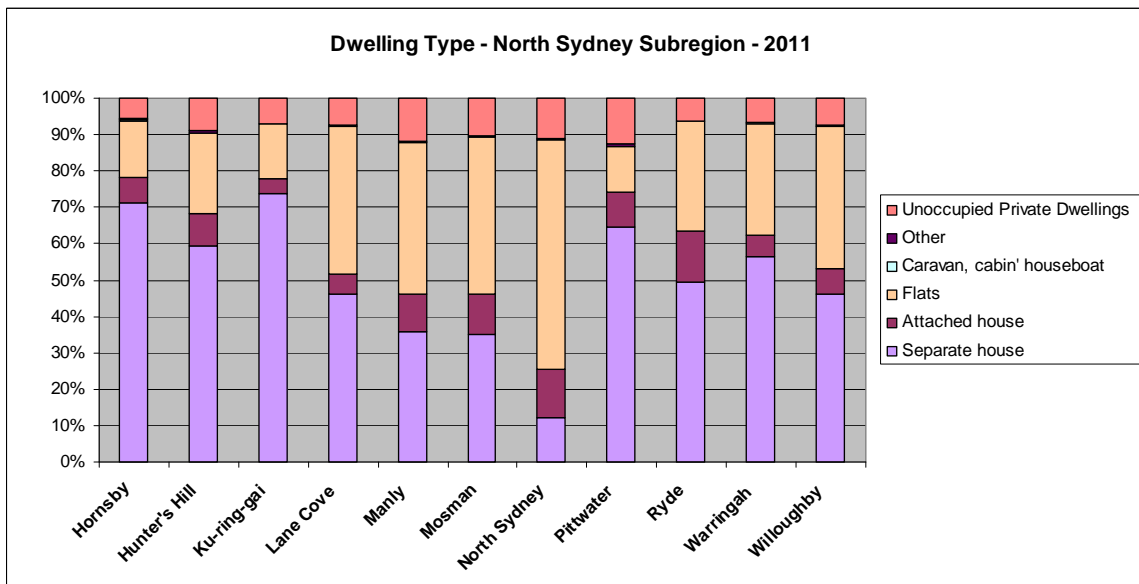


## North Sydney Subregion – What’s Happening with Supply and is it a good match?

### Dwelling Type

- At the 2011 Census, within the North Sydney Subregion, separate houses comprise between 12.3% (North Sydney) and 73.7% (Ku-ring-gai) of all dwellings, compared to the average of 56.5% across Sydney Statistical Division. For detached dwellings, the range is from 4.0% (Ku-ring-gai) to 14.2% (Ryde) compared to an average of 11.8% in Sydney SD. For units, the range is from 12.5% (Pittwater) to 63.1% (North Sydney) with the Sydney SD average being 23.9%.
- Some North Sydney subregion LGAs have a good mix of dwelling types, while others not so much. For example, in Hornsby 71% of dwellings are separate houses, with just 7% attached housing and less than 16% flats. Ku-ring-gai, Hornsby, Pittwater and Hunters Hill have a higher proportion of houses and lower proportion of units than the average for Sydney (56.5% and 23.9% respectively), and on that basis do not appear to have a good mix of housing types.
- The graph below gives the proportion of each key dwelling type at the 2011 Census.



### Bedroom Mix

- Across Sydney over the ten year period to the 2011 Census there has been a trend to the increase in four bedroom dwellings, much of this through adding bedrooms to existing housing stock. In some locations this has actually led to the loss of one, two and three bedroom stock, worsening the diversity of stock to meet changing housing needs.
- In the North Sydney subregion LGAs, the biggest increase has been in four or more bedrooms dwellings, with a total increase of 13,068 in the ten year period between 2001 and 2011. The next biggest increase was for two bedroom dwellings, with a total of 5,402. Two bedroom dwellings are the most flexible, being suitable for lone person, couple only and small family households, and therefore most capable of meeting a range of housing needs.
- The increase in studio dwellings in the North Sydney subregion over the ten years to 2011 was just 217 (with a decline in Lane Cove and Pittwater), for one bedroom dwellings was 2,166 (with a decline in Pittwater), and for three bedroom dwellings was an overall loss of

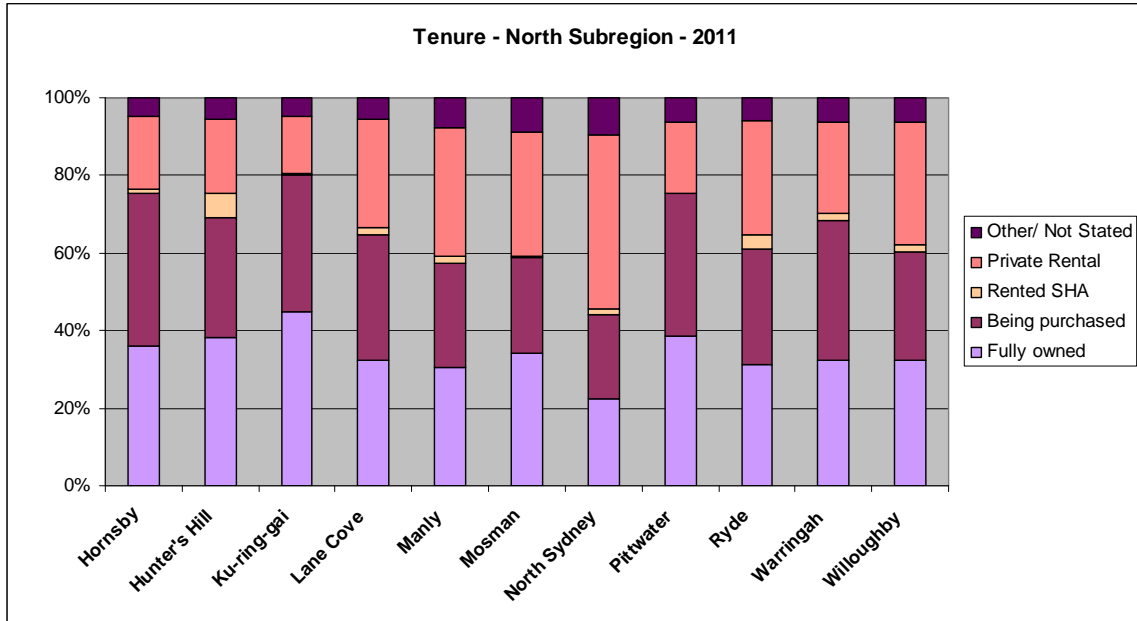
- 1,497 – with a loss of three bedroom stock occurring in Hornsby, Hunters Hill, Ku-ring-gai, Lane Cove, Mosman, Ryde and Warringah.
- It is worth noting that lone person and couple only households at 2011 in the North Sydney subregion comprised between 41% (Hornsby) and 62% (North Sydney) of all households. Yet combined studio, one and two bedroom stock in Hornsby at 2011 comprises just 15.4% of all dwellings; in Hunters Hill lone person and couple only households comprise 49.3% of all households yet studio, one and two bedroom stock make up just 18.5% of all dwellings; in Ku-ring-gai lone person and couple only households comprise 40.8% of households and studio, one and two bedroom stock represent just 10.2% of all dwellings; in Pittwater lone person and couple only households comprise 45.7% of all households yet studio, one and two bedroom stock make up just 15.5% of all dwellings. These LGAs in particular have a poor match between the types of households who live there and the bedroom mix available, although some other LGAs could also do better in matching need to suitable stock.
  - The table below gives the change in bedroom numbers for studio, one, two, three and four or more bedroom dwellings for each local government area in the North Sydney subregion between 2001 and 2011.

Change in number of bedrooms 2001 – 2011

Area	0	1	2	3	4	total
Hornsby	22	207	1,118	-756	2,781	3,372
Hunter's Hill	5	20	-10	-35	276	256
Ku-ring-gai	10	141	848	-96	1,510	2,413
Lane Cove	-10	72	88	-193	588	545
Manly	19	151	164	157	652	1,143
Mosman	0	46	-5	-115	298	224
North Sydney	55	391	1,002	608	328	2,384
Pittwater	-13	-84	-50	8	1,352	1,213
Ryde	64	407	381	-358	1,714	2,208
Warringah	3	295	1,186	-843	2,378	3,019
Willoughby	62	520	680	126	1,191	2,579
Total	217	2,166	5,402	-1,497	13,068	19,356

## Tenure

- The trend to decline in outright ownership and increase in households purchasing has also occurred in the North Sydney subregion. The decline in the proportion of households fully owning their home between 2001 and 2011 ranged between -15.2% in Ku-ring-gai and -6.2% in North Sydney LGA, compared with -10.0% across Sydney SD. The increase in purchasers over the same period ranged from 12.4% in Warringah to 8.5% in North Sydney, compared to 9.5% across Sydney SD. Some LGAs had increases in the proportion of private rental households, with Ku-ring-gai having the largest increase of 2.6%, followed by Willoughby with 1.9% and Hunters Hill with 1.7%. North Sydney, Mosman, Lane Cove, Pittwater and Warringah have actually lost private rental, probably through rental properties being sold and purchased for owner occupation.
- North Sydney, Manly, Mosman, Willoughby, Ryde and Lane Cove have a higher proportion of private rental than the average for Sydney of 26.1%, while Ku-ring-gai, Pittwater, Hornsby, Hunters Hill and Warringah have a lower proportion of private rental than the Sydney average. The higher proportion of private rental provides flexibility to meet changing household needs throughout the housing life cycle, while those LGAs with very low proportions of private rental (such as Ku-ring-gai) have much less flexibility.
- The graph below shows the proportion of households in each key tenure type for every local government area in the North Sydney subregion at the 2011 Census.



## Public Housing

The table below shows the number of public housing properties in the North Sydney Subregion as at September 2013. 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 September 2013
Hornsby	659
Hunter's Hill	345
Ku-ring-gai	20
Lane Cove	224
Manly	289
Mosman	53
North Sydney	582
Pittwater	4
Ryde	1,519
Warringah	946
Willoughby	428
Sydney SD	77,156

The table below shows the expected waiting times for general housing approved social housing applicants (not for priority housing applicants) by bedroom are more than 10 years in every allocation zone in the subregion.

Expected Waiting Time by Table				
ALLOCATION ZONE	1 bdrm	2 bdrms	3 bdrms	4 bdrms
<b>Northern Sydney District</b>				
CS4 NORTHERN SUBURBS				
CS5 NORTHERN BEACHES				

Legend for Expected Wait Time Bands

	Up to 2 years
	2 to 5 years
	5 to 10 years
	10 + years

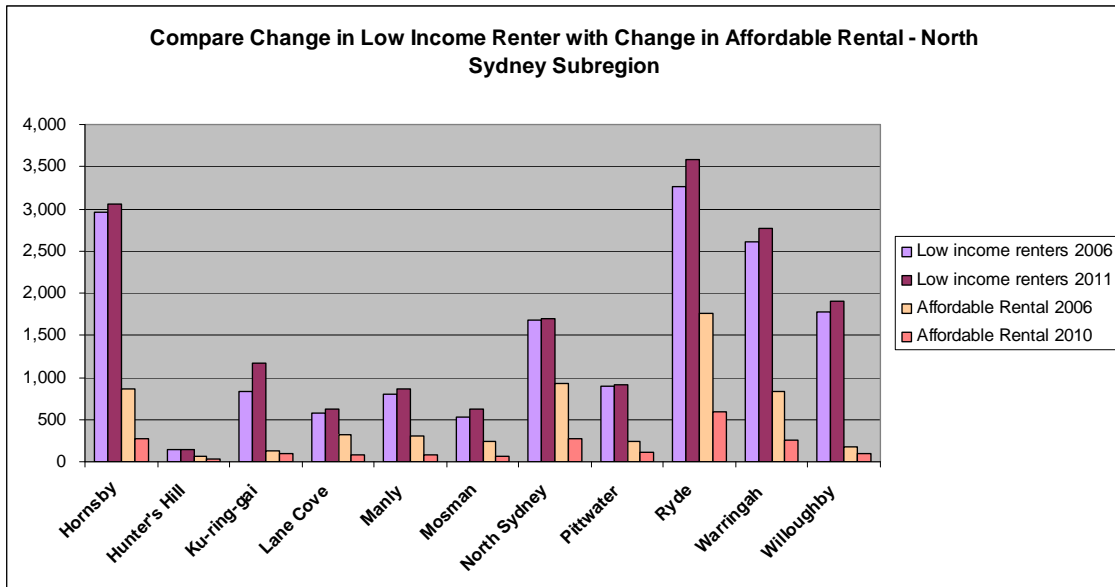
NOTE: Expected Waiting Time data is as at 31 December 2013.

More information on Expected Waiting Times for Public Housing is available on the Housing NSW website by region at:

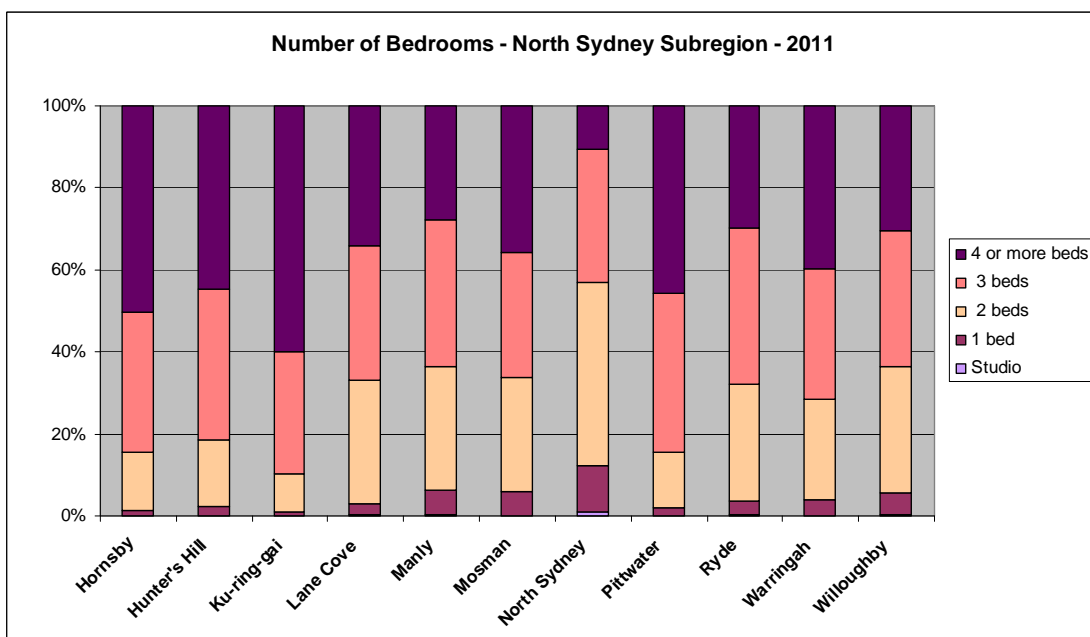
<http://www.housingpathways.nsw.gov.au/How+to+Apply/Expected+Waiting+Times/>

## The Gap

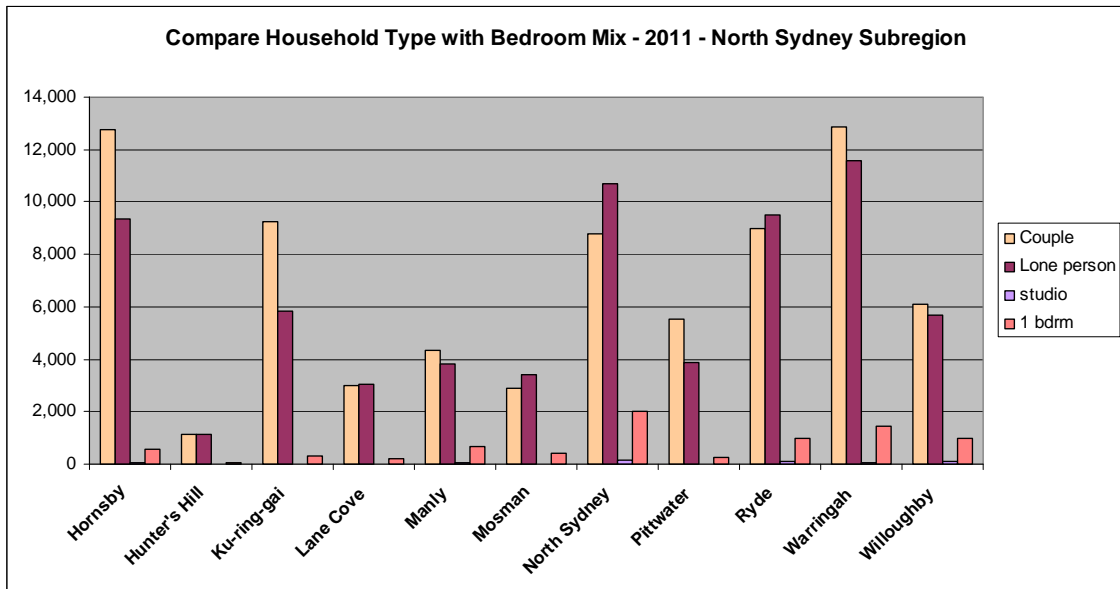
- There is a large and growing gap between the increasing number of low income households in the private rental market and the declining remnant of private rental properties that are affordable for low income households.
- Despite the predominance of high income households in this subregion, there are a growing number of low income households, a diminishing to almost non-existent supply of private rental accommodation that is affordable for lower income earners and a long term very tight private rental market. At the same time there is clearly strong demand for private rental, in part generated by proximity to employment in the northern part of the global corridor.
- There is a need for more targeted affordable private rental, including studios, new generation boarding houses and secondary dwellings to meet some of this demand and in response to the high proportions of seniors and frail aged in this subregion.
- An AHURI paper, "Australia's private rental market: changes (2001-2006) in the supply of, and demand for, low rent dwellings" by Maryann Wulff, A Dharmalingan, Margaret Reynolds and Judith Yates notes that across Australia "utilisation of low rent stock by higher income households leaves only one affordable and available dwelling for every five low-income households."
- It is therefore important that any new affordable housing supply is appropriately targeted to lower income households.
- The graph below compares the number of low income renters at 2006 and 2011 with the number of new rental bonds affordable to low income households at 2006 and 2010, for every local government area in the North Sydney subregion.



- While some parts of the subregion have diversity of both dwelling type and bedroom mix, and a reasonable fit between household type and bedroom number (for example North Sydney) others have little diversity and a poor fit between household type and bedroom number. This fit is likely to worsen with the forecast increase in lone person and couple only households and with the ageing of the population, unless proactive measures are taken to improve the mix.
- This issue is evident through the significant increase in four bedroom properties between 2001 and 2011, despite the fact that lone person and couple only households comprise between 41% (Hornsby) and 62% (North Sydney) of all households in this subregion.
- The high and growing numbers of lone person and couple only households suggest there is scope for more studio, one and two bedroom stock. Given the high numbers of seniors and frail aged in this subregion, secondary dwellings would also be an appropriate housing response.
- The graph below shows the proportion of each bedroom category by local government area within the North Sydney subregion at the 2011 Census.



- The graph below compares the number of couple only and lone person households with the number of studio and one bedroom dwellings for each local government area in the North Sydney subregion at the 2011 Census.



## 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/>