wentworth community housing

western sydney community forum

HOME IN WESTERN SYDNEY

Housing Affordability and Homelessness Insights

April 2019

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The growth of Western Sydney is continuing at a rapid pace. In the coming decades, Western Sydney will support significantly more people, homes and jobs. It is an exciting – and challenging – time to be involved in the housing sector and the communities of Western Sydney. Despite a recent slight easing in house prices and rents, housing affordability is still a significant issue. While there is an increase in prosperity there is also an alarming trend of a rise in the number of people experiencing homelessness. Demand on our homelessness services has increased dramatically over the last three years. We know from our work in Western Sydney that secure, appropriate and affordable housing can turn lives around. It provides the foundation for social and economic inclusion in our communities. Governments and communities need to work together to reinvigorate our social housing system in NSW and significantly increase the supply of affordable housing. We have a moral responsibility to ensure that everyone has a home.

Access to safe, affordable and appropriate housing is a fundamental human need and right. We know that a lack of stable and secure housing has far reaching social and economic costs that affect individuals, families and whole communities. As the regional peak that leads and shapes social policy and service delivery, Western Sydney Community Forum has joined with Wentworth Community Housing to place a spotlight on the region and draw out the key messages that evidence a shifting landscape of housing and homelessness. In essence, the gap is widening, the region unequivocally bears a disproportionate level of housing stress, and the myth of Western Sydney as an affordable place to live is relative and a false dichotomy. To prevent further social polarisation, this disparity must be addressed through public policy and genuine investment where it is most needed. The context of extraordinary regional growth and change makes this urgent – and therein lies the opportunity.

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Setting the scene

There have been multiple studies that analyse housing affordability and homelessness from diverse perspectives across Australia and NSW. There is also emerging industry research that drills down to Western Sydney. This paper complements this work and focuses on drawing out the key themes from several critical data sets. These data sets were identified by the joint project team through a co-design process.

A comparative analysis across local government areas was completed to ascertain key trends that impact strategic decision making. Several datasets are sourced from .id group, as presented in profile.id and atlas.id online. Data relating to resident population, household income and housing and rental stress, summarised in profile.id and atlas.id, are based on the Australian Bureau of Statistics (ABS), Census of Population and Housing 2016 (Census). The benefit of using profile.id is that it sources and summarises a range of Census tables to explore a select topic. Furthermore, all councils across Western Sydney provide demographic information through this platform. In combination, this enables rapid access and consistent comparison across the region.

Planning NSW projections take into account findings from the 2011 Census of Population and Housing, final rebased and recast Estimated Resident Populations, published by the Australian Bureau of Statistics and the latest information about births, deaths and migration. The population projections are based on assumptions of the best assessment of likely future trends and are considered to be the most reliable data available.

Drawing on the data sets, visual elements were utilised to enable the easy identification of trends. Local government area profiles were also compiled to provide at a glance insights.

Current and projected unmet social housing demand data has been sourced from reports produced by SGS Economics & Planning in late 2018 for the NSW Community Housing Industry Association NSW and Wentworth Community Housing. Demand for social and affordable housing has been classified by three cohorts:

- Households in moderate rental stress, (i.e. low income and spending between 30% and 50% of their income on rent) or severe rental stress (i.e. low income and spending greater than 50% of their income on rent)
- Homeless households, who in 2016 (Census night), were outside the private market for dwellings
- Households residing in social housing. These households are both in need of, and being provided with social and affordable housing, and are therefore a component of total demand.

The Western Sydney region for the purposes of this paper is defined as the local government areas of:

- Blacktown
- Blue Mountains
- Camden
- Campbelltown
- Canterbury Bankstown
- Cumberland
- Fairfield
- Hawkesbury
- Liverpool
- Parramatta
- Penrith
- The Hills
- Wollondilly

Canterbury Bankstown local government area has been included in this paper, where data is available, on the basis that a significant portion of the local population continue to identify as being located within the Western Sydney regional landscape and cannot be excluded. Furthermore, relevant state and commonwealth agency boundaries, in the main, continue to capture this portion of the local government area in policy making and service delivery. Finally, this paper's focus is at the local government area level rather than on smaller areas, and separating the Western Sydney portion is not practical or feasible.

It is important to note that there are limitations in the data relating to council amalgamation in 2016, which affected areas in Western Sydney. As a result, data was incomplete in some areas including for the Canterbury Bankstown, Cumberland and Parramatta local government areas.

What we know

More than **110,000** households are in housing stress

32.8 percent of renting households are in **rental stress**

Rental costs **increased at a higher rate** than incomes, with most areas showing a **higher price to income gap** than Greater Sydney

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Homelessness **increased significantly** since **2011**, at a far **greater rate** than the state and national increases

The current **social and affordable housing** supply only met **40.6** percent of the total demand

Almost **6,500 additional social and affordable housing dwellings** are needed per year to meet the forecast demand in 2036

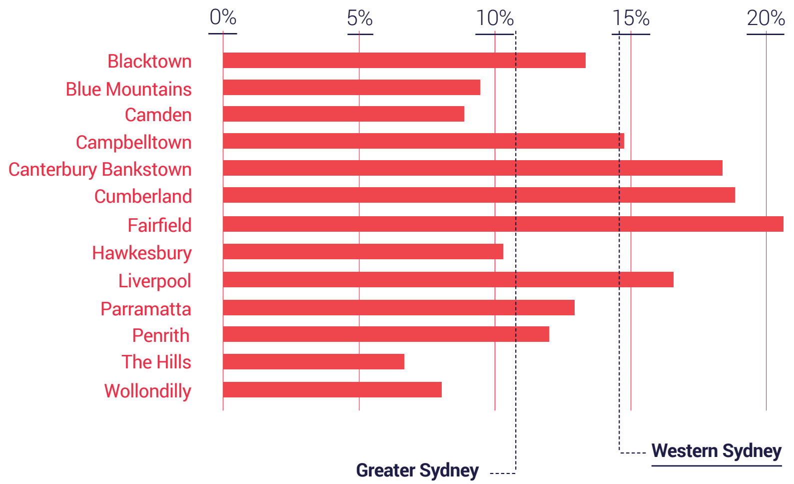
Home sale prices grew at a **faster rate** than Greater Sydney overall from **2013** to **2018**

Rate of housing stress in 2016

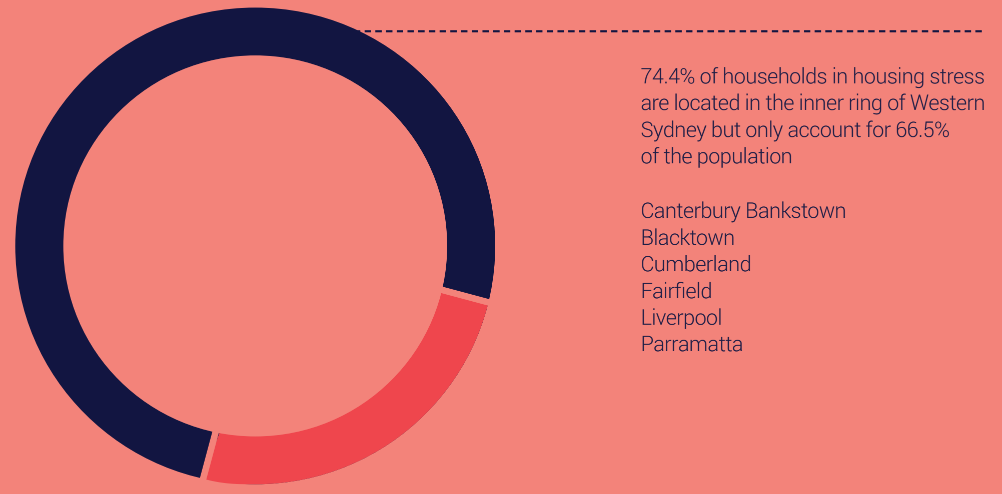
Local government area	Number of households experiencing housing stress	Percentage of households experiencing housing stress
Blacktown	14,290	13.5%
Blue Mountains	2,874	9.6%
Camden	2,248	9.0%
Campbelltown	7,873	15.0%
Canterbury Bankstown	21,164	18.6%
Cumberland	12,949	19.1%
Fairfield	12,469	20.9%
Hawkesbury	2,365	10.5%
Liverpool	10,541	16.8%
Parramatta	10,537	13.1%
Penrith	8,152	12.2%
The Hills	3,335	6.8%
Wollondilly	1,299	8.2%
Total	**110,096**	**14.6%**
Greater Sydney	**203,683**	**11.8%**

Source: profile.id, 2017

Percentage of households experiencing housing stress in 2016



More than **110,000** households are in housing stress



Western Sydney overall had a higher rate of housing stress at 14.6 percent compared to Greater Sydney at 11.8 percent.

Housing stress was experienced by more than 110,000 households across Western Sydney in 2016. This represents over 54 percent of Greater Sydney's almost 204,000 households.

Canterbury Bankstown local government area had the highest number of households experiencing housing stress in the region with over 21,000.

Eight local government areas across Western Sydney had rates of housing stress that exceeded Greater Sydney's overall rate, with five of these also exceeding the Western Sydney rate. Fairfield local government area had nearly double the rate of housing stress of Greater Sydney.

32.8 percent of renting households are in **rental stress**

In Western Sydney, more than 75,000 households experienced rental stress in 2016, an increase from just over 60,000 in 2011. During this period, Western Sydney experienced a 6.1 percent increase in the proportion of households experiencing rental stress, which is notably higher than the overall Greater Sydney increase of 5.2 percent.

Of the additional 25,000 households who experienced rental stress in Greater Sydney, over 15,000 were located in Western Sydney, representing 60 percent of the overall increase. While this shift may be due to population growth across the region, it is nonetheless noteworthy. If this trend were to continue, there is a risk that the disproportionate number of households in rental stress in Western Sydney will be compounded.

A higher proportion of renting households in Western Sydney experienced rental stress at 32.8 percent compared to 26.4 percent in Greater Sydney.

In 2016, Canterbury Bankstown local government area continued to have the highest number of households experiencing rental stress, while Fairfield, Blue Mountains, Cumberland and Liverpool local government areas had high proportions relative to population. In terms of rate of change, Liverpool, Fairfield and Campbelltown local government areas faced the highest increase in households experiencing rental stress from 2011 to 2016.

While Camden and Parramatta local government areas saw a decrease in the rate of rental stress from 2011 to 2016, there was an increase in the number of households experiencing rental stress. The decrease in rate is likely to be the result of population growth during this period, which had the effect of reducing the proportion of households in rental stress while increasing the number overall.

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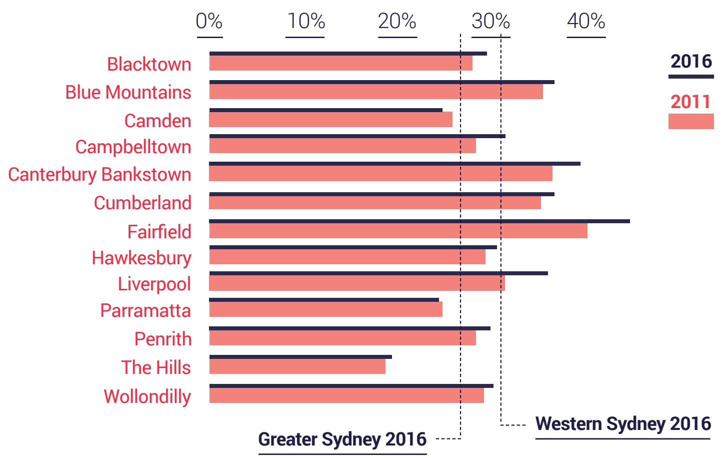
Rental stress

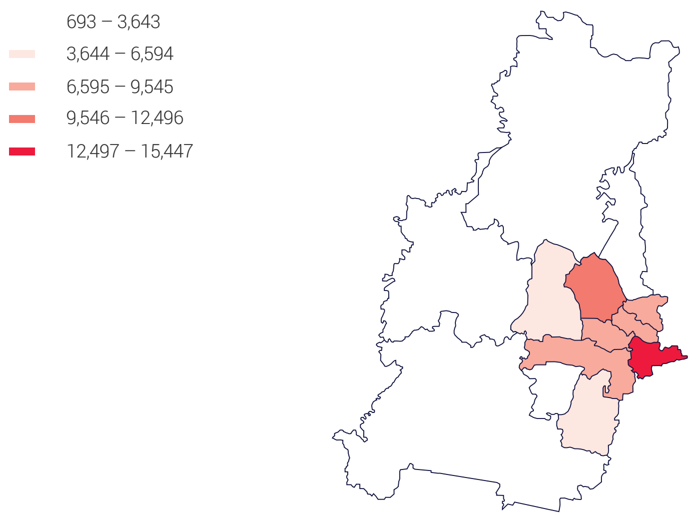
Local government area	2016 (N)	2016 (%)	2011 (N)	2011 (%)	Change in Number	Change in Proportion
Blacktown	9,580	29.3%	7,857	27.7%	1,723	5.8%
Blue Mountains	1,950	36.4%	1,920	35.2%	30	3.4%
Camden	1,242	24.6%	865	25.6%	377	-3.9%
Campbelltown	5,153	31.1%	4,046	28.0%	1,107	11.1%
Canterbury Bankstown	15,441	39.1%	12,159	36.2%	3,282	8.0%
Cumberland	9,485	36.3%	7,653	35.0%	1,832	3.7%
Fairfield	8,905	44.3%	6,887	39.8%	2,018	11.3%
Hawkesbury	1,573	30.2%	1,520	29.0%	53	4.1%
Liverpool	6,752	35.6%	5,125	31.2%	1,627	14.1%
Parramatta	7,733	24.3%	6,007	24.5%	1,726	-0.8%
Penrith	5,726	29.6%	4,477	28.0%	1,249	5.7%
The Hills	1,586	19.2%	1,218	18.6%	368	3.2%
Wollondilly	693	29.9%	663	28.9%	30	3.5%
Total	**75,819**	**32.8%**	**60,397**	**30.9%**	**15,422**	**6.1%**
Greater Sydney	**147,789**	**26.4%**	**122,165**	**25.1%**	**25,624**	**5.2%**

Source: profile.id, 2017

Rate of rental stress 2011 and 2016



Number of households in rental stress in 2016



Rental costs **increased at a higher rate** than incomes, with most areas showing a **higher price to income gap** than Greater Sydney

Percentage growth from 2011 to 2016

Local government area	Median weekly household income growth	Median weekly rental payment growth	Income growth to rental price growth gap
Blacktown	23.4%	26.2%	2.8%
Blue Mountains	15.9%	27.0%	11.1%
Camden	18.7%	28.7%	10.0%
Campbelltown	16.8%	35.4%	18.6%
Canterbury Bankstown	22.1%	24.9%	2.8%
Cumberland	23.7%	26.3%	2.6%
Fairfield	19.7%	27.2%	7.5%
Hawkesbury	20.6%	29.0%	8.4%
Liverpool	19.4%	26.5%	7.1%
Parramatta	20.8%	23.8%	3.0%
Penrith	18.6%	24.7%	6.1%
The Hills	11.5%	24.0%	12.5%
Wollondilly	26.3%	35.3%	9.0%
Greater Sydney	**20.8%**	**23.8%**	**3.0%**

Source: profile.id, 2017

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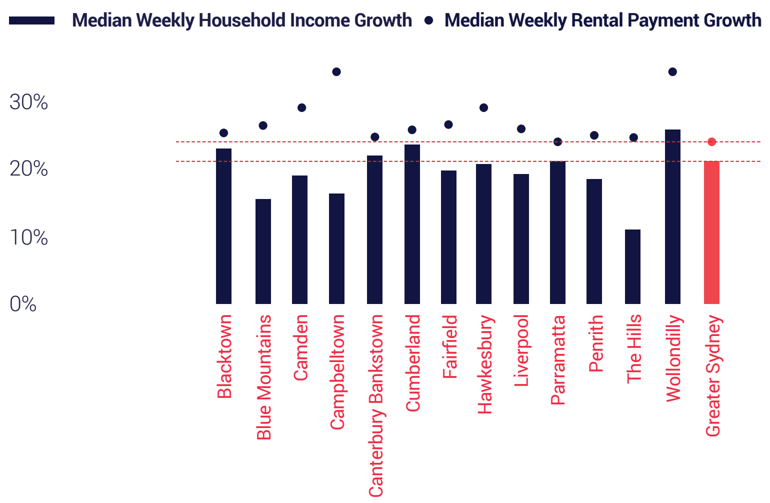
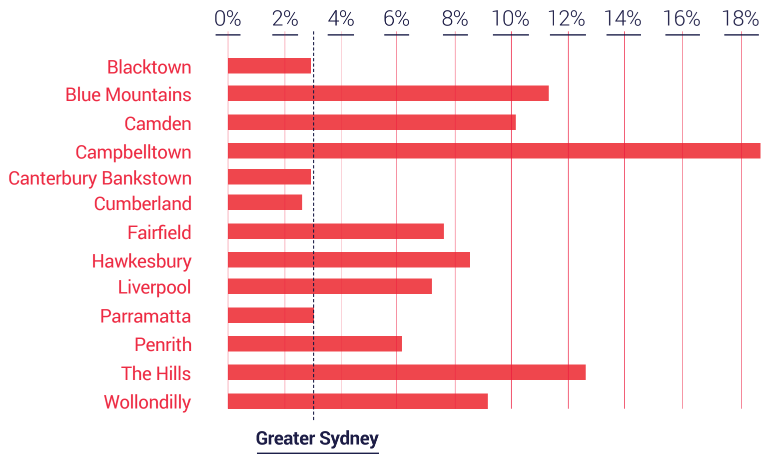
Percentage growth from 2011 to 2016



Income growth to rental price growth gap



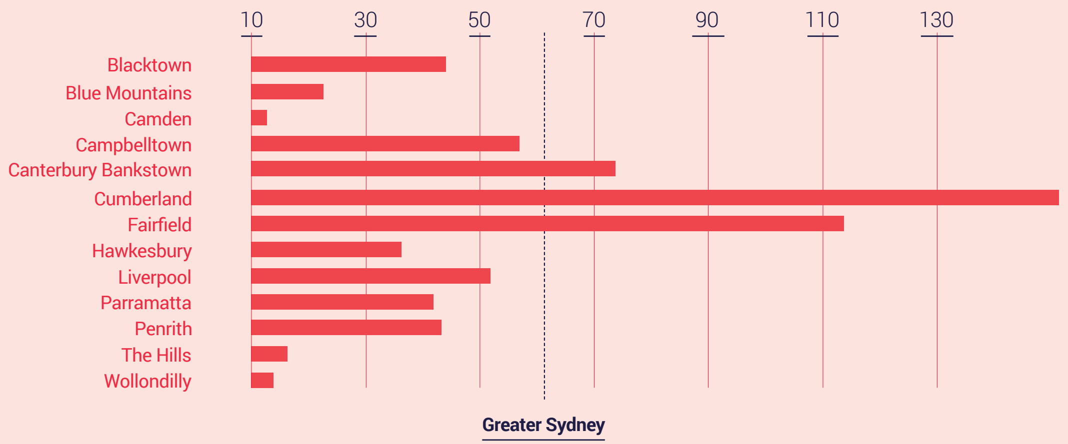
The growth in median household incomes between 2011 and 2016 did not reflect the growth in median rental costs across all local government areas of Western Sydney, exacerbating high levels of rental stress.

In terms of the median household rental costs, all local government areas in Western Sydney increased at a higher rate than Greater Sydney, with the exception of Parramatta local government area which grew at the same rate as Greater Sydney. In Campbelltown and Wollondilly local government areas, very high rates of growth in median household rental costs occurred, with increases of over 35 percent.

When compared to growth in rental costs, there was a lower rate of increase to median household incomes, effectively increasing the gap between cost and income from 2011 to 2016. The highest gap between rental price and income is in Campbelltown local government area which stood at 18.6 percent, being almost six times Greater Sydney's gap of 3 percent. The gap in the Hills local government area of 12.4 percent was also notable at more than four times that of Greater Sydney.

Homelessness **increased significantly** since **2011**, at a far **greater rate** than the state and national increases

Rate of homelessness per 10,000 residents in 2016



In 2016, it was estimated that there were over 14,000 people experiencing homelessness in Western Sydney, an increase of more than 5,000 people or 57.8 percent since 2011. This represents more than half of Greater Sydney's homeless population. Homelessness increased at a much higher rate in Western Sydney compared to Greater Sydney at 47.5 percent, NSW at 37.1 percent and Australia at 13.7 percent.

Cumberland local government area had the highest number of people experiencing homelessness in Western Sydney in 2016 with just over 3,000. It is important to note that data was not available for the Cumberland local government area in 2011 and a suitable estimate has been applied. Applying this estimate indicates an extraordinary increase in the number of people experiencing homelessness which far exceeds any other local government area and Greater Sydney.

The Canterbury Bankstown and Fairfield local government areas also had high numbers of people experiencing homelessness, with a higher growth rate than the regional average of 57.8 percent.

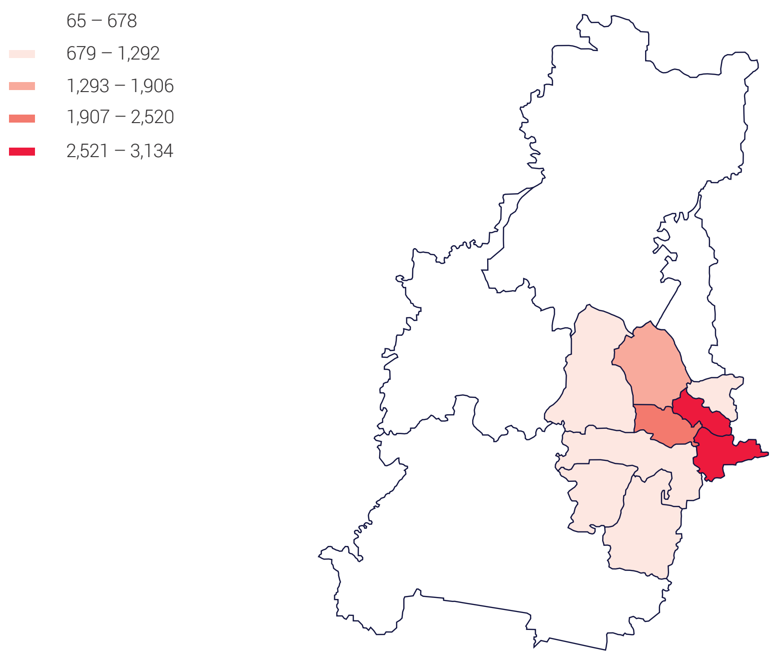
Estimating Homelessness

Local government area	2016	2011	Change (N)	Change (%)	Rate per 10,000 residents 2016
Blacktown	1,534	1,400	134	9.6%	45.5
Blue Mountains	170	238	-68	-28.6%	22.1
Camden	96	86	10	11.6%	12.3
Campbelltown	928	644	284	44.1%	59.1
Canterbury Bankstown	2,582	1,496	1,086	72.6%	74.6
Cumberland	3,129	1,053*	2,076	197.2%	144.8
Fairfield	2,226	1,384	842	60.8%	112
Hawkesbury	231	199	32	16.1%	35.8
Liverpool	1,058	778	280	36.0%	51.8
Parramatta	987	804	183	22.8%	43.6
Penrith	890	607	283	46.6%	45.4
The Hills	251	204	47	23.0%	16.0
Wollondilly	65	71	-6	-8.5%	13.4
Total	**14,147**	**8,964**	**5,183**	**57.8%**	**61.3**
Greater Sydney	**27,963**	**18,955**	**9,008**	**47.5%**	**62.2**
NSW	**37,692**	**27,483**	**10,209**	**37.1%**	**50.4**
Australia	**116,427**	**102,439**	**13,988**	**13.7%**	**49.8**

Source: Estimating Homelessness in Greater Western Sydney, WESTIR, 2018

*Not available. Estimate only based on number in Auburn (628 persons) and Holroyd (425 persons) local government areas. Impact of council amalgamations in 2016 may have redistributed numbers across Parramatta and Cumberland local government areas.

Number of people estimated to be homeless in 2016



The current social and affordable housing supply only met **40.6** percent of the total demand

There were over 46,000 social and affordable housing dwellings in Western Sydney in 2016. This contrasts to a total demand of over 114,000 dwellings, a shortfall of more than 67,000.

In terms of the current social and affordable housing supply, Blacktown local government area had the highest number of existing dwellings with close to 10,000. Campbelltown, Cumberland, Fairfield, Parramatta and Liverpool local government areas also had a higher number of social and affordable housing dwellings in comparison to other local government areas.

The largest gap between supply and demand in 2016 for social and affordable housing dwellings was in the Cumberland local government area with over 11,000 additional dwellings required. Blacktown and Fairfield local government area also had notable levels of unmet demand.

The gap between current supply and unmet demand in 2016 ranges from just under two to more than five times the current level of dwellings available. Campbelltown is the only local government area in Western Sydney that met more than 50 percent of its demand for social and affordable housing. Comparatively and markedly, The Hills local government area only met 18 percent of its demand.

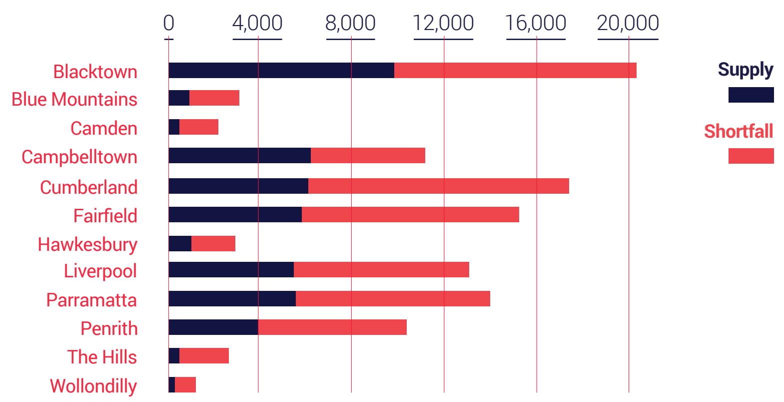
It is important to note that data was not available for the Canterbury Bankstown local government area for a comparative analysis.

Demand for social and affordable housing in 2016

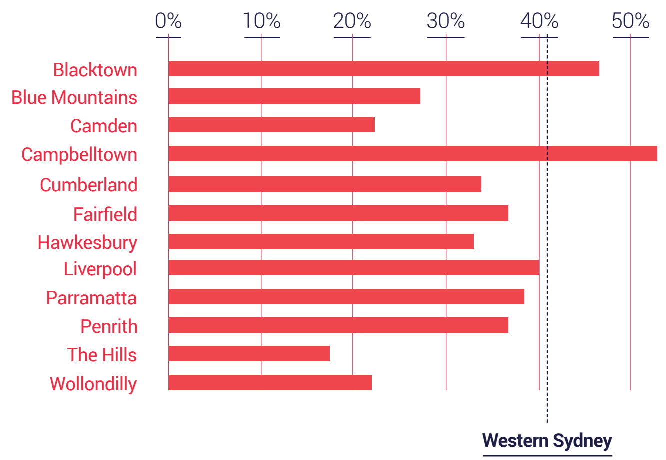
Local government area	Demand	Supply	Shortfall	Proportion of demand met
Blacktown	20,371	9,901	10,470	48.6%
Blue Mountains	3,146	893	2,253	28.4%
Camden	2,200	512	1,688	23.3%
Campbelltown	11,224	6,172	5,052	55.0%
Canterbury Bankstown	Not Available			
Cumberland	17,472	6,129	11,343	35.1%
Fairfield	15,313	5,849	9,464	38.2%
Hawkesbury	2,945	1,016	1,929	34.5%
Liverpool	13,118	5,471	7,647	41.7%
Parramatta	14,000	5,580	8,420	39.9%
Penrith	10,392	3,970	6,422	38.2%
The Hills	2,634	478	2,156	18.1%
Wollondilly	1,186	272	914	22.9%
Total	**114,001**	**46,243**	**67,758**	**40.6%**

Source: Demand for Social and Affordable Housing in Western Sydney City Deal area and Demand for Social and Affordable Housing in Blacktown, Cumberland, Parramatta and The Hills LGAs, SGS Economics and Planning, 2018

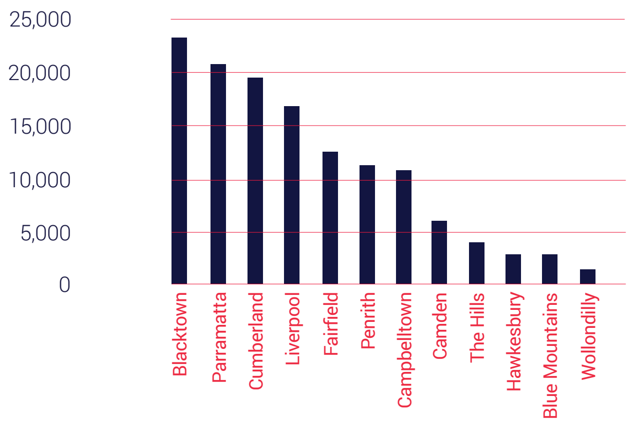
Social and affordable housing supply and shortfall, 2016



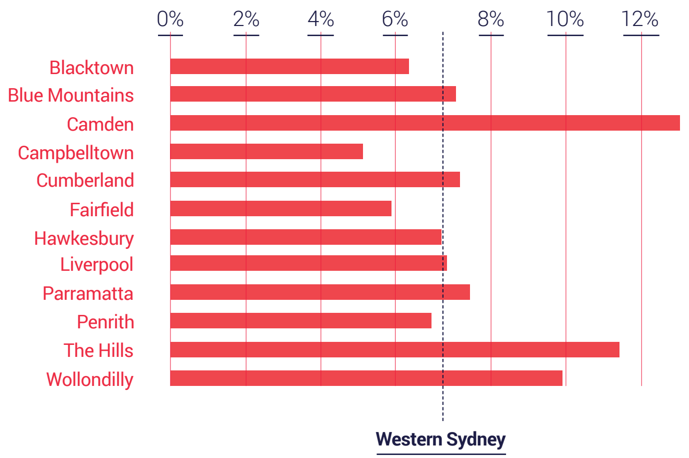
Proportion of social and affordable housing demand met in 2016



Change required to meet forecast demand to 2036



Average annual growth rate to 2036



Social and affordable housing demand forecast

Local government area	Supply 2016	Forecast demand 2036	Change	Average annual growth rate
Blacktown	9,901	32,539	22,638	6.1%
Blue Mountains	893	3,750	2,857	7.4%
Camden	512	6,514	6,002	13.6%
Campbelltown	6,172	16,718	10,546	5.1%
Canterbury Bankstown	Not Available			
Cumberland	6,129	25,116	18,987	7.3%
Fairfield	5,849	18,062	12,213	5.8%
Hawkesbury	1,016	4,015	2,999	7.1%
Liverpool	5,471	21,849	16,378	7.2%
Parramatta	5,580	25,766	20,186	7.9%
Penrith	3,970	14,932	10,962	6.8%
The Hills	478	4,478	4,000	11.8%
Wollondilly	272	1,924	1,652	10.3%
Total	**46,243**	**175,663**	**129,420**	**6.9%**

Source: Demand for Social and Affordable Housing in Western Sydney City Deal area and Demand for Social and Affordable Housing in Blacktown, Cumberland, Parramatta and The Hills LGAs, SGS Economics and Planning, 2018

Almost **6,500 additional social and affordable housing dwellings** are needed per year to meet the forecast demand in 2036

To meet projected demand in 2036, more than 129,000 additional social and affordable housing dwellings would need to be made available in the region. This represents an average annual growth rate of almost seven percent across the region.

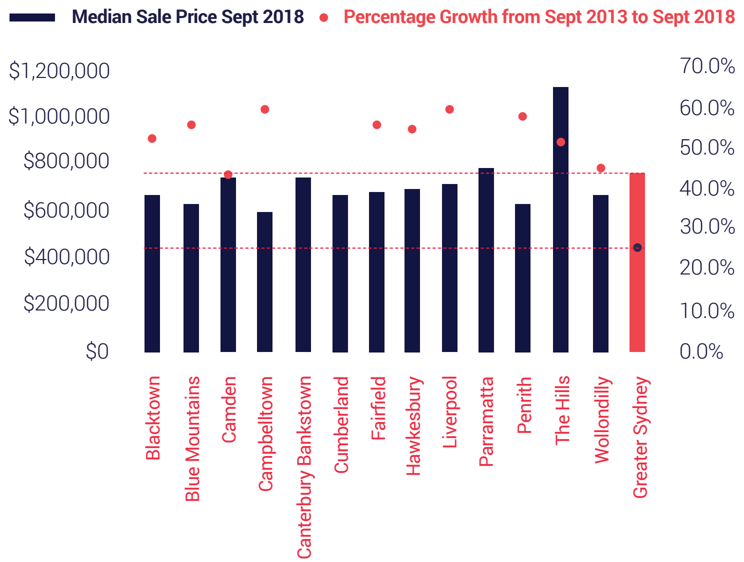
The largest gap between current supply and projected demand in 2036 is in Blacktown local government area, with almost 23,000 additional dwellings projected to be needed to meet demand. Blacktown, along with Parramatta, Cumberland and Liverpool local government areas, account for just over 60 percent of overall projected unmet need.

While Camden, The Hills and Wollondilly local governments areas are expected to experience a lower level of demand for social and affordable dwellings, the average annual growth rate required, relative to current supply, is notably high.

It is important to note that data was not available for the Canterbury Bankstown local government area for a comparative analysis.

Local government area	Sept 2018 Median Sale Price	Sept 2013 Median Sale Price	Change (%)
Blacktown	$680,000	$445,000	52.8%
Blue Mountains	$630,000	$405,000	55.6%
Camden	$705,000	$496,000	42.1%
Campbelltown	$575,000	$360,000	59.7%
Canterbury Bankstown	$705,000	N/A	N/A
Cumberland	$678,000	N/A	N/A
Fairfield	$695,000	$450,000	54.4%
Hawkesbury	$706,000	$462,000	52.8%
Liverpool	$700,000	$437,000	60.2%
Parramatta	$770,000	N/A	N/A
Penrith	$630,000	$400,000	57.5%
The Hills	$1,120,000	$735,000	52.4%
Wollondilly	$658,000	$455,000	44.6%
Greater Sydney	**$806,000**	**$590,000**	**36.6%**

Median Sale Price 2018 and Rate of Growth from 2013 to 2018



Sources:

Sales, Trend March 1991 – March 2017, Metropolitan LGAs, NSW Department of Family and Community Services, 2017

Sales tables September Quarter 2018, NSW Department of Family and Community Services, 2019

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Home sale prices grew at a **faster rate** than Greater Sydney overall from **2013** to **2018**

All local government areas in the region experienced a growth in median sale price that was higher than Greater Sydney's median rate of growth of 36.6 percent.

At 60.2 percent, Liverpool local government area had the highest growth in median sale price from 2013 to 2018. By contrast, Camden had the lowest growth of median sale prices at 42.1 percent, still higher than the Greater Sydney rate. Campbelltown and Penrith local government areas also had high rates of growth in median sale prices comparatively.

This rate of growth indicates that from 2013 to 2018, the pathway to home ownership for people who live in Western Sydney came at a higher cost.

It is important to note that the NSW Government's decisions regarding council amalgamation in 2016 affected several councils in Western Sydney. As a result, growth figures were unable to be calculated for the Canterbury Bankstown, Cumberland and Parramatta local government areas.

Blacktown

366,534 people estimated to reside in Blacktown in 2018

521,450 people projected to reside in Blacktown by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 9,901 social and affordable housing dwellings in 2016

An annual growth of 6.1% is required to meet demand in 2036

Demand of 20,371 social and affordable housing dwellings in 2016

There was an unmet demand of 10,470 social and affordable housing dwellings in 2016

Forecast demand of 32,539 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by 2036 of 22,638 social and affordable housing dwellings

Homelessness

Estimated homeless population of 1,534 in 2016

This represents an increase of 9.6% since 2011

Housing Stress

13.5% of households experienced housing stress in 2016

This represents a decline in proportion of 2.2% since 2011, but an increase of 969 households

29.3% of renting households experienced rental stress in 2016

This represents an increase in proportion of 5.8% since 2011, or an increase of 1,723 households

Housing Costs

Median home sale price was $680,000 in the third quarter of 2018

This represents a growth of 52.8% since the third quarter of 2013

Median weekly rental costs grew by 26.2% between 2011 and 2016

Median gross weekly household income grew by 23.4% between 2011 and 2016

This represents a price to income growth gap of 2.8%

Blue Mountains

79,260 people estimated to reside in Blue Mountains in 2018

90,400 people projected to reside in Blue Mountains by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 893 social and affordable housing dwellings in 2016

An annual growth of **7.4%** is required to meet demand in **2036**

Demand of 3,146 social and affordable housing dwellings in 2016

There was an unmet demand of **2,253** social and affordable housing dwellings in **2016**

Forecast demand of 3,750 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by **2036** of **2,857** social and affordable housing dwellings

Homelessness

Estimated homeless population of 170 in 2016

This represents a decline of **28.6%** since **2011**

Housing Stress

9.6% of households experienced housing stress in 2016

This represents a decline in proportion of **5.9%** since 2011, or a decline of **117** households

36.4% of renting households experienced rental stress in 2016

This represents an increase in proportion of **3.4%** since 2011, or an increase of **30** households

Housing Costs

Median home sale price was $630,000 in the third quarter of 2018

This represents a growth of **55.6%** since the third quarter of 2013

Median weekly rental costs grew by 27% between 2011 and 2016

Median gross weekly household income grew by 15.9% between 2011 and 2016

This represents a price to income growth gap of **11.1%**

Camden

94,159 people estimated to reside in Camden in 2018

224,550 people projected to reside in Camden by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 512 social and affordable housing dwellings in 2016

An annual growth of **13.6%** is required to meet demand in **2036**

Demand of 2,200 social and affordable housing dwellings in 2016

There was an unmet demand of **1,688** social and affordable housing dwellings in **2016**

Forecast demand of 6,514 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by **2036** of **6,002** social and affordable housing dwellings

Homelessness

Estimated homeless population of 96 in 2016

This represents an increase of **11.6%** since **2011**

Housing Stress

9% of households experienced housing stress in 2016

This represents a decline in proportion of **6.3%** since 2011, but an increase of **489** households

24.6% of renting households experienced rental stress in 2016

This represents a decline in proportion of **3.9%** since 2011, but an increase of **377** households

Housing Costs

Median home sale price was $705,000 in the third quarter of 2018

This represents a growth of **42.1%** since the third quarter of 2013

Median weekly rental costs grew by 28.7% between 2011 and 2016

Median gross weekly household income grew by 18.7% between 2011 and 2016

This represents a price to income growth gap of **10%**

Campbelltown

168,139 people estimated to reside in Campbelltown in 2018

233,150 people projected to reside in Campbelltown by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 6,172 social and affordable housing dwellings in 2016

An annual growth of 5.1% is required to meet demand in 2036

Demand of 11,224 social and affordable housing dwellings in 2016

There was an unmet demand of 5,052 social and affordable housing dwellings in 2016

Forecast demand of 16,718 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by 2036 of 10,546 social and affordable housing dwellings

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Homelessness

Estimated homeless population of 928 in 2016

This represents an increase of 44.1% since 2011

Housing Stress

15% of households experienced housing stress in 2016

This represents an increase in proportion of 7.9% since 2011, or an increase of 1,040 households

31.1% of renting households experienced rental stress in 2016

This represents an increase in proportion of 11.1% since 2011, or an increase of 1,107 households

Housing Costs

Median home sale price was $575,000 in the third quarter of 2018

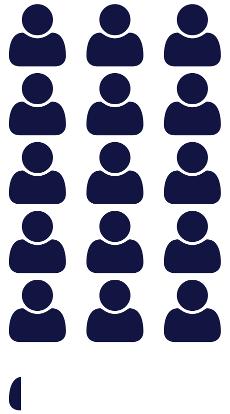
This represents a growth of 59.7% since the third quarter of 2013

Median weekly rental costs grew by 35.4% between 2011 and 2016

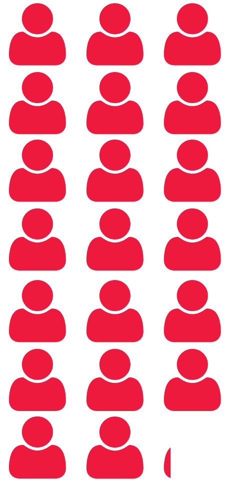
Median gross weekly household income grew by 16.8% between 2011 and 2016

This represents a price to income growth gap of 18.6%

Canterbury Bankstown



373,931 people estimated to reside in Canterbury Bankstown in 2018



502,850 people projected to reside in Canterbury Bankstown by 2036

Homelessness

Estimated homeless population of 2,582 in 2016

This represents an increase of 72.6% since 2011

Housing Stress

18.6% of households experienced housing stress in 2016

This represents an increase in proportion of 6.9% since 2011, or an increase of 2,322 households

39.1% of renting households experienced rental stress in 2016

This represents an increase in proportion of 8% since 2011, or an increase of 3,282 households

Housing Costs

Median home sale price was $705,000 in the third quarter of 2018

Median weekly rental costs grew by 24.9% between 2011 and 2016

Median gross weekly household income grew by 22.1% between 2011 and 2016

This represents a price to income growth gap of 2.8%

Cumberland

236,893 people estimated to reside in Cumberland in 2018

292,450 people projected to reside in Cumberland by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 6,129 social and affordable housing dwellings in 2016

An annual growth of 7.3% is required to meet demand in 2036

Demand of 17,472 social and affordable housing dwellings in 2016

There was an unmet demand of 11,343 social and affordable housing dwellings in 2016

Forecast demand of 25,116 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by 2036 of 18,987 social and affordable housing dwellings

Homelessness

Estimated homeless population of 3,129 in 2016

This represents an increase of 197.2% since 2011*

Housing Stress

19.1% of households experienced housing stress in 2016

This represents an increase in proportion of 2.7% since 2011, or an increase of 1,066 households

36.3% of renting households experienced rental stress in 2016

This represents an increase in proportion of 3.7% since 2011, or an increase of 1,832 households

*Estimate only based on number in Auburn (628 persons) and Holroyd (425 persons) local government areas. Impact of council amalgamations in 2016 may have redistributed numbers across Parramatta and Cumberland local government areas.

Housing Costs

Median home sale price was $678,000 in the third quarter of 2018

Median weekly rental costs grew by 26.3% between 2011 and 2016

Median gross weekly household income grew by 23.7% between 2011 and 2016

This represents a price to income growth gap of 2.6%

Fairfield

210,612 people estimated to reside in Fairfield in 2018

226,700 people projected to reside in Fairfield by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 5,849 social and affordable housing dwellings in 2016

An annual growth of **5.8%** is required to meet demand in **2036**

Demand of 15,313 social and affordable housing dwellings in 2016

There was an unmet demand of **9,464** social and affordable housing dwellings in **2016**

Forecast demand of 18,062 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by **2036** of **12,213** social and affordable housing dwellings

Homelessness

Estimated homeless population of 2,226 in 2016

This represents an increase of **60.8%** since **2011**

Housing Stress

20.9% of households experienced housing stress in 2016

This represents an increase in proportion of **5.6%** since 2011, or an increase of **1,078** households

44.3% of renting households experienced rental stress in 2016

This represents an increase in proportion of **11.3%** since 2011, or an increase of **2,018** households

Housing Costs

Median home sale price was $695,000 in the third quarter of 2018

This represents a growth of **54.4%** since the third quarter of 2013

Median weekly rental costs grew by 27.2% between 2011 and 2016

Median gross weekly household income grew by 19.7% between 2011 and 2016

This represents a price to income growth gap of **7.5%**

Hawkesbury

67,083 people estimated to reside in Hawkesbury in 2018

85,050 people projected to reside in Hawkesbury by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 1,016 social and affordable housing dwellings in 2016

An annual growth of 7.1% is required to meet demand in 2036

Demand of 2,945 social and affordable housing dwellings in 2016

There was an unmet demand of 1,929 social and affordable housing dwellings in 2016

Forecast demand of 4,015 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by 2036 of 2,999 social and affordable housing dwellings

Homelessness

Estimated homeless population of 231 in 2016

This represents an increase of 16.1% since 2011

Housing Stress

10.5% of households experienced housing stress in 2016

This represents a decline in proportion of 7.1% since 2011, or a decline of 102 households

30.2% of renting households experienced rental stress in 2016

This represents an increase in proportion of 4.1% since 2011, or an increase of 53 households

Housing Costs

Median home sale price was $706,000 in the third quarter of 2018

This represents a growth of 52.8% since the third quarter of 2013

Median weekly rental costs grew by 29% between 2011 and 2016

Median gross weekly household income grew by 20.6% between 2011 and 2016

This represents a price to income growth gap of 8.4%

Liverpool

223,304 people estimated to reside in Liverpool in 2018

331,000 people projected to reside in Liverpool by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 5,471 social and affordable housing dwellings in 2016

An annual growth of 7.2% is required to meet demand in 2036

Demand of 13,118 social and affordable housing dwellings in 2016

There was an unmet demand of 7,647 social and affordable housing dwellings in 2016

Forecast demand of 21,849 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by 2036 of 16,378 social and affordable housing dwellings

Homelessness

Estimated homeless population of 1,058 in 2016

This represents an increase of 36% since 2011

Housing Stress

16.8% of households experienced housing stress in 2016

This represents an increase in proportion of 3.7% since 2011, or an increase of 1,385 households

35.6% of renting households experienced rental stress in 2016

This represents an increase in proportion of 14.1% since 2011, or an increase of 1,627 households

Housing Costs

Median home sale price was $700,000 in the third quarter of 2018

This represents a growth of 60.2% since the third quarter of 2013

Median weekly rental costs grew by 26.5% between 2011 and 2016

Median gross weekly household income grew by 19.4% between 2011 and 2016

This represents a price to income growth gap of 7.1%

Parramatta

251,311 people estimated to reside in Parramatta in 2018

416,750 people projected to reside in Parramatta by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 5,580 social and affordable housing dwellings in 2016

An annual growth of 7.9% is required to meet demand in 2036

Demand of 14,000 social and affordable housing dwellings in 2016

There was an unmet demand of 8,420 social and affordable housing dwellings in 2016

Forecast demand of 25,766 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by 2036 of 20,186 social and affordable housing dwellings

Homelessness

Estimated homeless population of 987 in 2016

This represents an increase of 22.8% since 2011

Housing Stress

13.1% of households experienced housing stress in 2016

This represents an increase in proportion of 6.5% since 2011, or an increase of 1,848 households

24.3% of renting households experienced rental stress in 2016

This represents a decline in proportion of 0.8% since 2011, but an increase of 1,726 households

Housing Costs

Median home sale price was $770,000 in the third quarter of 2018

Median weekly rental costs grew by 23.8% between 2011 and 2016

Median gross weekly household income grew by 20.8% between 2011 and 2016

This represents a price to income growth gap of 3%

Penrith

209,210 people estimated to reside in Penrith in 2018

270,750 people projected to reside in Penrith by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 3,970 social and affordable housing dwellings in 2016

An annual growth of **6.8%** is required to meet demand in **2036**

Demand of 10,392 social and affordable housing dwellings in 2016

There was an unmet demand of **6,422** social and affordable housing dwellings in **2016**

Forecast demand of 14,932 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by **2036** of **10,962** social and affordable housing dwellings

Homelessness

Estimated homeless population of 890 in 2016

This represents an increase of **46.6%** since **2011**

Housing Stress

12.2% of households experienced housing stress in 2016

This represents an increase in proportion of **2.5%** since 2011, or an increase of **843** households

29.6% of renting households experienced rental stress in 2016

This represents an increase in proportion of **5.7%** since 2011, or an increase of **1,249** households

Housing Costs

Median home sale price was $630,000 in the third quarter of 2018

This represents a growth of **57.5%** since the third quarter of 2013

Median weekly rental costs grew by 24.7% between 2011 and 2016

Median gross weekly household income grew by 18.6% between 2011 and 2016

This represents a price to income growth gap of **6.1%**

The Hills

172,473 people estimated to reside in The Hills in 2018

290,900 people projected to reside in The Hills by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 478 social and affordable housing dwellings in 2016

An annual growth of **11.8%** is required to meet demand in **2036**

Demand of 2,634 social and affordable housing dwellings in 2016

There was an unmet demand of **2,156** social and affordable housing dwellings in **2016**

Forecast demand of 4,478 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by **2036** of **4,000** social and affordable housing dwellings

Homelessness

Estimated homeless population of 251 in 2016

This represents an increase of **23%** since **2011**

Housing Stress

6.8% of households experienced housing stress in 2016

This represents an increase in proportion of **3%** since 2011, or an increase of **338** households

19.2% of renting households experienced rental stress in 2016

This represents an increase in proportion of **3.2%** since 2011, or an increase of **368** households

Housing Costs

Median home sale price was $1,120,000 in the third quarter of 2018

This represents a growth of **52.4%** since the third quarter of 2013

Median weekly rental costs grew by 24% between 2011 and 2016

Median gross weekly household income grew by 11.5% between 2011 and 2016

This represents a price to income growth gap of **12.5%**

Wollondilly

52,230 people estimated to reside in Wollondilly in 2018

72,600 people projected to reside in Wollondilly by 2036

Social and Affordable Housing Supply and Demand

Existing supply of 272 social and affordable housing dwellings in 2016

An annual growth of **10.3%** is required to meet demand in **2036**

Demand of 1,186 social and affordable housing dwellings in 2016

There was an unmet demand of **914** social and affordable housing dwellings in **2016**

Forecast demand of 1,924 social and affordable housing dwellings by 2036

There is a shortfall between current supply and forecast demand by **2036** of **1,652** social and affordable housing dwellings

Homelessness

Estimated homeless population of 65 in 2016

This represents a decline of **8.5%** since **2011**

Housing Stress

8.2% of households experienced housing stress in 2016

This represents a decline in proportion of **14.6%** since 2011, or a decline of **80** households

29.9% of renting households experienced rental stress in 2016

This represents an increase in proportion of **3.5%** since 2011, or an increase of **30** households

Housing Costs

Median home sale price was $658,000 in the third quarter of 2018

This represents a growth of **44.6%** since the third quarter of 2013

Median weekly rental costs grew by 35.3% between 2011 and 2016

Median gross weekly household income grew by 26.3% between 2011 and 2016

This represents a price to income growth gap of **9%**

Definitions

Homelessness

This paper utilises the Australian Bureau of Statistics definition of homelessness: "When a person does not have suitable accommodation alternatives, they are considered homeless if their current living arrangement: (a) is in a dwelling that is inadequate, (b) has no tenure, or if their initial tenure is short and not extendable, or (c) does not allow them to have control of, and access to space for social relations".

Housing Stress

Housing stress is defined in this report using the National Centre for Social and Economic Modelling (NATSEM) model, as a household that spends more than 30 percent of their household income on rental or mortgage payments and is in the lowest 40 percent of income earners.

Rental Stress

Rental stress is defined in this report using the NATSEM model as households in the lowest 40% of incomes, who are paying more than 30% of their usual gross weekly income on rent.

Affordable Housing

Affordable housing is accommodation for people on low to moderate incomes. It is open to a broader range of household incomes than social housing, so households can earn higher levels of income and still be eligible. The rent for affordable housing is set at a discounted market rate or by a percentage of a person's income, usually between 25 to 30 percent, so that tenants are also able to meet other basic living costs such as food, clothing, transport, medical care and education.

Social Housing

Social housing is defined as secure and affordable rental housing for people on low incomes with housing needs and eligible under Housing Pathways.

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