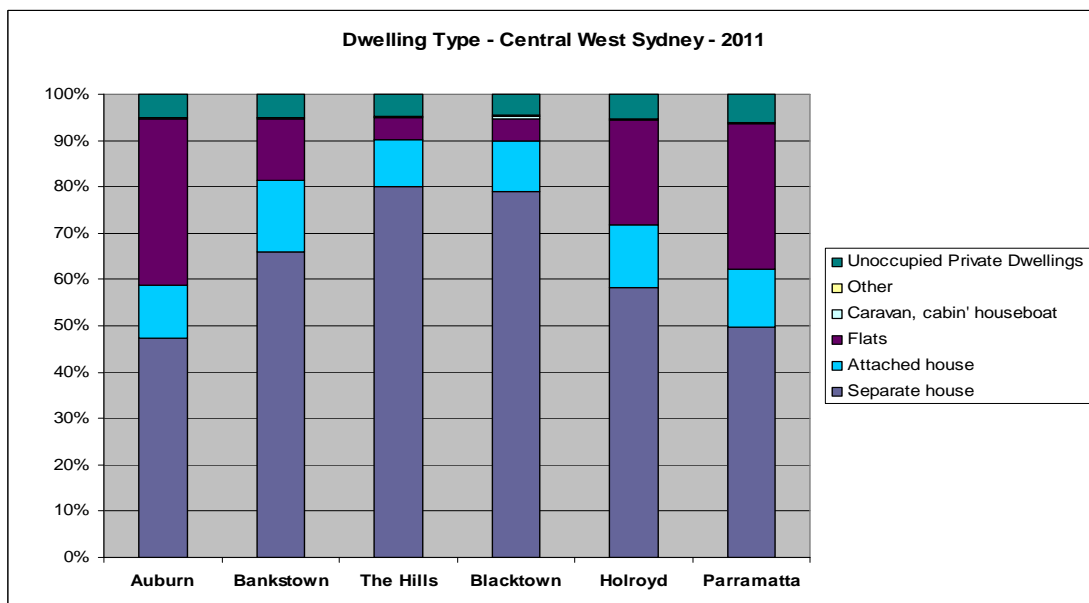


## West Central Sydney Subregion – What’s Happening with Supply and is it a good match?

### Dwelling Type

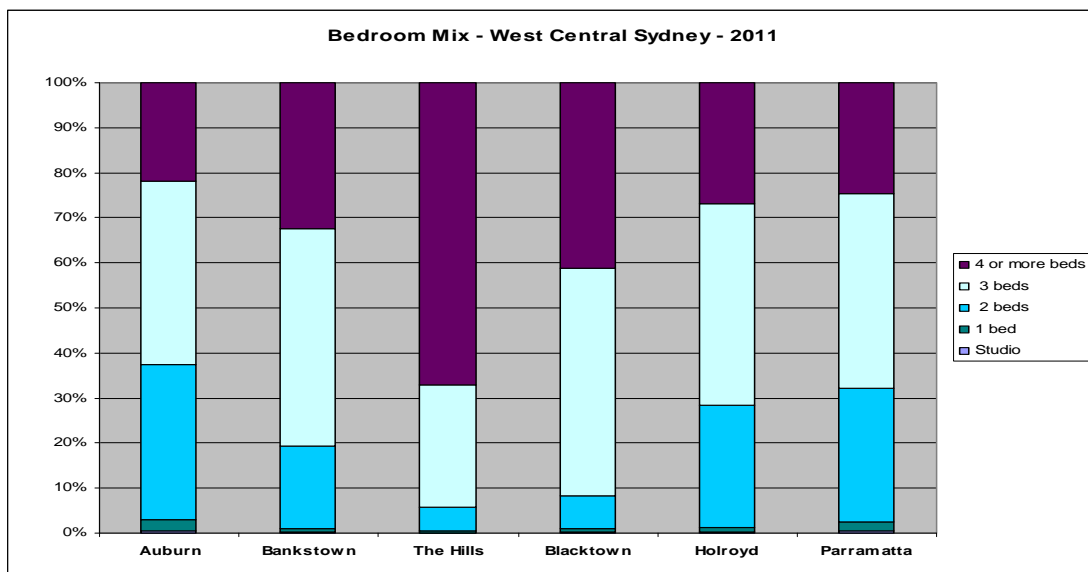
- The vast majority of dwellings in West Central Sydney are separate houses (particularly in Blacktown and The Hills, but also Bankstown), ranging from 80.1% of all dwellings in The Hills in 2011 to 47.3% in Auburn. This compares to 56.5% on average across Sydney.
- Attached houses comprise between 10.1% (The Hills) and 15.6% (Bankstown) of all dwellings, compared to 11.8% on average across Sydney.
- Flats represent between 4.8% (The Hills) and 35.8% (Auburn) compared to a Sydney average of 23.9%.
- Auburn and Parramatta have the greatest diversity of housing stock within this subregion, with the highest proportion of flats (35.8% and 31.4% respectively), and higher proportions of attached houses (Bankstown 15.6%, Holroyd 13.5%, Parramatta 12.5% and Auburn 11.5%).
- Blacktown and The Hills however, have very little diversity of stock.
- The graph below shows the proportion of key dwelling types in each of the West Central Sydney subregion local government areas as at the 2011 Census.



### Bedroom Mix

- Auburn, Parramatta and Holroyd have a reasonable mix of bedroom numbers, while The Hills, Blacktown and Bankstown do not. Bankstown lost one, two, three and four bedroom dwellings between 2001 and 2011 and The Hills lost three bedroom stock.
- In the West Central LGAs, the biggest increase over that period was in the number of four bedroom dwellings (except Parramatta, which had more two bedroom dwellings).
- All six LGA's have lower proportions of one bedroom dwellings than the average for Sydney. The Hills, Blacktown and to a lesser extent Bankstown also have much lower proportions of two bedroom and much higher proportions of three and four bedroom dwellings while Auburn, Holroyd and Parramatta have higher proportions of two bedroom stock than the Sydney average.

- Two bedroom dwellings provide greater flexibility in the dwelling stock to meet the range of housing needs in the local community, including for older age groups, as they can suit lone person, couple only and small family households.
- Given that around a third of households in each LGA in the subregion are lone person and couple only households, in Blacktown, The Hills and Bankstown the match between household type and bedroom mix is poor. More studio, one and two bedroom dwellings are required in these LGAs. For Bankstown in particular, the match between household type and bedroom mix is worsening over time as a result of the loss of one, two and three bedroom stock and massive increase of four bedroom properties – particularly with couple only and lone person households forecast to increase.
- The graph below shows the proportion of studio, one, two, three and four or more dwellings in each of the West Central Sydney local government areas at the 2011 Census.



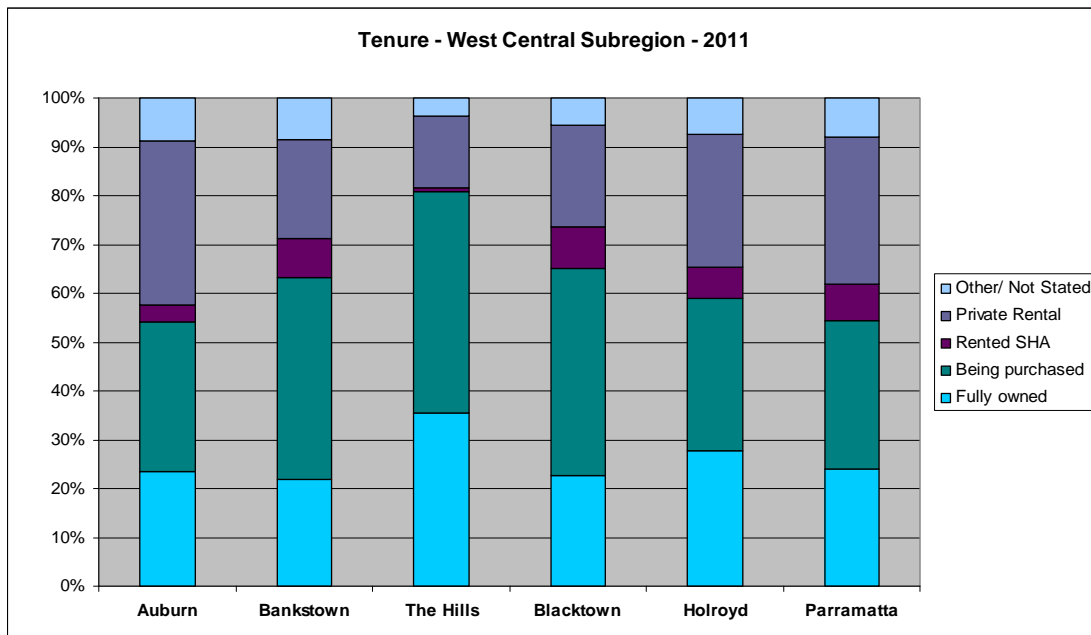
- The table below shows the numerical change in the number of studio, one, two, three and four bedroom dwellings between 2001 and 2011 in each of the West Central Sydney subregion local government areas.

Area	0	1	2	3	4	total
Auburn	73	244	1,828	1,335	1,349	4,829
Bankstown	36	-1	-326	-609	3,605	2,705
The Hills	0	56	917	581	6,838	8,392
Blacktown	62	38	1,004	-628	10,297	10,773
Holroyd	22	66	1,069	171	1,754	3,082
Parramatta	105	421	2,790	786	2,354	6,456
Sydney SD	1,414	8,969	26,166	-3,731	84,406	117,224

Note Bankstown lost one, two and three bedroom and Blacktown lost three bedroom stock between 2001 and 2011.

## 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 in West Central Sydney, there has been a substantial shift between the two tenures. There has been a significant decline in the proportion of households which own their home outright (falling by between 8% and 24%).
- Over the same period there have been large increases in the proportion of households purchasing their home (between 50% and 174%) and increases in private rental in all the West Central Sydney LGAs (ranging from 16% to 48%).
- This shift in tenure, particularly the decline in households owning their home outright and increase in purchasers and renters, is occurring across NSW. It is also evident that an increasing proportion of households are relying on the private rental market as a long term tenure, not just a transitional one between leaving home and purchasing a home.
- While The Hills (14.7%), Bankstown (20.9%) and Blacktown (20.9%) have lower proportions of private rental than the Sydney average of 26%, Auburn (33.6%), Holroyd (27.1%) and Parramatta (30.2%) have higher proportions. The lower proportion of private rental in The Hills, Bankstown and Blacktown means the local housing market is much less flexible in meeting local housing needs.
- The graph below shows the proportion of households in each key tenure type at the 2011 Census for all the local government areas in the West Central Sydney subregion.



## Public Housing

The table below shows the number of public housing properties in the West Central 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
Auburn	914
Bankstown	6,030
The Hills	385
Blacktown	8,992
Holroyd	2,468
Parramatta	5,232
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 West Central Sydney subregion. Although Bankstown, Blacktown and Parramatta have a higher than Sydney average provision of social housing, waiting times for general housing in all West Central LGA's are over five years, with most over 10 years. Note that The Hills comes under the Parramatta allocation zone.

Expected Waiting Time by Table				
ALLOCATION ZONE	1 bdrm	2 bdrms	3 bdrms	4 bdrms
<b>Western Sydney</b>				
GW1 PARRAMATTA	5 to 10 years	10 + years	10 + years	10 + years
GW2 AUBURN/GRANVILLE	10 + years	10 + years	10 + years	10 + years
GW3 BLACKTOWN	10 + years	10 + years	10 + years	5 to 10 years
GW4 MT DRUITT	5 to 10 years	5 to 10 years	5 to 10 years	10 + years
GW8 HOLROYD	10 + years	10 + years	10 + years	10 + years
<b>South Western Sydney</b>				
GW9 BANKSTOWN	5 to 10 years	10 + years	10 + years	10 + years

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.

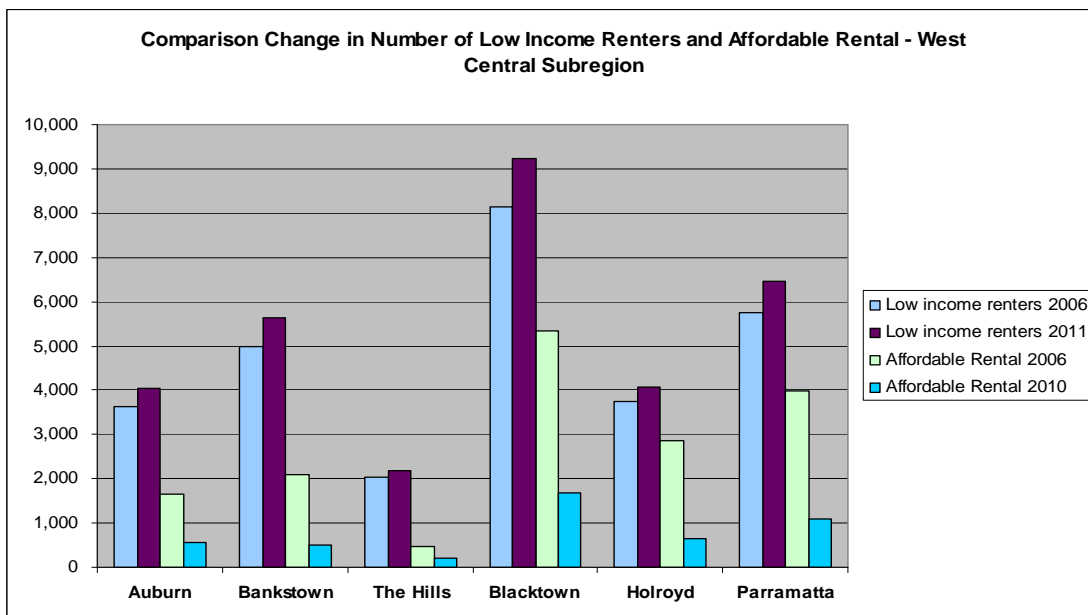
More information on Expected Waiting Times for Public Housing is available on the Housing NSW website by region at:

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

## The Gap

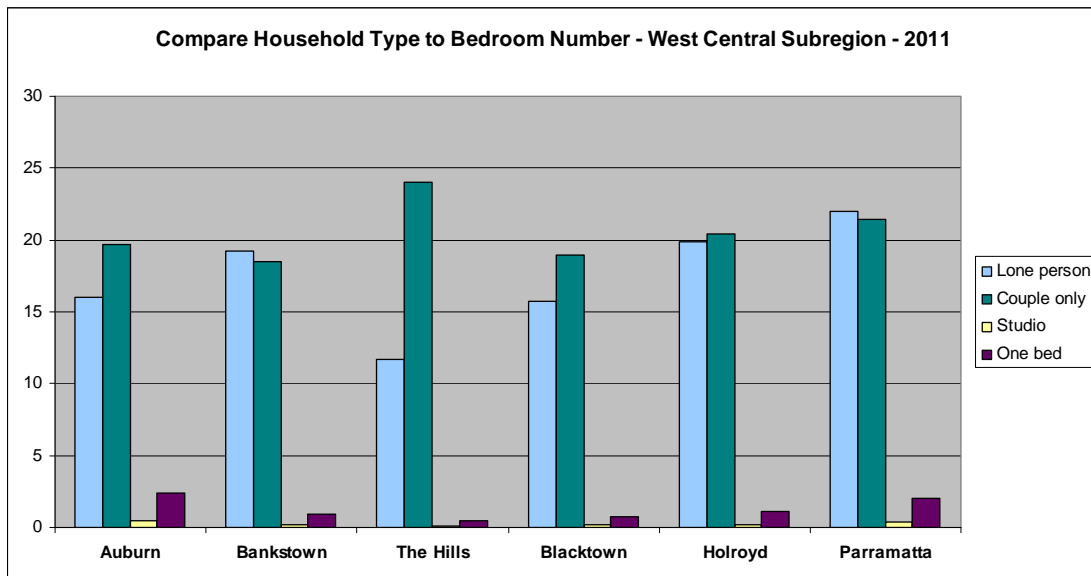
- There is a large and growing gap between the increasing number of low income earners in the private rental market and the declining number of private rental properties that are affordable for low income households.

- Bankstown, Blacktown and The Hills have a relatively low provision of private rental and there is a very clear need for more affordable rental housing in all the Central West subregion LGAs to begin to address the significant demand supply imbalance, particularly for lower income households.
- 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 bonds lodged between 2006 and 2010 for each of the West Central Sydney subregion local government areas. There is a clear upward trend showing an increase in the number of low income renters while at the same time there is a decline in the number of affordable bonds lodged – that is the number of people requiring affordable rental housing is increasing strongly while the number of affordable rental properties is declining significantly.



- While this subregion is generally a little more affordable for rental than the average for Sydney, there are still very high proportions of lower income private rental households in housing stress. The sheer numbers of people living in the private rental market, receiving rent assistance and still being in housing stress are significant.
- When you take into account the long term very tight vacancy rate indicating an 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 and lower income rental households currently resident in the West Central 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 a contribution to the provision of affordable accommodation in Bankstown and Blacktown.
- Between 2010 and 2013 both Bankstown and Blacktown experienced a slight increase in the number of affordable rental bonds. Between 2010 and 2013, Bankstown and Blacktown had a similar number of dwellings approved under the Affordable Rental Housing State Environmental Planning Policy. The vast majority of these were secondary dwellings (or granny flats). These approvals appear to have added to the stock of affordable housing and helped to stem the flow of losses in both LGAs over that short period. This suggests that the SEPP is providing much needed affordable rental housing and that it is having a positive impact.

- The SEPP on its own has not had enough of an impact in the other West Central LGA's to stem the loss of affordable housing, and therefore further measures are required to provide sufficient affordable housing to stop the loss, let alone keep pace with the growing demand.
- Bankstown, Blacktown and The Hills have a worsening match in suitability between household type and dwelling characteristics, in particular bedroom numbers, with a massive increase in four bedroom stock.
- All the Central West Sydney LGAs have insufficient studio and one bedroom stock and Blacktown, The Hills and Bankstown also have inadequate two bedroom stock to meet existing and forecast housing needs. A proactive stance is required to encourage an increase in studio, one and two bedroom properties. The latter in particular provide some flexibility, being suitable for lone person, couple only and small family households.
- Looking to the future, with the ageing of the population in West Central Sydney, this becomes more important.
- The graph below compares the number of lone person and couple only households with the number of studio and one bedroom properties in each of the West Central Sydney subregion 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/>