



Housing Audit

June 2021

CITY OF SYDNEY



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Background

The City of Sydney Housing Data Collection Framework provides a comprehensive method for the audit of all housing (building) and dwelling stock in the local area. This provides an estimate of all types of residential buildings, dwelling structure, and dwelling tenure (type). The audit of the housing and dwelling stock in the City of Sydney local area will be reported annually at the end of each financial year.

The City's Community Strategic Plan (Sustainable Sydney 2030) contains 10 strategic directions aimed at delivering a city the community wants by 2030. Strategic Direction 8 – Housing for a Diverse Population – aims for “a wider range of housing so people who provide vital city services can afford to live in the city”.

The City of Sydney local area has undergone a rapid increase in dwelling stock over the past decade, with more new dwellings due for completion in both the near and medium terms. There are currently 13,000 dwellings in the City's development pipeline, due for completion over the next five years. The Australian Bureau of Statistics (ABS) Estimated Resident Population (ERP) for the City of Sydney local area at June 2020 was 248,736 (ABS, 3218.0 - *Regional Population Growth, Australia, updated 30 March 2021*).

In the City's Community Strategic Plan (2017), Target 3 states that by 2030:

“There will be at least 138,000 dwellings in the city (including 48,000 additional dwellings compared to the June 2007 baseline) for increased diversity of household types, including greater share of families (page 23).”

The figures quoted in the Community Strategic Plan relates to private dwellings as defined by the ABS. The term private dwellings applies to all housing except for boarding houses (Class 1B and Class 3), student accommodation and residential care services (such as aged-care facilities). Private housing includes social (including public) housing, affordable rental housing and privately owned or rented housing.

The baseline (June 2007) figure for these dwellings was 89,749 private dwellings, sourced from the 2006 ABS Census of Population and Housing and the 2007 Floor Space and Employment Survey.

The Housing Audit's data is sourced from the City of Sydney Floor Space and Employment Survey (the most recent Survey was completed undertaken in 2017). Annual updates are augmented by information collected from monitoring of development statistics and changes to ownership patterns, and data gathered from housing providers. The data considers both additions (new dwellings) and subtractions (demolished dwellings, change of use) to obtain net increase and end of year totals for housing and dwellings.

The June 2021 Housing Audit provides a comprehensive data set for the assessment of all housing stock and housing types in the city.

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The Housing Audit's report annually on the following:

- The city's current dwelling stock (buildings and dwellings)
 - private dwellings
 - non-private dwellings
- number of dwellings by Village area
- building structure
- dwelling structure including net annual increase
- dwelling tenure (type) including net annual increase.

The 2021 Housing Audit also includes information on median income for City residents (Census data) and median rents (Department of Communities and Justice (formerly Housing) data).

Housing at June 2021

Building and dwelling stock

As of June 2021, it is estimated that there were 22,053 buildings in the City of Sydney local area that contain residential dwellings (either private or non-private dwellings).

Within these buildings there were a total of 136,852 residential dwellings counted.

There were 121,725 private dwellings (private ownership and rental dwellings, social (including public) housing, affordable rental housing).

There were 15,127 non-private dwellings (boarding house rooms, student accommodation rooms, residential care services).

Dwelling location, totals and net change, year to June 2021

The following tables show the numbers of private, non-private and total dwellings at June 2020 and June 2021, with net change in dwellings and percentage change in dwellings over the financial year.

Table 1. Private dwellings at 30 June 2021 by village

Village	Private Dwellings (private ownership and rental dwellings, social (including public) housing, affordable and rental housing)			
	Jun-20	Jun-21	Change	% Change
CBD and Harbour	5,776	6,026	250	4.3%
Chinatown & CBD South	9,038	9,517	479	5.3%
Crown & Baptist Streets	13,041	13,081	40	0.3%
Glebe Point Road	12,411	12,442	31	0.2%
Green Square and City South	21,344	22,490	1,146	5.4%
Harris Street	9,138	9,178	40	0.4%
King Street	10,255	10,724	469	4.6%
Macleay St & Woolloomooloo	13,064	13,064	0	0.0%
Oxford Street	10,940	10,981	41	0.4%
Redfern Street	14,012	14,222	210	1.5%
City of Sydney local area	119,019	121,725	2,706	2.3%

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Table 2. Non-private dwellings at 30 June 2021 by village.

Village	Non-private Dwellings (boarding house rooms, student accommodation rooms, residential care services)			
	Jun-20	Jun-21	Change	% Change
CBD and Harbour	7	17	10	0.0%
Chinatown & CBD South	1,477	1,477	0	0.0%
Crown & Baptist Streets	1,103	1,105	2	0.2%
Glebe Point Road	1,867	1,968	101	5.4%
Green Square and City South	19	19	0	0.0%
Harris Street	851	851	0	0.0%
King Street	3,678	3,710	32	0.9%
Macleay St & Woolloomooloo	454	454	0	0.0%
Oxford Street	1,114	1,133	19	1.7%
Redfern Street	4,087	4,393	306	7.5%
City of Sydney local area	14,657	15,127	470	3.2%

Table 3. Total dwellings (private and non-private) at 30 June 2021 by village.

Village	Total Dwellings			
	Jun-20	Jun-21	Change	% Change
CBD and Harbour	5,783	6,043	260	4.5%
Chinatown & CBD South	10,515	10,994	479	4.6%
Crown & Baptist Streets	14,144	14,186	42	0.3%
Glebe Point Road	14,278	14,410	132	0.9%
Green Square and City South	21,363	22,509	1,146	5.4%
Harris Street	9,989	10,029	40	0.4%
King Street	13,933	14,434	501	3.6%
Macleay St & Woolloomooloo	13,518	13,518	0	0.0%
Oxford Street	12,054	12,114	60	0.5%
Redfern Street	18,099	18,615	516	2.9%
City of Sydney local area	133,676	136,852	3,176	2.4%

Net increase includes the addition of completed dwellings and the subtraction of demolished or replacement dwellings. The net dwelling stock has increased in nine of the 10 village areas in the past year, with the highest proportional growth in Green Square and City South, where the net increase in total dwellings was 5.4%. The highest net growth was in Green Square and City South, with an additional 1,146 dwellings added.

The dwelling target for the Community Strategic Plan is for the city to have at least 138,000 (private) dwellings by 2030. This does not include non-private dwellings (boarding house accommodation, student accommodation or residential care services).

The baseline figure (June 2007) was 89,749 private dwellings, or 65.0% of the dwelling target for 2030. By June 2021 there were 121,725 private dwellings in the City of Sydney local area, or 88.2% of the dwelling target for 2030. There was a net increase of 2,706 private dwellings between June 2020 and June 2021. To reach the desired target by 2030, an additional 1,808 dwellings need to be completed annually. By June 2021, 66.3% of target dwellings had been added, after 60.9% of the timeframe (14 of 23 years).

The highest number of private dwellings was in the Green Square and City South village (22,490). 42.4% of the net private dwelling increase for 2020/21 occurred in the Green Square and City South village.

Redfern Street village had the highest number of non-private dwellings (4,393). Non-private dwellings in the local area increased by 3.2% between June 2020 and June 2021, up to 15,127.

Building structure

Approximately 97.7% of the building stock (22,053 total buildings) in the City of Sydney local area falls into four main types:

- terrace, town house and semi-detached buildings (78.0%)
- multi-storey apartment buildings (9.8%)
- separate (detached) houses (6.4%), and
- buildings with dwellings above shops (3.5%).

The other 2.3% of building stock comprises a mix of buildings containing residential care services, boarding house accommodation, student accommodation, or other dwelling types.

Dwelling structure

Of the 121,725 private dwellings in the City of Sydney local area at June 2021, 20,003 dwellings were terrace houses, comprising 16.4% of all private dwellings. A further 98,550 dwellings were in multi-storey apartment buildings, comprising 81.0% of all private dwellings. 96.6% of the net annual growth in private dwellings was in multi-storey apartment building flats (2,615 of 2,706 dwellings).

There were also 1,484 separate (detached) dwellings and 1,357 dwellings located above shops in the City of Sydney local area. These comprised 1.2% and 1.1% of total private dwellings respectively.

There were 205 attached/granny flats included in the separate (detached) house (24), terrace, town house and semi-detached building (173), and buildings with dwellings above shops (8) totals.

The other 331 private dwellings include caretaker's and manager's flats, converted flats or other dwellings.

Additionally, there were 15,127 non-private dwellings in the City of Sydney local area, including 3,551 boarding house rooms (23.2% of non-private dwellings), 10,937 student accommodation rooms (72.3% of non-private dwellings), and 639 other dwellings (4.2% of non-private dwellings). In 2020/21, an additional 269 student accommodation rooms and 201 boarding house rooms were added to the city's non-private dwelling stock.

During the 2020/21 financial year, there was a net increase of 3,176 (2.4%) total dwellings across the local area. The net dwelling stock increased by 2,706 private dwellings (2.2%) and 470 non-private dwellings (2.3%).

The major locations of net dwelling increases were the Green Square and City South village with 1,146 private dwellings (5.4% increase), and Chinatown and CBS South village with 479 private dwellings (5.3% increase).

Dwelling tenure

The Housing Data Collection Framework classifies each individual residential unit or residential accommodation room by its tenure type or use. The main purpose of this section is to monitor the amount of social (including public) housing, affordable rental housing, boarding house accommodation and student accommodation in the City of Sydney.

As of June 2021, there were:

- 9,705 social (including public) housing dwellings
- 1,213 affordable rental housing dwellings
- 3,551 boarding house rooms, and
- 10,937 student accommodation rooms.

The baseline figures (June 2007) were

- 9,397 social (including public) housing dwellings
- 447 affordable rental housing dwellings, and
- 2,814 student accommodation rooms.

It is estimated that the number of boarding house rooms in 2007 was approximately 1,900.

During the 2020/21 financial year, there was a net increase of 75 social (including public) housing dwellings.

There was an increase of 185 affordable rental housing dwellings in the City of Sydney local area in 2020/21 due to completion of two developments, both in Redfern Street village.

Location of net dwelling change, year to June 2021

The figure below shows the distribution of net dwelling change between June 2020 and June 2021. Significant growth areas included the eastern edge of King Street village, northern end of Chinatown and CBD South village, and the central and southern areas of Green Square and City South village.

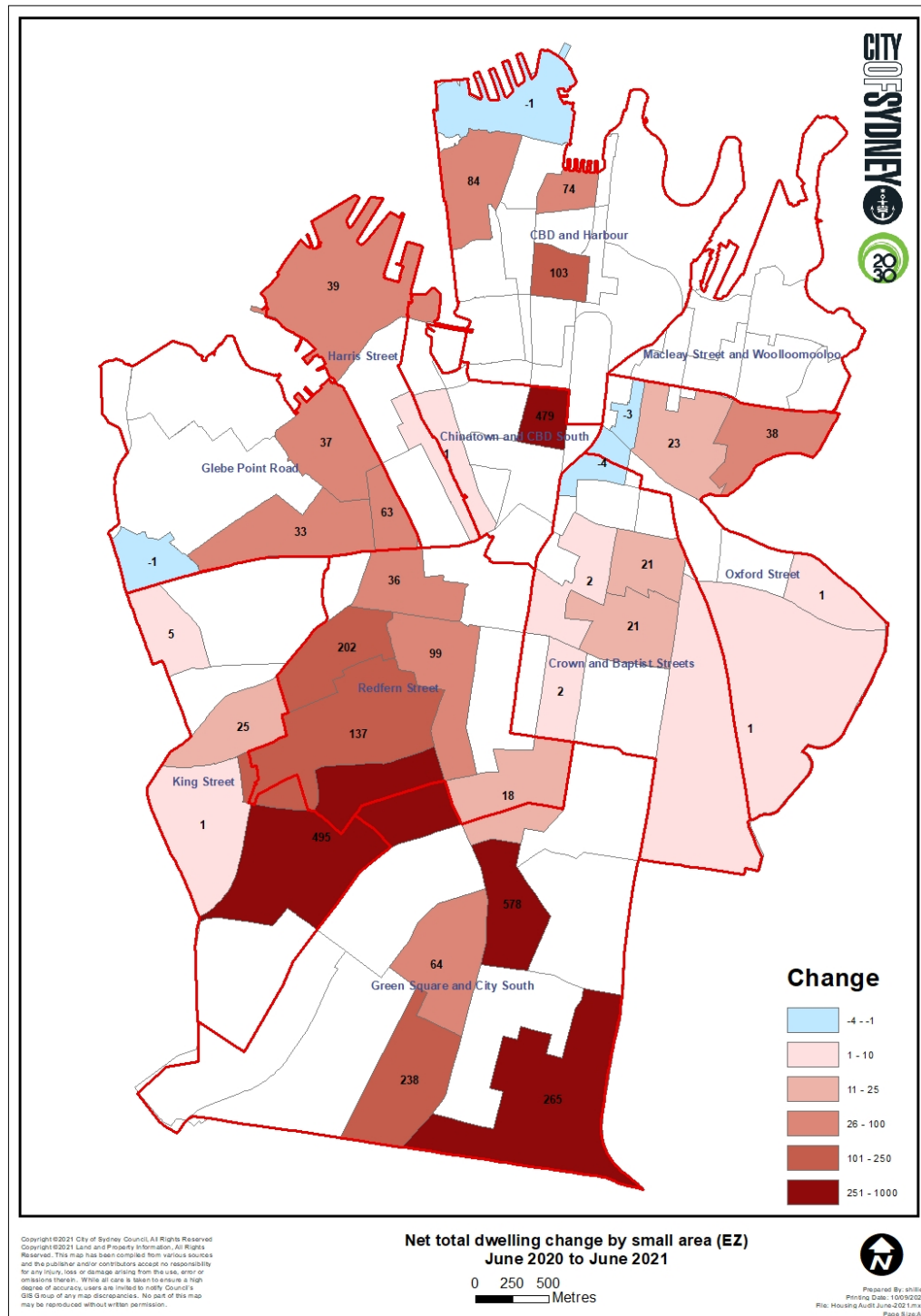


Figure 1. Distribution of net dwelling change between June 2020 and June 2021.

Additional information

The following graph shows the ABS Estimated Resident Population (ERP) for the period June 2010 to June 2020. The ERP has increased by 37.6% over this period, from 180,748 in 2010 to 245,942 in 2020.

As of June 2020, the City of Sydney local government area (LGA) was the fifth largest by population in NSW (10th in 2010 using current boundaries). The ERP was updated by the ABS on 30 March 2021. The June 2021 ERP will be released in March 2022.

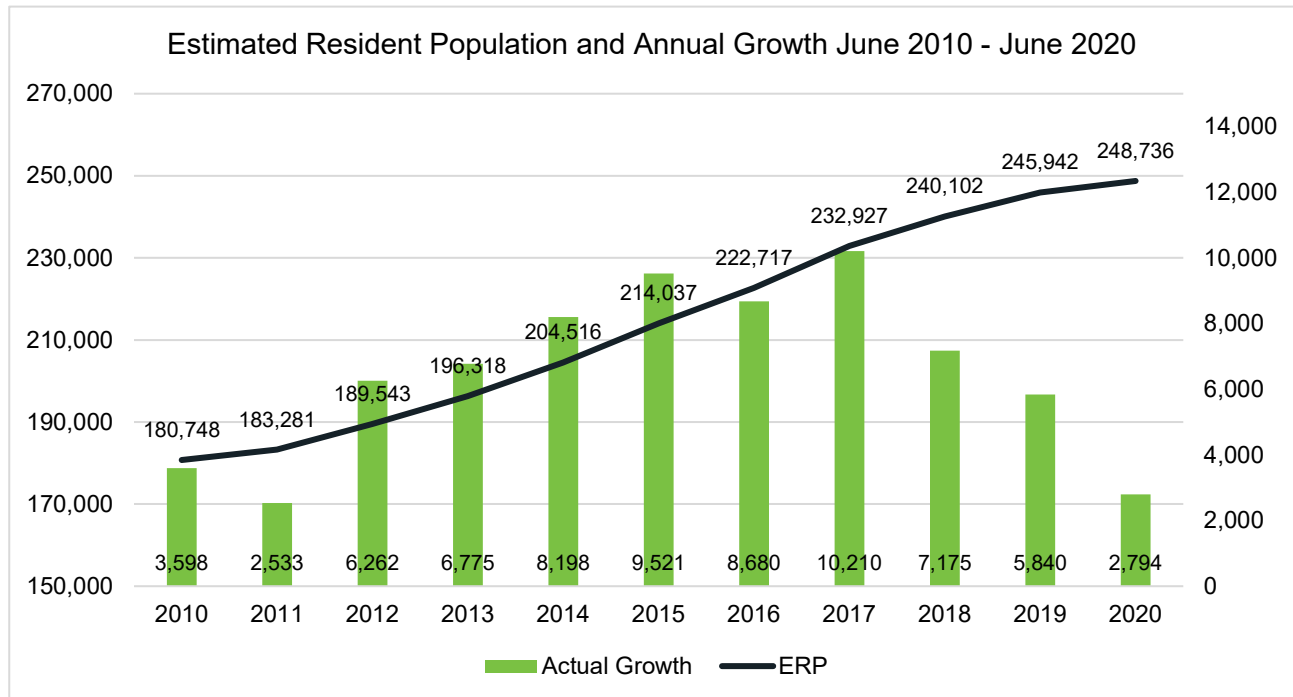


Figure 2. Estimated resident population and annual growth. Source: ABS Category No. 3218.0

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The following graph shows the four-quarter average median sale price (in \$,000s) of strata and non-strata properties for the financial years between 2010/11 and 2020/21. Over this period, the median sale prices of strata properties (predominantly units) increased by 54.7%. Non-strata properties (predominantly terrace houses or separate dwellings) increased by 94.9%.

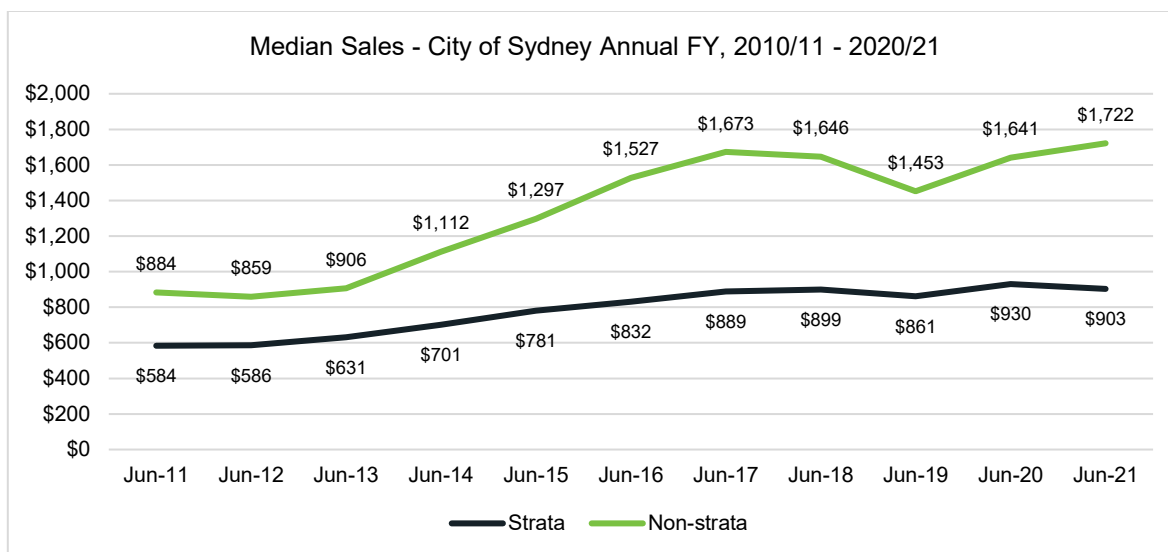


Figure 3. Median sale price, City of Sydney. Source: NSW Department of Communities and Justice, Rent and Sales Report (Issues 93-136)

The following graph shows the median rental price (four-quarter average) for new rental bonds of (two-bedroom) units and townhouses for the financial years between 2010/11 and 2020/21. Over this period, the median rental price of (two-bedroom) units increased by 11.6%. Rental prices for (two-bedroom) townhouses increased by 18.7%. Both median rental prices have been decreasing over the past two years.

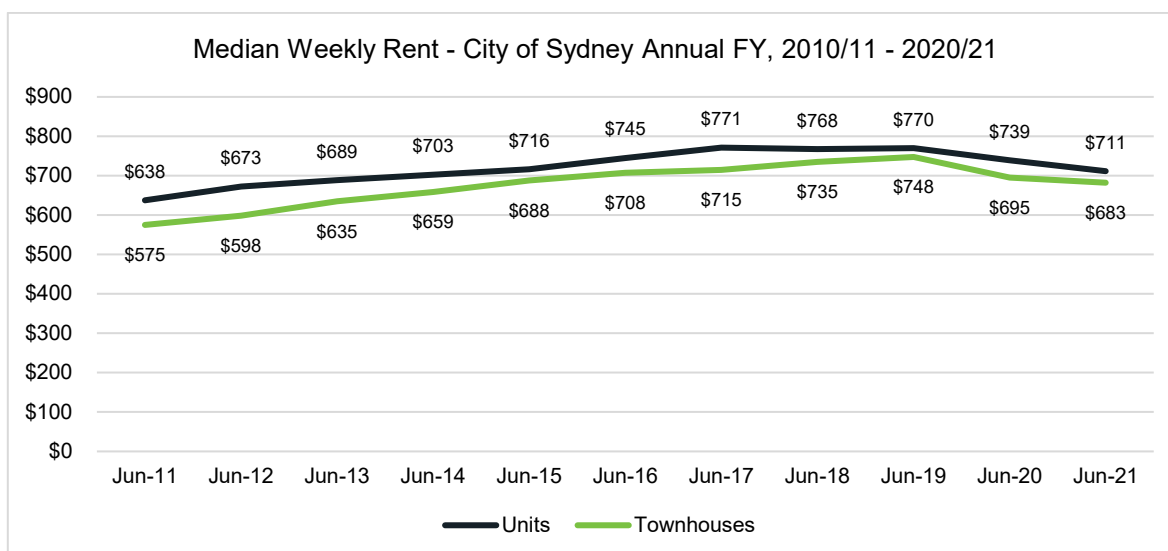


Figure 4. Median weekly rent, City of Sydney. Source: NSW Department of Communities and Justice, Rent and Sales Report (Issues 93-136)

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The following graph shows the median household income for households in the City of Sydney LGA. The data is sourced from the 2001, 2006, 2011 and 2016 ABS Census of Population and Housing. Between the 2006 and 2016 Census collections, the median household income increased by 54.3%. This data will be updated in 2022 with the release of the 2021 Census data.

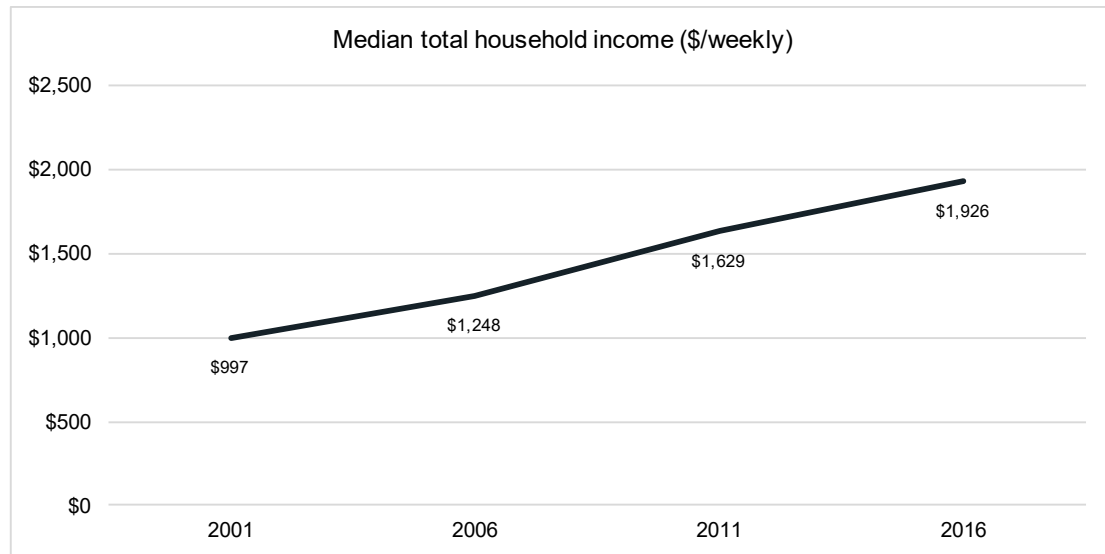


Figure 5. Median total household income. Source: ABS Census of Population and Housing 2001, 2006, 2011, 2016.

Further information

Additional information relating to residential activity in the City of Sydney local area can be found in the Residential Monitor at:

<https://www.cityofsydney.nsw.gov.au/surveys-case-studies-reports/city-monitor-reports>

Information relating to City of Sydney local area residents from the 2016 Census and forecasts of future residential growth can be found at the following link:

<https://www.cityofsydney.nsw.gov.au/council-governance-administration/community-profile>

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