Housing Audit

June 2019

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 and 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. According to the Department of Planning & Environment, the population of the city is projected to reach 292,350 by 2031, and over 315,000 by 2036. The Australian bureau of Statistics (ABS) Estimated Resident Population (ERP) for the City of Sydney local area at June 2018 was 240,229 (*Australian Bureau of Statistics, 3218.0 - Regional Population Growth, Australia, updated 27 March 2019*).

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 Australian Bureau of Statistics (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 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 takes into account 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 2019 Housing Audit provides a comprehensive data set for the assessment of all housing stock and housing types in the city.

Housing Audit

The Housing Audits 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 type (tenure) including net annual increase.

The 2019 Housing Audit also includes information on median income for city residents (Census data) and median rents (Department of Housing data).

Housing at June 2019

Building and dwelling stock

As of June 2019, it is estimated that there were 21,908 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 130,988 residential dwellings counted.

There were 116,544 private dwellings (private ownership and rental dwellings, social (including public) housing, affordable rental housing).

There were 14,444 non-private dwellings (boarding house rooms, student accommodation rooms, residential care services).

Dwelling location, totals and net change year to June 2019

The following tables show the numbers of private, non-private and total dwellings at June 2018 and June 2019, with net change in dwellings and percentage change in dwellings over the financial year.

Table 1. Private dwellings at 30 June 2019 by village

Village	Private Dwellings (private ownership and rental dwellings, social (including public) housing, affordable and rental housing)			
	Jun-18	**Jun-19**	**Change**	**% Change**
CBD and Harbour	5,302	5,651	349	6.6%
Chinatown & CBD South	7,933	9,038	1,105	13.9%
Crown & Baptist Streets	12,880	12,928	48	0.4%
Glebe Point Road	11,687	11,987	300	2.6%
Green Square and City South	17,902	20,139	2,237	12.5%
Harris Street	8,887	8,892	5	0.1%
King Street	9,752	9,959	207	2.1%
Macleay St & Woolloomooloo	12,828	13,057	229	1.8%
Oxford Street	10,866	10,925	59	0.5%
Redfern Street	13,375	13,968	593	4.4%
City of Sydney local area	**111,412**	**116,544**	**5,132**	**4.6%**

Table 2. Non-private dwellings at 30 June 2019 by village.

Village	Non-private Dwellings (boarding house rooms, student accommodation rooms, residential care services)			
	Jun-18	Jun-19	Change	% Change
CBD and Harbour	0	0	0	0.0%
Chinatown & CBD South	957	1,477	520	54.3%
Crown & Baptist Streets	1,044	1,070	26	2.5%
Glebe Point Road	1,851	1,867	16	0.9%
Green Square and City South	19	19	0	0.0%
Harris Street	851	851	0	0.0%
King Street	3,538	3,547	9	0.3%
Macleay St & Woolloomooloo	435	454	19	4.4%
Oxford Street	1,071	1,072	1	0.1%
Redfern Street	3,421	4,087	666	19.5%
City of Sydney local area	**13,187**	**14,444**	**1,257**	**9.5%**

Table 3. Total dwellings (private and non-private) at 30 June 2019 by village.

Village	Total Dwellings			
	Jun-18	**Jun-19**	**Change**	**% Change**
CBD and Harbour	5,302	5,651	349	6.6%
Chinatown & CBD South	8,890	10,515	1,625	18.3%
Crown & Baptist Streets	13,924	13,998	74	0.5%
Glebe Point Road	13,538	13,854	316	2.3%
Green Square and City South	17,921	20,158	2,237	12.5%
Harris Street	9,738	9,743	5	0.1%
King Street	13,290	13,506	216	1.6%
Macleay St & Woolloomooloo	13,263	13,511	248	1.9%
Oxford Street	11,937	11,997	60	0.5%
Redfern Street	16,796	18,055	1,259	7.5%
City of Sydney local area	**124,599**	**130,988**	**6,389**	**5.1%**

Net increase includes the addition of completed dwellings and the subtraction of demolished or replacement dwellings. The net dwelling stock has increased in all ten village areas in the past year, with the highest proportional growth in Chinatown and CBD South, where the net increase in total dwellings was 18.3%. The highest net growth was in Green Square and City South, with an additional 2,237 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 boarding house accommodation, student accommodation or residential care services (non-private dwellings).

The baseline figure (June 2007) was 89,749 private dwellings, or 65.0% of the dwelling target for 2030. By June 2019 there were 116,544 private dwellings in the City of Sydney local area, or 84.5% of the dwelling target for 2030. There was a net increase of 5,132 private dwellings between June 2018 and June 2019. To reach the desired target by 2030, an additional 1,951 dwellings need to be completed annually. By June 2019, 55.5% of target dwellings had been added, after 52.2% of the timeframe (12 of 23 years).

The highest number of private dwellings was located in the Green Square and City South village (20,139). 43.6% of the net private dwelling increase for 2018/19 occurred in the Green Square and City South village.

Redfern Street village had the highest number of non-private dwellings (4,087). Non-private dwellings in the local area increased by 9.5% between June 2018 and June 2019, up to 14,444.

Building structure

Approximately 97.8% of the building stock (21,907 buildings) in the City of Sydney local area falls into four main types:

– terrace, town house and semi-detached buildings (78.2%),

– multi-storey apartment buildings (9.6%),

– separate (detached) houses (6.5%), and

– buildings with dwellings above shops (3.5%).

The other 2.2% 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 116,544 private dwellings in the City of Sydney local area at June 2019, 19,865 dwellings were terrace houses, comprising 17.0% of all private dwellings. A further 93,517 dwellings were in multi-storey apartment buildings, comprising 80.2% of all private dwellings. 98.1% of the net annual growth in private dwellings was in multi-storey apartment building flats (4,744 of 5,034 dwellings).

There were also 1,480 separate (detached) dwellings and 1,366 dwellings located above shops in the City of Sydney local area. These comprised 1.3% and 1.2% of total private dwellings respectively.

The other 316 private dwellings include caretaker's and manager's flats, converted flats or other dwellings.

Additionally, there were 14,444 non-private dwellings in the City of Sydney local area, including 3,310 boarding house rooms (22.9% of non-private dwellings), 10,537 student accommodation rooms (73.0% of non-private dwellings), and 642 other non-private dwellings (4.1% of non-private dwellings). In 2018/19, an additional 1,185 student accommodation rooms and 53 boarding house rooms were added to the city's non-private dwelling stock.

During the 2018/19 financial year, there was a net increase of 6,389 (5.1%) total dwellings across the local area. The net dwelling stock increased by 5,132 private dwellings (4.6%) and 1,257 non-private dwellings (9.5%).

The major locations of net dwelling increases were the Green Square and City South village with 2,237 private dwellings (12.5% increase), and Redfern Street village with 666 non-private dwellings (19.5% 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 2019 there were:

– 9,630 social (including public) housing dwellings,

– 854 affordable rental housing dwellings,

– 3,310 boarding house rooms, and

– 10,537 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 2017/18 financial year, there was a net increase (179 dwellings) in the total number of social (including public) housing dwellings, due in part to the completion of social housing developments in the Glebe Point Road village.

At June 2019 social (including public) housing dwellings comprised 8.2% of private dwellings in the city.

There was no change to the number of affordable rental housing dwellings in the City of Sydney local area in 2018/19.

At June 2019 affordable rental housing dwellings comprised 0.7% of private dwellings in the city.

Location of net dwelling change, year to June 2019

The figure below shows the distribution of net dwelling change between June 2018 and June 2019. Significant growth areas included the southern half of Chinatown and CBD South village (associated with completed developments at Darling quarter), the northern half of Redfern Street village (Sydney Central Park) and The north and eastern areas of Green Square and City South village.
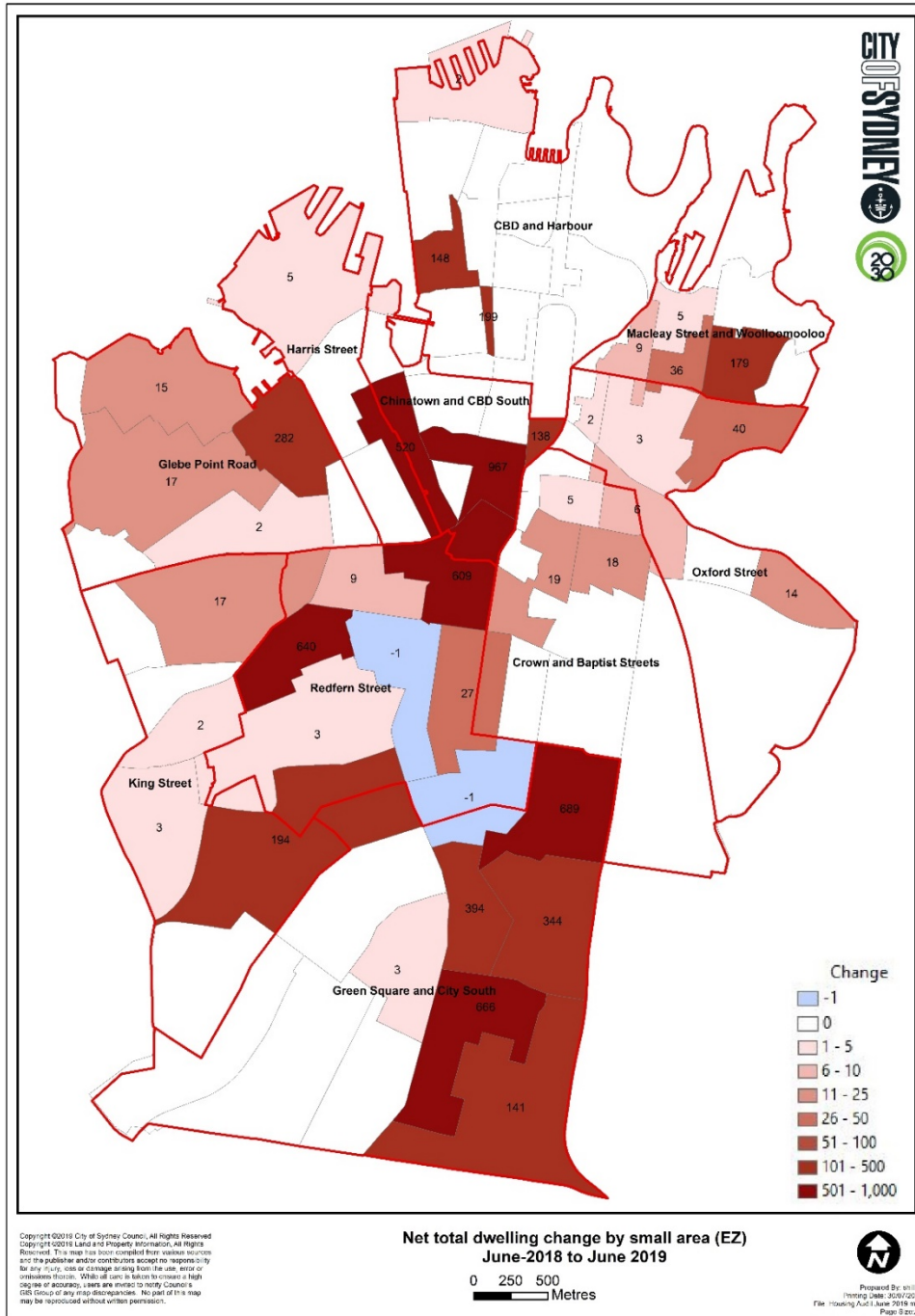

Figure 1. Distribution of net dwelling change between June 2018 and June 2019

Additional information

The following graph shows the ABS Estimated Resident Population (ERP) for the period June 2008 to June 2018. The ERP has increased by 38.9% over this period, from 172,985 in 2008 to 240,229 in 2018.

As of June 2018, the City of Sydney LGA was the sixth largest by population in NSW (12th in 2008 using current boundaries). The ERP was updated by the ABS on 27 March 2019. The June 2019 Estimated Resident Population will be released in March 2020.
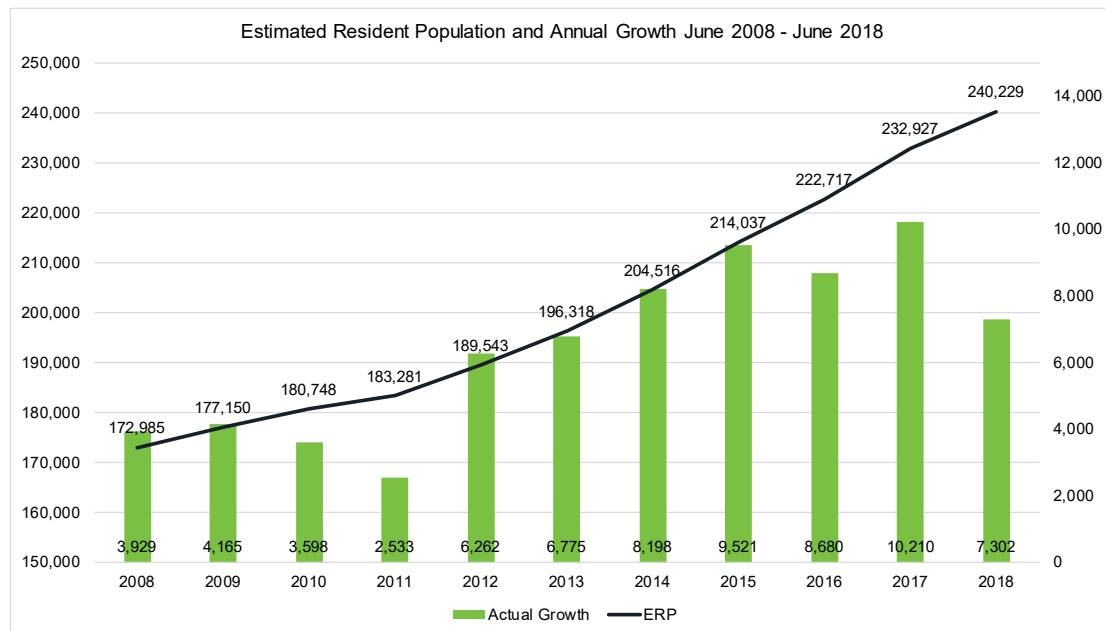
Figure 2. Estimated resident population and annual growth. Source: *ABS Category No. 3218.0*

The following graph shows the median sales price (in $,000s) of strata and non-strata properties for the financial years between 2008 and 2018. Over this period, the median sales prices of strata properties (predominantly units) increased by 86.9%. Non-strata properties (predominantly terrace houses or separate dwellings) increased by 133.5%.
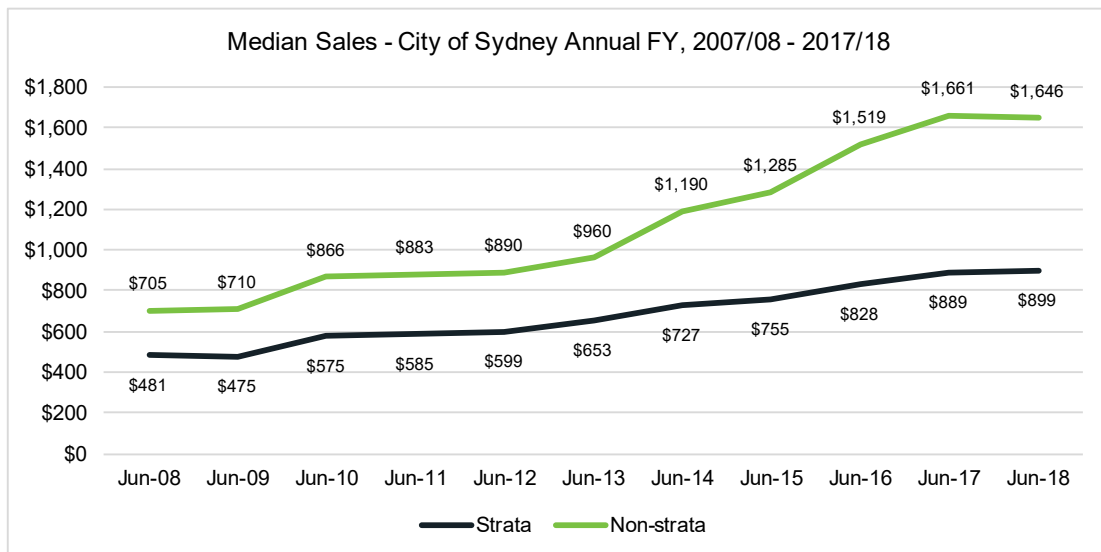
Figure 3. Median weekly rent, City of Sydney. Source: *NSW FACS Rent and Sales Report (Issues 82-125)*

The following graph shows the median rental price of (two-bedroom) units and houses for the financial years between 2008 and 2018. Over this period, the median rental price of (two-bedroom) units increased by 42.1%. Rental prices for (two-bedroom) houses increased by 58.4%.
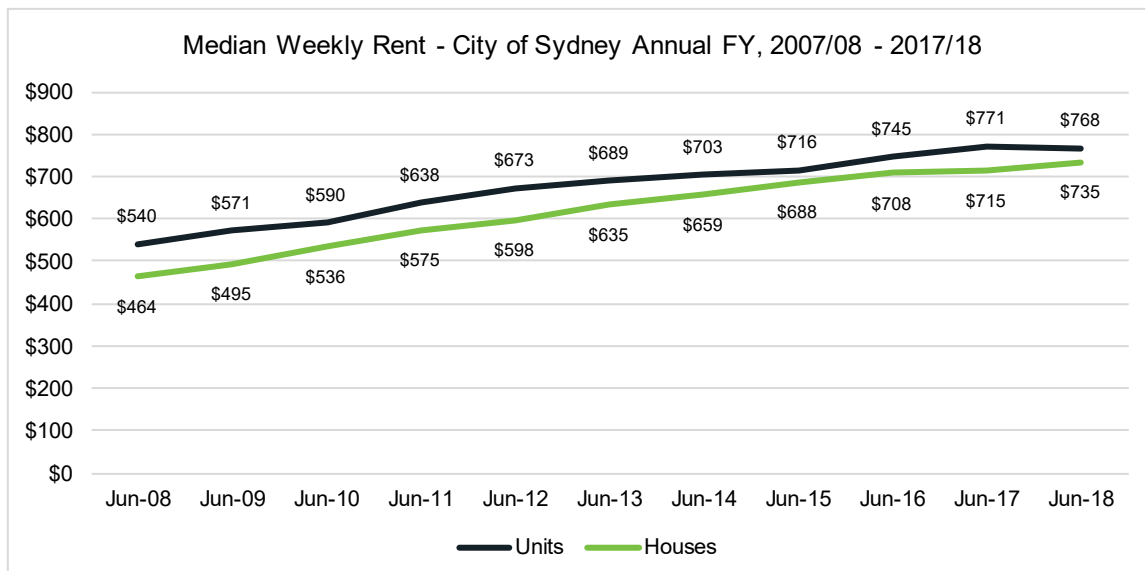
Figure 4. Median weekly rent in the City of Sydney. Source: *NSW FACS Rent and Sales Report (Issues 81-124)*

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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 last decade), the median household income increased by 54.3%.
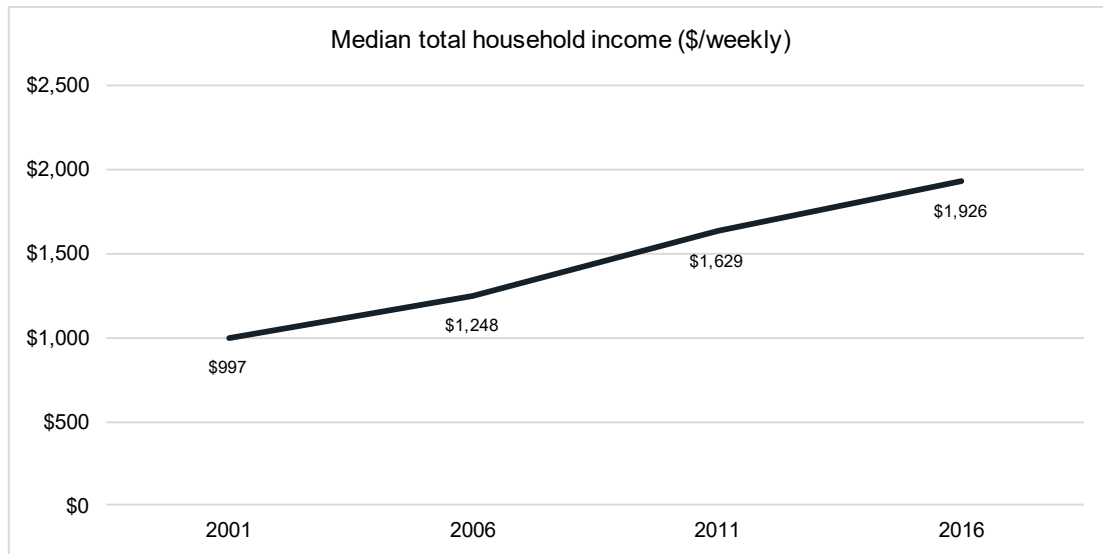
Median total household income ($/weekly)

$2,500	
$2,000	
$1,500	$1,926
$1,000	$1,629
$500	$1,248
$0	$997

2001   2006   2011   2016

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;

http://www.cityofsydney.nsw.gov.au/learn/research-and-statistics/city-monitors

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;

http://www.cityofsydney.nsw.gov.au/learn/research-and-statistics/profiling-our-community

Last updated: 4 November 2020