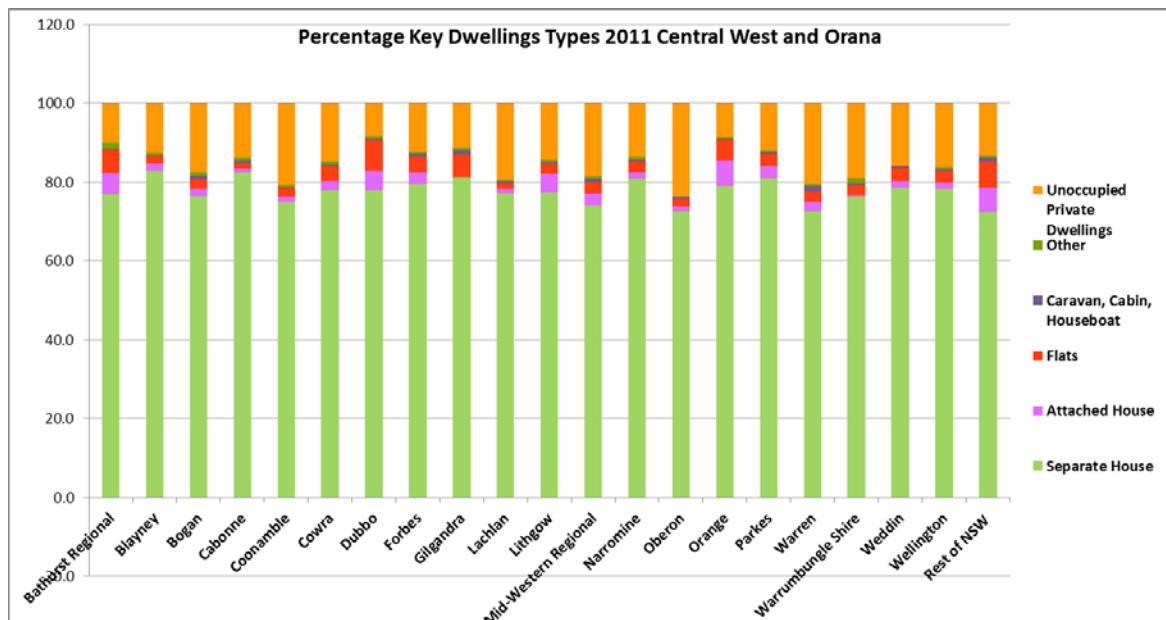


Central West and Orana Region – What’s Happening with Housing Supply and is it a good match?

Dwelling Type

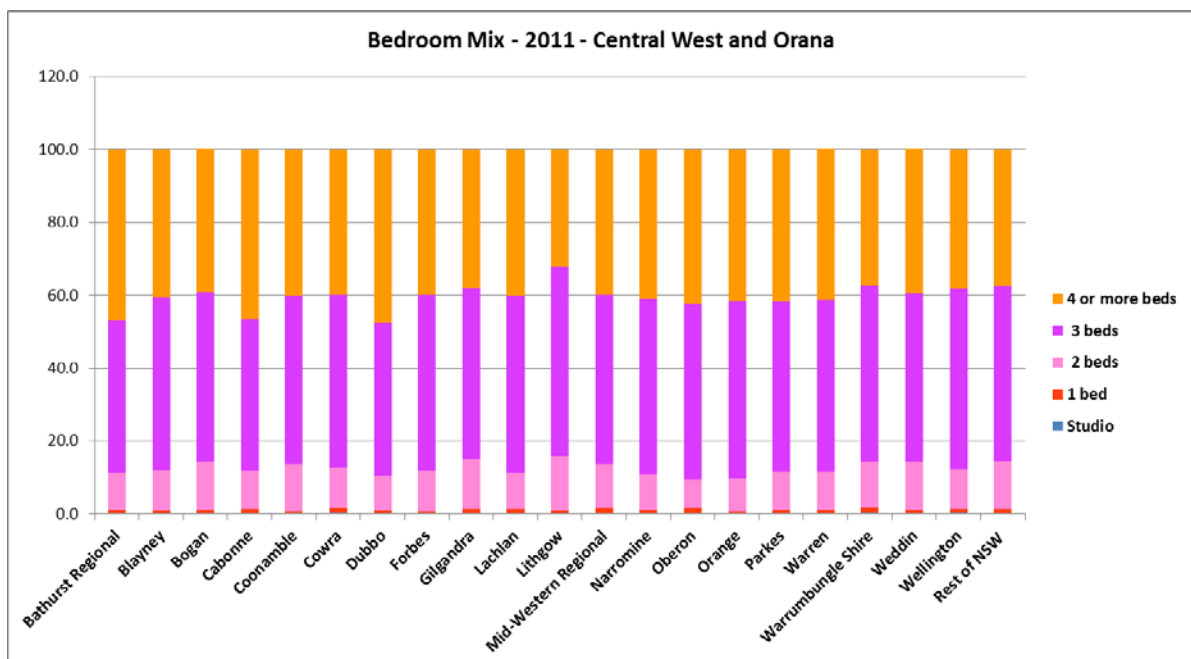
- An absolute majority of dwellings in the Central West and Orana are separate houses, comprising between 82.9% in Blayney and 72.4% in Oberon – with every LGA in the region having a higher proportion of separate houses than the average of 72.2% across the Rest of NSW.
- Attached houses comprise between 6.4% (Orange) and 0.2% (Gilgandra) compared to 6.4% in the Rest of NSW, while flats make up between 5.9% (Bathurst) and 1.2% (Cabonne), compared to 6.7% on average in the Rest of NSW.
- At the 2011 Census there were 517 households living in caravan, cabin and houseboat accommodation in the region, down from 695 in 2006. Most of the losses occurred in Dubbo, Mid-Western Regional, followed by Cowra, Narromine, Wellington and Gilgandra, with small gains in Lithgow, Lachlan and Bogan. Caravan or residential park accommodation is one of the few remaining affordable housing options for lower income earners and the decline in numbers in the Central West and Orana region is another indicator of the loss of affordable housing.
- Note that most of the LGAs in this region (Bogan, Cabonne, Coonamble, Cowra, Gilgandra, Lachlan, Lithgow, Mid-Western Regional, Oberon, Warren, Warrumbungle, Weddin and Wellington) had higher proportions of unoccupied dwellings (ranging between 23.7% and 13.6%) than the average of 13.4% for the Rest of NSW. While some of these are likely to be holiday or second homes, some may be due to farm amalgamations or abandoned homes, particularly in areas of population decline.
- The graph below shows the proportion of key dwelling types in each local government area in the region as well as for the Rest of NSW. The figures demonstrate the lack of diversity in dwelling types in the Central West and Orana.



Bedroom Mix

- In spite of the fact that across the region lone person and couple households comprise between 50% and 62% of all households, the overwhelming majority of homes have three, four or more bedrooms, ranging between 90.6% in Oberon and 84.0% in Lithgow.

- Two bedroom homes comprise between 7.7 and 15% of all dwellings, one bedroom between 0.3% and 1.5% and studio dwellings between just 0.1% and 0.5% of all dwellings across the region.
- Every single Central West and Orana region LGA lost studio dwelling stock between 2006 and 2011, ten LGAs lost one bedroom stock and eighteen lost two bedroom stock. Over the same period, all but six (Bogan, Coonamble, Gilgandra, Lachlan, Warren and Warrumbungle) of the Central West and Orana LGAs had a significant increase in four bedroom dwellings. The trend to the increase in four bedroom stock at the expense of diversity and loss in other bedroom categories is common across the Rest of NSW.
- Lithgow and Gilgandra are the only LGAs in the region with a higher combined proportion of studios, one and two bedroom dwellings than the Rest of NSW average (just 14.6%). Within the region, the high proportion of seniors and frail aged as well as lone person households suggests that the proportion of studio, one and two bedroom dwellings should be much higher. In particular, frail aged are less able to deal with maintenance of a large house and garden.
- The graph below shows the proportion of studio, one, two, three and four or more bedroom dwellings in each Central West and Orana LGA at the 2011 Census. It demonstrates the very high proportions of three and four or more bedroom stock and the insignificant level of provision of studio and one bedroom dwellings.



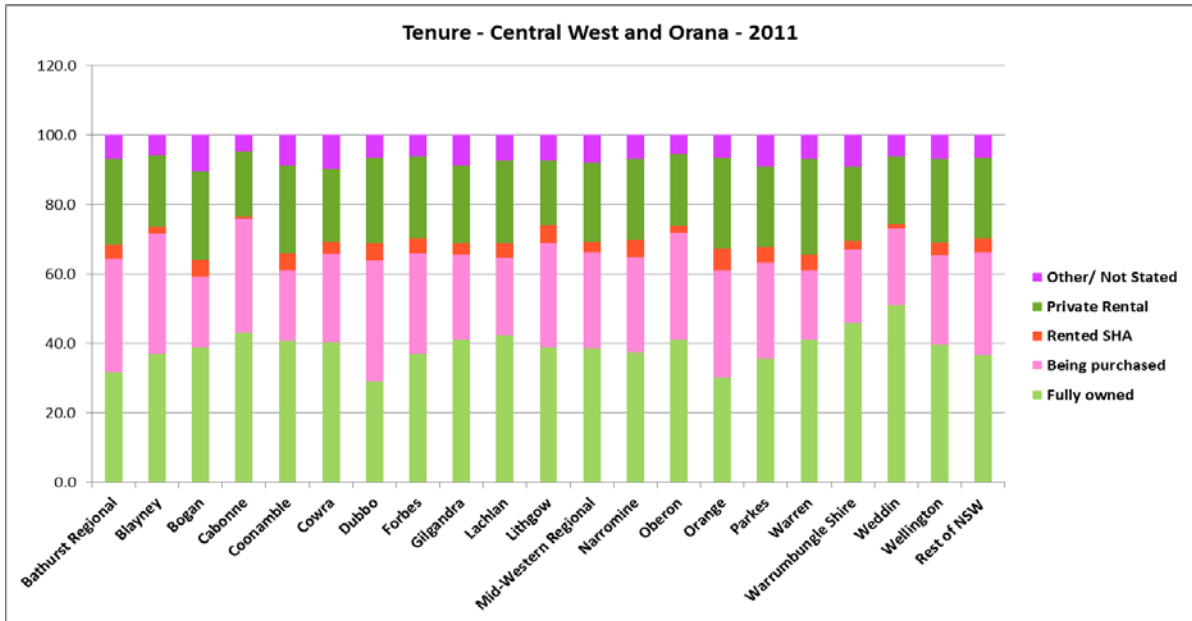
- The table below shows the change in the number of bedrooms for studio (0), one, two, three and four or more bedroom dwellings between 2001 and 2011.

Change in number of bedrooms 2001 – 2011

| Area | 0 bedroom | 1 bedroom | 2 bedroom | 3 bedroom | 4 or more | Total |
|----------------------|-----------|-----------|-----------|-----------|-----------|--------|
| Bathurst Regional | -68 | 6 | -66 | -127 | 1,221 | 1,031 |
| Blayney | -12 | -2 | 38 | -43 | 208 | 202 |
| Bogan | -6 | 1 | -7 | -72 | -17 | -98 |
| Cabonne | -20 | 4 | -58 | -77 | 352 | 228 |
| Coonamble | -10 | -10 | -50 | -90 | -40 | -196 |
| Cowra | -24 | 4 | -84 | -287 | 195 | -162 |
| Dubbo | -71 | -4 | -229 | -444 | 1,041 | 365 |
| Forbes | -32 | -21 | -58 | -234 | 142 | -174 |
| Gilgandra | -13 | -3 | -6 | -39 | -17 | -62 |
| Lachlan | -10 | 6 | -56 | -71 | -23 | -146 |
| Lithgow | -28 | 5 | -36 | -191 | 330 | 112 |
| Mid-Western Regional | -98 | -26 | -145 | -61 | 522 | 280 |
| Narromine | -14 | 4 | -37 | -113 | 43 | -106 |
| Oberon | -18 | -1 | -7 | -37 | 109 | 64 |
| Orange | -53 | 4 | -82 | -279 | 914 | 556 |
| Parkes | -24 | 5 | -131 | -208 | 256 | -74 |
| Warren | -12 | -5 | -40 | -64 | -28 | -140 |
| Warrumbungle Shire | -28 | -7 | -77 | -183 | -6 | -264 |
| Weddin | -7 | 4 | 11 | -13 | 8 | 7 |
| Wellington | -13 | -4 | -86 | -73 | 63 | -94 |
| Rest of NSW | -7,680 | -515 | -7,180 | -7,379 | 59,288 | 43,946 |

Tenure

- There has been a decline in the proportion of households which own their home outright in every LGA in the region (falling by between 11.3% in Cabonne and 1.4% in Oberon). Over the same period there have been increases in the proportion of households purchasing their home in every LGA in the region (by between 12.1% in Cabonne and 4.2% in Orange).
- Bucking the trend in the Rest of NSW, fifteen of the region's LGAs have also experienced a small decline in private rental housing while the remainder had small increases in the proportion of private rental (between 1.9% in Cowra and 0.1% in Gilgandra).
- Bathurst Regional (24.9%), Bogan (25.4%), Coonamble (25.2%), Dubbo (24.3%), Forbes (23.4%), Lachlan (23.8%), Narromine (23.3%), Orange (26.0%), Warren (27.7%) and Wellington (23.3%) had a higher proportion of private rental than the average of 23.0% for the Rest of NSW. The remaining LGAs all had a lower proportion of private rental, with Lithgow having the lowest at 18.6%. Generally the regional centres have higher proportions of rental housing, which is important given the role that these centres play in providing housing choice.
- The graph below shows the proportion of households in each of the key tenures for each of the LGAs in the region at the 2011 Census.



Public Housing

The table below shows the number of public housing properties in the Central West and Orana region as at December 2014. Please note that Census data on public housing is not particularly accurate, as public housing tenure is under reported in the Census. The figures below do not include community housing properties.

| Area | Public Housing stock |
|----------------------|----------------------|
| Bathurst Regional | 597 |
| Blayney | 60 |
| Bogan | 48 |
| Cabonne | 28 |
| Coonamble | 39 |
| Cowra | 223 |
| Dubbo | 730 |
| Forbes | 202 |
| Gilgandra | 40 |
| Lachlan | 61 |
| Lithgow | 517 |
| Mid-Western Regional | 44 |
| Narromine | 84 |
| Oberon | 27 |
| Orange | 827 |
| Parkes | 278 |
| Warren | 28 |
| Warrumbungle Shire | 54 |
| Weddin | 18 |
| Wellington | 95 |
| Rest of NSW | 36,388 |

Expected Waiting Time by Table

| ALLOCATION ZONE | 1 bedroom | 2 bedrooms | 3 bedrooms | 4 bedrooms |
|-----------------------------|-----------|------------|------------|------------|
| S32 BATHURST | Blue | Red | Red | Blue |
| S33 BLAYNEY | Blue | Blue | Blue | Blue |
| S36 CANOWINDRA/CABBONE | Blue | Green | Green | Yellow |
| S40 COONAMBLE | Grey | Blue | Green | Blue |
| S41 COWRA | Blue | Blue | Blue | Blue |
| S42 DUBBO | Blue | Blue | Blue | Yellow |
| S43 FORBES | Green | Blue | Green | Blue |
| S44 GILGANDRA | Grey | Blue | Blue | Blue |
| S47 MUDGEE CH HOUSING ONLY | Yellow | Blue | Blue | Blue |
| S48 NARROMINE | Blue | Blue | Red | Blue |
| S49 OBERON | Grey | Blue | Blue | Yellow |
| S50 ORANGE | Yellow | Yellow | Blue | Blue |
| S51 PARKES | Blue | Blue | Blue | Blue |
| S52 RYLSTONE | Grey | Green | Green | Grey |
| S54 WARREN | Grey | Green | Yellow | Blue |
| S55 GRENFELL | Grey | Blue | Yellow | Red |
| S56 WELLINGTON | Blue | Blue | Blue | Blue |
| S57 HILL END | Grey | Grey | Grey | Grey |
| S58 NYNGAN | Blue | Yellow | Blue | Green |
| S60 BINAWAY | Grey | Grey | Grey | Red |
| S61 CARCOAR | Grey | Grey | Grey | Grey |
| S63 CUMNOCK | Grey | Grey | Grey | Grey |
| S65 EUGOWRA | Grey | Grey | Red | Grey |
| S66 GEURIE | Grey | Grey | Grey | Grey |
| S68 GOOLOOGONG | Grey | Yellow | Grey | Grey |
| S70 GULGONG CH HOUSING ONLY | Blue | Blue | Yellow | Green |
| S72 LYNDHURST | Grey | Grey | Grey | Grey |
| S73 MANDURAMA | Grey | Grey | Grey | Grey |
| S74 MANILDRA | Grey | Grey | Grey | Grey |
| S76 MILLTHORPE | Grey | Red | Red | Grey |
| S77 MOLONG | Blue | Yellow | Yellow | Red |
| S79 PEAK HILL | Blue | Blue | Yellow | Red |
| S82 STUART TOWN | Yellow | Yellow | Yellow | Grey |
| S83 TOTTENHAM | Grey | Grey | Grey | Grey |
| S84 TRANGIE | Green | Green | Yellow | Green |
| S85 TRUNDLE | Grey | Red | Red | Grey |
| S86 TULLAMORE | Grey | Grey | Grey | Grey |
| S87 ULAN | Grey | Grey | Grey | Grey |
| S89 WOODSTOCK | Grey | Grey | Grey | Grey |
| S90 YEOVAL | Red | Grey | Grey | Grey |
| S110 LAKE CARGELLIGO | Grey | Green | Green | Blue |

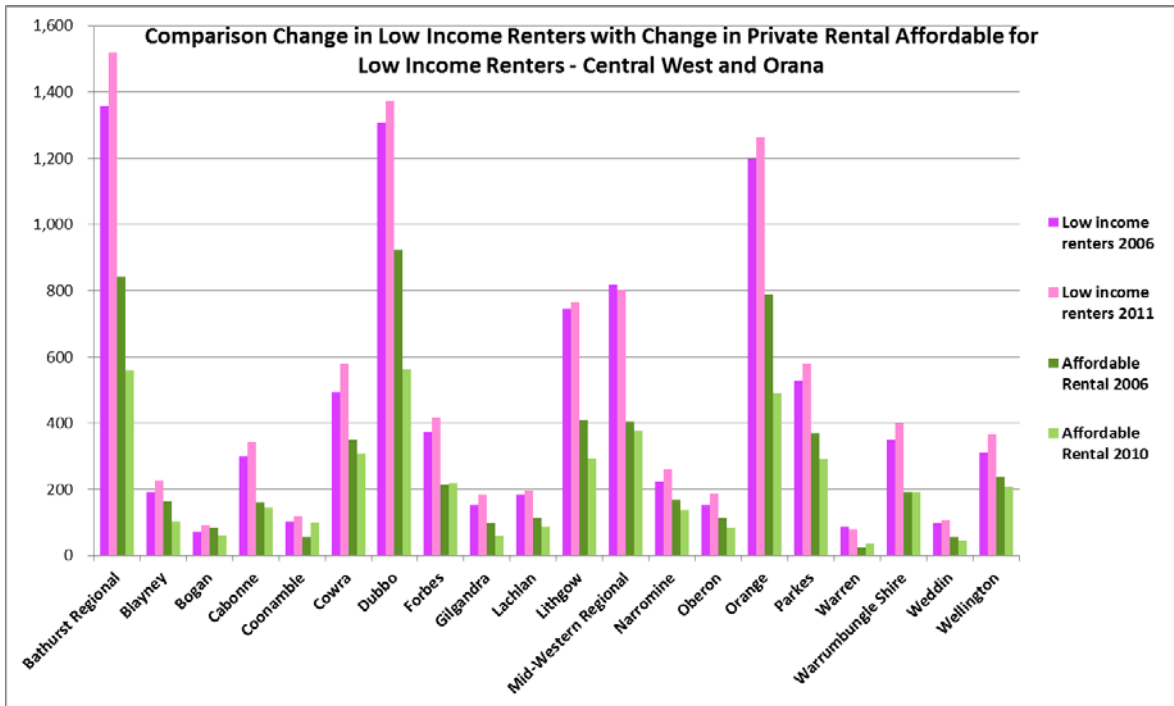
| Legend for Expected Wait Time Bands | |
|-------------------------------------|---------------|
| | Up to 2 years |
| | 2 to 5 years |
| | 5 to 10 years |
| | 10 + years |
| | No properties |

NOTE: Expected Waiting Time data is as at 30 June 2014.

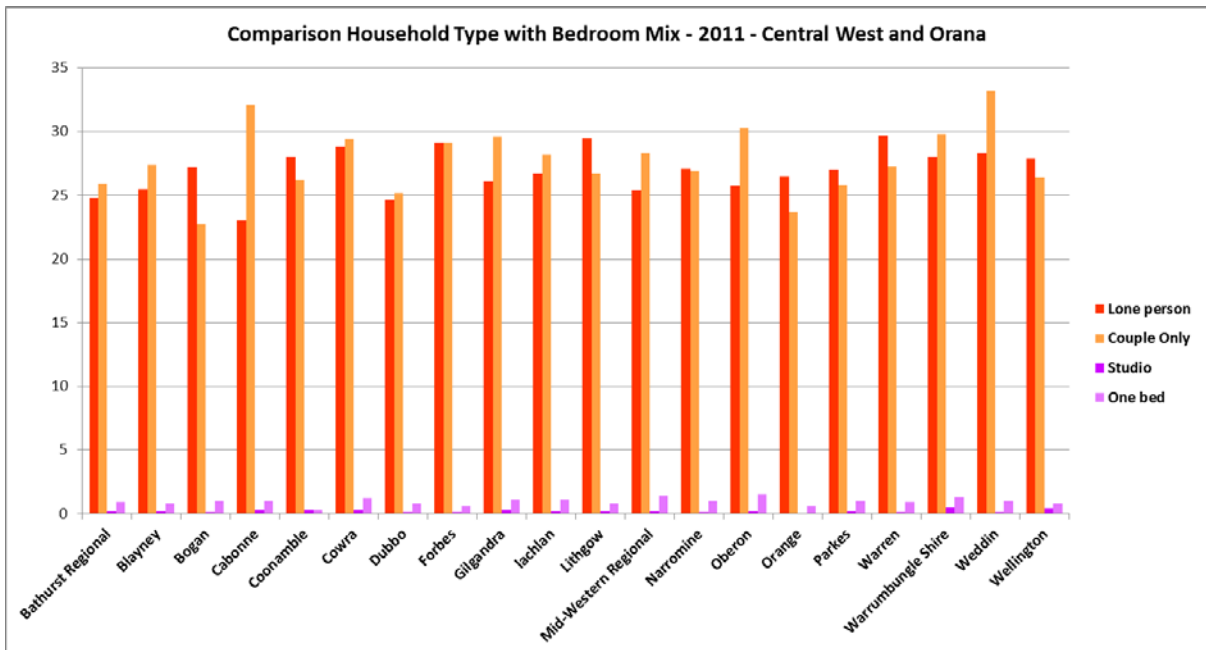
The table above shows the expected waiting times for general housing approved social housing applicants (not for priority housing applicants) by bedroom category in the Central West and Orana region. According to the 2011 Census, Bogan, Coonamble, Dubbo, Forbes, Lachlan, Lithgow, Narromine, Orange, Parkes and Warren all have a higher proportion of public housing than the Rest of NSW average of 4.0%. All the remaining LGAs have a lower proportion.

The Gap

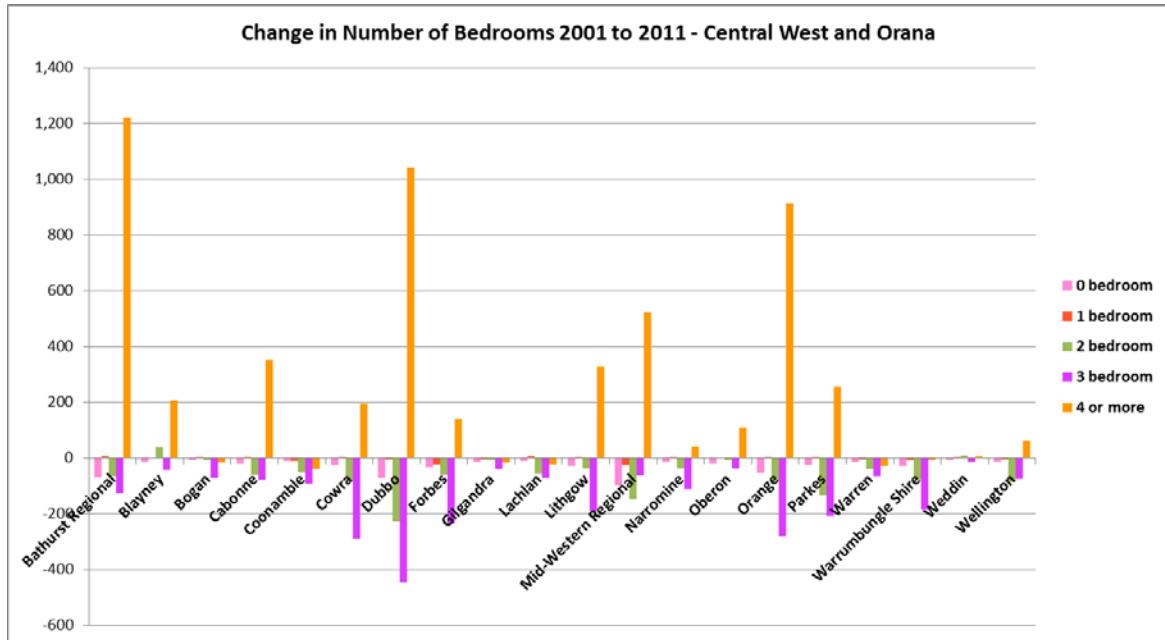
- Although low income earners comprise the largest proportion in every Central West and Orana LGA and the number of low income households (and more particularly low income rental households) is increasing in almost every LGA in the region, across the region there has been a decline in both rental and purchase affordability. There is a growing gap between supply and demand for affordable housing for low income households.
- The dwelling stock was largely built at a time when couple family households were the dominant household type. The proportion of lone person and couple households has increased to the point of being a very significant proportion of all households. DPE population projections forecast a continued strong increase in these household types across the region, wherever population growth is predicted, to 2031. The dwelling stock has not changed to suit the change in household types.
- Within the region, the high proportion of seniors and frail aged as well as lone person households suggests that the proportion of studio, one and two bedroom dwellings should be much higher. Frail aged residents are less able to deal with maintenance of a large house and garden. Significant and increasing proportions of seniors and frail aged will impact on the housing needs of the region and appropriate housing responses.
- Yet most LGAs lost studio, one, two and three bedroom stock and had a significant increase in four bedroom stock. Consequently there is a poor and worsening match between household type, household need and bedroom numbers.
- A proactive stance is required to increase the number of one and two bedroom dwellings suitable for single and couple only households. This would provide greater flexibility in the dwelling stock to meet the range of housing needs in the local community, including for older age groups. This also has the potential of assisting in affordability.
- The university in Bathurst increases the demand for affordable rental housing in that LGA. New generation boarding houses would provide more affordable rental housing suitable for students. There is also potential for this accommodation type to meet some of the fluctuating additional demand for housing in mining communities (such as Mid-Western Regional). An influx of mining and construction workers can impact negatively on the availability of affordable rental accommodation for local residents. New generation boarding houses may also suit seasonal and key workers.
- The graph below compares the change in the number of low income renters between 2006 and 2011 with the change in the number of affordable rental (as measured by bonds lodged that were affordable to low income households in 2006 and 2010).



- Secondary dwellings suit a range of groups including small households, young people, frail aged and people with disability needing support from family. They may be readily encouraged on larger lots with reasonable access to centres providing a range of services and facilities.
- The graph below compares the number of lone person and couple only households with the number of one and two bedroom dwellings. It clearly demonstrates that there is a significant mismatch and a need for a better fit between these household types and the dwelling stock available.



- The graph below shows the change in the number of studio (0), one, two, three and four or more bedroom properties between 2001 and 2011 in every South and East Tablelands LGA.



Additional Data

More detailed housing data and tables used in this Snapshot are available from the Local Government Housing Kit Database on the Housing NSW website at: <http://www.housing.nsw.gov.au/Centre+For+Affordable+Housing/NSW+Local+Government+Housing+Kit/Local+Government+Housing+Kit+Database/>

More information on Expected Waiting Times for Public Housing is available on the Housing NSW website by region at: <http://www.housingpathways.nsw.gov.au/How+to+Apply/Expected+Waiting+Times/>