

Central District – What’s the housing demand?

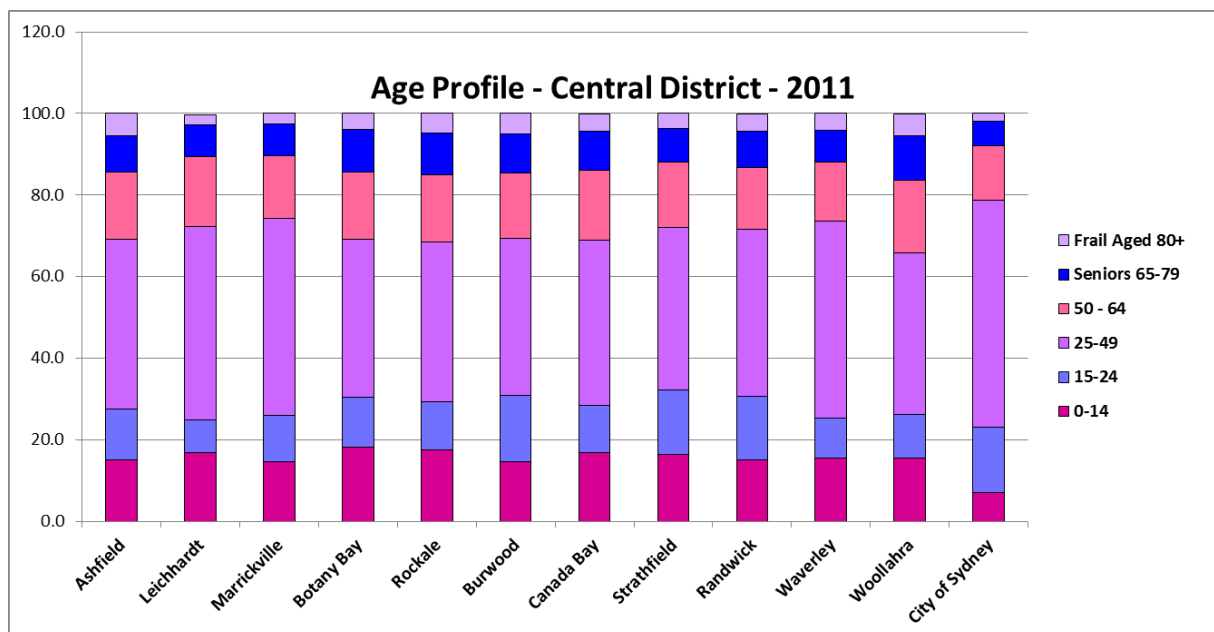
This snapshot of housing demand in the Central District takes a brief look at the age profile, housing types, household size and income across the local government areas (LGAs) which comprise the Central District. Further analysis is included in the snapshot information on the housing market and housing supply and the gap between supply and demand for the Central District.

Population and Households Increasing

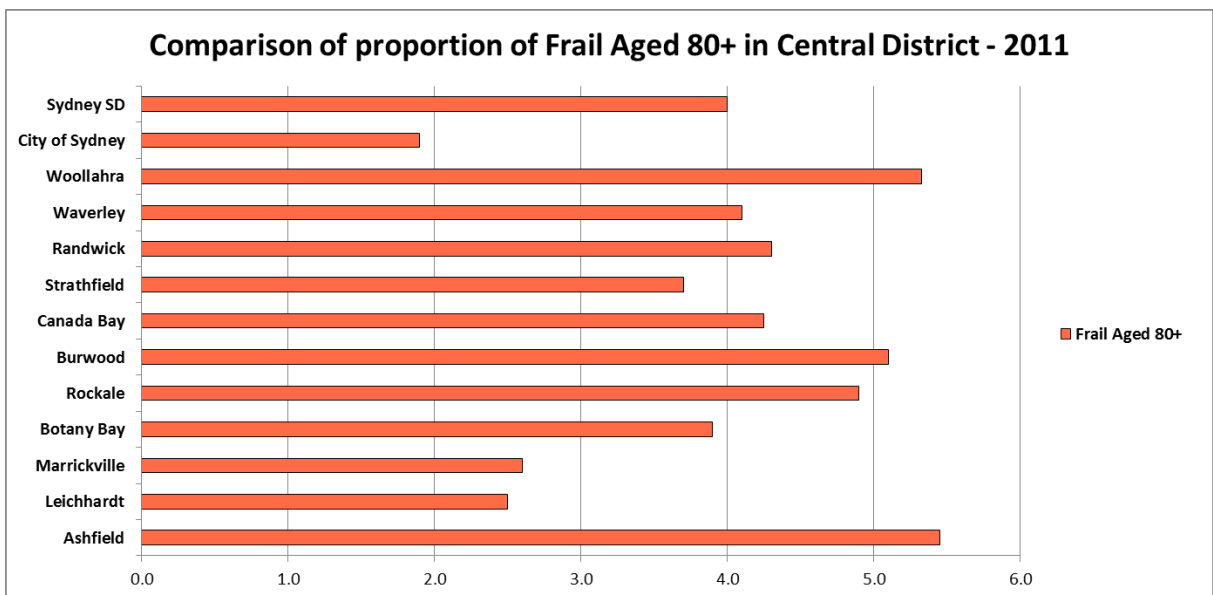
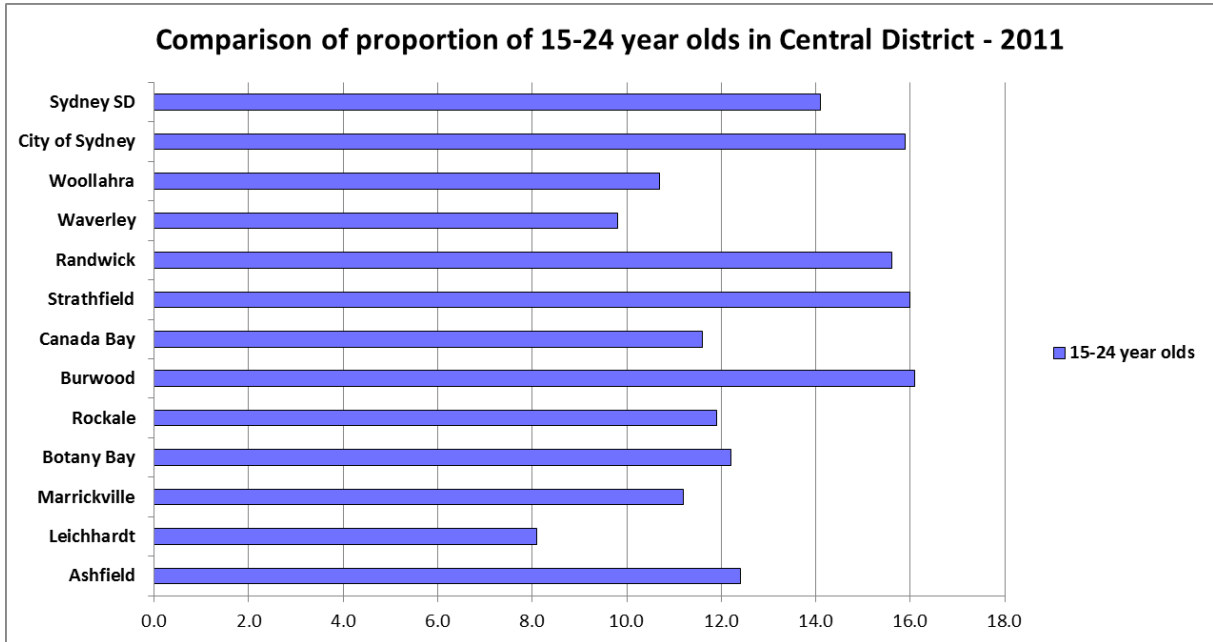
- The Department of Planning and Environment have estimated that the population of Sydney will increase by 1,575,550 between 2011 and 2031. They further estimate that this will mean an increase of 623,850 households over that time frame. The forecast for the Sydney average annual growth rate to 2031 is 1.6%.
- The DPE forecast for the Central District LGA’s average growth rate to 2031 ranges between 0.9 in Waverley and Woollahra to 2.02 in Sydney City. Sydney City, Burwood and Canada Bay are the only Central District LGAs with forecast growth rates above the Sydney average.

Age

- There is no single trend for the whole of the Central District, with some LGAs having an ageing population with an increase in median age and/ or a higher proportion of seniors and residents aged over 80 (frail aged) (Ashfield, Botany Bay, Burwood, Canada Bay, Randwick, Rockdale and Woollahra). Others have a declining median age and a lower proportion of older age groups (Leichhardt, Marrickville, Strathfield, Sydney). In addition, LGA’s with universities (or immediately adjacent to universities) have very high proportions of 15-24 year olds (Randwick, Sydney, Strathfield and Burwood). All the Central District LGAs have a much lower proportion of 0-14 year olds than the average for Sydney Statistical Division (SD), particularly City of Sydney LGA.
- The graph below shows the age cohorts for each LGA in the Central District as at the 2011 Census.



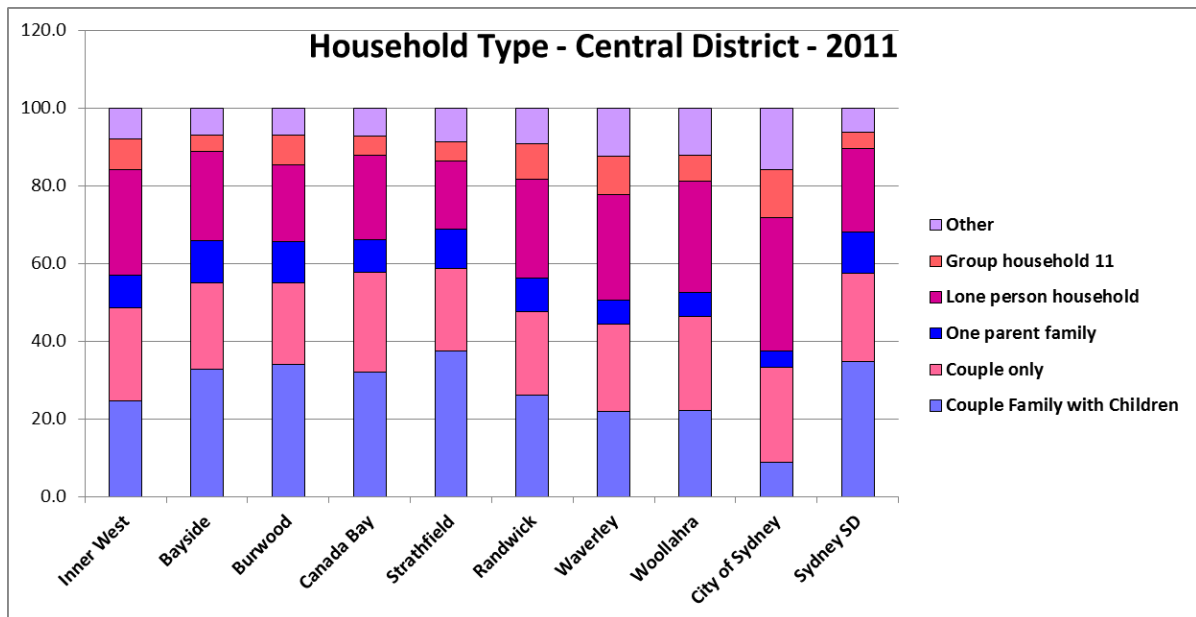
- The graphs below compare the proportions of 15-24 year olds and frail aged across the LGAs of Central District with Sydney SD.



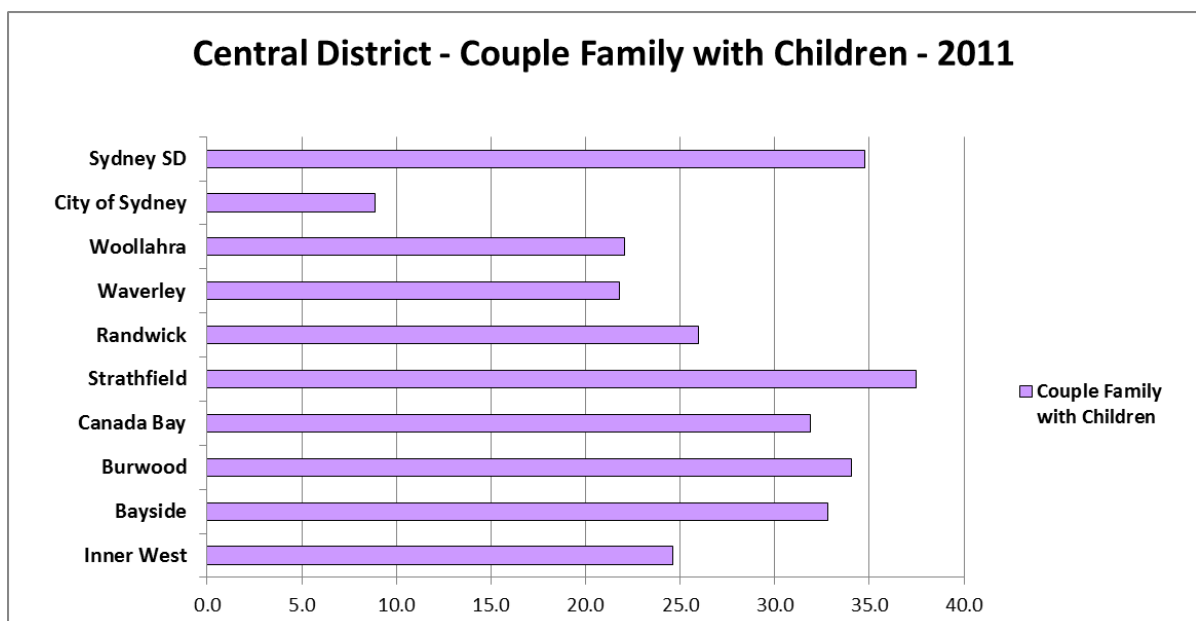
Household type

- All the Central District LGAs have a higher proportion of lone person households than the average for Sydney SD, with the exception of Strathfield and Burwood. All the Central District LGAs have a lower proportion of couple families with children, with the exception of Strathfield and they all have a lower proportion of single parent families, with the exception of Bayside. Inner West, Canada Bay, City of Sydney, Waverley and Woollahra have a higher proportion of couple only households than the average for Sydney SD. City of Sydney LGA has an extraordinarily high proportion of lone person households, with 34.3% compared to an average across Sydney SD of 21.5%.

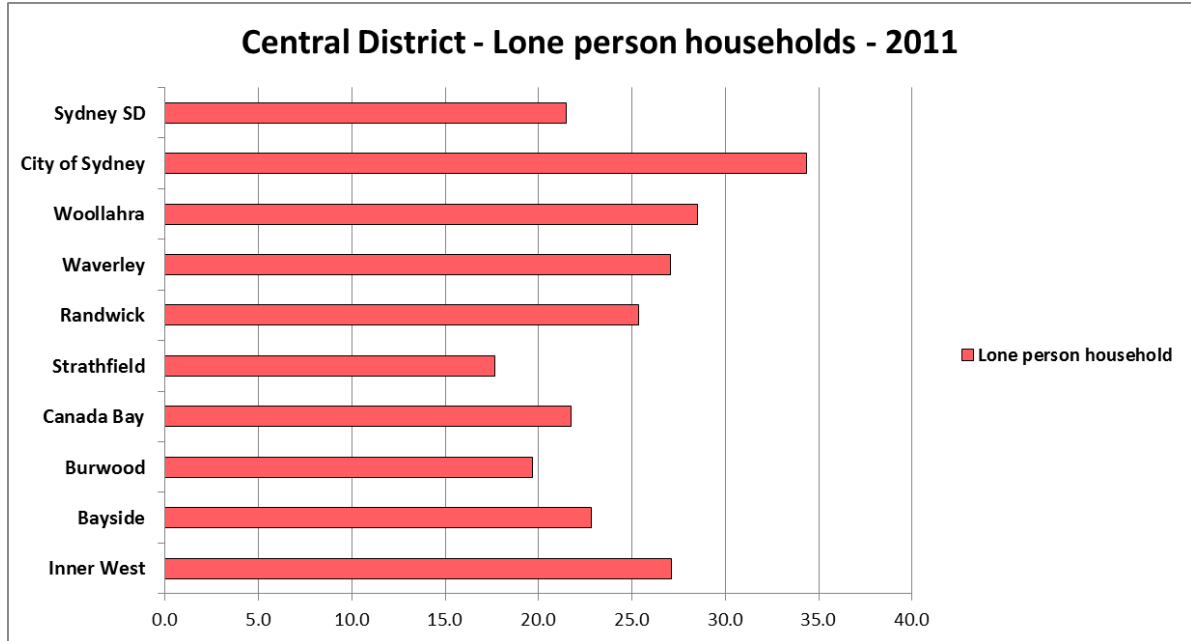
- Note that the ABS defines a group household as a household consisting of two or more unrelated people where all persons are aged 15 years and over. There are no reported couple relationships, parent-child relationships or other blood relationships in these households. The Central District has a much higher proportion of group households (8.3%) than the average for Sydney SD (4.1%).
- The graph below shows the proportion of household types for each LGA in the Central District at the 2011 Census.



- The graph below compares the proportions of couple family households across the LGAs of Central District with Sydney SD.
- Note that the Department of Planning and Environment (DPE) forecast that across most of the Central District LGAs the strongest increases will be in lone person households to 2031. For Burwood and Strathfield the strongest increases are predicted to be in couple family households.



- The graph below compares the proportions of lone person households across the LGAs of Central District with Sydney SD.



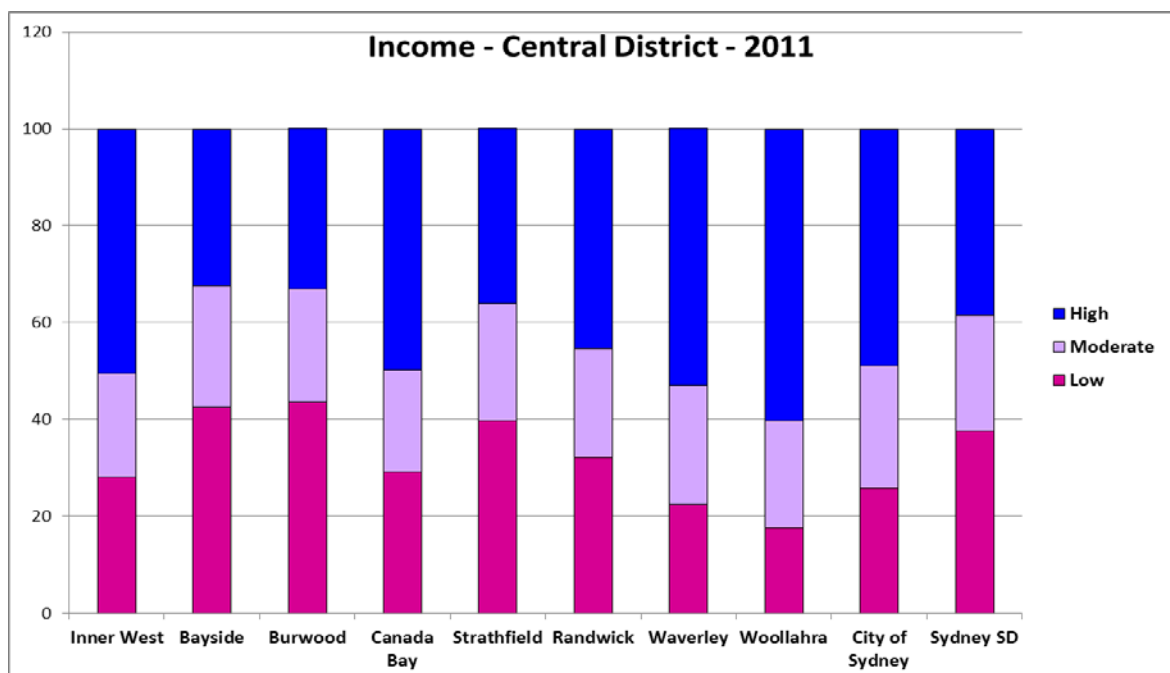
Household size

- With the exception of Burwood and Strathfield, all the LGAs in the Central District have a lower average household size, compared with the whole of Sydney SD. The table below shows the average household size for each LGA in the Central District for 1996, 2001, 2006 and 2011.

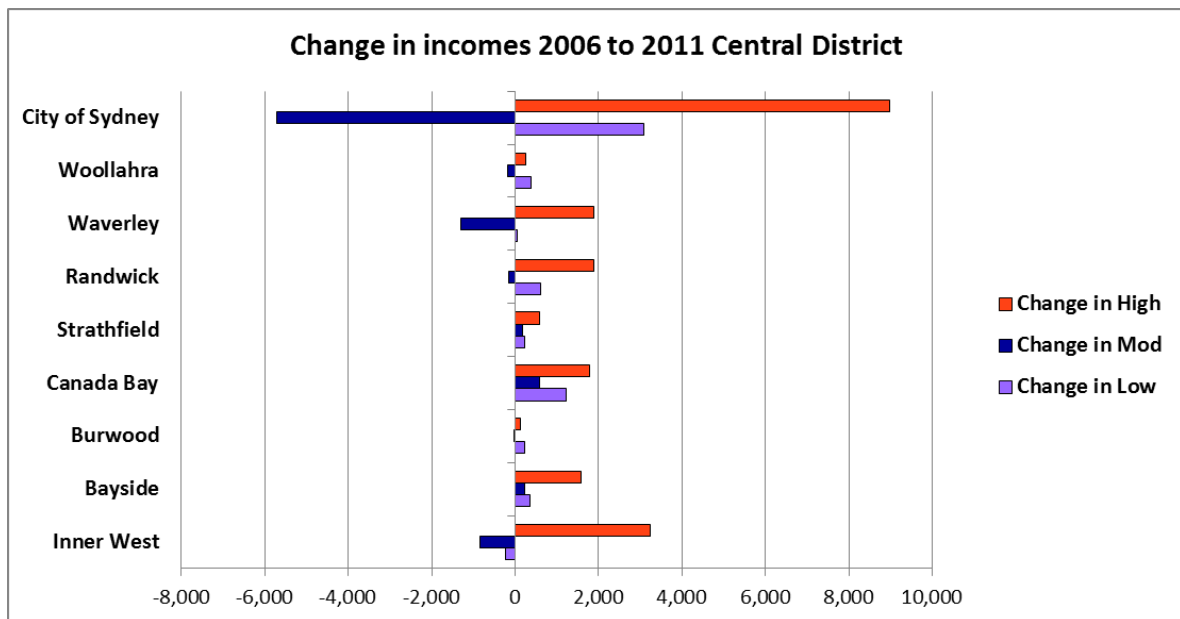
Area	Average Household Size 1996	Average Household Size 2001	Average Household Size 2006	Average Household Size 2011
Ashfield	2.50	2.40	2.40	2.50
Leichhardt	2.20	2.20	2.20	2.30
Marrickville	2.50	2.40	2.30	2.30
Botany Bay	2.70	2.70	2.60	2.60
Rockdale	2.60	2.60	2.60	2.70
Burwood	2.80	2.70	2.80	2.80
Canada Bay	2.50	2.50	2.50	2.50
Strathfield	2.90	2.90	2.90	2.90
Randwick	2.40	2.40	2.40	2.40
Waverley	2.20	2.20	2.20	2.30
Woollahra	2.10	2.20	2.20	2.30
Sydney	1.90	1.90	1.90	1.90
Sydney SD	2.70	2.70	2.70	2.70

Income

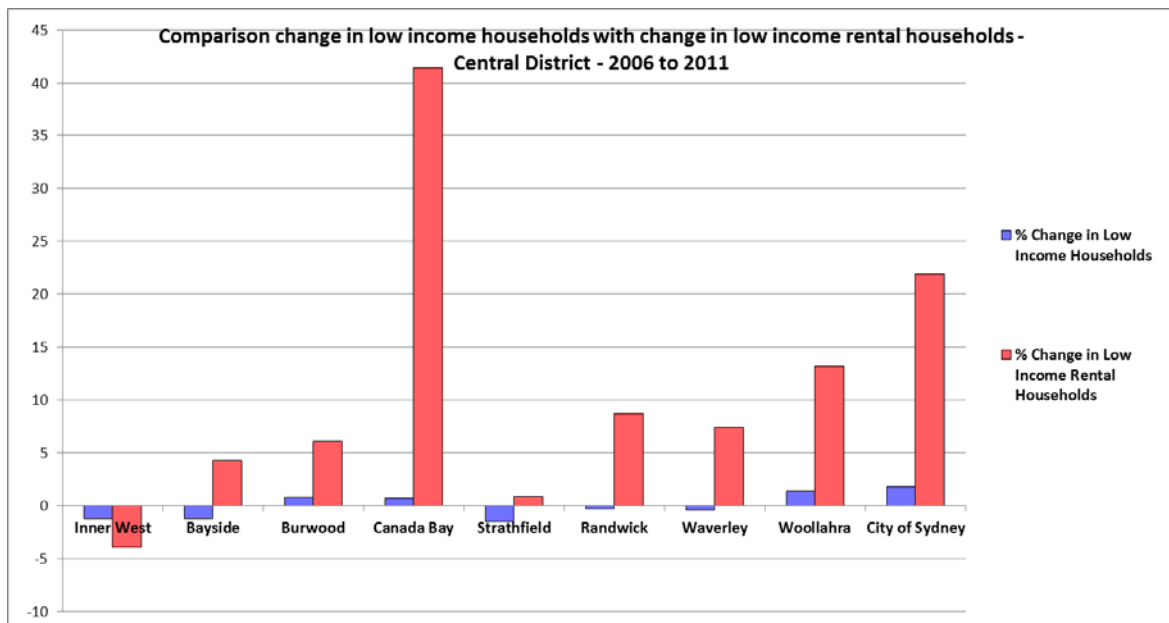
- The Central District LGAs have higher proportions of high income households than the average for Sydney SD, with the exception of Bayside, Burwood and Strathfield. These three LGAs have a higher proportion of low income households than the average for Sydney SD. Bayside, Sydney, Waverley, and Strathfield also have a higher proportion of moderate income households.
- Low and moderate income households still comprise a significant proportion of all households throughout the District and in fact in Sydney, Woollahra, Burwood and Canada Bay there has been an increase in the proportion of low income households. Every LGA except for Inner West experienced an increase in the number of low income households between 2006 and 2011. All LGAs in the Central District have a lower proportion of moderate income households and a higher proportion of higher income households than in 2006.
- All Central District LGA's (except Inner West) had an increase in the number of low income renters between 2006 and 2011. Every Central District LGA, except for Inner West, had a much stronger increase in low income rental households than in low income households over the same period.
- While moderate income households have declined generally across Sydney SD, it is noteworthy that moderate income rental households have increased across every Central District LGA. Inner West, Bayside, Burwood, Canada Bay, Randwick and Strathfield all had a larger increase in moderate income households than in moderate income rental households. Waverley, Woollahra and City of Sydney all experienced a loss of moderate income households but an increase in moderate income rental households.
- High income households have increased in every LGA in Central District and high income purchasers have been increasing at an even faster rate.
- There is evidence that there has been a significant increase in low income rental households, despite the fairly marginal increase in low income households generally across the District.
- The graph below shows the proportion of high, moderate and low income households in each LGA in the Central District at the 2011 Census.



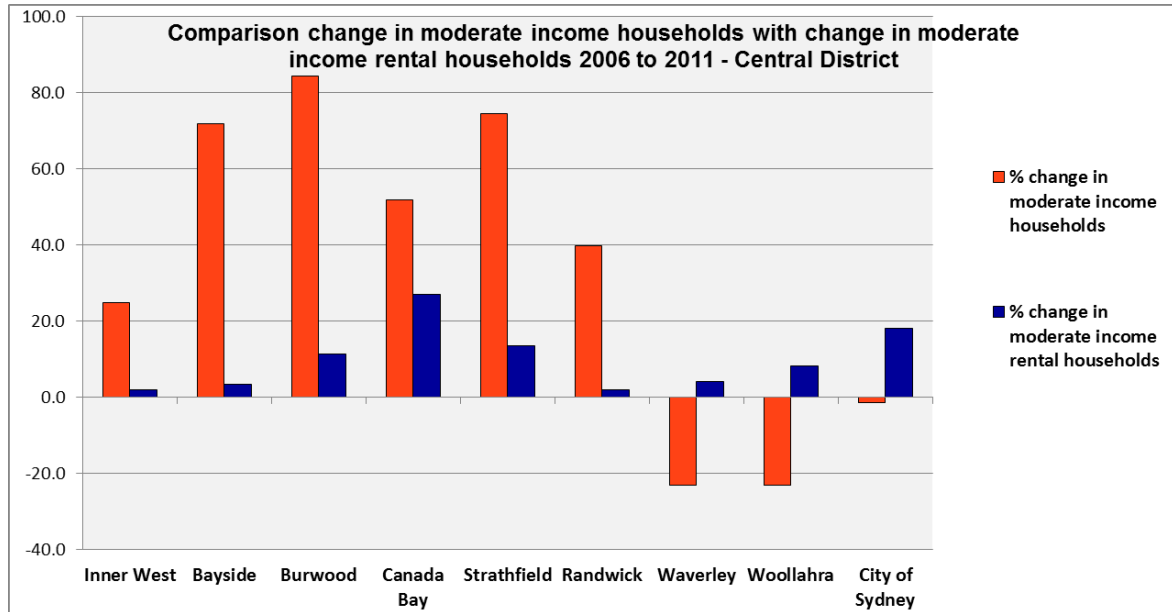
- The graph below compares the change in high, moderate and low income households across all the Central District LGAs between 2006 and 2011. The decline in moderate income households and increase in high and low income households is evident.



- The graph below compares the change in low income households with the change in low income rental households in the LGAs of Central District between 2006 and 2011. The fact that low income rental households are increasing strongly when low income households are declining or increasing marginally is clear from the graph.



- The graph below compares the change in moderate income households with the change in moderate income rental households between 2006 and 2011 in the LGAs of the Central District. The graph clearly shows the growth in moderate income rental households despite declines in moderate income households in some LGAs. It also clearly demonstrates strong growth in moderate income households across much of the Central District, against the trend in Sydney SD generally for a decline in this income group.



- This information needs to be considered along side the housing market and housing supply data and analysis to understand these trends, their impact for housing demand, what that means for housing supply, whether there are any gaps in supply and what housing is required to meet demand..

Homelessness

The table below shows the number of homeless people in each LGA in the Central District according to the 2011 Census. This is one indicator of unmet housing demand.

2011	Total Homeless
Inner West	2,005
Bayside	740
Burwood	541
Canada Bay	183
Randwick	621
Strathfield	155
Sydney	3,373
Waverley	349
Woollahra	122
Total Central District	8,089

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 detailed information and resources on an Ageing Population is available on the Local Government and Shires Association website, in the Resource for an Ageing Population:

<http://www.lgnsw.org.au/policy/ageing>

More detailed information on population, household and dwelling projections is available on the Department of Planning and Environment website at:

<http://www.planning.nsw.gov.au/en-us/deliveringhomes/populationandhouseholdprojections.aspx>

More information on homelessness is available on the Housing NSW website at:

<http://www.housing.nsw.gov.au/help-with-housing/specialist-homelessness-services>

Note that most of the data in the Housing Snapshots are taken from:

- The Local Government Housing Kit Database at <http://www.housing.nsw.gov.au/centre-for-affordable-housing/nsw-local-government-housing-kit/local-government-housing-kit-database>
- The Rent and Sales Report at <http://www.housing.nsw.gov.au/about-us/reports-plans-and-papers/rent-and-sales-reports>
- The Department of Planning and Environment population projections at <http://www.planning.nsw.gov.au/Research-and-Demography/Demography/Population-projections>