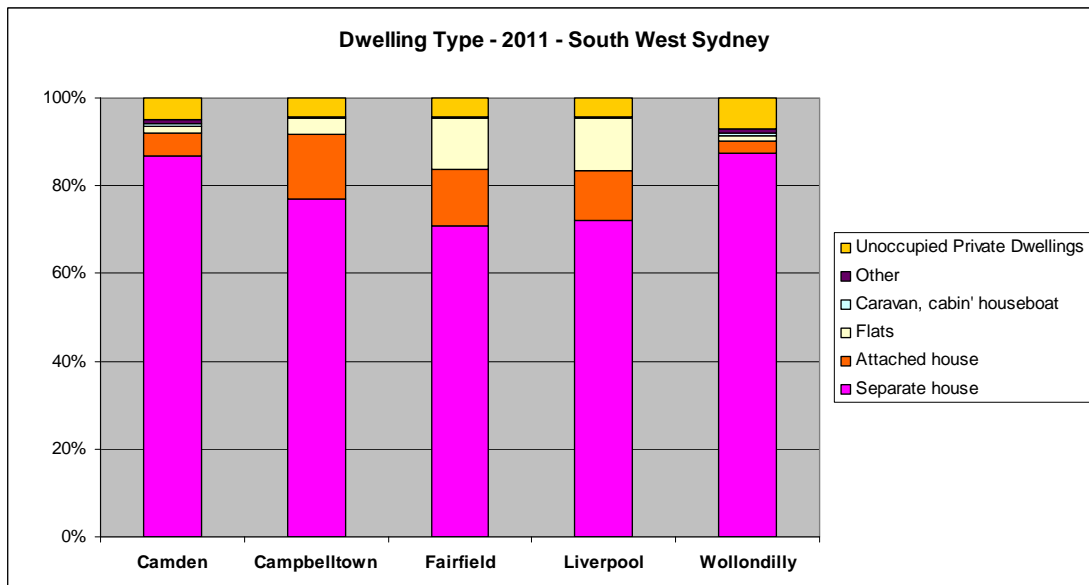


South West Sydney Subregion – What’s Happening with Housing Supply and is it a good match?

Dwelling Type

- The vast majority of dwellings in Sydney South West are separate houses, ranging from 87.7% of all dwellings in Wollondilly in 2011 to 70.8% in Fairfield, compared to the average of 56.5% across Sydney.
- In the South West region local government areas, the proportion of attached dwellings ranges between a mere 2.8% in Wollondilly to 14.7% in Campbelltown, with the average for Sydney being 11.8%
- For flats, the proportion varies from a tiny 1.5% in both Camden and Wollondilly, to 12.1% in Liverpool, with the average for Sydney being 23.9%.
- Fairfield and Liverpool have the greatest diversity of housing stock within the subregion, with the highest proportion of flats (just 11.5% and 12.1%), while Campbelltown has the highest proportion of attached houses. All have a much lower proportion of flats than the average for Sydney.
- Generally there is little diversity of housing stock across the subregion.
- The graph below shows the proportion of key dwelling types at the 2011 Census in each of the South West Sydney subregion local government areas.

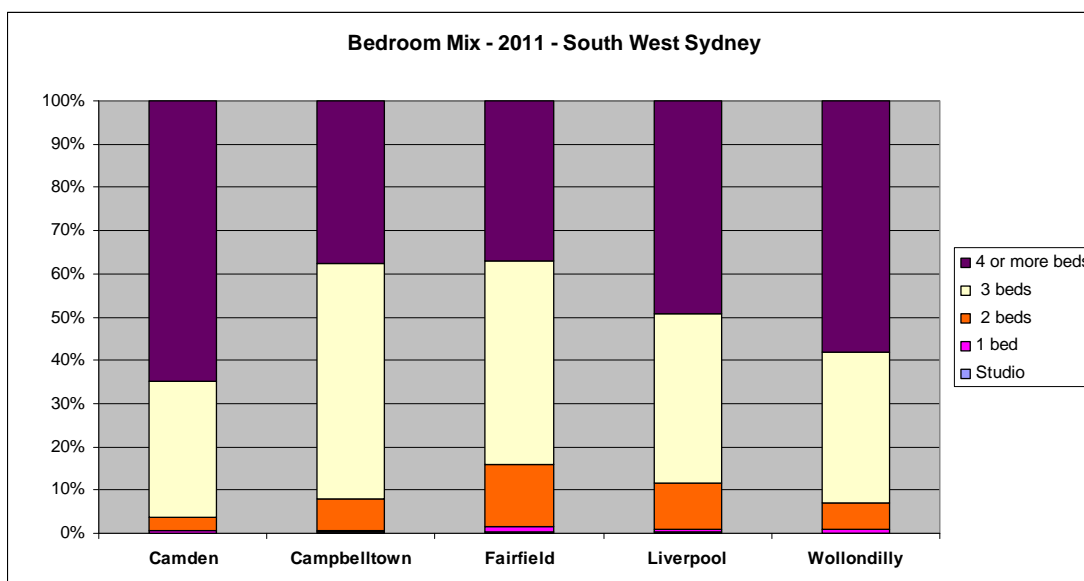


- There are small numbers of households living in caravan, cabin and houseboat accommodation in 2006 and 2011 in the South West. Over that period the number declined in Campbelltown and particularly in Liverpool, was steady in Fairfield and actually increased in Camden and Wollondilly. Caravan or residential parks are one of the few remaining affordable housing options for lower income households. The table below gives the number of key dwelling types in the South West Subregion LGAs at the 2011 Census.
- The table below shows changes in the number of flats and houses in each of the South West Sydney subregion local government areas between 2006 and 2011.

Area	Increase in Houses 2006 - 2011	Increase in attached houses	Increase in Flats 2006 - 2011	Total Increase in Dwellings 2006 - 2011	Flats as % of total increase
Camden	1,558	513	30	2,167	1.4
Campbelltown	978	-76	547	1,528	35.8
Fairfield	-225	1,896	246	1,903	12.9
Liverpool	2,029	1,519	869	4,221	20.6
Wollondilly	852	124	83	1,086	7.6
Sydney SD	20,444	25,742	52,072	95,627	54.5

Bedroom Mix

- Given the significant number of single person and couple only households, ideally there should be an increase in the number of studio, one and two bedroom dwellings. Looking to the future, with the ageing of the population in South West Sydney, this becomes more important.
- Camden and Wollondilly have actually lost studio and one bedroom stock between 2001 and 2011, while Fairfield has lost two and three bedroom stock, Campbelltown and Liverpool have lost three bedroom stock and Wollondilly has lost studio, one bed and three bedroom stock. All five LGAs have had massive growth in four bedroom dwellings.
- All five LGA's have much lower proportions of studio, one and two bedroom dwellings than the average for Sydney.
- None of the South West subregion LGAs have a good balance of bedroom mix to meet the needs of the local community, and the fit between household type and bedroom number is actually worsening over time. 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 also assisting in affordability.
- The graph below shows the proportions of studio, one, two, three and four or more bedroom dwellings at the 2011 Census in each of the South West Sydney subregion LGAs.



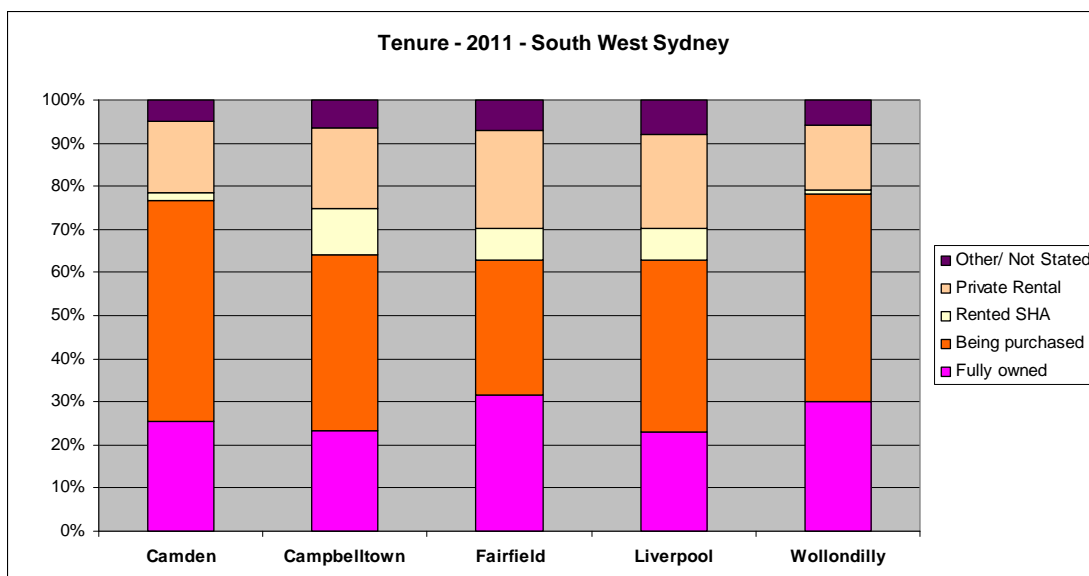
- The table below shows the change in the number of studio (0), one, two, three and four or more bedroom dwellings in each of the South West Sydney subregion local government areas between 2001 and 2011.

Change in number of bedrooms 2001 – 2011

Area	0	1	2	3	4	total
Camden	-15	-2	-28	-6	3,193	3,142
Campbelltown	37	37	296	-2,176	2,001	195
Fairfield	83	16	-202	-1,219	2,595	1,273
Liverpool	19	36	220	-482	5,335	5,128
Wollondilly	-9	-34	2	-288	1,975	1,646
Sydney SD	1,414	8,969	26,166	-3,731	84,406	117,224

Tenure

- Although the proportion of households which own their home outright combined with the proportion which are purchasing their home has not changed much over the 10 year period from 2001 to 2011, there has been a radical shift between the two tenures. There has been a dramatic decline in the proportion of households which own their home outright (falling by between 10% and 22% across the subregion, with the exception of Camden, which had a slight increase in the proportion of fully owned).
- Over the same period there have been large increases in the proportion of households purchasing their home (between 23% and 58%) and increases in private rental in all the South West LGAs (between 10% and 29%).
- There have also been increases in the proportion of private rental in each of the South West subregion LGAs. However, despite this increase, all the South West subregion LGA's have lower proportions of private rental than the Sydney average of 26% - ranging from just 15% in Wollondilly to 23% in Fairfield. The lower proportion of private rental, particularly in Wollondilly and Camden, means the local housing market is much less flexible in meeting local housing needs.
- The graph below shows the proportion of households in the key tenures at the 2011 Census in each of the South West Sydney subregion local government areas.



Public Housing

The table below shows the number of public housing properties in the South West 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
Camden	393
Campbelltown	6,034
Fairfield	4,546
Liverpool	4,858
Wollondilly	6
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 category in the South West Sydney subregion. Although Fairfield, Liverpool and Campbelltown have a higher than Sydney average provision of social housing, waiting times for general housing are 5-10 or more than 10 years in every bedroom category in the subregion.

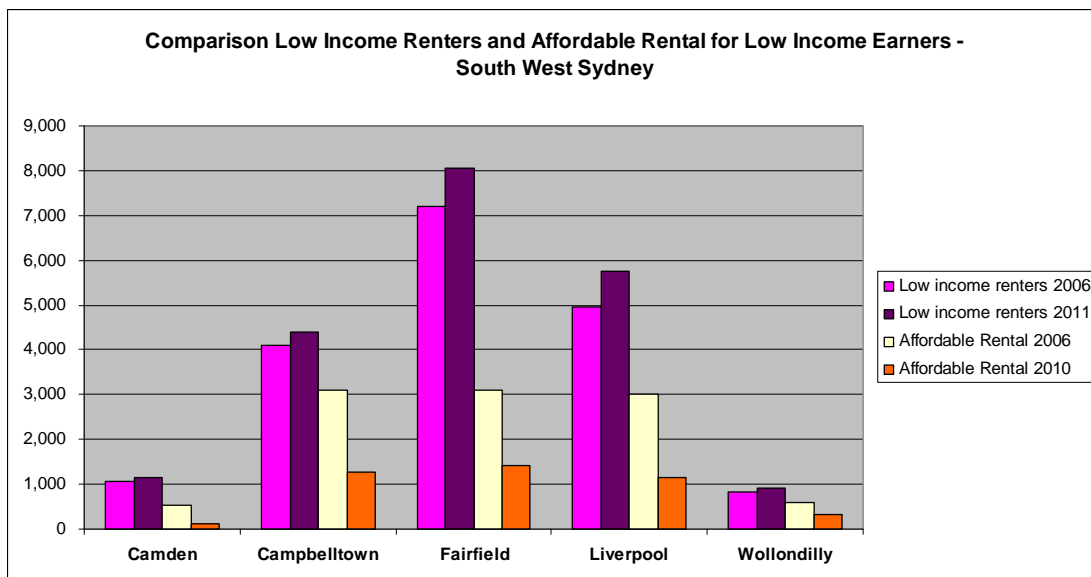
Expected Waiting Time by Table				
ALLOCATION ZONE	1 bedrm	2 bedrms	3 bedrms	4 bedrms
South Western Sydney				
GW10 FAIRFIELD	10+ years	10+ years	10+ years	10+ years
GW11 LIVERPOOL	5-10 years	10+ years	10+ years	10+ years
GW12 CAMPBELLTOWN	10+ years	5-10 years	5-10 years	10+ years
GW13 CAMDEN	5-10 years	10+ years	5-10 years	10+ years
GW14 WOLLONDILLY	10+ years	5-10 years	5-10 years	5-10 years

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

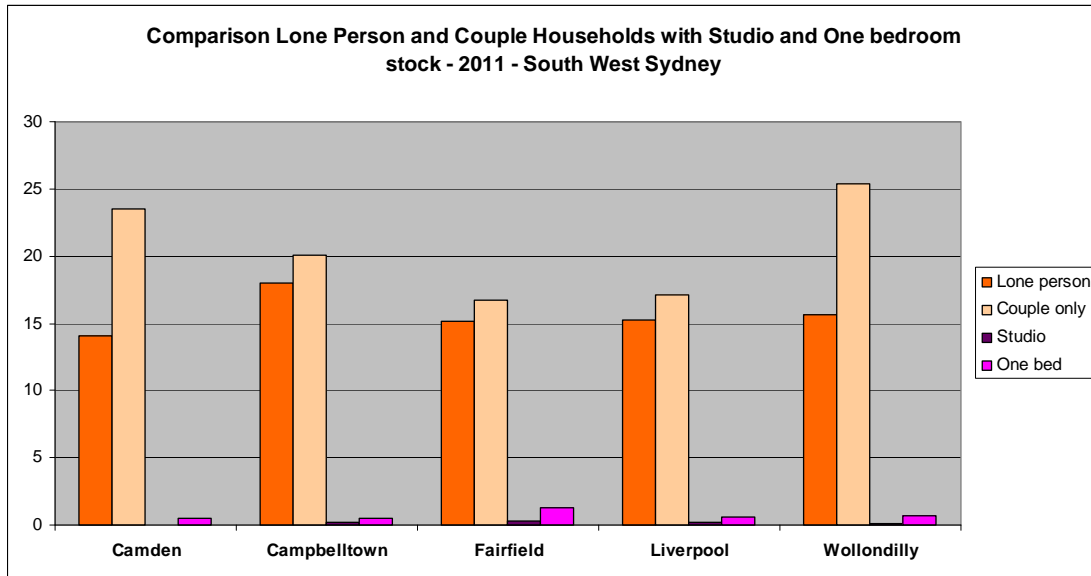
NOTE: Expected Waiting Time data is as at 31 December 2013.

The Gap

- Despite this subregion being relatively more affordable, there is a large and growing gap between the increasing number of low income earners in the private rental market and the declining number of private rental properties that are affordable for low income households.
- The predominance and growing numbers of low income households suggests that the demand for affordable housing in the South West Sydney subregion is strong and growing and has implications for availability of affordable housing into the future.
- The graph below shows the trend in growth in the number of low income renters in comparison with the trend of decline in the number of new bonds lodged which are affordable to low income renters.



- When you take into account the long term very tight vacancy rate indicating an acute undersupply of private rental, combined with the strong increase in rental levels, decline in rental affordability for lower income earners, significant loss of affordable rental properties, very high proportion of lower income households in rental stress and relatively high numbers of lower income households currently resident in the South West subregion, there is a strong argument for increasing the supply of private rental and provision of affordable housing.
- This argument has traction, given there is evidence that the Affordable Rental Housing SEPP is making inroads in the provision of affordable accommodation, particularly in Fairfield. Although this mechanism on its own is unlikely to create sufficient affordable housing to close the gap.
- None of the South West subregion LGAs have a good balance of bedroom mix to meet the needs of the local community, and the fit between household type and bedroom number is actually worsening over time. There is a very low proportion of studio, one and two bedroom stock, as the graph below shows.
- Given the significant number of single person and couple only households, ideally there should be an increase in such dwellings.
- More one and two bedroom dwellings suitable for single and couple only households would provide greater flexibility in the dwelling stock to meet the range of housing needs in the local community, including for older age groups. It may also assist in providing some more affordable housing choices.
- The graph below compares the number of lone person and couple only households with the number of studio and one bedroom dwellings in each of the South West Sydney local government areas 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/>