar employment is in Manly
- 40% of the LGA's accommodation jobs are in Manly
- NTE industries constitute approximately 15% of the GVA in Manly
- Strong seasonality of expenditure



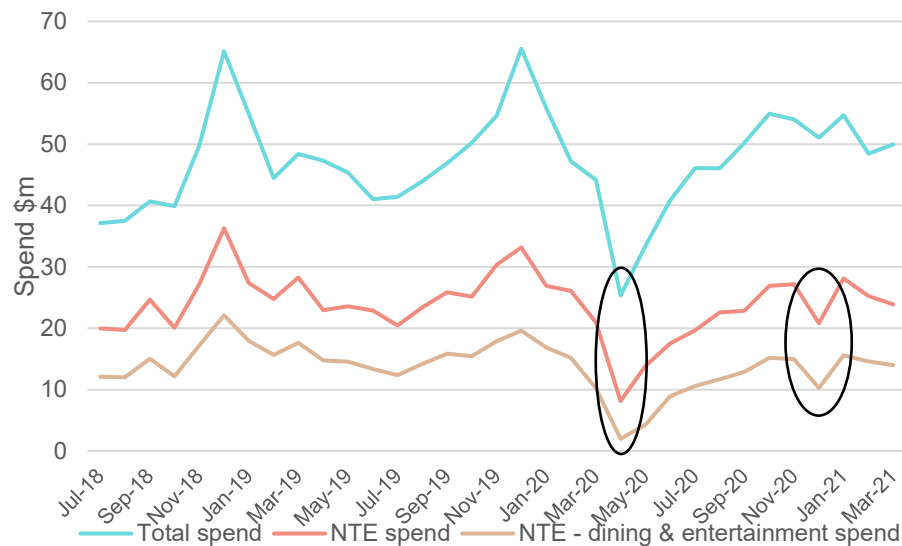
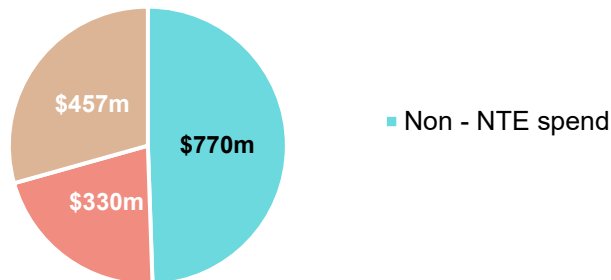
Value of the NTE

Observations / Issues

- Approximately 5% of employment in the Northern Beaches LGA is generated within Manly
- 27% of jobs (1,256 jobs) in the study area are directly linked to the NTE
- Almost 20% of the LGA's café and restaurant employment, and 28% of pub, tavern, and bar employment is in Manly
- 40% of the LGA's accommodation jobs are in Manly
- NTE industries constitute approximately 15% of the GVA in Manly
- Strong seasonality of expenditure

Opportunities

- Expand the business diversity in Manly's NTE – avoid overreliance on alcohol-related offerings
- 71% of total spend in Manly (2020) is generated by locals, with high incomes providing an opportunity to leverage that strong base with new retail, service, and entertainment businesses in the NTE



The night time environment

Observations / Issues

- There are only three late night premises operating in Manly, all bars/pubs/clubs
- Manly has very few small bar licences (two). Most liquor licences are on-premises or larger venues (likely louder, with larger groups and more focused on alcohol consumption)
- NTE is spread throughout the study area (possibly spread too thin)
- Land use conflicts arise through the interface between intensive NTE uses and residential uses – licensed / late night premises in the fringe areas of the study area may be more likely to face noise complaints



The night time environment

Observations / Issues

- There are only three late night premises operating in Manly, all bars/pubs/clubs
- Manly has very few small bar licences (two). Most liquor licences are on-premises or larger venues (likely louder, with larger groups and more focused on alcohol consumption)
- NTE is spread throughout the study area (possibly spread too thin)
- Land use conflicts arise through the interface between intensive NTE uses and residential uses – licensed / late night premises in the fringe areas of the study area may be more likely to face noise complaints

Opportunities

- Provide defined areas for intensive, focused NTE activities to minimise risk of negative impacts on other land uses
- Improve planning provisions around noise and vibration – potentially offering better outcomes for residents and businesses
- Encourage better noise and vibration controls in residential developments to protect existing and future NTE
- Consider DAs (within an identified area) being required to provide noise assessments

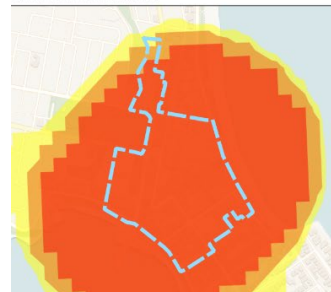


Safety and social amenity in the NTE

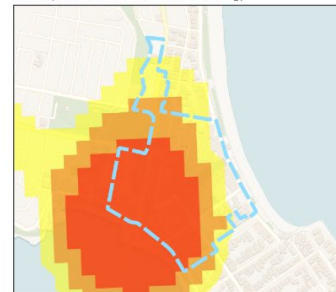
Observations / Issues

- Strong crime hot spots across the study area
- Most crimes occur at rates lower than NSW average, but alcohol-related and non-domestic assault rates are very high
- Crime in Manly has a seasonal component, with peaks generally across December-March
- Manly is host to a high concentration of liquor licences
- Previous engagement findings identify numerous safety concerns in Manly, particularly during dusk and night time
- Reported causes of residents feeling unsafe included drug and alcohol affected people, loitering, violence and aggressive behaviour

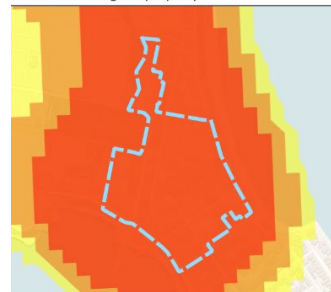
Alcohol-related assault



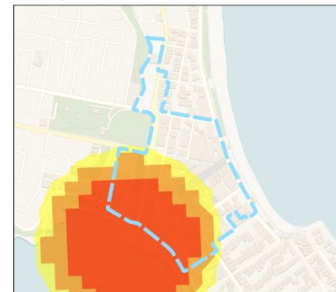
Theft (break and enter non-dwelling)



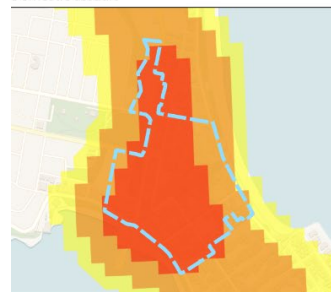
Malicious damage to property



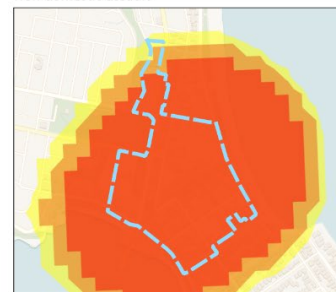
Robbery



Domestic assault



Non-domestic assault



Legend

Study area boundary

Crime density (April 2020 – March 2021)

High

Medium

Low

Safety and social amenity in the NTE

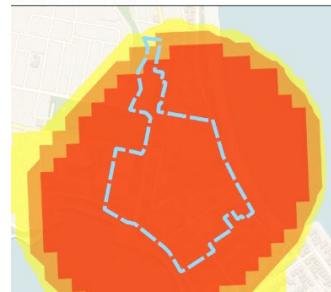
Observations / Issues

- Strong crime hot spots across the study area
- Most crimes occur at rates lower than NSW average, but alcohol-related and non-domestic assault rates are very high
- Crime in Manly has a seasonal component, with peaks generally across December-March
- Manly is host to a high concentration of liquor licences
- Previous engagement findings identify numerous safety concerns in Manly, particularly during dusk and night time
- Reported causes of residents feeling unsafe included drug and alcohol affected people, loitering, violence and aggressive behaviour

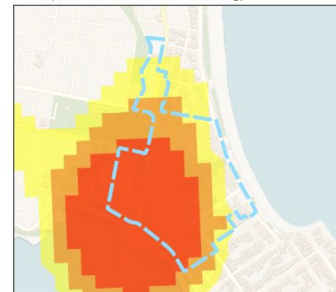
Opportunities

- Improve range of non-alcohol related NTE offerings
- Reduce antisocial behaviour through planning and design intervention, potentially including more flexible closing times
- Provide more family-friendly night time activities

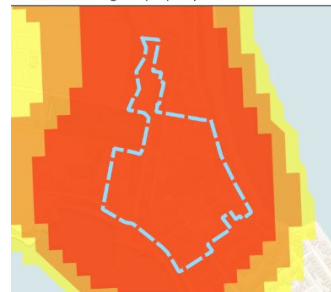
Alcohol-related assault



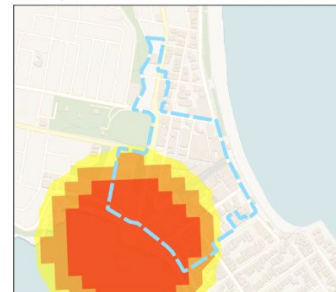
Theft (break and enter non-dwelling)



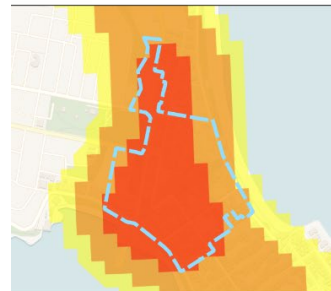
Malicious damage to property



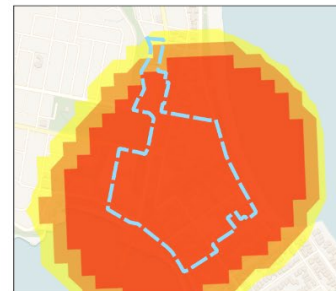
Robbery



Domestic assault



Non-domestic assault



Legend

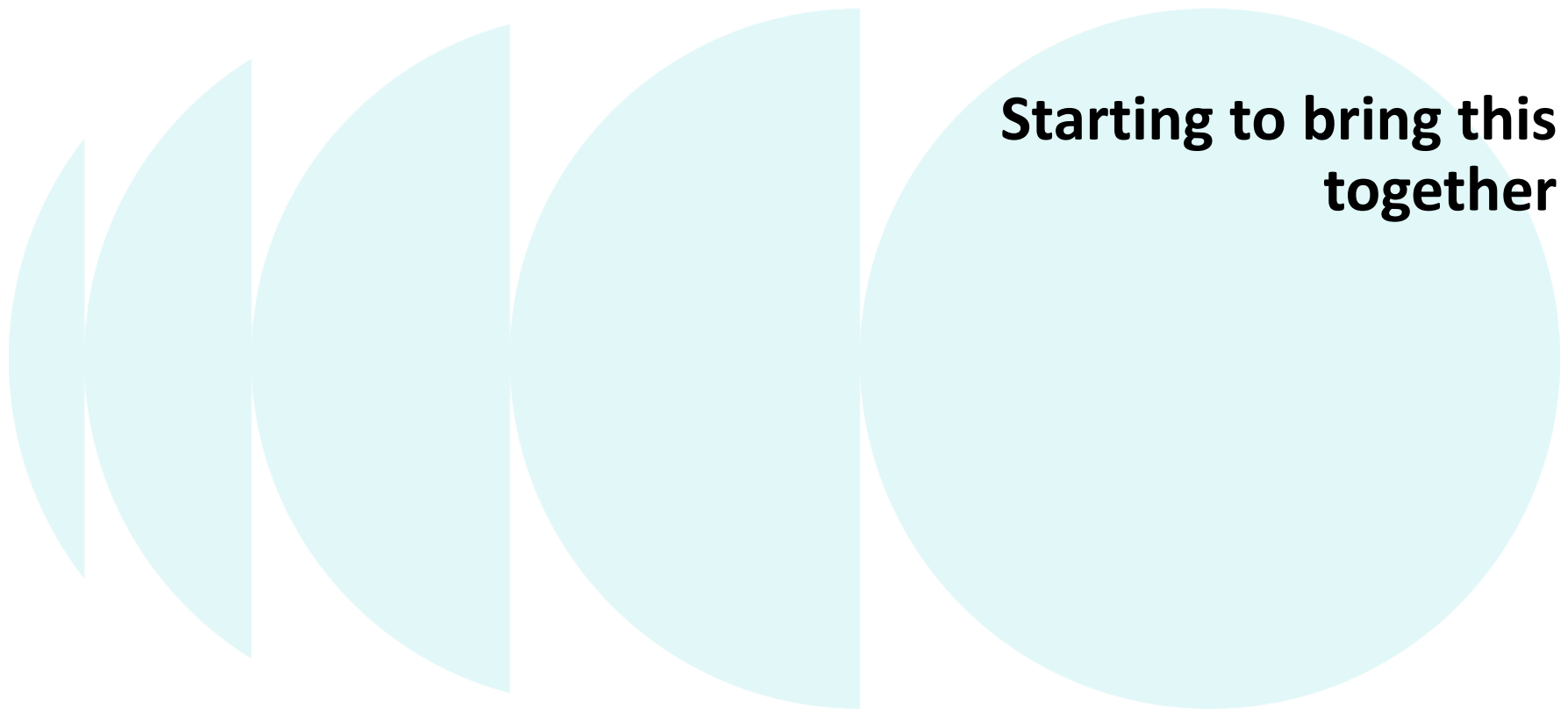
Study area boundary

Crime density (April 2020 – March 2021)

High

Medium

Low



**Starting to bring this
together**

Starting to bring this together

Key Baseline

- Manly is a place of natural beauty and significant landscape, coastline, vegetation and open spaces
- Study area contains several key pedestrian routes, including the Corso connecting the Manly Wharf to Manly Beach
- Current vehicle movement network results in high levels of circulating traffic on local streets
- Quieter streets and laneways adjacent to the Corso are where village life takes place
- Well serviced with a range of open spaces (recreation, sport, social) and central library
- Significant number of heritage items which provide a strong building character in locations
- Strong office market performance with relatively vacancy rates low (circa 6%)
- Despite soft trading conditions, demand for well-located retail assets is strong
- Presence of antisocial behaviour and alcohol related crime issues



Starting to bring this together

Priority Issues

- Resilience in the context of its coastal setting, climate change
- Lack of high frequency road based public transport services and roads act as a barrier to key pedestrian movement corridors
- Open space is within proximity to each other, but lacking connectivity
- Mixed building quality and an imbalance in character of the village
- Constant movement of large crowds through the Corso undermines its potential to also be a village centre
- Social infrastructure lacks flexibility and integration
- Design of public space and creative installations
- Interventions and improved range of non-alcohol and family related NTE offerings to reduce antisocial behaviour





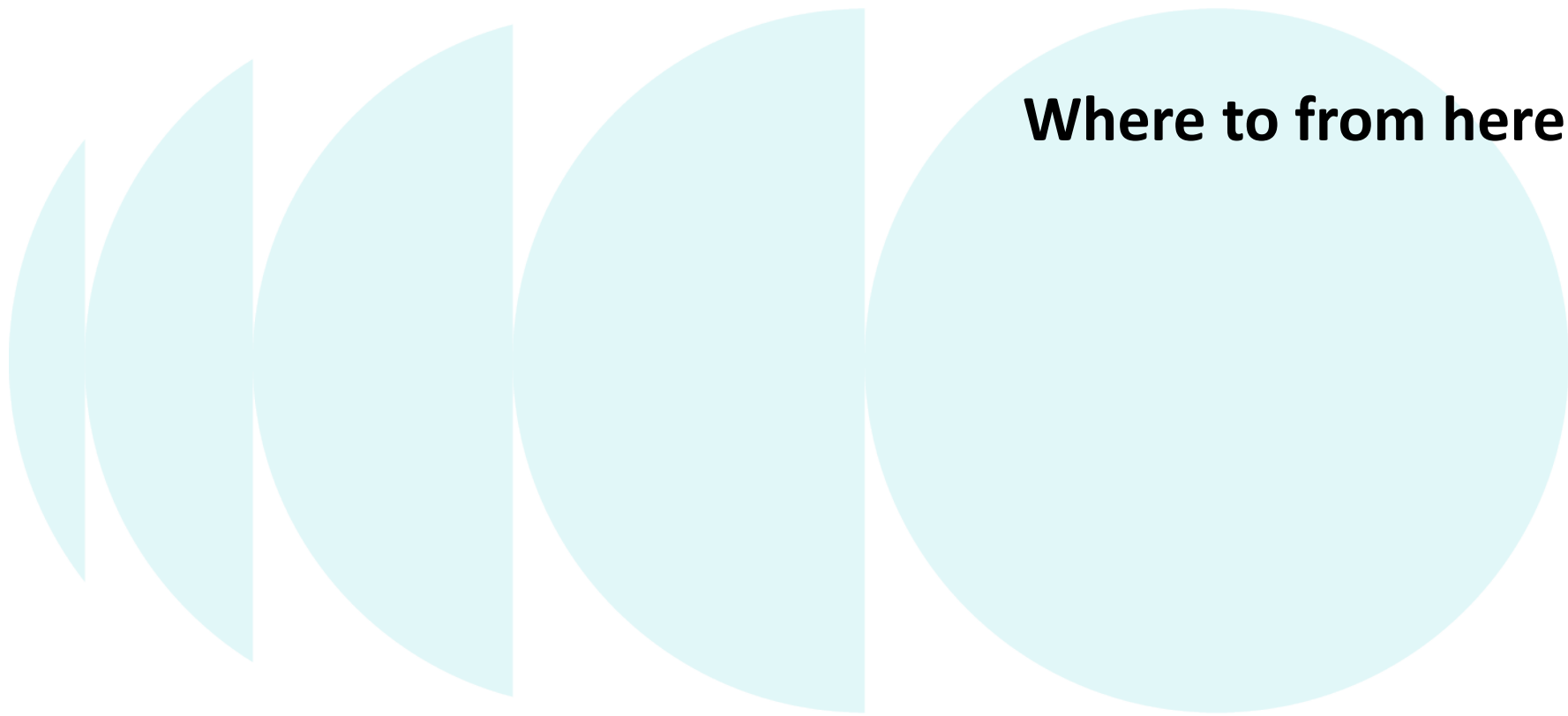
Facilitated Q & A

Facilitated Q & A

What do you like, and
what don't you like,
about Manly now, and
why

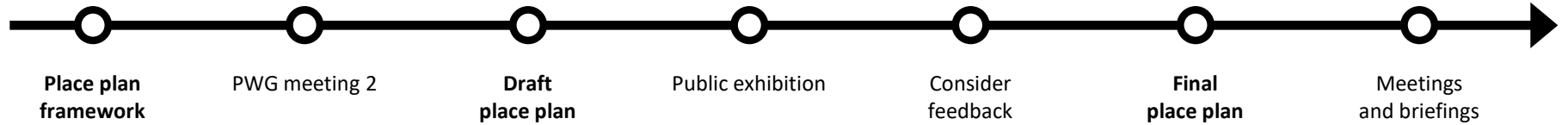


Looking forward
20 years, what would you
like to see in Manly, and
why



Where to from here

Where to from here



ETHOS
URBAN